Web Console User Guide

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Getting Started

To log in Web Console, enter the account number, password and logon type assigned by the distributor, and click the Logon button.

**The Home page appears with the account name and <u>Log Out</u> displayed above the Web Console menu bar, and Accounts Receivable information displayed below the menu bar.**

# Creating Orders Using Item Numbers

To create an order quickly using the distributor's 6-digit item numbers, click Rapid under Orders on the Web Console menu bar.
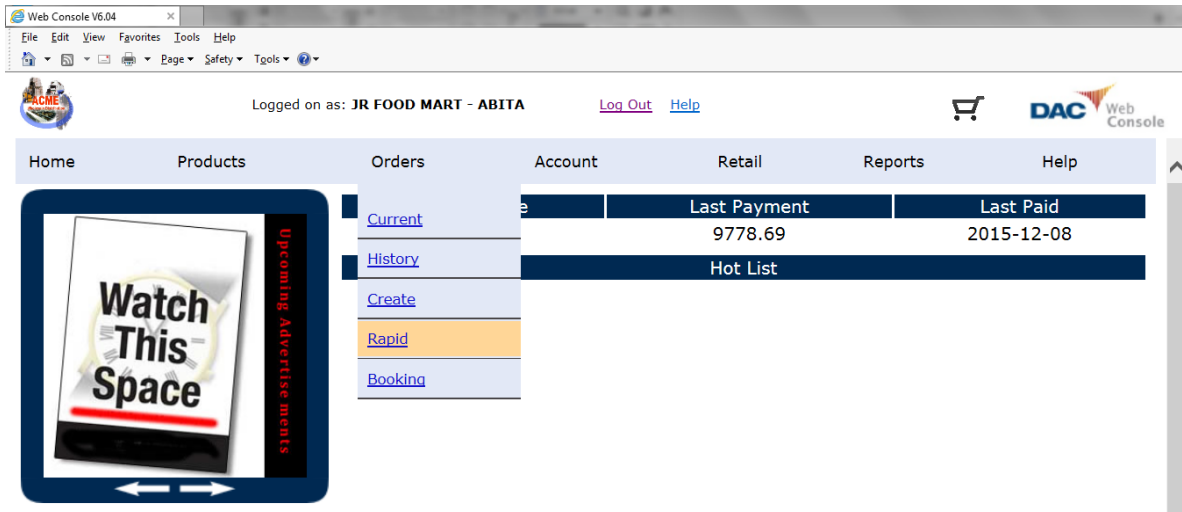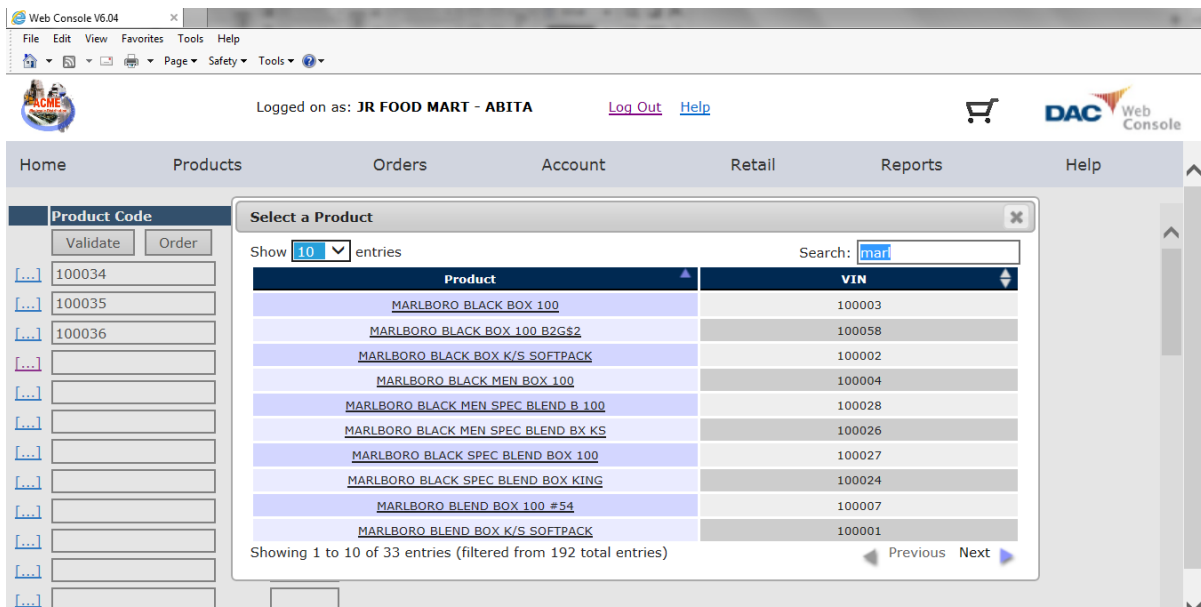

