Associated Grocers of the South
Online Order Management System
User Guide
Ver. 2018-10

✓ Ordering Machines
  o Review All Ordering Unit Transmissions
  o Review and Modify Order Partitions
✓ Online Ordering
  o Enter Orders Online (Selectable Delivery Days)
  o Search Items and Order Product by Listings
    ▪ Warehouse Category Groups
    ▪ Best Buys (Greatest Savings)
    ▪ Top Sellers (Warehouse Movement)
✓ Delivery Schedule
  o Review Your Store’s Order and Delivery Schedule
# Table of Contents

Accessing the new Online Order Management System: ................................................................. 3  
Order Management System Overview: .......................................................................................... 4  
  Overview - Data Navigation: ...................................................................................................... 4  
  Overview – Search Filters: ......................................................................................................... 4  
Order Management System – Order Machine: .............................................................................. 6  
  Order Machine - Transmission Portal: ......................................................................................... 6  
  Order Machine – Orders, Retails, Tags and Damages: ................................................................. 7  
Order Management System – Online Orders: ............................................................................... 9  
  Online Orders - Search Orders: ................................................................................................ 9  
  Online Orders – Add Order: ..................................................................................................... 10  
  Online Orders – CRC Deals ...................................................................................................... 14  
  Online Orders – Best Buys: ..................................................................................................... 14  
  Online Orders – Top Sellers: .................................................................................................. 15  
  Online Orders – Item Lookup: ................................................................................................. 16  
Order Management System – Delivery Schedules: .................................................................... 17
Accessing the new Online Order Management System:

To access the new online order system the user needs to open an internet browser (Internet Explorer, Chrome, etc.) and go to the main AGSouth website (www.AGSouth.com). The user then clicks on the “AG Members Only” button and signs into the main member website.

Under the “Applications” drop-down menu the user will find a link to the new “Order Management System”.

Clicking this link will let the user log into the Order Management System.

After a successful login, the main Order Management System screen will open.
Order Management System Overview:

The Order Management System has a larger main display area to the right and a smaller navigation pane to the left.

The system is divided into three main areas: Order Machine, Online Orders, and Delivery Schedule. These areas can be accessed by selecting from the tabs located across the top of the main display screen. Information retrieved from various search queries will appear on the main display under the tabs.

Overview - Data Navigation:

Navigating through multiple pages of displayed data is done by using the first page [< and last page >] buttons, the previous page << and next page >> buttons, and the series of page number buttons at the top of the display. For larger screens the number of lines displayed at one time can be altered by the drop down listing 10 [v] at the end of the navigation buttons. The default of 10 lines can be expanded to 15, 20, 25, 30 and 40 lines per page.

Data filter options appear as entry boxes beneath different header columns. Whatever the user types into these filters will change the displayed data to only show items matching what has been keyed in.

The left-side navigation pane will have different options available for the user to select from based on the current Order Management System area being accessed. This navigation pane can be hidden using the arrow button < to the right of the Navigation header and, when hidden, be restored to full view using the expand button X.

Overview – Search Filters:

The Filter options that appear under the Navigation pane will change depending upon the current area the user is in and the type of data being searched.

Generally the type of filters for searches will include the following:
Date Filters are available for various date types including transmission dates, delivery dates, ship dates and creation dates. The user clicks on either the “from” or “to” date selection to access a calendar pop-up.

This calendar will allow the user to select different years, months and days within the month. There is also a slider-bar to select the starting or ending time in hours and minutes. The Now button will set the calendar to today’s date and the current time.

When the date selection is set properly, the user clicks Done to set the date selection.

Check boxes allow the user to turn on and off different selections that will limit some of the data returned from specific search selections. For example the user can choose to include deleted product in their search or to only allow items with active count/re-count deals.

Search Boxes allow the user to type in specific data to search for such as item numbers and item descriptions.

