



# Ai2

## **POET®**

# **Sales Rep Manual**

## **1.55+**

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INNOVATION AND TECHNOLOGY LEADERSHIP SINCE 1986



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## About the POET® Manual

This manual has been written specifically for your application as designed by your management. All of the screen layouts and functionally have been included, and where possible, usage techniques and tips have been included. We constantly strive to produce the best product available; however we know that errors can occur. If you find any errors in this manual, please contact your Access Administrator. We appreciate your comments regarding this product, and wish you well with its use

This manual's focus is on field use. To that end it is laid out in a 'logical use' fashion. That is, each step is followed by the next logical step that you would follow to enter an order. Sometimes a particular step may have many options or choices involved in it. In most cases we have focused on the most popular (logical) choice, and referenced you to more detail in a later section. This will allow you to quickly learn and be comfortable with the act of entering orders in POET®, and allow you to enhance your ordering process at your own speed.

### Table of Contents

The very first pages of this manual contain the Table of Contents. Please take time to review this section. Every area that pertains to your operation and entering orders is listed here. It will help you find something that you need to complete your orders, or to aid you in increasing your sales.

### Errors

We have tried to eliminate errors from the POET® system. However, no system is completely without errors, especially with today's complex operating systems and hardware. To that end we need your help in correcting and eliminating errors. If you get an error while working with the POET®, please contact your POET® Administrator immediately. Describe the error as best you can, including what error numbers are displayed, what you were doing when the error occurred, and what you can see on the screen behind the error (sometimes that helps more than the error number). Reporting errors in a timely manner allows us to correct them faster, and, by having the error reported and fixed, can often avoid an error cascade (bigger errors from small errors), or help your Access Administrator prevent the same error on another sales person's machine.

If you find an error in this documentation, please e-mail the page number and problem to [lep@ai2.com](mailto:lep@ai2.com).

### Thank You

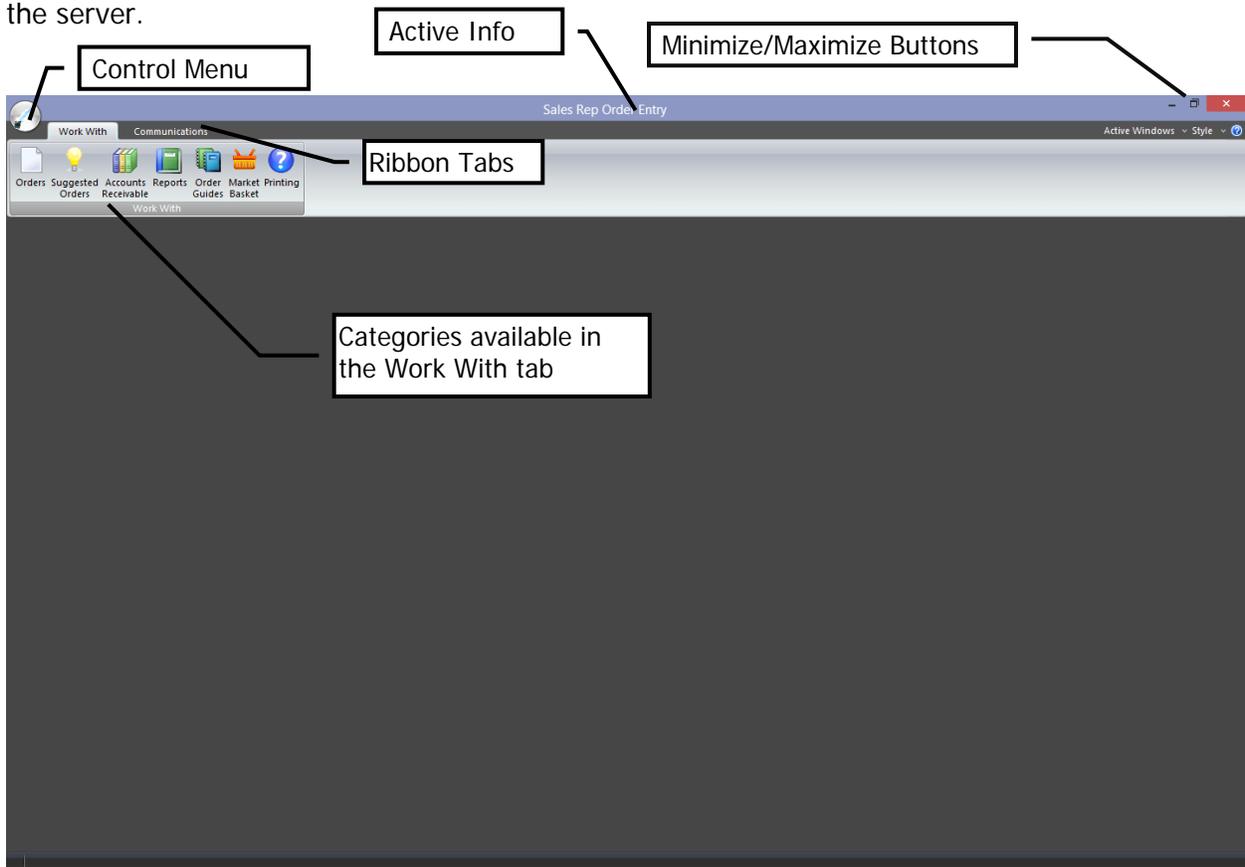
Ai2 would like to take this opportunity to thank you for using POET®. We hope that your experience is a good one.

# POET® Overview

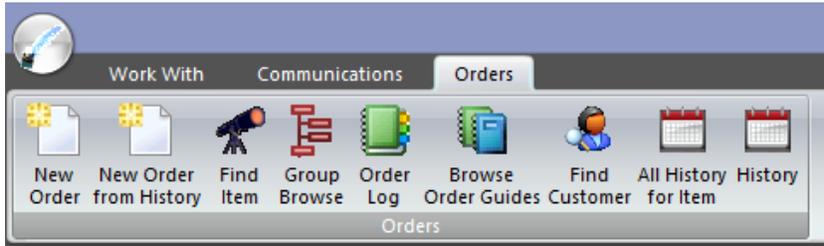
POET® is designed to help you work more efficiently. It provides an abundance of information about your customers, their products and prices, and many tools that will assist you in your daily responsibilities.

## The Main Application Window

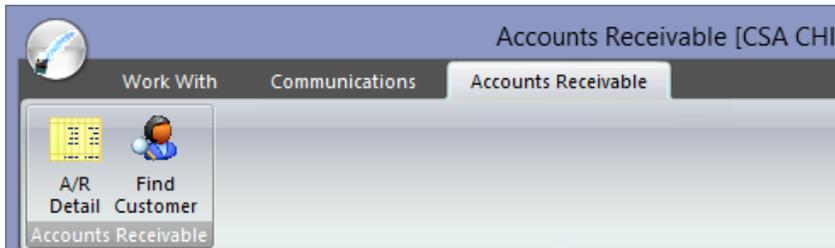
When you start POET®, you see a blank screen with a ribbon bar. The ribbon categories allow you to select the option of working with various aspects of the program or communicating with the server.



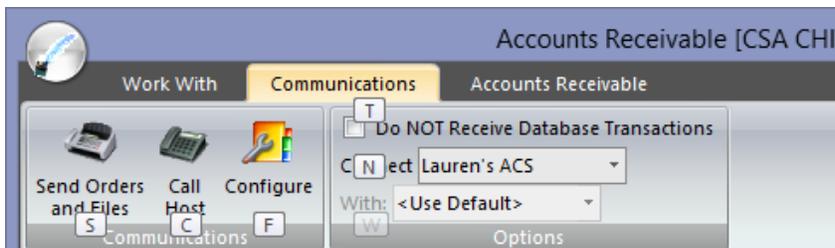
Once you select a category to work in, you will be presented with different panels that you can open, actions that you can take on those panels, and/or options on those actions.



The panel options for the Order tab



The panel options and actions for the Accounts Receivable tab



The panel options and setup options for the Communications tab

## Active Info

The title bar displays the Active Info. This includes the program name, the active customer if one is set, and the purchase order number or index number of the open order if there is one.

## Minimize/Maximize Buttons

Click the desired button to open the window to its largest size, allow the size to be adjusted, or hide the program without closing it. In general, POET® runs best when the Opening Screen is maximized. When it is maximized, the middle button looks like two overlapping boxes.



## Ribbon Categories

The Ribbon Tabs for Work With and Communications are always displayed. Click on the Work With tab to display the panels in the Work With category. When you select a panel, that tab also shows on the ribbon bar, and the categories in this tab are accessible. You can switch categories by clicking on the desired category.

## Category Panels

Each category has one or more panels that you can display by clicking on the icons that display when that category tab is clicked. You can open as many panels as you wish. If you switch categories, you will not see panels open in another category.

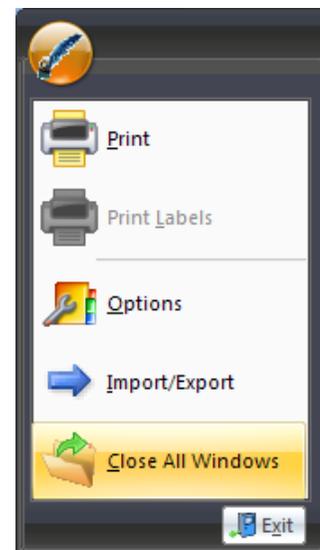
Item#	OrdQty	Pack & Size:	Type:	Brand:	Description:	Price	Portion \$
20085		6-2#	CSE	SUNRIS	BREAD CRANAPPLE#	30.30	
24600		24-7 OZ	CSE	BAKERB	BREAD SUB 12" WHITE BKD*	23.40	
24602		24-7 OZ	CSE	BAKERB	BREAD SUB 12" WHEAT BKD*	23.99	
24747		144-.50Z	CSE	BAKERB	DONUT MINI CINN SUGAR*	20.67	
24750		144-.50Z	CSE	BAKERB	DONUT MINI PUMPKIN*****	24.45	
24752		60-3 OZ	CSE	FMI	DONUT MINI CHOC 51% WG*#	18.95	
24754		60-3 OZ	CSE	FMI	DONUT MINI POWDER 51%WG*#	18.95	
24795		6-30 OZ	CSE	UDI'S	BREAD WHITE SLD GF#	64.65	
24797		6-30 OZ	CSE	UDI'S	BREAD WHEAT SLD GF#	64.60	
24798		6-28 OZ	CSE	BAKERB	BREAD WHITE TEX 1/2 SLD*	23.40	
24809		10-6 CT	CSE	BAKERB	BREAD BUN BRIOCHE 4**	35.90	
24815		24-18.5	CSE	BAKERB	BREAD DGH VIENNA*	30.99	
24840		8-16 OZ	CSE	RALCOR	BREAD GRAIN 8 EARL 5/8	27.99	
24892		96-3.75	CSE	GMILLS	PASTRY SCONE RASP WHT/CH#	83.35	
24894		64-2.50Z	CSE	PILLBY	CROISSANT BUTTER SLICED	68.35	
24895		96-3.75	CSE	GMILLS	PASTRY SCONE ORNG/CRANBY#	74.35	
24899		96-3.75	CSE	GMILLS	PASTRY SCONE VARIETY PAC#	90.35	

Total Items in Group: 555

Switch from panel to panel by clicking on the tab at the top of the panel. The tab that is in front of the others is the panel that is currently displayed. Above, we are looking at the Order Log.

The front tab has an **[x]** on the right-hand side. Clicking on this **[x]** closes the panel.

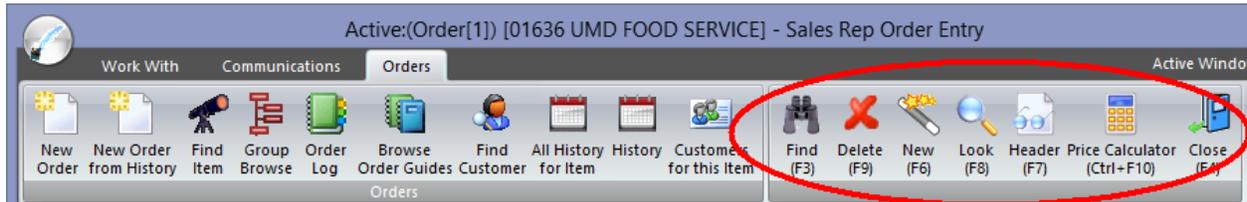
Clicking on the POET® icon displays an option to **Close All Windows**, which will close any open panel. If one of those panels is an open order, you will be prompted to save the order.



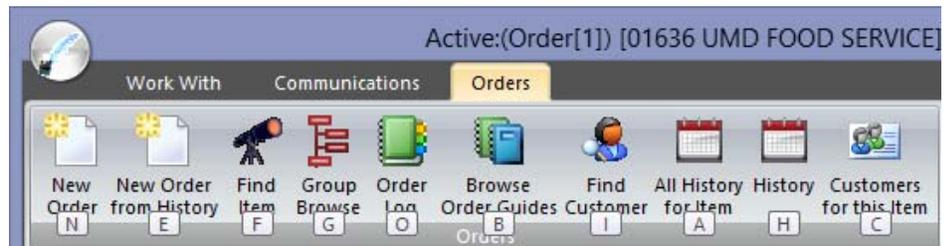
## Using the Keyboard

All of the functions of the ribbon can be accessed with keyboard commands. Some are special keystrokes that are assigned to frequently used actions.

For example, when in an order, to delete an item, you can click on the Delete icon or press **[F9]**, as indicated on the ribbon.

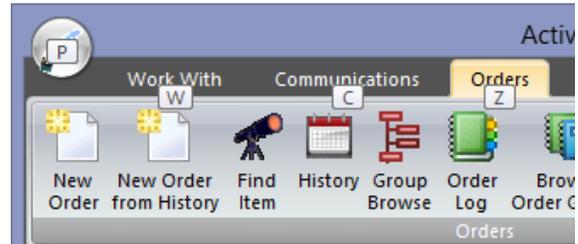


Icons not labeled with a single keystroke are accessible by a combination of keystrokes. Pressing the **[Alt]** button once displays a letter which will display that panel.



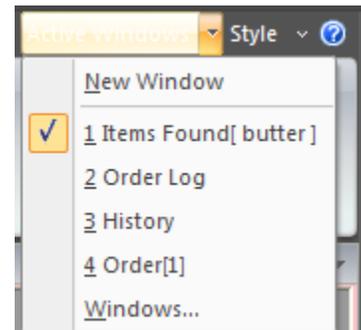
For example, pressing **[Alt][H]** opens the History browse.

Pressing **[Alt][Alt]** displays letters on the ribbon tabs which will allow you to switch to a different category.



You can use these keystrokes in combination. For example, if you are in the Communications category, you can press **[Alt][Alt][C]** to switch to the Communications tab and send your orders.

You can switch between open panels using the **Active Windows** option on the right side of the POET® program. **[Alt][Alt][T]** and the number of the desired panel will allow you to switch to that panel.



# Creating an Order

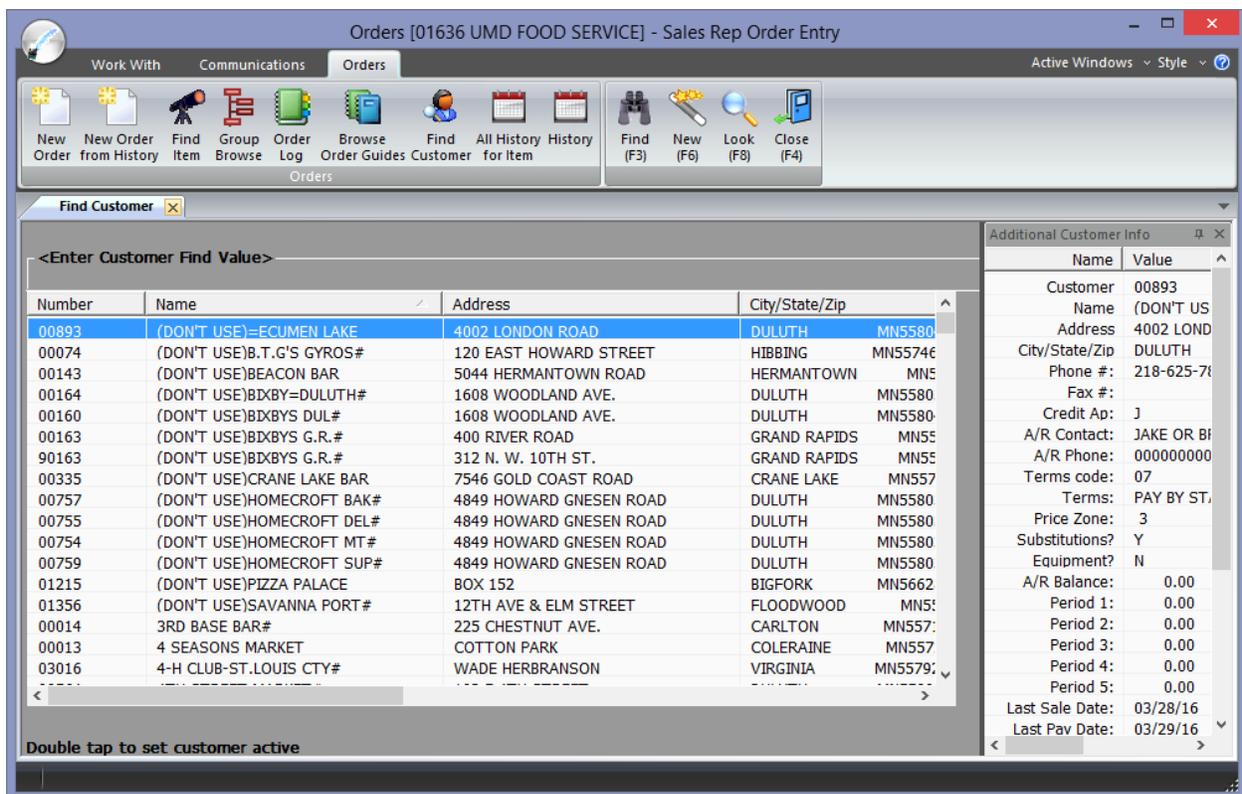
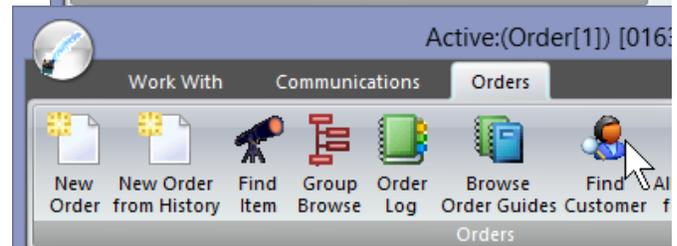
## Open the Order Section

If you are not already in the **Work With** tab, click on it in the ribbon. Then click on the **Orders** section.



## Select the Customer

If you need to change the customer, click on the **Find Customer** icon. This will display the Customer List.



POET® has a time saving feature. If you have a lot of customers, the customer list may display blank. You can display all of the customers by typing in a semi-colon ; and pressing **[Enter]**.

If the display takes too long, you will be offered the option to cancel the search. You can allow the search to proceed by simply ignoring this button. It will disappear when the search is complete. Alternatively, you can cancel the search by clicking the **[Cancel]** button, however, only the items already prepared for display will be shown.



The customer list is sorted by customer name. You can sort it by customer number (or any of the other fields) by clicking on the **Number** column heading. When you sort a column, a small triangle appears in the column heading. The direction of the arrow points to the smaller or lower value.

You can find a customer by moving up or down using the scroll bar. You can also type to find a customer.

Find Customer		
<Enter Customer Find Value>		
Number	Name	Address
00007	ALGONQUIN CLUB#	P.O.BOX
00012	AMELIA'S FAMILY CUISINE#	& CATER
00013	4 SEASONS MARKET	COTTON
00014	3RD BASE BAR#	225 CHE:
00015	ACCESS NORTH#	CENTER
00017	ALBORN TAVERN#	8506 SW
00018	ESSENTIA HEALTH HIBBING	730 E. 34
00019	ALDENS#	209 N. M
00020	ARCELORMITTAL USA LLC	5950 OLI
00021	AMERIPRIDE#	519 E 19
00022	AMERIPRISE FINANCIAL#	% PAT F
00024	AMERICAN LEGION=HIBBING#	P.O. BOX
00025	ANDERSON GROCERY STORE#	4513 HW
00026	AMERICAN LEGION=AURORA	117 NOR
00027	AMERICAN LEGION POST 22#	

## Finding a Customer

Above the list of customers is an entry field. Type part of the customer name or the customer number and press **[Enter]**. This will show you only those items that contain what you searched for.

Find Customer			
<Enter Customer Find Value>			
Number	Name	Address	City/State/Zip
00282	COMMUNITY ED=DEER RIVER#	101 1ST AVE N.E.	DEER RIVER
00477	DEER RIVER HIGH SCHOOL#	P.O. BOX 307	DEER RIVER
00483	DEER RIVER HLTH CARE CTR#	DBA: ESSENTIA HEALTH D.R.	DEER RIVER
90483	DEER RIVER HLTH CARE CTR#	115 10TH AVE NE	DEER RIVER
00479	DEER RIVER KING SCHOOL#	504 5TH ST. SE	DEER RIVER

If you wish to see all of the customers again, delete the find value and press **[Enter]**.

## Setting a Customer Active

Once you have located the desired customer, double-click it to set the customer active. Double-clicking the customer displays the Customer Information at the same time it changes the active customer.

The screenshot shows the 'Orders' window in the POET Sales Order Entry software. The 'Find Customer' window is open, displaying a list of customers. The customer '01161 PRAIRIE RIVER RETREAT#' is highlighted in blue. A callout box points to the 'Active customer is changed' message in the top right corner. Another callout box points to the 'Customer Information' window, which is docked on the right side of the screen. This window displays detailed information for the selected customer, including name, address, phone, and sales history.

Number	Name	Address	City/State/Zip	Phone	Total A/R	Last Sale Date	Rep	
00282	COMMUNITY ED=DEER RIVER#	101 1ST AVE N.E.	DEER RIVER	MN56636	000-000-0000	0.00	02/11/16	7
00477	DEER RIVER HIGH SCHOOL#	P.O. BOX 307	DEER RIVER	MN56636	218-246-8241	3,368.92	01/05/17	7
00483	DEER RIVER HLTH CARE CTR#	DBA: ESSENTIA HEALTH D.R.	DEER RIVER	MN56636	218-246-4360	229.16	01/05/17	7
90483	DEER RIVER HLTH CARE CTR#	115 10TH AVE NE	DEER RIVER	MN56636	218-246-3069	0.00	11/01/00	7
00479	DEER RIVER KING SCHOOL#	504 5TH ST. SE	DEER RIVER	MN56636	000-000-0000	531.73	12/08/16	7
00482	DEER RIVER NO. ELEMENTAR#	47658 CO RD 4	TALMOON	MN56636	000-000-0000	0.00	03/04/09	7
01161	PRAIRIE RIVER RETREAT#	51272 LAKE AVE	MCGREGOR	MN56700	218-246-0010	0.00	01/05/17	7
01302	RIVER COUNTRY LLC.	12804 W HWY 133	FLOODWOOD	MN55736	218-476-3555	0.00	12/08/16	1
01301	RIVER GRAND SR. LIVING#	355 RIVER ROAD	GRAND RAPIDS	MN55744	218-999-5333	367.84	01/03/17	7
01303	RIVER INN#	3212 RIVER GATE AVE	SCANLON	MN55720	218-879-2760	0.00	03/06/15	7
01295	RIVER ROAD MARKET#	302 S.E. 7TH AVE.	GRAND RAPIDS	MN55744	218-326-9104	0.00	12/23/16	7
01300	RIVERSIDE INN#	7477 HWY 5	SIDE LAKE	MN55781	000-254-2322	0.00	12/29/16	4
05136	RIVERSIDE SEAFOOD INC.				000-000-0000	0.00	01/01/00	1
01479	SUPER-1 #587 THIEF RIVER	1525 HWY 59 S.	THIEF RIVER FALLS	MN56701	218-681-2775	0.00	08/07/12	5
01665	VERMILLION RIVER TAVERN#	R R 3, BOX 25	BUYCK	MN55771	218-993-2246	184.00	01/04/17	6

**Customer Information**

This window is movable, and is shown in the docked position. For more information on moving windows, see page 65.

### Good Sales Rep Behavior

The Customer List is a very powerful tool for keeping on top of your customers' behavior. Periodically, while you are in your customer list, do the following sorts by clicking on these columns' headers:

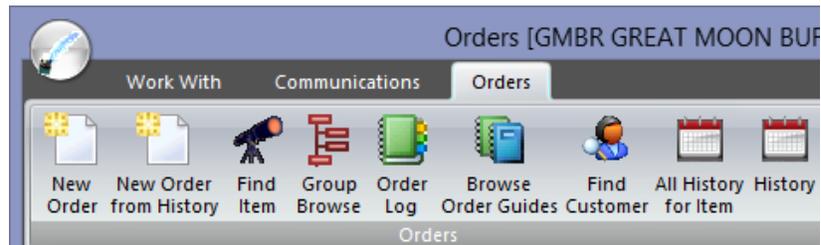
- By Total A/R, to see which customers owe money.
- By Last Sales Date, to see which accounts you may be losing to a competitor.
- By Credit Status, to see if any customers are on credit hold.

## Open the Order

There are two ways to open an order. You can open an order and pre-populate it with items from the customer's history. You can also open a blank order and then add items from the separate History browse (as well as other browses). Each has its advantages.



Click on the **New Order** or **New Order from History** icon to open an Order panel. The first thing that actually displays is the Order Header.



## The Order Header

Name	Value
CustRef	01161
Customer Name	PRAIRIE RIVER RETREAT#
Credit Status	
Scheduled Delivery Days	Thur,
<b>Current Delivery Date</b>	<b>01/19/17</b>
Use Override Delivery Date? Y or N	N
Override Delivery Date	01/18/17
PO #	
A/R Balance	.00
Period 1	.00
Period 2	.00
Period 3	.00
Period 4	.00
Period 5	.00
Credit Hold	
Override Credit Hold? Y or N	
Default Instructions	?[]
Special Instructions	
1=Pick 2=Inv 3=Both	3
Order Type	NORMAL ORDER

### Entry field

In the Header, the **Current Delivery Date** field is highlighted, so the entry field is asking for a date.

The Order Header has several editable areas. The entry field will change type depending on what sort of information the selected area requires.

### Use Override Delivery Date, Override Delivery Date

– The Current Delivery Day defaults to the next delivery day, based on the customer's delivery schedule. (This customer is routed on Thursday. 1/19/17 is the next Thursday.) To override the scheduled delivery day, first select the option to **Use Override Delivery Date** and change the value to **Y**. Then move to **Override Delivery Date** and click on the dropdown arrow to display a calendar. Select from a list of days.

**Override Credit Hold? Y or N** – You cannot create an order for a customer that is on Credit Hold. If the **Credit Status** field indicates that the customer is on Credit Hold, and you want to place an order anyway, change this value to **Y**.

