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Getting Started

Accounts and Contacts

Accounts are the "master" memberships for all EC participants. Every Retailer and Manufacturer has one account. In some cases, a large Retailer may have multiple accounts (e.g., Safeway may have two separate accounts, labeled "Safeway/West Coast" and "Safeway/East Coast", each with its own corporate and billing information).

Contacts are the individual people associated with an account. There are several types of Contacts:

o Billing Contact: the person/department who receives invoices from EC o Buyer Contact: the person(s) who make purchases through EC o Non-buyer Contact: additional person(s) who need to have access to the system but do not make purchases

Every account must have at least two Contacts: a billing Contact and a buyer.

Locations are the ship-to addresses associated with an account. Every account must have at least one location.

Qualifying Retailers and Manufacturers for Membership

EC selects members based on the following criteria:

Manufacturers:

o Must be NASFT members o Must provide samples of their product(s) to EC in order to assess quality of product and packaging

Retailers:

o Must belong one of the following categories: Gourmet Retailer, Upscale Grocery, Specialty Store, Mail-Order Catalog, Department Store

Accounts

Creating a new account

Retailer:

1. On the "My Accounts" page select the "Add New Retailer" link.

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Edge Wood Creek	WIN ACCOUNTS EDIT PACENS / ACCOUNTS CATALOG HELP FLOGOUT
ADMINISTRATIVE TOOL	My Accounts
Accounts	
	My.Ratallars
	My Manufactures
Add to Accounts	
	Add New Retailer
	Add New Manufacturer
Edit Functions	a contra c
	Edit Order
	Edit Accounts/Contacts
Edgewood Creek System	
	EC Contacta
	System Tools
ARCH CATALOG	

2. On the "Create New Retailer Account" page, enter the following information:

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Edge wood Creek	HIN ACCOUNTS WEST ONDERS / ACCOUNTS BOATALOG BHELP, BLOGOUT
ADMINISTRATIVE TOOL	My Accounts : Create Retailer Account
Create Retailer Account	
Corporate Information	
Account ID Number	0
Company Name	
Street Address 1	
Street Address 2	
City	
State	Please Select
Zip Code	
	J
Phone Number	
Fax Number	
Email	
URL	
Company Type	Please Select
if other	
alling Information	
Billing Contact ID Number	
Billing Contact First Name	
Billing Contact Last Name	
Billing Contact Title	· · · · · · · · · · · · · · · · · · ·
Billing Address 1	
Billing Address 2	P
Billing City	
Billing State	Please Select
Billing Zip Code	
changedy cover	
Billing Contact Phone Number	
Billing Contact Fax Number	
Billing Contact Email	
Credit Limit	0
Credit Terms	Please Select
Idditional Company Information	
"Off Invoice" Discount (%)	
Resale Number	
Retailer Class	Please Select
5dgewood Creek Representative	Information
EC Acct. Rep.	Ed Wolf
	Courses Courses
ICH CATALOG	
OUCT/BRAND HANUFACTURER	KEY INGREDIENT ITEN NUMBER

Corporate Information

- Account ID Number (a unique 5-digit number assigned sequentially, i.e., 00001 -99999. Account managers are responsible for assigning these numbers.)
- Company Name
- Street Address (2 lines), City, State, Zip
- Phone (main number), Fax (main number), Email (general information address, e.g., <u>info@retailer.com</u>), URL (e.g., <u>www.retailer.com</u>)
- Company Type (High Volume, Medium Volume, Low Volume, or Other)

Billing Information

- Billing Contact ID Number (the Account ID Number with a sequential 2-digit appendix, e.g., 00001-01)
- Billing Contact Name (person's name)
- Billing Contact Title
- Billing Address (where invoices are sent may be different from the Street Address under Corporate Information), City, State, Zip
- Phone (that person's direct number), Fax (main number), Email (general information address, e.g., <u>info@retailer.com</u>), URL (e.g., <u>www.retailer.com</u>)
- Credit Limits
- Credit Terms

3. When you have filled in all the relevant information, continue to the confirmation page. If all the information shown is correct, "Okay" the screen to enter the information into the Edgewood Creek system.

