Order Express
FSM User Manual

Last Update: 01/30/07

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What is Order Express?

Order Express is a proprietary, on-line order entry tool, designed for the field to manage their accounts and to enter QSP orders for their customers. Users may add new accounts, modify existing accounts, enter product orders and monitor the complete process of these orders.

Other Food (Hershey & Popcorn) and WFC Stock Chocolate order forms are now available to support the school business. The development of other forms will continue until forms for all QSP Programs become available in Order Express.

Overview

Order Express enables its users to do the following:

- Create new accounts
    1. From the MDR Directory
    2. From the QSP Organization Directory
    3. From existing accounts
    4. For new organizations
- Renew and/or modify existing accounts
- Create new organizations from the MDR Directory, or for non-MDR organizations
- Create new product orders for accounts
    1. With or without tax exemption forms
    2. To process at a later date, or to submit for immediate processing
- Modify and/or cancel incomplete or saved product orders for accounts
- Check the status of product orders from an Order List and/or a Note List.
- Check tax information for an account from an Account and/or Organization List.

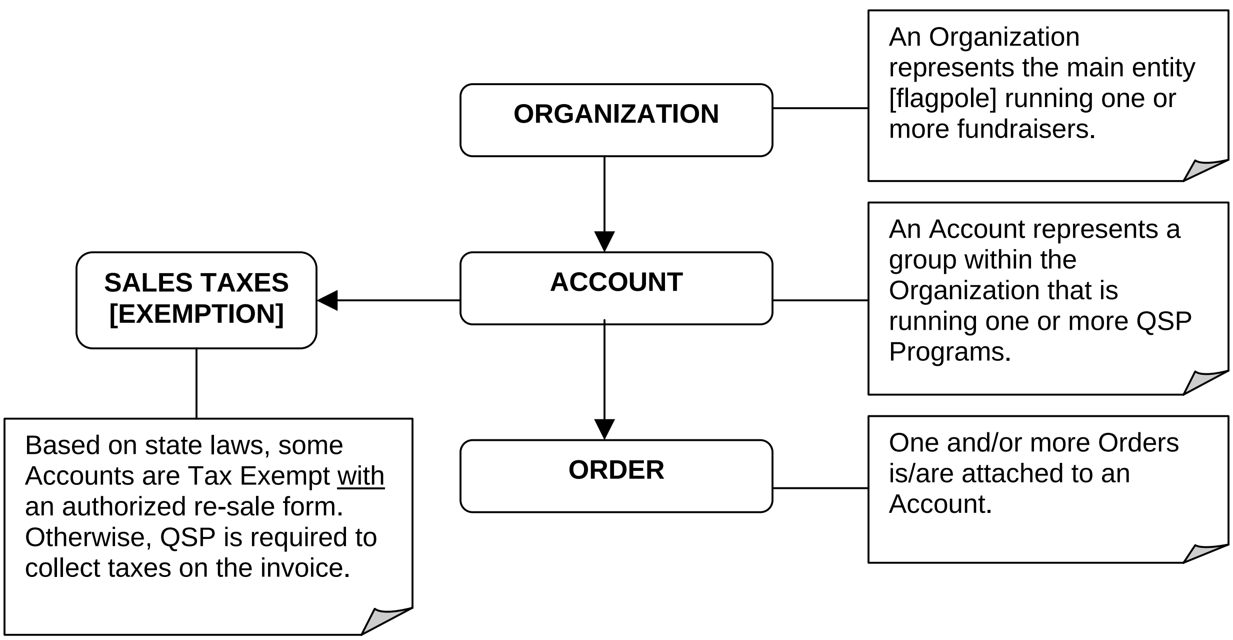
Chapter

1

General Concepts

🕮 THE CONCEPT OF AN ACCOUNT

The diagram below demonstrates the Account entity within the entire Model.



In this Model, the Account represents a group within an Organization [flagpole] that is running one or more QSP Programs. An Account can only be associated to one QSP Program type at a time. QSP Program types include Magazine/Music/Book, Gift, Chocolate, Other Food, etc. Likewise, an order can only be associated to one Account.

Order Express supports various business rules that apply to all QSP Programs, i.e. lead times, case minimums, freight charges, etc. As needed, Order Express can easily be modified to reflect any changes. Various pop-up messages and business rules are displayed throughout the application to maximize data/order integrity.

Chapter

2

Business Rules

🕮 GENERAL RULES

Rule:	**Lead Time [Based on Business Days]**
Form(s):	Lead-times noted in system; vary based on product
Applies To:	Product Orders – Common Carrier
If:	Less than Business Days
Then:	Exception Noted By System
Action:	Order released to Warehouse
If:	QSP cannot meet requested delivery date without Expedited Freight
Then:	FSM is contacted and, if Expedited Freight is incurred, charges will be recovered from employee's 12-pay.