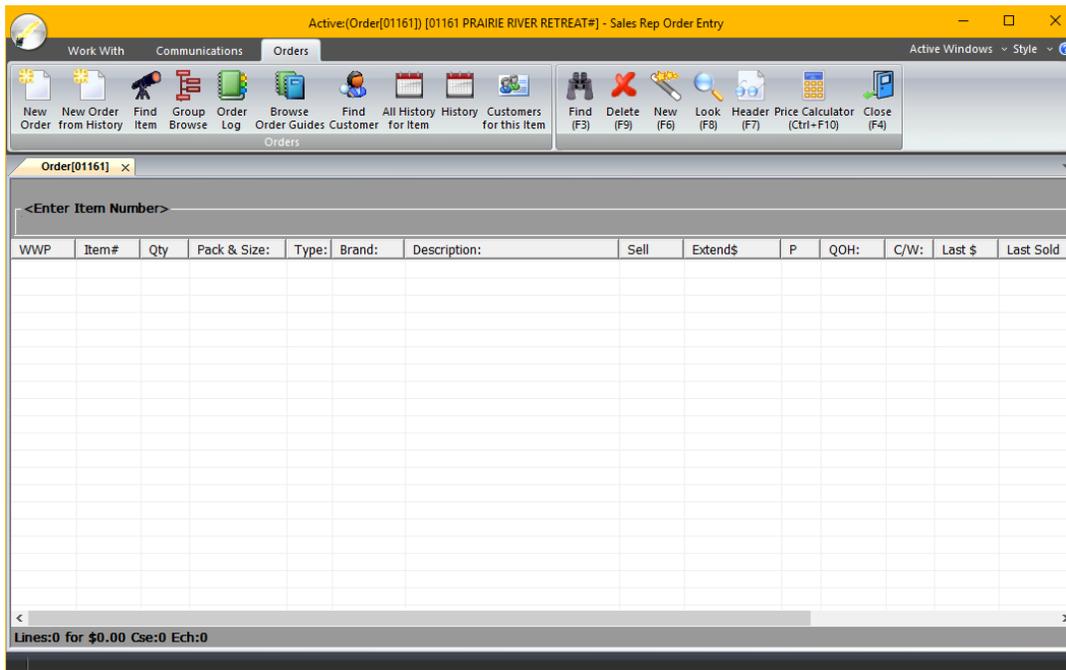
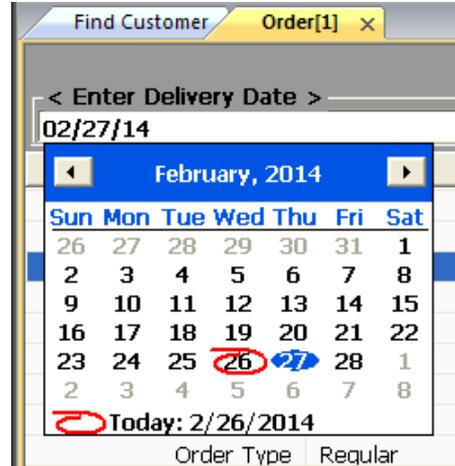
**Special Instructions** – You can create a special instruction that can be printed on the invoice, the pick ticket, or both. Below that, select **1** to send the Special Instruction to the Pick Ticket, **2** to send it to the invoice, and **3** to send it to both. The default is 3, both.

When you are finished making changes, close the Order Header tab and proceed to the Order panel. You can return to the Order Header at any time by clicking on the Header action or pressing **[F7]**.



### A New Order

If you selected to start your order from a New Order, the order that opens is blank. The entry field asks you to **Enter Item Number**.



You can now begin adding items by typing in the item number. After you type the item number, press Enter.

Order[01161] x

<Enter Item Number>  
26255

WWP	Item#	Qty	Pack & Size:	Type:	Brand:	Description:	Sell	Extend\$	P	QOH:	C/W:	Last \$	Last Sold

The item is added to the order, and the entry field now asks you to **Enter Order Quantity**.

Order[01161] x

<Enter Order Quantity>  
1

WWP	Item#	Qty	Pack & Size:	Type:	Brand:	Description:	Sell	Extend\$	P	QOH:	C/W:	Last \$	Last Sold
	26255	1	45-4 OZ	CSE	ORIGIN	BAGEL CHOC CHIP 45120*	15.65		Z	5			

Notice that the entry field already has a quantity of 1, and it is highlighted. Set up this way, you can just press Enter if you want to sell one item. Because it is highlighted, you don't have to delete the 1 to change the quantity. Just type a new quantity and press Enter. You can also set POET® to not pre-enter a 1. For more information, see Entry Options, page 68.

When you press Enter, the cursor bar moves to the next line and you are prompted again for an item number. Continue entering item numbers and quantities until you need to search for something or the order is finished.

Order[01161] x

<Enter Order Quantity>  
1

WWP	Item#	Qty	Pack & Size:	Type:	Brand:	Description:	Sell	Extend\$	P	QOH:	C/W:	Last \$	Last Sold
	26255	1	45-4 OZ	CSE	ORIGIN	BAGEL CHOC CHIP 45120*	15.65	15.65	Z	5			
	56285	2	4-1 LT	CSE	MONIN	SYRUP CUCUMBER#	34.90	69.80	Z	1			
	9100	1	1-25#	CSE	RUSS	PROD ONION RED (PURPLE)*	16.70	16.70	Z	1			
	85030	1	30-1CT	CSE	PACBLU	TOWEL PAPER 85-2PLY	28.95	28.95	Z	9			

## An Order from History

If you selected to start your order from a New Order from History, the order that opens is prepopulated with items from the customer's history.

WWP	Item#	Qty	Pack & Size:	Type:	Brand:	Description:	Sell	Extend\$	P	QOH:	C/W:	Last \$	L
1	88888				FRABON	* AA SERVICE FEE *	4.00		Z	803		4.00	0
1	25047		6-12 CT	CSE	GOLDEN	BREAD KAISER BUN SLC 4**	28.92		B	36		28.92	0
3	37391		1-#10	CAN	GEHL'S	CHEESE SAUCE CHED MILD	8.30		Z	77		8.30	1
2	58515		6-1#	CSE	UNCLER	CHIP PLAIN RIPPLE BULK	14.65		Z	13		14.65	1
3	57600		4-1 GAL	CSE	LITEHO	DRESS SALAD DRESS H/D*	39.39		B	17		39.39	1
1	59108		1-35#	JUG	VENTUR	OIL CLEAR LIQD FRY 0-TRA	21.22		B	255		19.95	0
3	59100		1-35#	JUG	VENTUR	OIL CREAMY LIQUID FRY AV	19.94		B	190		19.95	1
2	19800		2-5#	CSE	MARGAR	PEPPERONI SLICED 14-16OZ	31.19		B	69		31.19	1
1	56915		1-5 GAL	TUB	SHWRTZ	PICKLE DILL KOS1/4" SLSMO	40.85		Z	20		40.85	0
1	56950		1-5 GAL	TUB	SHWRTZ	PICKLE SPEAR KOSHER 300CT	35.92		B	14		35.92	0
2	25218		80-6.25	CSE	BONICI	PIZZA CRUST D/C THIN 12	48.70		Z	7		48.70	1
3	25263		40-12 OZ	CSE	BONICI	PIZZA CRUST D/C THIN 16"	42.75		Z	3		42.75	1
1	45069		6-4.5#	CSE	CLASIC	POTATO FRY C/C 5/16*	14.20		Z	192		14.20	0
3	9039		1-5#	BAG	BIX	PROD CABB SHRED 1/4*#	9.10		Z			9.10	1
2	9078		1-5#	BAG	BIX	PROD LETTUCE SHRED 1/8"*#	6.70		Z			6.70	1
2	9204		1-5#	CSE	BIX	PROD MUSHROOM SLICED#	15.25		Z	1		15.25	1
2	9131		1-5#	BAG	RUSS	PROD TOMATO 5 LB	7.20		Z	9		7.15	1
1	2509		6-5#	CSE	FRABON	SAUSAGE BULK HOT 6-5 LB	89.36		B	1		89.36	0
2	32743		1-5#	TUB	WESTBY	SOUR CREAM 1/5 LB*	10.85		Z	21		10.85	1
1	91087		1-28OZ	TUB	FRABON	SPICE STEAK SEASONING*	16.30		Z	51		16.30	0

You can scroll up and down to locate items or use the Progressive Find or Progressive Filter features to search for items. Note that the entry field says "Enter Order Quantity." When you find an item that the customer wants to purchase, enter a quantity and press Enter. You can also double-click on the Qty field for that item. Each double-click increments the quantity.

## Adding Item Numbers

Unlike in a blank order, the entry field is not going to ask for an item number, because you are sitting on an item, not a blank line. If you need to add a new item and you know the item number, you have to get the entry field to ask for an item number. If there are few enough items, you can click on a blank line at the bottom of the order.

You can also click on the **New** button in the right-hand section. This will change the entry field to **Enter Item Number**. You can enter an item number, and it will be added to the bottom of the list of items.



An easy way to work through a smaller history is to use the Enter key to move from line to line and when you get to an item that you want to sell, change the quantity and press Enter. If your history contains more items, you may want to use Progressive Find or Progressive Filter to find items.

## Progressive Find

Progressive Find allows you to type an item description. As you type, the cursor bar jumps from item to item to find the first item that matches your typed description. To start Progressive Find, click on the Find button in the right-hand section or press **[F3]**. This will change your entry field to ask you to **Enter Progressive Find Value**.



Type in something that would appear in the brand or description and press **[Enter]**. The cursor will move to the first item that matches your Find Value. If this is not the one you want, press **[Enter]** until you find the desired item. Let's say you want to find "Steak Seasoning". Begin typing: "ste..."

The screenshot shows a software window titled "Order[01161]" with a table of items. The table has columns: WWP, Item#, Qty, Pack & Size, Type, Brand, Description, Sell, Extend\$, P, and Q. The items listed include various food products like "AA SERVICE FEE", "BREAD KAISER BUN", "CHEESE SAUCE", "CHIP PLAIN RIPPLE BULK", "DRESS SALAD", "OIL CLEAR LIQD FRY", "OIL CREAMY LIQUID FRY", "PEPPERONI SLICED", "PICKLE DILL KOS1/4", "PICKLE SPEAR KOSHER", "PIZZA CRUST", "PIZZA CRUST D/C THIN 12", "PIZZA CRUST D/C THIN 16", "POTATO FRY", "PROD CABB SHRED", "PROD LETTUCE SHRED", "PROD MUSHROOM SLICED", "PROD TOMATO 5 LB", "SAUSAGE BULK HOT", "SOUR CREAM 1/5 LB", and "SPICE STEAK SEASONING".

Three callout boxes provide instructions:

- Stay on first item. SERVICE**: Points to the first item in the list.
- Moves to first PIZZA CRUST.**: Points to the first item with "PIZZA CRUST" in the description.
- We found the STEAK SEASONING.**: Points to the item "SPICE STEAK SEASONING" which is highlighted in blue.

At the bottom of the window, it says "Lines:20 for \$0.00 Cse:0 Ech:0".

Sometimes you find an item that matches what you've typed but isn't what you're looking for. For example, if you are looking for "Spice Onion Powder," you might come to "Aptz Onion Ring" first. You can keep typing: "Onion Powder." You can also press **Enter**. Enter will jump from something that matches what you've typed to the next thing.

For example, in the screen above, typing "cream" will take you to 59100, "Oil Creamy Liquid Fry 0-Tra." If you press **[Enter]**, it will take you to 32743, "Sour Cream 1/5 LB\*"

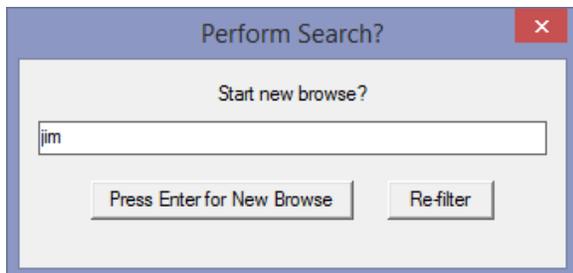
## Progressive Filter

The Progressive Filter works similarly to the Progressive Find, except that it hides the items that don't match what you type instead of jumping from item to item that does match. POET® knows that a quantity is a number. So if it's asking for a quantity in the entry field and you start typing words, it does a Progressive Filter.

WWP	Item#	Qty	Pack & Size:	Type:	Brand:	Description:	Sell	Extend\$	P	QOH:	C/W:	Last \$	L
3	59100		1-35#	JUG	VENTUR	OIL CREAMY LIQUID FRY AV	19.94		B	190		19.95	1
2	32743		1-5#	TUB	WESTBY	SOUR CREAM 1/5 LB*	10.85		Z	21		10.85	1

To display all the items again, press **[Esc]**.

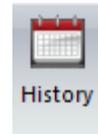
If none of the items match your search, you will get a **Perform Search?** popup. This can happen when no such items are part of your history, or it may happen because you've mistyped, such as spelling "cranberry" with "cram."



If you've mistyped, you can edit your search term and **Re-filter**, which will apply the corrected search term to the History window. You can also **Press Enter for New Browse**, which will open a Product Catalog window looking for your search term.

## Browsing for Items in History

The History Browse is a list of items that the customer has purchased. If you've opened a New Order, the history window is your primary source of items to order. Even if you've opened the New Order from History, there is information in the History browse that you might want to look at. Like other browses, the History Browse has a quantity column. When you change the quantity on an item in the browse, if you have an order open, the item is added to the order.



Description	Sell	Sell Ref	Portion \$	Last Sold	Last \$	Change	01/15	01/08	01/01	12/25	12/18	12/11	P
SAUSAGE BULK HOT 6-5 LB	89.36	89.36	2.978	01/05/2017	89.36				1				
PROD CABB SHRED 1/4*#	9.10	9.10	0.113	12/22/2016	9.10						1		
PROD LETTUCE SHRED 1/8*#	6.70	6.70		12/29/2016	6.70					1			
PROD TOMATO 5 LB	7.20	7.20	1.440	12/29/2016	7.15	+				1	1		
PROD MUSHROOM SLICED#	15.25	15.25	0.190	12/29/2016	15.25					1			
PEPPERONI SLICED 14-16OZ	31.19	31.19	0.194	12/29/2016	31.19					1			
BREAD KAISER BUN SLC 4**	28.92	28.92	0.401	01/05/2017	28.92				1	1			
PIZZA CRUST D/C THIN 12	48.70	48.70	0.608	12/29/2016	48.70					1			
PIZZA CRUST D/C THIN 16"	42.75	42.75	1.068	12/22/2016	42.75						1		
SOUR CREAM 1/5 LB*	10.85	10.85	0.135	12/29/2016	10.85						1		
CHEESE SAUCE CHED MILD	8.30	8.30	0.077	12/22/2016									
POTATO FRY C/C 5/16*	14.20	14.20	0.032	01/05/2017									
PICKLE DILL KOS1/4" SLSMO	40.85	40.85	8.170	01/05/2017									
PICKLE SPEAR KOSHER 300CT	35.92	35.92	0.119	01/05/2017									
DRESS SALAD DRESS H/D*	39.39	39.39	9.847	12/22/2016									
CHIP PLAIN RIPPLE BULK	14.65	14.65	0.152	12/29/2016									
OIL CREAMY LIQUID FRY AV	19.94	19.94	0.569	12/22/2016									
OIL CLEAR LIQD FRY 0-TRA	21.22	21.22	0.606	01/05/2017									
* AA SERVICE FEE *	4.00	4.00		01/05/2017									
SPICE STEAK SEASONING*	16.30	16.30	0.582	01/05/2017									

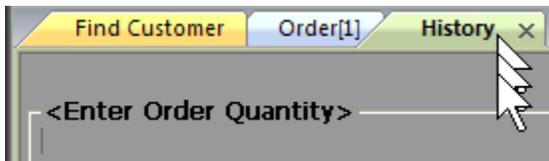
  

	03/13	03/06	02/28	02/21	02/14	02/07
	1			1		
	1	1		2	1	1
	5	3	4	5	3	4
	5	2	4	3	5	4
	3	1		1		3
	1		1		1	

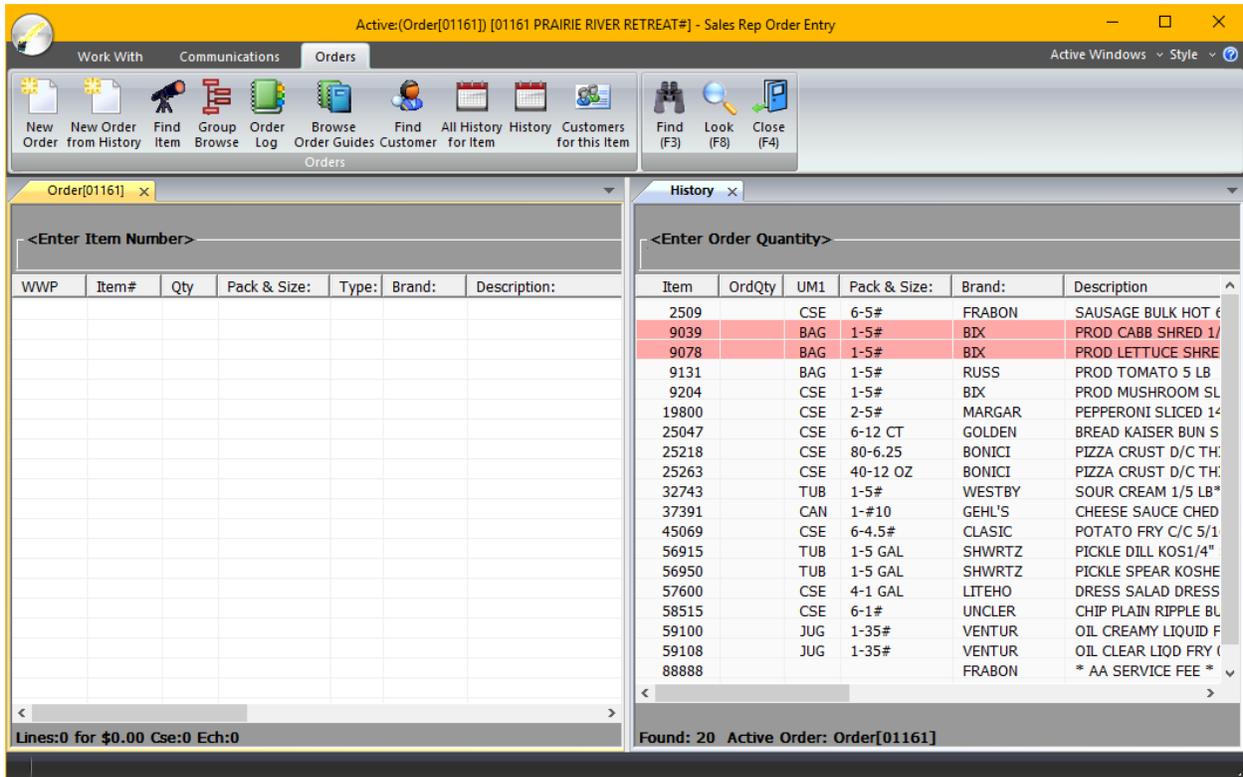
Scroll to the right to see columns that show the customer's purchase history over the last six weeks. The date shown is the Sunday that starts the week. The actual date of the most recent sale is in the **Last Sold** column.

## Display History Beside the Order

It is possible to see the history and the order at the same time, side by side. Move the mouse to the History tab. Click-and-hold, and drag downward.



The mouse pointer will change to look like it's dragging a piece of paper. When you let go, the order and the history will be displayed side by side.

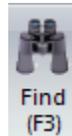


As you enter quantities in the OrdQty column in the History tab on the right, the items show up in the order on the left, in the order in which you change the quantities.

You can adjust the amount of space in each tab by dragging the middle bar to the left or right. To display the windows tabbed instead of side by side, click-and-drag the History tab to the left.

### Progressive Find

Progressive Find that was introduced on page 13, also works in the History and other browses. To start Progressive Find, click on the Find button in the right-hand section or press **[F3]**. This will change your entry field to ask you to **Enter Progressive Find Value**.



Type in something that would appear in the brand or description and press **[Enter]**. The cursor will move to the first item that matches your Find Value. If this is not the one you want, press **[Enter]** until you find the desired item.

Order[01161] x

<Enter Order Quantity>

WWP	Item#	Qty	Pack & Size:	Type:	Brand:	Description:	Sell	Extend\$	P	Q
1	88888				FRABON	* AA SERVICE FEE *		4.00	Z	
1	25047		6-12 CT	CSE	GOLDEN	BREAD KAISER BUN SLC 4**		28.92	B	
3	37391		1-#10	CAN	GEHL'S	CHEESE SAUCE CHED MILD		8.30	Z	77
2	58515		6-1#	CSE	UNCLE	CHIP PLAIN RIPPLE BULK		14.65	Z	13
3	57600		4-1 GAL	CSE	LITEHO	DRESS SALAD DRESS H/D*		39.39	B	
1	59108		1-35#	JUG	VENTUR	OIL CLEAR LIQD FRY 0-TRA		21.22	B	
3	59100		1-35#	JUG	VENTUR	OIL CREAMY LIQUID FRY AV		19.94	B	
2	19800		2-5#	CSE	MARGAR	PEPPERONI SLICED 14-16OZ		31.19	B	
1	56915		1-5 GAL	TUB	SHWRTZ	PICKLE DILL KOS1/4" SLSMO		40.85	Z	
1	56950		1-5 GAL	TUB	SHWRTZ	PICKLE SPEAR KOSHER 300CT		35.92	B	14
2	25218		80-6.25	CSE	BONICI	PIZZA CRUST D/C THIN 12		48.70	Z	7
3	25263		40-12 OZ	CSE	BONICI	PIZZA CRUST D/C THIN 16"		42.75	Z	3
1	45069		6-4.5#	CSE	CLASIC	POTATO FRY C/C 5/16*		14.20	Z	192
3	9039		1-5#	BAG	BIX	PROD CABB SHRED 1/4*#		9.10	Z	
2	9078		1-5#	BAG	BIX	PROD LETTUCE SHRED 1/8**#		6.70	Z	
2	9204		1-5#	CSE	BIX	PROD MUSHROOM SLICED#		15.25	Z	
2	9131		1-5#	BAG	RUSS	PROD TOMATO 5 LB		7.20	Z	
1	2509		6-5#	CSE	FRABON	SAUSAGE BULK HOT 6-5 LB		89.36	B	
2	32743		1-5#	TUB	WESTBY	SOUR CREAM 1/5 LB*		10.85	Z	
1	91087		1-28OZ	TUB	FRABON	SPICE STEAK SEASONING*		16.30	Z	51

Lines:20 for \$0.00 Cse:0 Ech:0

Stay on first item. SERVICE

Moves to first PIZZA CRUST.

We found the STEAK SEASONING.

### Progressive Filter

Progressive Filter also works in browses like History. Type a word in the quantity field and you will start the Progressive Filter.

start typing words, it does a Progressive Filter.

Active:Order[01161] [01161] P Entry

Work With Communications Orders

New Order from History Find Item Group Browse Order Log Browse Order Guides Customer for Item Find All History History Customers for this Item Find Delete New Look Header Price Calculator Close (F3) (F9) (F6) (F8) (F7) (Ctrl-F10) (F4)

Order[01161] x

<Enter Order Quantity>

WWP	Item#	Qty	Pack & Size:	Type:	Brand:	Description:	Sell	Extend\$	P	QOH:	C/W:	Last \$	L
3	59100		1-35#	JUG	VENTUR	OIL CREAMY LIQUID FRY AV		19.94	B	190		19.95	1
2	32743		1-5#	TUB	WESTBY	SOUR CREAM 1/5 LB*		10.85	Z	21		10.85	1

Lines:20 for \$0.00 Cse:0 Ech:0

cre

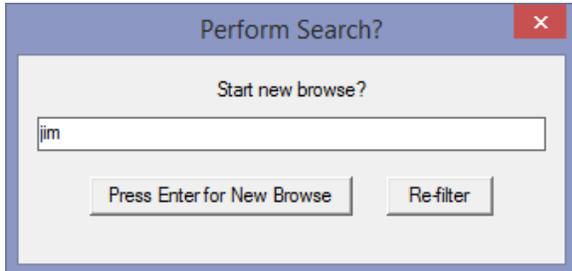
The program wants a quantity.

Typing letters indicates you want to **Filter** the items.

All items besides ones that match the search terms are hidden.

To display all the items again, press **[Esc]**.

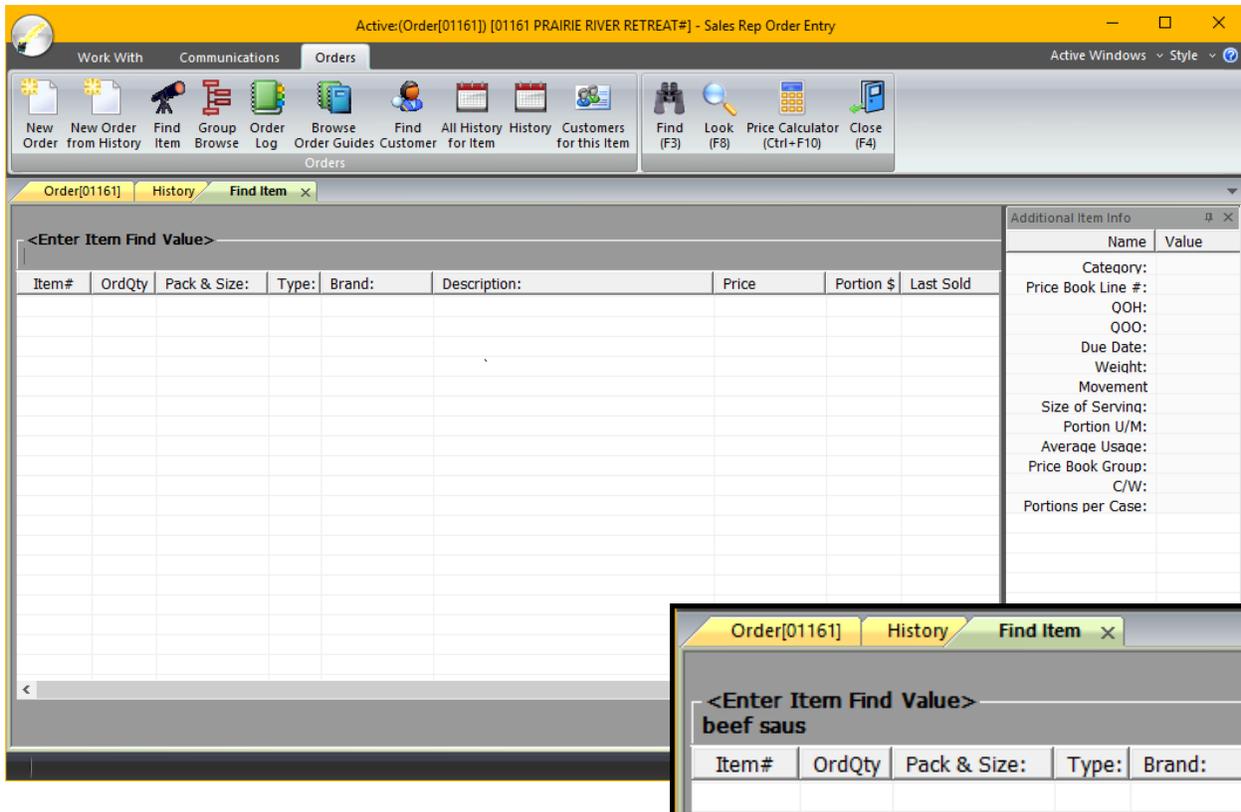
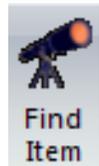
If none of the items match your search, you will get a **Perform Search?** popup. This can happen when no such items are part of your history, or it may happen because you've mistyped, such as spelling "cranberry" with "cram."