Manufacturer:

1. On the "My Accounts" page select the "Add New Manufacturer" link.

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Edge wood creek	WIN ACCOUNTS SEDIT CACENES / ACCOUNTS SCATALOG SHELP SLOBOUT
ADMINISTRATIVE TOOL	My Accounts
Accounts	
	My Retailers
	My Manufactures
Add to Accounts	
	Add New Retailer
	Add New Manufacturer
Edit Functions	
	Edit Order
	Edit Accounts/Contacts
Edgewood Creek System	
	EC Contacts
	System Tools
ARCH CATALOG	
	I REFERENCE IN THE REFERENCE

2. On the "Create New Manufacturer Account" page, enter the following information:

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Edge wood Creek	HY ACCOUNTS WENT ORDERS / ROCOUNTS & CATALOG & HELP & LOGOUT
DMINISTRATIVE TOO	My Accounts : Create Manufacturer Account
reate Manufacturer Accou	nt
orporate information	
Account ID Number	0
Company Name	
Street Address 1	
Street Address 2	
City	
State	Flease Select *
Zip Code	
Phone Number	
Fax Number	
Email	
URL	
Company Type	Please Select
if other	
syment information	
Payment Method	Please Select
Bank Account #	
Bank Routing #	
dditional Company Informa	eon .
Memberships	
Manufacturer Class	Please Select 💌
UPS Ant#	
dgewood Creek Represent	tati ve Information
EC Acct. Rep.	Ed Wolf
	CANACEL CONTRACE D
CH CATALOG	NER KEY INGREDHENT ITEN NUMBER

Corporate Information

- Account ID Number (a unique 5-digit number assigned sequentially, i.e., 00001 -99999. Account managers are responsible for assigning these numbers.)
- Company Name
- Street Address (2 lines), City, State, Zip
- Phone (main number), Fax (main number), Email (general information address, e.g., <u>info@retailer.com</u>), URL (e.g., <u>www.retailer.com</u>)
- Company Type (High Volume, Medium Volume, Low Volume, or Other)

Payment Information

- Payment Method (Check or EFT). All Payments will initially be by check, so you need to inform Manufacturers of that fact
- Bank Account Number
- Bank Routing Number

Additional Company Information

- Membership (these would be for professional organizations and trade groups like the CCA, NASFT, etc.)
- Manufacturer Class (currently the state where the manufacturer is located)
- UPS Account Number
- 3. When you have filled in all the relevant information, continue to the confirmation page. If all the information shown is correct, "Okay" the screen to enter the information into the Edgewood Creek system.

Editing an existing account

There are two ways to edit an existing account:

1. When editing your own accounts (which appear on the "My Retailers" page) just click on the hyperlinked Account Name. At the bottom of the Account Detail page, click the "Edit Account" button.

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. → . G	p Refeesh Home Search Favorites History Mail
Edge Wood Creek	WHY RECOURTS \$ EDIT OF DERIS / RECOURTS \$ ORTALOG \$ HELP \$ LOGOUT
ADMINISTRATIVE TOOL	My Accounts : My Manufacturers : Account Information
/endor: Cale Tequita (View C	ument POsj [View Products] [View Contacts]
fanufacturer Account	
Corporate Information	
Account Number	4
Company Name	Cafe Tequila
Street Address 1	55 Test Dr.
Street Address 2	
City	Santa Barbara
State	CA
Zip Code	93117
Phone Number	510 225-6223
FaxNumber	415-555-5555
Email	test@cafetequilatest.com
URL	www.cafetequila.com
Company Type	Medium Volume
ayment information	
Payment Method	e5
Bank Account#	00000
Bank Routing #	99999
idditional Company Informatio	30
Memberships	Spicy Test Foods
Mnaufacturer Class	CA
UPS Acct#	00000000
idgewood Creek Representat	ive Information
EC Acct. Rep. Name	Olen Danzig
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ACH CATALOG	
	KEY INGREDIENT ITTEL MARBER
1	Internet

2. When editing accounts other than your own (which do not appear on the "My Retailers" page), use the "Edit Orders / Accounts" global navigation selection to go to the Edit Orders / Accounts page. Enter the Account ID number in the appropriate box and press the "Edit" button.