Rule:	**Case Minimum**
Form(s):	Minimums noted in system; vary based on product
Applies To:	Product Orders
If:	Less than Case Minimum
Then:	System does NOT accept – NO EXCEPTIONS
Action:	User must change case quantity
If:	No change made
Then:	System error stops order/order NOT processed

Rule:	**Pro Code and Number of Cases**
Form(s):	Other Food and WFC Chocolate Order Forms Does not apply to Popcorn Program
Applies To:	Product Orders
If:	Pro Code is greater than Number of Cases
Then:	System does NOT accept – NO EXCEPTIONS
Action:	User must change quantity
If:	No change made
Then:	System error stops order/order NOT processed

Rule:	**Pro Code and Number of Cases**
Form(s):	Other Food and WFC Chocolate Order Forms Does not apply to Popcorn Program
Applies To:	Product Orders
If:	Pro Code is greater than zero <u>and</u> Number of Cases is blank or zero
Then:	System does NOT accept Pro Code – NO EXCEPTIONS
Action:	User must delete Pro Code
If:	No change made
Then:	System error stops order/order NOT processed

🕮 TAX EXEMPTION RULES

Rule:	**Tax Exemption # & Expiration Date Fields** **Current Form Must Be On File and Data Reflected In System**
Form:	State Tax Exemption Form
Applies To:	State Tax Laws [Tax Chart available on Account Track]
If:	Tax #/Expiration Date fields are blank on Account Detail page
Then:	If applicable, system indicates Tax Exempt form is required in Account Note Section
Action:	Order processed by system
Then:	When Tax Exempt form is received, data is recorded in system.
Note:	**Until Tax Exempt form is received and data is recorded, an invoice is generated with applicable taxes. If applicable, tax adjustments [to correct an invoice] will be processed by the Accounting Department [same as today].**

Chapter

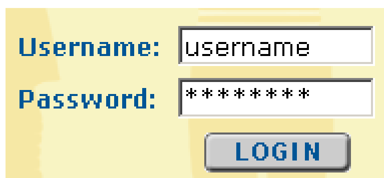
3

Basic Functionalities

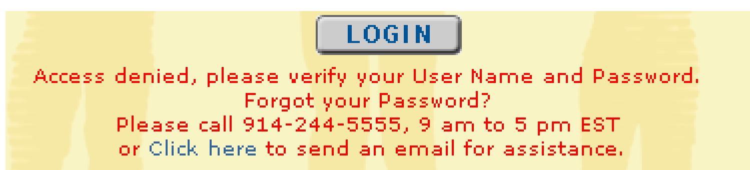
HOW TO LOGIN

- Use the Order Express website: **http://www.orderexpress.qsp.com**. Or, click on the Order Express hyperlink located on the Home Page of Account Track.

- On the Home Page of Order Express, enter the Username and Password; then click on *Login* button.



Note: An error message is displayed if the Username and/or Password are incorrect. Usernames and Passwords are the same as Account Track.



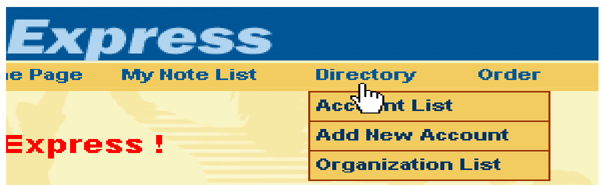
- The Menu Bar, located at the top of the page, contains 5 options:

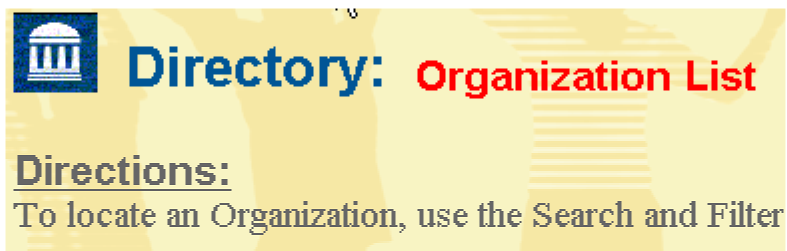
1. Home Page – Contains 'Welcome' Message, Support Info and, if applicable, a Note Alert.
2. My Note List – Contains list of emails sent to user
3. Directory – Contains Account List, Add New Account and Organization List
4. Order – Contains Add New Order for Other Food and WFC Chocolate
5. Logout – Contains a hyperlink to sign back into Order Express, as well as Support Info.

HOW TO FIND AN ORGANIZATION

- **Understanding the definition of an Organization is very important**.
  An Organization represents the main entity [flagpole]. It can be a school, sorority, church, etc. While an Organization may have one or more Accounts, there can only be <u>one</u> Organization for an Account[s]. Order Express assigns a unique QSP ID Number to every Organization and maintains a link between the Organization and the EDS Account Number[s].

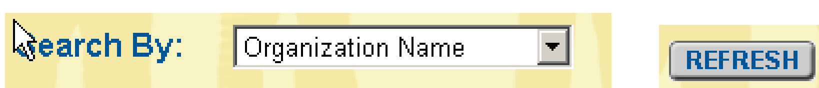
- In the Menu Bar, click on *Directory* to access a menu; then click on *Organization List* and a new window will open with directions.



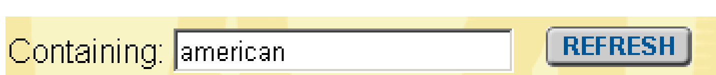


- There are several ways to search for an Organization.

  Click on the *Search By* drop down arrow and select either the Organization ID, Organization Name, City or Zip Code and click on *Refresh* button.



  Enter part of the Organization's name in the *Containing* text box and click on *Refresh* button. The Organization's name must be an EXACT match; otherwise, the system will not find it.



Click on the first letter of the Organization's name to access a list of names that begin with this letter.