If you've mistyped, you can edit your search term and **Re-filter**, which will apply the corrected search term to the History window. You can also **Press Enter for New Browse**, which will open a Product Catalog window looking for your search term.

## Browsing for Items in the Product Catalog

To find an item in the Product Catalog, click on the **Find Item** icon. This will display the **Find Item** panel. Because of the number of products, this will most likely display as a blank panel. Again, you can view all items by typing a semicolon ; and pressing **[Enter]**.



To find an item, type a word that might appear in the item description. Please note that POET® searches for exact matches. In some places, bratwurst is spelled "BRATWURST" and in others it is abbreviated "BRAT" or "BRT." Searching for one term will not find items described with the other term. Searching for "SAUSAGE BR" will find all three. You need to understand your product descriptions.

When you press **[Enter]**, only those items that match the entry field will display.

Active:Order[01161] [01161 PRAIRIE RIVER RETREAT#] - Sales Rep Order Entry

Work With Communications Orders

Items Found[ sausage br ]

Item#	OrdQty	Pack & Size:	Type:	Brand:	Description:	Price	Portion \$	Last Sold
1180		2-5#	CSE	TRES	SAUSAGE CRUMBLES BRKF FC	34.80		
1675		12-1#	CSE	FRABON	SAUSAGE BRAT W/KRAUT RTL#	58.19		
1676		1-1#	PCE	FRABON	SAUSAGE BRAT W/KRAUT RTL#	5.28		
1905		1-6#	BOX	FRABON	SAUSAGE BREAKFAST 16/1#	24.50		
1924		6-5#	CSE	FRABON	SAUSAGE BULK BRKFST 6-5	85.80		
1925		1-5#	RND	FRABON	SAUSAGE BULK BRKFST 1-5	14.30		
1965		12-1#	CSE	FRABON	SAUSAGE CHIX BRAT W/R	57.05		
1966		1-1#	PCE	FRABON	SAUSAGE CHIX BRAT W/R	5.25		
2080		16-12 OZ	CSE	FRABON	SAUSAGE BULK BRKFST 12OZ	45.55		
2081		1-12 OZ	PCE	FRABON	SAUSAGE BULK BRKFST 12OZ	3.30		
2335		12-1#	CSE	FRABON	SAUSAGE BRATWURST CK RTL	58.19		
2336		1-1#	PCE	FRABON	SAUSAGE BRATWURST CK RTL	5.33		
2340		2-6#	CSE	FRABON	SAUSAGE BULK BRAT 11"	5.55		
2341		1-6#	BAG	FRABON	SAUSAGE BULK BRAT 11"	6.35		
2350		2-6#	CSE	FRABON	SAUSAGE BULK BRAT 5-1 FC	4.50		
2351		1-6#	BAG	FRABON	SAUSAGE BULK BRAT 5-1 FC	4.95		
3020		12-1#	CSE	FRABON	SAUSAGE BRAT WILD RICE CK	49.50		
3021		1-1#	PCE	FRABON	SAUSAGE BRAT WILD RICE CK	4.53		
3022		2-6#	CSE	FRABON	SAUSAGE BULK BRT WR/SM RG	4.25		

Found: 27 Active Order: Order[01161]

Additional Item Info: Name, Value, Category: 33, Price Book Line #:, OOH: 3

Red items are out of stock.  
Green items are sell outs.  
Right-click on a colored item to learn why it is colored.

To further narrow your search, you can search for more than one word. Searching for "beef brisket" gives fewer results than searching for just "beef." "Brisket beef" works, too.

To add a found item to the order, change the quantity. This adds the item to the Order panel.

Order[01161] History Items Found[ sausage br ]

<Enter Order Quantity>  
3

WWP	Item#	Qty	Pack & Size:	Type:	Brand:	Description:	Sell
3	59100	1	1-35#	JUG	VENTUR	OIL CREAMY LIQUID FRY AV	19.0
1	91087	2	1-28OZ	TUB	FRABON	SPICE STEAK SEASONING*	16.0
2	9131	1	1-5#	BAG	RUSS	PROD TOMATO 5 LB	7.2
1	45069	2	6-4.5#	CSE	CLASIC	POTATO FRY C/C 5/16*	14.0
	1180	1	2-5#	CSE	TRES	SAUSAGE CRUMBLES BRKF FC	34.8
	1925	3	1-5#	RND	FRABON	SAUSAGE BULK BRKFST 1-5	14.3

Order[01161] History Items Found[ sausage br ]

<Enter Order Quantity>

Item#	OrdQty	Pack & Size:	Type:	Brand:	Description:	Price
1180	1	2-5#	CSE	TRES	SAUSAGE CRUMBLES BRKF FC	34.80
1675		12-1#	CSE	FRABON	SAUSAGE BRAT W/KRAUT RTL#	58.19
1676		1-1#	PCE	FRABON	SAUSAGE BRAT W/KRAUT RTL#	5.28
1905		1-6#	BOX	FRABON	SAUSAGE BREAKFAST 16/1#	24.50
1924		6-5#	CSE	FRABON	SAUSAGE BULK BRKFST 6-5	85.80
1925	3	1-5#	RND	FRABON	SAUSAGE BULK BRKFST 1-5	14.30
1965		12-1#	CSE	FRABON	SAUSAGE CHIX BRAT W/R	57.05
1966		1-1#	PCE	FRABON	SAUSAGE CHIX BRAT W/R	5.25

A12

When you are finished finding items, you can either close this Find panel or find other items. Press **[F3]** twice so that the entry field asks for **Enter Item Find Value** and type something else to search for.

 <p>Clicking on the <b>Find</b> button or pressing <b>[F3]</b> when in a product list allows you to search found items with Progressive Search. Pressing it again asks for a different search term.</p>	 <p>Clicking on the <b>Find Item</b> opens another Find panel. This is especially useful when ordering cups and lids or other related items.</p>
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## Finding Items in Order Guides

An order guide is a list of items that either you make or that are sent down from the company. You can browse order guides just as you browse history or the Product Catalog or item groups.

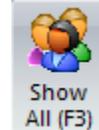


Click on the **Browse Order Guides** icon to open the list of order guides.

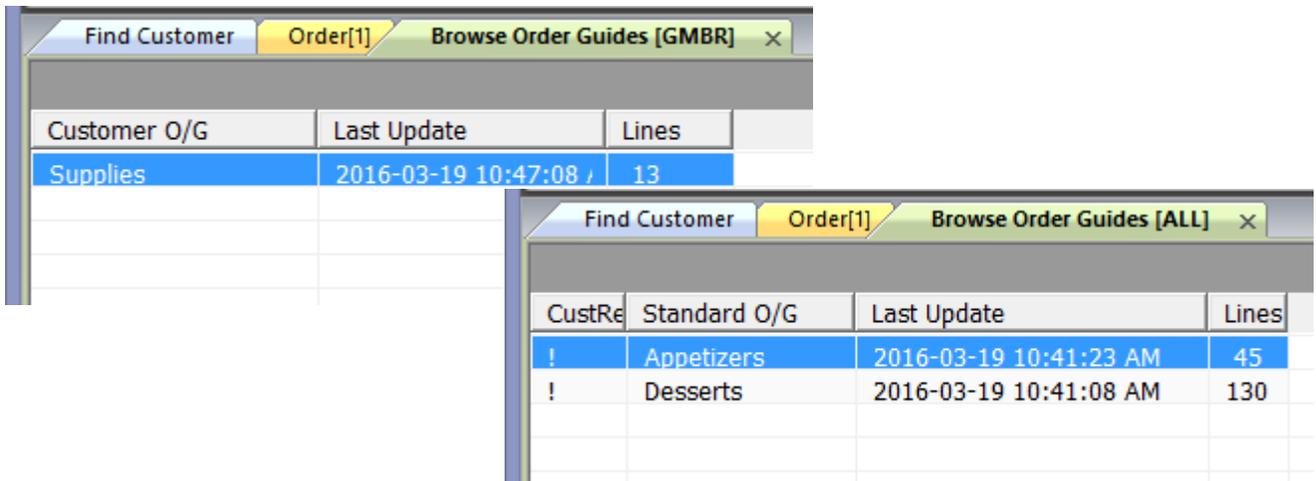
### Customer-Specific and Global Order Guides

There are two types of order guides, customer-specific and global. A customer-specific order guide is created when a particular customer is active. It can then be used only for that customer. A global order guide is created when no customer is active. These can be used by any customer.

When you click on the **Browse Order Guides** icon, it shows you the list of order guides for the active customer. To see the standard order guides, click the **Show All** icon or press **[F3]**.



When you are viewing the standard order guides, this icon changes to **Show Specific**.



Customer O/G	Last Update	Lines
Supplies	2016-03-19 10:47:08 /	13

CustRe	Standard O/G	Last Update	Lines
!	Appetizers	2016-03-19 10:41:23 AM	45
!	Desserts	2016-03-19 10:41:08 AM	130

Double-click on an order guide to open the desired order guide.

As with the History, Find, and Groups panels, setting a quantity on an item adds it to the order.

Order[01161] History Items Found[sausage br] Browse Order Guides [ALL] Guide[Appetizers]

<Enter Order Quantity>

Item#	OrdQty	Pack & Size:	Type:	Brand:	Description:	Price	Portion \$	Last So
22453		1-2.5#	BAG	SHARE	APTZ SOUTHWEST BITES*#	13.85		
24100		6-4#	CSE	FREDS	APTZ CAULIFLOWER BUD BRD	69.01		
24101	1	1-4#	BOX	FREDS	APTZ CAULIFLOWER BUD BRD	13.70		
24102		6-3#	CSE	ANCHOR	APTZ CAULIF BATTERED	57.30		
24105		10-12.13	CSE	ANCHOR	APTZ DIPPER SPIN & ART#	60.80		
24107		10-12.13	CSE	ANCHOR	APTZ DIPPER BEEFY NACHO#	60.80		
24130	2	6-2#	CSE	FREDS	APTZ CAULIF BATTERED PERF	33.60		
24131		1-2#	BAG	FRED'S	APTZ CAULIF BATTERED PERF	6.90		
24132		6-2#	CSE	HARVES	APTZ CAULIFLOWER BRD#	46.20		
24257		4-3#	CSE	FREDS	APTZ HOWLER CHED CHZ#	69.40		
24260		6-2#	CSE	FREDS	APTZ CURD WHITE CHeddar#	76.75		
24262		6-2.5#	CSE	RIVER	APTZ CURD WHT CHED OVEN*	80.85		
24265		4-5#	CSE	RIVER	APTZ CURD WHITE CHEESE*	108.95		
24266		1-5#	BOX	RIVER	APTZ CURD WHITE CHEESE*	29.35		
24272		4-2.5#	CSE	RIVER	APTZ CURD HOTTIES 1/2 NK*	56.05		
24277		6-2#	CSE	RIVER	APTZ CURD WHITE LEINIE*	65.55		
24287		4-2.5#	CSE	RIVER	APTZ CURD YELLOW 1/2 NAK*	55.40		
24292		4-2.5#	CSE	RIVER	APTZ CURD WHITE 1/2 NAK*	48.24		
24989		1-100 CT	CSE	WING	APTZ RANGOON SPIN & ART#	45.05		

Found: 147 Active Order: Order[01161]

Additional Item Info

Name	Value
Category:	25
Price Book Line #:	39
OOH:	10
OOO:	72
Due Date:	01/09/17
Weight:	
Movement:	4
Size of Servinq:	1
Portion U/M:	CT
Average Usage:	00036
Price Book Group:	025
C/W:	
Portions per Case:	100

For more information on creating and working with order guides, see page 40.

## Order Summary

At the bottom of the Order panel is the Order Summary. Pressing **Ctrl-P** displays additional information.

Active:(Order[01161]) [01161 PRAIRIE RIVER RETREAT#] - Sales Rep Order Entry

Work With Communications Orders

New Order New Order from History Find Item Group Browse Order Log Browse Order Guides Customer Find All History History Customers for this Item Find Delete New Look Header Price Calculator Close

Order[01161] History Items Found[sausage br] Browse Order Guides [ALL] Guide[Appetizers]

<Enter Order Quantity>

WWP	Item#	Qty	Pack & Size:	Type:	Brand:	Description:	Sell	Extend\$	P	QOH:	C/W:	Last \$	Last Sold
3	59100	1	1-35#	JUG	VENTUR	OIL CREAMY LIQUID FRY AV	19.94	19.94	B	190		19.95	12/22/2016
1	91087	2	1-28OZ	TUB	FRABON	SPICE STEAK SEASONING*	16.30	32.60	Z	51		16.30	01/05/2017
2	9131	1	1-5#	BAG	RUSS	PROD TOMATO 5 LB	7.20	7.20	Z	9		7.15	12/29/2016
1	45069	2	6-4.5#	CSE	CLASIC	POTATO FRY C/C 5/16*	14.20	28.40	Z	192		14.20	01/05/2017
	1180	1	2-5#	CSE	TRES	SAUSAGE CRUMBLES BRKF FC	34.80	34.80	Z	3			
	1925	3	1-5#	RND	FRABON	SAUSAGE BULK BRKF 1-5	14.30	42.90	Z	39			
	24101	1	1-4#	BOX	FREDS	APTZ CAULIFLOWER BUD BRD	13.70	13.70	Z	63			
	24130	2	6-2#	CSE	FREDS	APTZ CAULIF BATTERED PERF							

Lines:8 for \$246.74 Cse:13 Ech:0

When profit columns are displayed ([Ctrl][P]), there is additional information.

Lines:8 for \$246.74 Cse:13 Ech:0 GP\$:48.68 GP%:19.72 Cost:198.06

Lines:8 for \$246.74 Cse:13 Ech:0

## Changing Prices

Click on the **Sell** column or press **[Tab]** from the quantity field. This will change the entry field to ask for a Sell price. You can enter a new sell price by typing in a new value.

WWP	Item#	Qty	Pack & Size:	Type:	Brand:	Description:	Sell	Extend\$	P	QOH:	C/W:	Last \$	Last Sold
3	59100	1	1-35#	JUG	VENTUR	OIL CREAMY LIQUID FRY AV	19.94	19.94	B	190		19.95	12/22/2016
1	91087	2	1-28OZ	TUB	FRABON	SPICE STEAK SEASONING*	16.30	32.60	Z	51		16.30	01/05/2017
2	9131	1	1-5#	BAG	RUSS	PROD TOMATO 5 LB	7.20	7.20	Z	9		7.15	12/29/2016
1	45069	2	6-4.5#	CSE	CLASSIC	POTATO FRY C/C 5/16*	14.20	28.40	Z	192		14.20	01/05/2017
	1180	1	2-5#	CSE	TRES	SAUSAGE CRUMBLES BRKF FC	34.80	34.80	Z	3			
	1925	3	1-5#	RND	FRABON	SAUSAGE BULK BRKFAST 1-5	14.30	42.90	Z	39			
	24101	1	1-4#	BOX	FREDS	APTZ CAULIFLOWER BUD BRD	13.70	13.70	Z	63			
	24130	2	6-2#	CSE	FREDS	APTZ CAULIF BATTERED PERF	33.60	67.20	B	2			

For more advanced pricing information, press **[Ctrl][P]** to display the pricing columns and scroll over to see more information. (You can hide this information later by pressing **[Ctrl][C]**.)

Wwp	Brand:	Description:	Sell	Extend\$	P	QOH:	C/W:	Last \$	Last Sold	GP %	GP \$	Book Cost:	Mfg #:
JG	VENTUR	OIL CREAMY LIQUID FRY AV	19.94	19.94	B	190		19.95	12/22/2016	-0.20	-0.04	19.980	45531
UB	FRABON	SPICE STEAK SEASONING*	16.30	32.60	Z	51		16.30	01/05/2017	35.64	11.62	10.490	203796
AG	RUSS	PROD TOMATO 5 LB	7.20	7.20	Z	9		7.15	12/29/2016	21.81	1.57	5.630	
SE	CLASSIC	POTATO FRY C/C 5/16*	14.20	28.40	Z	192		14.20	01/05/2017	21.62	6.14	11.130	
SE	TRES	SAUSAGE CRUMBLES BRKF FC	34.80	34.80	Z	3				25.95	9.03	25.770	91155
ND	FRABON	SAUSAGE BULK BRKFAST 1-5	14.30	42.90	Z	39				21.61	9.27	11.210	1925
OX	FREDS	APTZ CAULIFLOWER BUD BRD	13.70	13.70	Z	63				21.82	2.99	10.710	1276
SE	FREDS	APTZ CAULIF BATTERED PERF	33.60	67.20	B	2				12.05	8.10	29.550	028222

You can now change the price by manipulating the GP%.

To change the price by manipulating the GP%, click on that column or tab over (twice from the quantity field, once from the price field). Type a new margin and press **[Enter]**. This will change the price.

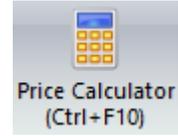
### Keeping Secret Stuff Secret

You do not have to see the margin in order to adjust it. When you are looking at the default screen (or press **[Ctrl][C]** to hide the pricing columns), the margin column is still there, but hidden. From the quantity field, press **[Tab]** twice and you will see the margin in the entry field and be able to edit it there.

Press **Ctrl-C** to Close the secret pricing information.

## The Price Calculator

You can get more in-depth information about pricing with the Price Calculator.



Price Calculator - 0009131 : PROD TOMATO 5 LB RUSS 1-5#

Quantity	Price	Extended Price
1	@ 7.45	= 7.45
Margin %	Markup %	Cost
24.43	32.33	5.63

Update Pricing:

Temporary  
 Permanent

Information:

Profit \$ 1.82  
 Commission 0.00

Zones:

OK CANCEL

The Price Calculator is especially useful for quoting prices or checking margins without opening an order. You can pull up the Item Browse, find an item, bring up the Price Calculator, and enter a margin. Press **[Tab]** (not **[Enter]**) to see what price that margin reflects.

Prices changed on the Order Pad represent permanent price changes. They update your customer's price on the back office system. You can see this by scrolling over to the right, where in the P column the original price code has changed to a pound sign (#).

Order[01161] x History Items Found[ sausage br ] Browse Order Guides [ALL] Guide[Appetizers]

<Enter Order Quantity>  
1

WWP	Item#	Qty	Pack & Size:	Type:	Brand:	Description:	Sell	Extend\$	P
3	59100	1	1-35#	JUG	VENTUR	OIL CREAMY LIQUID FRY AV	19.94	19.94	B
1	91087	2	1-28OZ	TUB	FRABON	SPICE STEAK SEASONING*	16.30	32.60	Z
2	9131	1	1-5#	BAG	RUSS	PROD TOMATO 5 LB	7.45	7.45	#
1	45069	2	6-4.5#	CSE	CLASIC	POTATO FRY C/C 5/16*	14.20	28.40	Z
	1180	1	2-5#	CSE	TRES	SAUSAGE CRUMBLES BRKF FC	34.80	34.80	Z
	1025	2	1-5#	RND	FRABON	SAUSAGE BULK BRKFAST 1-5	14.30	47.00	7

The Price Calculator can be used to make a temporary price change, or one time deal. The trick is that you have to click the **Permanent** option.

Price Calculator - 0001180 : SAUSAGE CRUMBLES BRKF FC TRES 2-5#

Quantity: 1 @ Price: 33.60 = Extended Price: 33.60

Margin %: 23.30 Markup %: 30.38 Cost: 25.77

Update Pricing:
   
 Temporary
   
 Permanent

Information:
   
Profit \$: 7.83
   
Commission: 0.00

Zones: [Dropdown]

OK CANCEL

This results in a price code of an asterisk (\*), indicating that the price is temporary. (Yes, it's backwards.)

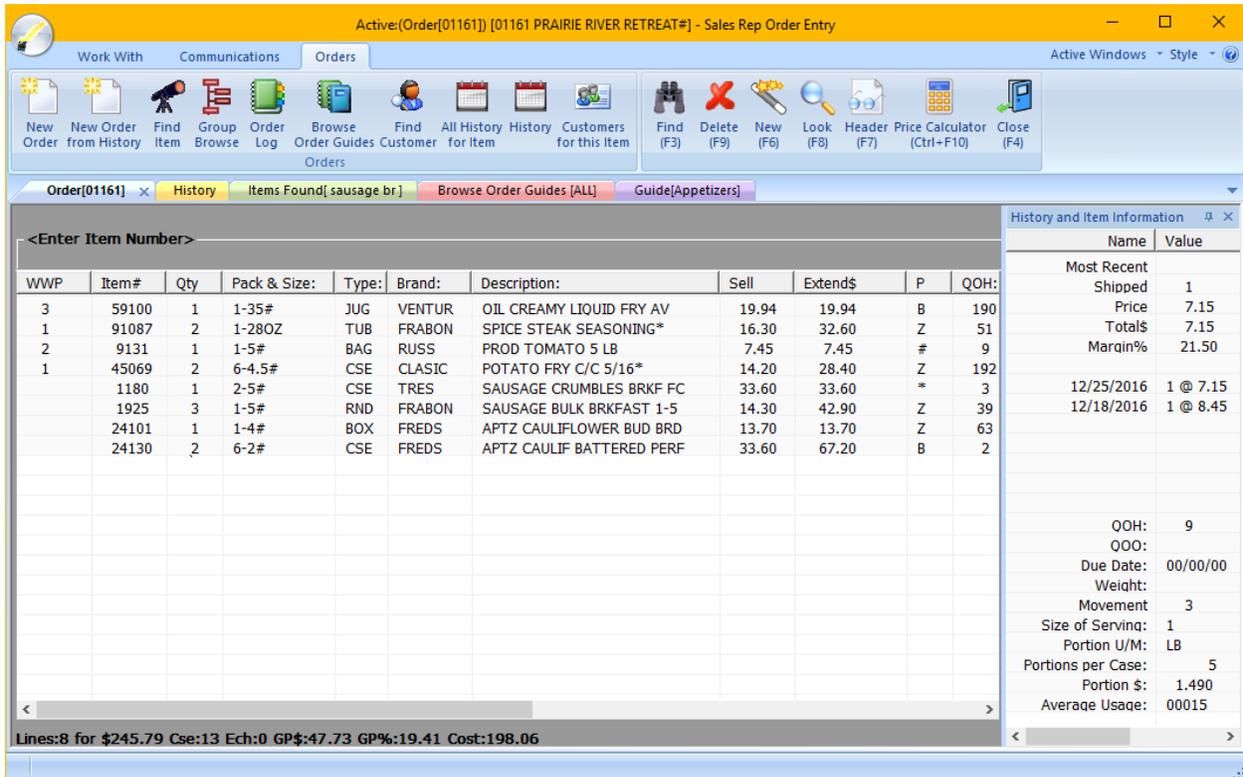
Order[01161] x History Items Found[ sausage br ] Browse Order Guides [ALL] Guide[Appetizers]

<Enter Order Quantity>  
1

WWP	Item#	Qty	Pack & Size:	Type:	Brand:	Description:	Sell	Extend\$	P	QC
3	59100	1	1-35#	JUG	VENTUR	OIL CREAMY LIQUID FRY AV	19.94	19.94	B	1
1	91087	2	1-28OZ	TUB	FRABON	SPICE STEAK SEASONING*	16.30	32.60	Z	:
2	9131	1	1-5#	BAG	RUSS	PROD TOMATO 5 LB	7.45	7.45	#	:
1	45069	2	6-4.5#	CSE	CLASIC	POTATO FRY C/C 5/16*	14.20	28.40	Z	1
	1180	1	2-5#	CSE	TRES	SAUSAGE CRUMBLES BRKF FC	33.60	33.60	*	:
	1925	3	1-5#	RND	FRABON	SAUSAGE BULK BRKFAST 1-5	14.30	42.90	Z	:
	24101	1	1-4#	BOX	FREDS	APTZ CAULIFLOWER BUD BRD	13.70	13.70	Z	:

## Item Information

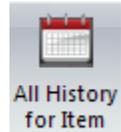
Certain columns on panels are editable. If you double-click on these columns, you will be able to change certain information. For example, if you double-click on the quantity column, it increments the quantity of the selected item by 1. If you double-click some price fields, it may change the price, depending on your configuration. However, if you double-click on most of the item line, you open the **History and Item Information**.



This panel is movable, and is shown in the docked position. For more information on moving panels, see page 65.

## Viewing and Changing History

The History Browse and New Order from History will display a list of items that the customer has purchased. The History Browse will also show the date of the last sell and the quantity sold during each of the past six weeks. To see a more complete history, select an item and click **All History for this Item**. This will show you all of the sales of the item for up to a year.



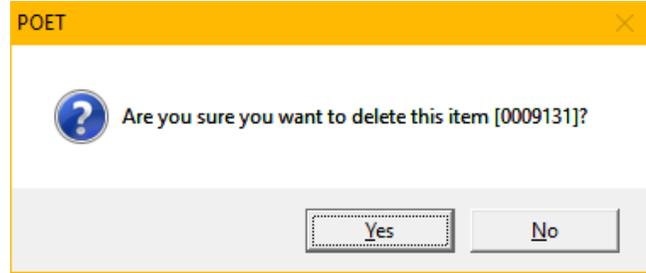
Invoice	Last Sold	Ship Qty	Case Price	Extended Price	Primary Sales Rep
590180	12/22/2016	1	8.45	8.45	SLS02
590520	12/29/2016	1	7.15	7.15	SLS02

The **All History for this Item** window can be used to manipulate history, to add items that have never really be sold to this customer, and to delete items that the customer does not want to buy anymore.



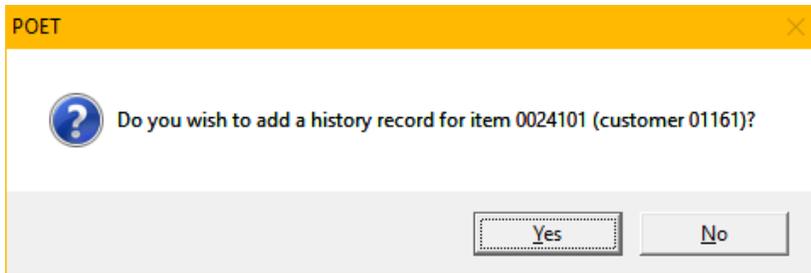
In the right-hand buttons for this panel are **Delete** and **Add New**. If there is history, you can delete it. If there is no history, you can add a new one.

Because this item has history, you can delete it by clicking the **Delete** button. You are prompted to confirm that you want to delete the history.



If you click **Yes**, then the next time that you open the History Browse or the New Order from History, the item not be there. Note that if either of these panels is already open, the item will still be there, because it was part of the history when the panel was loaded.

If an item does not have history, opening the All History for this Item panel will display a blank panel. In this case the **Add New** button will be enabled. When you click this button, you will be asked to confirm that you wish to add a history record.