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Edge	FINY ACCOUNTS W COIT	OFDERE / ACCOUNTS	NTALOG FHELP FLOO	JOUT
ADMINISTRATIVE TOOL	My Accounts : Edit Orde	rs / Accounts		
Edit Existing Order				
Order Number		C 1933		
My Retailers				
Accounts				
Retailer Account ID Number		1017.0		
Contacts				
Retailer Contact ID Number		10110		
My Manufacturers				
Accounts				
Manufacturer Account ID Number		(COT)		
Contacts				
Mahufacturer Contact ID Number		(CT)		

When you get to the "Edit Account" page, input the updated information and click the "Continue" button. If the information on the confirmation page is correct, click "Okay", if not, click the "Edit Account" button to go back and correct the information.

Deleting an account

There is currently no user-initiated method to delete an account from inside the Edgewood Creek system. Please speak with the DBA if you need an account removed.

Ship-to Addresses:

Creating a new ship-to address

Ship-to Addresses are accessible from the Account Details page. Click on "View Locations" in the secondary navigation bar. This will bring up a summary list of all the Ship-to Addresses for that retailer. To create a new Ship-to Address, Click the "Add New Location" link at the bottom of the summary list.

ADMINISTRATIVE TOOL	My Accounts : My Retailers : Account Information
Retailer: Funky Fun Tarts [View	Statements] [View Locations] [View Contacts]
Retailer Account	
Corporate Information	

Location Information

- Location name: This is a name or nickname assigned for any location
- Street Address 1 and 2
- City
- State
- Zip Code

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Edge .	HY ACCOUNTS WEDIT OF	DERS / ACCOUNTS	CATALOG \$ H	LP FLOGOUT
Creek ADMINISTRATIVE TOOL	<u>Mv Accounts : Mv Retailer:</u> Ship-To Address	E : Account Information	n : Ship-To Add	r <u>esses</u> : Greate
Creale Ship-To Address				
Ship-To Address				
Location Name				
Street Address 1				
Street Address 2	[
City				
State	Please Select			
Zip Code				
1 · · · ·			CANCEL	CONTRACTO
			(Cardina Cardina Cardi	

When all the information is entered, click "Continue" to view the confirmation screen. If all the information is correct, click "Okay" to submit the data and return to the Location Summary page.

Editing an existing ship-to address

Back Forward Stop	Refresh Home	Search Favorite	: History Mail	
Edge_	WHY RECOUNTS	ONDERS / ACCOUNTS	CATALOG PHELP PLOGOU	π
Creek				
ADMINISTRATIVE TOOL	My Accounts : My Retail	ers : Account Informatio	n : Ship-To Addresses	
Nature's Own - Ship To Addresses				
Ship-To Addresses Location Name			City, State	100
			Laguna, DE	
Bath Lah, Laguna The Doo, Joshua Tree			Jothua Tree, CA	
The Spot, Oakland			Oakland, CA	
The Waiting Load, Long Beach			Long Beach, CA	
ADD NEW LOCATION				

To edit an existing Ship-to Address, select a location from the "Ship-to Address Summary" page. On the Ship-to Address detail page, click the edit button, which will take you to the edit screen. Make any changes necessary and press the "Continue" button. If the information on the Confirmation page is correct, click the "Okay" button to return to the Ship-to Address Summary page.

Deleting a ship-to address

There is currently no user-initiated means to delete a Ship-to Address from within the Edgewood Creek system. Please speak with the DBA if you need an address removed.

Contacts:

Edgewood Creek maintains information about the people that interact with the system in the form of Contacts. There are three classes of Contacts, one for Retailers, one for Manufacturers, and one for Edgewood Creek employees.

Types of Retailer Contacts:

Billing

This is a specialized Contact that is handled as a part of the Retailer's account and is kept separate from all other Contacts. All Billing Contact information must be completely filled in, in order to create the Retailer Account.

