WEB CONSOLE

Introduction

Web Console is a product that is offered by Standard Distributing Co. that will allow their customers to perform various functions over the internet. Some of these functions include entering orders, viewing their current account statement, viewing past invoices, checking current prices, setting retail prices and running reports.

Note: Words in **bold** will designate words or tabs that will be located on the website. The following is a link to a website that contains some videos on how to perform some of the functions of Web Console: http://support.cdrsoftware.com/webconsole/videos.htm.

Accessing Web Console

Web Console is accessed from the Standard Distributing Co. website www.standarddistributing.com. Once at the website, click on the **Customer Login** button at the top right of the page. A new window will appear with a place to enter an account number and password. Enter your account (customer) number and password that has been assigned to your account. Use the drop-down arrow to select **Store** or **Corporate**, depending on the type of account that you are working with, and click on the **Logon** button. Note: Your password may be changed by calling Standard Distributing Co. at (918) 224-7777 and requesting that it be changed.

Overview of Web Console

When Web Console is accessed the account name is displayed at the top of the page next to **Logged on as:** with **Log Out** and **Help** to the right of the account name. You should always click on the **Log Out** link to exit the application. The **Help** link will provide different help screens depending on the page that is currently active.

When the cursor (pointer) is positioned over any of the six menu tabs (**Home, Products**, **Orders**, **Account**, **Retail**, and **Reports)** dropdown boxes will automatically appear.

- The **Home** tab is used to return to the alerts page or go to the News page.

  The **News** page will display our Extended Products catalogs of Groceries, Meat, Produce, Deli, and Bakery items. These items can only be ordered by the case and you must sign up for this program offering. See your sales rep. for more information.
- The **Products** tab is used to view items by category or sub-category, override retail prices, select items to be ordered from the catalog, or to view promotions.
- The **Orders** tab is used to view current or past orders, create orders, or view pre-book orders.
- The **Account** tab is used to view past statements or view a log of Web Console activity.
- The **Retail** tab is used to set the retail prices that will print on invoices or shelf tags.

    - The **Reports** tab is used to create Future Price Changes, Sales Analysis, and Velocity reports.
- Note: When cost is displayed, any off-invoice allowances will not be included in the cost figure. (ex. Marlboro $2.10/carton) Consideration should also be made when setting a retail price using cost plus a percent.

<u>Working with Orders</u>

In Web Console, orders are either Current orders or History orders. Orders are called Current until they are shipped and invoiced. After that they are called History orders. At any time you can position over the **Orders** tab then click on the **Current** tab to get a list of open orders. An order that has Entry in the Type column and Cart in the Status column is considered to be the active or Cart order. If an item is added to an order it will always be added to the Cart order. If you want to add items to a different Entry type order, click on that order number and click on the **<u>Set to Cart</u>** link after the order appears. This will cause the order to be the Cart order. When displaying with an active order, there are four links located under the **Order Total:** field that may be selected.

- If the **<u>Delete</u>** link is clicked, the order will be deleted.
- Once all desired items have been added to the order the **<u>Confirm</u>** link must be clicked to cause the order to be pulled and shipped.
- **<u>Save As New Template</u>** may be clicked to create a template order that may be used as a basis for future orders. The use of template orders will be discussed later.
- The **<u>Save As New Label Batch</u>** link is used to create a batch of items that will be used to print shelf labels.

There are several ways to create an order using Web Console, but once an order has been created and reviewed, you must click on the **Confirm** link to cause the order to be printed and shipped. If you use either of the **Catalog** or **Rapid** methods of entering items, an order will be created for you without creating a blank order first. If you click on the **Orders** tab then click on the **Create** tab three options will be provided:

- **Create an empty order**
- **Create an order using a template**
- **Create an order based on your average order history**

A. **Create an empty order** - If **Create an empty order** is selected an empty order will be created and a description may be added to the order. Items must be added to the empty order by using the **Catalog** method or by using the **Rapid** method of entering items.

    1. **Catalog method** - To add items using the **Catalog** method, position over the **Products** tab and click on the **Catalog** tab below it then click on the **Order** tab. To enable you to more easily locate the desired items to be included in an order, there are several ways to limit the items that appear on the screen.

a) Search for items - If you want to search for items by item description the view on the screen must be **ALL PRODUCTS**.
Note: while displaying **ALL PRODUCTS** you may need to click on the **Forward** button at the bottom of the screen to advance to the next group of items.