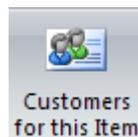


If you click **Yes**, the next time you open the History Browse or the New Order with History, this item will be included. As before, it will not change the information displayed in any panel already open.

## Finding Other Customers

There may be times when you need to know what other customers purchase an item. You can compare how much your customers are paying for a particular item. Some reps even borrow a desperately needed item from another customer.

To see who orders an item, select an item in any panel and click the **Customers for this Item** button. This will tell you the most recent invoice and ship date for any customer that purchases the item, along with the quantity shipped and price.

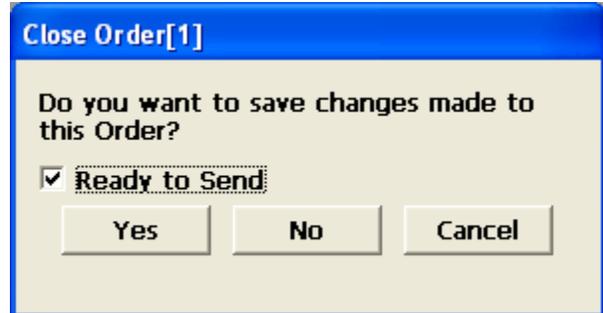


Customer	Customer Name	Invoice #	Date	Qty	Price
00037	ANDY	590747	01/03/2017	4	20.00
00141	BILLY'S PIT STOP#	590406	12/27/2016	2	20.00
00216	THIRSTY MOOSE#	590762	01/03/2017	4	20.00
00273	LAKE STREET BAR & GRILL#	590611	12/30/2016	2	20.00
00413	DAWGHOUSE BAR & GRILL#	590131	12/21/2016	2	20.89
00535	GRAND ELY LODGE#	590979	01/06/2017	6	20.00
01027	MARY'S MORSELS & CATER#	590640	12/30/2016	2	22.51
01039	MCKENZIES BAR & GRILL#	590958	01/06/2017	3	20.99
01161	DRAPE DRIVER DETROIT#	590188	12/23/2016	2	10.05

## Closing the Order

When you have finished the order, close the order by clicking the **Close** icon, pressing **[F4]**, or clicking the **[x]** at the right side of the order tab. The Close Order dialogue displays.

- [Yes]** Close and save the order.
- [No]** Close the order, but do not save it. (You will be asked to confirm that you don't want to save the order.)
- [Cancel]** Do not close the order. Returns to the order for further work.

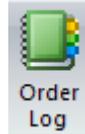


Checking the Ready to Send option marks the order as Ready to Send.

All orders go to the Order Log. When you Communicate and Send orders (see page 33), the only orders that are sent are those that are marked Ready to Send. If your order is finished, mark it Ready to Send

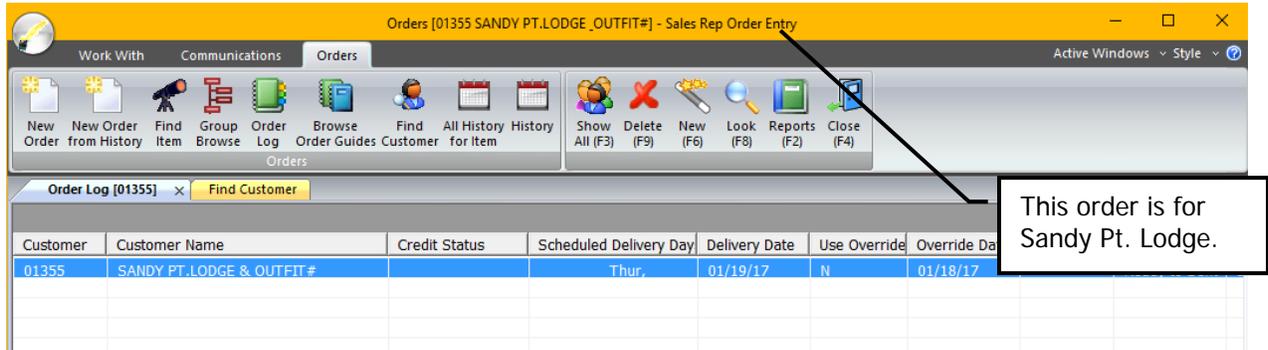
# The Order Log

Saved orders go to the Order Log. The Order Log holds orders, both sent and unsent. Unsent orders are held indefinitely. Sent orders will be automatically deleted after a time determined by your company, but which is usually eight days, so if you are taking an order today, you can see the customer's order last week.

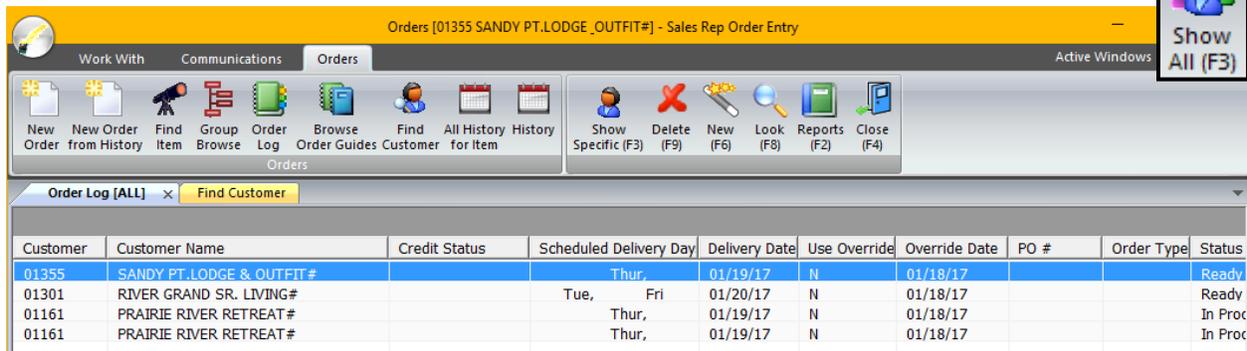


The Order Log is a panel in the Order ribbon. Click the icon to display it.

When the Order Log is first displayed, only orders for the Active Customer are shown.



Press **[F3]** or click **Show All** to show orders for all customers.



The **Show All** button also changes, to **Show Specific**. Pressing **[F3]** again returns you to seeing only orders for the specific active customer.

## Order Status

There are at least three order statuses.

### In Process

An In Process order was saved without marking the order Ready to Send. When you communicate and send orders, these orders will not be sent. In order to send these orders, you must re-open them and close them again, marking them Ready to Send. These orders can be changed.

Some users create In Process orders through carelessness. They open an order panel to look something up, close the order, and when prompted to save they order, click **[Yes]** even though they do not intend to create an order. You can avoid this by clicking **[No]** when you are creating an order.

Some users create an In Process order as a quote to a prospective customer, or for a customer who is going to be closed for a period of time, such as a seasonal facility or a school on break. When you do this, you freeze the sell price at the value it was when you created the order. While this is great for a bid if the time from bid to order is short, it's not good for a seasonal customer who is going to be closed for six months. A good idea for a seasonal customer is to create and save the order, then copy the order (see *Copying Orders*, next page) without copying prices.

### **Ready to Send**

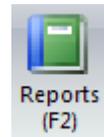
A Ready to Send order was marked Ready to Send when it was closed. When you communicate and send orders, these orders will be sent. These orders can be changed up until the time you send them.

### **Sent**

When you communicate and send orders, the order status is changed to Sent. These orders can be opened, but cannot be changed.

### **Print Back Received**

If your host system sends a report indicating that an order was received, this status indicates that such a report, or "print back" was received. You can review this print back by clicking on the **Reports** icon or pressing **[F2]**. For more on print backs and reports, see page 34.



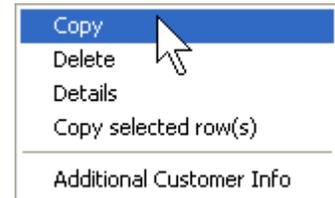
## Changing Orders

You can change a Ready to Send order or an In Process order. To change an order, double-click on it in the Order Log. The order will open.

If you do change the order, you will be prompted to review the Order Header prior to closing it. Every time you open an order, when you close it, you will have to re-confirm that the order is Ready to Send.

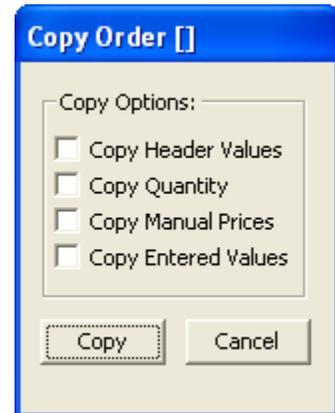
## Copying Orders

To copy an order, right-click on the order in the Order Log and select the option to Copy. You will be prompted with the Copy Options.



If you do not check any of the options, you will create an order with the default delivery data, no PO#, no special instructions, no quantities, and default pricing. You can also choose to include other information:

- |                            |  |
|----------------------------|--|
| <b>Copy Header Values</b>  | Copy the ship date, PO#, and special instructions. You will need to update the date if the ship date on the copied order is in the past. |
| <b>Copy Quantity</b>       | Will copy the quantities into the new order.   |
| <b>Copy Manual Prices</b>  | Will copy any manually changed prices.   |
| <b>Copy Entered Values</b> | Will copy any other things that might be settable in an order.   |



The copied order will open in a new panel. You can proceed to make whatever changes you desire. Then close and save the order as you would normally.

## Deleting Orders

**Warning: There is no way to recover deleted orders. Use caution.**

Orders with the status Sent and Printback Received will automatically delete from the Order Log after 16 days. However, you may wish to delete orders, especially In Process orders.

You can delete a single order by selecting it and pressing **[F9]** or clicking on the Delete icon. You can also select multiple orders and delete them simultaneously.



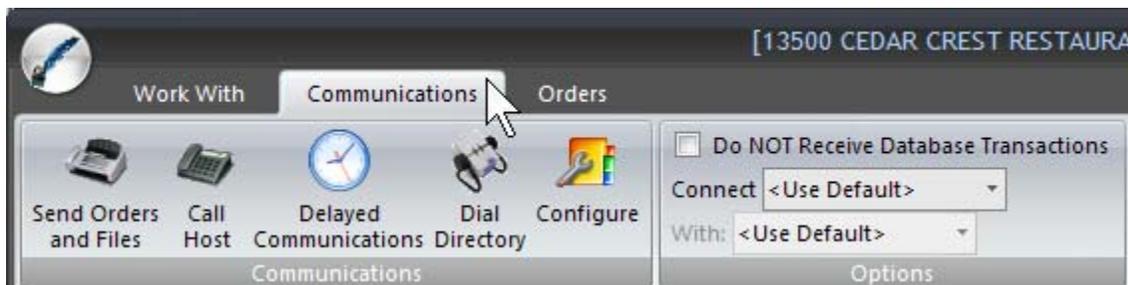
To select multiple orders, you must first get the orders in a sequential group. For example, to delete all In Process orders, sort the orders by Status. Go to the first order that you wish to delete and click once on it to highlight it. Then, while holding down the **[Shift]** key, click on the bottom order in the group to be deleted. This will select the entire group of orders. You can then click the delete icon or press **[F9]** to delete the selected orders.

The screenshot shows a window titled 'Order Log [ALL]' with a 'Find Customer' button. Below the window title is a table with the following columns: Customer, Customer Name, Credit Status, Scheduled Delivery Day, Delivery Date, Use Override, and Override. The table contains four rows of data. The first three rows are highlighted in blue, and a red 'Shift +' annotation with a mouse cursor is positioned over the first and third rows, indicating a multi-select operation.

Customer	Customer Name	Credit Status	Scheduled Delivery Day	Delivery Date	Use Override	Override
01355	SANDY PT.LODGE & OUTFIT#		Thur,	01/19/17	N	01/18/17
01301	RIVER GRAND SR. LIVING#		Tue, Fri	01/20/17	N	01/18/17
01161	PRAIRIE RIVER RETREAT#		Thur,	01/19/17	N	01/18/17
01161	PRAIRIE RIVER RETREAT#		Thur,	01/19/17	N	01/18/17

# Communicating

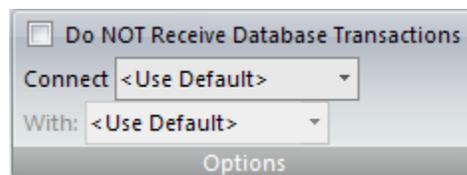
**Communications** is a separate category. Switch from **Work With** to **Communications** by clicking on the **Communications** tab on the ribbon.



If your company sends reports, you should make it a habit to check your reports any time you communicate with the Host, whether sending orders or calling host. For information on Reports, see page 34.

## Setting Up Communications

There is an icon on the Communications Ribbon to allow you to **Configure Communications**. In general, you will only do this with your POET® Administrator. However, you can adjust each communications session, each call to the server, prior to beginning communicating.



Your default connection is to use your FB LAN and connect over a wireless Internet connection or cellular phone card. If you need to use a phone connection, click on the drop-down and select it from the list.

## Do NOT Receive Database Transactions

Whenever you communicate, whether you send orders or call host, you will receive any files waiting for you. These may include print backs and other reports if your Host sends them, database updates, and program or configuration updates. Database updates and program or configuration updates take some time to process, time you may not want to spend if you are standing in front of your customer waiting to see if he got the last case of coffee filters.

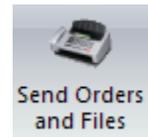
Selecting the option to not receive database transactions will allow you to send order (if you select that option) and only pick up print backs and reports.

## With

If you have more than one modem, you will be able to select which one to use from this list. If you have only one modem, you cannot change this setting.

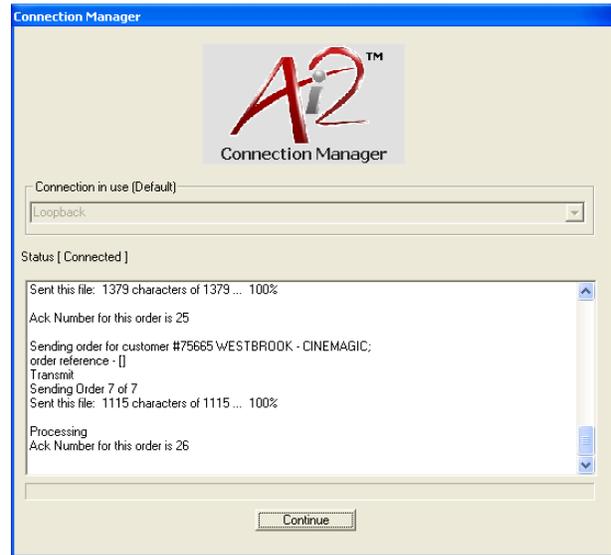
## Sending Orders

Any order that is marked Ready to Send can be sent to the Host. When you select the option to **Send Orders and Files**, they will be sent to the Host. Click the **Send Orders and Files** icon. This process starts immediately, so if you have to establish a connection, either by plugging in a phone or network cord, or by activating a wireless card, do so before you continue.



The Connection Manager will be displayed and communications will start. The button at the bottom will say . Do not click the **Disconnect** button.

When all orders are sent, any waiting print backs, reports, or updates will be received. When this is finished, the **Disconnect** button will change to a **Continue** button. Click the **Continue** button to close Connection Manager.



## Calling Host

Your Host sends updates to the Communications Server at least once a day. To pick up these updates, click on the **Call Host** icon. Any database updates, program updates, or configuration changes will sent.



Database updates must be processed. Wait while these updates are unpacked.

Program updates and configuration changes require that you close and restart POET®. A program update will prompt you to do this. A configuration change will not, but will show the changes the next time you do start POET®.

## Reports

Reports are messages sent from the Host. The type of reports available depend on the capability of the Host. If your Host sends reports, it is a good idea to check reports after any form of communicating.

### Print Backs

A print back is a report related to an order. You can read these in the Order Log or in the Reports category.

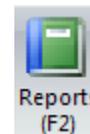
### Print Backs in the Order Log

In the Order Log, select an order that has the status "Print Back Received."

CustRe	Customer Name	Credit Status	Routed Date	Date O/R	Override Date	PO #	Order Type	Status	Last Upd
06250	BOONVILLE HIGH SCHO		11/18/11		11/18/11			In Process	11/17/2
09122	ANNIE'S PIZZA II		00/00/00		00/00/00		P	Sent	12/6/20
09122	ANNIE'S PIZZA II		00/00/00		00/00/00		P	Sent	12/6/20
09122	ANNIE'S PIZZA II		00/00/00		00/00/00		P	Sent	12/6/20
09122	ANNIE'S PIZZA II		00/00/00		00/00/00		P	Print Back Receive	12/6/20
09122	ANNIE'S PIZZA II		00/00/00		00/00/00		P	Print Back Receive	12/6/20
09120	ANNIE'S PIZZA		12/16/11	Y	12/16/11			Sent	12/6/20
09120	ANNIE'S PIZZA		12/16/11	N	12/16/11			Sent	12/6/20
09120	ANNIE'S PIZZA		12/14/11	N	12/14/11			Sent	12/6/20

Click on the Reports icon. This will open the print back for that order.

Order Log									
Confirmation Ack#[2246]									
LAPTOP - ORDER CONFIRMATION									
SALESREP 38 JOHN WELLS                      DATE 12/06/2011 TIME 15:30:15 ORD# 20000									
CUST#		CUSTOMER			DATE/RUT		12/06/2011 15:30		
CUST#		ITEM#	INVOICE#	DATE/RUT		12/06/2011			
09122		05505	844932	*** PICKUP REQUEST ***					



### Print Backs in the Reports Category

If you send multiple orders, it may be easier to open the Reports category and view the reports there.

Click the **Work With** ribbon tab and click **Reports**. This will open the Reports category and display the Reports panel.



Status	Order	Report	Date	Lines	Pages
Viewed		Confirmation Ack#[2246]	12/6/2011 3:28:3	11	1
Viewed		Confirmation Ack#[2248]	12/6/2011 3:31:4	11	1

Like the Order Log, when you first open the Reports panel, you see the reports for the active customer. To see the reports for all customers, click the **Show All** icon.



Status	Customer	Customer Name	Order	Report	Date	Lines	Pages
Viewed				Confirmation Ack#[2227]	12/6/2011 3:28:3	18	1
Viewed	09122	ANNIE'S PIZZA II		Confirmation Ack#[2246]	12/6/2011 3:28:3	11	1
Viewed	09122	ANNIE'S PIZZA II		Confirmation Ack#[2248]	12/6/2011 3:31:4	11	1

## Other Reports

Besides print backs, other reports may be available. These reports are not customer-specific, so they can only be seen when you select the option to Show All reports.

Status	Customer	Customer Name	Order	Report	Date	Lines	Pages
Viewed	13500	CEDAR CREST R		Confirmation Ack#[1498]	/2010 1:~	12	1
Viewed	13500	CEDAR CREST R		Confirmation Ack#[1499]	/2010 1:~	12	1
New				EOD RECAP 04/02/10 08	2010 1:5:	137	3

Double-click on any of these reports to display them. Click on the **[x]** to close the report and return to the Reports panel.

EOD RECAP 04/02/10 08:37:18

DAILY SALESMAN 302 RECAP ON 04/02/10 AT 08:32

CUSTOMER	CUSTOMER NAME	LOAD	DROP	NOTES
0202200	CRAB ZONE,LLC	047	09	ORDER RECAP

ORDER SUMMARY:	ORDERED	VALUE	REFERENCE
	16	1,067	431

CUSTOMER	CUSTOMER NAME	LOAD	DROP	NOTES
0251173	EL MARIACHI	311	02	ORDER RECAP

ORDER SUMMARY:	ORDERED	VALUE	REFERENCE
	14	565	04

CUSTOMER	CUSTOMER NAME	LOAD	DROP	NOTES
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# Accounts Receivable

POET® stores open orders and credits associated with open orders. While the amount due is displayed in the Customer Information, Accounts Receivable shows individual orders and invoices.

Click on the **Work With** ribbon tab and click on the **Accounts Receivable** category.

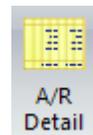


The Accounts Receivable category has its own **Find Customer** option that you can use to change customer. For information on finding a customer and setting them active, see

Finding a Customer, page 7.

## Opening A/R Detail

Click on the **A/R Detail** button to display the open invoices and credits for the active customer. Credits are shown with a negative balance.



Accounts Receivable [01636 UMD FOOD SERVICE] - Sales Rep Order Entry

Work With Communications Accounts Receivable Active Windows Style

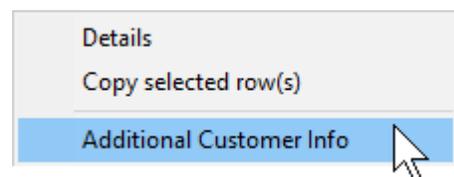
A/R Detail Find Customer Look (F8) Close (F4)

Find Customer A/R Detail

Date	Invoice#	Amount	Running Total
12/06/16	589209	5735.77	8230.59
12/06/16	589210	866.48	9097.07
12/07/16	589334	2719.75	11816.82
12/07/16	589335	523.78	12340.60
12/08/16	589396	1444.26	13784.86
12/08/16	589397	198.59	13983.45
12/09/16	589458	1026.01	15009.46
12/09/16	589459	197.24	15206.70
12/12/16	589590	367.48	15574.18
12/12/16	589591	1097.96	16672.14
12/13/16	589622	384.89	17057.03
12/13/16	589623	1660.44	18717.47
12/14/16	589751	1523.19	20240.66
12/14/16	589752	130.89	20371.55
12/15/16	589794	88.80	20460.35
12/15/16	589795	714.84	21175.19
01/03/17	590729	632.00	21807.19
01/03/17	590730	722.25	22529.44
01/04/17	590835	413.83	22943.27
01/05/17	590924	465.40	23408.67
01/05/17	590925	2468.85	25877.52
01/06/17	590954	476.81	26354.33
01/06/17	590955	377.03	26731.36

Found: 26 No Active Order selected

Right-click and select Additional Customer Info to display the customer information, including A/R and account aging.



Accounts Receivable [01636 UMD FOOD SERVICE] - Sales Rep Order Entry

Work With Communications Accounts Receivable Active Windows Style

A/R Detail Find Customer Look (F8) Close (F4)

Find Customer A/R Detail

Date	Invoice#	Amount	Running Total
12/06/16	589209	5735.77	8230.59
12/06/16	589210	866.48	9097.07
12/07/16	589334	2719.75	11816.82
12/07/16	589335	523.78	12340.60
12/08/16	589396	1444.26	13784.86
12/08/16	589397	198.59	13983.45
12/09/16	589458	1026.01	15009.46
12/09/16	589459	197.24	15206.70
12/12/16	589590	367.48	15574.18
12/12/16	589591	1097.96	16672.14
12/13/16	589622	384.89	17057.03
12/13/16	589623	1660.44	18717.47
12/14/16	589751	1523.19	20240.66
12/14/16	589752	130.89	20371.55
12/15/16	589794	88.80	20460.35
12/15/16	589795	714.84	21175.19
01/03/17	590729	632.00	21807.19
01/03/17	590730	722.25	22529.44
01/04/17	590835	413.83	22943.27
01/05/17	590924	465.40	23408.67
01/05/17	590925	2468.85	25877.52
01/06/17	590954	476.81	26354.33
01/06/17	590955	377.03	26731.36

Found: 26 No Active Order selected

Additional Customer Info

Name	Value
Customer	01636
Name	UMD FOOD SEF
Address	KIRBY RECEIPI
City/State/Zip	DULUTH
Phone #:	218-726-8171
Fax #:	218726825
Credit Ap:	J
A/R Contact:	JENNIFER
A/R Phone:	2187268216
Terms code:	07
Terms:	PAY BY STATEI
Price Zone:	3
Substitutions?	Y
Equipment?	N
A/R Balance:	26,731.36
Period 1:	17,571.09
Period 2:	9,160.27
Period 3:	0.00
Period 4:	0.00
Period 5:	0.00
Last Sale Date:	01/06/17
Last Pay Date:	01/04/17
Last Pay Amt:	25,234.8
YTD Sales:	5,407.07

Double-clicking on an invoice will open the invoice detail.

Accounts Receivable [01636 UMD FOOD SERVICE] - Sales Rep Order Entry

Work With Communications Accounts Receivable

A/R Detail Find Customer Look (F8) Close (F4)

Find Customer A/R Detail ARInvoiceDetail

Item	Description	C/W	Shipped	\$ per CSE or LB	Total\$
25057	BREAD GRAIN SEVEN 5/8*		1	38.95	38.95
25287	BREAD PITA FOLDS 6" 2100		1	25.90	25.90
26005	BAGEL PLAIN BOIL 45101*		1	13.50	13.50
26017	BAGEL CINN RASIN BOIL*		1	13.95	13.95
26025	BAGEL BLUEBERRY BOIL*		1	13.95	13.95
26040	BAGEL FRENCH TOAST BOIL*		1	13.95	13.95
26047	BAGEL ASIAGO 45339*		1	20.99	20.99
37335	SAUCE ALFREDO POUCH GF		1	69.75	69.75
37380	CHEESE SAUCE NACHO POUCH		1	58.75	58.75
53877	GUACAMOLE EXTREME		1	44.80	44.80
57130	SAUCE PESTO BASIL		1	33.04	33.04
68545	SAUCE TZATZIKI		1	29.50	29.50

[590955] Total: \$377.03

The ARInvoiceDetail is shown here as a tabbed panel. This panel is movable, and can be docked for side-by-side viewing. For more information on moving panels, see page 15.

The status line shows the invoice number and the order total.

<b>[590955] Total: \$377.03</b>

# Order Guides

An order guide is a list of products that are gathered together for some purpose. Order guides can be created either on the Host or on an individual's computer.

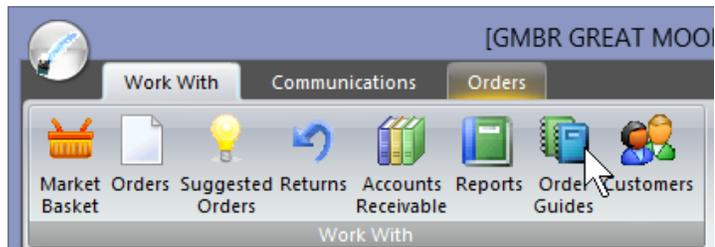
There are two types of order guides, customer-specific and global. A customer-specific order guide can only be seen by the customer that was active when it was created. A global order guide is created with no customer active, and can be seen by any customer.

A customer-specific order guide might be created for a customer who wants an order guide printed in the sequence that he keeps his storeroom. A customer might place orders for taxable and non-taxable items on separate invoices. A customer might want some items bundled separately such as a hotel placing orders for a restaurant, a bar, and housekeeping.

A global order guide can be created to promote sale items or discontinued items to clear a warehouse slot. It might be used for seasonal items or related items, like desserts or appetizers. It might be used to promote to different types of customers (a Korean list, a Chinese list, a Japanese list, a Thai list).

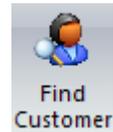
Once you create a list, you can order from it as you do a Group or History of Find list (see page 20).