Merchandising Account Manager Head Buyer Class Buyer Training Accounting Director

Types of Manufacturer Contacts:

Merchandising Order Fulfillment Accounting Director Owner Product Manager Warehouse Accounting Manager

Creating a new Contact

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Edge wood Creek	HEY ACCOUNTS YEST OFSETS / ACCOUNTS - CATALOG - HELP - FLOSOUT
ADMINISTRATIVE TOOL	My Accounts : My Retailers : Create Relater Contact
Contact Information	
Contact ID Number	
Contact First Name	Fox
Contact Last Name	Mulder
Contact Title	
Street Address 1	123 Easy Street
Street Address 2	
City	New York
State	NY I
Zip Code	01234
Phone Number	212-789-2546
FaxNumber	
Enail	amel@amel.mac
Contact Type	Head Buyer
Preferred Contact Method	phone
Login Name:	tmulder
Initial Password	Imulder
	CANSEL CONTINUE D
RCH CATALOG	KEY INGREDIENT ITON MUNICIP

As with Ship-to Locations, there are several ways to add new Contacts to an account. You can add retailer Contacts from the Retailer Summary (My Retailers) page or from the Contacts Summary page under the Account Information page. On either of those two pages, click the "ADD NEW CONTACT" link. On the "Create Retailer Contact" page, required data includes

- Contact ID Number (the Account ID Number with a sequential 2-digit appendix, e.g., 00001-01)
- Contact Name (person's name)
- Contact Title
- Address (where invoices are sent may be different from the Street Address under Corporate Information), City, State, Zip
- Phone (that person's direct number), Fax (main number), Email (personal address, e.g., bob@retailer.com),
- Contact Type (see list above)
- Preferred Contact Method (the choices are phone or email, but we highly encourage email)

Editing an existing Contact

Back For Ecle	ord Stop	Reliesh	Home	Search	Favorites	History	Hal
Cre	DOCI RATIVE TOOL	My Account	<u>s : My Retail</u>	ers : Accoun	Information	Contacts	
Nature's Own - I	Contacts	5			·		
Contact ID #	Contact Name			Location			
77793112	Fax Mulder			New York,	NY		
	Contact Phone			Contact E	wait		
	212-789-2546			amel@am	el.moo		
ADD NEW CONT	ACT						

In order to edit a Contact, you must select "Edit Contact" from the Contact Summary page. You can view the Contact Summary page for Retailer Contacts from the Retailer Summary (My Retailers) page, from the Contacts Summary page under the Account Information page or by searching for the Contact using the Edit Orders / Accounts page.

Deleting a Contact

If you wish to remove/exclude/prohibit a user from using the system, the only present solution is to change their password, and thereby impede their access.

Changing a Contact's password

To change a Contact's password, go to the Edit Contact Information page and change the Initial Password field to a new password. Confirm the information and "Okay" then change.

Orders:

What is done with Orders?

Orders are recorded by the Edgewood Creek system and are displayed on the Buyers landing page. When an order is received by the Edgewood Creek system, it is split into multiple purchase orders, one for each Manufacturer represented in the order. The Purchase Orders are requests from Edgewood Creek to a Manufacturer to buy certain amounts of the Manufacturers products.

Components of an order:

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ADMIN	ISTRATIVE TO	OL	My Accounts : Cataloo	Contes	tionery : (Minits : Cool I	Bean Mint	s Chocolate Mint
			er (Step 3 of 4) matien is connect: Bill to: softa		Ship to: Randy R			
			d s, AR 34333 EC Acet#34322342			t Lane (GA 92633 #34322342		
	Buyer Na Your PO		Olen Danzip					
	Delivery	Instruction	¢.					
	Order No Only)	te (for EC	Shipping carriest an This information will				1 shipping	L.
0	rder Details							
m	MA MPG		PRODUCT/ BRAND	SIZE	UNIT	PRICE	917	EXTENDED
1	inc.	ns Logue,	Chocolate Mint	Tin	Case	\$84.44	1	\$64,44
2	Hutchi Inc.	ns-Logue,	Cool Bean Mints Chocolate Mint	Tin	Case	\$40.32	3	\$120.98
						ITEM	TOTAL	\$185.40
						DIS	COUNT	(0.0)
							TOTAL	\$194.67
			Shippir	ıg carriet				e of shipping. A your invoice.
10000					G	EDIT ORDER	9	LACE ORDER

Delivery instructions

These are general instructions to all the Manufacturers. They may include the need to write the PO on the box, deliver by 6:00 AM, or call if the order will be shipped partial.

Order notes

This field is for you to make notations about the current order. Any changes, updates, or cancellations should be noted here, as this keeps a running record that is accessible only to Edgewood Creek employees.