Once all search filters have been set, the user clicks the Search button at the bottom of the filters to initiate the data search.
Order Management System – Order Machine:

The **Order Machine** tab gives the user access to information sent in to AG from the store’s ordering units. Options available under the **navigation pane** include:

**Transmission Portal**
- Orders
- Retails
- Shelf Tags
- Damages

Each **Order Machine** sub-area accessed through the **navigation pane** will also have various **filters** available to fine tune the search for specific orders:

- **Filters** available under **Transmission Portal** include the options for a "from" and "to" range for the “transmit date” to let the user set a starting and ending date to search within.

- **Filters** available under **Retails** and **Shelf Tags** also include an “Item Number” and "File Number" entry to let the user search for a specific warehouse item or transmission file.

- **Filters** available under **Orders** also include a selection for “item errors” to allow the user to see problems in the orders and a drop-down selection list of "partitions" that can be toggled on or off to limit which order types are included in the search.

- **Filters** available under **Damages** include the options for a "from" and "to" range for the “transmit date”, a search entry for a damage reclaim "Box" number, an entry for a "UPC" number from an item and an entry for an AG "File" number.

Order Machine - Transmission Portal:

The **Transmission Portal** page allows the user to search for specific order transmission files sent to AG from the store’s order machine by setting the "from" and "to" dates and clicking the **Get Files** button. All transmissions sent in during the date range will be displayed on the screen in order of the most recent transmission date and time. To see specific details on a transmission file the user can click the arrow button > next to the received date for that transmission. This will drop down a list of the different transmission types held within that specific file and the details of the file itself.
To see the details on the file itself the user can click on the expand button on the right side of the "File Details" block. The user can now see details including the file ID number assigned by AG, the archive file name of the transmission, when the transmission was received at AG, and when the transmission was processed into the order system.

The "Tags" block will show a count of total number of labels requested and the "Retails" block will show a count of the total number of items with new retail updates. The "Damages" and "Orders" blocks will both show an item and case count. The "Orders" block will also have and expand button that will drop down a listing of the partitions held within the order, each with its own case count.

Each block and separate partition also has a "Details" link. When the user clicks this link it will bring up a listing of all items inside that block or partition. These items brought up through the “details” are the same items that would appear if the user made the same search in the Orders, Retails, Shelf Tags, or Damages areas and set the same filters.

**Order Machine – Orders, Retails, Tags and Damages:**

The specific details displayed changes slightly for each area searched.

The Orders area includes basic item information such as the department of the item, the item number, the item description, and the item pack and size. The user also sees the quantity ordered and if any of the ordered items were not shipped. The item’s invoiced retail and gross profit margin are also displayed. If the order has not been processed the user will also have an option to “Edit” the item to change the quantity ordered or to “Delete” the item from the order.
For more information on any item in the list the user can click the arrow to the left of the item to drop down a details panel. Once the order has been billed and invoiced the **Invoice** tab will show the invoice number and date, an Item Sequence if the quantity ordered came from different cost layers, the quantity shipped and not shipped, count/re-count allowances, the item retail and gross profit, and the single and extended case cost.

The **Other Values** tab will show specifics on the transmission such as the order conformation number, the order partition, the serial number of the order unit, who sent the order, the AG internal file number and the date and time the order was received.

The **Shelf Tags** area includes the basic item information along with the quantity of shelf tags requested for the item, the date of the request and the confirmation number of the transmission.

The **Damages** area includes the basic item information along with the reclaim box number, the item UPC number, the quantity scanned for the item, the estimated value amount of the item, the confirmation number of the transmission, and the date of the transmission.