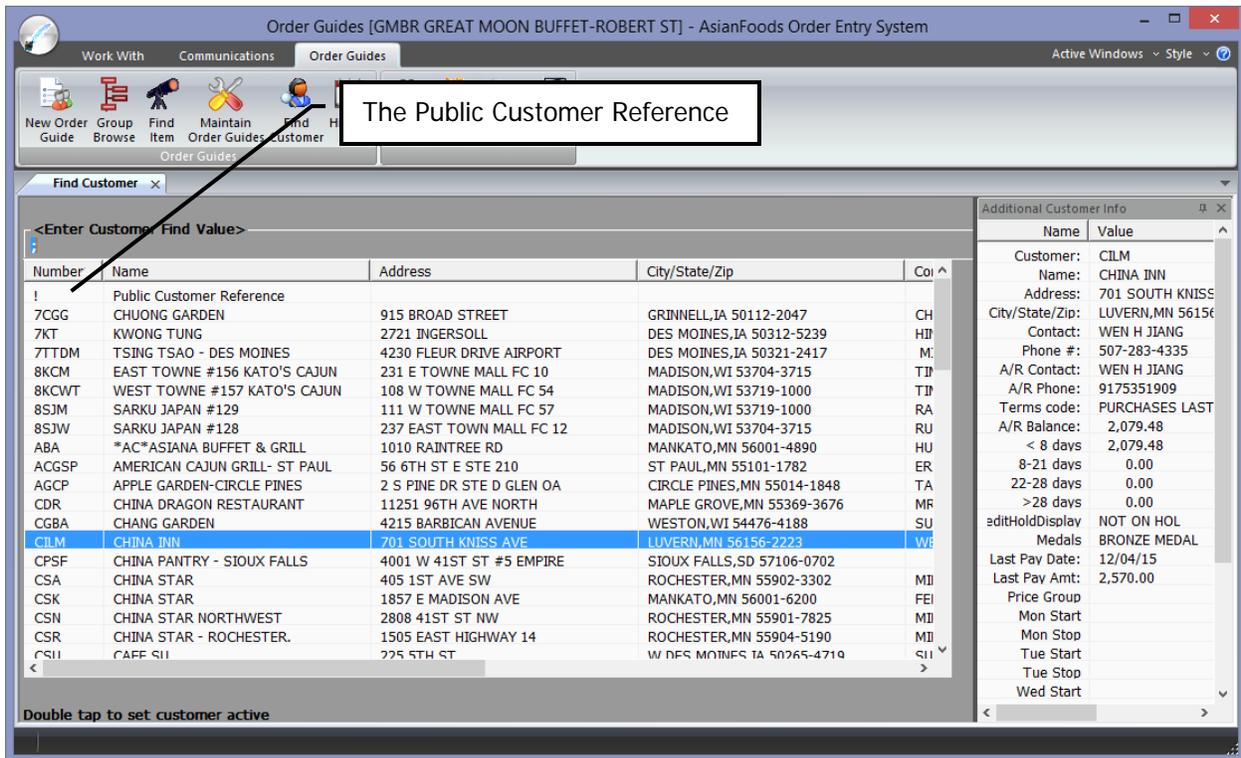
To get to Order Guides, click on the **Work With** ribbon tab and click the **Order Guide** icon.



## Creating Order Guides

Click on **Find Customers**. This displays the Customer List with which you are familiar. However there is an addition. The first customer has no customer number, but is instead represented by a !. The name is **Public Customer Reference**. You can select this customer to create a **standard** order guide, one that can be browsed by any customer. This is the type of order guide you would want to make for different restaurant types. But you can also start with a particular customer active and make use of their history and then save it for all customers if you like.



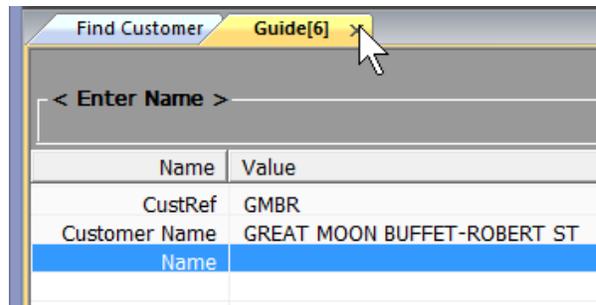


Double-click on your desired customer. This will change the Active Customer.

Click on **New Order Guide**. This opens the Order Guide Header, which is similar to an Order Header. Verify that you are using the correct customer, and give your order guide a name.



Close the order guide header by clicking on the **[x]**, and proceed into the order guide.



Depending on your type of order guide, you have various ways to add items to the guide. If you were making a global order guide for Chinese restaurants, you might use Find Item to find wonton skins, bok choy, soy sauce, and so forth. For sequencing a customer's storage areas or building a separate invoice, you might want to use the customer's history.

Active:Guide[6] [GMBR GREAT MOON BUFFET-ROBERT ST] - AsianFoods Order Entry System

Work With Communications Order Guides Active Windows Style

New Order Guide Group Browse Find Item Maintain Order Guides Find Customer History Find (F3) Look (F8) Close (F4)

Find Customer Guide[6] History

<Enter Order Quantity>

Item	OrdQty	Brand Name:	Pack & Size:	Pack Uf	Type:	Description	PC	Sell	Sell Ref	Last Sold
0248862		NOVEX PACKE	12/600FT		CS	TOWEL ROLL BROWN NON-PERF KRAFT	+		3.75	2016-03-19
0270633	1	PACKER	4X3 L		CS	COOKING WINE SHAO HSING	+	15.16	1.82	2016-03-19
0507430	1	NEWSBL	4-10#		CS	CHICKEN LEG MEAT BNLS	+	0.78	0.08	2016-03-19
0566513	1	KINGPAS	70CT		CS	COOKIE 'V' COCONUT MACAROOH	+	7.65	0.81	2016-03-19
0834663	1	SYS REL	1000CT/CS		CS	TOWELETTE MOIST LMIN SCENT 5X7	+	9.89	1.46	2016-03-19
1000405	1	PACKER/JI HA	50#/JUMBO		CS	ONION YELLOW JUMBO FRESH	+	13.99	1.92	2016-03-19
1007897		PACKER	BUSHEL		CS	GREEN BEANS BUSHEL	+		5.35	2016-03-19
1007939		CALCO	10# CASE		CS	SPROUT BEAN MUNG	+		0.73	2016-03-19
1008382		PACKER	10# CASE		CS	PEA PODS NO CALYX	+		1.75	2016-03-19
1242429		PACKER	24ct CASE		CS	SPINACH FRESH BUNCHED	+		3.84	2016-03-19
1269554	1	PACKER	6/9 CT		CS	CANTALOUPE FRESH	+	21.69	2.88	2016-03-19
1330687	1	TORK	12/500		CS	NAPKIN DISP XPRESSNAP WHT	+	39.00	5.13	2016-03-19
1991066	1	PILLSBY	6/4ct CASE		CS	BISCUIT BUTTERMILK PILLSBURY	+	12.00	1.38	2016-03-19
1992270	1	PILGRIMS	40# CW CAS		CS	CHICKEN BREAST B/IN	+	1.01	0.09	2016-03-19
2011922	1	PACKER	18# CASE		CS	GRAPE RED SEEDLESS FRESH	+	47.86	6.32	2016-03-19
2213411		PACKER	128 CT		CS	BREAD TOAST GARLIC NY	+		2.10	2016-03-19
2249193		PACKER	2/24 BU		CS	GREEN ONION SMALL ICLSS	+		6.30	2016-03-19
3727955		AFFINITY	120/2 OZ		CS	EGGROLL PORK 2OZ 2 OZ	+		3.48	2016-03-19
3919115		KINGPAS	4 ROLLS		CS	CAKE 'A' CREAM JELLY ROLL	+		0.81	2016-03-19
4005583		KIKKOMAN	5 GAL		CS	SOY SAUCE 5 GAL KIKKOMAN	+		3.11	2016-03-19
4014577		SYS CTS	1/50 LB		CS	FLOUR H&R ALL PURPOSE	+		1.65	2016-03-19

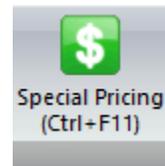
Found: 55 Active Order: Guide[6]

When you close the History or other panel, the items will be added to the guide in the order that you changed sequence.

Do your customers buy from another vendor as well? Consider adding these things to the order guide.

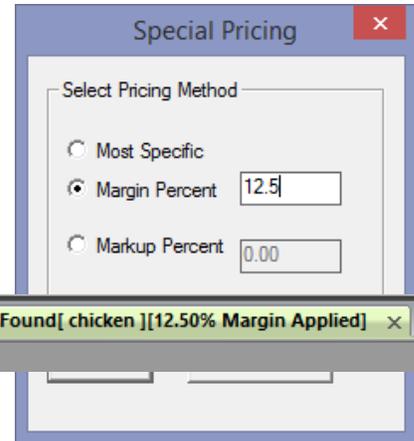
## Order Guide Pricing

You can change individual pricing on the order guide just as you do on an order. You click in the price or tab over to it and enter a new price. But you can also use **Special Pricing** to change the price of items in large groups as you add them.



With an order guide open, click the Special Pricing button. You can then change the price in two ways.

- Most Specific means pricing each item individually on the guide, like on an order.
- Margin Percent allows you to set a margin for the next group of items added.
- Markup Percent allows you to set a markup for the next group of items added.



Click **OK** and then open the History of Find Item.

Item#	OrdQty	Brand Name	UM1 on Hand	Qty on Order	Due Date	Type	Pack & Size	Pack UM2	Description
0275323		SP/SBL	267	150	01-05-16	CS	40# CASE		CHICKEN THIGH BNLS
0275372		PACKER				CS	40# AVG		CHICKEN WHOLE 5#/UP FZN
0298319		WEICHUAN	163	64	01-07-16	CS	8/50ct CAS		DUMPLING CHICKEN PCKD
0422404		PACKER		1	01-06-16	CS	10/2.1 LB		SILKIE CHICKEN
0453579		MDH				CS	10/100G		TANDOORI BBO MASALA CHICKEN
0456212		SHAN				CS	12/50G		MASALA CHICKEN TIKKA
0507430		NEWSBL	1132	1250	01-05-16	CS	4-10#		CHICKEN LEG MEAT BNLS

Notice that on the Find Item tab, in addition to the search term (**chicken**) it shows that a 12.50% margin was applied. The items what will be added to the guide from this pad will have a 12.5% margin at the start.

1000405	2	PACKER/JI HA	50#/JUMBO			CS	ONION YELLOW JUMBO FRESH	13.99	417	C	3.50		13.99
0834663		SYS REL	1000CT/CS			CS	TOWELETTE MOIST LMN SCENT 5X7	9.89	23	C	11.12		9.89
1348384	1	KNORR	12/2.2 LB			CS	CHICKEN BASE POWDER	91.43	35	m	12.50	11.43	91.43
1428200	1	PACKER	40# AVG CW			CS	CHICKEN LEG QUARTER LARGE FRZ	0.53	6	m	13.21	2.80	0.53

The percent may be a bit off, because we still have to set prices to the penny. The **m** in the price code indicate that the margin is being saved.

As cost goes up or down in the future, these items will stay at 12.5% margin over cost. If you browse an order guide to add items to an order, the items will come onto the order at that margin.

Some sales reps make multiple identical order guides except for the margin and use them to promote to new customers.

### The Difference Between Margin and Markup

If you've purchased anything, you're familiar with markup. A store pays for something, its cost, and then resells it at a higher price. The profit divided by the cost is the markup. But in sales, you worry about the margin. The profit divided by the sell price is the margin.

$$\text{Markup} = \frac{(\text{Sell} - \text{Cost})}{\text{Sell}}$$

$$\text{Margin} = \frac{(\text{Sell} - \text{Cost})}{\text{Cost}}$$

$$\frac{(110 - 100)}{100} = 10\% \text{ markup}$$

$$\frac{(110 - 100)}{110} = 9\% \text{ margin}$$

Given the same value of sell and cost, markup percents are always a bit larger than margin percents. In fact, the markup is always the markup percent higher than the margin. If the margin is 20%, the markup is 25%, and 25% is 25% higher than 20%.

## Sorting the Items on the Guide

The easiest way to sort the items on the order guide is to add them in the sequence you want. However, once you have them on the order guide, you can still control the sequencing.

The easiest sequences are by item number, description, or brand. If you click on the column header, the column will be sorted by that column.

Seq	Item#	Qty	Seq #	Brand Name:	Pack & Size:	Pack UM2	Type:	Description:	Sell	QOH
	1991066	1	0	PILLSBY	6/4ct CASE		CS	BISCUIT BUTTERMILK PILLSBURY	12.00	625
	1269554	1		PACKER	6/9 CT		CS	CANTALOUPE FRESH	21.69	207
	1992270	1		PILGRIMS	40# CW CAS		CS	CHICKEN BREAST B/IN	1.01	257
	0507430	1		NEWSBL	4-10#		CS	CHICKEN LEG MEAT BNLS	0.78	1132
	0566513	1		KINGPAS	70CT		CS	COOKIE 'V' COCONUT MACAROON	7.65	169
	0270633	1	1	PACKER	4X3 L		CS	COOKING WINE SHAO HSING	15.16	216
							CS	GRAPE RED SEEDLESS FRESH	47.86	53
							CS	NAPKIN DISP XPRESSNAP WHT	39.00	39

Click on the header of the Description column to sort the items by description. The small arrow indicates that the column is sorted and the sort order.

Seq and Seq #. Seq # is an editable column when you can enter numbers. They will be saved with your guide.

Seq	Item#	Qty	Seq #	Brand Name:	Pack & Size:	Pack UM2	Type:	Description:	Sell	QOH
	0270633	1	1	PACKER	4X3 L		CS	COOKING WINE SHAO HSING	15.16	216
	0566513	1		KINGPAS	70CT		CS	COOKIE 'V' COCONUT MACAROON	7.65	169
	1000405	1	2	PACKER/JI HA	50#/JUMBO		CS	ONION YELLOW JUMBO FRESH	13.99	417
	0834663	1		SYS REL	1000CT/CS		CS	TOWELETTE MOIST LMN SCENT 5X7	9.89	23
	0507430	1		NEWSBL	4-10#		CS	CHICKEN LEG MEAT BNLS	0.78	1132
	1269554	1		PACKER	6/9 CT		CS	CANTALOUPE FRESH	21.69	207
	1330687	1		TORK	12/500		CS	NAPKIN DISP XPRESSNAP WHT	39.00	39
	1991066	1	3	PILLSBY	6/4ct CASE		CS	BISCUIT BUTTERMILK PILLSBURY	12.00	625
	1992270	1		PILGRIMS	40# CW CAS		CS	CHICKEN BREAST B/IN	1.01	257
	2011922	1		PACKER	18# CASE		CS	GRAPE RED SEEDLESS FRESH	47.86	53

Seq is a column that is numbered automatically when you save the order guide. If you re-open it and sort by a different column you can get it back to the original sequence by sorting on the Seq column.

Seq	Item#	Qty	Seq #	Brand Name:	Pack & Size:	Pack UM2	Type:	Description:	Sell	QOH	F
1	3465150			FLO PAC	CASE DROP		CS	BRUSH DECK PALMYRA WO HDL	7.42		
2	3745593			PANDA	1 ONLY		EA	BRUSH WOK WOOD HANDLE	2.99	86	
3	2646646			3 REGIONS	10/100CT		CS	CHOPSTICK BAMBOO IN WHT ENV	28.46	65	
4	6967030			PACKER	10/90CT		CS	CHOPSTICK BAMBOO RED	16.99	323	
5	2994903			DART	200CT		CS	CONTAINER FOAM 1-SEC 206 9.2X6.5X2	24.67	134	
6	5754072			WORLD TABLE	36CT/CS		CS	FORK DINNER SALEM S-S	23.50	55	
7	4416780			PACKER	1000 COUNT		CS	KNIFE MED HAND PACK 1M	10.19	15	
8	8842409			NOVEX	3000CT		CS	NAPKIN DINNER 2-PLY 15X17 3000CT	29.90	395	
9	1330687			TORK	12/500		CS	NAPKIN DISP XPRESSNAP WHT	39.00	39	
10	5754098			WORLD TABLE	36CT/CS		CS	SPOON TEA SALEM S-S	16.67	15	
11	5769375			PACKER	12 ROLLS		CS	TOILET PAPER JUMBO 2PLY 12/1000	32.98	86	

## Saving the Order Guide

Save the order guide as you save an order. When you are finished making changes, click on the **Close** icon or the **[x]** on the guide's tab.

You are first asked for a form name. This will be the name of your order guide.

Then you are asked if the guide is for the customer that was active when it was created (Great Moon Buffet-Robert St) or if it should be a standard guide that can be seen by everyone. This allows you to take a "classic customer" and use their inventory to create an order guide you can use for new customers who serve a similar style of food.



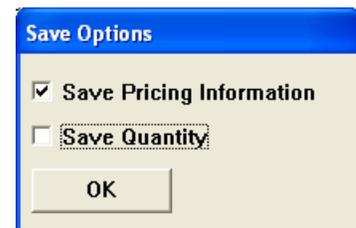
The dialog box is titled "Close Order Guide". It contains a "Form Name:" label followed by an empty text input field. Below the input field are two radio button options: "Standard" (unselected) and "GMBR GREAT MOON BUFFET-ROBERT ST" (selected). At the bottom of the dialog are three buttons: "Save", "Discard", and "Cancel".

If you started with the Public Customer Reference as your customer, you will only have the **Standard** option.

Like an order, you can click **[Yes]** to close and save the guide, **[No]** to close the guide without saving it, or **[Cancel]** to return to the guide.

There is no option to mark this Ready to Send, because it isn't an order.

You are then asked if you want to save the quantities and pricing that you've changed for this order guide. In general, you want to save the pricing if you've modified them in any way.



The dialog box is titled "Save Options". It contains two checkboxes: "Save Pricing Information" (checked) and "Save Quantity" (unchecked). Below the checkboxes is an "OK" button.

It is generally not a good idea to save quantity. Usually either every product will have a quantity because that is how you added them to the order guide, or you used quantity to sort the items. Either way, you don't want to save those quantities, otherwise you'll order the same item whenever you open the guide.

Click **OK** to save the guide.

## Changing Order Guides

To change an order guide, click on the **Work With** ribbon tab and click the **Order Guide** icon.

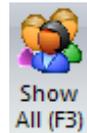


If you want to maintain an order guide, you must have the customer that “owns” the guide active. Click on the **Find Customer** icon and double-click on a customer or the Public Customer Reference if the order guide is a global one.



Click on the **Maintain Order Guides** icon.

Double-click on the name of the guide to edit. To edit a standard order guide, click the **Show All** button.



Customer O/G	Last Update	Lines	
Pickup Window	6/30/2013 1:10:	16	

Once the guide is open, you can add item, remove items, or re-sequence the guide.

## Deleting Order Guides

**You cannot recover deleted Order Guides. Use caution.**

To delete an order guide, open the order guide list, as above. Select the guide you wish to delete. Click the **Delete** button.



## Using Export/Import to Create Order Guides

Let's say that you have a customer of a particular type, a white table cloth Chinese restaurant, for example. The customer has been with you long-term, and buys most of their stuff from you. They have an excellent history. You want to use that history to create an order guide for potential similar customers. You can use the Export/Import feature to copy a customer's history to a global order guide.

1. Open the Orders category.
2. Select the customer which has the history guide you want to use. Set this customer active.
3. Open the customer's history.
4. Use the Export function to export the history to a file (not to Excel).

5. Switch to the Order Guides category.
6. Select the Public Customer Option.
7. Start a New Order Guide.
8. Use the Import function to import the previously saved file into the new guide.
9. Add or delete items as desired. Change the sequence as desired.
10. Save the order guide.

You can now use this order guide to promote to prospective customers.

# Creating Reports with Excel

POET has the ability to export information into Excel and import it back from Excel into POET. However the data that it exports is not optimized for your customers. To do this you have a custom Export Macro. You can use this feature to create reports of A/R Information, Orders, and Order Guides. You can send an Order or Order Guide to your customer, who can use it to create an order. The important thing to remember in Creating Reports to Excel is the magic keystrokes: **Ctrl-J**.



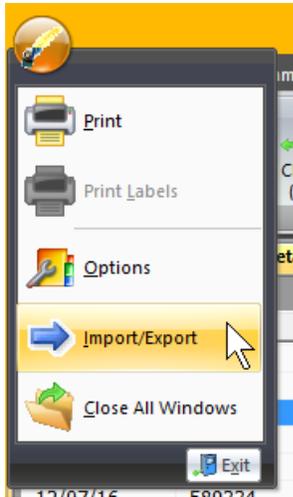
## The A/R Detail Report

Begin by opening the Accounts Receivable workwith. Select a customer and open the A/R Detail.

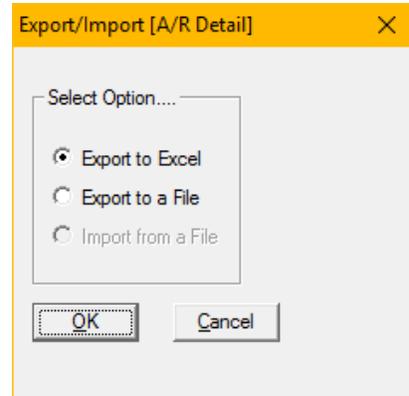
Date	Invoice#	Amount	Running Total
01/04/17	062414	-63.20	-63.20
12/05/16	589181	822.68	759.48
12/05/16	589181	1725.34	2484.82
12/06/16	589209	5735.77	8230.59
12/06/16	589210	866.48	9097.07
12/07/16	589234	2719.75	11816.82
12/07/16	589335	523.78	12340.60
12/08/16	589396	1444.26	13784.86
12/08/16	589397	198.59	13983.45
12/09/16	589458	1026.01	15009.46
12/09/16	589459	197.24	15206.70
12/12/16	589590	367.48	15574.18
12/12/16	589591	1097.96	16672.14
12/13/16	589622	384.89	17057.03
12/13/16	589623	1660.44	18717.47
12/14/16	589751	1522.19	20240.66
12/14/16	589752	130.89	20371.55
12/15/16	589794	88.80	20460.35
12/15/16	589795	714.84	21175.19
01/03/17	590729	632.00	21807.19
01/03/17	590730	722.25	22529.44
01/04/17	590835	413.83	22943.27
01/05/17	590924	465.40	23408.67

Press **Ctrl-J**. This will display hidden fields that contain customer information you need to process the A/R Detail report.

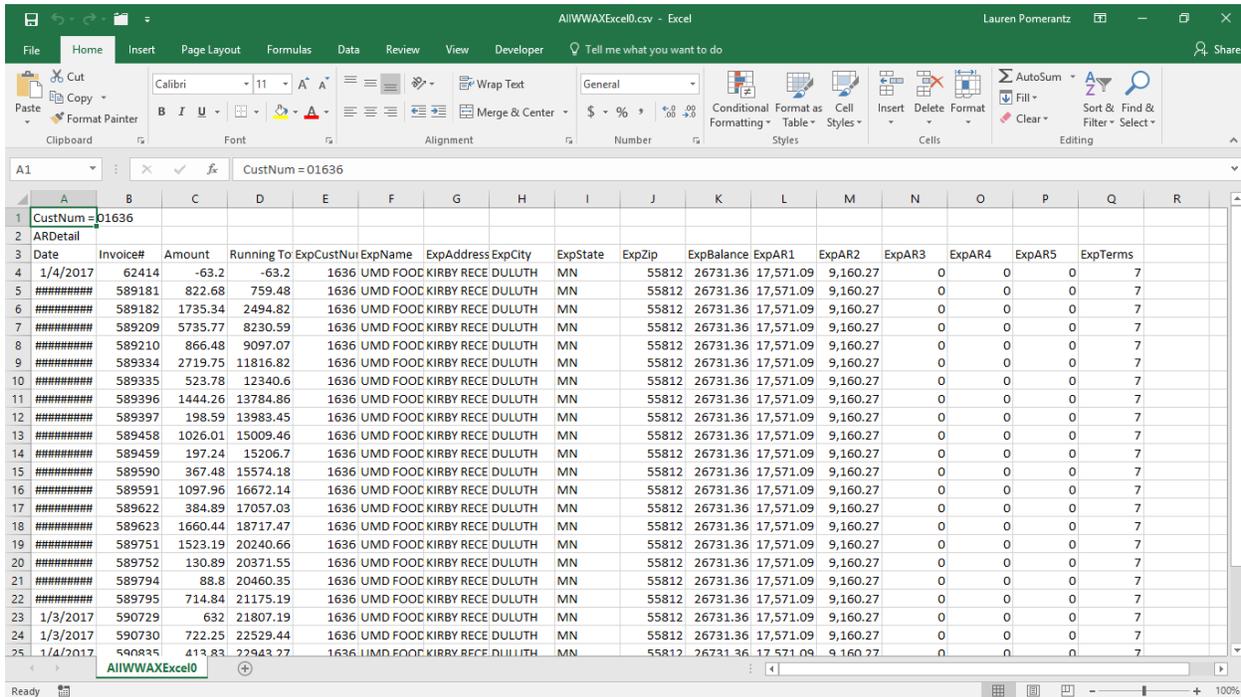
Date	Invoice#	Amount	Running Total	ExpCudNum	ExpName	ExpAddress	ExpCity	ExpState	ExpZip	ExpBalance	ExpAR1	ExpAR2
01/04/17	062414	-63.20	-63.20	01636	UMD FOC	KIRBY REC	DULUT	MN	55812	26731.36	17.57	9.160
12/05/16	589181	822.68	759.48	01636	UMD FOC	KIRBY REC	DULUT	MN	55812	26731.36	17.57	9.160
12/05/16	589181	1725.34	2484.82	01636	UMD FOC	KIRBY REC	DULUT	MN	55812	26731.36	17.57	9.160
12/06/16	589209	5735.77	8230.59	01636	UMD FOC	KIRBY REC	DULUT	MN	55812	26731.36	17.57	9.160
12/06/16	589210	866.48	9097.07	01636	UMD FOC	KIRBY REC	DULUT	MN	55812	26731.36	17.57	9.160
12/07/16	589234	2719.75	11816.82	01636	UMD FOC	KIRBY REC	DULUT	MN	55812	26731.36	17.57	9.160
12/07/16	589335	523.78	12340.60	01636	UMD FOC	KIRBY REC	DULUT	MN	55812	26731.36	17.57	9.160
12/08/16	589396	1444.26	13784.86	01636	UMD FOC	KIRBY REC	DULUT	MN	55812	26731.36	17.57	9.160
12/08/16	589397	198.59	13983.45	01636	UMD FOC	KIRBY REC	DULUT	MN	55812	26731.36	17.57	9.160
12/09/16	589458	1026.01	15009.46	01636	UMD FOC	KIRBY REC	DULUT	MN	55812	26731.36	17.57	9.160
12/09/16	589459	197.24	15206.70	01636	UMD FOC	KIRBY REC	DULUT	MN	55812	26731.36	17.57	9.160
12/12/16	589590	367.48	15574.18	01636	UMD FOC	KIRBY REC	DULUT	MN	55812	26731.36	17.57	9.160
12/12/16	589591	1097.96	16672.14	01636	UMD FOC	KIRBY REC	DULUT	MN	55812	26731.36	17.57	9.160
12/13/16	589622	384.89	17057.03	01636	UMD FOC	KIRBY REC	DULUT	MN	55812	26731.36	17.57	9.160
12/13/16	589623	1660.44	18717.47	01636	UMD FOC	KIRBY REC	DULUT	MN	55812	26731.36	17.57	9.160
12/14/16	589751	1522.19	20240.66	01636	UMD FOC	KIRBY REC	DULUT	MN	55812	26731.36	17.57	9.160
12/14/16	589752	130.89	20371.55	01636	UMD FOC	KIRBY REC	DULUT	MN	55812	26731.36	17.57	9.160
12/15/16	589794	88.80	20460.35	01636	UMD FOC	KIRBY REC	DULUT	MN	55812	26731.36	17.57	9.160
12/15/16	589795	714.84	21175.19	01636	UMD FOC	KIRBY REC	DULUT	MN	55812	26731.36	17.57	9.160
01/03/17	590729	632.00	21807.19	01636	UMD FOC	KIRBY REC	DULUT	MN	55812	26731.36	17.57	9.160
01/03/17	590730	722.25	22529.44	01636	UMD FOC	KIRBY REC	DULUT	MN	55812	26731.36	17.57	9.160
01/04/17	590835	413.83	22943.27	01636	UMD FOC	KIRBY REC	DULUT	MN	55812	26731.36	17.57	9.160



Go to the POET menu in the upper left corner. Select **Import/Export**. Select the option to **Export to Excel** and click **OK**.

