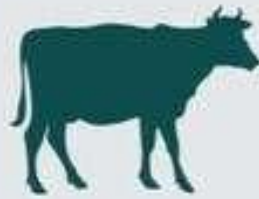
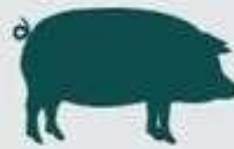




CHICKEN



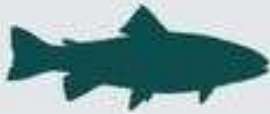
BEEF



PORK



SAUSAGE



SEAFOOD



DUCK



TURKEY



SPECIALTY



ETHNIC



ORGANIC / NAE



VANGUARD FOODS



DRY



Price Book Printing Portal Manual



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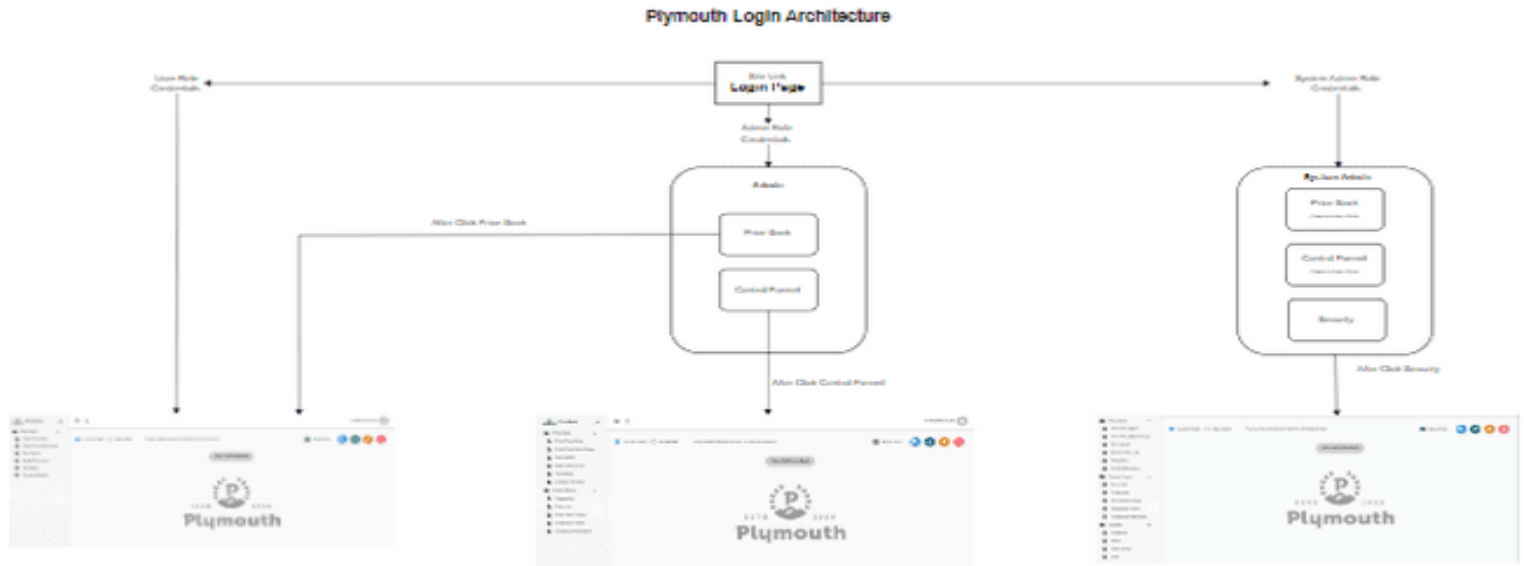


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Login Architecture



In the context of a project, the terms **USER**, **ADMIN**, and **SYSTEM ADMIN**.

USER

A regular user typically refers to an individual who uses the system to interact with its core functionalities but has limited access to sensitive or administrative features.

Users usually don't have the ability to access system settings, manage other users, or make significant changes to the system.

ADMIN

The Admin is a higher-level role responsible for managing and maintaining the system. Admin have more control over the application and can typically access more features and tools than a regular user.

Admin can manage user accounts, including creating, editing, or deleting users, as well as assigning roles and permissions. They ensure the right users have access to the correct functionalities based on their roles.

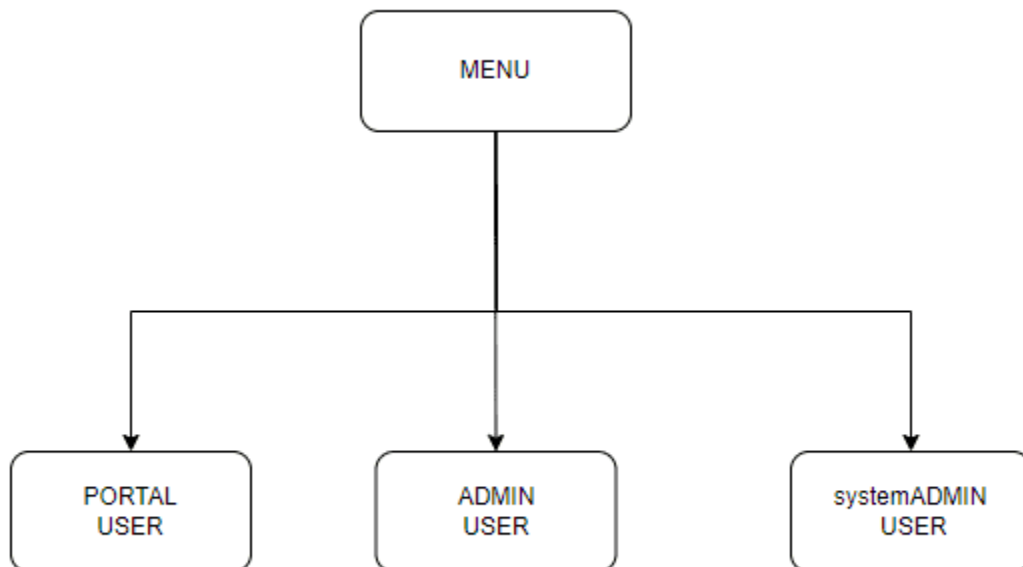
SYSTEM ADMIN

The System Admin is typically the highest level of access in a system. This role is responsible for managing the entire system, infrastructure, and its security.

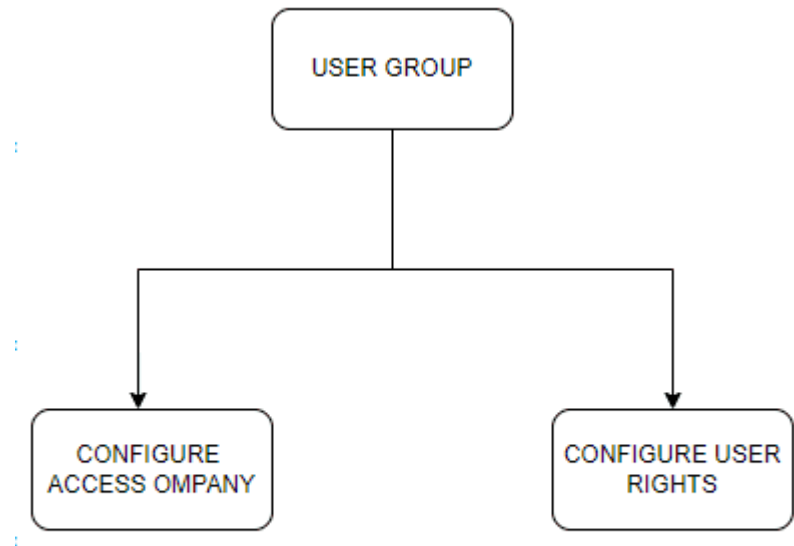
System Admin have the ability to manage all aspects of the system, including hardware, software, databases, and network configurations.

System Admin have unrestricted access to all areas of the system, including sensitive data, configuration files, and the ability to modify or override settings that affect all users, including admin and regular users.

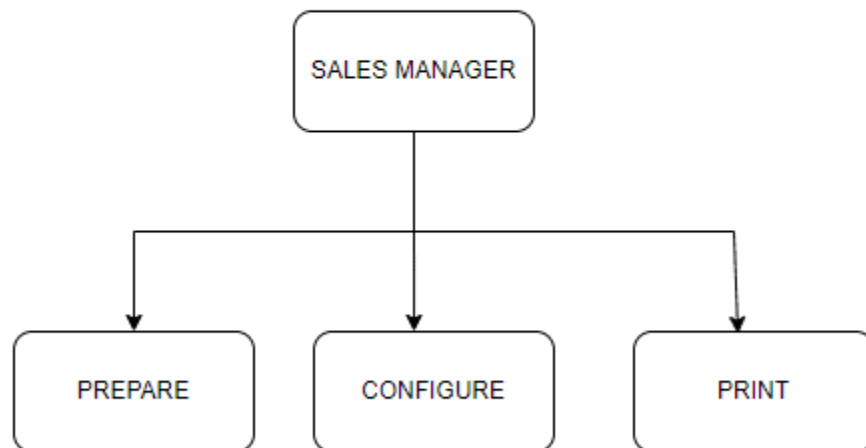
MENU



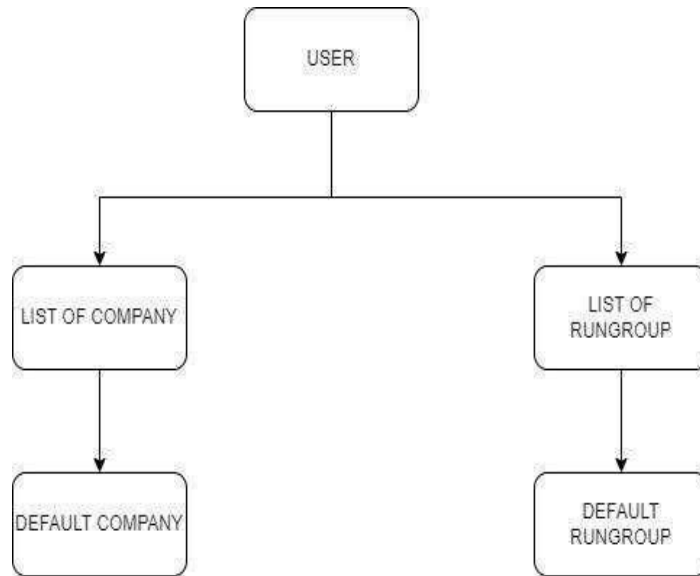
User group



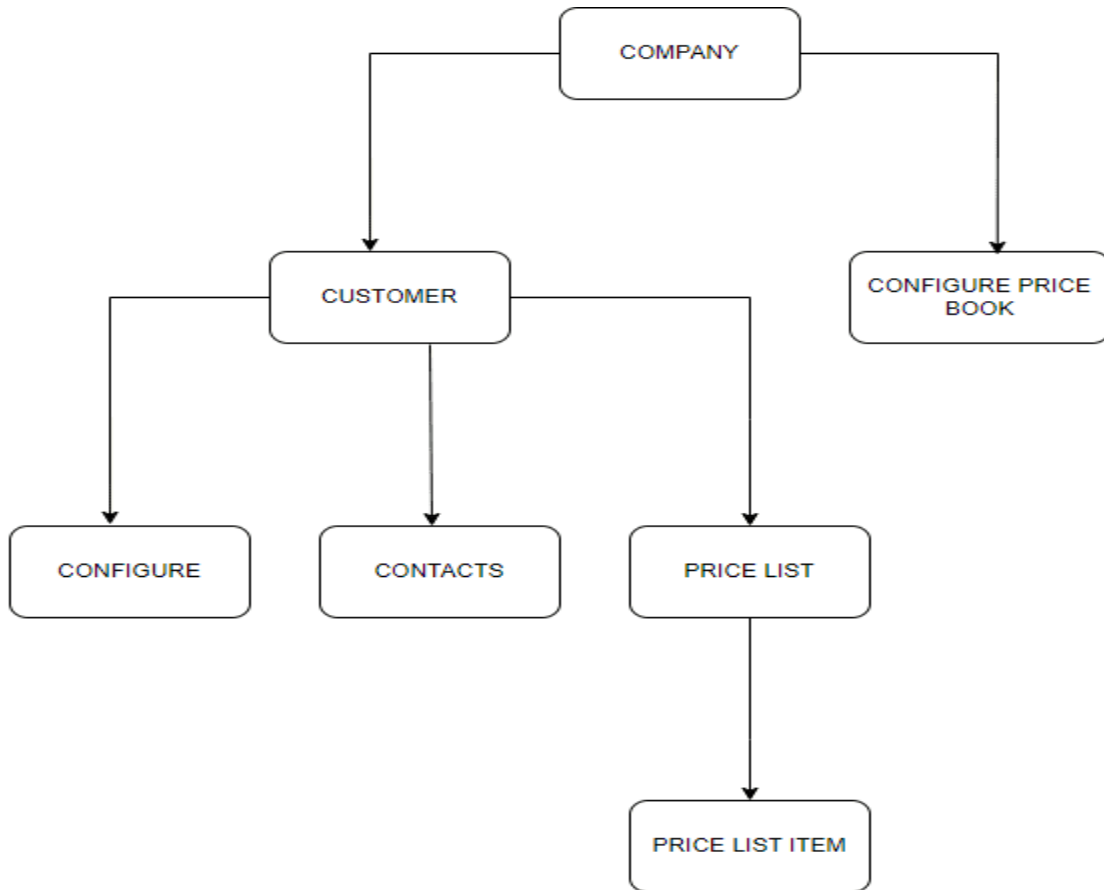
Sales Manager



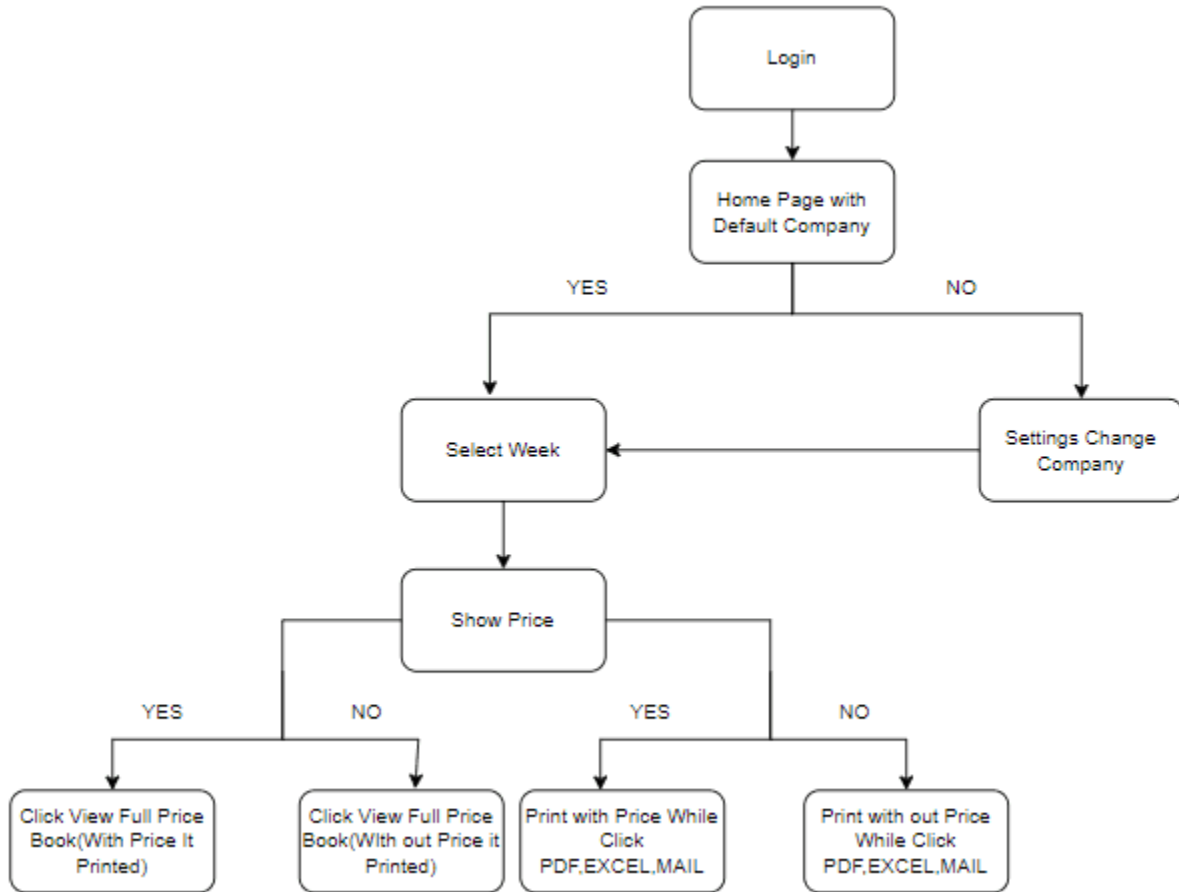
Users



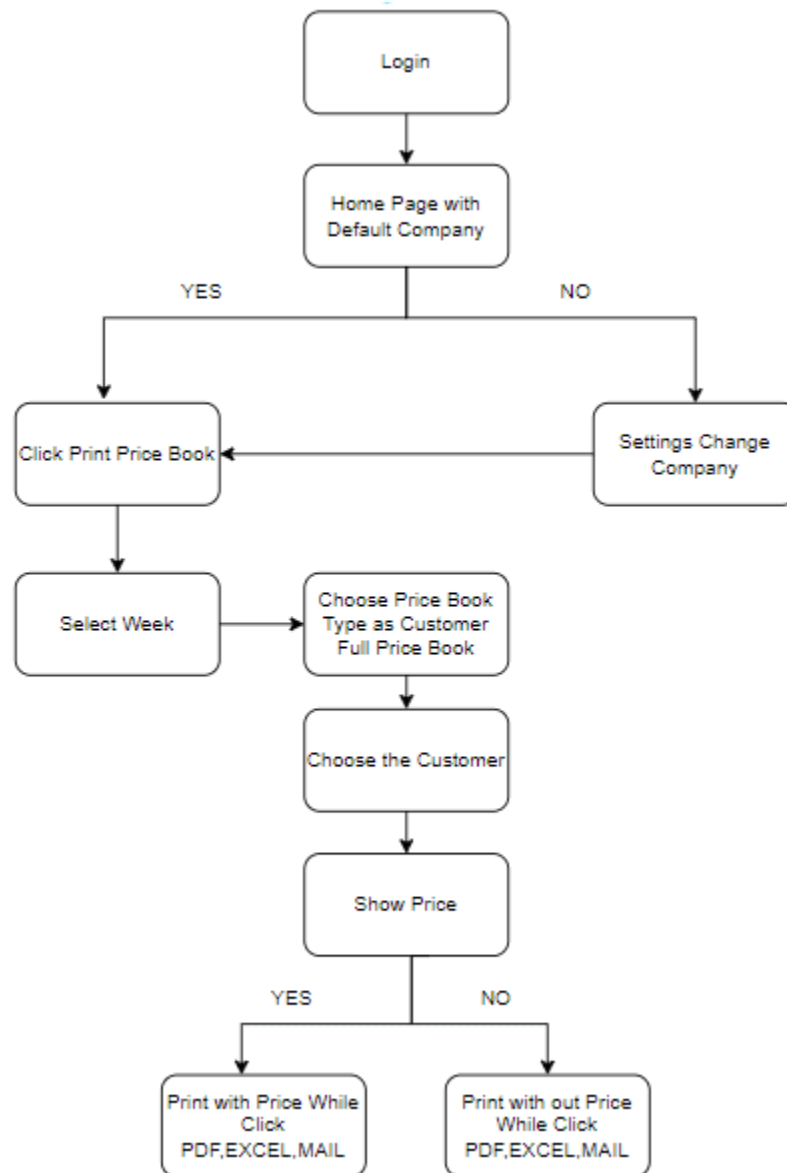
Company Configure Price Book



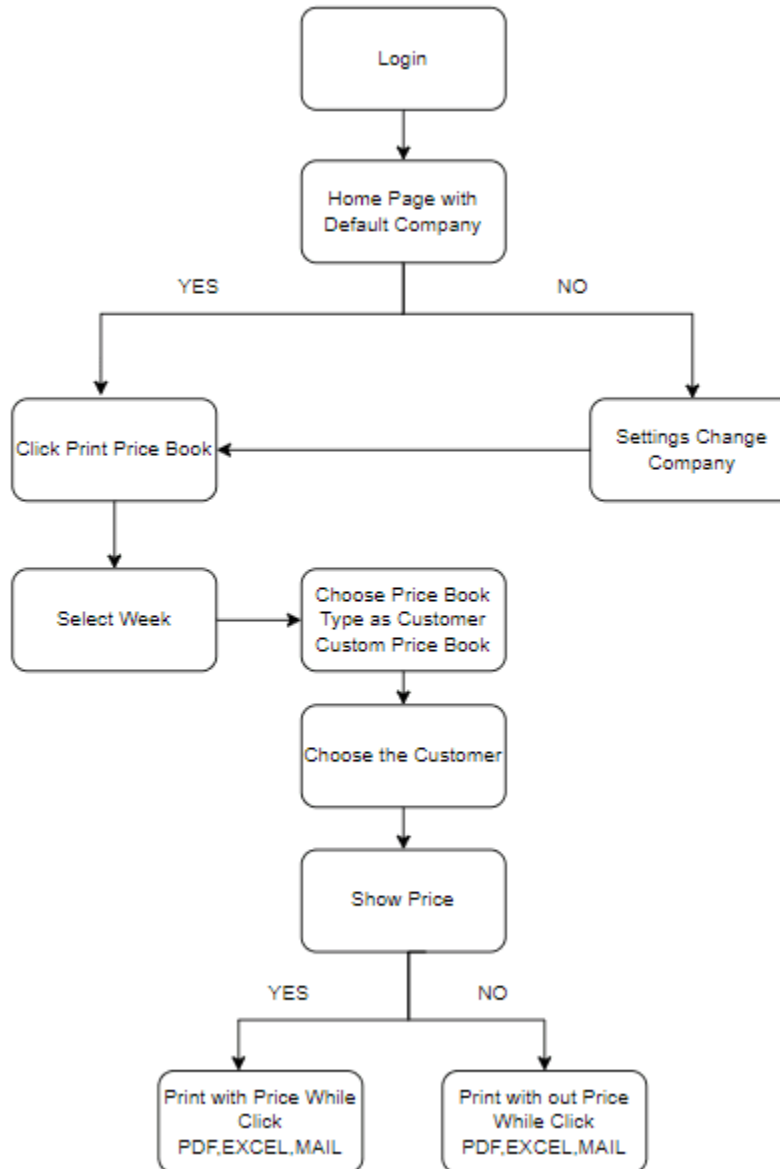
Print Price Book- Generic Full Price book