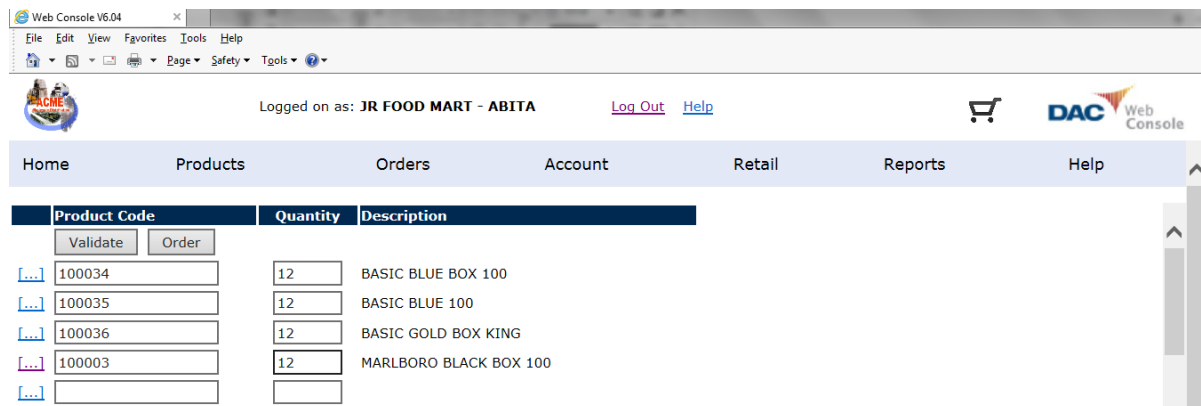**Enter a 6-digit item number in the Product Code box, and tab to the Quantity box to enter the order quantity.**
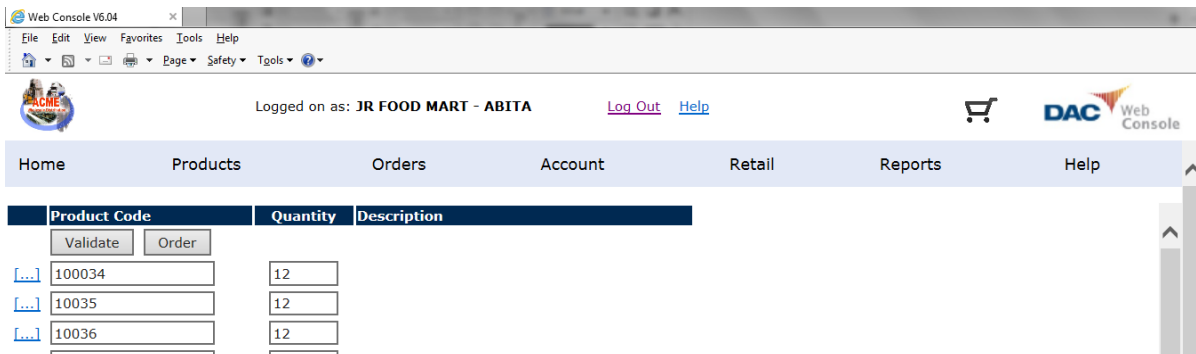
Click the Validate button to display the items' descriptions, and confirm the correct products will be ordered.
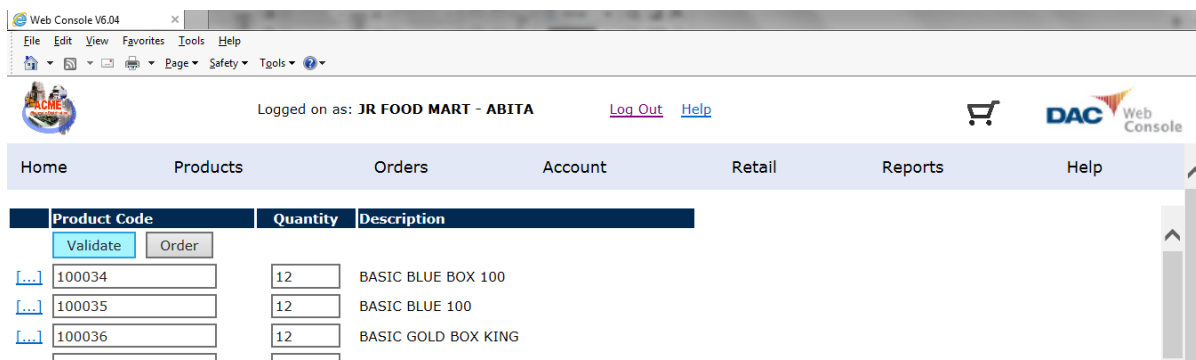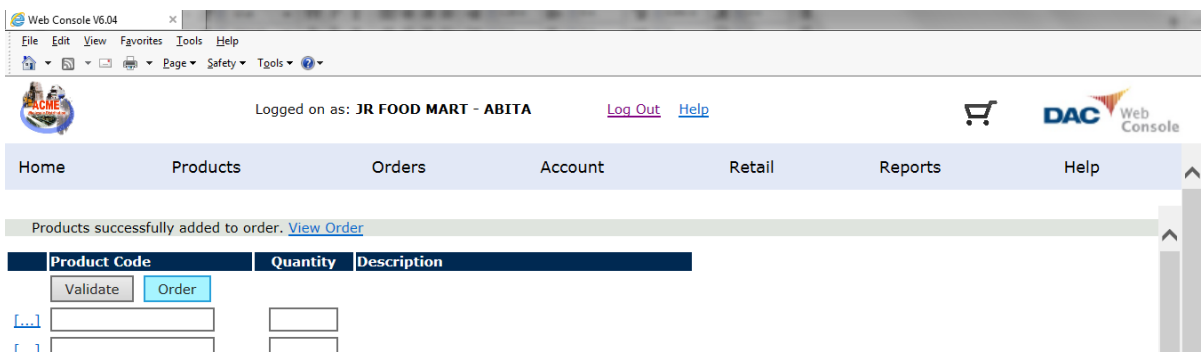
If needed, click […] at the far left to use the Select a Product popup.

Click an item's description in the Select a Product popup to add it to the order.

Click the Order button to save the order. The <u>View Order</u> link can be used to edit, delete and submit the order to the distributor.

Editing Orders

To edit an order, click <u>Current</u> under Orders on the Web Console menu bar, and click the order's number in the list of your current orders.

**The Remove check box can be used to delete an item from the order.
The New Qty. box can be used to change the order quantity of an item.
The Unit box can be used to change the unit ordered if case or eaches are available.
You must click the Apply Changes button to save these changes.**

To add an item to the order, enter its 6-digit item number and the order quantity in boxes below the Apply Changes button and click the Add to Order button, or click […] next to the boxes to use the Select a Product popup.

Creating Orders Using The Product Catalog

To create an order using the distributor's product catalog, click <u>Create</u> under Orders on the Web Console menu bar, select the Create an empty order option, and click the Continue >> button.

Click <u>Catalog</u> under Products on the Web Console menu bar.

To view all the products, click <u>Order</u> if the Retail Policy Overides are displayed.

To add items using descriptions, enter a portion of the item's description in the Search box, click the Contains option, and click the GO button.

To limit the list of items based on the beginning of the items' descriptions, enter it in the Search box, click the Position option, and click the GO button.

After locating a desired item, enter the order quantity in its Quantity box, and use the Unit box to change the unit ordered if necessary. Click the Order button to add the item to the order.

The RECENTLY ORDERED PRODUCTS link (below Home on the Web Console menu bar) can also be used to add items to orders.

The NEW PRODUCTS link (below Home on the Web Console menu bar) can also be used to add items to orders.

When all the desired items are added to the order, click <u>Current</u> under Orders on the Web Console menu bar.

Click the new order's number in the current orders list.

Refer to "Editing Orders" and "Deleting and Submitting Orders" for additional instructions.

Deleting and Submitting Orders

Click <u>Current</u> under Orders on the Web Console menu bar, and click the order's number in the list of your current orders.

To delete the order, click <u>Delete</u> under "Order Total" and click OK when the *Are you sure you want to delete this order?* message appears.

To submit the order to the distributor, click <u>Confirm</u> (under <u>Delete</u>), and click OK when the *Are you sure you want to confirm this order?* message appears.