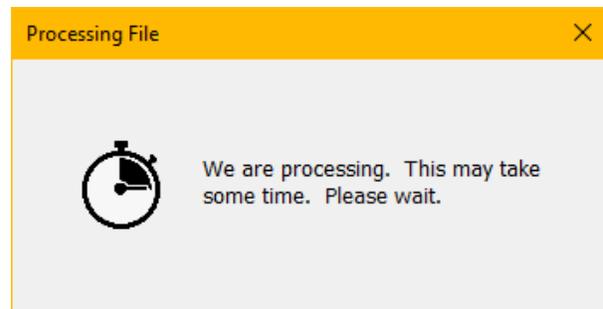


Excel opens, but the layout is "raw." It is all of the data, along with other information from POET. It needs to be cleaned up.

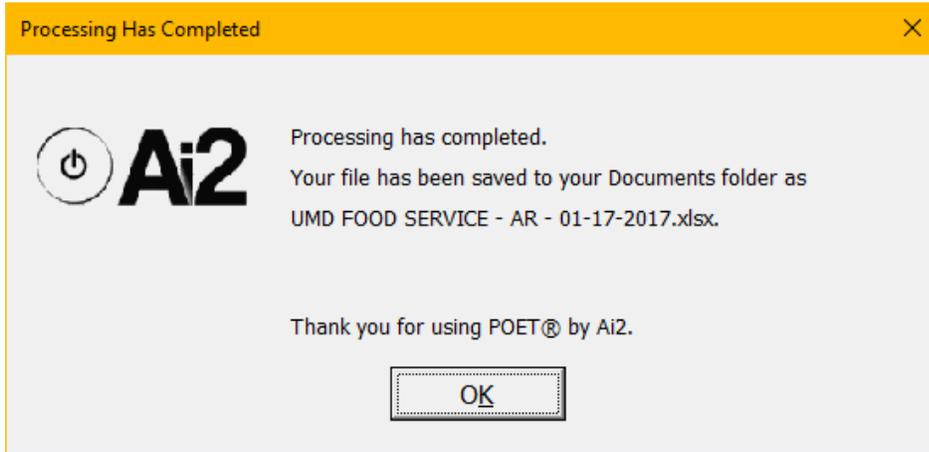


Press **Ctrl-J**.

A dialog box informs you that POET is processing.



When processing has finished, the dialog box changes to tell you that it has completed. The file is placed in your Documents folder with the customer's name and date attached.



The A/R Detail will have the customer's name, address, and terms on the left; your name and contact information on the right; aging underneath, and then the statement information.

**Customer Statement**

UMD FOOD SERVICE KIRBY RECEIVING DOCK DULUTH, MN 55812 Customer Number: 1636 Terms: PAY BY STATEMENT		Sales Rep: Lauren Pomerantz 313 E 13th St Hibbing, MN 55746 (218) 263-8991
--	--	---

A/R			Period 1	Period 2	Period 3	Period 4
Balance	Current		Past Due	Past Due	Past Due	Past Due
\$26,731.36	\$17,571.09		\$9,160.27	\$0.00	\$0.00	\$0.00

Date	Invoice#	Type	Amount	Subtotal
12/05/2016	589181	Invoice	822.68	822.68
12/05/2016	589182	Invoice	1,735.34	2,558.02
12/06/2016	589209	Invoice	5,735.77	8,293.79
12/06/2016	589210	Invoice	866.48	9,160.27
12/07/2016	589334	Invoice	2,719.75	11,880.02
12/07/2016	589335	Invoice	523.78	12,403.80
12/08/2016	589396	Invoice	1,444.26	13,848.06
12/08/2016	589397	Invoice	198.59	14,046.65
12/09/2016	589438	Invoice	1,026.01	15,072.66
12/09/2016	589458	Invoice	197.24	15,269.90
12/12/2016	589590	Invoice	367.48	15,637.38
12/12/2016	589591	Invoice	1,097.96	16,735.34
12/13/2016	589622	Invoice	384.89	17,120.23
12/13/2016	589623	Invoice	1,680.44	18,780.67
12/14/2016	589751	Invoice	1,323.19	20,303.86
12/14/2016	589752	Invoice	130.89	20,434.75
12/15/2016	589794	Invoice	88.80	20,523.55
12/15/2016	589795	Invoice	714.84	21,238.39
01/03/2017	590729	Invoice	632.00	21,870.39
01/03/2017	590730	Invoice	722.25	22,592.64
01/04/2017	62414	Credit	-63.20	22,529.44
01/04/2017	590835	Invoice	413.83	22,943.27
01/05/2017	590924	Invoice	463.40	23,406.67
01/05/2017	590925	Invoice	2,468.85	25,875.52
01/06/2017	590954	Invoice	476.81	26,352.33
01/06/2017	590955	Invoice	377.03	26,731.36

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## Order and Order Guide Reports

You can use an Order or Order Guide to create a report for your customers. Go to the Order or Order Guides workwith and select the desired customer. Open the Order or Order Guide.

Active:(Order[01520]) [01520 SUPER-1 #525 MEAT HIBBING] - Sales Rep Order Entry

Work With Communications Orders Active Windows Style

Find Customer Order[01520]

<Enter Order Quantity>

WWP	Item#	Qty	Pack & Size:	Type:	Brand:	Description:	Sell	Extend\$	P	QOH:	C/W:	Last \$
2	10807		14-1#	CSE	FRABON	BACON APPLE 8/10CT RETAI*	4.39		B	6	/L	4.39
2	10808		1-1#	PCE	FRABON	BACON APPLE 8/10CT RETAI*	4.39		B	80	/L	4.39
3	10800		12-2#	CSE	FRABON	BACON DOUBLE SMOKE THICK*	103.08		B	19		97.06
2	10801		1-2#	PCE	FRABON	BACON DOUBLE SMOKE THICK*	8.59		B	228		8.09
2	10802		14-1#	CSE	FRABON	BACON PLTR 8/10CT RETAIL*	4.29		B	1	/L	4.29
2	10803		1-1#	PCE	FRABON	BACON PLTR 8/10CT RETAIL*	4.29		B	7	/L	4.29
2	80010		1-50CT	BOX	VISTA	CASING NIPPI FRESH 20MM	204.55		Z			204.55
3	36000		16-1.25#	CSE	LAACK	CHEESE COLBY JACK CHUNK*	3.19		B	14	/L	3.19
3	33705		4-5#	CSE	LAACK	CHEESE STRING SMOKED*	71.50		B	6		71.50
3	33700		4-5#	CSE	LAACK	CHEESE STRING*	69.50		B	10		69.50
3	51140		12-1#	CSE	OLSON	COD SALT IN BOX*	99.00		B	4		99.00
1	68572		6-22.4OZ	CSE	KRONOS	GYROS KIT	39.52		B	16		39.52
3	12710		6-4/5#	CSE	FRABON	HAM PIT 1/2 CUT BNLS*	3.09		B	52	/L	2.99
3	12705		12-2/3#	CSE	FRABON	HAM PIT 1/4 CUT BNLS*	3.29		B	73	/L	3.19
3	12700		3-10/12#	CSE	FRABON	HAM PIT WHOLE BNLS*	2.99		B	43	/L	2.89
2	10026		1-2#	PCE	FRABON	HAM SLICED PIT 1-2 LB*	9.45		Z	178		7.59
1	10025		6-2#	CSE	FRABON	HAM SLICED PIT 6-2 LB*	45.54		B	30		45.54
1	10045		17-7/8OZ	CSE	FRABON	HAM STEAK BNLS 7-8OZ*	3.99		B	14	/L	3.99
1	10055		16/14 OZ	CSE	FRABON	HAM STEAKS BNLS 12-14 OZ*	3.99		B	10	/L	3.99
1	26680		24-15 OZ	CSE	FRABON	PASTY BEEF & PORK W/CARR*	59.76		B	120		59.76

Lines:55 for \$0.00 Cse:0 Ech:0

Press **Ctrl-J**. This will display hidden fields that contain customer information you need to process the report. The fields are on the far right. You can scroll over to see them, but if you look at the scrollbar at the Order or Order Guide, you will see it get shorter, indicating the information is now longer.

Active:(Order[01520]) [01520 SUPER-1 #525 MEAT HIBBING] - Sales Rep Order Entry

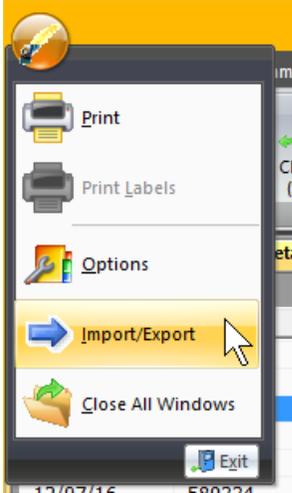
Work With Communications Orders Active Windows Style

Find Customer Order[01520]

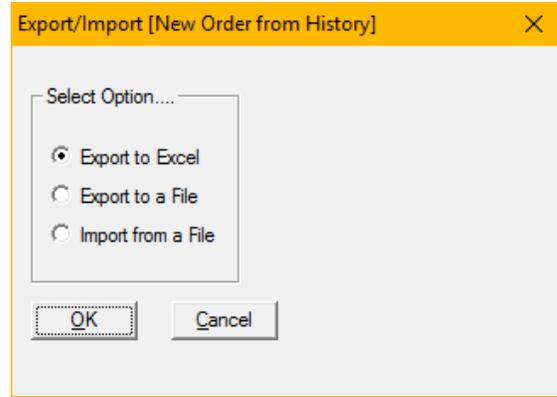
<Enter Order Quantity>

WWP	Item#	Qty	Pack & Size:	Type:	Brand:	Description:	Sell	Extend\$	P	QOH:	C/W:	Last \$
2	10807		14-1#	CSE	FRABON	BACON APPLE 8/10CT RETAI*	4.39		B	6	/L	4.39
2	10808		1-1#	PCE	FRABON	BACON APPLE 8/10CT RETAI*	4.39		B	80	/L	4.39
3	10800		12-2#	CSE	FRABON	BACON DOUBLE SMOKE THICK*	103.08		B	19		97.06
2	10801		1-2#	PCE	FRABON	BACON DOUBLE SMOKE THICK*	8.59		B	228		8.09
2	10802		14-1#	CSE	FRABON	BACON PLTR 8/10CT RETAIL*	4.29		B	1	/L	4.29
2	10803		1-1#	PCE	FRABON	BACON PLTR 8/10CT RETAIL*	4.29		B	7	/L	4.29
2	80010		1-50CT	BOX	VISTA	CASING NIPPI FRESH 20MM	204.55		Z			204.55
3	36000		16-1.25#	CSE	LAACK	CHEESE COLBY JACK CHUNK*	3.19		B	14	/L	3.19
3	33705		4-5#	CSE	LAACK	CHEESE STRING SMOKED*	71.50		B	6		71.50
3	33700		4-5#	CSE	LAACK	CHEESE STRING*	69.50		B	10		69.50
3	51140		12-1#	CSE	OLSON	COD SALT IN BOX*	99.00		B	4		99.00
1	68572		6-22.4OZ	CSE	KRONOS	GYROS KIT	39.52		B	16		39.52
3	12710		6-4/5#	CSE	FRABON	HAM PIT 1/2 CUT BNLS*	3.09		B	52	/L	2.99
3	12705		12-2/3#	CSE	FRABON	HAM PIT 1/4 CUT BNLS*	3.29		B	73	/L	3.19
3	12700		3-10/12#	CSE	FRABON	HAM PIT WHOLE BNLS*	2.99		B	43	/L	2.89
2	10026		1-2#	PCE	FRABON	HAM SLICED PIT 1-2 LB*	9.45		Z	178		7.59
1	10025		6-2#	CSE	FRABON	HAM SLICED PIT 6-2 LB*	45.54		B	30		45.54
1	10045		17-7/8OZ	CSE	FRABON	HAM STEAK BNLS 7-8OZ*	3.99		B	14	/L	3.99
1	10055		16/14 OZ	CSE	FRABON	HAM STEAKS BNLS 12-14 OZ*	3.99		B	10	/L	3.99
1	26680		24-15 OZ	CSE	FRABON	PASTY BEEF & PORK W/CARR*	59.76		B	120		59.76

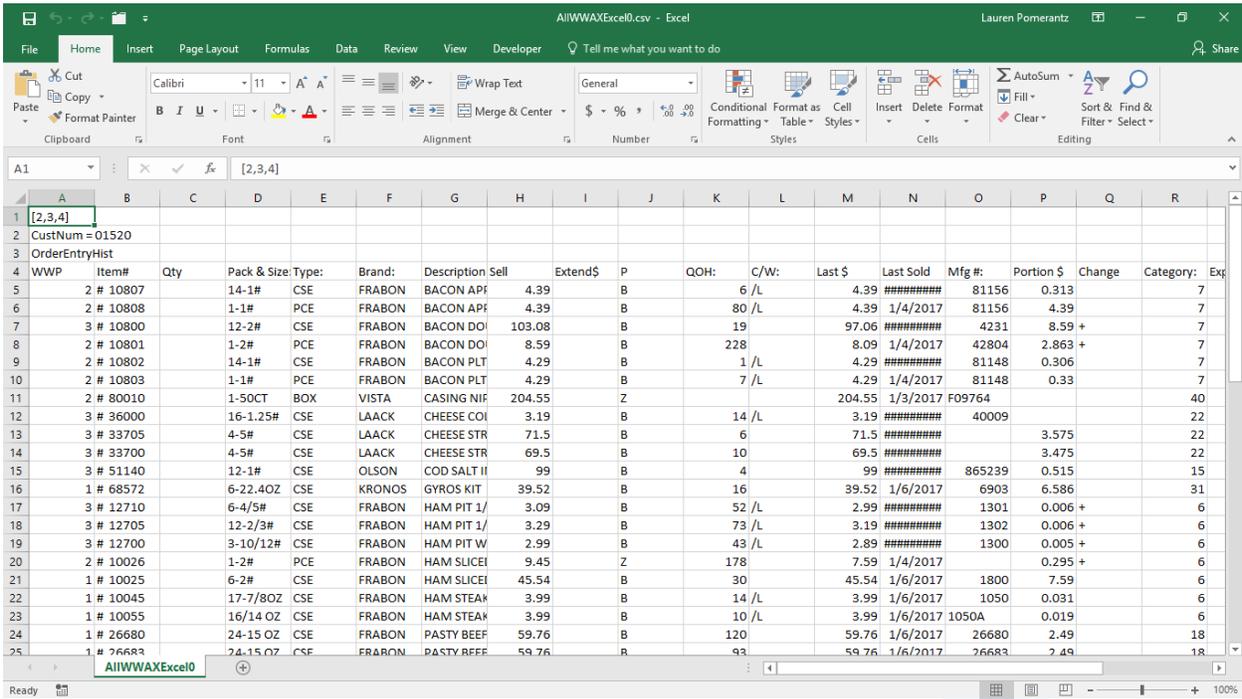
Lines:55 for \$0.00 Cse:0 Ech:0



Go to the POET menu in the upper left corner. Select **Import/Export**. Select the option to **Export to Excel** and click **OK**.

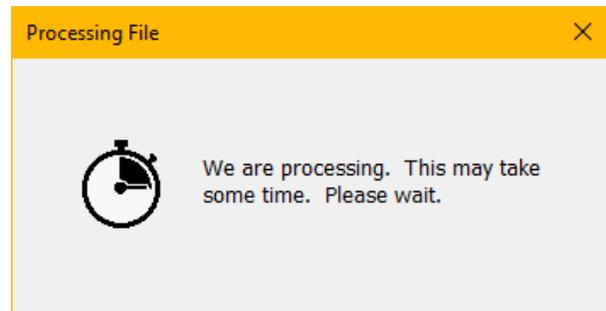


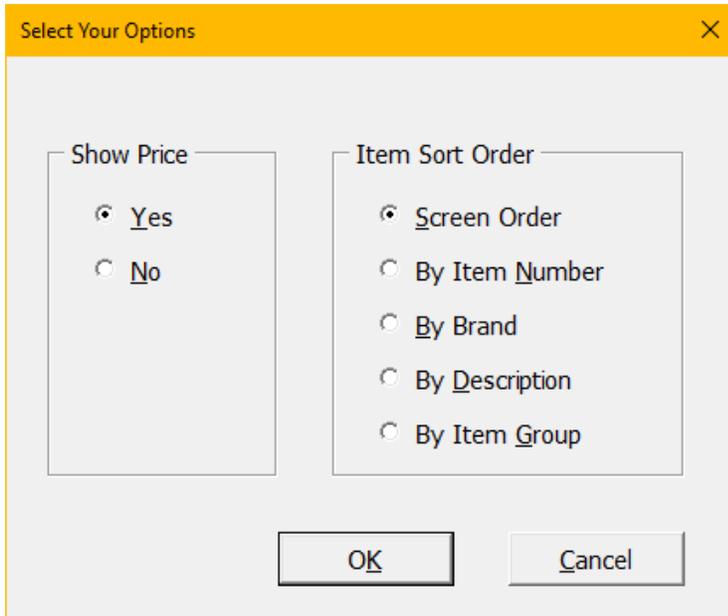
Excel opens, but the layout is "raw." It is all of the data, along with other information from POET. It needs to be cleaned up.



Press **Ctrl-J**.

A dialog box informs you that POET is processing.

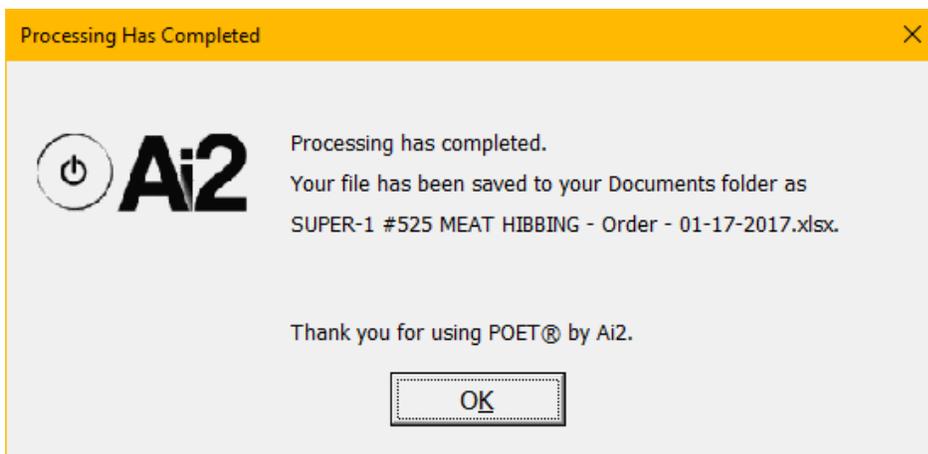




A menu of options appears. This is the one for orders. You must decide whether to show prices or not, and in what sequence to sort the items.

- Screen Order is the sequence that the items are in when they export from Excel.
- If you select Item Group, the items will be sorted by group and the group names will be inserted.

When processing has finished, the dialog box changes to tell you that it has completed. The file is placed in your Documents folder with the customer's name and date attached.



The exported Order or Order Guide will have the customer's name and account number at the top, you contact information under the header, and the item information in the sequence you selected. If you chose to display prices, the price and portion price are shown and there are four weeks for ordering. If you chose not to show prices, the price and portion price are omitted, and there will be six weeks for ordering.



1520: SUPER-1 #525 MEAT HIBBING  
1101 E 37TH STREET  
HIBBING, MN 55746

Fraboni Wholesale Distributors, Inc.  
315 E 13th St  
Hibbing, MN 55746

Created: 1/17/2017

(218) 263-8991

Fax: (218) 263-6617

Sales Rep: Lauren Pomerantz | (312) 920-9366  
CS#: Bob Benson | (800) 835-3200

lap@aiz.com  
rab@aiz.com

\*\*\*\* Prices Subject to Change \*\*\*\*

Brand	Description	Pack	C/W	Item Number	Price	Portion \$	Wk1	Wk2	Wk3	Wk4
FRABON	BACON APPLE 8/10CT RETAIL*	14-1#	/L	# 10807	4.59	0.513				
FRABON	BACON APPLE 8/10CT RETAIL*	1-1#	/L	# 10806	4.59	4.59				
FRABON	BACON DOUBLE SMOKE THICK*	12-2#		# 10800	105.00	8.59				
FRABON	BACON DOUBLE SMOKE THICK*	1-2#		# 10801	8.59	2.885				
FRABON	BACON PLTR 8/10CT RETAIL*	14-1#	/L	# 10802	4.29	0.506				
FRABON	BACON PLTR 8/10CT RETAIL*	1-1#	/L	# 10805	4.29	0.53				
VISTA	CASINO NIPP FRESH 20MM	1-80CT		# 80030	204.55					



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rab@aiz.com

Brand	Description	Pack	C/W	Item Number	Price	Portion \$	Wk1	Wk2	Wk3	Wk4	Wk5	Wk6
<b>6 PORK-HAMS</b>												
FRABON	HAM PIT 1/2 CUT SNLS*	6-4/5#	/L	# 12710								
FRABON	HAM PIT 1/4 CUT SNLS*	12-2/5#	/L	# 12708								
FRABON	HAM PIT WHOLE SNLS*	5-10/12#	/L	# 12700								
FRABON	HAM SLICED PIT 1-2 LB*	1-2#		# 10026								
FRABON	HAM SLICED PIT 6-2 LB*	6-2#		# 10025								
FRABON	HAM STEAK SNLS 7-8OZ*	17-7/8OZ	/L	# 10045								
FRABON	HAM STEAK SNLS 12-14OZ*	16/14 OZ	/L	# 10055								
<b>7 PORK-CHOPS/BACON</b>												
FRABON	BACON APPLES/10CT RETAIL*	14-1#	/L	# 10807								
FRABON	BACON APPLES/10CT RETAIL*	1-1#	/L	# 10806								
FRABON	BACON DOUBLE SMOKE THICK*	12-2#		# 10800								
FRABON	BACON DOUBLE SMOKE THICK*	1-2#		# 10801								
FRABON	BACON PLTR 8/10CT RETAIL*	14-1#	/L	# 10802								
FRABON	BACON PLTR 8/10CT RETAIL*	1-1#	/L	# 10805								

Printed 1/17/2017

1520: SUPER-1

**12 SAUSAGE-FRABONI**

FRABON	SAUSAGE BRAT WILD RICE CK	12-1#		# 3020								
FRABON	SAUSAGE BRAT WILD RICE CK	1-1#		# 3021								
FRABON	SAUSAGE BRATWURST CKRTL	12-1#		# 2535								
FRABON	SAUSAGE BRATWURST CKRTL	1-1#		# 2536								
FRABON	SAUSAGE BULK CHORIZO 12OZ	16-12 OZ		# 3008								
FRABON	SAUSAGE CHED DELITES RTL	16-14 OZ		# 1500								
FRABON	SAUSAGE CHED DELITES RTL	1-14 OZ		# 1501								
FRABON	SAUSAGE CHIX BRAT W/R	12-1#		# 1965								
FRABON	SAUSAGE CHIX BRAT W/R	1-1#		# 1966								
FRABON	SAUSAGE HOT ITALIAN TRAY	12-1#		# 1700								
FRABON	SAUSAGE MILD ITALIAN TRAY	12-1#		# 2050								
FRABON	SAUSAGE POUISH 6-1 RETAIL	12-1#		# 1520								
FRABON	SAUSAGE POUISH DELITE RTL	16-14 OZ		# 1480								

Printed 1/17/2017

1520: SUPER-1 #525 MEAT HIBBING

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## Special Uses for Order Guide Reports

You can create an order sheet for a customer using an Order Guide instead of their Order History. But there are other users for Order Guide Reports. For example, you can take an existing customer's history and pricing and use that to promote to potential customers or to quote prices for new customers. When you export an Order Guide, the options box changes to help you do this.

Start by selecting the necessary customer, or No Customer Active for a Standard Guide. Open the desired guide and **press Ctrl-J** to display customer information. Using the POET menu, export to Excel. Press **Ctrl-J** to start the processing.

When the options box appears, it asks you to provide the guide name. If the Order Guide belonged to a specific customer, the default name is the customer number and name. If the Order Guide was a Standard Guide, the default name is "Order Guide." You can enter any other name you want. For example, this guide is a list of appetizers, so a good name would be "Appetizer List." Click **Clear Text** and enter a new guide name, if desired.

Select Your Options

Show Price

Yes

No

Item Sort Order

Screen Order

By Item Number

By Brand

By Description

By Item Group

This order guide has no customer attached. Please enter a Guide name. The default is "Order Guide."

Order Guide

Clear Text

OK

Cancel

Processing Has Completed



Processing has completed.  
Your file has been saved to your Documents folder as  
Appetizer List - OrderGuide - 01-17-2017.xlsx.

Thank you for using POET® by Ai2.