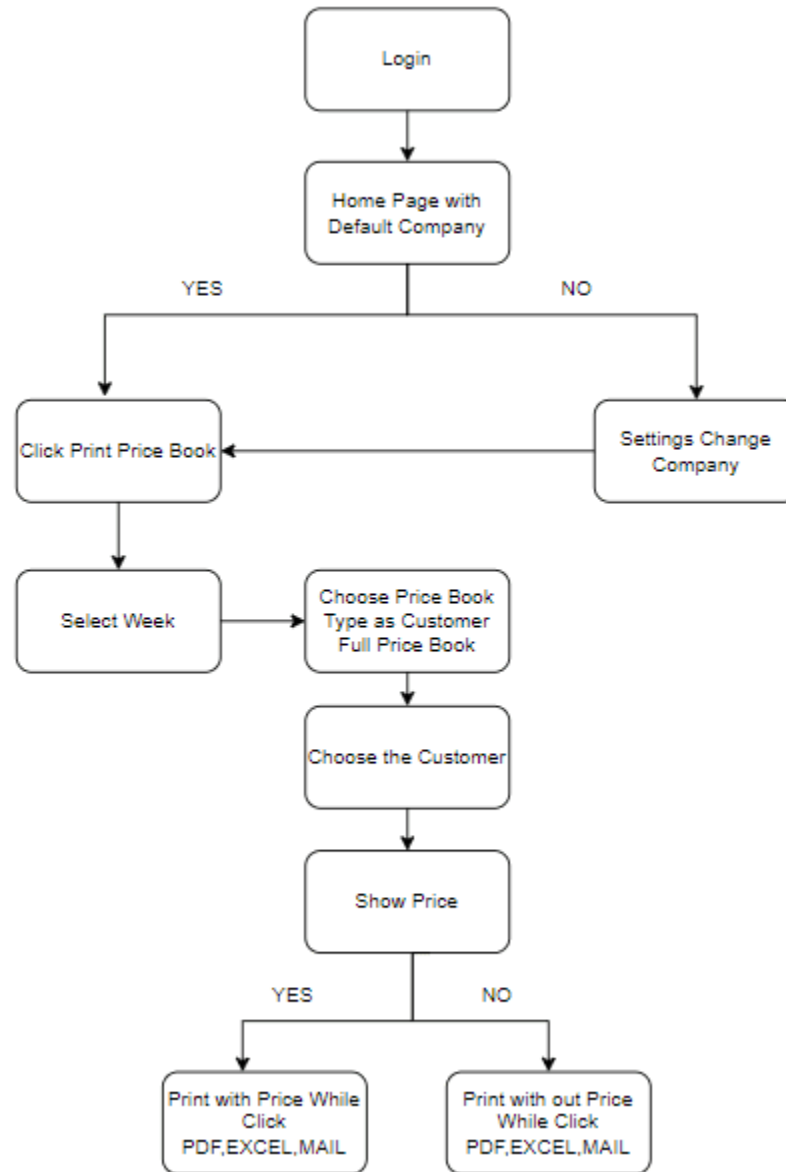
Print Price Book-Customer Price book



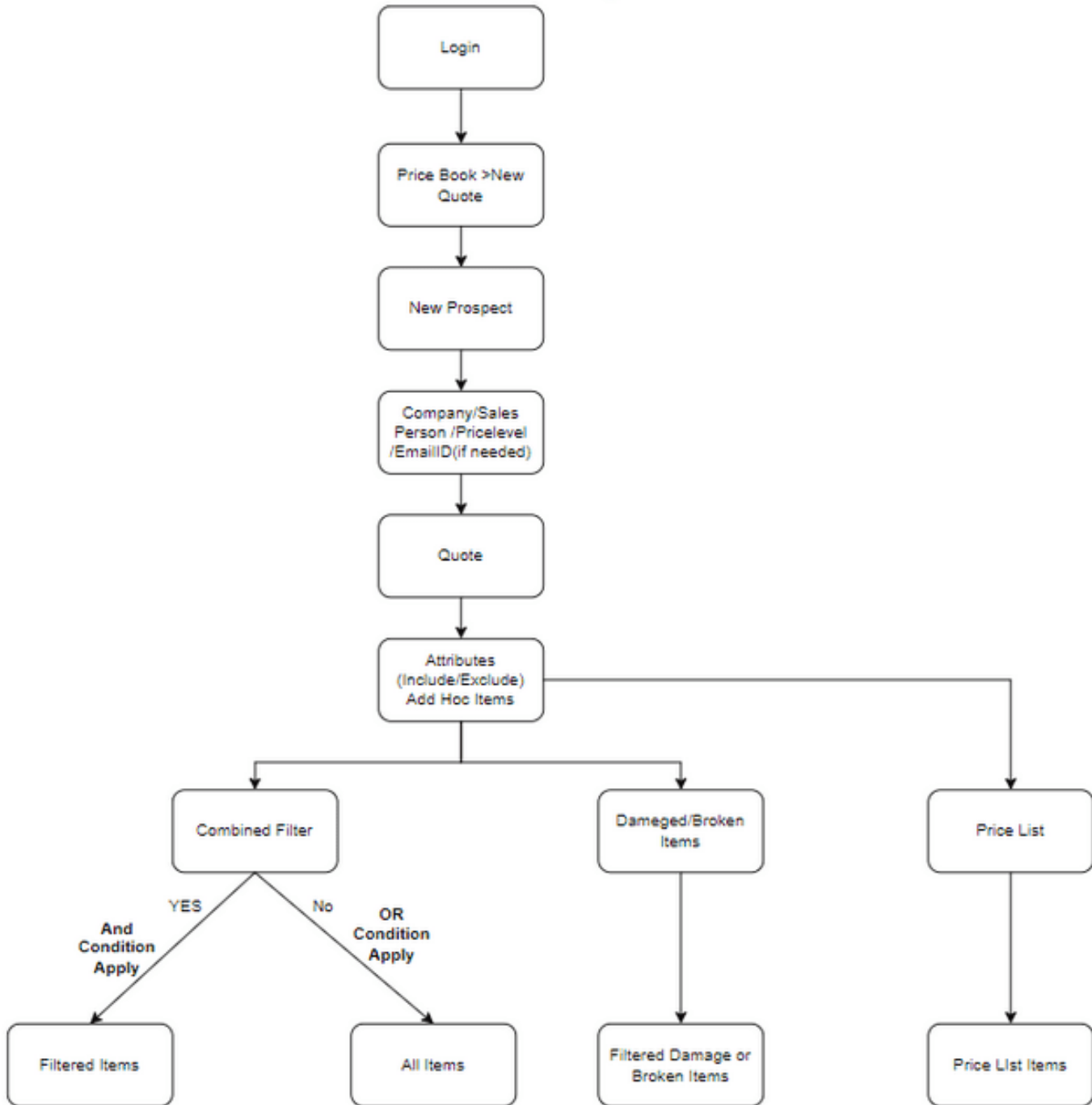
Customer Custom Price Book



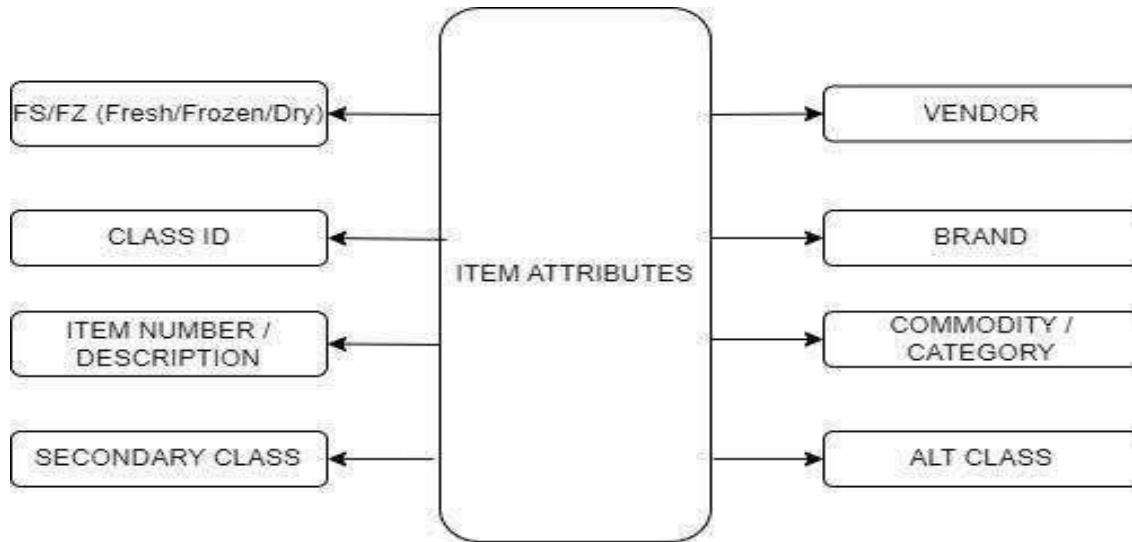
Customer Full Price Book



Quote

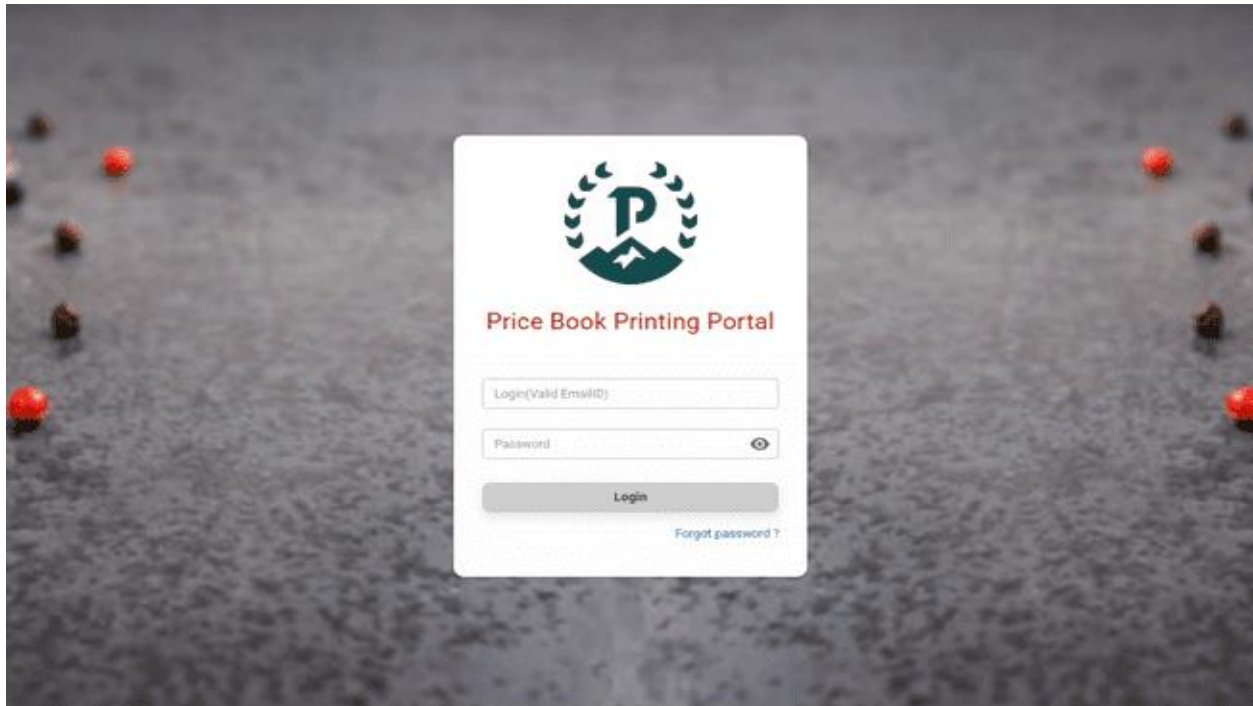


Item Attributes

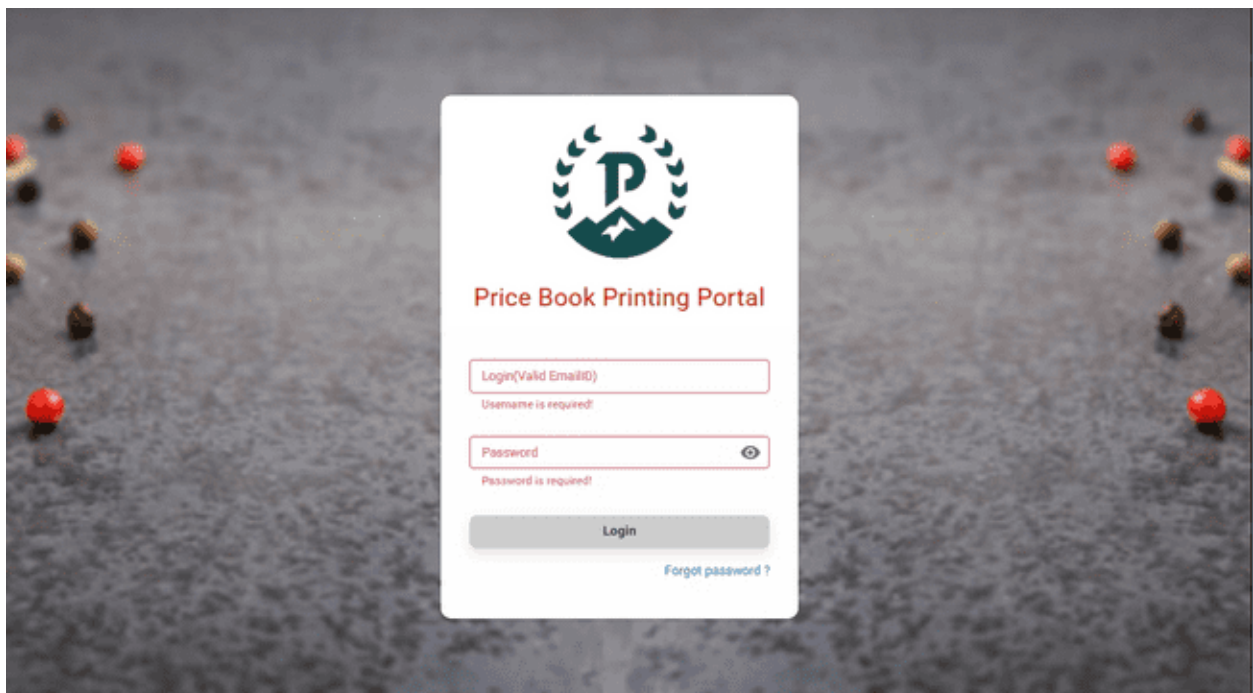


Login

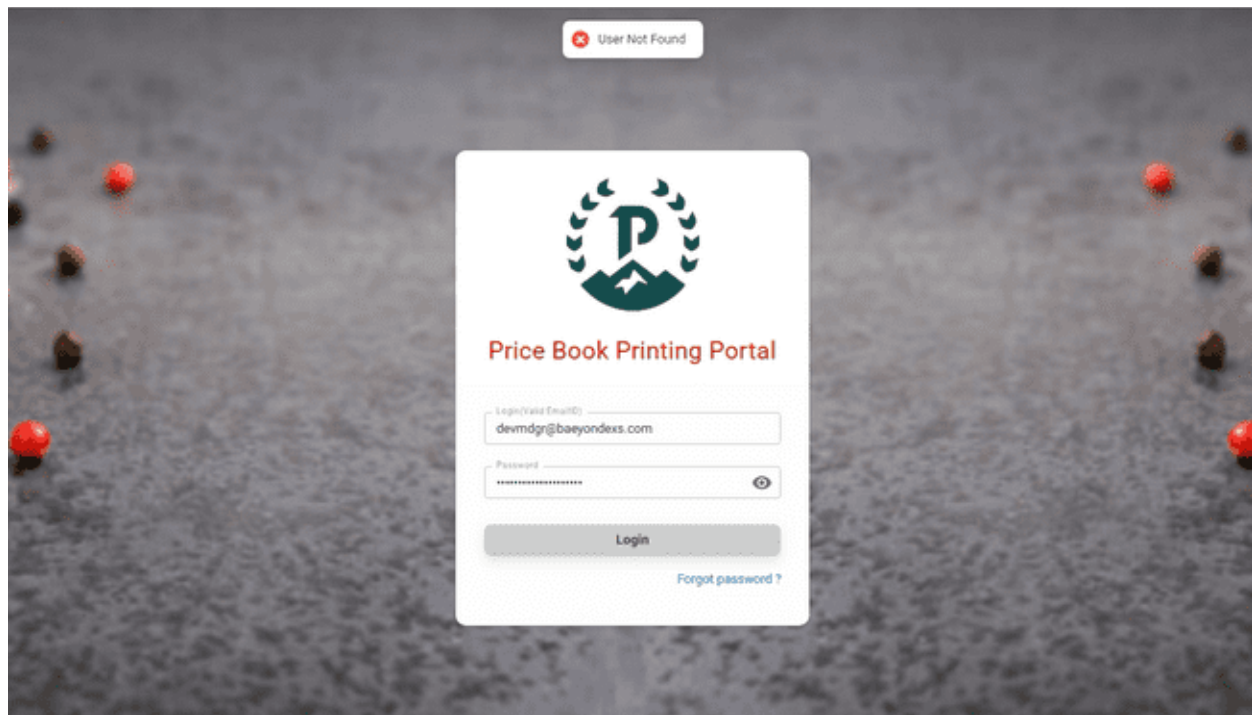
Admin Login Steps Includes Forget & Unlock Password



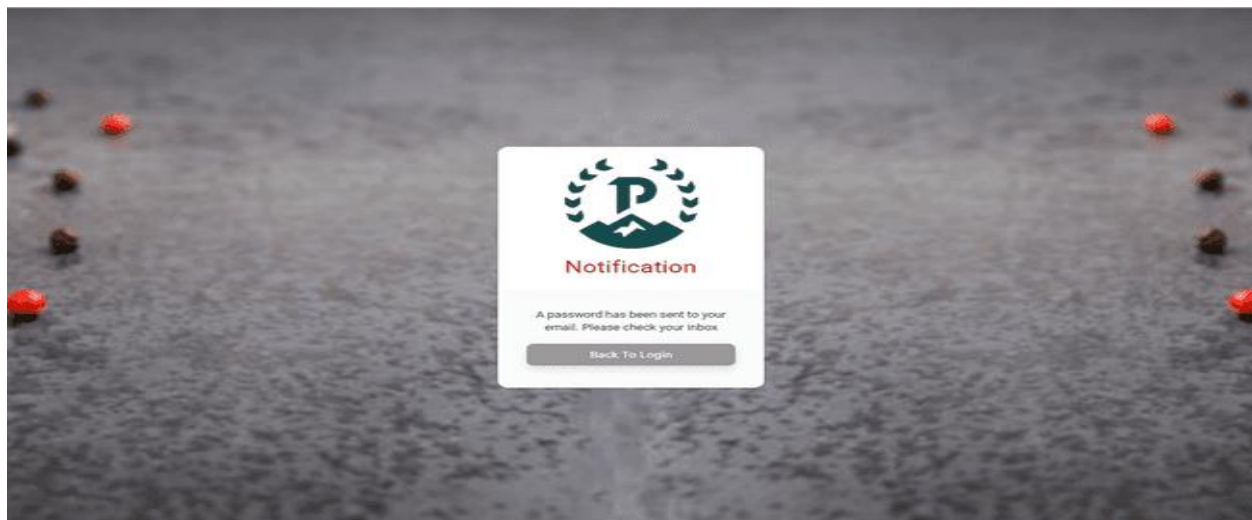
Step 1: When we click the login button without entering a username and password, the screen below will appear.



Step 2: When we enter an incorrect username or password, the screen below will appear.