Status

The order status reflects where in the completion process an order is. The possible statuses are Open, Partial, Shipped, or Canceled

Placing an order

To create an order, make your way through the catalog and add items using the "Add to Order" button. There are several easy ways of navigating the catalog. The first is browsing by category. Pick the high level category off the catalog entry page and drill down through the sub-categories until you find the product you desire.

The second way of navigating is to browse by Manufacturer name. The Manufacturer information pages contain links to all their products in the catalog. The final way of navigating the catalog is to use the search functionality. If you know the Item Number, search will yield the fastest results. If you know the Product/Brand Name, Manufacturer Name, and the key ingredients, you can use the other search fields.

Edge	top Refresh H	epitr oncens / noc		tory Mail
ADMINISTRATIVE TOOL	My Accounts : S	atalog : Contectione	ry : <u>Mints</u> : Cool Be	an Mints Chocolate Mint
Cool Bean Mints Chocolate Mint	1		s Chocolate Mint r <u>Hytchins Logue, I</u>	
	Cool Bean Mints	3 Cases of 1.0 oz.	Tin (EC-00001_00	2_02) added to your order.
	Chocolate Mint	1.0" x0.0" x3.25"	0001_002-01) \$64.44/Case \$1.70Anit \$0.25/marp	3 QUANTITY
here addictive little coffee be.	to should believe of examine	0.75" x0.0" x2.5"	\$40.32/Case \$0.403unit	3 QUANTITY
ask chocolate are infused with taked in a nifty little tin. A cool	ith real peppermint an	d down wenter cape	\$2.00/m3rp	
anytime you simply must t wor. Iditional Product Information		0.0 oz. Tin (EC-0 0.0 oz. Anit 0.0 *0.0* ×0.0*	0001_00203) \$0.00/case ýlunit \$0.00/marp	3 QUANTITY
 Additional Products made by 	Nutchino-Logue, Inc.			
IS PRODUCT IS: All Natural				WEW ORDER/ MEW ORDER/

Once all items are added to your order, you can select the "View Order / Checkout" button from any product page. The first step in the checkout process requires the Contact ID number for the person for whom the order is being placed.

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😓 - 🤧 - 🥝 Back Formerd Stop	Belresh Home	Search Favorites	Instead	
Edge	HIV ACCOUNTS - FEDIT	ORDERS / ACCOUNTS VC	ATALOG BHELP BLOGOU	r
Creek				
ADMINISTRATIVE TOOL	My Accounts : Catalog	: Confectionery : Mints : Co	ol Bean Mints Chocolate Mir	4
Chaokout (mar				
Checkout (Step 1				
	-	ase enter their Contact ID	Number.	
	Contact ID Number			
	Contact ID Number	•		
		CONTINUE SHOPPI	NG NEXT STEP	
SEARCH CATALOG				
SEARCH CATALOG PRODUCT/ERNED HEMM/FROTUMER		RCM	- ET SEANCH	1

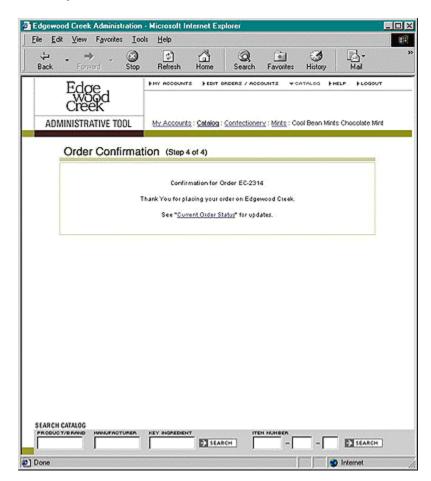
The second step in the checkout process requires that you select the Ship-to Location. Optionally, you may enter the Retailer's PO # (if requested), enter Delivery Instructions (if any), and document the request in the Order Note. You may modify the item quantities on this page, as well. When you are confident all the information is correct, press the "Continue" button.