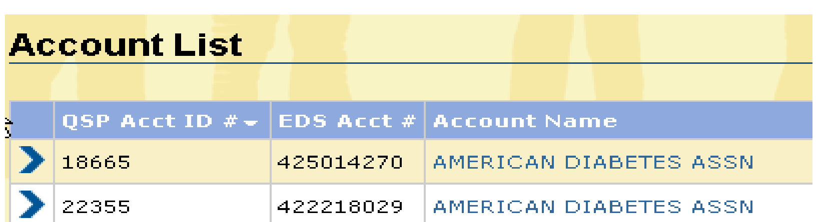
- Several filters are also available to find an Organization.

  To filter the results by Organization Type or by State, select the filter criteria within the corresponding drop down menu and click on *Refresh* button.

A new window will open with a list of Organizations. To resort the list, click on one of the column headings, i.e. click on the *Account Name* column and the page will refresh with the same list in alpha [ascending] order.

The Display Options menu also filters accounts in your territory as noted below.

- When the Organization is found, click on the Organization name and a new Organization Detail page will open**. NOTE: Organization Detail page includes an Account List with an EDS Account # tied to an Organization. You may ONLY edit OTHER FOOD and WFC CHOCOLATE Accounts/Organizations at this time. Access to MMB or GIFT Accounts is VIEW ONLY.**

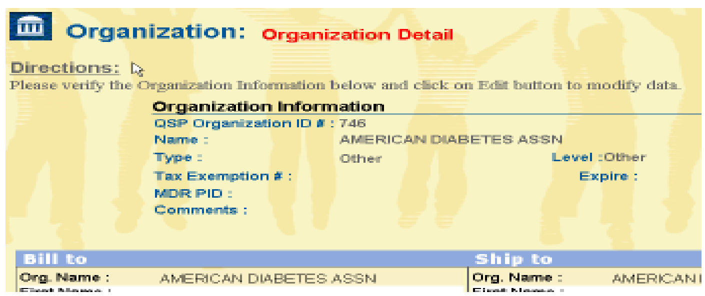


HOW TO FIND AN ORGANIZATION [CONTINUED]

- The Organization Detail page also includes Tax Exemption information based on tax forms received from the field/accounts and recorded in the QSP system.

HOW TO MODIFY AN ORGANIZATION

- To modify an Organization, open the Organization Detail page.



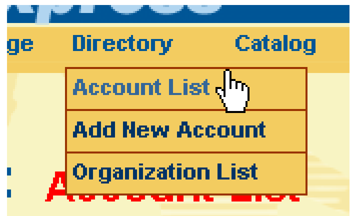
- At the bottom of the page, click on *Edit* button and a new window will open with various text boxes. **Note: All required fields are designated with an asterisk [*]. An error message will be displayed on the page when a required field is not completed.**

- If the 'Bill To' <u>and</u> 'Ship To' Information are <u>exactly</u> the same, complete the required fields (*) on the billing side and click on *Copy Address From Bill To* button. The page will refresh the shipping side to match the billing information.

- When this is done, click on *Save* button.

HOW TO FIND AN ACCOUNT

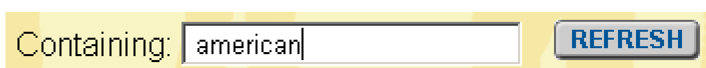
- Click on *Account List* under *Directory* in the Menu Bar at the top of the page.



- Searching for an Account is the same as searching for an Organization.

  Click on the *Search By* drop down arrow and select either the Account Name, City, EDS Account #, FSM ID, FSM Name, QSP ID or Zip Code and click on *Refresh* button.

  Enter part of the Account's name in the *Containing* text boxes and click on *Refresh* button. **Note: The Account name must match exactly; otherwise, the system will not find it.**



  Click on the first letter of the Account's name to access a list of names that begin with this letter.

- To filter the results by QSP Program, by State, and/or by Display Options, select the filter criteria within the corresponding menu[s] and click on *Refresh* button.

HOW TO FIND AN ACCOUNT [CONTINUED]

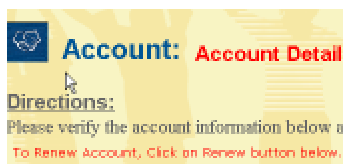
A new page will open with a list of Accounts. As noted below, to resort the list, click on one of the column headings, i.e. click on the *Account Name* column and the page will refresh with the same list in alpha [ascending] order.

Page 1 of 1 Click on Column Headings to Resort Data.

		Status	QSP Acct ID # ▲	EDS Acct #	Account Name
❯		Processed	352376	030005270	AMERICAN DIABETES ASSOCIATION

Note: In this example, the 'processed' status pertains to the creation of a new account for the American Diabetes Association.

- When the Account is found, click on the Account Name and a new Account Detail page will open with directions.



- The Account Detail page also includes Tax Exemption information based on forms received from the field/accounts and recorded in the QSP system.