If all products are not displayed, click on the **ALL PRODUCTS** link located on the left side of the page and a search box will appear. Keying a partial product description in the search box and clicking on the circle to the right of **Position** and clicking on the **Go** button will position the list of items to the first item that begins with what was keyed (ex. Key *sn* for snicker and the list begins with SNAP-E-TOM COCKTAIL). If you key a word in the search box and click the circle to the right of **Contains** then click the **Go** button the list will contain items that have the word somewhere in the description. If you key a twelve digit UPC code then click on the circle to the right of **UPC/Vendor Code** then click on the **Go** button the list will contain only items that have an exact UPC match.

b) You can also limit the items that appear in the list by clicking on the **RECENTLY ORDERED PRODUCTS** link located below the **ALL PRODUCTS** link. This will limit the list to items that have been purchased in the last month. The last purchased date appears in the list.

c) The **NEW PRODUCTS** link causes only new items to appear in the list.

d) Product categories are listed below the **NEW PRODUCTS** link. If you click on the plus sign (+) to the left of any category a list of sub-categories will appear. Clicking on a sub-category will cause all items in the sub-category to appear in the list.

After using any of the methods mentioned above to locate an item, key the desired order quantity in the quantity field and click on the Order button at the bottom right of the screen. This will add the item to the order.

2. **Rapid method** - The Rapid entry method is especially useful if the item number is already known. To use it, position over the **Orders** tab then click on the **Rapid** tab. Key an item number in the box in the **Product Code** column and the order quantity in the box in the **Quantity** column. If the item number is not known you may search for it by clicking on the [...] link (to the left of the **Product Code** box). This will open a **Select Product** screen that will allow you to use the **Position To** function to search for an item by description. Clicking on the desired item description will return the item number back to the **Rapid** entry screen. Once the items and quantities have been entered, click on the **Validate** button at the top or the bottom of the screen. This will verify that all of the item numbers keyed are valid item numbers and the item description will appear to the right of the quantity. A message will appear beside any invalid item number. The item number may be corrected and validated again. When no error messages are displayed, click on the **Order** button. The items will be placed on the active (**Cart**) order or a new order will be created at this time. To continue

using the Rapid entry method, position over the **Orders** tab then click on the **Rapid** tab and key the item number and quantity as before. Click on the **Validate** button and correct any errors. Click on the **Order** button to add the items to the active (**Cart**) order. When the order is complete click on the **Confirm** link to cause the order to be printed and shipped.

B. **Create an order using a template** - If **Create an order using a template** was selected from the **Create** tab you will be asked to select an order template from the dropdown box by clicking on the down arrow and clicking on the desired template. If a template order has not been created, see how to create a template order below. Key the order description, if desired, and Click the **Continue** button. An order has been created using the items and quantities from the template order. You can remove any items from the order by clicking on the box in the **Remove** column to the left of the item to be removed and clicking on the **Apply Changes** button. You can also change the quantity of any of the items in the order by clicking on the box in the **New Qty.** column for that item and keying the new quantity. When all changes have been made click on the **Apply Changes** button. Items may be added to the order using the **Catalog** or **Rapid** entry methods described above.

- **Create a new Order Template** – A new **Order Template** can be created from any existing order or by creating a new order then creating the template from the new order. Once a template has been created it can be updated like any other order. To create a new template, you can create an order using one of the methods above and before confirming the order, click on the **Save As New Template** link. Or you can use an existing order by positioning over the **Orders** tab then clicking on the **Current** or **History** tab, locate the desired order and clicking on the order number. When the order is displayed, click on the **Save As New Template** link. When prompted, key a description for the template then click on the **Click to create your template** button. Click on the new template order number and click on the **Set to Cart** tab before adding any new items to the template. The quantities can be changed as in any other order then click the **Apply Changes** button. You can create a many templates as desired.

C. **Create an order based on your average order history -** If **Create an order based on your average order history** was selected from the **Create** tab you will be prompted to enter the number of days of order history that you want included in the average order calculations. Enter the desired number of days and a description for the order and click on the **Continue>>** button. An order will be created that consists of items that have been purchased in the number of days entered with the quantity based on the average of the purchases. Item quantities may be changed and items added or removed using the methods mentioned above.

To view orders that have been shipped and invoiced position over the **Orders** tab then click on the **History** tab. A list of past orders will be displayed in descending date sequence. To display an order in “order entry” format, click on the desired order number. To display an order in “invoice” format, click on the **View Invoice** link to the right of the desired order number. To print the invoice, right-click on the viewed invoice then click on print.

Working with Retail Prices

Retail prices are normally calculated using the cost of an item and adding a percentage or dollar amount of profit. Retail price policies can be as simple or complex as desired. The retail price policy can be created based on the category, or sub-category within the category, or the alternate sub-category that is associated with an item. An item can also be priced without using the retail policy by using a **Retail Policy Override**. While it is very easy to change retail prices using Web Console, please remember that you must re-price product on the shelf and update any "point of sale" or "back office" software before the new retail prices have any effect.

There is very good help information written about setting retail prices that is recommended reading before updating retail prices. To locate the help information, position to the **Retail** tab, then click on the **Policies** tab. Click on the **Help** link at the top of the page. When the **Retail Policies** help screen appears click on the **Retail Policies Overview** link and read the information provided.

Use the following example as a guide for setting up a new retail policy. Let's say you want to make a profit of thirty-five percent (35%) on all snack items that you sell. You also want to sell meat snacks (a sub-category within the snacks category) for forty percent (40%) profit, except for Slim Jim Steak Strips that will sell for $2.05. You also want to make $5.00 profit on the two gallon and five gallon gasoline cans.

