

POET Everyday Instructions

System Overview

The POET system is used to manage instructions about - every morning, set an active customer, entering, sending and verifying an order within Fedway. Below are detailed instructions on how to perform essential tasks using the POET system.

Every Morning

- **Steps:**
 1. Open POET.
 2. Click the **Communications** tab.
 3. Click **Call Host**.
 4. The **Ai2 Connection Manager** will open, download and process updates, and close when completed.

Setting an Active Customer

- **Steps:**
 1. Click the **Work With** tab.
 2. Click **Orders**.

 3. To set a Customer as Active:
 - **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.
 4. If done correctly, the Customer will display in the title bar of POET as:
[##### CUSTOMERNAME] - (F)edway (A)utomated (S)ales (T)ransactions

Entering an Order

- **Steps:**

1. 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**.)

2. 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.

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

7. 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.

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

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

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

12. Check 'Ready to Send' and Click Yes.

Sending an Order

- **Steps:**

1. Click the **Communications** tab.
2. Click **Send Orders and Files**.

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

Verifying an Order

- **Steps:**

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

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

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