QSP Program :	WFC Chocolate	
Default Warehouse:	MEYER ❯	
Tax Exemption :	EX #146001297 9/00	Expire :

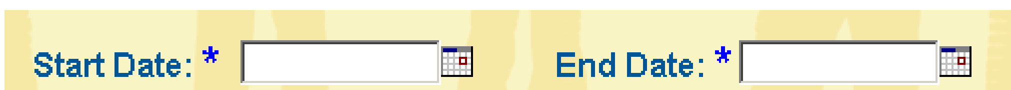
HOW TO MODIFY AN ACCOUNT

- At the bottom of the page, click on *Edit* button and a new window will open with various text boxes. **Note: All required fields are designated with an asterisk [*]. A new window will open with an error message until all required fields are completed.**

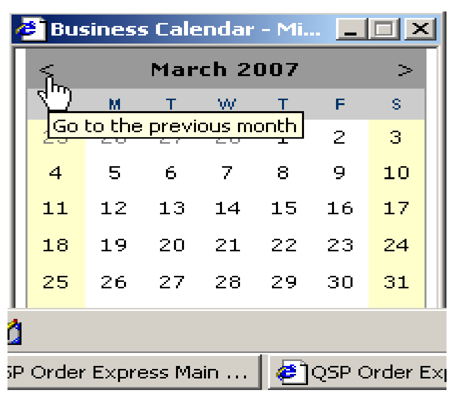
- To modify an Account, edit the text boxes in the *Account Detail* page. Modifying an Account automatically renews it in the QSP system. **Note: Editing Account Information is the same as editing an Organization.**

- To access historical information about an Account, click on *View History* button.
NOTE: This information ONLY pertains to setting up and/or editing an Account in the system. It does NOT reflect any orders for this Account. All orders are reflected in the Order List.

- To modify the *Start Date/End Date*, use the calendar feature by clicking on the small image next to the *Start Date* and *End Date* text boxes.



Then click on the desired dates to automatically populate the respective date fields. Use the forward [>] and backward [<] arrows to select a different month, if applicable. The dates may also be keyed directly in the text boxes as MM/DD/YYYY.



Note: The Start Date calendar automatically defaults to the current month and the End Date automatically defaults to the selected Start Date. The system validates <u>both</u> dates to make sure the End MM/DD/YYYY is always <u>greater</u> than the Start MM/DD/YYYY; otherwise, an error message is displayed until the date range is corrected.

🕮 HOW TO MODIFY AN ACCOUNT [CONTINUED]

When all the Account Information is modified, click on *Save* button.

Note: The *Cancel* button closes the Account without changes. The Account remains 'as is' and the system automatically re-opens to the Account.

🕮 HOW TO CREATE A NEW ACCOUNT

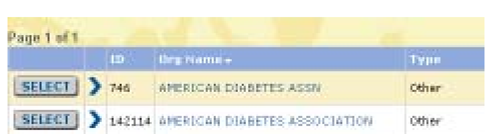
- Click on *Add New Account* under *Directory* in the menu bar and a new window will open with Directions.

- To create an Account, an Organization must exist. Select from the following three [3] options:

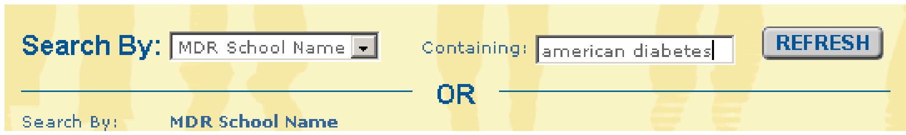
1. It is extremely important to check the *QSP Organization Directory* first. Therefore, a system default is set for this directory.

- To filter the results by Organization Type, by State, and/or by Status, select the filter criteria within the corresponding menu[s], and/or enter the FSM data and click on *Refresh* button.

  Enter the Organization Information in desired *Search By* text boxes and click on *Select* button next to the desired Organization.

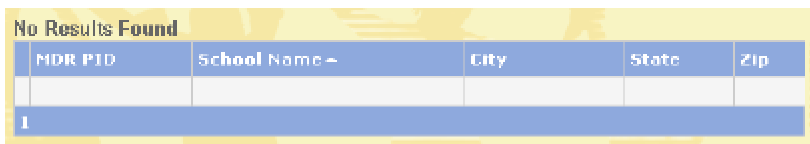


2. To find an existing school from the *MDR Directory,* click on *MDR Directory* button.

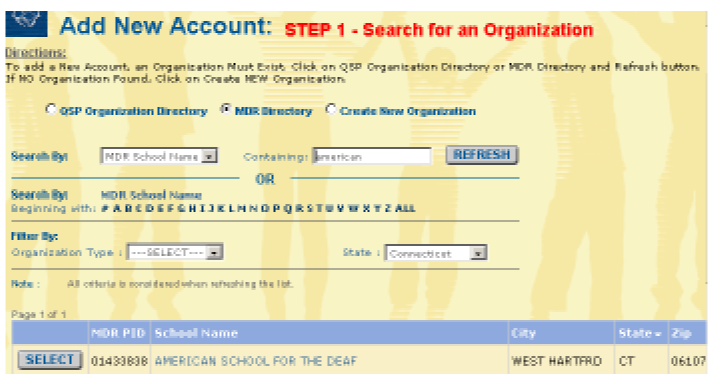


Enter the Organization Information in desired *Search By* text boxes and click on *Select* button next to the desired MDR School/Organization.

The example below demonstrates an MDR Search with <u>NO</u> results.