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k	Forward	Stop	Retresh Home	Se	wch Fa	avontes	History	ны
	Edge Woo Creek	d	HY ACCOUNTS } EDI	T ONCENS	/ ACCOUN	TE VON	muoa 🕨	ern kroson
DI	MINISTRATI	VE TOOL	My Accounts : Catalo	g : Confe	tionery : N	Mints : Cool	Bean Mint	s Chocolate Mir
						a far the second se		
		ut (Step 2 of						
	Ordered by Ship to Your PO# Delivery Instructions f Manufacture Order Note (for EC Only)	your Acco yada yo. 1 Randy ar all	lays after shipment. For unt Manager at 1-800- labor's Own, Bargs Receiver, Fullento	n I	r. N N N he time of		piezre cz	3
	Order Deta	MFG	PRODUCT/ BRAND	SZE	UNIT	PRICE	GTY	EXTENDED
		Hutching Logue. Inc.	Cool Bean Mints Chocolate Mint	Tin	Case	\$84.44	1	\$84.44
	4		Cool Bean Mints	Tin	Case	\$40.32	3	\$120.96
	1	Hutching-Logue, Inc.		Tith				
	1		Chocolate Mint	Tin		ITE	ATOTAL	\$195,40
	1			Title			A TOTAL SCOUNT	\$195,40 (0.0)
	1			Titl				

Step three allows you to verify that all the information from the previous two screens is present and correct. If you need to make changes, press the "Edit Order" button to return to step two. If there are no changes to be made, press the "Place Order" button to execute the order.

Providence Providence <th>- For</th> <th></th> <th>Belresh Home</th> <th></th> <th>R F.</th> <th>avorites</th> <th>History</th> <th>Мај</th>	- For		Belresh Home		R F.	avorites	History	Мај
Provide Your Order (Stop 3 of 4) Analysis of Astronomy Information is correct: State wently all Astronomy Information is correct: State	Edg Cree	ied ,	HV ACCOUNTS \$ EDV	ORCERS	/ ACCOUN	та чсат	ntoa ⊧H	ELP LOGOU
Prease welfy all Adioming information is correct: Salp to: softa Salp to: Randy Receiver d Bill to: softa Salp to: Randy Receiver d Salp to: Randy Receiver d Buyer Name Olen Darzig Your POF Delivery Instructions Order Note (for EC Only) Shipping carriers and costs determined at the time of shipping. This information will appear on your invoice. Order Details Tream Recourt? State (for EC Only) Shipping carriers and costs determined at the time of shipping. This information will appear on your invoice. Tream Recourt? State (for EC Only) Cost Bean Mints Time Sale 504.44 1 Inc. Checolate Mints Tim Checolate Mints Tim Item TOTAL \$195.40 DisCount (0.0) TOTAL \$195.47	DMINISTR.	ATIVE TOOL	My Accounts : Catalo	Confec	tionery :)	Minita : Cool	Bean Mint	s Chocolate M
Bill to: Solip to: Sofia Pandy Receiver Bill A: Sofia Stream Buyer Hame Glen Danzig Your PO# Delivery Instructions Order Note (for EC Only) Shipping carriers and costs determined at the time of shipping. This information will appear on your invoice. Order Details Texes Mutchino Logue. Cool Bean Mints Tin Chooslate Mint Tin Chooslate Mint Tin Case \$40.32 Inc. Chooslate Mint Chooslate Mint Tin Case \$40.32 Discount (0.00) Total \$198.40 Discount (0.00) Total \$199.40 Discount (0.00) Total \$199.40 Discount (0.00) Total \$199.40 Discount (0.00) Total			and the second se					
Your PO# Pelivery Instructions Order Note (for EC Only) Shipping carriers and costs determined at the time of shipping. This information will appear on your invoice. Order Details TEMM Model Hutchino-Logue. Coal Beam Minits Time. Chocolate Minit Time. Tottt			Bill to: sofa e d s, AR 34333		Randy R 675 Got Fullertor	t Lane 0 0 A 92633		
Order Note (for EC Only) Shipping carriers and costs determined at the time of shipping. This information will appear on your invoice. Order Details PRODUCT/ PRODUCT/ Inc. PRODUCT/ PRODUCT/ PRODUCT/ Inc. PRODUCT/ PRODUCT/ PRODUCT/ Inc. PRODUCT/ PRODUCT/ PRODUCT/ Inc. PRODUCT/ PRODUCT/ PRODUCT/ Inc. PRODUCT/ PRODUCT/ PRODUCT/ PRODUCT/ Charolate Mints Tin Case \$90.401 \$904.401 2 Hutchino-Logue. Inc. Cost Bean Mints Charolate Mints Tin Case \$40.32 3 \$120.90 ITEM TOTAL \$195.400 DISCOUNT \$0.90) TOTAL \$195.407 Shipping carriers and costs determined at the time of shipping. This information will appear on your invoice. Shipping carriers and costs determined at the time of shipping. This information will appear on your invoice.		Your PO#	Glen Danzig					
Order Details #sourct/ maxb size unit Price orr #strenoed Price 1 Hutchine.Legue, Inc. Coll Bean Mints Chocolate Mint Tin Case \$964.44 1 \$964.44 2 Hutchine.Legue, Inc. Cool Bean Mints Chocolate Mint Tin Case \$40.32 3 \$120.96 Inc. Chocolate Mint Tin Case \$40.32 3 \$120.96 ITEM TOTAL Stids.40 DISCOUNT (0.0) 01.67 \$104.67 Shipping carriers and costs determined at the time of shipping. This information will appear on your invoice. Shipping carriers and costs determined at the time of shipping.		Order Note (for EC	Shipping carriers an				dishipping	
ITEM# MFG PRODUCT/ PRICE SIZE UNIT PRICE QTV PRICE PRICE CTUPNED 1 HutchinoLogue, Inc. Cool Bean Mints Choolate Mint Tin Case \$94.44 1 \$64.44 2 HutchinoLogue, Inc. Cool Bean Mints Choolate Mint Tin Case \$40.32 3 \$120.96 Inc. Choolate Mint Tin Case \$40.32 3 \$120.96 Inc. Total \$195.40 DISCOUNT \$10.90 \$10.90 \$10.90 TOTAL \$194.67			This information will	appearo	n your ins	oice.		
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Shipping carriers and costs determined at the time of shipping. This information will appear on your invoice.						DIS		
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The final step confirms that the order was placed and accepted by the Edgewood Creek system.