Creating Template Orders

To create a template order, click <u>Create</u> under Orders on the Web Console menu bar, select the Create an empty order option, and click the Continue >> button.
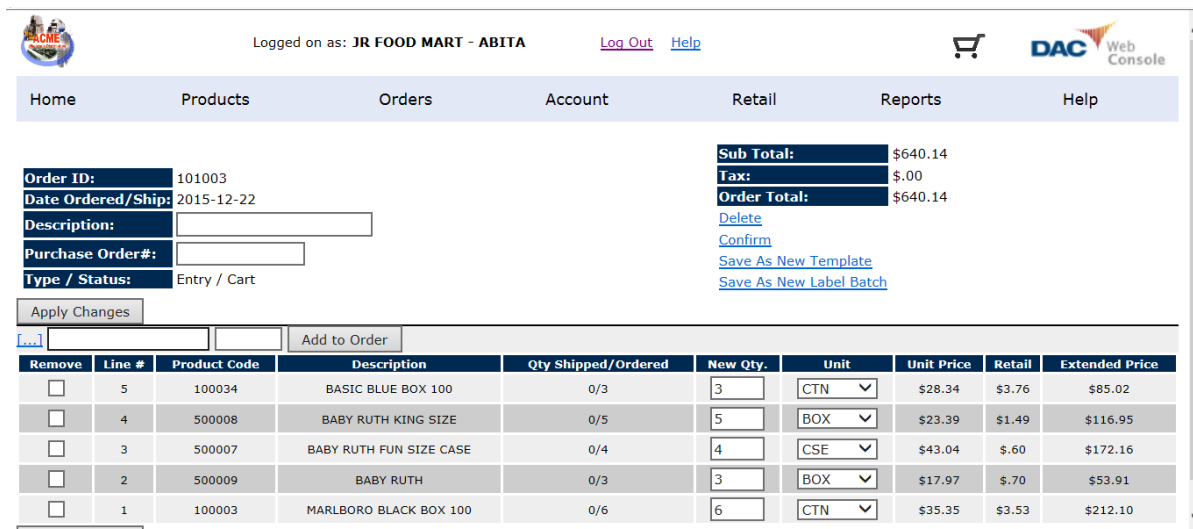
Refer to "Creating Orders Using The Product Catalog" and "Creating Orders Using Item Numbers" for information about adding items to the order.

When all the desired items are added to the template order, click <u>Current</u> under Orders on the Web Console menu bar, and click the new order's number in the current orders list.

Click <u>Save As New Template</u> to create the template order.

Enter a description of the template order, and click the Click to create your template button.

Printing Statements

Click <u>Statement</u> under Account on the Web Console menu bar.
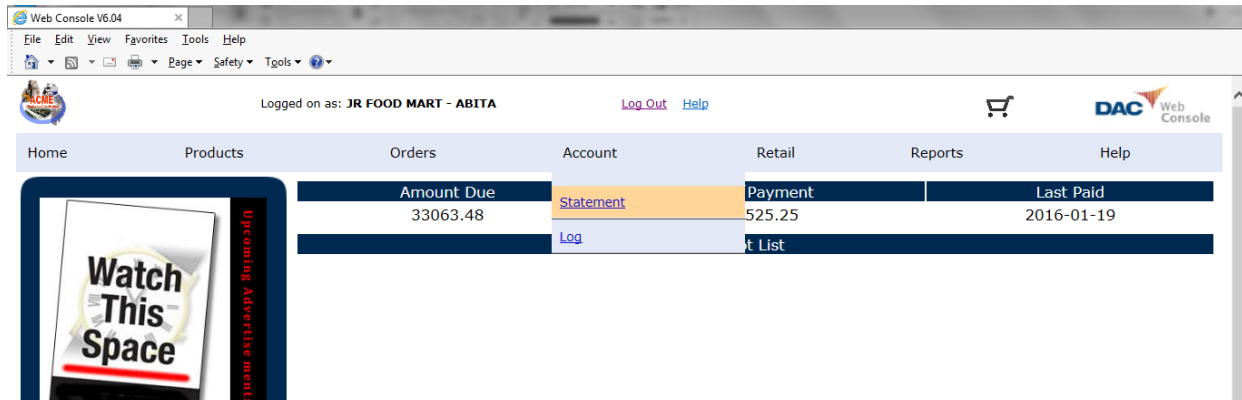
To print the statement, click <u>Click here to print</u> under "Statement of Account."

Date	Reference	Description	Original Amount	Remaining Amount	Running Balance
2015-12-29	101012 - 0015443	Invoice	$11525.25	$11525.25	$11525.25
2016-01-05	101019 - 0015483	Invoice	$11035.40	$11035.40	$22560.65
2016-01-12	101024 - 0015524	Invoice	$11035.05	$11035.05	$33595.70

Current	Over 30 Days	Over 60 Days	Over 90 Days	Over 120 Days	Total Due
$.00	$.00	$.00	$.00	$33595.70	**$33595.70**
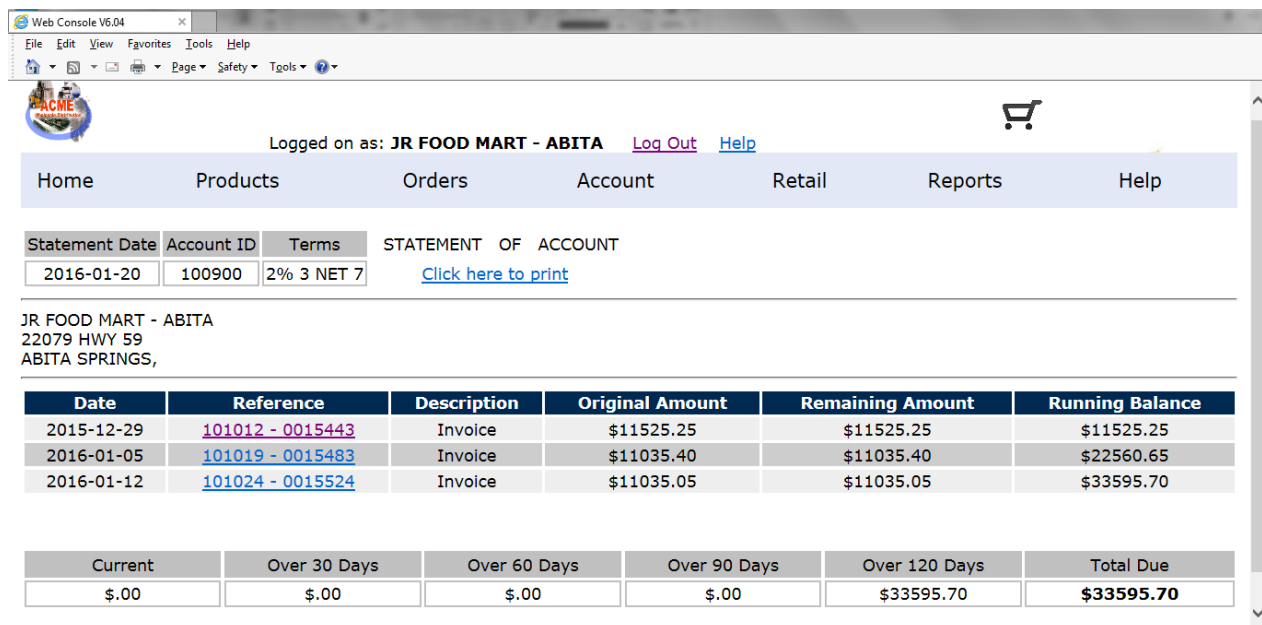
Viewing and Printing Statements