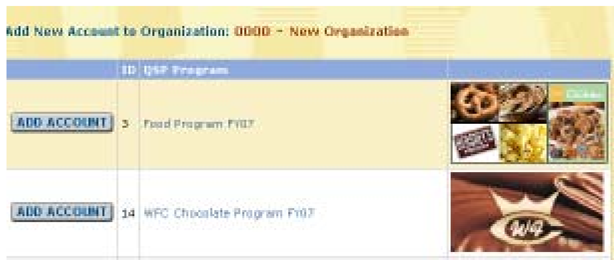
This example shows an MDR Search <u>WITH</u> results. It is based on the following filters: 'American' [keyed in 'Containing' text box] and 'Connecticut' [selected from 'State' menu].



3. **ONLY when Steps 1 and 2 fail,** create a new Organization by clicking on *Create New Organization* button.

HOW TO CREATE A NEW ACCOUNT [CONTINUED]

4. A new window will open with Directions to Add New Account to Organization. Click on *Add Account* button next to the QSP Program the new Account is running.



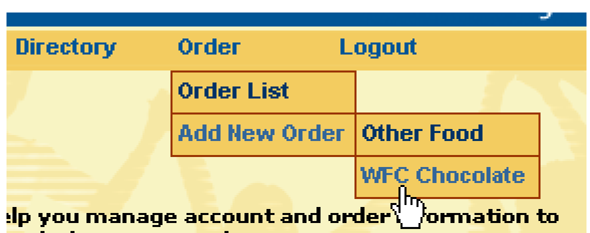
Note: To avoid a duplicate Account error in the database, before a new Organization is created, make sure it <u>does not exist</u> in <u>both</u> the QSP <u>and</u> MDR Directories.

Complete the Account Information in the appropriate 'Bill To' and 'Ship To' text boxes, select the Start/End Dates and click on *Next* button

5. When the new Account Information is completed, click on *Save* button.

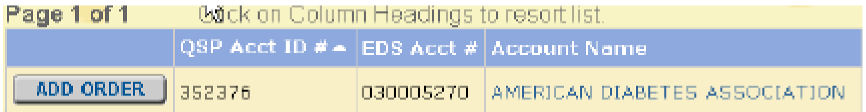
HOW TO CREATE A NEW ORDER

- Under *Order* in the Menu Bar, place the cursor over *Add New Order* and click on the correct QSP Program.

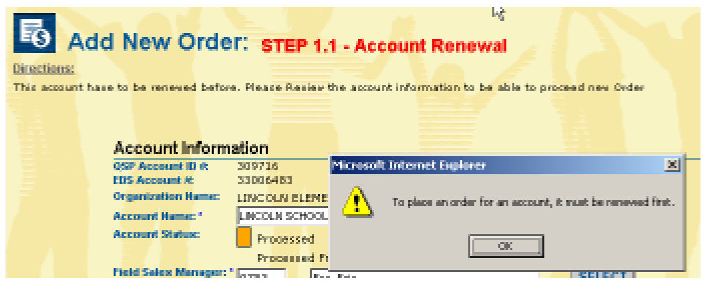


- Select the Account using the available search/filter options.

- When the Account is found, click on *Add Order* button next to the Account name.



- When the selected Account has not been renewed in the system, a message pops up. Click on *OK* button, update the required fields on the Account Information page and click on *Next* button to continue.



- Select an order form by clicking on *Add Order* button next to the correct order form.

- Review and/or modify the Account Information, if applicable.

  Note: As noted in the Directions, edits can only be made to the 'Ship To' Information and will only impact the shipment of this order. To edit the 'Bill To' Information, follow the Directions at the top of the page.

- When the Account Information is correct; click on *Next* button.

- A new window will open with an order form to capture the Order Detail.

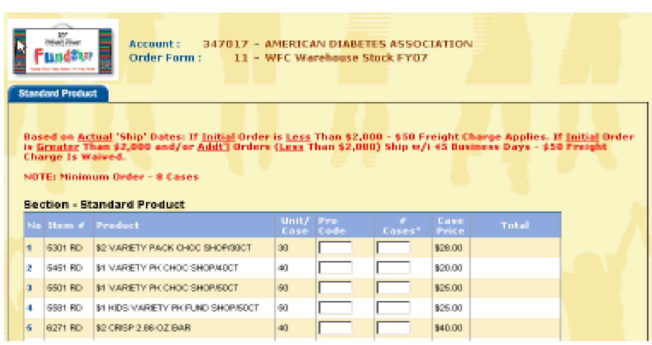
- Follow the Directions and complete the text boxes for Pro Code and/or # Cases. The system automatically calculates the 'Total' for each applicable line item.

  Note: If the Pro Code and/or Case Minimum business rules are not met, the system will display an error message until the order is modified to meet all the requirements.

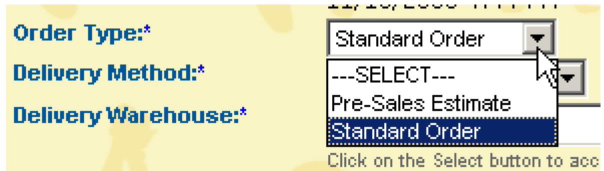
- As noted in the directions, the system automatically adjusts the prices under Total to <u>exclude</u> the Pro Codes [free cases] keyed in these text boxes.

  Note: If the Pro Code quantity is greater than the Case quantity, an error will occur until the order form is corrected. The same error occurs, if the Pro Code quantity is greater than zero and the Case quantity is blank or zero.