Viewing active and closed orders

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Orders are tied to specific Contacts in the Edgewood Creek system. These are generally buyers, but may technically be anyone. With the design of the Admin section, Contacts are listed on the "My Retailers" page under the Retailer they work for. To see orders for a Contact, click on the Contact's name. This will take you to the Contact Detail page for that person. Active order summaries are listed in a table at the bottom of that page. To see the detailed order information, click on the hyperlinked order number in the order summary table.

Additionally, you can get to the Contact detail page by going through the Account detail page, to the Contact summary page, and selecting a Contact from there.

Lastly, you can pull up orders by using the "Edit Orders / Accounts" function on the global navigation.

Editing an order

To edit an order, use the "Edit Orders /Accounts" page (from the Global Navigation bar). Enter the Order number in the appropriate field and press the "Edit" button.

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The first page asks you to update the header information, including Ship-to address, Your PO number, the Delivery Instructions and the Order Note, as well as the quantity of goods ordered.

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By continuing from Checkout page two, the sub-total is updated and the item quantities are populated and un-editable.

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The final page gives the confirmation that the system has accepted and processed the order.

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Note: It is vital that any changes made to an order be confirmed/verified by a phone call. There is no way of knowing whether or not a manufacturer is farther along in the Pick/Pack/Ship process than the system recognizes, so a phone call is vital to ensure that the changes to an order are made. It is also very important to note that additional line items are treated as a new order, while changes to quantity of existing line items may not be.

Canceling a line item/entire order

To cancel a line or an order, open an order to edit it, and set the line quantity to zero. If all the lines have a quantity of zero, the order is considered canceled. All changes and justifications should be added to the order note.

There are a couple of things to be aware of, however. Canceling lines and orders seems simple, but you need to be aware of the stage in the fulfillment process an order is in, before you cancel it. Unless an order is unread, you should call the effected manufacturers to ensure that the order hasn't been picked, packed or shipped.

Rush orders

As an additional service for Retailer clients, Edgewood Creek will attempt to fill emergency and rush orders when possible. Rush orders will be handled over the phone to guarantee filling and shipping in a timely manner. The order must be then entered into the system with a notation that this was an Emergency/Rush shipment. If the Manufacturer is unable to ship in time, feel free to call the Retailer back and suggest an alternative product.