Click <u>Report Manager</u> under Reports on the Web Console menu bar.
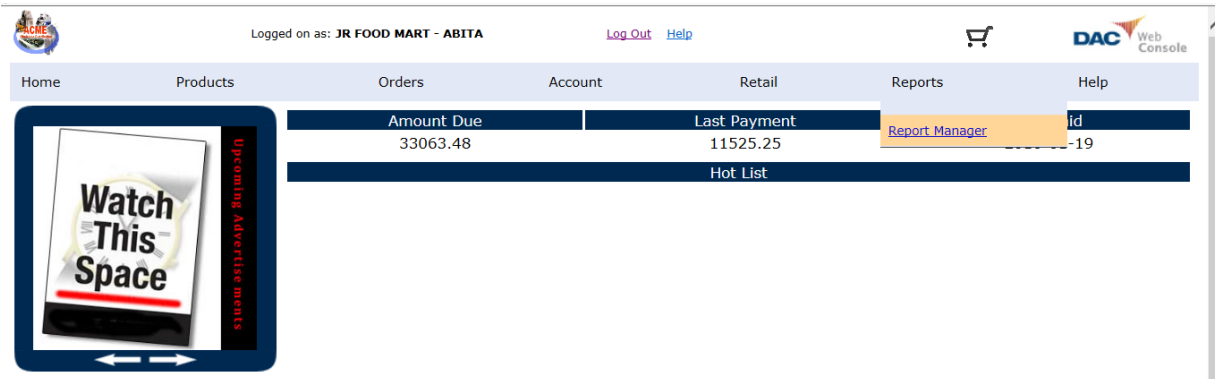
Click <u>Statement of Account</u> under the Generate a new Report heading.
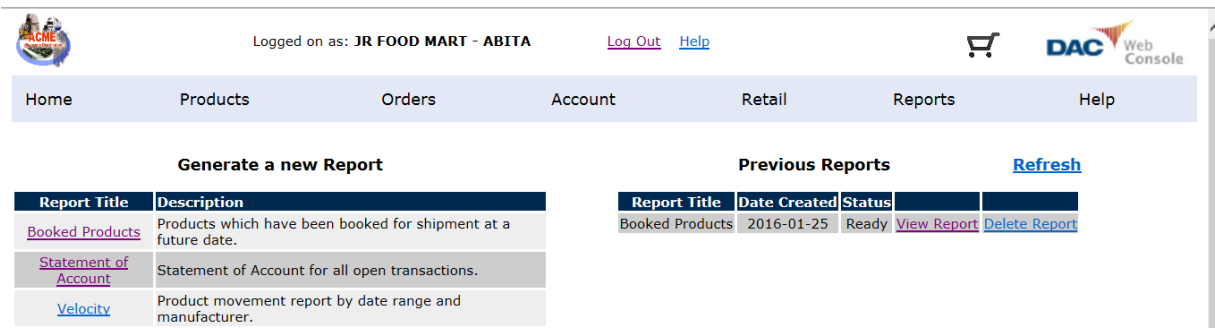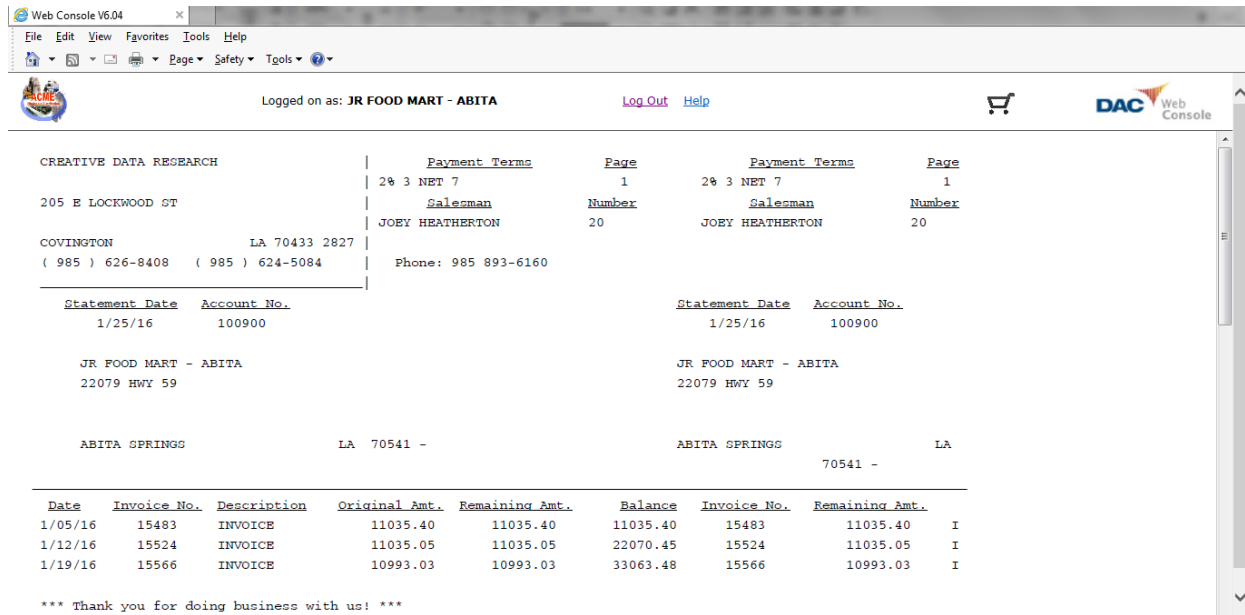
Click the Report button under the Statement of Account heading.
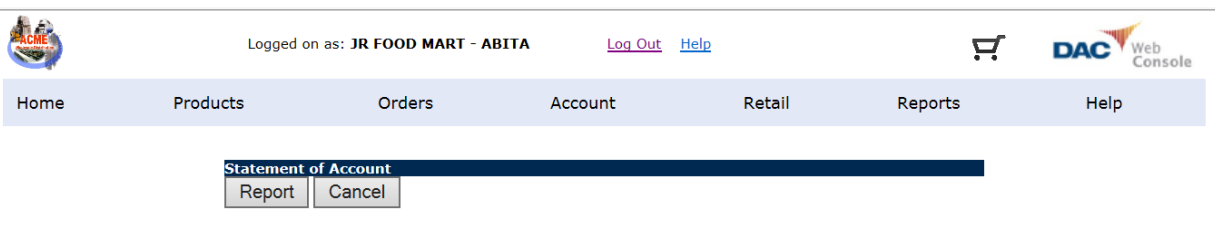
Click <u>Refresh</u> until the report appears with a Ready status under the Previous Reports heading.
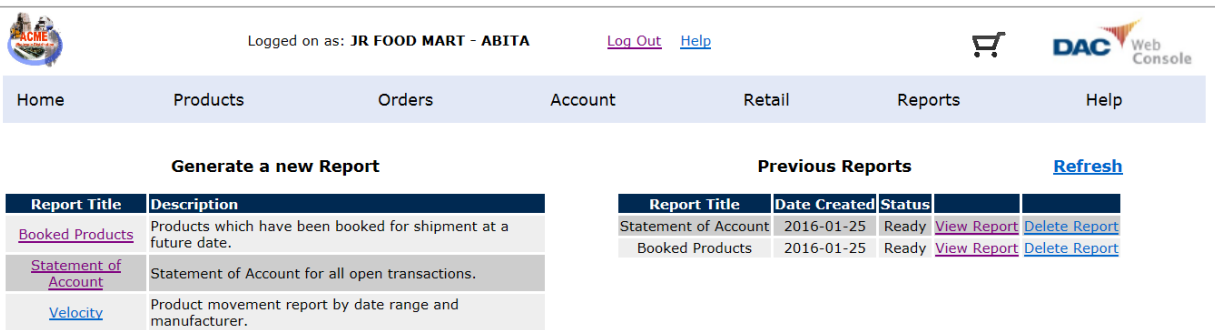
Click <u>View Report</u> to view and print the statement which appears as a PDF file.