- When the order is complete, click on *Next* button. A new window will open with the Order Information.

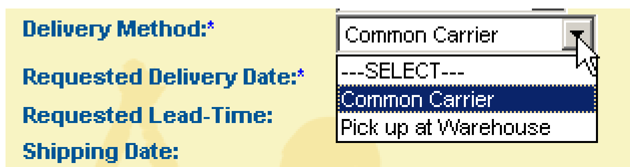


- Select the Order Type from the corresponding menu.



Note: A 'Submitted' Pre-Sales Estimate order temporarily HOLDS the product in inventory until it is changed to a Standard Order and re-submitted. After 7 calendar days of the requested delivery date, if the order has not been changed, the product is automatically removed from the system and no longer held for future delivery.

- Select the Delivery Method from the corresponding menu.

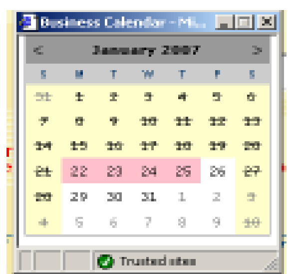


- A warehouse pick-up option is also available. Click on *Pick Up at Warehouse* and a new window will open with two Delivery Warehouse text boxes. Click on *Select* button to access a list of 'Will Call Pick Up' Warehouses, as well as a map of these locations.

- Use the *Search By* features to find the appropriate warehouse and click on *Select* button. The page automatically refreshes the Step 5 - Order Information page and populates the warehouse information.

- To access Product Inventory for a specific Warehouse, click on the Warehouse Name; then click on the Product Inventory tab. **Note: Be sure to read the directions as the inventory is NOT 100% accurate.**

- Use the calendar to select the product delivery date. The required business days are shaded on the calendar and the business rule is noted in red text, to encourage adherence to this rule. **Note: When calculating the Lead-Time, the Current Business Day always counts as Day 0.**



- When the delivery date is <u>less</u> than the required lead-time, a message box pops up with a request to modify the date. Please adhere to the required lead-time, whenever possible. The system will allow you to continue <u>with</u> no modification to the date. In this case, the order is still accepted, released to the warehouse and noted as an exception.

  Note: If an order cannot be delivered on time, you will be contacted <u>directly</u> to make other arrangements.

- Use the Comment text box to include special comments about the order, i.e. inside delivery, call before delivery, etc.

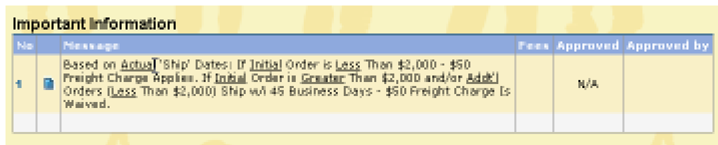
- If necessary, use *Back* button [lower left] to access and/or to review/edit previous pages.

Note: Use caution when using this feature. Going back several pages, i.e. to the page where the order form is selected, will delete the entire order and it will be necessary to start over.

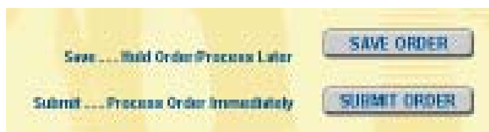
- When the order is complete, click on *Next* button and a new 'Order Validation' window will open with details of the order. At this time, it is important to carefully validate the accuracy of the order and use the *Back* button, if necessary, to modify the order.

- The Account Information for this order includes an *Account Note* regarding the Tax status. In the example below, a tax exemption form is not required. **Note: If applicable, the *Account Note* will indicate if a tax exemption form is required. [A form is required to be on file with the tax information recorded in the system.] Regardless of the form status, a Submitted order is released to the warehouse for shipment. When the system is updated, the tax information is reflected on the Organization and Account Detail pages.**

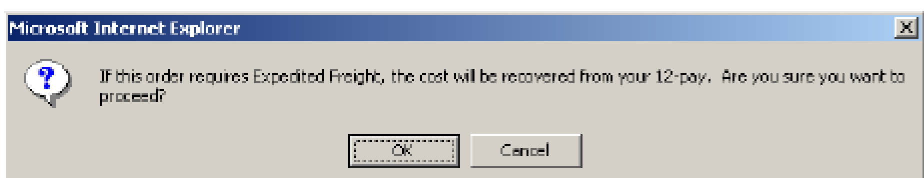
- The Important Information section is used to provide information about an order and/or to identify all exceptions for an order.



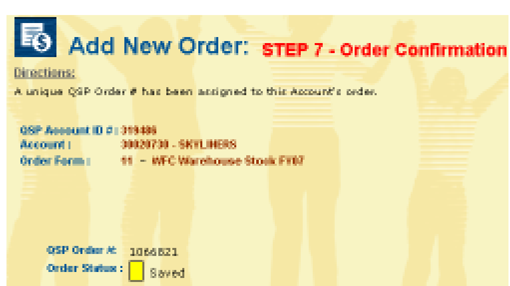
- When the order is validated in Order Express, it can be saved to process later, by clicking on the *Save Order* button, or submitted to process immediately, by clicking on the *Submit Order* button.