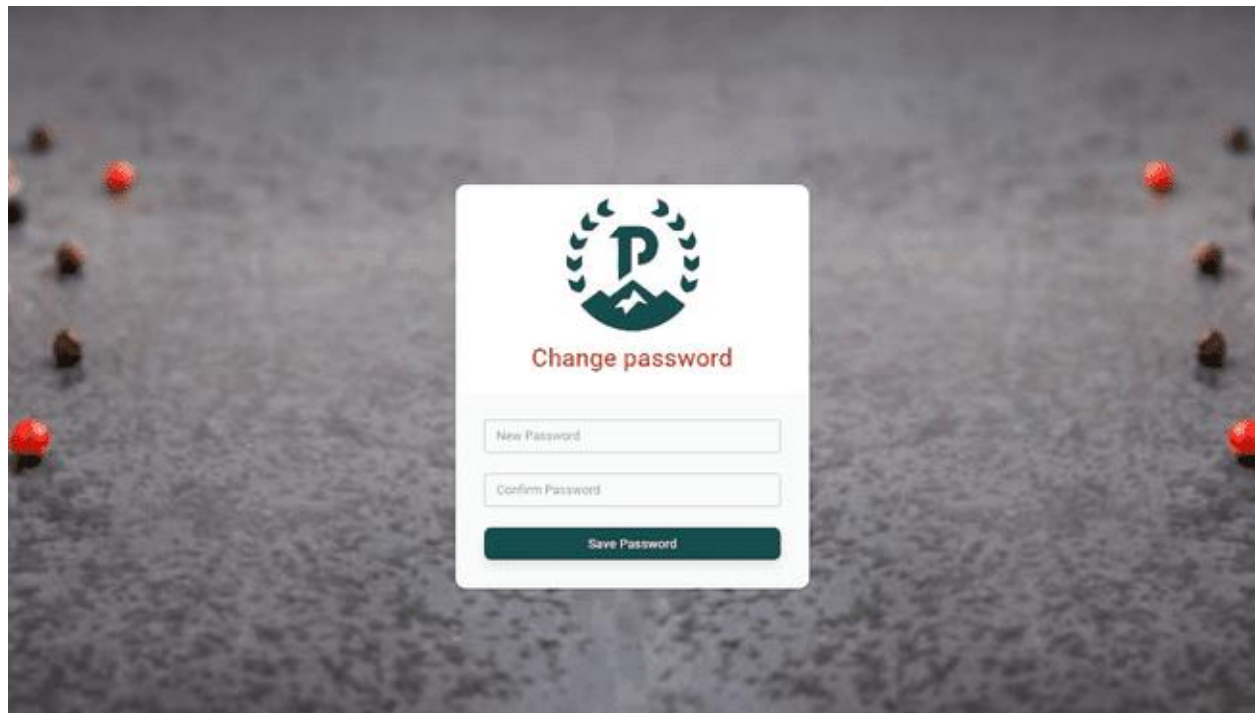


Step 3: To change the password, click on 'Forgot Password,' and the screen below will appear.

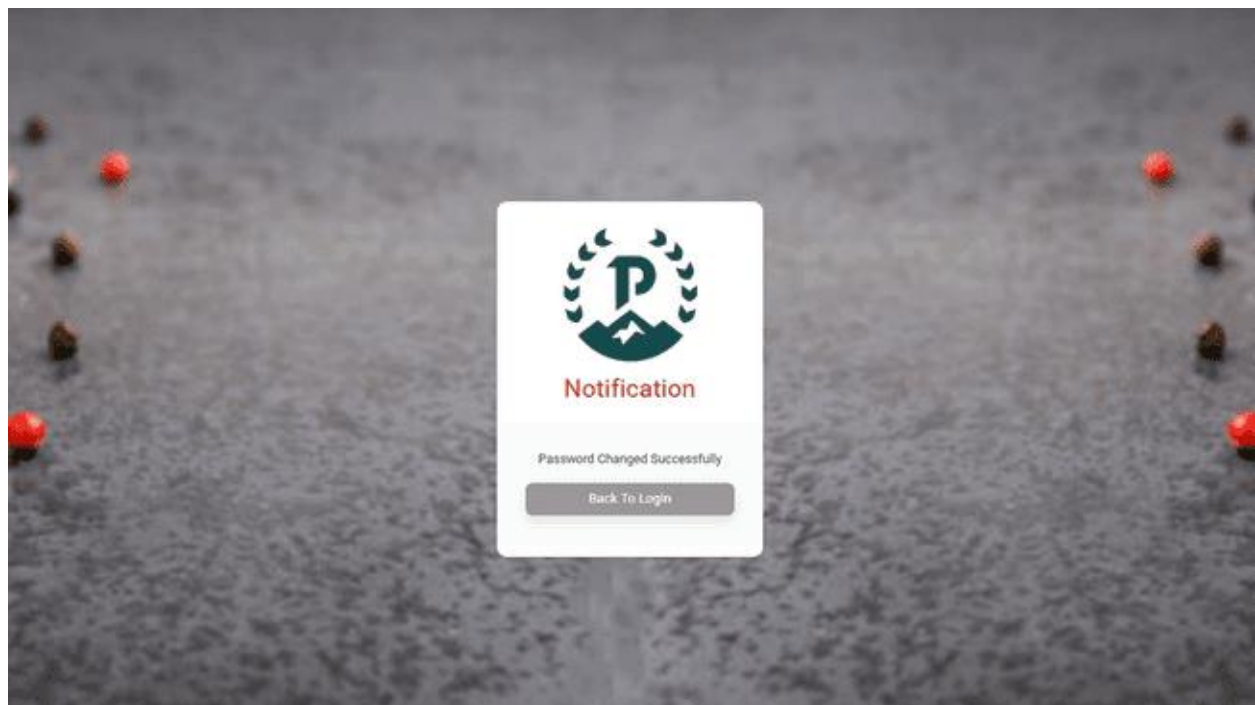


Then, click the 'Back to Login' button. A new password will be sent to the associated email. Open the email, copy the password, and paste it into the password field.

Step 4 : Here, we need to enter the new password and confirm the password.

A screenshot of a web form titled 'Change password'. The form is centered on a dark, textured background with scattered red and brown berries. The form itself is white with a green border. At the top is the Plymouth logo. Below it, the title 'Change password' is in red. There are two input fields: 'New Password' and 'Confirm Password'. At the bottom is a green button labeled 'Save Password'.

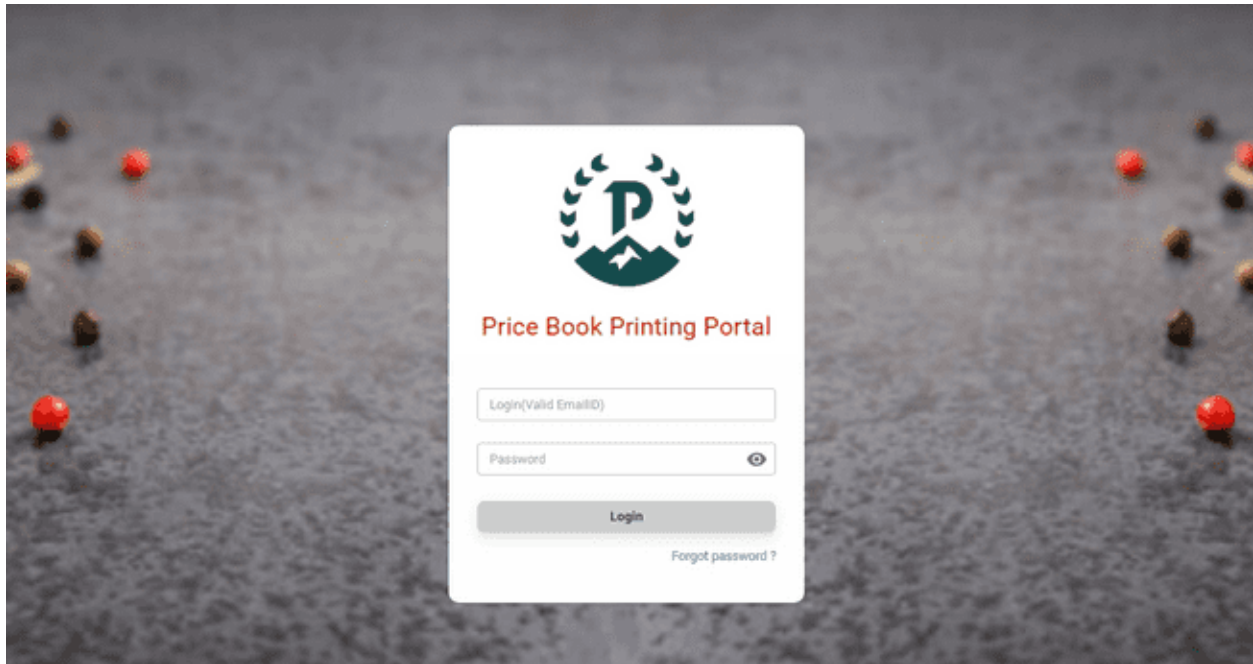
Step 5: When entering the new password and confirm password, the screen below will appear.

A screenshot of a notification screen. It features the same dark, textured background with berries as the previous screen. In the center is a white notification box with a green border. At the top is the Plymouth logo. Below it, the title 'Notification' is in red. The message 'Password Changed Successfully' is displayed in a smaller font. At the bottom is a grey button labeled 'Back To Login'.

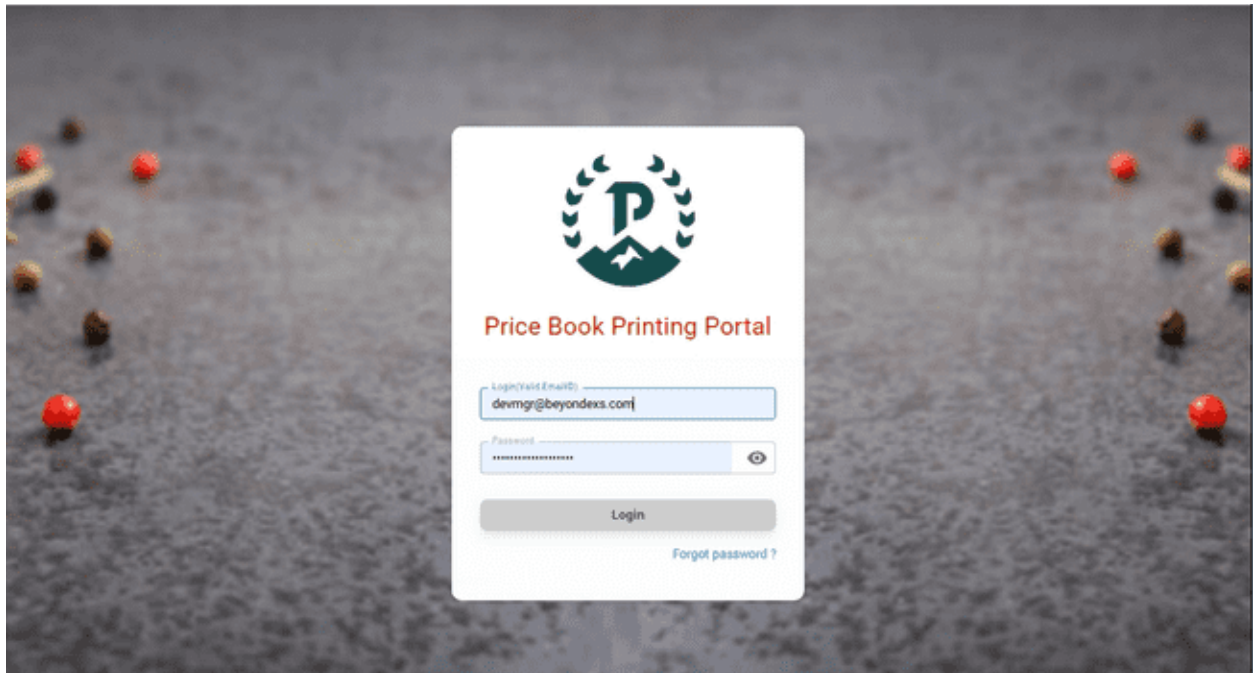
Price Book Printing Portal Manual



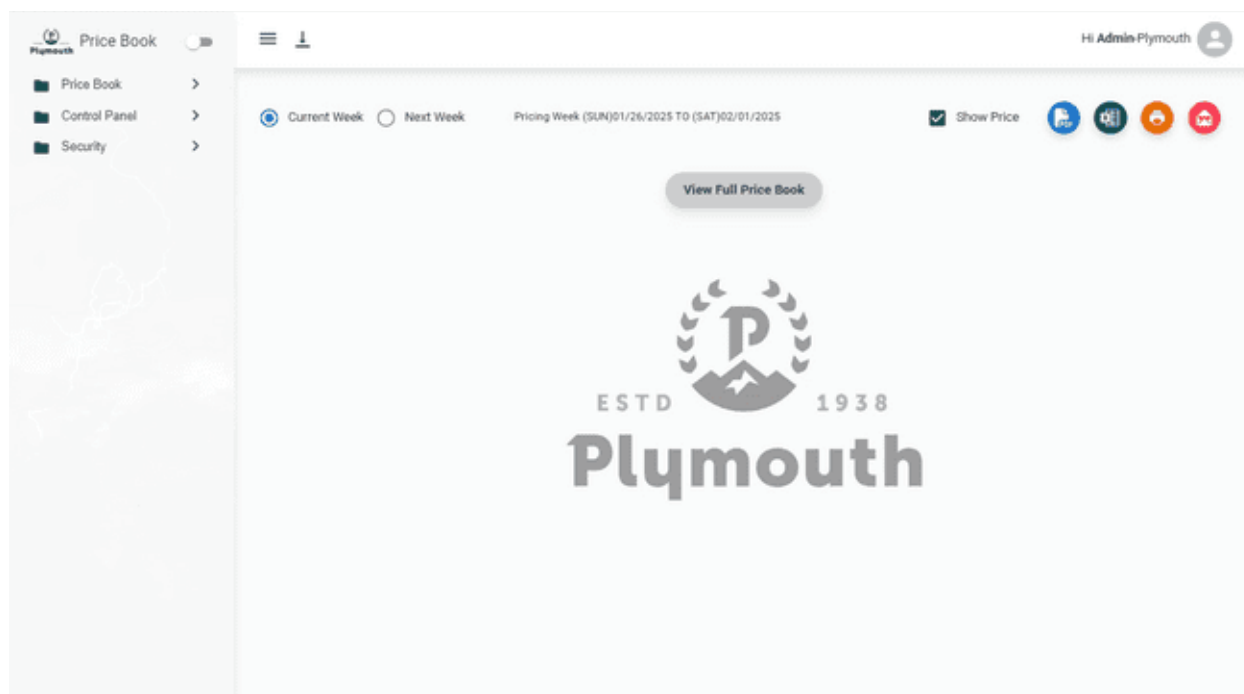
Step 6: Then, click on the 'Back to Login' button, and the screen below will appear.



Step 7: Enter the username and password, and then click the 'Login' button.

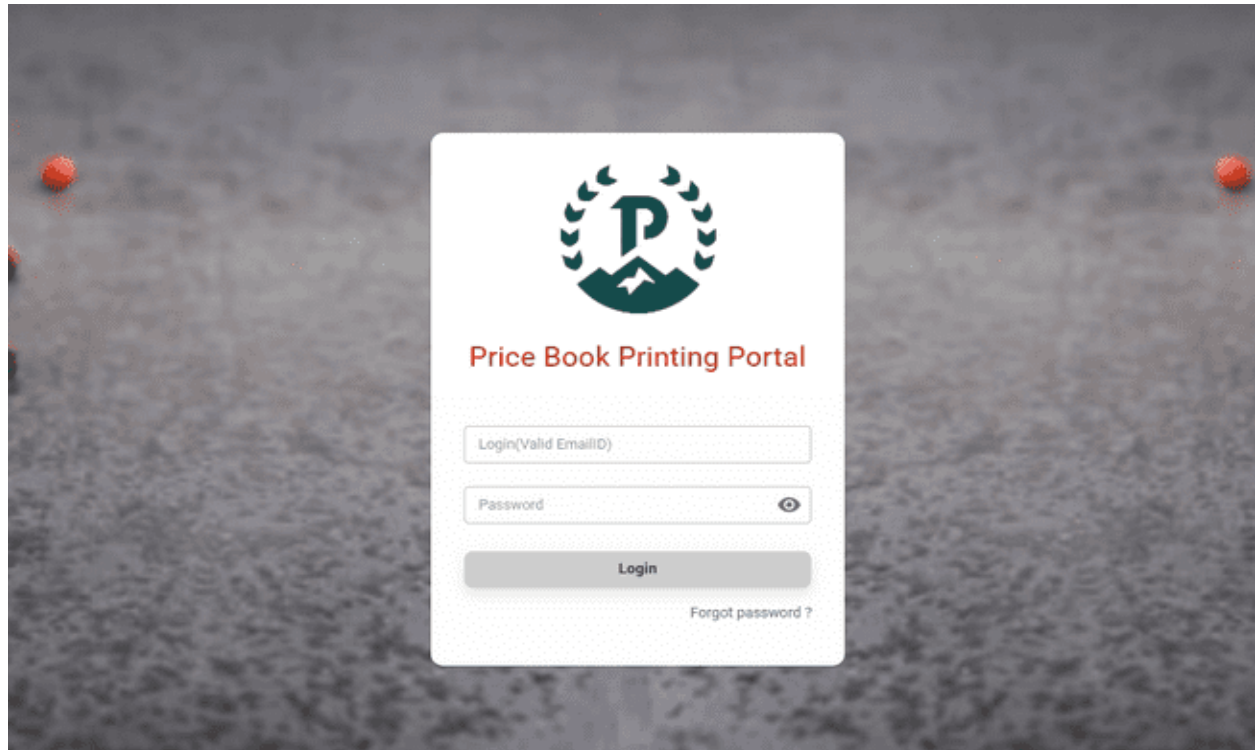


Step 8: The Plymouth home page will appear.

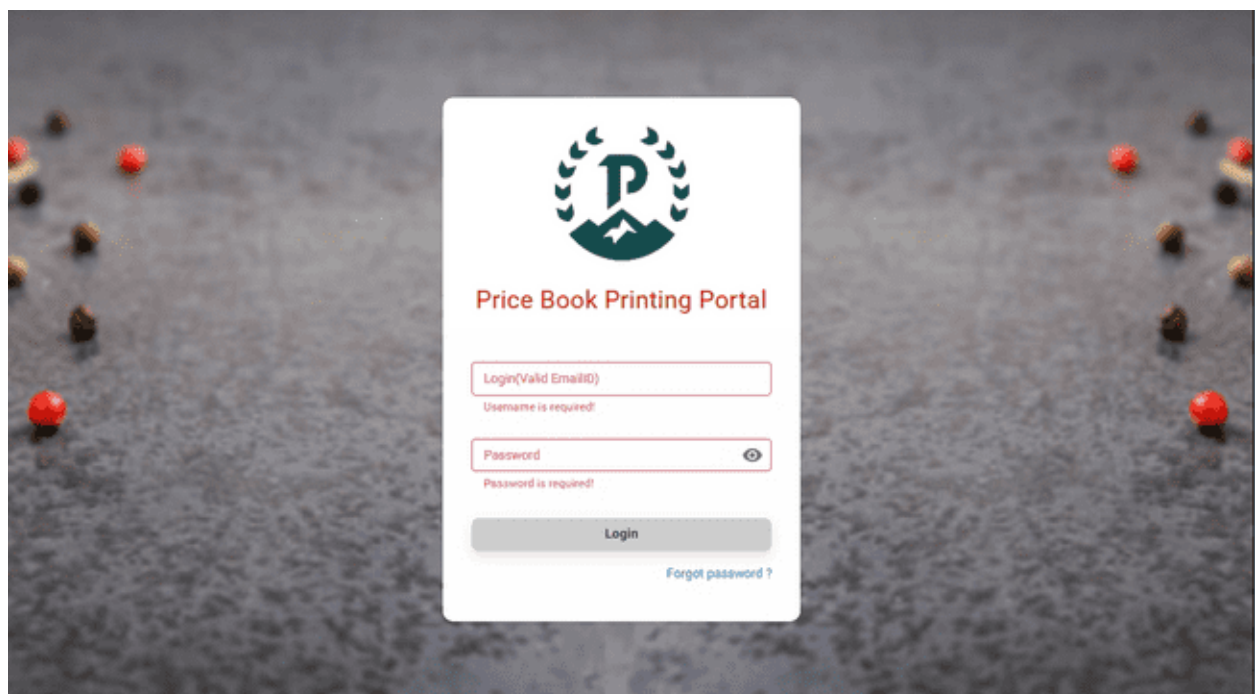


Login Page

User Login Steps Includes Forget & Unlock Password

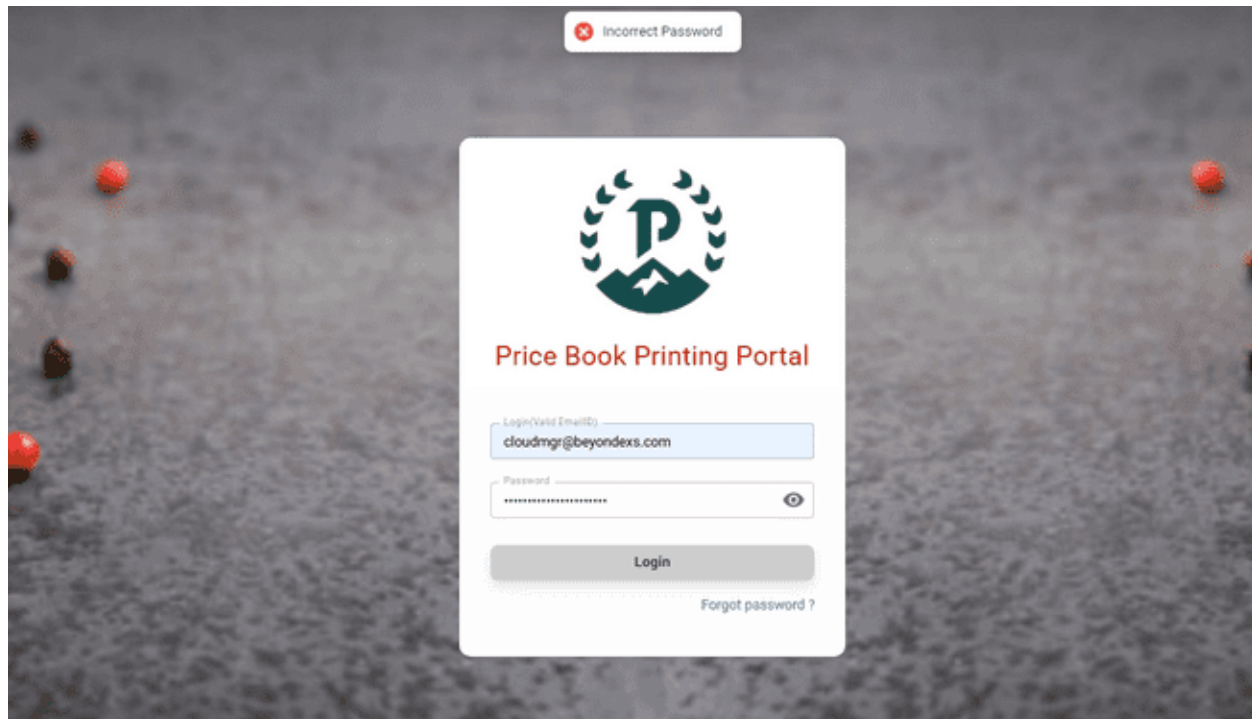


Step 1: When we click the login button without a username and password, the screen below will appear.