Click the browser Back button to continue working with Web Console, or log out.

Viewing and Printing Invoices

Click Statement under Account on the Web Console menu bar.
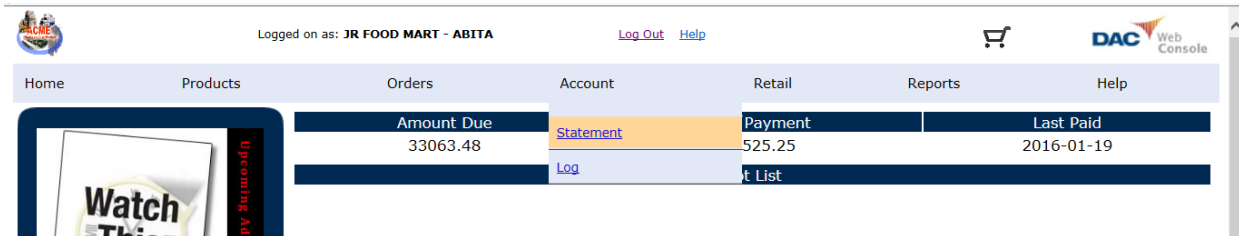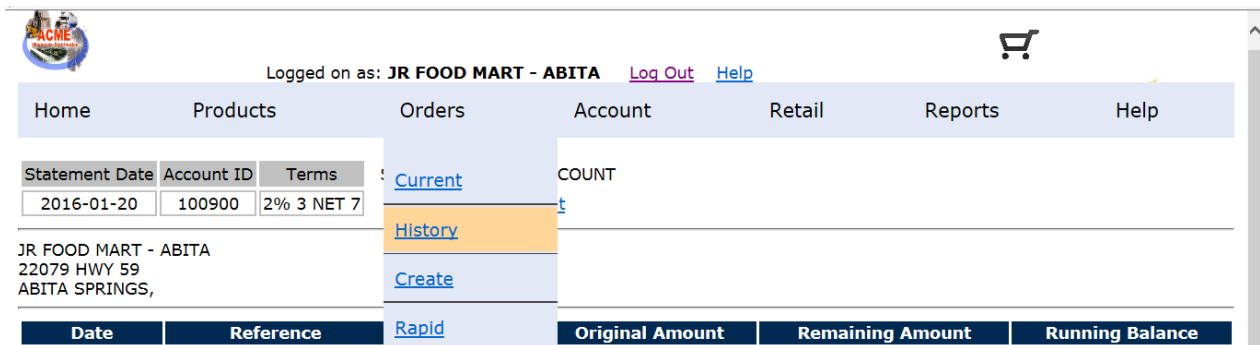
To view an invoice, click the order's reference number.