Note: When you click on *Submit Order* button <u>and</u> the order <u>may</u> require expedited freight, a message pops up acknowledging the FSM recovery of the freight cost. By clicking on *OK* button, you accept responsibility for this recovery <u>only</u> if it is incurred. To change the requested delivery date, click on *Cancel* button and go back to the appropriate page to modify the date to meet the business rules as noted on the 'Order Information' page.



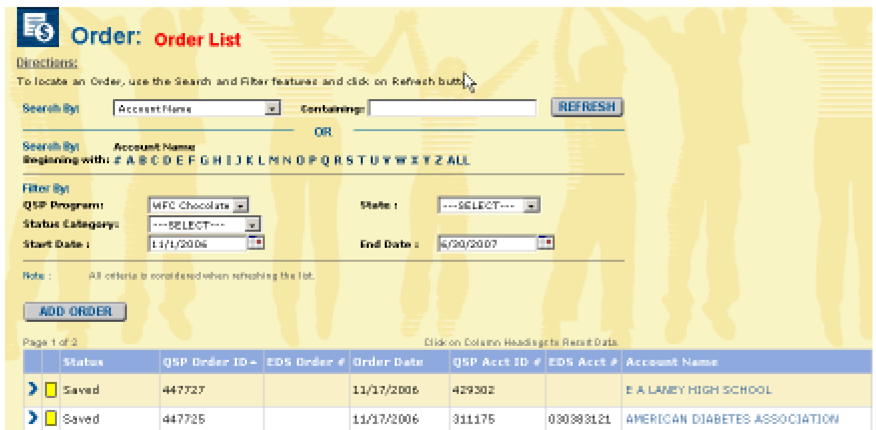
- A new 'Order Confirmation' window will open. It includes the unique QSP Account ID and Order numbers, as well as the Order Status.



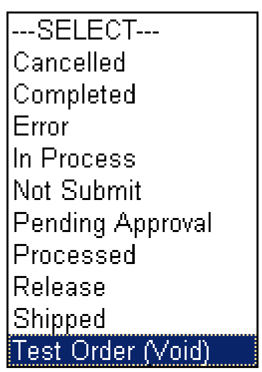
HOW TO VIEW AN ORDER

- Go to the Menu Bar and click on *Order List* in the *Order* menu. The *Search By* and *Filter By* directions are the same as previous lists, so use the filter criteria to select an order.

- When the order is found, click on the Account Name in the *Order List*. If this is done immediately following data entry, the order for that Account Name will appear at the top of the *Order List*. Otherwise, the list may be resorted to find it.



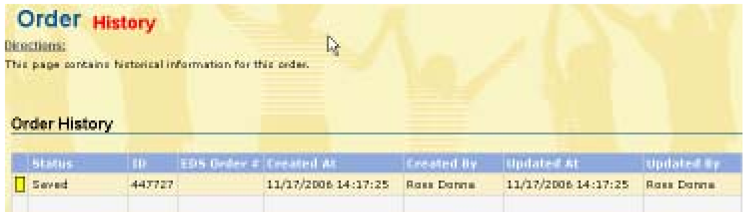
- A *Status Category* filter is also available on the Order List page. Click on the drop down menu, select a status and click on *Refresh* button to see a list of orders with the status selected, i.e. Processed.



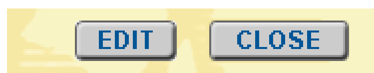
- When an Account is selected from the Order List, a new page will open with the Order Detail. At the bottom of the Order Detail page, there is a section that provides detailed Audit Information. It also includes a *View History* button.

HOW TO MODIFY AN ORDER

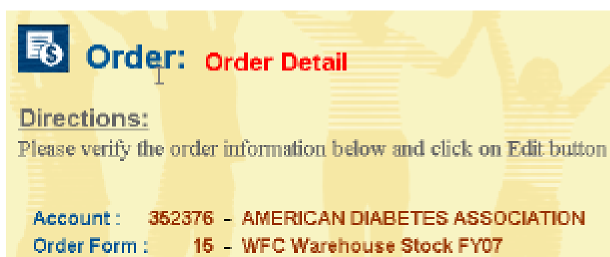
- The *View History* button will open a new page containing the order history for an Account.



- Click on *Edit* button to go back and modify any data. Otherwise, click on *Close* button to leave this page. **Note: The capability to edit an order depends on its status. If an order has been processed or released, immediately contact QSP Field Support**



- As noted above, go to the Order List, select an Account and it will open the Order Detail page for this order.



- Follow the directions and click on *Edit* button at the bottom of the page to modify the order, if necessary. A new window will open with detailed Account Information and Order Information.

- If the Order does not require any edits, click on *Confirm* button.

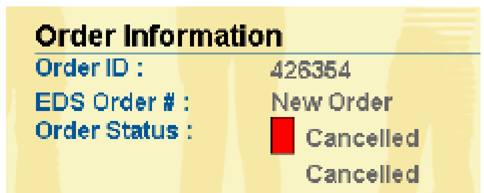
- After reviewing an order, if no changes are necessary, click on *Close Without Change* button. The order remains 'as is' and the system automatically goes back to the Order List.

🕮 HOW TO MODIFY AN ORDER [CONTINUED]

- To cancel an order, click on *Cancel* button.

Note: The ability to cancel an order depends on its status, i.e. if it is 'Processed' or 'Released', the system cannot cancel the order. An immediate phone call to QSP Field Support is necessary to determine if it can be cancelled outside the system.