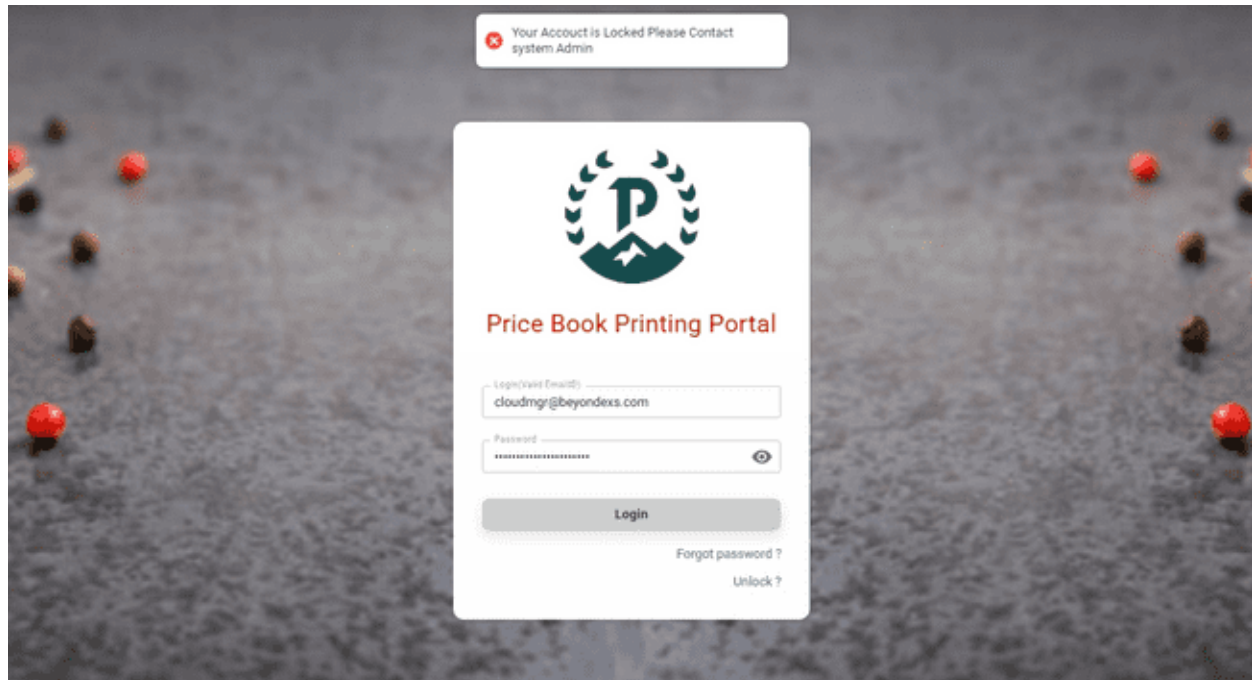


Price Book Printing Portal Manual

Step 2: When we enter the wrong password and click the login button, the screen below will appear.

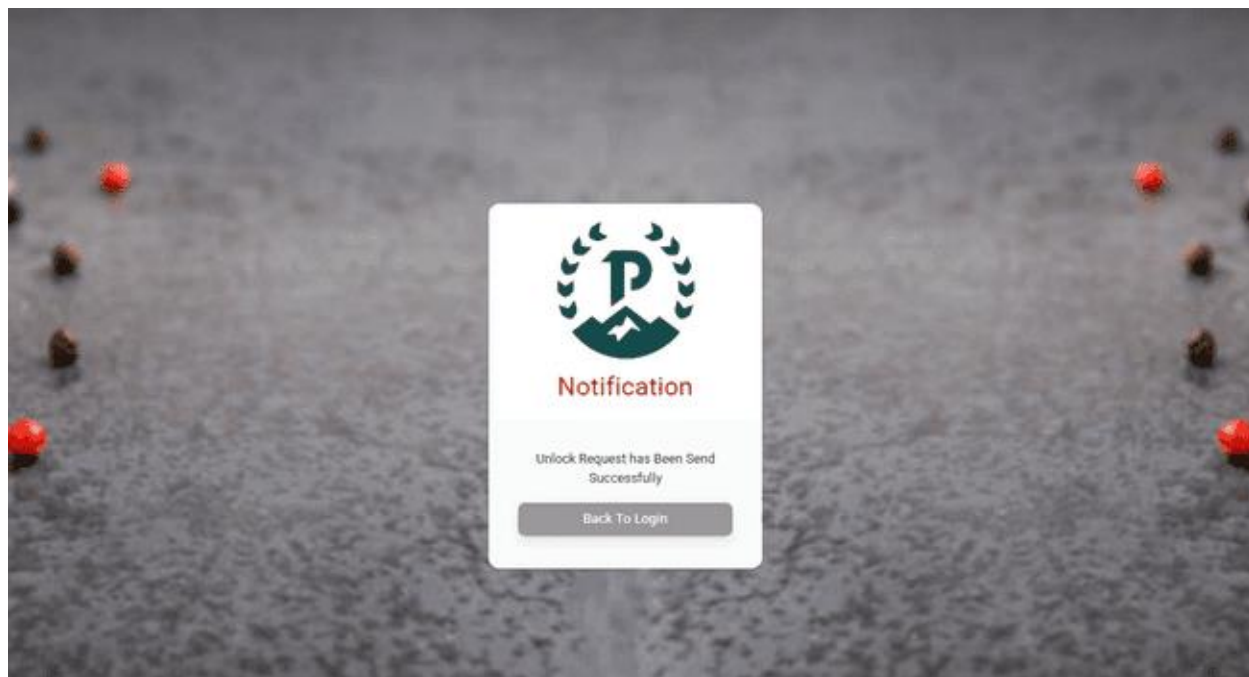


Step 3: When we enter the wrong password and click the login button three times, the screen below will appear.

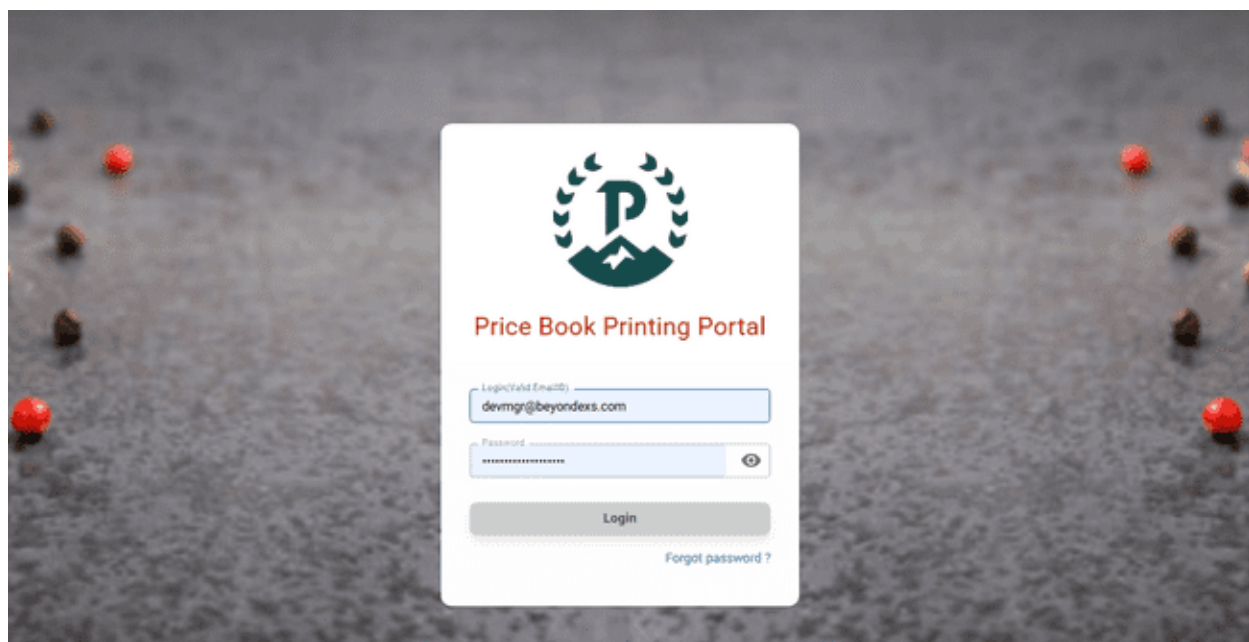


Price Book Printing Portal Manual

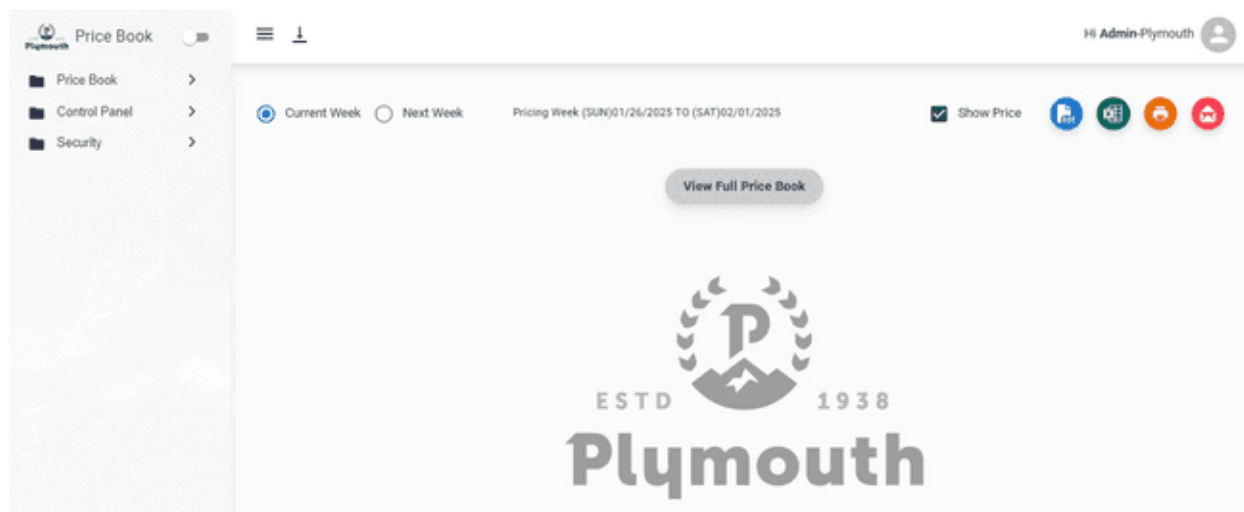
Step 4: To unlock the screen, click on the 'Unlock' option, and the screen below will appear.



Step 5: Then, log in as an admin user and click the login button.

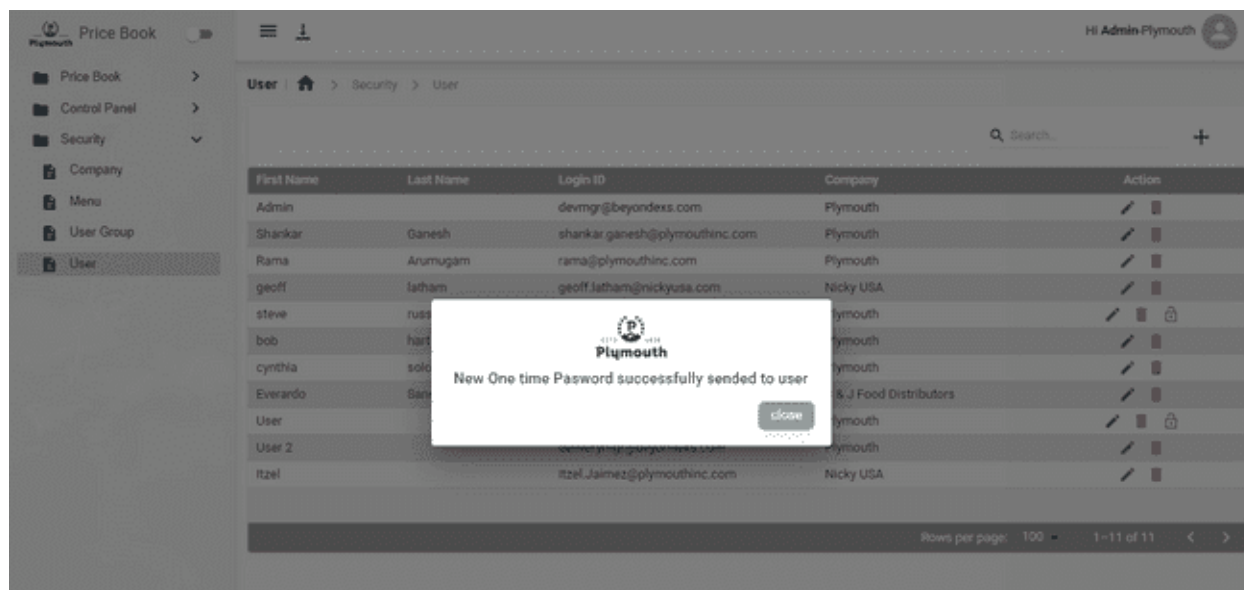


Step 6: The admin user home page will appear.

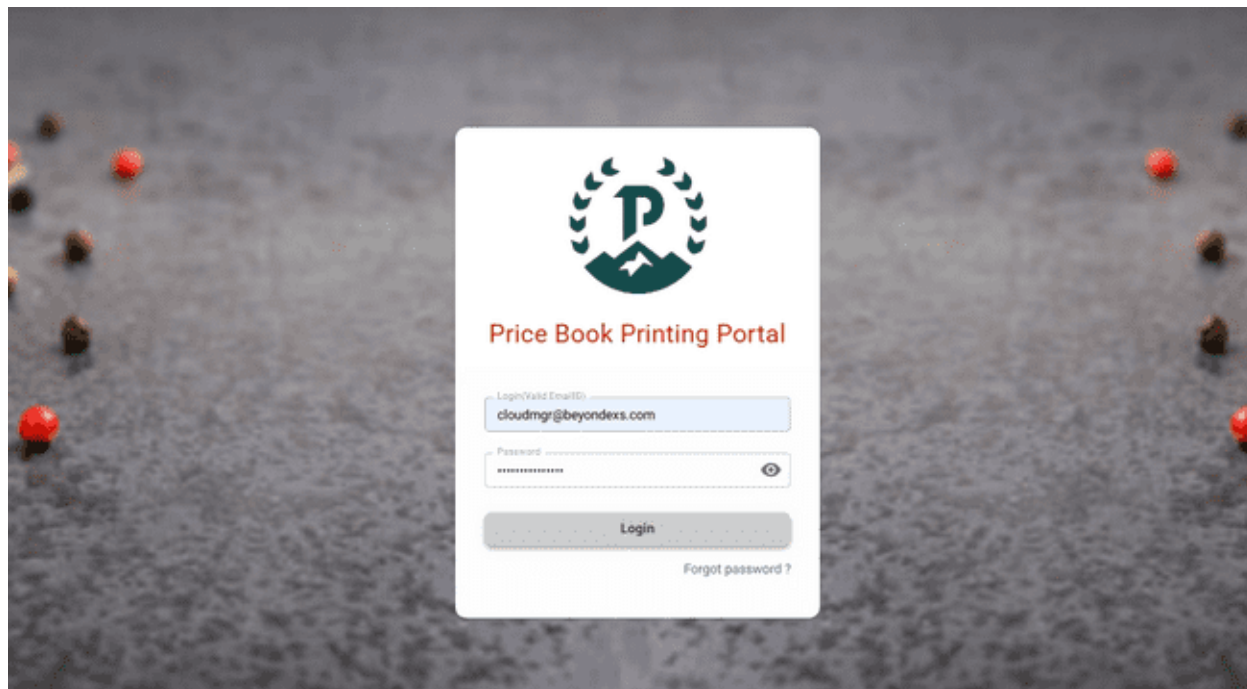


Step 7: In the menu bar, click on 'Security,' then select 'User.'

In the user screen, click on 'User List.' You will find the 'Lock' option, and when you click on it, the screen below will appear.

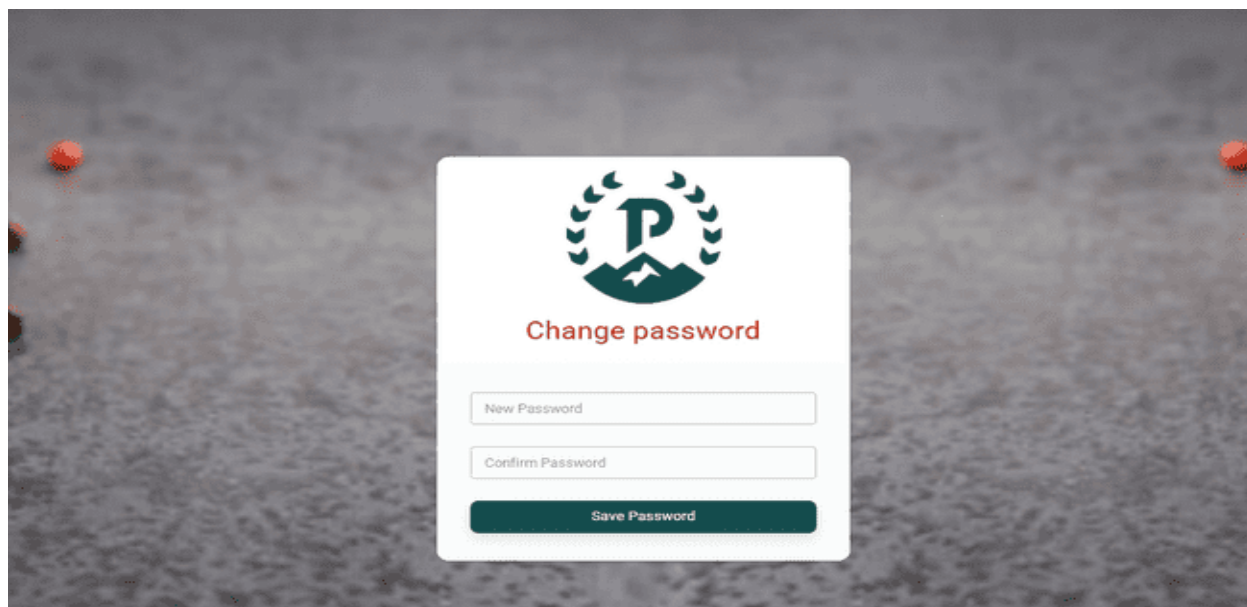


Step 8: Then, log out of the admin user. The password will be sent to the user's email address. Open the email, copy the password, and paste it into the password field.