Date	Reference	Description	Original Amount	Remaining Amount	Running Balance
2015-12-29	101012 - 0015443	Invoice	$11525.25	$11525.25	$11525.25
2016-01-05	101019 - 0015483	Invoice	$11035.40	$11035.40	$22560.65
2016-01-12	101024 - 0015524	Invoice	$11035.05	$11035.05	$33595.70
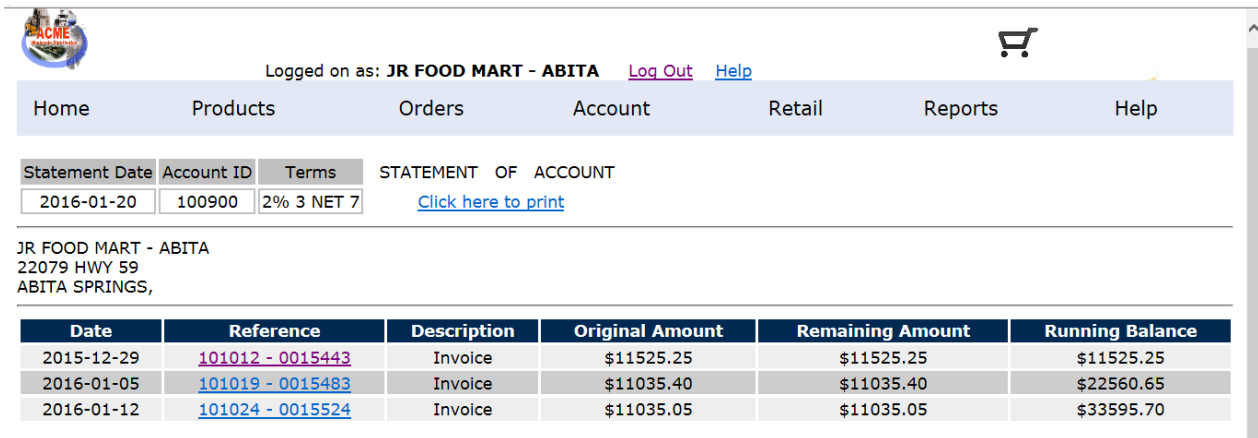
The "Web Copy" of the invoice, which appears in a new window, can be printed using your web browser's print command. With Internet Explorer, the Ctrl + P keyboard shortcut can be used to print the invoice.
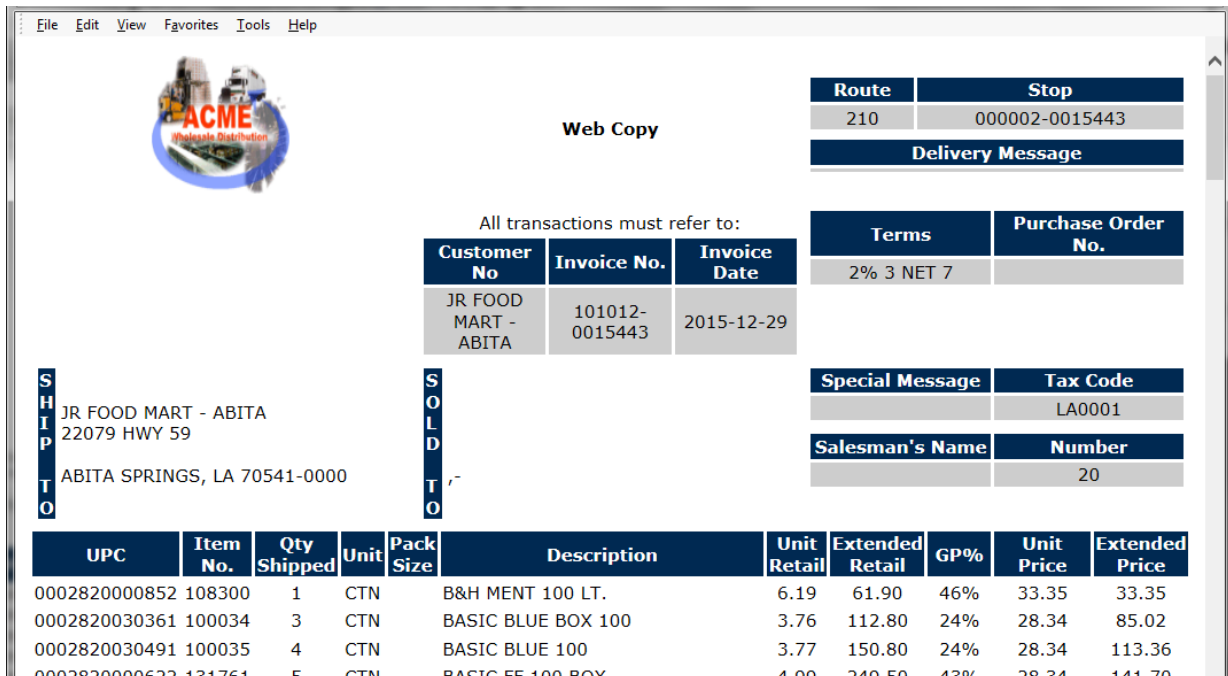
To view and print the invoice of a posted order in history, click <u>History</u> under Orders on the Web Console menu bar.

Click <u>View Invoice</u> after locating the posted order.
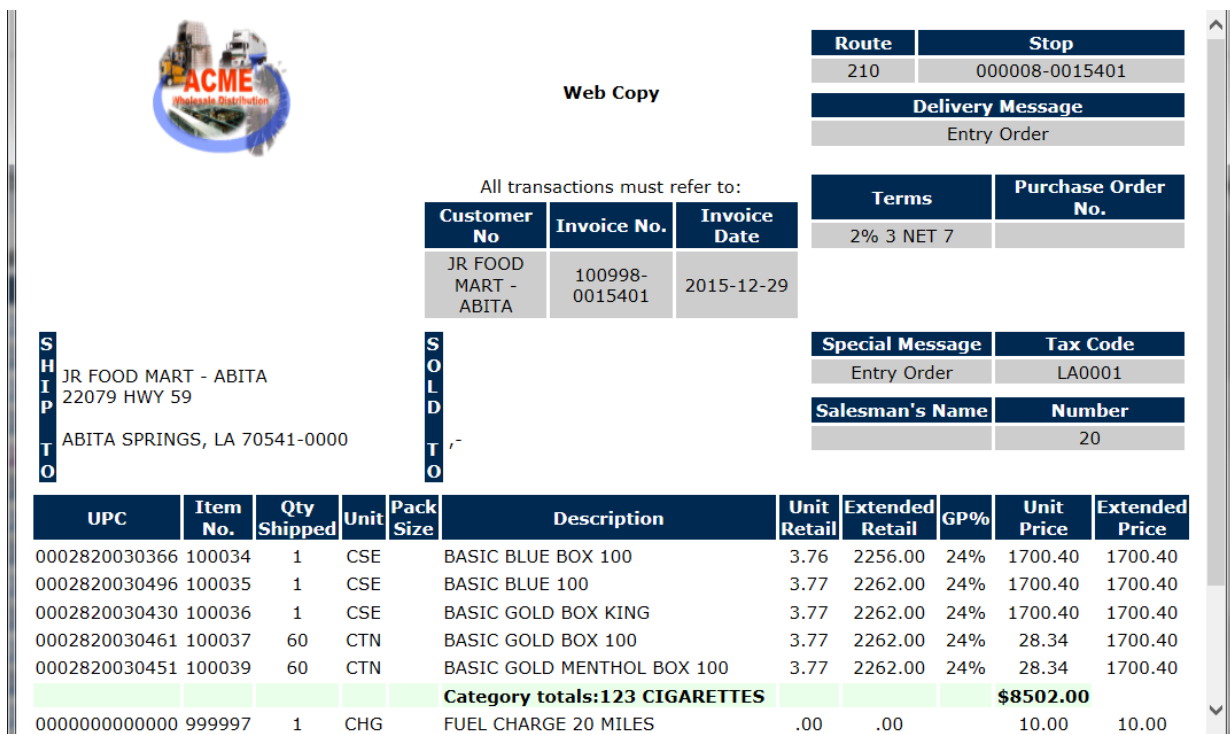
Order #		Purchase Order #	Type	Status	Description	Ship Date:	Total
101031 - 0015566	View Invoice		History	History		2016-01-19	10993.03
101024 - 0015524	View Invoice		History	History		2016-01-12	11035.05
101019 - 0015483	View Invoice		History	History		2016-01-05	11035.40
101012 - 0015443	View Invoice		History	History		2015-12-29	11525.25
100998 - 0015401	View Invoice		History	History	Entry Order	2015-12-29	8852.10
100994 - 0015387	View Invoice		History	History		2015-12-22	10730.32
100986 - 0015347	View Invoice		History	History		2015-12-15	10945.98

The following is a list of your historical orders:

The "Web Copy" of the invoice appears in a new window, and can be printed using your web browser's print command.