- When an order is cancelled in the system, a new 'Order Detail' window will open immediately, reflecting the change in status.



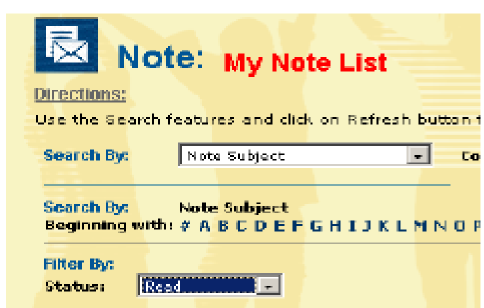
IMPORTANT NOTE: Whenever an order is modified, the Lead-Time is automatically re-calculated based on the Current Business Day.

🕮 HOW TO USE THE MY NOTE LIST

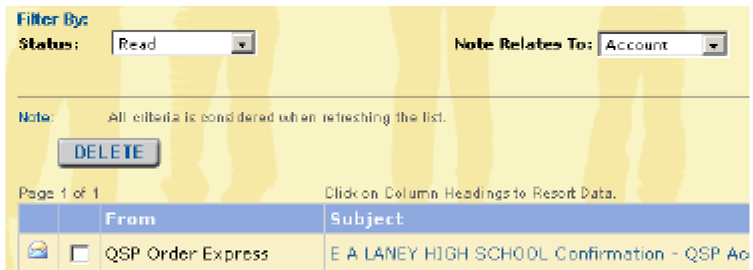
- Go to the Menu Bar and click on *My Note List*.

- There are several ways to search for a Note.

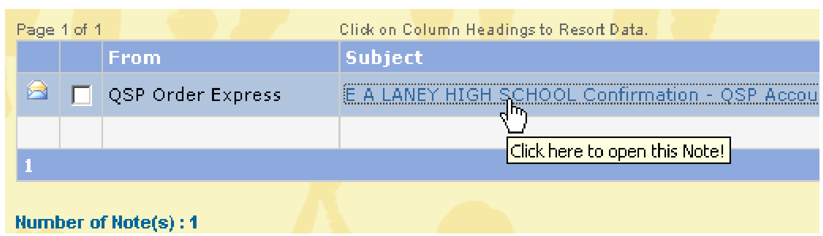
1. Using the *Filter By* feature, select a Status, either 'Read' or 'Unread' from the menu list.



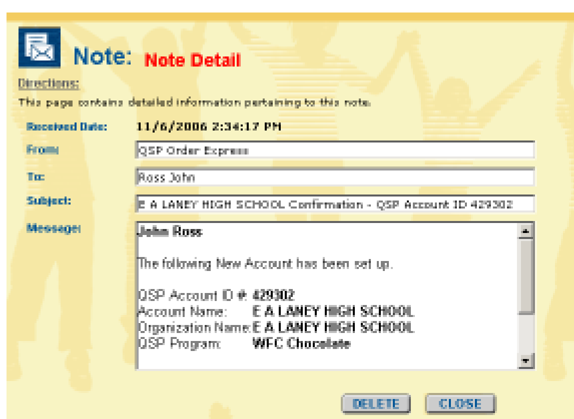
2. Another filter, 'Note Relates To', includes two options: Account and Order. Select one or both of these filter criteria and click on *Refresh* button. A new window will open with a list of Accounts.



- To read a Note, click on the Account Name within the list.



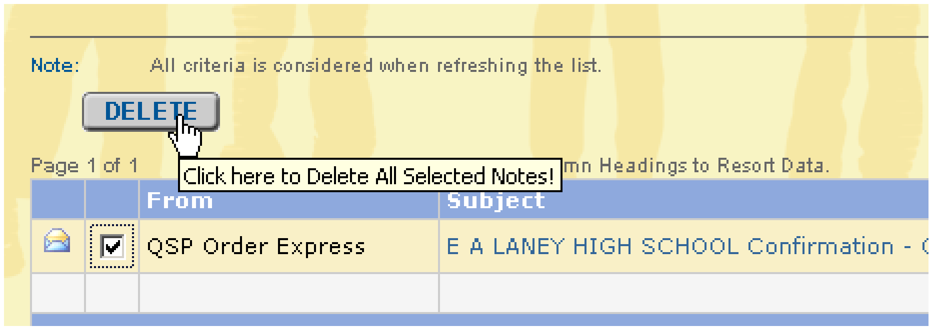
- A new window will open containing the Note Detail.



- After reading the Note, click on *Close* button to save the Note or click on *Delete* button to permanently remove it from the system.

HOW TO USE THE MY NOTE LIST [CONTINUED]

- A Note may also be deleted on the My Note List page, by checking the text box that pertains to the Account and clicking on *Delete* button.



- Notes are system generated to confirm the successful creation of new Accounts and/or new Orders.

🕮 FOR TECHNICAL & NON-TECHNICAL SUPPORT

Contact information for technical & non-technical support can be found at the bottom of ALL pages in Order Express:

For Technical Support, please call QSP Help Desk at 1-866-238-3272, M-F, 9am to 5pm EST.
During non-business hours, call 1-866-238-3272 and leave a message.
For Non-Technical Support, please call QSP Field Support at 1-800-341-4454 and press 1.

We appreciate your input!