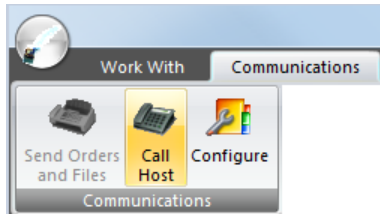


POET EVERYDAY INSTRUCTIONS

Every Morning:

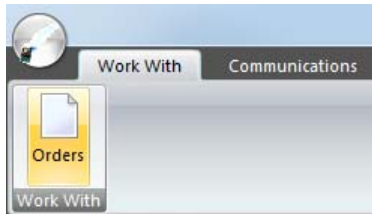
- Open POET.
- Click the **Communications** tab.
- Click **Call Host**.



- The Ai2 Connection Manager will open, download and process updates, and close when completed.

Setting an Active Customer:

- Click the **Work With** tab.
- Click **Orders**.



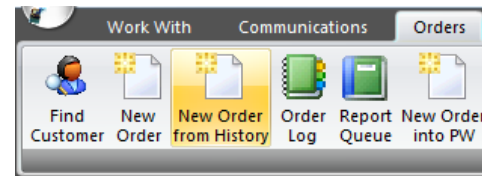
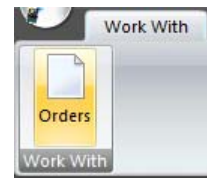
- To set a Customer as Active, do one of the following:
 - Option A: In 'Enter Customer Search', type the name/number of a Customer and press Enter to search. Then, either press Enter OR double-left-click the line.
 - Option B: Use your mouse to navigate and double-left-click the line of the Customer.
- If done correctly, the Customer will display in the title bar of POET as:
"[##### CUSTOMERNAME] - (F)edway (A)utomated (S)ales (T)ransactions".

A screenshot of the POET software interface with the 'Orders' tab selected. The 'Find Customer' search window is open, showing a list of customers. The search term 'test' is entered. The results are displayed in a table with columns: Acct #, Customer Name, Address, City, State, Zip, Telephone #, and Contact Name. The first three rows are highlighted in yellow.

Acct #	Customer Name	Address	City, State, Zip	Telephone #	Contact Name
3	TEST CUST #3	SNOWY LANE	NORTH POLE, AK 99999	123-111-5555	TEST CONTACT
4	TEST CUST 4	ADDRESS FIELD 3	CITY FIELD 4, NJ 07109	123-111-1111	CONTACT FIELD 8
5	TEST CUST 5 AAAA	5333 CCCCCC	522 DDDDDD, NJ 99999	888-222-2222	FFFFFFF
1	TEST CUSTOMER 1 X	ADDRESS AA X	MT LAUREL, NJ 07032	999-999-9999	Demo TC2
2	Test Customer 2	ADDRESS LINE1	NEW CITY, ST 07001	973-624-6444	PRIMARY CONTACT

Entering an Order:

- After a Customer is set Active, the **Work With->Orders** section will already be open. (If not, click the **Work With** tab, and then click **Orders**.)
- Click **New Order** to open a blank Order Pad, **New Order from History** to open an Order Pad with the Customer's history, or **New Order into PW** to open an Order Pad with the Customer's history with PW Instructions prefilled on the Header.



- The Order Header will open.
- Click **Close (F4)** on the Header.
- The Order Pad will open.
- The order tab will state **"Order[#####]"**, where ##### is the customer number.

Find Customer Order[3] x

<Enter Instructions Alpha>

Name	Value
ACCT #	3
CUSTOMER NAME	TEST CUST #3
ADDRESS	SNOWY LANE
CITY, STATE, ZIP	NORTH POLE, AK 99999
CONTACT NAME	TEST CONTACT
PERMANENT INSTRUCTIONS	
TERMS CODE	NET 30
DIVISION	North Jersey
*Instructions Alpha	
*Company	JERSEY NATIONAL/CAPITOL WINE
*Public Warehouse Release	No
*Order Code	Normal
*Instruction Code 1	None
*Instruction Code 2	None
*Instruction Code 3	None
CURRENT BILLING DATE	08/03/16
BILL & HOLD DATE	08/03/16
*Future Bill Date	08/03/16
*Purchase Order #	
*On COD?	No

- To perform a search using:
 - New Order from History**, start typing a product name. The Order Pad will adjust and display items that are a part of the search term. Then, use the up and down arrow to locate the product and enter '1' for 1 Case or '.1' for 1 Bottle. Press **[ESC]** to return to your Order Pad to display all items.