Route	Stop
210	000008-0015401

Web Copy

Delivery Message

Entry Order

All transactions must refer to:

Customer No	Invoice No.	Invoice Date
JR FOOD MART - ABITA	100998-0015401	2015-12-29

Terms	Purchase Order No.
2% 3 NET 7	

S H I P T O
JR FOOD MART - ABITA
22079 HWY 59

ABITA SPRINGS, LA 70541-0000

S O L D T O
,-

Special Message	Tax Code
Entry Order	LA0001

Salesman's Name	Number
	20

UPC	Item No.	Qty Shipped	Unit	Pack Size	Description	Unit Retail	Extended Retail	GP%	Unit Price	Extended Price
0002820030366	100034	1	CSE		BASIC BLUE BOX 100	3.76	2256.00	24%	1700.40	1700.40
0002820030496	100035	1	CSE		BASIC BLUE 100	3.77	2262.00	24%	1700.40	1700.40
0002820030430	100036	1	CSE		BASIC GOLD BOX KING	3.77	2262.00	24%	1700.40	1700.40
0002820030461	100037	60	CTN		BASIC GOLD BOX 100	3.77	2262.00	24%	28.34	1700.40
0002820030451	100039	60	CTN		BASIC GOLD MENTHOL BOX 100	3.77	2262.00	24%	28.34	1700.40
					Category totals:123 CIGARETTES				$8502.00	
0000000000000	999997	1	CHG		FUEL CHARGE 20 MILES	.00	.00		10.00	10.00

Viewing and Printing A Pre-book Items Report

Click <u>Report Manager</u> under Reports on the Web Console menu bar.
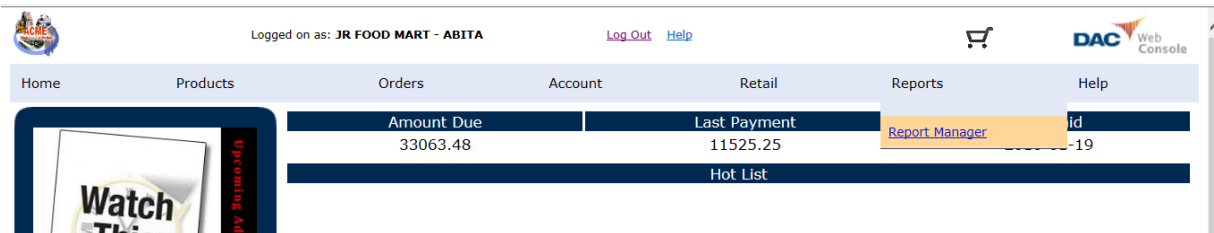
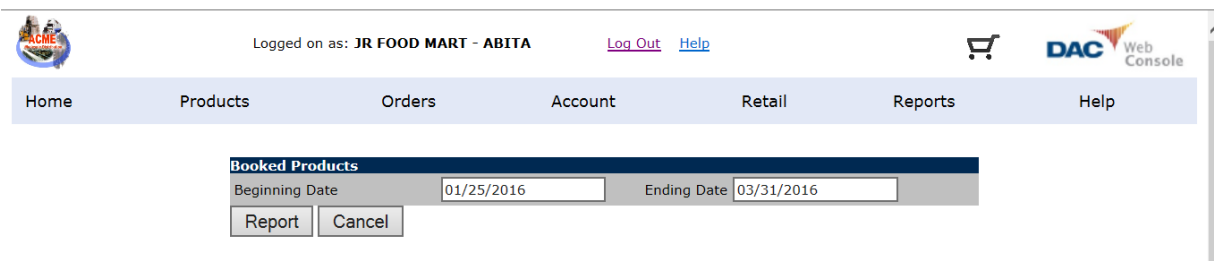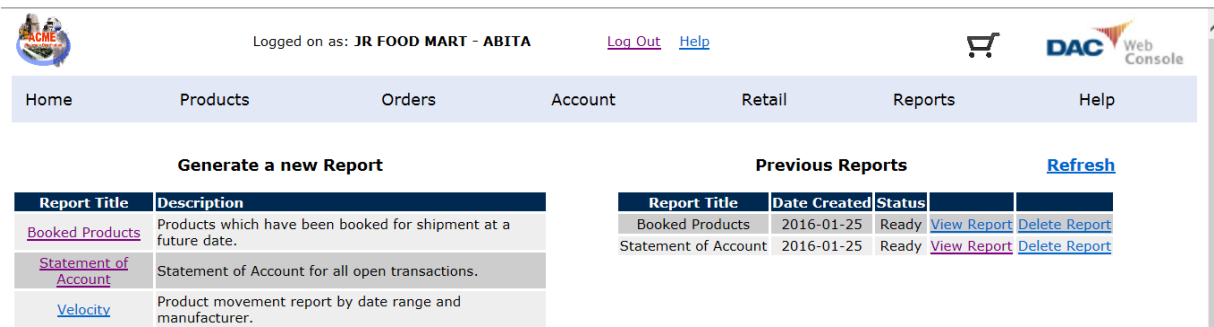**Click <u>Booked Products</u> under the Generate a new Report heading.**
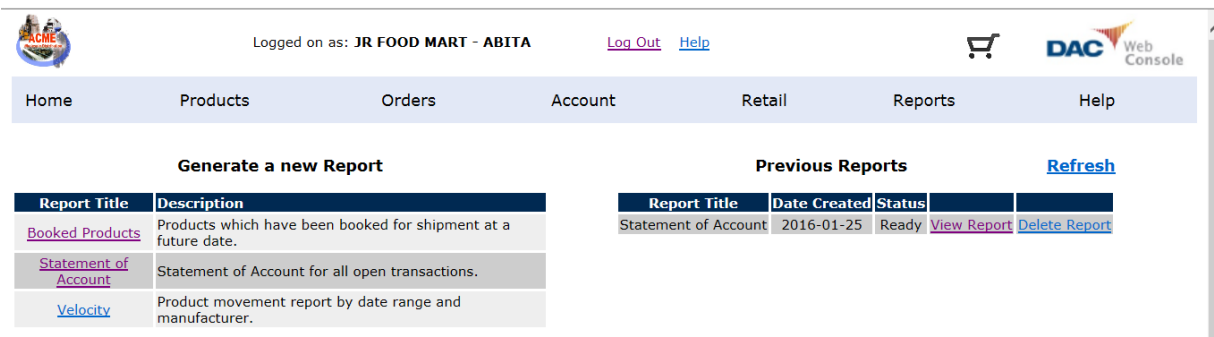
Enter the desired date range, and click the Report button.