The **Retails** area includes the basic item information along with the retail type selected, the quantity on the retail, the amount of the retail, and the date sent in. Retail types are displayed as **F, P, A or D** (Fixed-price retail, a Percentage based retail, an Amount to be converted to a percentage based retail, and Delete custom retail).
Order Management System – Online Orders:

The **Online Orders** tab allows the user to either "Search" orders in the online system or to "Add" new orders into the online system. The navigation panel also allows the user to view a listing of current CRC Deals by expiration date, to view a **Best Buy** listing of items in order by the total savings in cost, to view a **Top Sellers** listing sorted by total warehouse movement, and to do an **Item Lookup** by selecting from a list of AG categories or by entering either an item number or part of an item description.

The main **Online Orders** page allows the user to choose to either “Search Orders” or "Add Order" by selecting the relative option above the **Filters** on the **Navigation Pane**.

**Online Orders - Search Orders:**

If the user chooses to "Search Orders" the user can set the filter options and click the **Search Orders** button to bring up a listing of all orders. The orders available to search include those keyed into the Online Orders system and also those from various other sources such as Food Shows and Surveys.

If the order has not been processed for billing the user will have the option to edit the items and make updates to the order.
For more information on any item in the list the user can click the arrow to the left of the item to drop down a details panel. Once the order has been billed and invoiced the Invoice tab will show the invoice number and date, an Item Sequence if the quantity ordered came from different cost layers, the quantity shipped and not shipped, count/re-count allowances, the item retail and gross profit, the single and extended case cost, and a reorder date. The reorder date will show only for an order type setup for automatic reordering of any product where quantities were not shipped.

The Other Values tab shows information such as the Order ID, the Order Type, the Status, the Create Date, the User who keyed the order, and the Exported date/time. Status codes include “D” (Deleted), “SS” (Store Suspended), and “IB” (Item Blocked).

The Change Audit tab shows any changes made to an online order for quantity, cost or delivery date.

**Online Orders – Add Order:**

If the user chooses to "Add an Order" the user has the option to key in an AG item number into the Online Orders panel. A valid item number will display the item description and activate the **Order** button that, when clicked, will pop-up a new item order dialog box with the following tabs: "Order Item", "Item Movement", "Item Pricing", "CRC Deals" and "Item Image". Once the ordered is placed the **Save** button will save the item to the order and the **Close** button will close the order dialog box.
The "Order Item" tab shows basic item information, case count per pallet, total cases in the warehouse, the store's average weekly movement based on 13 weeks’ purchases, cases ordered and not shipped, and options for an order quantity and delivery date to be entered by the user.

The "Item Movement" tab shows the item's average weekly movement based on cases purchased by the store each week over both a 13 week and a 52 week period. Also displayed is a breakdown of any cases of the item that have not shipped but have been ordered through the online system and also through an order machine.

The "Item Pricing" tab shows all available layers of cost currently in warehouse inventory, the quantity available to order from each layer, the base layer price, the store cost with markups, any current count/re-count deal, when the count/re-count deal ends, the store’s delivered cost of the item for both case and single unit, and the store’s retail from the last printed label along with the GP% calculated from the current delivered cost.

On the “Item Pricing” tab there is also a section which allows the user to see if the current item has an existing CRIP (custom retail price) and to set a new CRIP. An existing CRIP that has been applied to the main system will be shown as “active”. A new CRIP that has been placed but not applied will show as “pending”. The user may also submit a request for a new shelf tag to be printed and sent to the store for the current item.
To set a CRIP on an item in the “Item Pricing” tab select your CRIP type, set your rules and click the “save” icon. The same rules as using an ordering machine apply: the user has options to set an item’s retail by Fixed, Percentage, Amount to Percent or Delete.

- **Fixed**: A quantity and price combination that sets a permanent price that stays locked until the user makes another change to the retail.
- **Percent**: A percentage amount that will be used to create a retail based off of the current cost of the item. This retail will automatically change with changes in the cost of the item.
- **Amount to Percent**: A quantity and price combination that is used to create a percentage based off of the current cost of the item. The retail will automatically change with changes in the cost of the item.
- **Delete**: A reset will be done on any current CRIP for the item and return the retail to the default zone pricing.