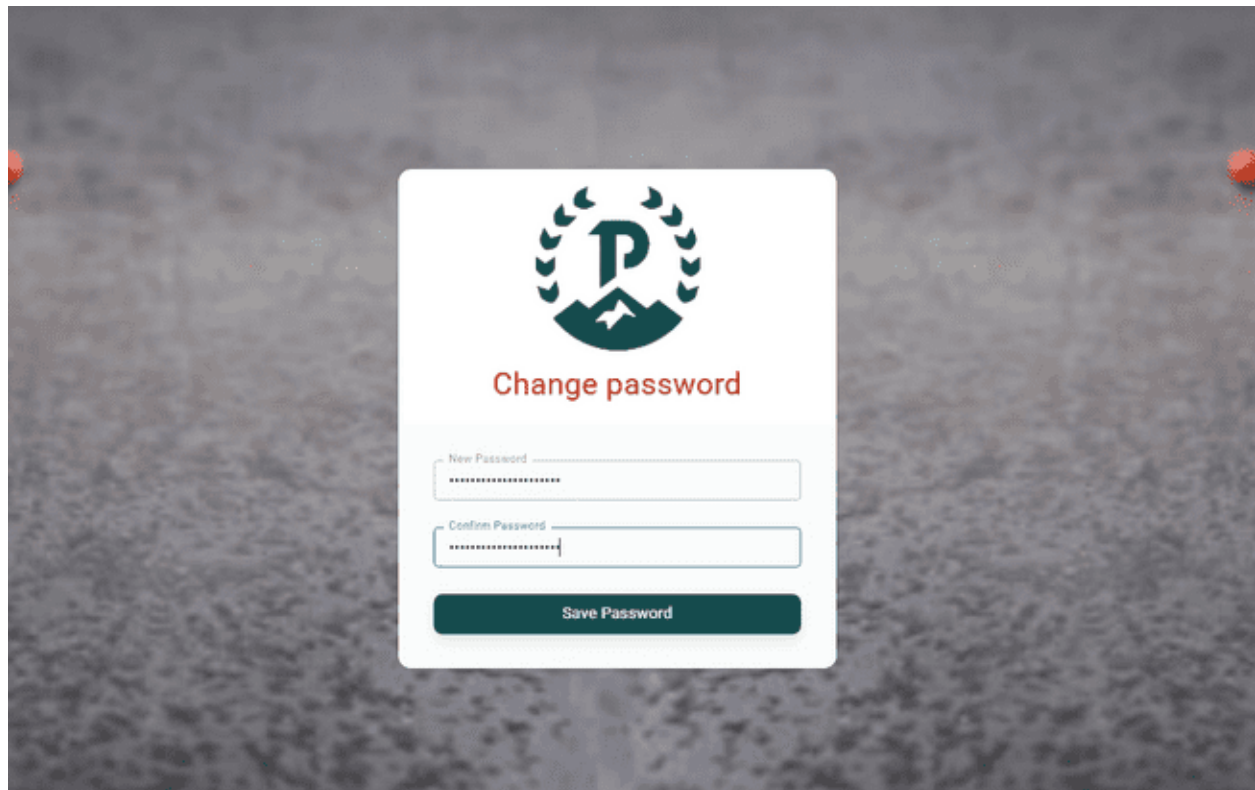
The image shows a login screen for the Price Book Printing Portal. At the top is a logo featuring a green 'P' inside a laurel wreath. Below the logo, the text 'Price Book Printing Portal' is displayed in red. There are two input fields: 'Login/Valid Email ID' with the email 'cloudmgr@beyondexs.com' entered, and 'Password' with masked characters. A 'Login' button is positioned below the password field, and a 'Forgot password ?' link is at the bottom right.

Step 9: Click the 'Login' button.

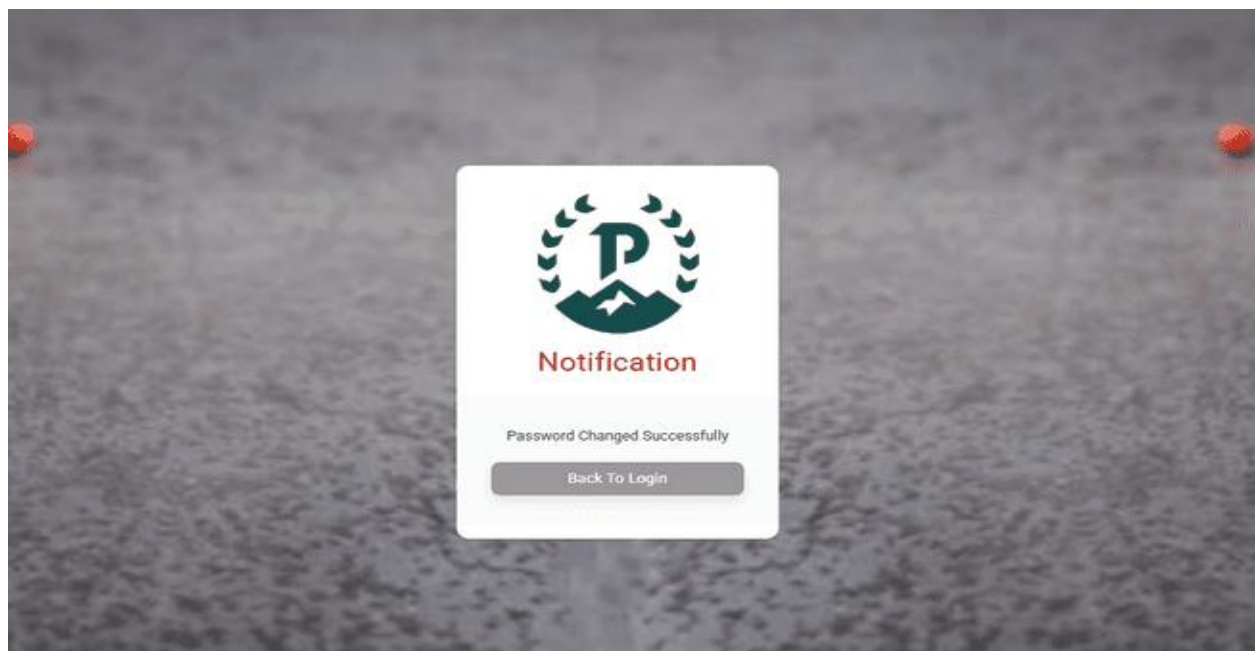


The image shows a 'Change password' screen. It features the same green 'P' logo at the top. Below the logo, the text 'Change password' is displayed in red. There are two input fields: 'New Password' and 'Confirm Password'. A green 'Save Password' button is located at the bottom.

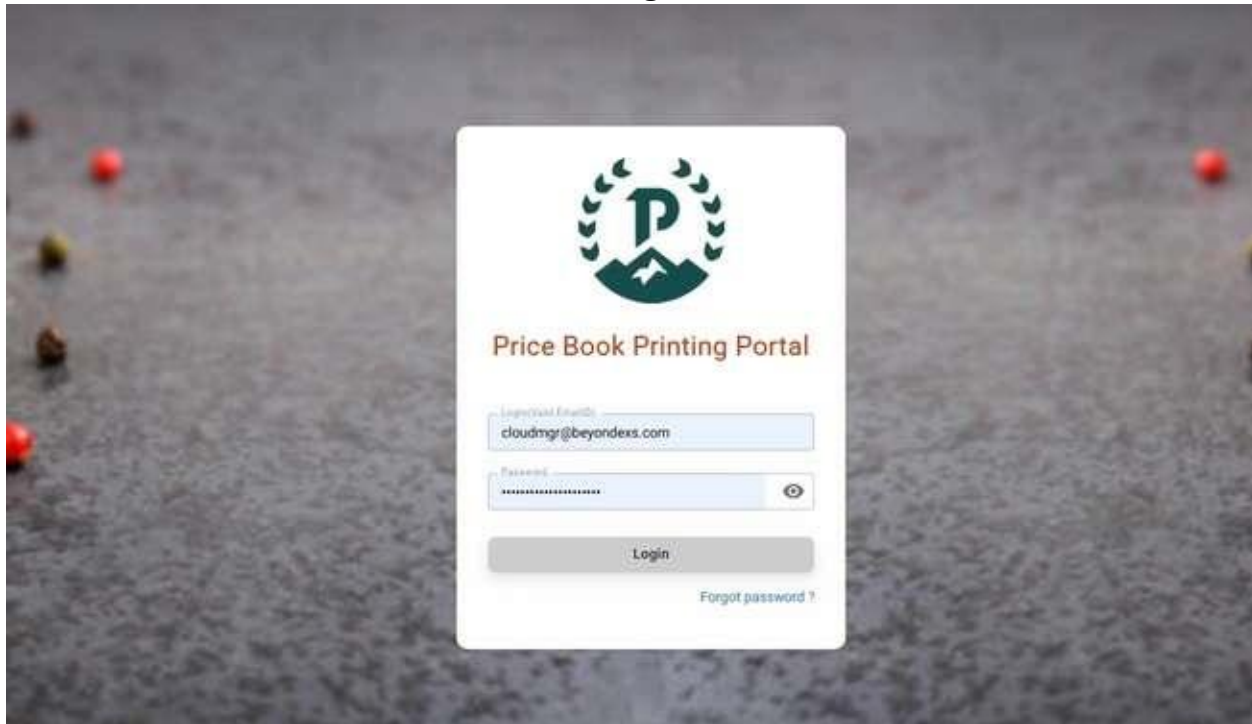
Step 10: Enter the new password and confirm the password.



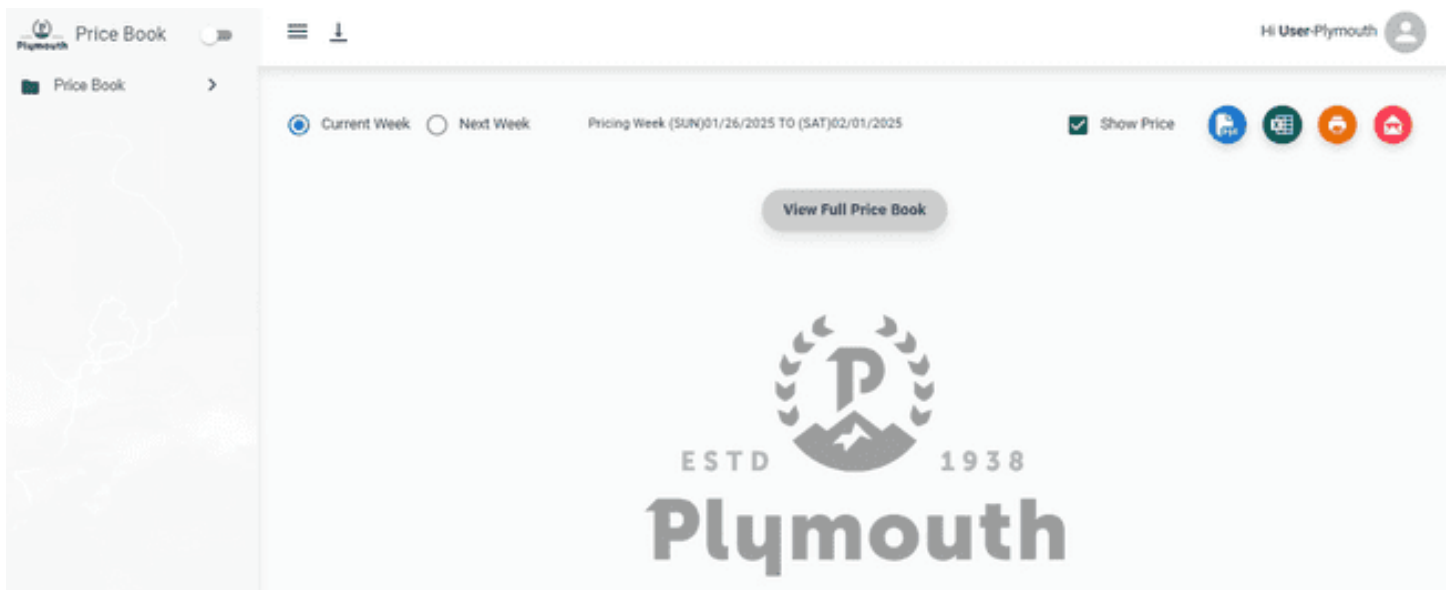
Step 11: Click 'Save Password,' and the screen below will appear.



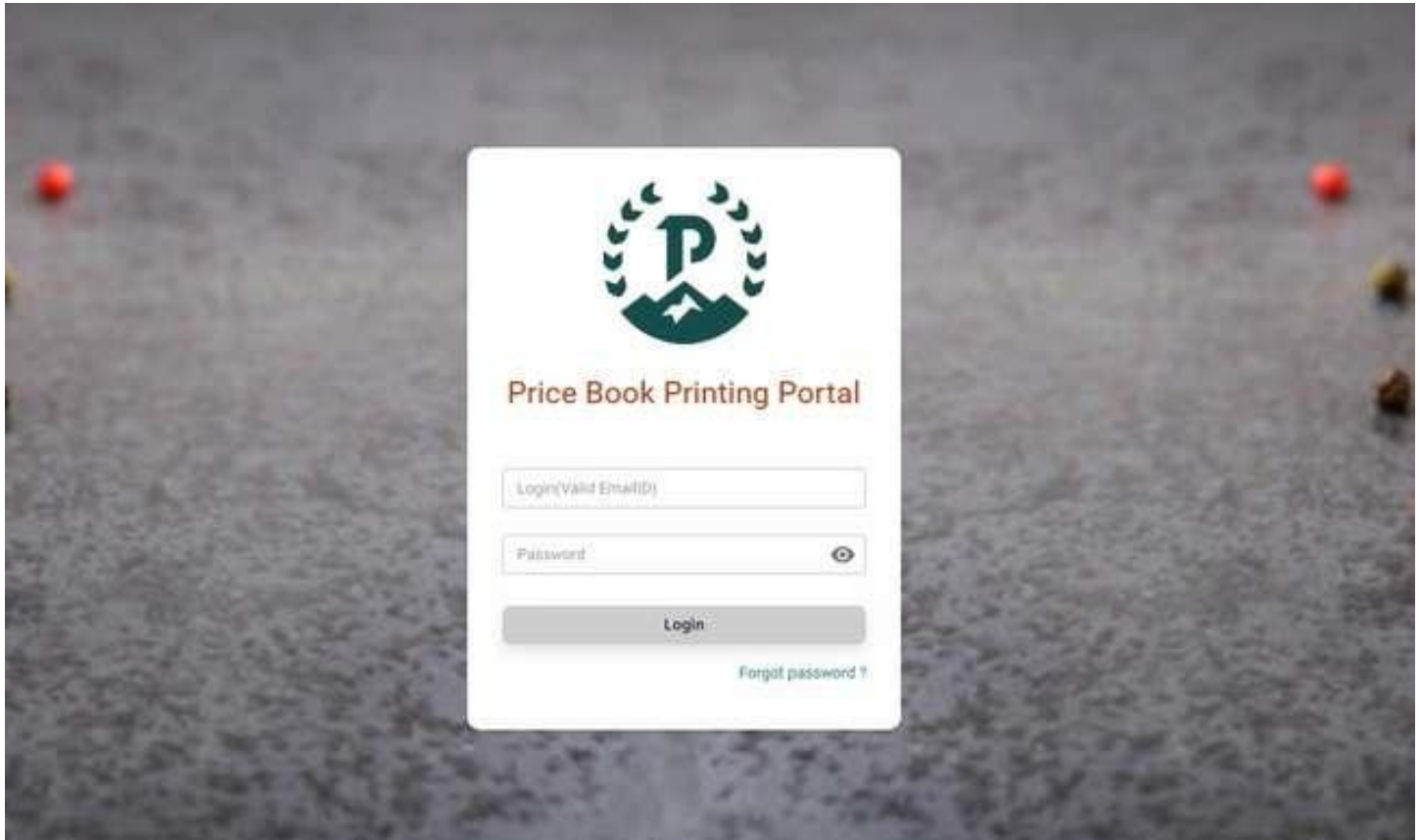
Step 12: Then, log in using your user credentials.



Step 13: The Plymouth user page will appear.

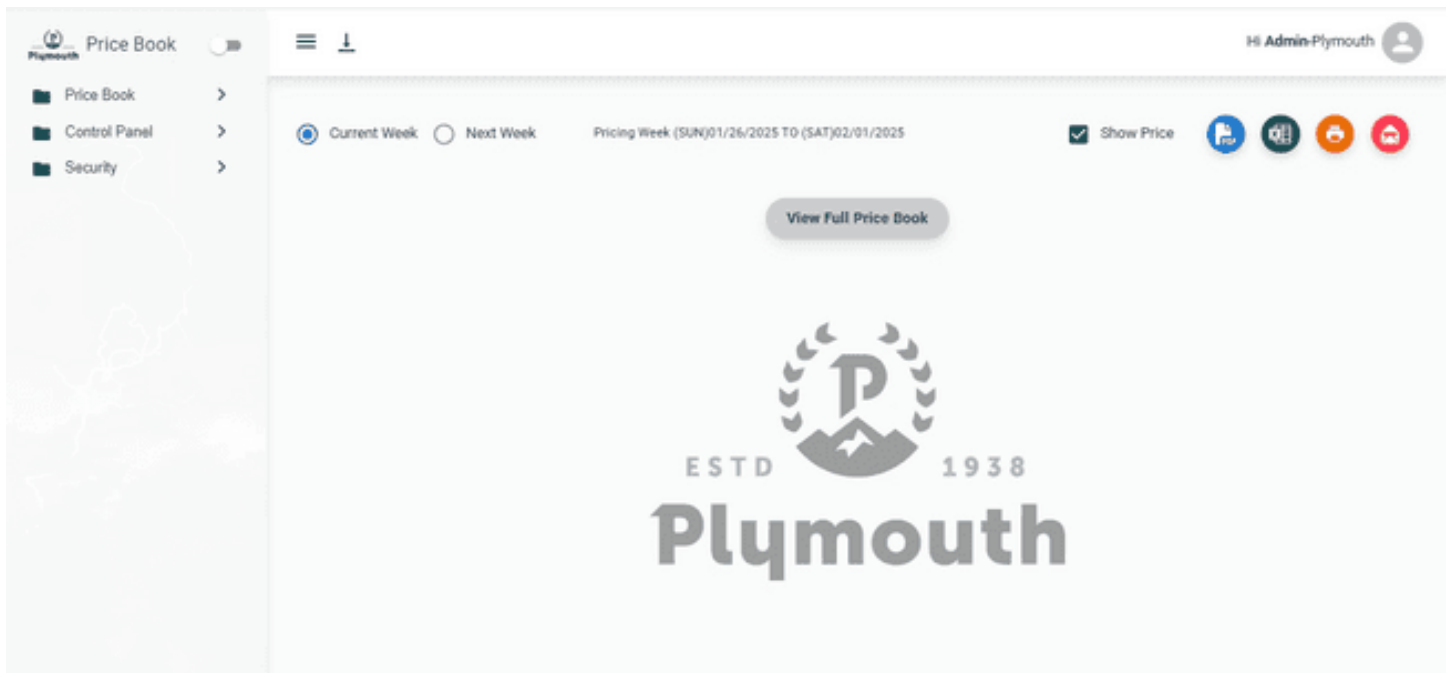


Login Page



- This page indicates us to Login into the Plymouth App.
- Required Valid Email.
- Required Valid Password contains Alphanumeric & Special Characters.
- Then Click Login to Enter into the Application.
- If we forgot the password the user mail will get one Password copy that in password field.
- For Creating the New password contains Alphanumeric & Special Characters.
- Enter the same password in new password & Confirm Password field.
- Then, save and open the app using your credentials.
- The Plymouth Home screen will appear.

Home



This is the Home Screen for Plymouth Application.



- This On/Off button that **Min & Max** the size of the Plymouth Screen.







- This is the **Menu Control**.



- This used for to download the **Manual PDF**.



- By clicking this we can appear below screen.

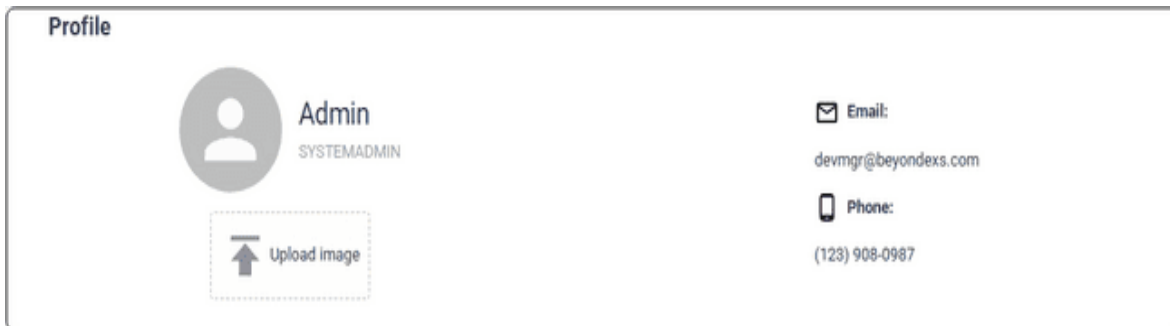
-  Home
-  Profile
-  Settings
-  Logout

Home

- By clicking this we can go directly to the **Home Screen**.

Profile

- By Clicking this we profile Screen will appear.



- Here we can upload the profile Image of the User.
- We can also see the Email & Phone No Too

Settings

- By clicking this we can open the Setting Screen



Price Book Printing Portal Manual



Settings

Company
Plymouth



Upload

Save

- In Company Field We can change **Portal** according to the User need.
- We can upload the images according to the user needs and click the Save button to save.

Logout

- By clicking the application will **Logout**.

☒ Current Week

- By clicking this we can get **Current Week Date**.

☐ Next Week

- By Clicking this we can get **Next Week Date**.

View Full Price Book

- By clicking this we can download entire Plymouth data price.