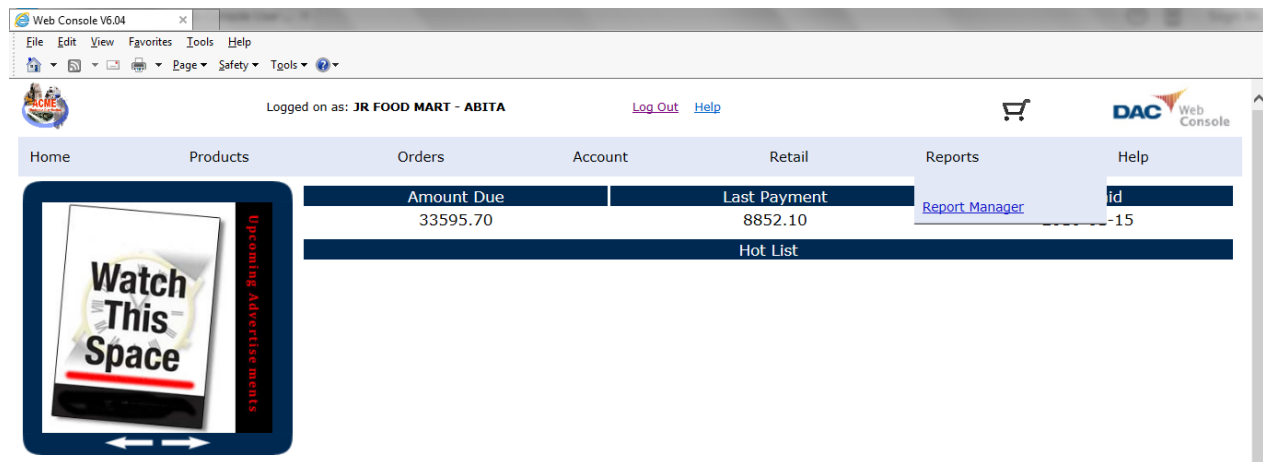**Click <u>Refresh</u> until the report appears with a Ready status under the Previous Reports heading.**

Click <u>View Report</u> to view and print the pre-book items report which appears as a PDF file.
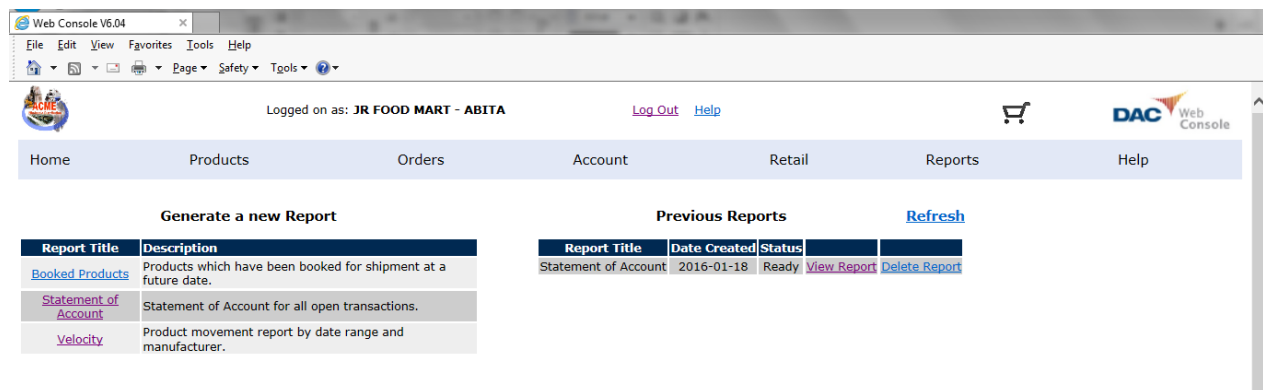
Click the browser Back button to continue working with Web Console, or log out.
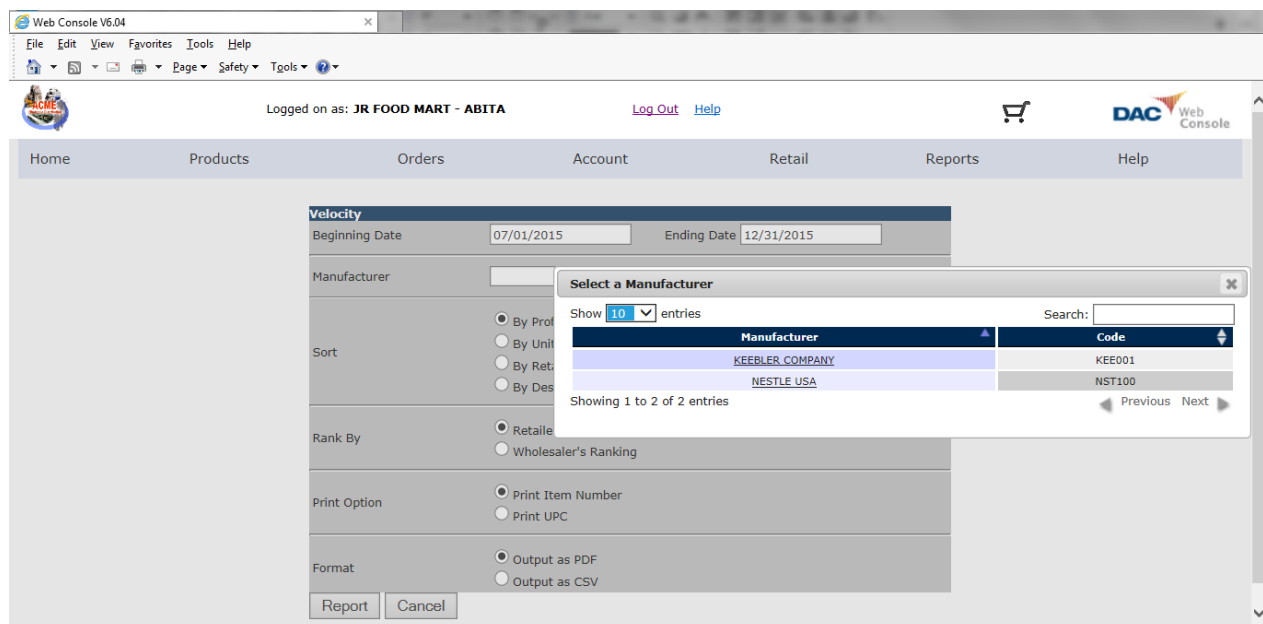
Printing A Velocity Report

Click <u>Report Manager</u> under Reports on the Web Console menu bar.

Click <u>Velocity</u> under the Generate a new Report heading.

Enter the desired date range, and click […] to select the manufacturer.

Select the desired option for each of the following:

- **Sort by profitability, units sold, retail dollars or description.**
- **Rank by retailer's ranking, or by wholesaler's ranking.**
- **Print item numbers or UPCs.**
- **Output as a PDF or CSV file.**

Click the Report button.

Click Refresh until the report appears with a Ready status under the Previous Reports heading.

Click View Report to work with the velocity report. If desired, click Delete Report to delete it.