There is also an option to “Request Shelf Tag” on the “Item Pricing” tab. The user can request a single label for the current item by entering a “1” and clicking the “save” icon. Multiple shelf labels can be generated for the item by entering a larger number (example: front-end candy racks). This request quantity will remain in effect until a new request with a new quantity is entered for the item.

The “CRC Deals” tab will display any current and future count/re-count deals for the item and show the start and end dates of the deal and the discount per case ordered.

The “Item Image” tab will display the current image (if one exists) that is also printed on the retail shelf labels sent to the store.
Online Orders – CRC Deals

If the user selects **CRC Deals** from the navigation panel a listing of current **Count and Recount Deals** will be displayed on the screen. The CRC deals are limited time price reductions taken off the case cost for qualifying items ordered by the stores before the expiration of the CRC deal.

The listing will be ordered by the closest expiration date and then by the item numbers within that expiration date. Deals with the shortest time remaining for ordering will be at the top of the listing. The total items listed will vary depending on the total items with active CRC deals. Basic item information is displayed along with inventory quantity on hand, the base case cost of the item, the current CRC deal, and the expiration date of the deal. Each item listed has an **Order** button that will display the same order dialog box as on the main "Online Orders" page.

![Count and Recount Deals](image)

Online Orders – Best Buys:

If the user selects **Best Buys** from the navigation panel the **Top 100 Best Buys** page will be displayed. This page lists the top 100 items by the largest savings percentage between the vendor list cost and the best layer cost in warehouse inventory. Basic item information is displayed along with inventory quantity, the actual savings percentage, vendor list cost, and warehouse case cost and unit cost. Each item listed has an **Order** button that will display the same order dialog box as on the main "Online Orders" page.
Online Orders – Top Sellers:

If the user selects Top Sellers from the navigation panel the Top 200 Best Sellers page will be displayed. This page lists the top 200 items by the highest warehouse movement amount over the prior 52 weeks of sales. Basic item information is displayed along with inventory quantity, the prior 52 weeks' movement, and any count/re-count deals currently active. Each item listed has an Order button that will display the same order dialog box as on the main "Online Orders" page.
Online Orders – Item Lookup:

If the user selects **Item Lookup** from the navigation panel the **Item Lookup** page will be displayed. This page gives the user an area to perform various searches through the warehouse item file. Under the "Filters" in the Navigation pane the user has options to pull up item lists by selecting a warehouse category, search by item order number, and search by partial item description.

Under the "Select Category" section a top-level listing of warehouse departments is displayed. By clicking the arrow to the left of a department name the user can open the listing of categories under that department. Clicking on one of the category names will display a listing of all items held within that category.

The user may type in a warehouse item order number in the "Item Number" search box. This will display the single item.

The user may type in part of an item description in the "Item Description" search box. This will display all items that contain that exact character series.

The user may also type in the UPC from the product in the “Unit UPC” search box to locate an item.

Each item brought up in a search has an **Order** button that will display the same order dialog box as on the main "Online Orders" page.
Order Management System – Delivery Schedules:

The Delivery Schedules tab allows the user to see a listing of the store's ordering and delivery schedule for the week. The only option here is the Get Deliveries button that, when clicked, will display the delivery schedule for the store.

There are three separate delivery schedules with the schedule designated as "1" being the normal weekly schedule and the schedules designated as "2" or "3" being alternate delivery schedules setup specifically for when the normal delivery schedule needs to be adjusted (as for holidays that fall on a store's normal delivery day).

Under the normal delivery schedule "1" there will be a separate line for each delivery day of the week. If a store receives a truck on Tuesday and Friday there will be a schedule "1" for "Tuesday" and a schedule "1" for Friday". To the left of any schedule number/day is an arrow button that the user can click to drop down a listing detailing the departments that can be ordered, the latest day and time to place the order for the billing, and the day and time the billing will occur for that order.