OK

Brand	Description	Pack	Q/W	Item Number	Price	Portion \$	WK1	WK2	WK3	WK4
ANCHOR	APTZ CALIF BATTERED	6-5#		# 24 102	44.00					
ANCHOR	APTZ DIPPER SPIN & ANTR	10-12.15		# 24 105	45.00					
ANCHOR	APTZ DIPPER BEEFY NACHOR	10-12.15		# 24 107	45.00					
ANCHOR	APTZ MOZZ STX BRD	4-5#		# 27 515	52.00					
ANCHOR	APTZ MOZZ STX BRD	6-4#		# 27 517	104.00					
ANCHOR	APTZ MOZZ STX MINI	6-45 OZ		# 27 552	77.00					
ANCHOR	APTZ JALP STU FORMICHE OVR	6-32 OZ		# 28 060	52.00					
APPEKT	APTZ HAM & CHEESE WICHES*	1-6#		# 28 400	45.00					
BENAR	APTZ RAVIOU BRD CHEESE*	3-5#		# 49 254	54.00					
BREWCT	APTZ MAGN-JACK BITES	4-2#		# 27 440	28.00					
BREWCT	APTZ MAGN-JACK BITES	1-2#		# 27 441	5.00					
FMI	APTZ BOO ROLL PORK 2 OZ*	1-15#		# 25 902	52.00					
FMI	APTZ BOO ROLL CHX 2 OZ*	1-15#		# 25 925	52.00					
FMI	APTZ BOO ROLL VED 2 OZ*	1-15#		# 25 925	52.00					
FMI	APTZ MOZZ ST CK BRD OVN TR	6-4#		# 27 447	47.00					
FRABONI	APTZ PASTY MINI W/ CARMOT*	26-2.75		# 28 685	26.00					
FRED'S	APTZ CALIF BATTERED PERF	1-2#		# 24 151	5.00					
FRED'S	APTZ CALIF D/WER BUD BRD	6-4#		# 24 100	55.00					
FRED'S	APTZ CALIF D/WER BUD BRD	1-4#		# 24 101	10.00					
FRED'S	APTZ CALIF BATTERED PERF	6-2#		# 24 130	28.00					
FRED'S	APTZ HOWLER CHED CHOR	4-5#		# 24 257	51.00					
FRED'S	APTZ CUMD WHITE CHE DDAR*	6-2#		# 24 280	55.00					
FRED'S	APTZ BURRITO SP/BNMNR	4-4#		# 27 000	60.00					
FRED'S	APTZ ZUCCHINI ST CK SATR	6-2#		# 27 442	25.00					
FRED'S	APTZ MAC & CHEESE BITES	6-2#		# 27 445	54.00					
FRED'S	APTZ MAC & CHEESE BITES	1-2#		# 27 446	9.00					
FRED'S	APTZ MOZZ STX BREADED	6-4#		# 27 450	100.00					
FRED'S	APTZ MOZZ STX BREADED	1-4#		# 27 451	16.00					
FRED'S	APTZ JALP CHE SITE BRDR	6-2#		# 27 452	45.00					
FRED'S	APTZ ASPARAGUS FRIES SATR	6-2#		# 27 455	60.00					
FRED'S	APTZ MOZZ ST CK ITALIAN*#	6-4#		# 27 457	100.00					
FRED'S	APTZ BEAN GREEN BATTERED	6-2#		# 27 455	55.00					
FRED'S	APTZ BEAN GREEN BATTERED	1-2#		# 27 456	9.00					
FRED'S	APTZ MOZZ STX STR PERFM	6-2#		# 27 450	55.00					
FRED'S	APTZ MOZZ STX STR PERFM	1-2#		# 27 451	9.00					
FRED'S	APTZ MOZZ ST CK PESTO	6-2#		# 27 452	55.00					

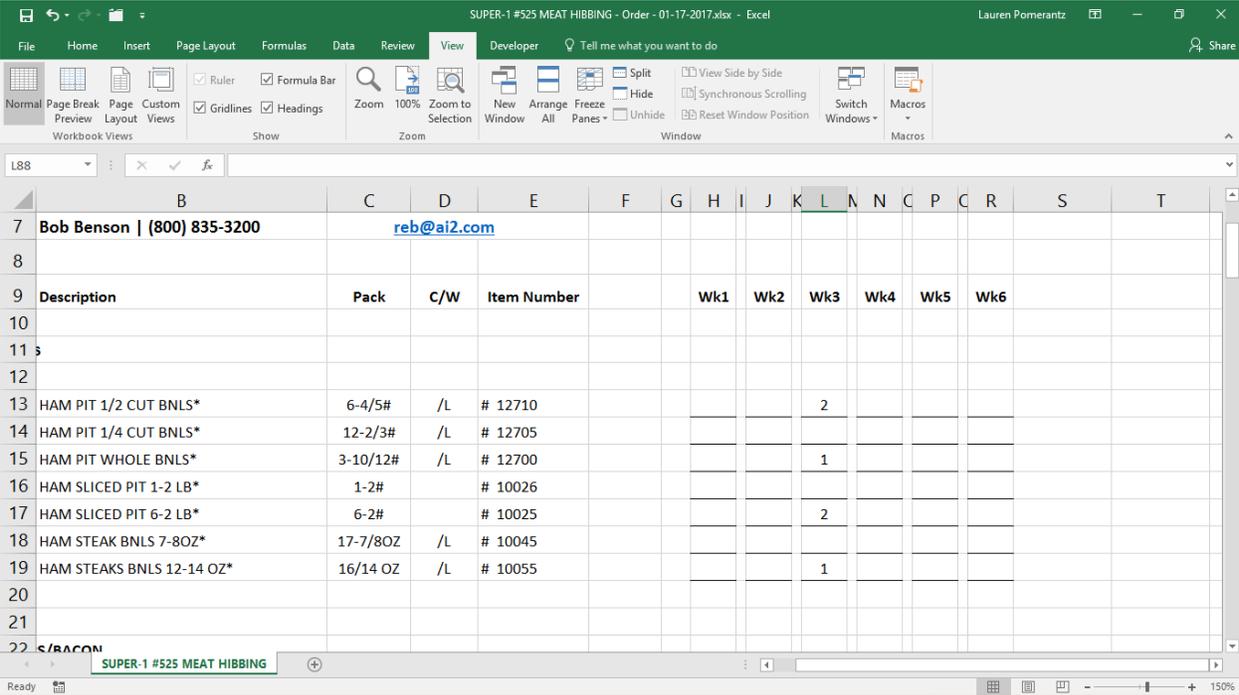
Printed 1/17/2017

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# Importing Orders from Reports

If all you could do was send your customers a cleaned up, pretty copy of an Order or Order Guide, the Export Macro would still be a very powerful tool. But its most powerful feature is the ability to import an order back into POET.

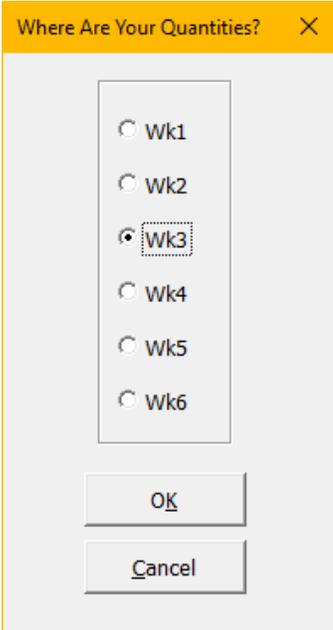
Send the completed report to your customer with the instruction to use it to create an order by setting quantities in one of the columns.



Here the customer received an Order Report with no pricing, so there are six weekly columns. The customer has entered quantities in **Wk 3**.

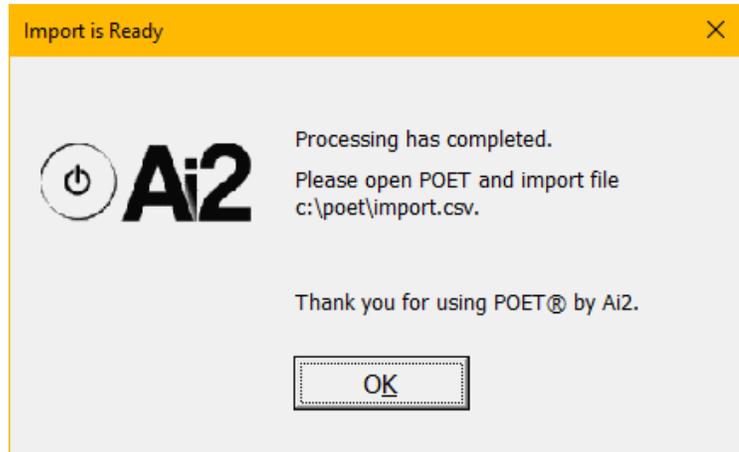
**Press Ctrl-J.**

You will be prompted for the column where the quantities are stored. Select the desired week and click **OK**.



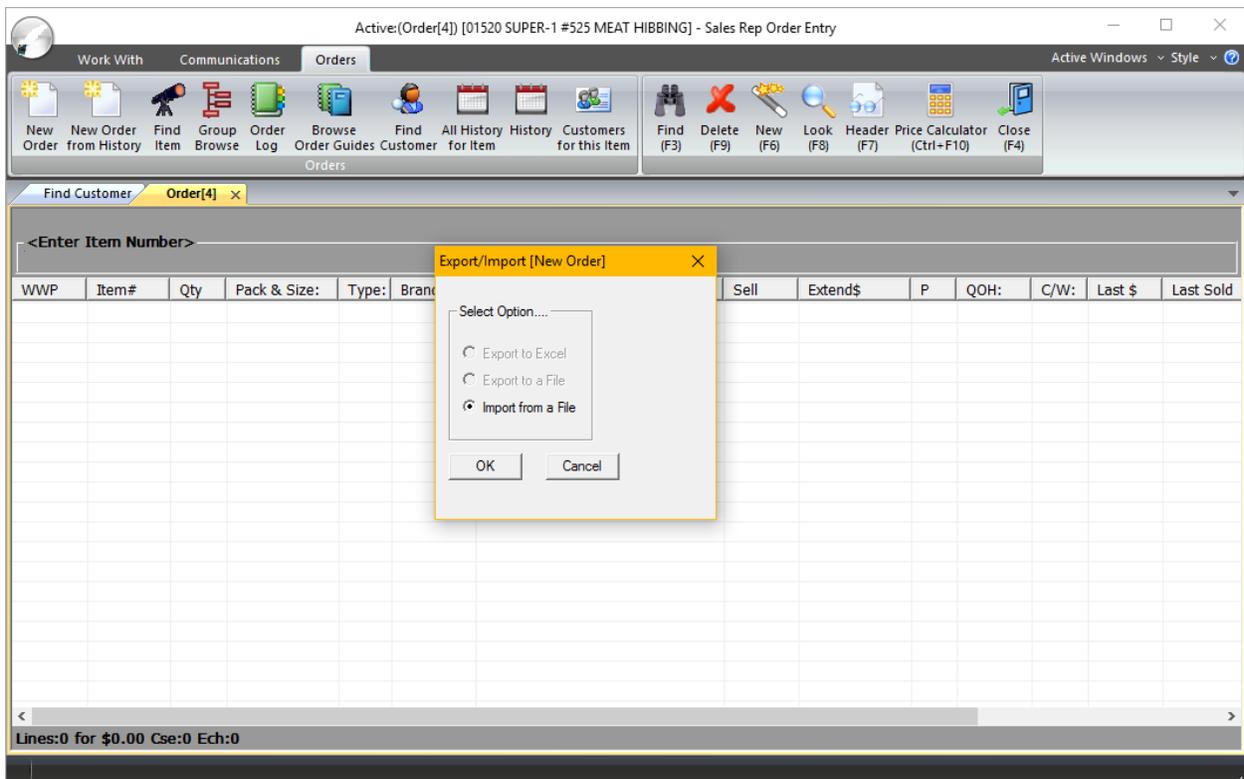
The Export Macro processes the order back into a form that POET can read. The new file is saved in the c:\poet folder with the name import.csv.

POET cannot import the file if it is left open, so when you click **OK** here, the file will close.



Go to POET and select the Orders Workwith. Find the customer that sent you the order and set them active. Open a New (blank) order.

Open the POET menu and select Import/Export. Only the **Import from a File** option will be available. Select it and click **OK**.



You will need to specify the name of the file to import. Again, this will be c:\poet\import.csv. The first time you will have to either type this into the field or click the button at the right to search for it. However, once you have done this once, POET will remember the file name next time.



When you click **OK**, POET will import the items from the import file. If any item has a quantity set that exceeds the quantity on hand, POET will warn you. Make a note of these items as they are displayed, and click **OK**.



The order is imported with the customer's quantities. Make sure you go back to any item that did not have sufficient quantity.

Active:(Order[4]) [01520 SUPER-1 #525 MEAT HIBBING] - Sales Rep Order Entry

Work With Communications Orders Active Windows Style

New Order from History Find Item Group Browse Order Log Browse Order Guides Customer All History History Customers for this Item Find Delete New Look Header Price Calculator Close (F3) (F9) (F6) (F8) (F7) (Ctrl+F10) (F4)

Find Customer Order[4]

<Enter Item Number>

WWP	Item#	Qty	Pack & Size:	Type:	Brand:	Description:	Sell	Extend\$	P	QOH:	C/W:	Last \$	Last So ^
3	12710	2	6-4/5#	CSE	FRABON	HAM PIT 1/2 CUT BNLS*	3.09	160.99	B	52	/L	2.99	12/23/;
3	12705		12-2/3#	CSE	FRABON	HAM PIT 1/4 CUT BNLS*	3.29		B	73	/L	3.19	12/23/;
3	12700	1	3-10/12#	CSE	FRABON	HAM PIT WHOLE BNLS*	2.99	89.70	B	43	/L	2.89	12/23/;
2	10026		1-2#	PCE	FRABON	HAM SLICED PIT 1-2 LB*	9.45		Z	178		7.59	01/04/;
1	10025	2	6-2#	CSE	FRABON	HAM SLICED PIT 6-2 LB*	45.54	91.08	B	30		45.54	01/06/;
1	10045		17-7/8OZ	CSE	FRABON	HAM STEAK BNLS 7-8OZ*	3.99		B	14	/L	3.99	01/06/;
1	10055	1	16/14 OZ	CSE	FRABON	HAM STEAKS BNLS 12-14 OZ*	3.99	63.84	B	10	/L	3.99	01/06/;
2	10807	2	14-1#	CSE	FRABON	BACON APPLE 8/10CT RETAI*	4.39	122.92	B	6	/L	4.39	12/30/;
2	10808		1-1#	PCE	FRABON	BACON APPLE 8/10CT RETAI*	4.39		B	80	/L	4.39	01/04/;
3	10800	1	12-2#	CSE	FRABON	BACON DOUBLE SMOKE THICK*	103.08	103.08	B	19		97.06	12/27/;
2	10801		1-2#	PCE	FRABON	BACON DOUBLE SMOKE THICK*	8.59		B	228		8.09	01/04/;
2	10802	3	14-1#	CSE	FRABON	BACON PLTR 8/10CT RETAIL*	4.29	180.18	B	1	/L	4.29	12/30/;
2	10803		1-1#	PCE	FRABON	BACON PLTR 8/10CT RETAIL*	4.29		B	7	/L	4.29	01/04/;
2	3020		12-1#	CSE	FRABON	SAUSAGE BRAT WILD RICE CK	49.08		B	10		49.08	01/03/;
2	3021		1-1#	PCE	FRABON	SAUSAGE BRAT WILD RICE CK	4.09		B	118		3.89	01/04/;
1	2335		12-1#	CSE	FRABON	SAUSAGE BRATWURST CK RTL	49.08		B	3		49.08	01/06/;
2	2336		1-1#	PCE	FRABON	SAUSAGE BRATWURST CK RTL	4.09		B	36		3.89	01/04/;
2	3005	1	16-12 OZ	CSE	FRABON	SAUSAGE BULK CHORIZO 12OZ	54.24	54.24	B	3		54.24	12/30/;
3	1500		16-14 OZ	CSE	FRABON	SAUSAGE CHED DELITES RTL	70.24		B	46		67.05	12/23/;
3	1501	1	1-14 OZ	PCE	FRABON	SAUSAGE CHED DELITES RTL	4.39	4.39	B	737		4.19	12/23/;

Lines:54 for \$1263.11 Cse:22 Ech:0

## Using a Report Import to Create Multiple Orders

You have multiple weeks on an Order Report, and you actually can use more than one at a time.

- If your customer is not going to be available to place an order next week, he can use Wk 1 for this week's order and Wk 2 for next week's order.
- If your customer has more than one delivery per week, she could use Wk 1 for an order to be delivered Tuesday and Wk 2 for an order to be delivered Friday.
- If your customer likes to have order split onto multiple invoices, he could use Wk 1 for the first invoice and Wk 2 for a second invoice.

For each of these scenarios, you would have to open the Excel spreadsheet the customer sent you and press **Ctrl-J**, selecting Wk 1 the first time and Wk 2 the second.

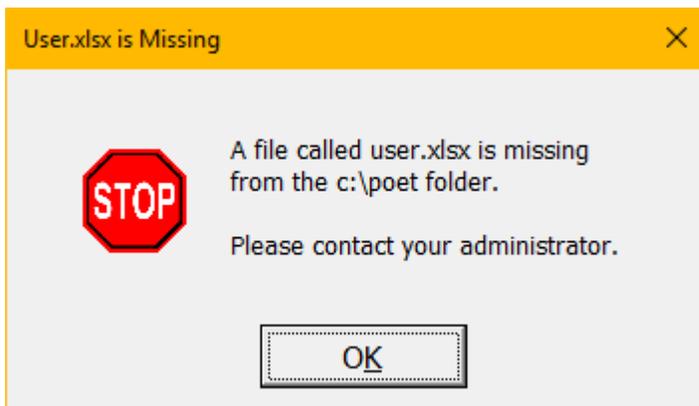
The import.csv file will be overwritten each time you run the Export Macro, so run the macro, import the resulting file into POET, and then run the macro again.

## Export Macro Errors

In order to run, the Export Macro needs three things and wants to have a fourth. If any of the critical three things are missing, you will be notified of the problem. If the fourth thing is missing, you get a warn.

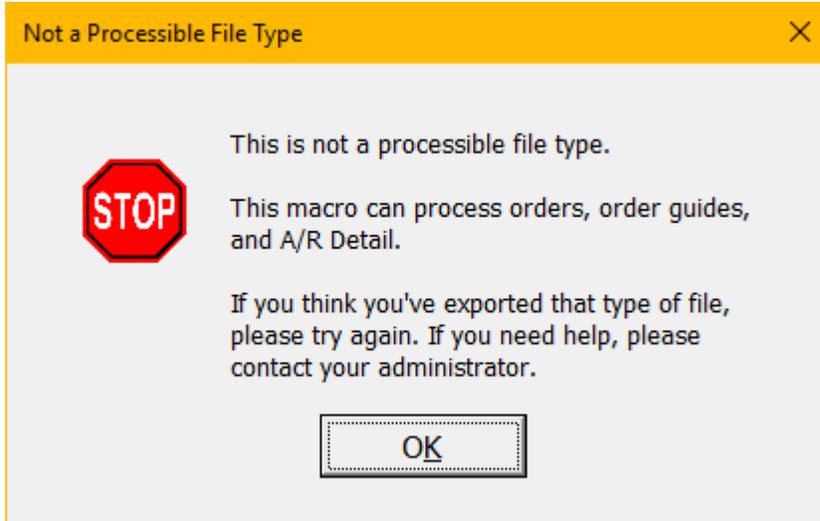
### Critical — User.xlsx

First, the macro must have a spreadsheet called user.xlsx in the c:\poet folder. This is where it finds critical information such as your name and contact information and the company name. If you try to run the macro without this information, you will be told to contact the administrator to get a copy of this file.



## Critical — Export Type Information

When POET exports data to Excel, it puts certain information into the top rows of the data. This tells the Export Macro how to handle the data. If you export the wrong screen, you will get a warning that the Export Macro cannot process this type of data.



## Critical — Customer Information

Before you export data from POET, you must press **Ctrl-J** to display the critical customer information that is used to build the report headers. If you forget to do this, the Export Macro will remind you.



## Wanted — Logo Graphic

The logo that gets inserted into the headings of your reports is a very desirable feature. If the logo is missing, the Export Macro can work around it, but you will be warned so that you can get your administrator to send it to you.



## Appetizer List

Fraboni Wholesale Distributors, Inc.

315 E 13th St  
Hibbing, MN 55746

Created: 1/17/2017

(218) 263-8991

Fax: (218) 263-6617

Sales Rep: Lauren Pomerantz | (312) 920-9366

[lp@ai2.com](mailto:lp@ai2.com)

CSR: Bob Benson | (800) 895-3200

[rb@ai2.com](mailto:rb@ai2.com)

\*\*\*\* Prices Subject to Change \*\*\*\*

### Company Logo is Missing



Your company logo is missing from  
the c:\poet folder.

Processing can continue, but please  
contact your administrator.

OK

# Customizing POET®

In most programs, you can customize the appearance of fonts and text. You can do this in POET® (see page 69 for information on changing fonts). However, you can also customize the width and sequence of columns and sort the information in panels in different ways.

## Sorting Information

Every list has a default sequence, the order in which information is displayed when you first open the panel. This is often the item number or customer number. To find a desired item quickly, you can sort by other columns.

Number	Name	Address	Phone	Total
00038			0000000000	
00102	THE 401 TAVERN	MARK LAROCHE DAN LANIO	6039268800	59
00105	7TH WAVE, INC	TALIA KHAN	9785467045	.
00110	THE 103 RESTAURANT	ERIC FARRIS	6033651820	.
00112	123 RESTAURANT & INN	ROBERT & ELAINE STONE	2073613116	.
00113	A MARKET-MANCHESTER	KIRK RAWSON	6036688445	.
00115	ABC NURSERY SCHOOL	LOIS KELLEY	9782565805	.

At the top of the columns in a panel are the column headers. When you click on one of these headers, you sort the information in the panel by that column. A small triangle appears on the right side of the header. The direction of the triangle indicates the direction of the sort. The point indicates the beginning of the alphabet or the lower numbers. The wide base represents the end of the alphabet or the higher numbers. (Alphabetically, numbers sort before letters.)

Number	Name	Address	Phone	Total
62540	108 GENERAL STORE	PO BOX 440	6033826871	24
00112	123 RESTAURANT & INN	ROBERT & ELAINE STONE	2073613116	.
54305	125 FAMILY RESTAURANT	250 CALEF HIGHWAY	6036592797	953
70405	3 PONDS CAMPGROUND		6036795350	.
70479	338 PUB-N-GRILLE, THE	PAUL CUCINATTI (RIBBERY)	7812843380	.
28320	4 SUMMER CREATIVE FOODS -	ON THE GO, MARY HARDWICK	9785267229	27
12898	40 PARK LANE (CAROLYN'S)	P O BOX 1221	9783692940	.

Clicking a second time reverses the sort.

Number	Name	Address	Phone	Total
99536	ZITA SCIPPA	SWANSON MEADOWS	9786707777	.
77600	ZAMPA	P. O. BOX 598	6036798772	.
77955	ZAFTIG'S DELICATESSEN	MARK DAVIDSON-ZAFTIG,INC.	6179750075	27
54662	ZA ZA	ORZO'S SAUGUS - PAM INC.	7812336815	387
77599	Z 1 XPRESS - CHICHESTER	JACK NASR	6037983650	.
77950	YOUTH SEVICES MGRS. <	CAMP ROTARY 9783529952	9783523163	.
77882	YORK HOSP/BETH GALLAGHER	DINING&NUTRITION SERVICES	2073634321	.

## Re-sizing Columns

Between the headers of two columns is a vertical line. When you move your mouse over this line, its appearance changes to show arrows pointing left and right. Click-and-hold and you can drag the resizing border to the left or the right to change the column size.

You can even make a column so narrow that it is virtually hidden. This can be used to hide information that you do not wish to print. (For more information on printing, see 48.)

Number	Name	Address	Phone	Total
00038			0000000000	.
00102	THE 401 TAVERN	MARK LAROCHE DAN LANIO	6039268800	59
00105	7TH WAVE, INC	TALIA KHAN	9785467045	.

You can also right-click anywhere in the column header. This will display a small menu. You can click on **<Wider>** or **>Narrower<** to change the column width by a small size.

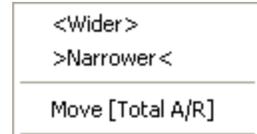
<Wider>
>Narrower<
Move [Name]
Restore

## Moving Columns

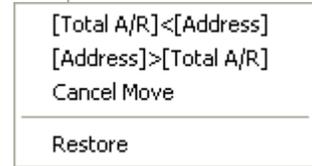
You can move a column elsewhere on a panel. Click-and-hold on the header anywhere other than the resizing border. Drag the column header into its new location and release the mouse.

Number	Name	Address	Total A/R	Phone	Total
99536	ZITA SCIPPA	SWANSON MEADOWS		9786707777	.
77600	ZAMPA	P. O. BOX 598		6036798772	.
77955	ZAFTIG'S DELICATESSEN	MARK DAVIDSON-ZAFTIG,INC.		6179750075	27
54662	ZA ZA	ORZO'S SAUGUS - PAM INC.		7812336815	387
77599	Z 1 XPRESS - CHICHESTER	JACK NASR		6037983650	.
77950	YOUTH SEVICES MGRS. <	CAMP ROTARY 9783529952		9783523163	.
77882	YORK HOSP/BETH GALLAGHER	DINING&NUTRITION SERVICES		2073634321	.

You can also move a column by right-clicking on the column header and selecting the **Move** option. The column name is displayed in square brackets.



Right-click on another panel and you will have three options. Here I right-clicked on the **Address** column. I was prompted to put **Total A/R** either to the left or right of the **Address** column. Alternatively, I could have clicked on **Cancel Move** to leave the **Total A/R** column where it was.



## Restore the Default Settings

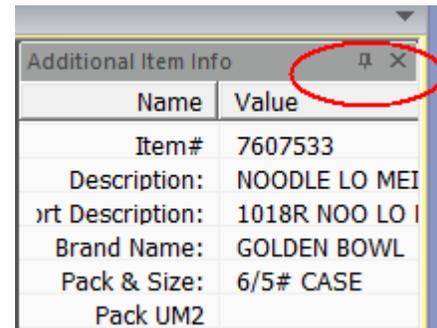
You can always delete your settings and return to the default settings by right-clicking on the header and left-clicking on **Restore**. Confirm that you want to restore the default settings, and your changes to the panel will be removed. This will not affect other panels. If you restore settings on the Customer List panel, changes made to the Order panel or Order Log panel will still be in affect.

## Unpinning, Moving, and Docking Panels

### Unpinning Panels

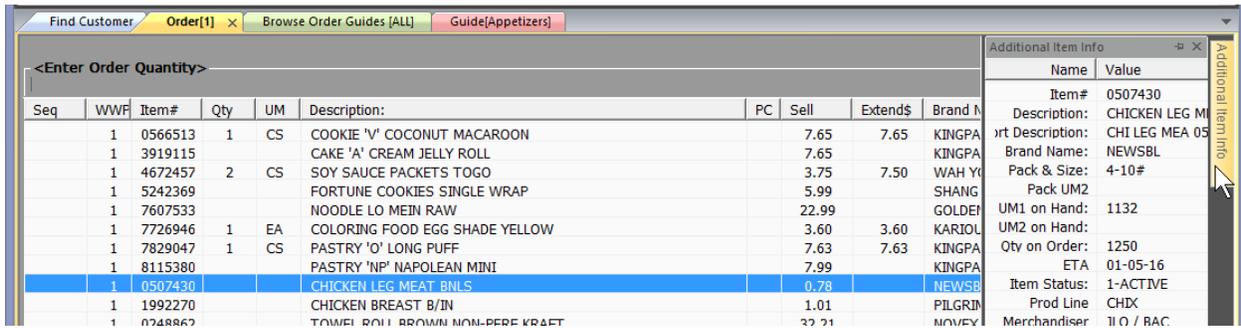
At the upper right of dockable panels are two controls, the pin and the closing x. Clicking on the x closes the panel.

When you click on the pin you unpin the panel. The panel gets hidden to the right of the pad. It shows a yellow rectangle with the panel name.