Find Customer Order[3] x

<Enter Order Quantity>

Item #	Size	Pack	Description	*	Inv	Qty	
116700	Bt 50 ML	10	GREY GOOSE VODKA 12PK		299	1	Bt
116720	Bt 200 ML	12	GREY GOOSE VODKA 80	*	1141		
116790	Bt 375 ML	12	GREY GOOSE VODKA 80		1020		
116770	Bt 750 ML	12	GREY GOOSE VODKA 80		3324		
116750	Bt 1 LT	6	GREY GOOSE VODKA 80	*	7276	1	C
116760	Bt 1.75LT	6	GREY GOOSE VODKA 80		7813		

Total: \$278.12 | Cases: 1 | Bottles: 1 | RIPs: \$0.00 | Discounts: \$0.00 | Lines: 2

Product Details

Name	THIS MONTH (Pricing/RIPs/Discounts)	Name	NEXT MONTH (Pricing/RIPs/Discounts)
Bottle Prices	1B/\$63.34 1C/\$58.09 3C/\$49.09	Bottle Prices	
Case Prices	1C/\$348.54 3C/\$294.54	Case Prices	
TM RIP1	GREY GOOSE 80 1.75L 5C/\$75 15C/\$350 25C/\$750	NM RIP1	
TM RIP2		NM RIP2	
TM RIP3		NM RIP3	
TM Disc LV1	1 \$27.00	NM Disc LV1	
TM Disc LV2	3 \$81.00	NM Disc LV2	
TM Disc LV3		NM Disc LV3	

goose

- New Order**, enter a product number and press Enter. Then, enter '1' for 1 Case or '.1' for 1 Bottle. Repeat.

Find Customer Order[3] x

<Enter Item Number>

Item #	Size	Pack	Description	*	Inv	Qty	
116750	Bt 1 LT	6	GREY GOOSE VODKA 80	*	7276	1	C

- Once done with your Order, click **Confirm (Ctrl+F7)**.
- The order tab will state **"Order[#####] - **Confirmation Mode**"**.
- The Order Confirmation totals will appear at the bottom of the screen.

Item #	Size	Pack	Description	*	Inv	Qty	BO	ALC	PW	Co	PWI	BOQ	Price	Full List	Post Off	Botl Cost	Ext Amt	Curr Disc	Aggr	Next Qty	Next Disc	RIP Amt
116700	Bt 50 ML	10	GREY GOOSE VODKA 12PK		299	1 Bt				07			43.58	430.80		43.58	43.58		0.10	1.00	12.00	
116770	Bt 750 ML	12	GREY GOOSE VODKA 80		3324	5 C				07			337.08	377.88		28.09	1685.40	40.80				75.00

Total: \$1728.98 | Cases: 5 | Bottles: 1 | RPs: \$75.00 | Discounts: \$204.00 | Lines: 2

- After the order is verified, click **Close (F4)**.

- Check 'Ready to Send' and Click Yes.

Close Order[3]

Do you want to save changes made to this Order?