Purchase Orders:

Components of a Purchase Order

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Order Information

The first box on the PO shows the time and date the PO was generated and the PO Status. It also shows the name of the Retailer and details for the buyer that placed the Order. The most important information may be the Ship-to details listed in the middle of the top box.

Delivery instructions

These are general instructions to all the Manufacturers. They may include the need to write the PO on the box, deliver by 6:00 AM, or call if the order will be shipped partial.

Product Lines

In the product line is listed the name of the item, the item number, the quantity of product requested, the quantity of product shipped, and the ship date

Shipping Information

After the PO is filled and updated, this area will reflect the Shipper Name, Tracking Number, Shipment Cost and Shipment Date.

Viewing active and shipped/canceled POs

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Manufacturer Account	
Corporate Information	
Account Number	4
Company Name	Cafe Tequila
Street Address 1	55 Test Dr.
Street Address 2	
City	Santa Barbara
State	CA
Zip Code	93117
Phone Number	510 225-6223
Fax Number	415-555-5555
Email	test@cafetequilatest.com
URL	www.cafeteguila.com
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Purchase orders are accessible through the navigation bar on the Manufacturer's account detail page. To view current POs, select the "View Current POs" link.

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To view shipped/canceled POs, use the "View Shipped / Canceled POs" link on the Current Purchase Order summary page.

Editing a PO

Because Purchase Orders are automatically generated by the Edgewood Creek order processing system, they are currently not editable. To ensure that there is consistency between Orders and Purchase Orders, any changes to POs must be made by changing the Order they are derived from.

Canceling a PO

In the rare instance where a Manufacturer has suffered catastrophic loss of product, it may be necessary to cancel a PO. Like editing POs, this can only be done by zeroing out the appropriate lines on the Order.

Statements / Invoices:

Viewing statements and invoices

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STATEMENT: July	2000		
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Rather than bill Retailers for every order, Edgewood Creek consolidates orders into monthly statements. Statements are comprised of invoices and invoices are items shipped against Purchase Orders. As explained earlier, Orders are divided into Purchase Orders by the Edgewood Creek system. These Purchase Orders are picked up by Manufacturers online and are printed as pick-slips. The quantities of products that are boxed for shipment are entered into the system and a Packing List is generated. These Packing Lists act as invoices for the Retailers. When all the invoices sent in a given month are collected together, they become the Statement.

To see the Statement and Invoices, go to any Retailer Account details page and select the "View Statements" link. This will bring up the summary view of the Statement for the month previous. To view the invoices, click "additional detail" button. If you would like to see Statements from previous months or years, use the chronological links on the bottom of the page.

Edgewood Creek Account Administrators:

Adding new Edgewood Creek account administrators to the system

Adding new Edgewood Creek employees is as easy as adding a new Contact. Under the "Edgewood Creek System" header is a link to "EC Contacts" which shows a summary list of all Edgewood Creek employees. At the bottom of that page is a link to "ADD NEW CONTACT" Fill in the requisite fields, approve the confirmation, and you have a new employee in the system.

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	555 5555 <u>bab@by</u>							
Contact ID #	Contact Name							
1201	Nina Hagin							
	Contact Phone Contact Email							
	415 555 5550 <u>nina@nina</u>							
Contact ID #	Contact Name							
1222	Sean Seanly							
	Contact Phone			Contact E	wait			
	415 889 8889			sean@sea	0			
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Editing an EC account admin

View any Edgewood Creek employee Contact, and click the "Edit Account" button. Correct any information, commit and confirm any changes, and you're done.

Deleting an EC account admin

There is currently no way to delete an Edgewood Creek employee through the Web interface. Please see the DBA for more assistance.

Changing an EC account admin's password

The only way to change passwords for Edgewood Creek representatives is to use the Edit Edgewood Creek Contact functions.

System Tools

When, why and how to use them

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System tools are very specialized functions used to synchronize the catalog with the Great Plains accounting system. The process is an automatic batch process that is run at least daily. If, and only if, there are problems with the automatic process, should the system tools be used.