Seq	WWF	Item#	Qty	UM	Description:	PC	Sell	Extend\$	Brand Name:	UM1	UM2	Pack & Size:
1		0566513	1	CS	COOKIE 'V' COCONUT MACAROON		7.65	7.65	KINGPAS	CS		70CT
1		3919115			CAKE 'A' CREAM JELLY ROLL		7.65		KINGPAS	CS		4 ROLLS
1		4672457	2	CS	SOY SAUCE PACKETS TOGO		3.75	7.50	WAH YOAN	CS		500 COUNT
1		5242369			FORTUNE COOKIES SINGLE WRAP		5.99		SHANG PIN	CS		350 COUNT
1		7607533			NOODLE LO MEIN RAW		22.99		GOLDEN BOWL	CS		6/5# CASE
1		7726946	1	EA	COLORING FOOD EGG SHADE YELLOW		3.60	3.60	KARIOUT	CS	EA	12/10T
1		7829047	1	CS	PASTRY 'O' LONG PUFF		7.63	7.63	KINGPAS	CS		42CT
1		8115380			PASTRY 'NP' NAPOLEAN MINI		7.99		KINGPAS	CS		40 CT
1		0507430			CHICKEN LEG MEAT BNLS		0.78		NEWSBL	CS		4-10#
1		1992270			CHICKEN BREAST B/IN		1.01		PILGRIMS	CS		40# CW CAS
1		0748862			TOWEL ROLL BROWN NON-PERE KRAFT		22.21		NOVEY PACKE	CS		17/60NET

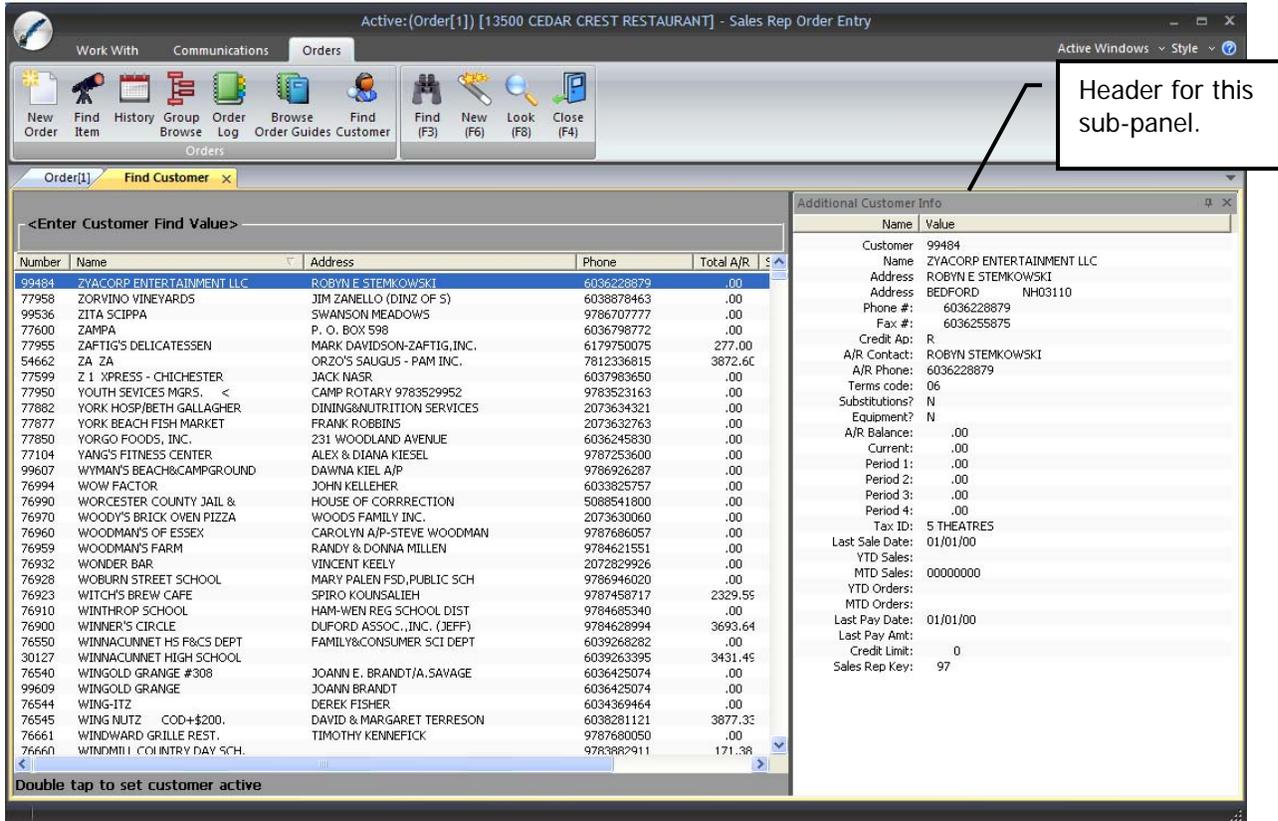
Move your mouse over the yellow rectangle to display the information in the side panel.



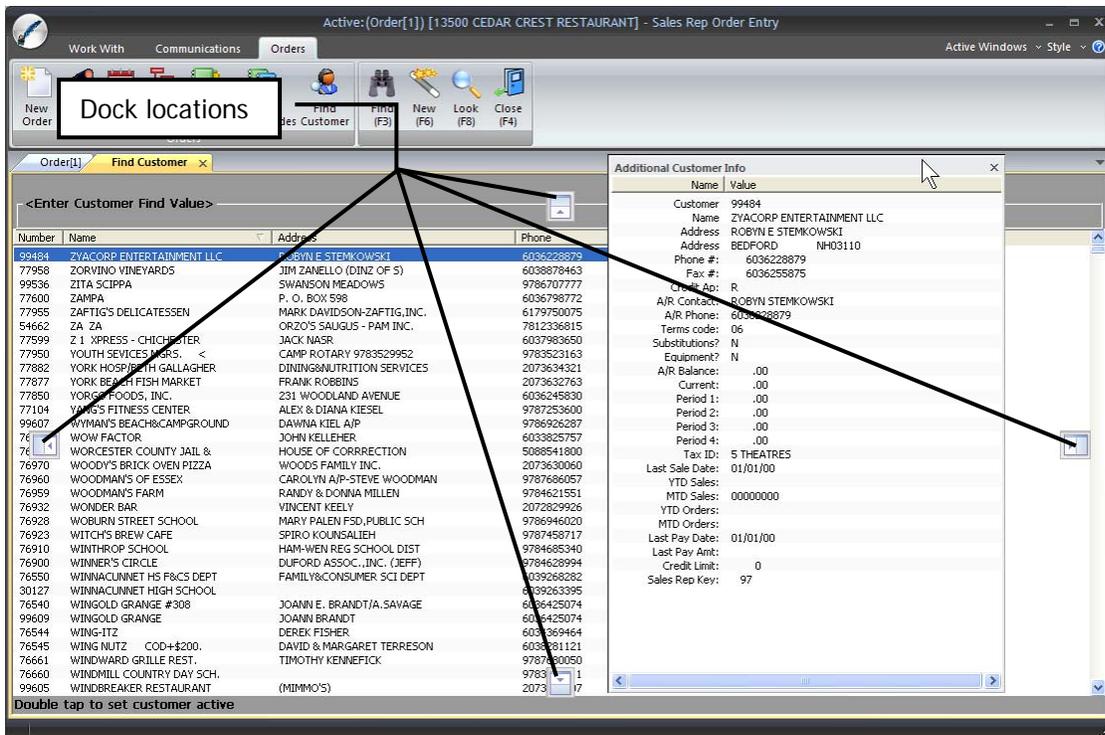
## Moving and Docking Panels

Some sub-panels, like Additional Customer Information, can be moved around the screen.

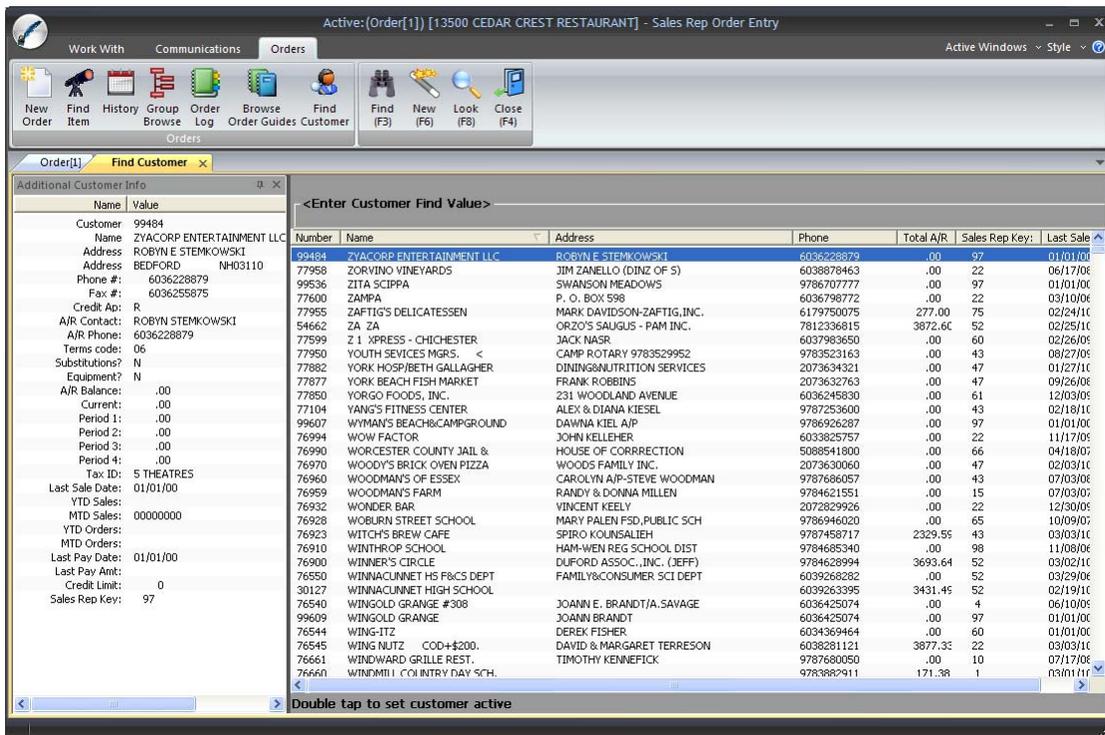
Here the panel is shown docked at the right.



If you click-and-hold on the sub-panel's header, you can drag the panel into other locations or leave it floating on top of the panel. As you move the panel, the possible dock locations are shown.



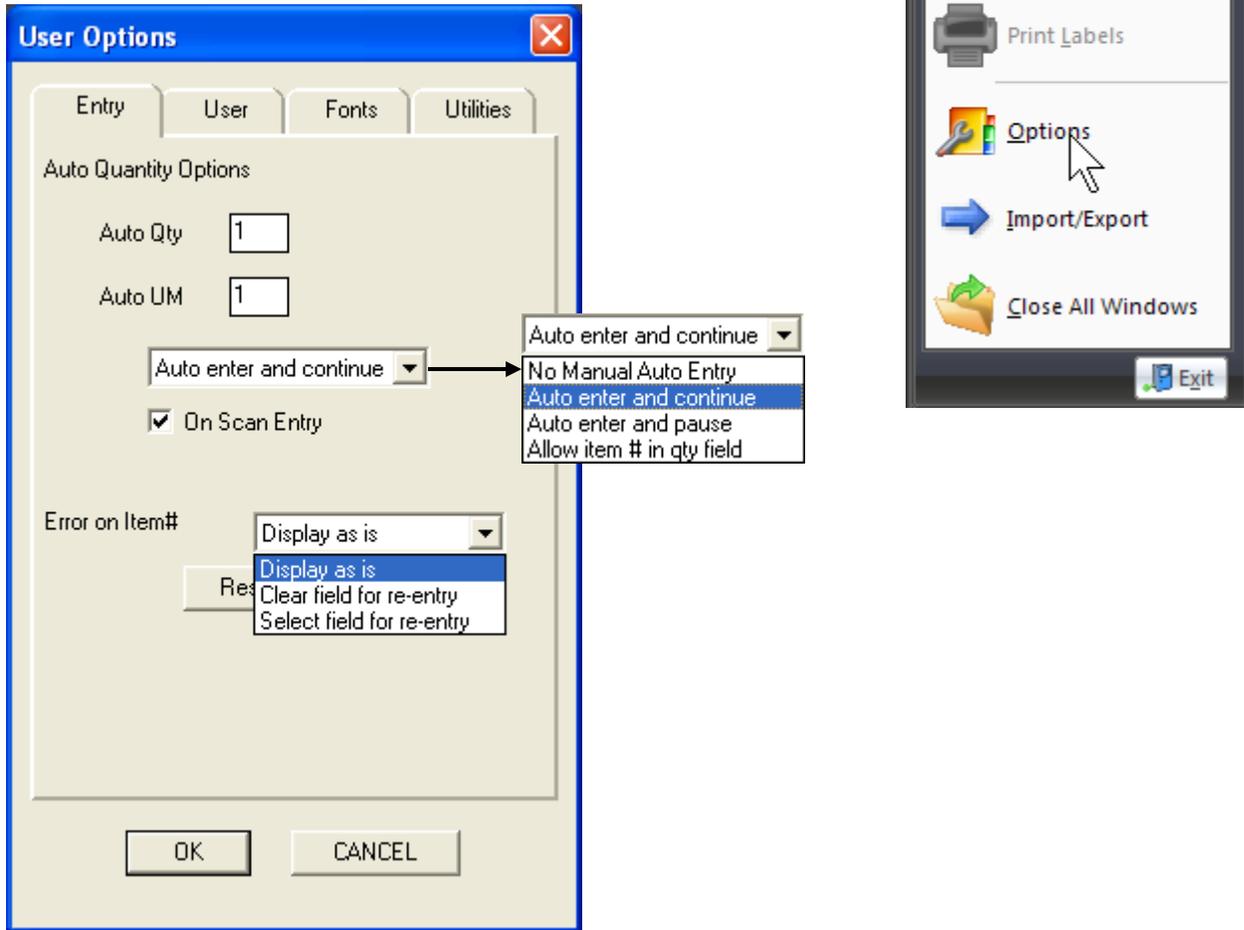
When you move the sub-panel over one of the dock locations, you dock it there.



# User Options

There are several user-settable options that control how POET® operates. To access the options, open the **POET® Application Menu** and click on **Options**.

This will display the user options.



## Entry Options

**Auto Qty** This manual describes how adding an item by typing an item number or scanning an item's bar code adds the item to the order with a quantity of 1. This is why that happens. You can change the Auto Qty up or down on the fly to control how the automatic quantity. Some users require multiple cases for some products. You can come here, change the Auto Qty to 3, or whatever quantity is required, and automatically sell three.

You can always change the quantity once the item has been added.

**Auto UM** 1 is a full case. If you sell partial cases using the same item number, 2 is a partial case.

Auto Enter	This dropdown controls the behavior of item numbers when scanned.	
	No Manual Order Entry	Scanned number goes into the item number field. You must press <b>[Enter]</b> to add the item to the order, set a quantity, and press <b>[Enter]</b> to go to the next line.
	Auto enter and continue	Adds the item to the order, enters the Auto Qty, and goes to the next line.
	Auto enter and pause	Adds the item to the order, but waits for you to enter a quantity and press <b>[Enter]</b> .
	Allow item # in qty field	Allows you to scan a number as a quantity. This can be dangerous if not set up properly. If you have an item number 663560, you could conceivably set a quantity to 663,560.
Error on Item#	Controls the behavior of the item number field if you enter an invalid number.	
	Display as is	Display the item number entered. Requires you to select and delete the item number before continuing.
	Clear field for re-entry	Deletes the wrong item number. If you work quickly, this means you can't tell what you entered incorrectly.
	Select field for re-entry	Highlights the item number. You can see it and check it, but as soon as you start typing a different number, the wrong one disappears.
Reset Defaults	Restores the default settings.	

## User Settings

The two settings you may want to look at are **Ask for Line Delete** and **Ask for Header Delete**.

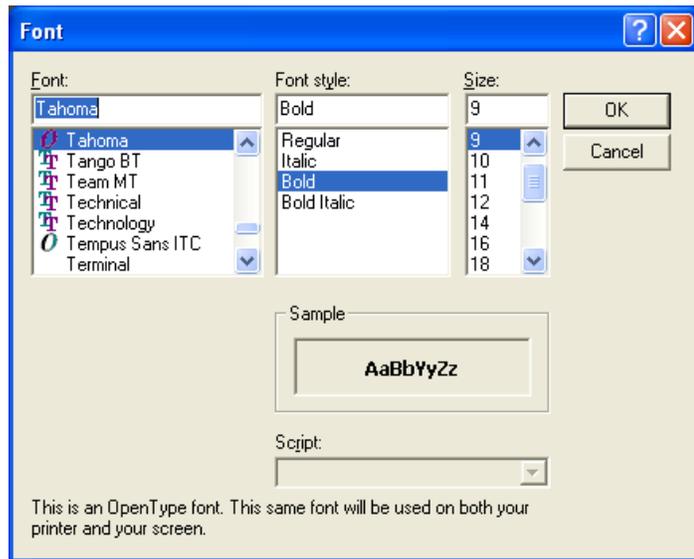
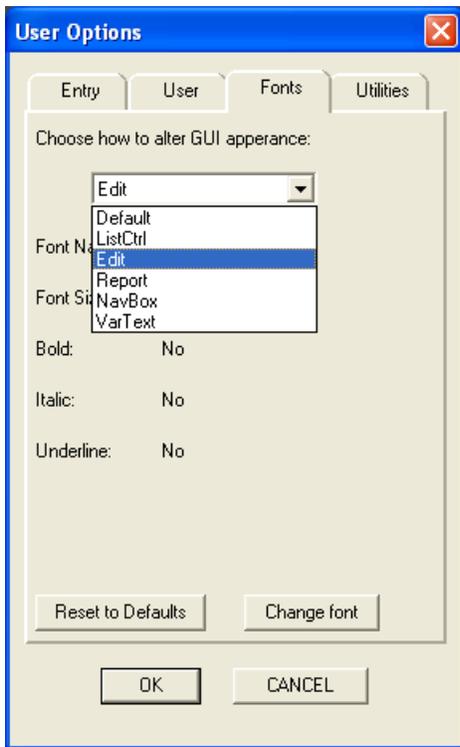
Ask for Line Delete	Prompts you to confirm when deleting items from an order or order guide.
Ask for Header Delete	Prompts you to confirm when deleting orders in the Order Log.

## Fonts Settings

There are five groups of fonts. The text used in these fonts can be adjusted in this area.

List Ctrl	Controls the fonts in lists like the drop down available to set a delivery day.
Edit	Controls the fonts in the entry field.
Report	Controls the fonts in reports and print backs.
NavBox	Controls the fonts in the drop-down box, such as those used in the Order Header.
VarText	Controls the fonts in the order summary

Select the font, click the **[Change font]** button, and change the font size (larger number is a larger font) weight, and style.

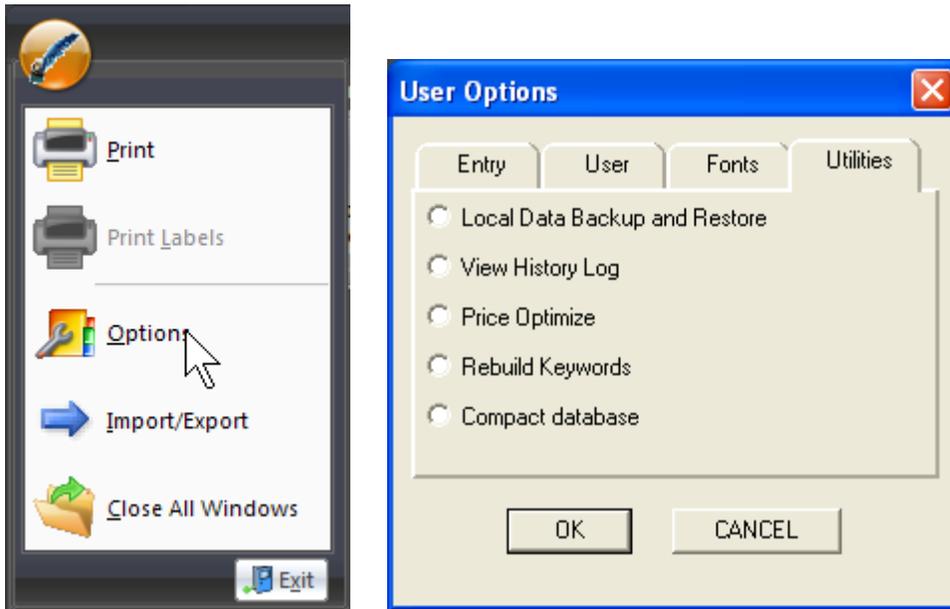


## Utilities

There are times when you may want to delete or reorganize certain files to help POET® work more effectively. POET® has options that allow you to:

- Backup or Restore local data
- View the history log
- Optimize prices
- Rebuild keywords
- Compact the database

Access the Utilities by clicking on the Control Menu and selecting **Options**. Then click on the **Utilities** tab.



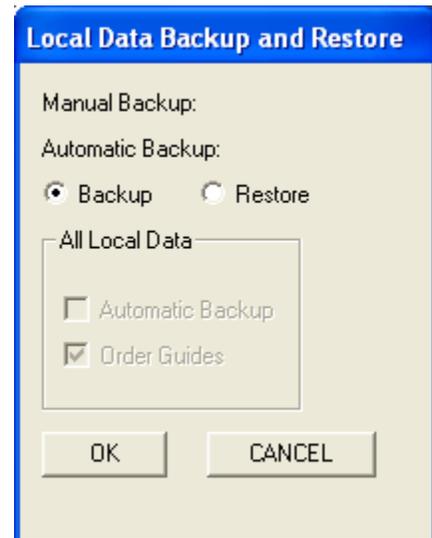
## Backing up and restoring local data

When you create a Special Order Guide on your computer, that is not something that comes from the Host. If you lose your computer, or if it is damaged, you've lost those order guides.

You can prevent this by backing up your local data to a flash drive.

### To backup or restore local data:

1. Open the Utilities window and select the option for **Local Data Back and Restore**. Click **[OK]**.
2. Select whether to backup or restore. To backup means to save the data somewhere else. To restore means to pull the saved data back if your data is damaged.
3. Click **[OK]**.
4. A status window will display. Allow processing to complete.



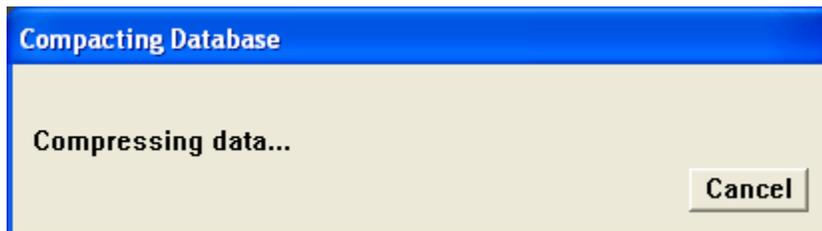
## Compact the database

As data such as old prices and discontinued products becomes obsolete, it is automatically deleted. However, in a database, a deleted item is not really gone, it is just marked so that it will be ignored and not displayed. It is not completely removed until you compact your databases. You will want to compact the databases on a monthly basis to allow your laptop to work at peak performance.

Note: This clean-up process may take about one-half (1/2) hour so be sure to allow adequate time for the process. Make sure that your laptop is plugged in to the AC outlet so that you do not run out of power during the process.

### To compact the databases:

1. Open the Utilities window and select the option to **Compact databases**. Click **[OK]**.
2. A status window will display. Allow processing to complete.



## Rebuild Keywords

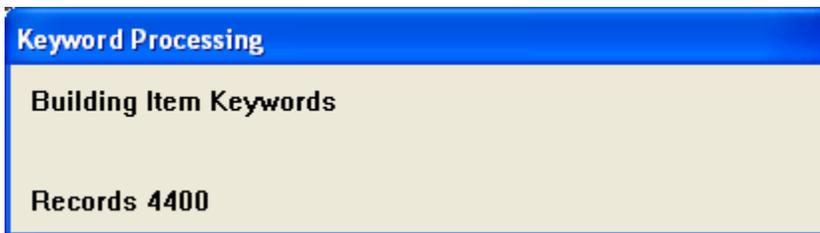
Imagine a library where each day new books arrive. The librarian places them on the shelf in order of arrival, next to yesterday's books. If today's books included a history, a western, a cook book, and a biography; they would be placed next to yesterday's mystery, children's story, horror novel, and book of sports training advice. How would you ever find anything?

This is exactly how new information is added to your computer each day. To help you find things, the databases are indexed. The index tells POET® that to display the customers by customer name, show record 31, 2, 912, 3096, 64, 11, and 321.

If the indexes become corrupted, you cannot find your data, or it displays incorrectly. When that happens, you can perform a database rebuild, which will read all of your databases and create new indexes for them.

### To rebuild keywords:

1. Open the Utilities window and select the option to **Rebuild Keywords**. Click **[OK]**.
2. A status window will display. Allow processing to complete.



This process generally takes from five to ten minutes, however some users, who have inordinate amounts of data, may take up to an hour.

It is recommended that you backup your local data after you create a new order guide, or at least weekly. Also, back it up twice on two thumb drives, and keep one at home and one with the laptop. If something happens to your laptop, the host can replace everything but your local data. If your hardware is stolen, you will have the local data safe at home.

# Laptop Care and Maintenance

Your laptop is constructed sensitive electronic equipment. It is fragile, and is sensitive to impact, temperature, water, and electrical static. Additionally, the screen is similar to a fabric, and can tear if pressed or punctured.

Following these rules will help prevent damage to your computer.

- Never 'wash' the laptop. Wipe your laptop off with a moistened cloth.
- Never use a pointed object near the screen, nothing sharper than your finger.
- Vacuum the keyboard; don't 'blow' the dust out. Blowing forces the dust inside.
- Don't drop the laptop. Your laptop will not survive a three-foot drop, and maybe not a two-foot drop. Circuit boards, screens, and keyboards can and do break.
- Don't freeze or bake your laptop. Leaving your laptop in the car overnight is bad. (As foodservice reps, be aware of special hazards in your work environment, like steam tables and freezers.)
- If your laptop has been exposed to extreme temperatures, allow it to adjust to the current temperature before turning it on.
- Don't spill liquids or solids into the keyboard.
- Don't allow someone else to use your laptop. This is now part of your livelihood. If they damage your laptop, you may not be able to do your job.
- Inspect your power cord often and keep it in good condition. A cracked power cord can cause a fire or shock a person.
- Keep the laptop in its case when not in use. This will protect your laptop from damage. You will bump things with your laptop; this lessens the impact.
- When you put your laptop in your case, put it with the hinge down. This puts the heaviest part of the laptop on the bottom.
- Put your laptop into the case hinge side down. This puts the battery, the heaviest part of the laptop, at the bottom, and puts less stress on the screen when you set the bag down on its bottom.
- Do not attempt to repair your laptop. If your laptop requires repair, contact your administrator.
- Never run with scissors. Just checking to see if you are awake.
- As a general rule, if you are comfortable, the laptop is comfortable.

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