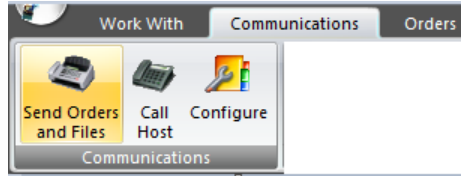
☐ Remove Zero Quantity Line Items

☒ Ready to Send

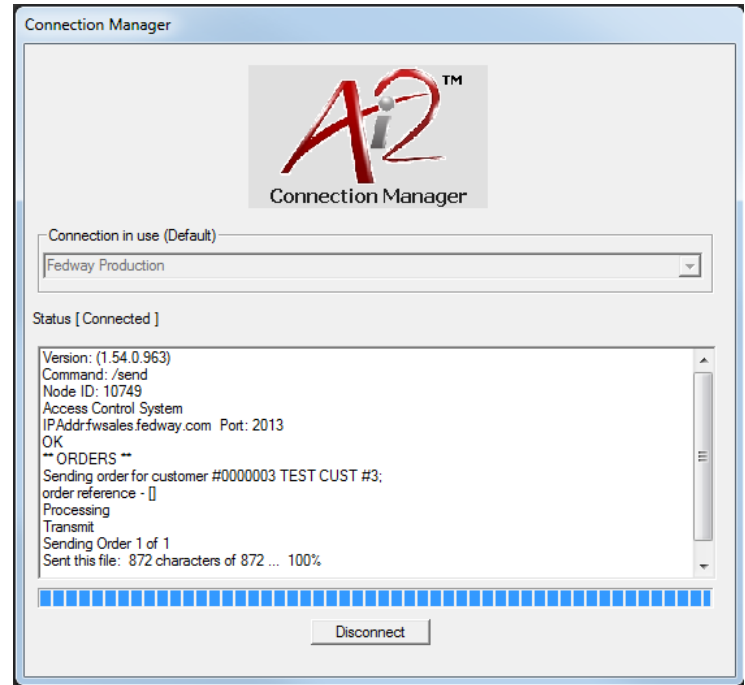
Yes No Cancel

Sending an Order:

- Click the **Communications** tab.
- Click **Send Orders and Files**.

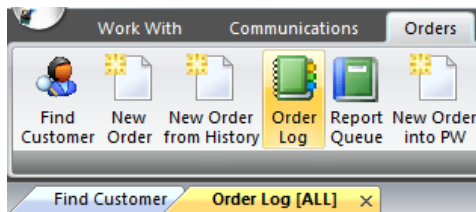


- The Ai2 Connection Manager will open to send all 'R' status orders, and close after they've been sent.
- After a minute, click **Communications->Call Host**.
- The Ai2 Connection Manager will open to receive any Printbacks, and close after they've been received.



Verifying an Order:

- Click the **Work With** tab, then click **Orders**.
- Click **Order Log**.



- The Order Log will open, displaying all orders.
- Locate the order that was sent and verify that it has a 'P' in the S/T column.
- Highlight the line and click **Reports (F2)** to view the Printback.

Work With

Communications

Orders

Find Customer

New Order

New Order from History

Order Log

Report Queue

New Order into PW

PW Order Guide

A/R Detail

Find Item

Retail Incentive Programs

RIPs for this Item

Deals for this Item

All History for Item

Show All (F3)

Delete (F9)

Reports (F2)

Close (F4)

Active Windows ▾ Style ▾

Find Customer

Order Log [3] ×

Acct #	Customer Name	Cases	Bottles	Total \$	S/T	Acct#	Co	PW	Ship-To	OC	IC1	IC2	IC3	Bill Date	Bill Hold	Inv Date	Message	Status	Last Update	Lines	PO #
3	TEST CUST #3		2	\$68.76	P	637668	07							08/03/16	08/03/16	08/03/16	Some Items Have Failed	Viewed	8/2/2016 10:30:43 AM	2	
3	TEST CUST #3	1		\$79.99	P	626476	07							07/29/16	07/29/16	07/29/16	Regular Order	Viewed	7/29/2016 7:42:39 AM	1	
3	TEST CUST #3	2		\$71.22	P	612782	07							07/21/16	07/21/16	07/21/16	Regular Order	Viewed	7/20/2016 4:52:24 PM	2	
3	TEST CUST #3	2		\$71.22	P	612777	07							07/21/16	07/21/16	07/21/16	ENTIRE ORDER HAS FAILED	Viewed	7/20/2016 4:43:04 PM	2	
3	TEST CUST #3	3		\$133.89	P	612156	07							07/21/16	07/21/16	07/21/16	ENTIRE ORDER HAS FAILED	Viewed	7/20/2016 10:03:46 AM	3	
3	TEST CUST #3	1		\$7.84	I		07							07/14/16	07/14/16	06/24/16		New	7/13/2016 4:06:26 PM	1	

- Click **Close (F4)** to close the Printback.
- Click **Close (F4)** to close the Order Log.