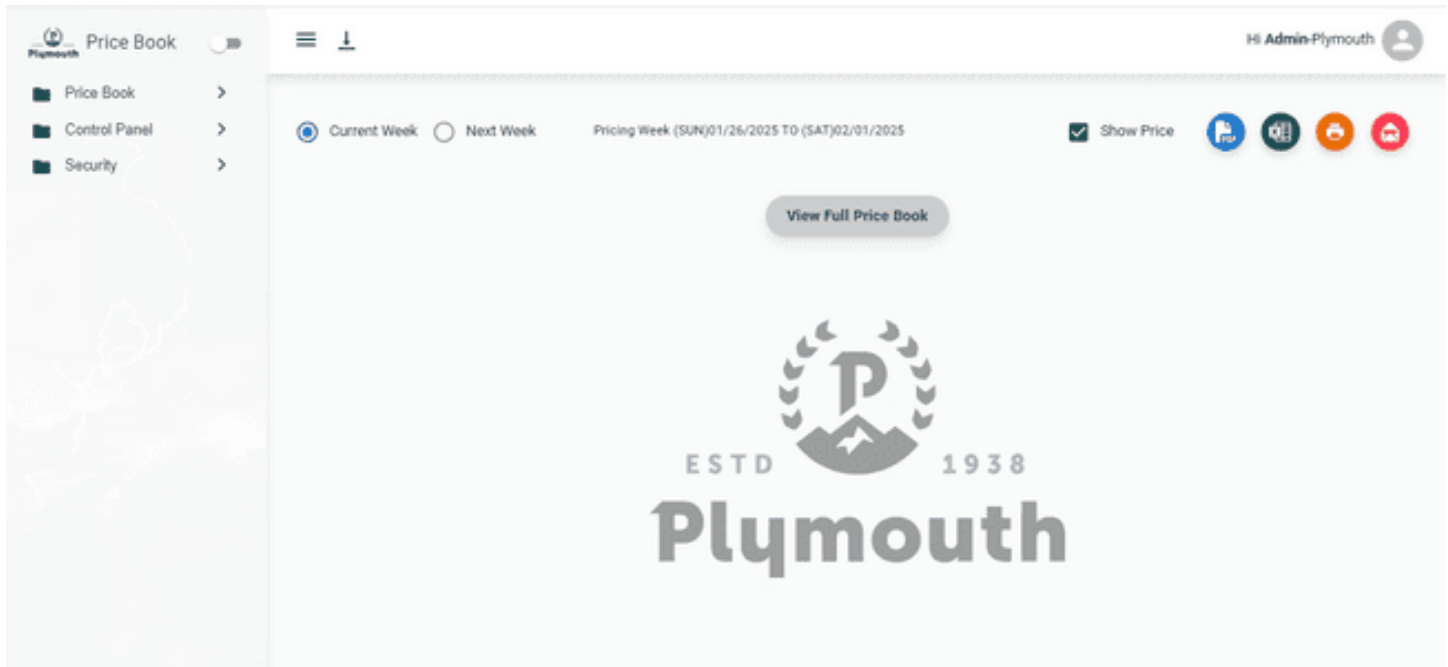
☐ Show Price

- In this check box there are two options.
- If we click the checkbox we can download the Data with Price.
- If we unclick the checkbox we can download the Data without Price.



- **PDF:** By clicking, we can generate the PDF.
- **EXCEL:** By clicking, we can generate the Excel file.
- **PRINT:** By clicking, we can print the PDF.
- **MAIL:** By clicking, we can automatically send an email to the user.

Home Screen

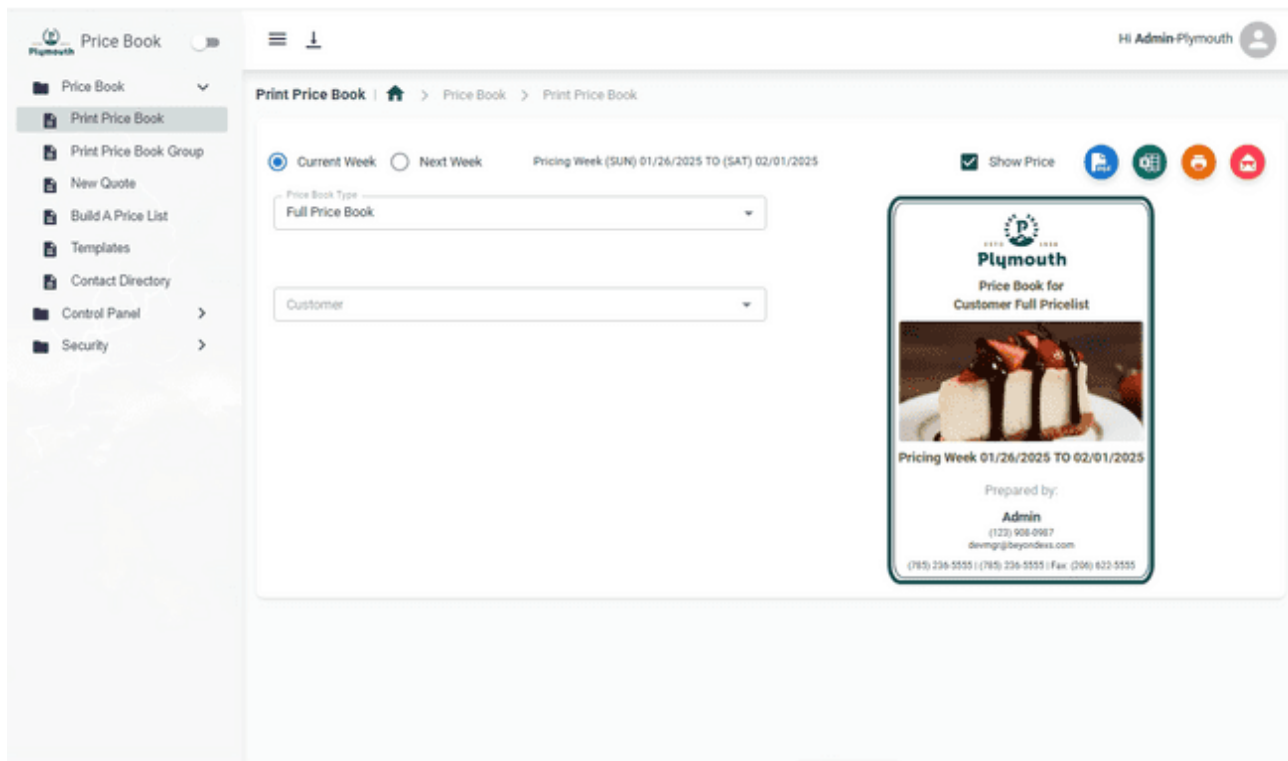


- This is the Plymouth Home Screen.
It contains different types of options:
- **On/Off Tooltip:** Used to minimize and maximize the screen size.
- **Menu Tooltip:** Used to minimize and maximize the screen size.
- **Download Tooltip:** Used to download the workflow for Plymouth.
- **Current Week:** Displays the current date.
- **Next Week:** Displays the upcoming dates.
- **View Full Price Book:** Clicking this will download the Plymouth PDF.
- If the checkbox is enabled, the "Show Price" PDF will download with the price list.
- If the checkbox is disabled, the "Show Price" PDF will download without the price list.
- Clicking the icons for PDF, Excel, Print, or Mail will generate the respective file accordingly.

Price Book

Print Price Book

Price Book > Print Price Book



- There are two types of price book are available.
 - Full Price Book
 - Custom Price Book

In the Full Price Book, we have a Customer Price Book. In this list, you can add any customer, and the same customer will be updated in the Customer Custom Pricelist according to the current date and the next date. The user can then generate the PDF, Excel, and Print as needed.

Print Price Book Group

Price Book > Print Price Book Group

Print Price Book Group

Current Week

Next Week

Pricing Week (SUN)01/26/2025 TO (SAT)02/01/2025

☒ Show Price

Price Book Group

Unassigned Customers

+

Price Book Group

Search...

<input type="checkbox"/>	Customer Number	Customer Name	Full Price Book	Custom Price Book
No rows				

Rows per page: 100

0-0 of 0

<

>

Email Price Book(s)

View Price Book

Price Book Printing Portal Manual




By clicking the "Add" symbol, the display below will appear.

Print Price Book Group | [Home](#) > [Price Book](#) > [Print Price Book Group](#)

☒ Current Week
 ☐ Next Week
 Pricing Week (SUN)01/26/2025 TO (SAT)02/01/2025
 ☒ Show Price

Price Book Group:
 Unassigned Customers:
 +

Price Book Group Search...

Customer Number	Customer Name	Full Price Book	Custom Price Book
 Please Select Price Book Group Close			
No rows			

Rows per page: 100 0-0 of 0 < >

[Email Price Book\(s\)](#)
[View Price Book](#)

In this section, we can add the Price Book Group and unassigned customers, which will be added below.

Print Price Book Group | [Home](#) > [Price Book](#) > [Print Price Book Group](#)

☒ Current Week
 ☐ Next Week
 Pricing Week (SUN)01/26/2025 TO (SAT)02/01/2025
 ☒ Show Price

Price Book Group: BPARKER
 Unassigned Customers: 92499 || Corfini Gourmet
 +

Price Book Group Search...

	Customer Number	Customer Name	Full Price Book		Custom Price Book	
<input checked="" type="checkbox"/>	321464	Johnson's Smokehouse	<input type="checkbox"/> Excel	<input checked="" type="checkbox"/> PDF	<input type="checkbox"/> Excel	<input type="checkbox"/> PDF
<input checked="" type="checkbox"/>	351875	Kirby Company	<input checked="" type="checkbox"/> Excel	<input checked="" type="checkbox"/> PDF	<input type="checkbox"/> Excel	<input type="checkbox"/> PDF
<input checked="" type="checkbox"/>	441102	wraps	<input type="checkbox"/> Excel	<input checked="" type="checkbox"/> PDF	<input checked="" type="checkbox"/> Excel	<input type="checkbox"/> PDF
<input checked="" type="checkbox"/>	593512	Tacoma Boys - South Hill Puyallup	<input type="checkbox"/> Excel	<input checked="" type="checkbox"/> PDF	<input type="checkbox"/> Excel	<input type="checkbox"/> PDF
<input checked="" type="checkbox"/>	92700	Corfini Gourmet dba Pats Quality Meats	<input checked="" type="checkbox"/> Excel	<input checked="" type="checkbox"/> PDF	<input type="checkbox"/> Excel	<input checked="" type="checkbox"/> PDF
<input type="checkbox"/>	34054	Albertsons, Inc.	<input type="checkbox"/> Excel	<input type="checkbox"/> PDF	<input type="checkbox"/> Excel	<input type="checkbox"/> PDF
<input type="checkbox"/>	61576	Blake & Ellis, Inc.	<input type="checkbox"/> Excel	<input type="checkbox"/> PDF	<input type="checkbox"/> Excel	<input type="checkbox"/> PDF
<input type="checkbox"/>	30123	H & L Produce Co.	<input type="checkbox"/> Excel	<input type="checkbox"/> PDF	<input type="checkbox"/> Excel	<input type="checkbox"/> PDF

5 rows selected

Rows per page: 100 1-8 of 8 < >

[Email Price Book\(s\)](#)
[View Price Book](#)



Price Book Printing Portal Manual

In the "Customer Number" field, if more than 5 are enabled, the screen below will appear, and the "View Price Book" option will be disabled.

Print Price Book Group | [Home](#) > Price Book > Print Price Book Group

☒ Current Week ☐ Next Week Pricing Week (SUN)01/26/2025 TO (SAT)02/01/2025 ☒ Show Price

Price Book Group: BPARKER Unassigned Customers: 92499 || Corfini Gourmet +

Price Book Group Search...

	Customer Number	Customer Name	Full Price Book		Custom Price Book	
<input checked="" type="checkbox"/>	321464	Johnson's Smokehouse	<input type="checkbox"/> Excel	<input checked="" type="checkbox"/> PDF	<input type="checkbox"/> Excel	<input type="checkbox"/> PDF
<input checked="" type="checkbox"/>	351875	Kirby Company	<input checked="" type="checkbox"/> Excel	<input checked="" type="checkbox"/> PDF	<input type="checkbox"/> Excel	<input type="checkbox"/> PDF
<input checked="" type="checkbox"/>	441102	wrays	<input type="checkbox"/> Excel	<input checked="" type="checkbox"/> PDF	<input checked="" type="checkbox"/> Excel	<input type="checkbox"/> PDF
<input checked="" type="checkbox"/>	593512	Tacoma Boys - South Hill Puyallup	<input type="checkbox"/> Excel	<input checked="" type="checkbox"/> PDF	<input type="checkbox"/> Excel	<input type="checkbox"/> PDF
<input checked="" type="checkbox"/>	92700	Corfini Gourmet dba Pats Quality Meats	<input checked="" type="checkbox"/> Excel	<input checked="" type="checkbox"/> PDF	<input type="checkbox"/> Excel	<input checked="" type="checkbox"/> PDF
<input checked="" type="checkbox"/>	34054	Albertsons, Inc.	<input type="checkbox"/> Excel	<input type="checkbox"/> PDF	<input type="checkbox"/> Excel	<input type="checkbox"/> PDF
<input type="checkbox"/>	61576	Blake & Ellis, Inc.	<input type="checkbox"/> Excel	<input type="checkbox"/> PDF	<input type="checkbox"/> Excel	<input type="checkbox"/> PDF
<input type="checkbox"/>	30123	H & L Produce Co.	<input type="checkbox"/> Excel	<input type="checkbox"/> PDF	<input type="checkbox"/> Excel	<input type="checkbox"/> PDF

6 rows selected Rows per page: 100 1-8 of 8

Note: To View Price Book, select no more than 5 rows at a time

Email Price Book(s) View Price Book

If the user clicks the "Email Price Book(s)" button, the selected Customer Name will receive an email.

Print Price Book Group | [Home](#) > Price Book > Print Price Book Group

☒ Current Week ☐ Next Week Pricing Week (SUN)01/26/2025 TO (SAT)02/01/2025 ☒ Show Price

Price Book Group: BPARKER Unassigned Customers: +

Price Book Group Search...

	Customer Number	Customer Name	Full Price Book		Custom Price Book	
<input type="checkbox"/>	321464	Johnson's Smokehouse	<input type="checkbox"/> Excel	<input checked="" type="checkbox"/> PDF	<input type="checkbox"/> Excel	<input type="checkbox"/> PDF
<input type="checkbox"/>	351875		<input checked="" type="checkbox"/> Excel	<input checked="" type="checkbox"/> PDF	<input type="checkbox"/> Excel	<input type="checkbox"/> PDF
<input checked="" type="checkbox"/>	441102		<input type="checkbox"/> Excel	<input checked="" type="checkbox"/> PDF	<input checked="" type="checkbox"/> Excel	<input type="checkbox"/> PDF
<input type="checkbox"/>	593512		<input type="checkbox"/> Excel	<input checked="" type="checkbox"/> PDF	<input type="checkbox"/> Excel	<input type="checkbox"/> PDF
<input type="checkbox"/>	92700		<input checked="" type="checkbox"/> Excel	<input checked="" type="checkbox"/> PDF	<input type="checkbox"/> Excel	<input checked="" type="checkbox"/> PDF

1 row selected Rows per page: 100 1-5 of 5

Email Price Book(s) View Price Book

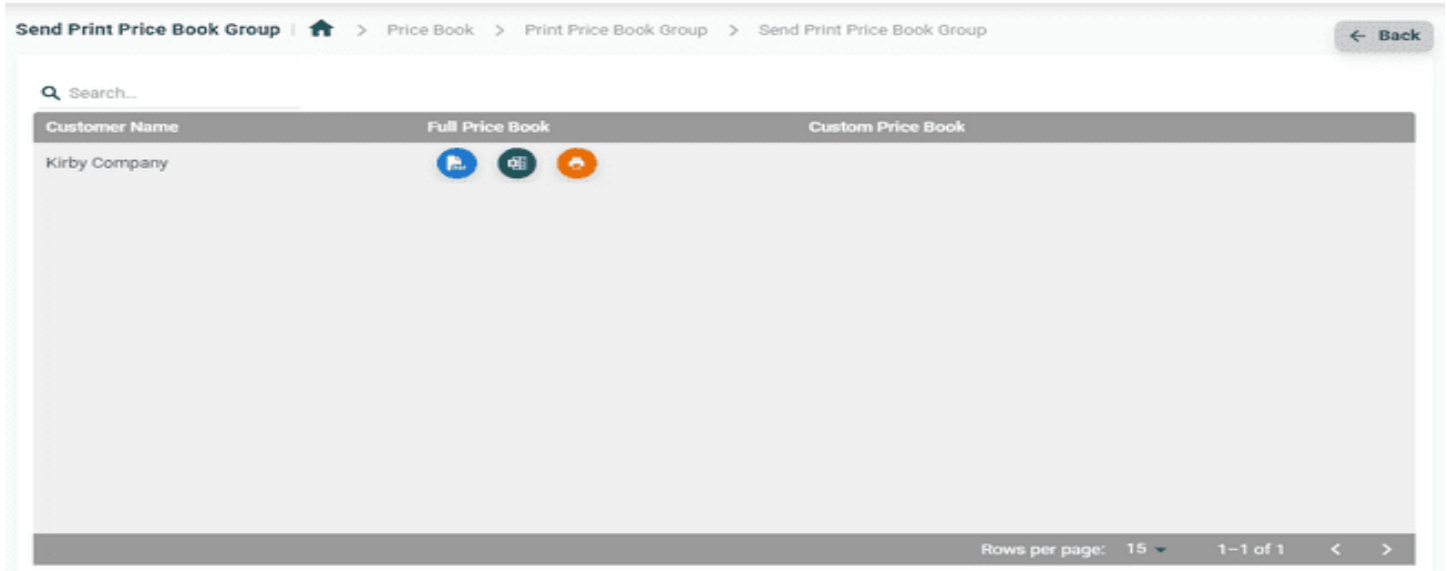
Customer(s) will receive their Price Book shortly

Close

Send Print Price Book Group

Price Book > Print Price Book Group > Send Print Price Book Group


If the user clicks the "View Price Book(s)" button, the selected Customer Name will generate a PDF and print options.



Here, the user can choose from PDF, Excel, and print options.

Quote

Price Book > New Prospect

New Prospect |  > Price Book > New Prospect

Company* Plymouth	Date* 02/03/2025
Sales Representative Name* Admin	Prospect Name*
Mobile	Service Provider
Address	City
State	Zip
Price Book Level*	Email

Preferred Format
☒ Pdf ☒ Excel

Next →

This is the New Prospect screen.

If the user clicks the "Next" button, a pop-up will appear asking them to enter the mandatory details.

After filling in all the details, the user can click the "Next" button, and the next screen will appear.



Price Book Printing Portal Manual



Quote

Price Book > New Prospect > Quote

Quote | Home > Price Book > New Prospect > Quote

Current Week | Next Week | Pricing Week (SUN)02/02/2025 TO (SAT)02/08/2025

Show Price

Options

Attributes

Price List

GOATS L.

017978

Broken Items

Damaged Items

Combination Filter

Search

Apply Filters & Save

Clear Filters

Item Number	Item Description	Ad Hoc Item	Action
000068	Labels Onb(Fullcase) NonGmo - 15 Rolls (C.N.B)	No	
001007	Sample Payless Foods 10311 - Fresh (Mba)	No	
001010	Sample Los Juanes - Frozen (Packer)	No	
001011	Sample Ralphs Thriftway #1 - Fresh (Meyer)	No	
001013	Sample Vashon Thriftway #0 - Fresh (Meyer)	No	
001025	Sample Food Depot - Fresh (Seaboard)	No	
001027	Sample Shaw's Quality - Labels (Anderson)	No	
001028	Sample Uwajimaya Renton - Labels (Anderson)	No	
001042	Sample Uwajimaya Bellevue - Labels (Anderson)	No	

Rows per page: 100 | 1-100 of 15085

This is the Quote Screen.

Based on the user's needs, you can download the PDF, Excel, or print by enabling or disabling the "Show Price" option.

By clicking the "Include All" button, you can enable data entry for inclusion or exclusion.

In the Price List & HOC, we can add data, which will be displayed in the Grid Menu.

The search bar allows you to filter the grid items.

Clicking "Clear Filters" will delete all data on the entire screen.

Build A Price List

Price Book > Build A Price List

Build A Price List

Price Book

Build A Price List

Current Week

Next Week

Pricing Week (SUN)02/02/2025 TO (SAT)02/08/2025

Show Price

Company

Plymouth

Date

02/04/2025

Sales Representative Name

Admin

Price List Name

Test1

Customer

300100 || AA Meets - Lakewood

Price Book Level

Price Book Level 6

Preferred Format

PDF

Excel

Options

Attributes

Include/Exclude

Include All

Brand

Include/Exclude

Include All

Com || Cat

Include/Exclude

Include All

Alternative Class

Include/Exclude

Include All

Vendor

Include/Exclude

Include All

Fs || Fz

Include/Exclude

Include All

ClassID

Include/Exclude

Include All

Secondary Class

Ad Hoc Items

Ad Hoc Items

017978 ... 014547 ... +1

Broken Items

Damaged Items

Combination Filter

Apply Filters & Save

Clear Filters

Item Number	Item Description	Ad Hoc Item	Action
017978	Shanks Sliced 1in - 10# Rdm Fz (Vanguard)	Yes	
014547	Pork Chop 3/4 In Oc - 5/Cyp 10# Fz (Vanguard)	Yes	
014057	Spare ribs Slc 1" Fz - 40# Rdm (Vanguard)	Yes	

Rows per page: 100

1-3 of 3

This is the "Build A Price List" screen.

The user must enter the mandatory fields.

The user can download the PDF and Excel by enabling or disabling the options.

In the options, the user can choose "Include All," which allows them to select what to include or exclude for the products.

When entering products in the Attributes section, the selected items will appear in the Grid View.