A. **Category Retail Policies** – Category Retail policies are the broadest of the retail policies. A sub-category retail policy will override a category retail policy. To create a category retail policy, click on the **Retail** tab and under the **Retail Policies** tab click on the down arrow to view the drop-down box. Click on **Category Retail policies** and any existing category retail policies will appear in a list. To create a new one, click on the **[Add New Retail Policy…]** link and a **Select Policy** window will appear. You may need to click on the **Forward>>** button to view additional categories. In this example, locate the desired category (**Snacks**) and click on it. After the **Add New Retail Policy** window appears click on the down arrow in row 1 under the **Type** heading then click on **Cost+%**. This will add a percentage to the cost of all snack items. Under the **% or $** heading, key *35* for thirty five percent. Click on the down arrow in row 1 under the **Profit/Markup** heading and click on **Profit**. Key *5* under **Rnd X** to round the price up to end in five (5) if the calculated price ends in zero to five and key *9* under **Rnd Y** to round the price up to end in nine (9) if the calculated price ends in six to nine. If you wanted all prices to end in nine then key 9 under **RND X** and leave **RND Y** blank. Click on the box below the **Sell** heading to indicate that you sell this unit of measure and click on the circles below **Prim** and **Inv** to indicate that this is your primary selling unit of measure and this is the unit of measure that will be printed on the invoice. Click on the **Add** button at the bottom of this window. This will set the retail price of all snack items to cost plus thirty-five percent profit and the price will be rounded up to the nearest 5 or 9.

B. **Sub-Category Retail Policies** - A sub-category retail policy will override a category retail policy but can be overridden by an alt-sub-category retail policy. The alt-sub-category retail policy is created the same way as the category or sub-category retail policies so it is not included in this example.

Next we need to set meat snacks to forty percent profit. Click on the down arrow under the **Retail Policies** tab and click on **Sub-Category Retail Policies**. If one does not exist for meat snacks, click on the **[Add New Retail Policy…]** link and the **Select Sub-Category** window will appear. Key *meat* in the **Position To:** box and click on the **Go** button. This will position the list of sub-categories to **MEAT SNACKS** then click on it. In the **Add New Retail Policy** window click on the down arrow in row 1 under the **Type** heading and click on **Cost+%**. Under the **% or $** heading key *40* for forty percent. Click on the down arrow in row 1 under **Profit/Markup** and click on **Profit**. Key *5* under **Rnd X** and key *9* under **Rnd Y** and click on the **Add** button at the bottom of this window. This will set the retail prices of all meat snack items to cost plus forty percent. If you sold meat snacks by the box as well as individual items, you could repeat this process for the second row to set the retail for a box of meat snacks.

C. **Retail Policy Override** – The retail policy override is the most specific of the retail policies and will override the retail price of an item ignoring any other retail policy.

1. In our example we want to sell Slim Jim Steak Strips for $2.05. Since this is a fixed amount, even if the cost of this item changes, the retail price will remain $2.05 until it is changed using one of the following methods. You could repeat the above process by clicking on the down arrow under the **Retail Policies** tab and clicking on **Product Retail Policies.** If one does not exist for this item, click on the **[Add New Retail Policy…]** link and the **Select Product** window will appear. Key *slim* in the search box and click the **Go** button. Locate **SLIM JIM BEEF STEAK STRIP – 432822** and click on it. This time select **Fixed $** under the **Type** heading and key *2.05* under the **% or $** heading then click the **Add** button.

2. Another way of doing this is to click on the Products tab and verify that **All Products** are displayed, if not click on the **All Products** link. The **Retail Policy Overrides** tab should also be active. Key *slim* in the search box and verify that **Position** is selected then click on the **Go** button. Locate the **Slim Jim Beef Steak Strip – 432822** item and click on the **pad and pencil symbol** to the right of the item. This will display the same type of window as before. Select **Fixed $** under the **Type** heading, key 2.05 under the **% or $** heading and click the **Apply** button at the bottom of the screen. This method is handy if you are reviewing items in the **Catalog** tag and need to set the retail price for an item.

3. To make $5.00 profit on the gasoline cans, click on the **All Products** and **Retail Policy Overrides** tabs as before and key *gas* in the search box. This time click on the circle to the right of **Contains** then click on the **Go** button. This will include only the items that have the letters gas in the description. Click on the **pad and pencil symbol** to the right of both the **GASOLINE CAN 2 GAL., plastic** item and the **GASOLINE CAN 5 GAL., PLASTIC** item. This will open the window on both items. This time select **Cost+$** under the **Type** heading and key *5.00* under the **% or $** heading. Key *5* under **Rnd X** and key *9* under **Rnd Y**. If you click on the Set All link, all items with open windows will be updated to have the same retail policy overrides. Clicking on the square below the **DEL** heading will delete the retail policy override for the item.