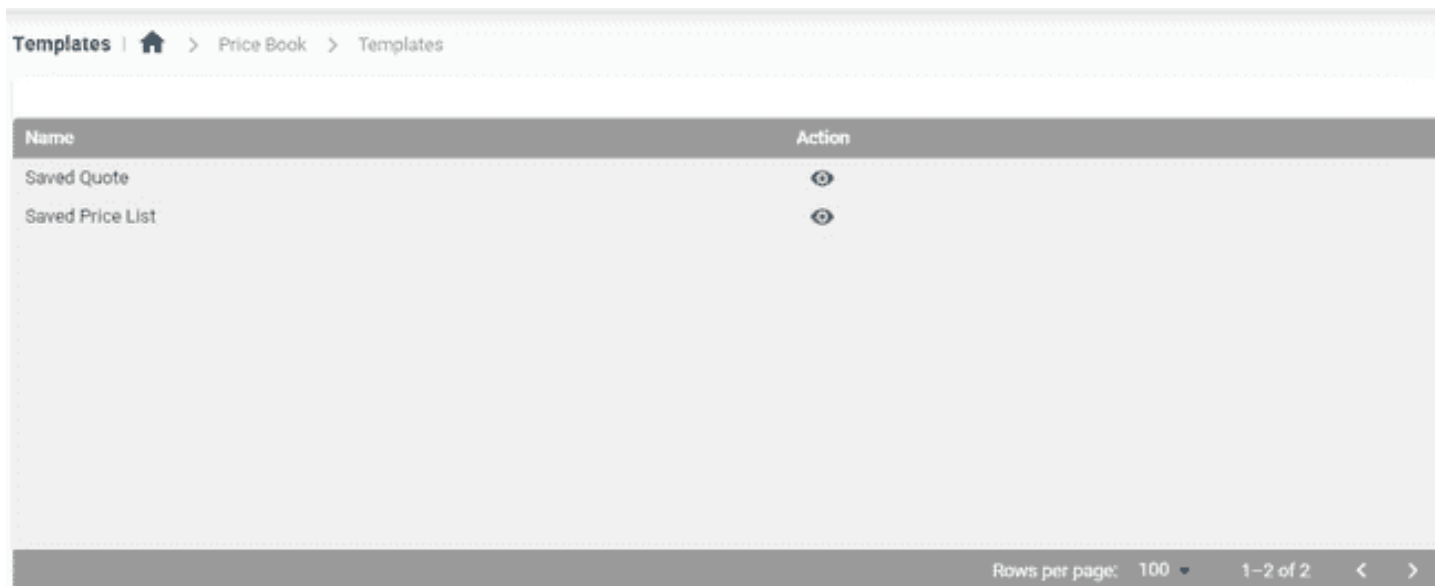
In the search bar, the user can filter the data they need.



The user can enable or disable the HOC items as needed.

If the user clicks "Clear Filters," all data will be cleared.

Templates

Price Book > Templates



Name	Action
Saved Quote	
Saved Price List	

This is the Templates screen.

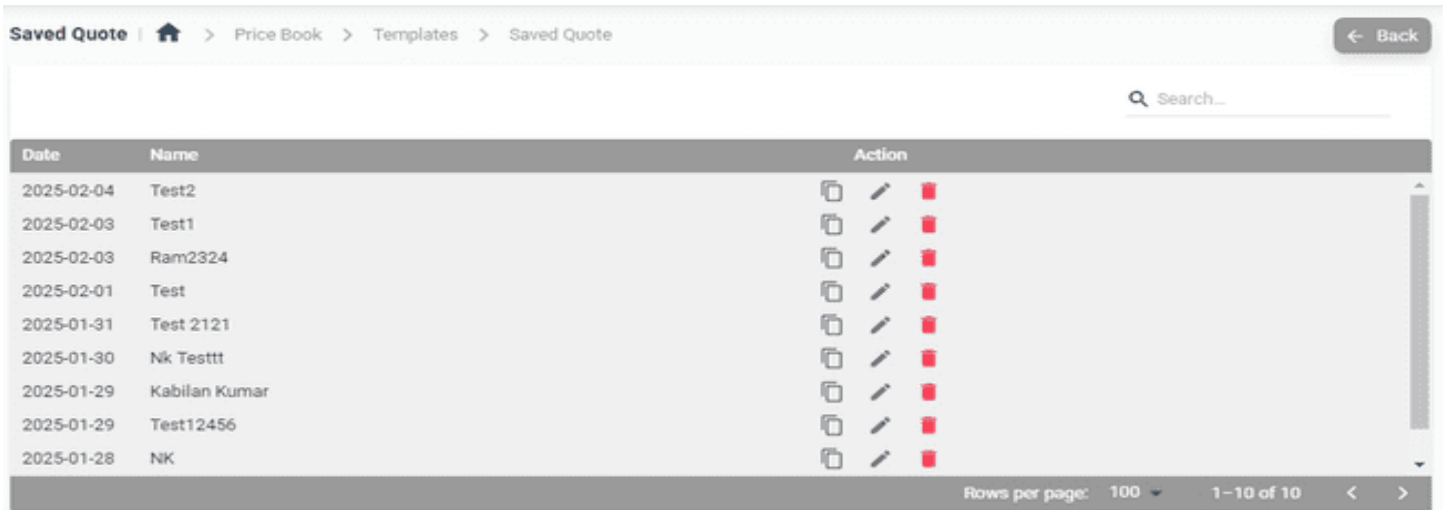
In this screen, there are two options: Saved Quote and Saved Price List.

When the user saves data in New Quote, it will be saved in the Saved Quote.




























When the user saves data in Build A Price List, it will be saved in the Saved Price List.

Saved Quote

Price Book > Templates > Saved Quote



The screenshot shows a web application interface for 'Saved Quote'. At the top, there is a breadcrumb navigation: 'Saved Quote' > Home > Price Book > Templates > Saved Quote. A 'Back' button is in the top right. Below the navigation is a search bar with a magnifying glass icon and the text 'Search...'. The main content is a table with three columns: 'Date', 'Name', and 'Action'. The table contains 10 rows of data. Each row in the 'Action' column has three icons: a document icon for copy, a pencil icon for edit, and a red square icon for delete. At the bottom right of the table, there is a pagination control showing 'Rows per page: 100' and '1 - 10 of 10' with navigation arrows.

Date	Name	Action
2025-02-04	Test2	  
2025-02-03	Test1	  
2025-02-03	Ram2324	  
2025-02-01	Test	  
2025-01-31	Test 2121	  
2025-01-30	Nk Testtt	  
2025-01-29	Kabilan Kumar	  
2025-01-29	Test12456	  
2025-01-28	NK	  

This is the Saved Quote screen.

Here, the user can copy, edit, or delete the list based on their preferences.

It will navigate to the New Prospect screen, where the user can edit the details and save.

Saved Price List

Price Book > Templates > Saved Price List

Saved Price List
|
Home
>
Price Book
>
Templates
>
Saved Price List

Back

Search...

Date	Price List Name	Customer Name	Action
2025-02-04	Test2	3 Sisters Family Farms	
2025-02-04	Test1	AA Meats - Lakewood	
2025-02-03	ramtest343	3 Sisters Family Farms	
2025-02-03	ram2234234	4 Bar W Beef	
2025-02-03	Ram1	4 Bar W Beef	
2025-02-03	Kabilan@12	4 Bar W Beef	
2025-02-01	Kabilan	3 Sisters Family Farms	
2025-01-31	goat	AA Meats - Lakewood	
2025-01-30	Ram34	21 Century Trading, Inc.	

Rows per page: 100
1-11 of 11

<
>


This is the Saved Price List screen.


Here, the user can copy, edit, or delete the list based on their preferences.













It will navigate to the Build A Price List screen, where the user can edit the details and save.

Contact Directory

Price Book > Contact Directory

Contact Directory |  > Price Book > Contact Directory

Company: Plymouth 
Search...

Customer Name	Price Book Group	Action
Rudy's Markets	LBASKETT	
Dawsco Corporation	BHART	
DA Xing Seafood	LAUREN.INABA	
Day-Lee Foods	KPEDERSEN	
Dean's Distributing	BHART	
Alaska Sea Pack	BHART	
Demas Dist. & Produce Inc.	DWICKLANDER	
Gold Bar Family Grocer	KPEDERSEN	
Don & Joe's Meats, LLC	LBASKETT	
Double DD Meats	TONY.FLANAGAN	
Double Rafter Livestock	HOUSE	
Evergreen Meats	TONY.FLANAGAN	

Rows per page: 100 1-100 of 233 < >

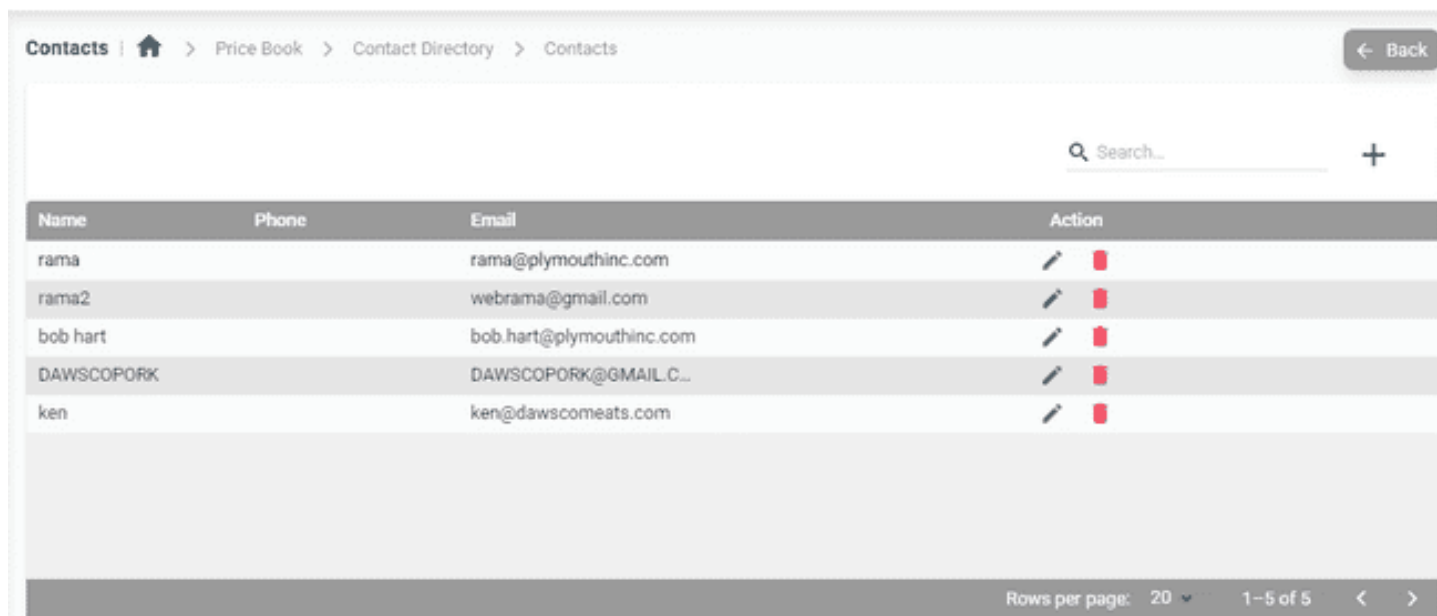
This is the Contact Directory screen.











The "Company" field has different company options that the user can select and save.

In the search bar, the user can filter the data as needed.

Contacts

Price Book > Contact Directory > Contacts



Name	Phone	Email	Action
rama		rama@plymouthinc.com	 
rama2		webrama@gmail.com	 
bob hart		bob.hart@plymouthinc.com	 
DAWSCOPORK		DAWSCOPORK@GMAIL.C...	 
ken		ken@dawscomeats.com	 

Rows per page: 20 1-5 of 5

This is the Contacts screen.

If the user clicks the "Back" button, it will navigate to the Contact Directory screen.

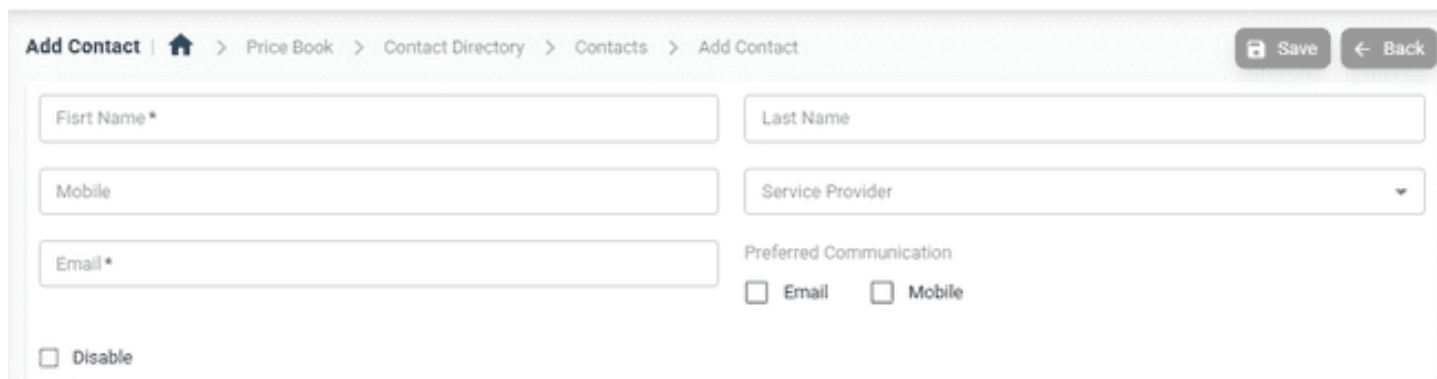
In the search bar, the user can filter names in the Grid View.

In the "Actions" section, by clicking the "Edit" option, the user can edit their information and click "Save" to save the data.

To add a new user, click the "Add" symbol.

Add Contact

Price Book > Contact Directory > Contacts > Add Contact



The screenshot shows the 'Add Contact' form in a web application. At the top, there is a breadcrumb trail: 'Add Contact | Home > Price Book > Contact Directory > Contacts > Add Contact'. To the right of the breadcrumbs are two buttons: 'Save' and 'Back'. The form contains several input fields: 'First Name *', 'Last Name', 'Mobile', 'Service Provider' (a dropdown menu), 'Email *', and 'Preferred Communication'. Under 'Preferred Communication', there are two checkboxes: 'Email' and 'Mobile'. At the bottom left, there is a checkbox labeled 'Disable'.


This is the Add Contact screen.

In this screen, the user will add personal details and click "Save" to save the data.

If the user clicks the "Back" button, it will navigate to the Contacts screen.





































Control Panel

Control Panel > Price List

Price List |  > Control Panel > Price List

Company
Plymouth

Search...

<input type="checkbox"/>	Price List ID	Price List Description	Action
<input type="checkbox"/>	GOATS	Goats	  
<input type="checkbox"/>	HEMPLE	Hempler	  
<input type="checkbox"/>	MBA	Smart Chicken	  
<input type="checkbox"/>	SHMPPD	Shrimp - Cooked and Peeled	  
<input type="checkbox"/>	SHMPEZ	Shrimp - Easy Peel	  
<input type="checkbox"/>	PHILLS	Painted Hills Beef	  
<input type="checkbox"/>	MISCSF	Miscellaneous Seafood	  
<input type="checkbox"/>	DRAP2D	Draper Stocked Items	  
<input type="checkbox"/>	DUCKS	Ducks, Rabbit & Other Game Meats	  
<input type="checkbox"/>	GLENW	Glenwood	  
<input type="checkbox"/>	FARM	Farmland Sausage	  
<input type="checkbox"/>	CEMPVG	Cutting Edge Vanguard	  

Rows per page: 100
1-100 of 168

Price Book Category
Add Price List To Price Book Category

This is the Control Panel screen.

In the "Company" field, there are different types of options that users can select from.

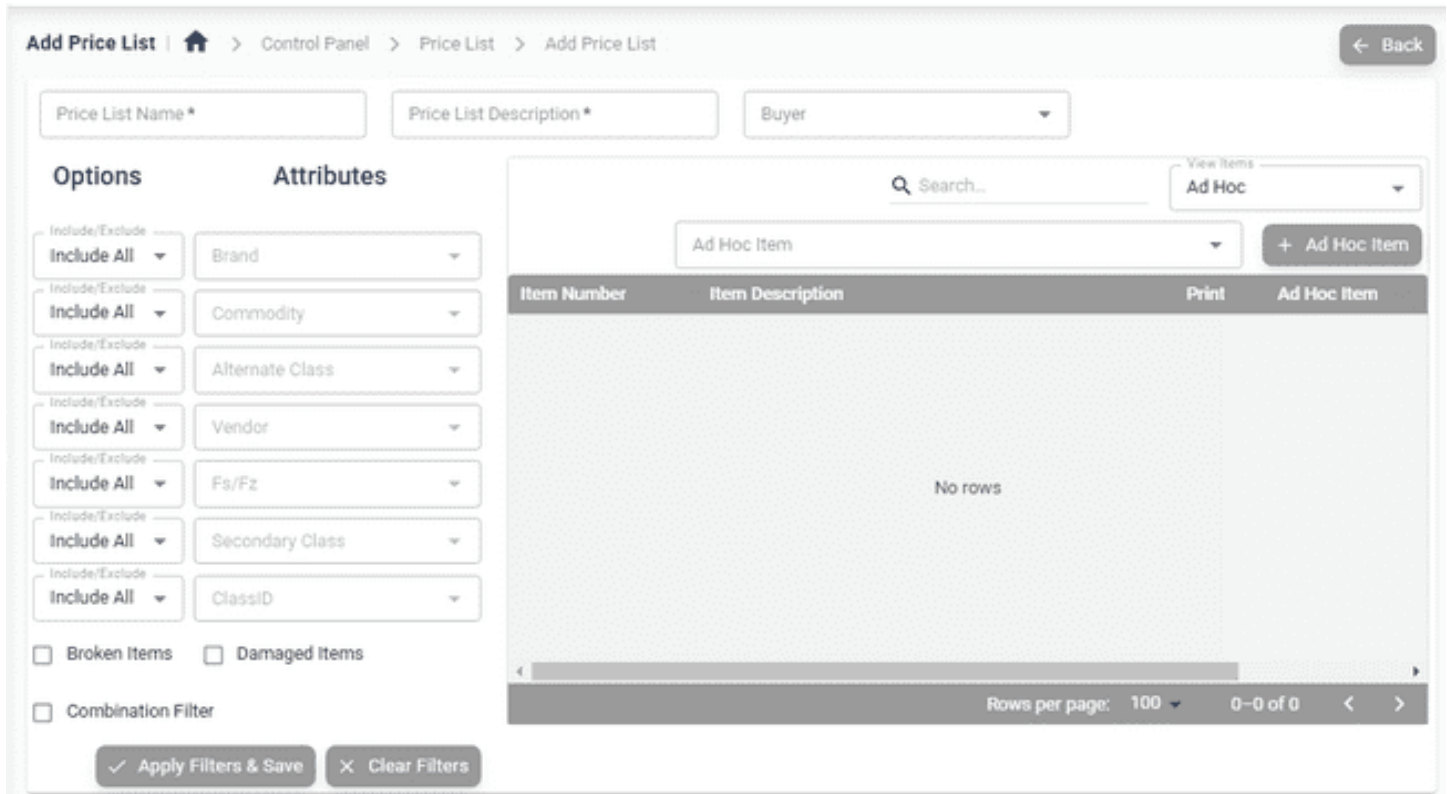
In the search bar, the user can filter the data as needed.

To add a new user, click "Add," and it will navigate to the Add Price List screen.

In the "Price Book Category" field, click on the products, then click on the Price List ID, and click "Add Price List to Price Book Category." This will navigate to the Edit Categories screen.

Add Price List

Control Panel > Price List > Add Price List



The screenshot shows the 'Add Price List' screen. At the top, there is a breadcrumb trail: 'Add Price List > Control Panel > Price List > Add Price List'. A 'Back' button is in the top right corner. Below the breadcrumb, there are three input fields: 'Price List Name *', 'Price List Description *', and a 'Buyer' dropdown menu. The main area is divided into two sections: 'Options' and 'Attributes'. The 'Options' section contains several 'Include/Exclude' dropdowns, each with an 'Include All' option, and checkboxes for 'Broken Items', 'Damaged Items', and 'Combination Filter'. The 'Attributes' section contains dropdown menus for 'Brand', 'Commodity', 'Alternate Class', 'Vendor', 'Fs/Fz', 'Secondary Class', and 'ClassID'. Below these are two buttons: 'Apply Filters & Save' and 'Clear Filters'. On the right side, there is a search bar with a magnifying glass icon and a 'View Items' dropdown menu. Below the search bar is an 'Ad Hoc Item' dropdown menu and a '+ Ad Hoc Item' button. A table with the following headers is shown: 'Item Number', 'Item Description', 'Print', and 'Ad Hoc Item'. The table body is empty, displaying 'No rows'. At the bottom right of the table, there is a pagination bar showing 'Rows per page: 100' and '0-0 of 0'.

This is the Add Price List screen.

The user needs to fill in the mandatory fields: Price List Name and Price List Description.

If the user clicks the "Back" button, it will navigate to the Price List screen.

In the search bar, the user can filter the data in the grid view.

In the "View Items" section, there are different types of fields.

In the "Ad Hoc Items" section, the user can add ad hoc items as needed.

In the "Options" section, there is an "Include All" option, where the user can include or exclude the items they want.

There are checkboxes that the user can enable or disable according to their needs.

This data is reflected in the grid view and saved in the Price List screen.

If the user clicks the "Clear Filters" button, all data will be erased.

Edit Price List

Control Panel > Price List > Edit Price List

Edit Price List
Control Panel > Price List > Edit Price List
Back

Price List Name *
Price List Description *
Buyer

GOATS
Goats
Buyer

Options
Attributes

Include/Exclude
Include
Brand

Include/Exclude
Include All
Commodity

Include/Exclude
Include All
Alternate Class

Include/Exclude
Include All
Vendor

Include/Exclude
Include All
Fs/Fz

Include/Exclude
Include
Secondary Class
Spices

Include/Exclude
Include All
ClassID

☐ Broken Items
☐ Damaged Items

☐ Combination Filter

☒ Apply Filters & Save

Search...
View Items
All

Item Number	Item Description	Print	Ad Hoc Item
019002	Diced 2X2	<input checked="" type="checkbox"/>	Yes
019007	Goats Diced 1X1	<input checked="" type="checkbox"/>	Yes
019009	Goats Diced 1.5X1.5	<input checked="" type="checkbox"/>	Yes
019013	Goats Diced DOM 2X2	<input checked="" type="checkbox"/>	Yes
019067	FB Goat 1x1	<input checked="" type="checkbox"/>	Yes
019068	FB Goat Skin-On 2x2	<input checked="" type="checkbox"/>	Yes
019104	FB Goat 1x1	<input type="checkbox"/>	Yes
019114	Halal Goats Diced 2x2	<input checked="" type="checkbox"/>	Yes
019123	Cut Goat 2.5"	<input checked="" type="checkbox"/>	Yes

Rows per page: 100
1-9 of 9

This is the Edit Price List screen.

If the user clicks the "Back" button, it will navigate to the Price List screen.

In the search bar, the user can filter the data as needed.

The user can edit the data according to their needs and save it.

View Price List

Control Panel > Price List > View Price List

View Price List |
Control Panel >
Price List >
View Price List
Back

Price List Name *
GOATS
Price List Description *
GOAT
Buyer

Options
Attributes

Include/Exclude
Include
Include/Exclude
Include All
Include/Exclude
Include All
Include/Exclude
Include All
Include/Exclude
Include
Include/Exclude
Include All

Brand
Commodity
Alternate Class
Vendor
Fs/Fz
Secondary Class
Spices
ClassID

☐ Broken Items
☐ Damaged Items
☐ Combination Filter

Apply Filters & Save
Clear Filters

Search...
View Items
All

Item Number	Item Description	Print	Ad Hoc Item
019002	Diced 2X2	<input checked="" type="checkbox"/>	Yes
019007	Goats Diced 1X1	<input checked="" type="checkbox"/>	Yes
019009	Goats Diced 1.5X1.5	<input checked="" type="checkbox"/>	Yes
019013	Goats Diced DOM 2X2	<input checked="" type="checkbox"/>	Yes
019067	FB Goat 1x1	<input checked="" type="checkbox"/>	Yes
019068	FB Goat Skin-On 2x2	<input checked="" type="checkbox"/>	Yes
019104	FB Goat 1x1	<input type="checkbox"/>	Yes
019114	Halal Goats Diced 2x2	<input checked="" type="checkbox"/>	Yes
019123	Cut Goat 2.5"	<input checked="" type="checkbox"/>	Yes
145505	Salt Chili Lime Dry - 1/5# (La Mexicana)	<input checked="" type="checkbox"/>	No
565412	Seasoning Tortilla Soup Azteca Dry - 20/6oz (Mex	<input checked="" type="checkbox"/>	No

Rows per page: 100
1-100 of 145


This is the View Price List screen.


If the user clicks "Back," they will be navigated to the Price List screen.

























The user cannot edit any fields on this screen.

Categories

Control Panel > Categories

Categories |  > Control Panel > Categories

Q Search... 

Category	Description	Print Sequence	Action
BEEF	Beef	A	 
RES1	BEEF / RES	AA	 
CHICKN	Chicken	C	 
POLLO1	CHICKEN/POLLO	CA	 
HISPA1	PRODUCTOS HISPANOS	DB	 
MARIS1	SEAFOOD / MARISCOS	EA	 
MANTEC	MANTECA Y ACEITES	FA	 
LAMBVE	Lamb & Veal	G	 
PORK	Pork	I	 
SEAFD	Seafood	K	 
TURKEY	Turkey	M	 
NEW1	Smithfield Further Processed	N	 

Rows per page: 100 1-23 of 23 < >

This is the Categories screen.


In the search bar, the user can filter the data as needed.

Here, the user can edit or delete the category list.

When the user clicks the "Add" symbol, it will navigate to the Add Categories screen.

Add categories


Control Panel > Categories > Add categories

Add Categories |  > Control Panel > Categories > Add Categories Save Back

Category Name *

Category Description *

Sequence

 Search...

Company *
Plymouth

Add Price List

+

Price List Name	Price List Description	Print Group	Action
No rows			

Rows per page: 100 0-0 of 0 < >

This is the Categories screen.


Here, the user can add data in the mandatory fields and in the Add Price List section, then click the "Add" symbol.



The data will be stored in the grid view.

























When the data is saved, it will be saved and the user will be navigated back to the Categories screen.

Price Book Group

Control Panel > Company > Price Book Group

Price Book Group |  > Control Panel > Company > Price Book Group

Company  Plymouth Q Search... 

Name	Description	Action
DWICKLANDER	DWICKLANDER	 
SCOTT	SCOTT	 
BERNARDO	BERNARDO	 
AKRISTJANSON	AKRISTJANSON	 
PMENELLA	PMENELLA	 
CYNTHIA	CYNTHIA	 
HOUSE	HOUSE	 
BPARKER	BPARKER	 
TANNER	TANNER	 
CZIELINSKI	CZIELINSKI	 
JARED.MITCHELL	JARED.MITCHELL	 
SMATSON	SMATSON	 

Rows per page: 100 1-27 of 27 < >

This is the Price Book Group screen.

In the "Company" field, there are different company options that the user can select from.

In the search bar, the user can filter the data as needed.

Here, the user can edit or delete data.

To add a new field to the Price Book Group, click on the "Add" symbol, which will navigate to the Add Price Book Group screen.











Edit Price Book Group

Control Panel > Price Book Group > Edit Price Book Group

Edit Price Book Group
Control Panel > Price Book Group > Edit Price Book Group
Save
Back

Price Book Group: DWICKLANDER
Assigned Customers:
+

Search...

Customer Number	Customer Name	Action
594106	Spring Market	
60154	B & L Trading LLC	
61770	Boo Han Oriental Market Edmonds	
61771	Boo Han Oriental Market Tacoma	
622735	Tapatios Distributors	
710867	Willamette Valley Meat Co.	
91404	China Foods	
91405	CP Food Service Co.	
93009	Crown Pacific Fine Foods	
182725	Fulton Provisions	

Rows per page: 100
1-24 of 24

This is the Edit Price Book Group screen.

The user can add details in the mandatory fields and assign customers, then click Save.


Click the Add symbol to add data to the Grid View.

By clicking the Delete icon, the added customer name will be deleted.

























Clicking the Back button will navigate to the Price Book Group screen.

Proprietary items

Control Panel > Proprietary items

Proprietary Items |  > Control Panel > Proprietary Items

Search...

Item Number	Item Description	Customer Number	Customer Name	Action
017973	DB Grd Bf Wagyu Fs - 5/1# (Dist Butcher)	120463	DA Xing Seafood	 
017973	DB Grd Bf Wagyu Fs - 5/1# (Dist Butcher)	120675	Gold Bar Family Grocer	 
017973	DB Grd Bf Wagyu Fs - 5/1# (Dist Butcher)	121108	Double Rafter Livestock	 
017973	DB Grd Bf Wagyu Fs - 5/1# (Dist Butcher)	151102	Evergreen Meats	 
017973	DB Grd Bf Wagyu Fs - 5/1# (Dist Butcher)	180445	Blossom on Lopez	 
017973	DB Grd Bf Wagyu Fs - 5/1# (Dist Butcher)	180800	Whiskey Hill Smokehouse	 
017973	DB Grd Bf Wagyu Fs - 5/1# (Dist Butcher)	181851	Food Services, Inc.	 
017973	DB Grd Bf Wagyu Fs - 5/1# (Dist Butcher)	181965	US Foods - Spokane	 
014155	Pig Skin-Belly Fz - 25# Bulk (Vanguard)	120464	Day-Lee Foods	 
014155	Pig Skin-Belly Fz - 25# Bulk (Vanguard)	120629	Alaska Sea Pack	 
014155	Pig Skin-Belly Fz - 25# Bulk (Vanguard)	120675	Gold Bar Family Grocer	 
014155	Pig Skin-Belly Fz - 25# Bulk (Vanguard)	120953	Don & Joe's Meats, LLC	 

Rows per page: 100 1-35 of 35

This is the Proprietary Items screen.

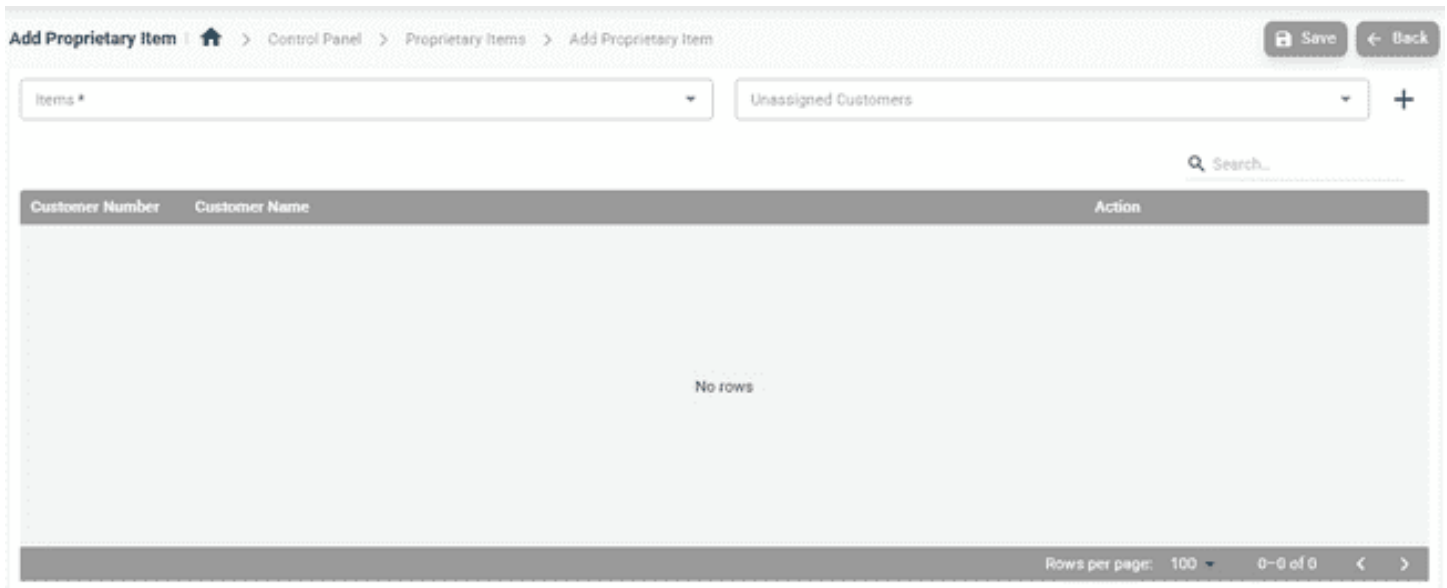
In the search bar, the user can filter the data as needed.

In this screen, the user can edit or delete item numbers in the Grid View.

To add a new field to the Grid View, click the Add symbol, which will navigate to the appropriate screen.

Add Proprietary Item

Control Panel > Proprietary Items > Add Proprietary Item



The screenshot shows the 'Add Proprietary Item' screen. At the top, there is a breadcrumb trail: 'Add Proprietary Item' > 'Control Panel' > 'Proprietary Items' > 'Add Proprietary Item'. To the right of the breadcrumbs are 'Save' and 'Back' buttons. Below the breadcrumbs, there are two dropdown menus: 'Items *' and 'Unassigned Customers'. To the right of these dropdowns is a '+' button. Below the dropdowns is a search bar with a magnifying glass icon and the text 'Search...'. Below the search bar is a table with three columns: 'Customer Number', 'Customer Name', and 'Action'. The table is currently empty, and the text 'No rows' is displayed in the center. At the bottom of the table, there is a footer that says 'Rows per page: 100' and '0-0 of 0'.

This is the Add Proprietary Items screen.

The user can enter data in the mandatory fields and assign customers. By clicking the Add symbol, the data will appear in the Grid View. Clicking the Save button will store the data in Proprietary Items.

Clicking the Back button will navigate to the Proprietary Items screen.

Company

Control Panel > Configure Price Book > Company

Company

Control Panel

Configure Price Book

Company

Search...


Company Name	Action
Plymouth	<div><div></div><div></div></div>
S & J Food Distributors	<div><div></div><div></div></div>
Nicky USA	<div><div></div><div></div></div>

Rows per page: 100



























1-3 of 3

Customer

Control Panel > Configure Price Book > Company > Customer

Customer |  > Control Panel > Configure Price Book > Company > Customer ← Back

Company: PM || Plymouth Search...

Customer Number	Customer Name	Price Level	Price Book group	Full Price Book		Custom Price Book		Action
1118130	Rudy's Markets	7	LBASKETT	<input type="checkbox"/> Excel	<input checked="" type="checkbox"/> PDF	<input type="checkbox"/> Excel	<input type="checkbox"/> PDF	 
120460	Dawson Corporation	6		<input type="checkbox"/> Excel	<input type="checkbox"/> PDF	<input type="checkbox"/> Excel	<input checked="" type="checkbox"/> PDF	 
120463	DA Xing Seafood	7	LAUREN.INABA	<input type="checkbox"/> Excel	<input checked="" type="checkbox"/> PDF	<input type="checkbox"/> Excel	<input type="checkbox"/> PDF	 
120464	Day-Lee Foods	6	KPEDERSEN	<input type="checkbox"/> Excel	<input checked="" type="checkbox"/> PDF	<input type="checkbox"/> Excel	<input type="checkbox"/> PDF	 
120466	Dean's Distributing	6		<input type="checkbox"/> Excel	<input checked="" type="checkbox"/> PDF	<input type="checkbox"/> Excel	<input checked="" type="checkbox"/> PDF	 
120629	Alaska Sea Pack	6		<input type="checkbox"/> Excel	<input checked="" type="checkbox"/> PDF	<input type="checkbox"/> Excel	<input type="checkbox"/> PDF	 
120635	Demas Dist. & Produce Inc.	6	DWICKLANDER	<input type="checkbox"/> Excel	<input type="checkbox"/> PDF	<input type="checkbox"/> Excel	<input checked="" type="checkbox"/> PDF	 
120675	Gold Bar Family Grocer	7	KPEDERSEN	<input type="checkbox"/> Excel	<input checked="" type="checkbox"/> PDF	<input type="checkbox"/> Excel	<input type="checkbox"/> PDF	 
120953	Don & Joe's Meats, LLC	7	LBASKETT	<input type="checkbox"/> Excel	<input checked="" type="checkbox"/> PDF	<input type="checkbox"/> Excel	<input checked="" type="checkbox"/> PDF	 
121102	Double DD Meats	7	TONY.FLANAGAN	<input type="checkbox"/> Excel	<input checked="" type="checkbox"/> PDF	<input type="checkbox"/> Excel	<input checked="" type="checkbox"/> PDF	 
121108	Double Rafter Livestock	7	HOUSE	<input type="checkbox"/> Excel	<input checked="" type="checkbox"/> PDF	<input type="checkbox"/> Excel	<input type="checkbox"/> PDF	 
151102	Evergreen Meats	7	TONY.FLANAGAN	<input type="checkbox"/> Excel	<input checked="" type="checkbox"/> PDF	<input type="checkbox"/> Excel	<input type="checkbox"/> PDF	 
180145	Fall City Meats & Seafood	7	LBASKETT	<input type="checkbox"/> Excel	<input checked="" type="checkbox"/> PDF	<input type="checkbox"/> Excel	<input type="checkbox"/> PDF	 

Rows per page: 100 1-100 of 221

This is the Customer Screen.

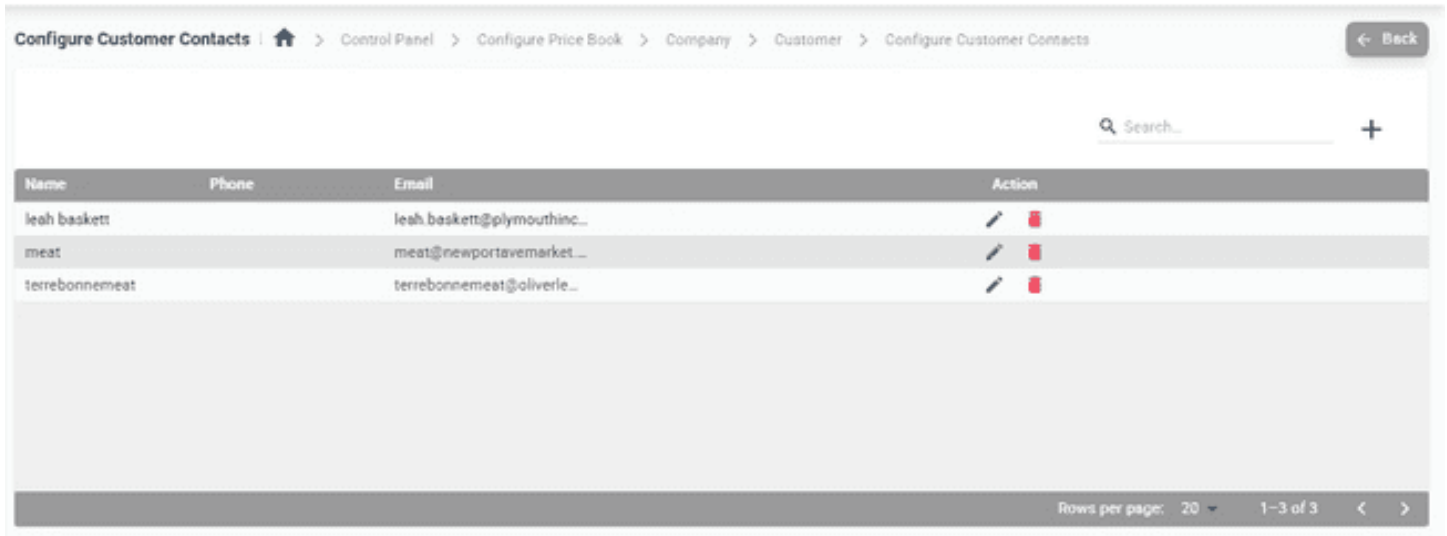
Here, the user can enable or disable the checkboxes for Excel and PDF as needed.







In the search bar, the user can filter the data as needed.

There are two icons: Contacts and Price Lists.

Configure Customer Contacts

Control Panel > Configure Price Book > Company > Customer > Configure Customer Contacts



Name	Phone	Email	Action
leah baskett		leah.baskett@plymouthinc...	 
meat		meat@newportavemarket...	 
terrebonne meat		terrebonne meat@oliverle...	 

This is the 'Configure Customer Contacts' screen.

In the search bar, the user can filter the data as needed.

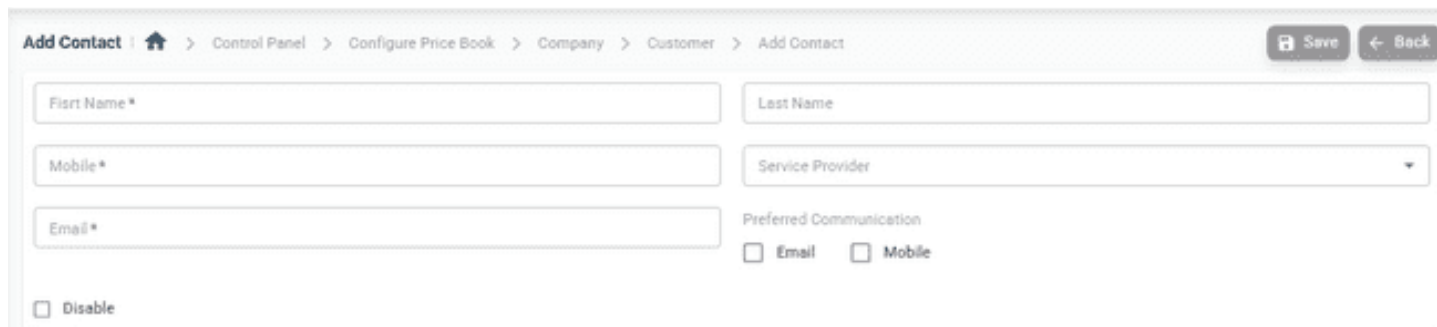
If the user clicks the 'Back' button, it will navigate to the Customer screen.

On this screen, there are two icons: 'Edit' and 'Delete' to modify the data.

To add a new contact, click on the 'Add' symbol.

Add Contact

Control Panel > Configure Price Book > Company > Customer > Add Contact



The screenshot shows the 'Add Contact' form within a web application. At the top, there is a breadcrumb trail: 'Add Contact > Control Panel > Configure Price Book > Company > Customer > Add Contact'. To the right of the breadcrumbs are two buttons: 'Save' and 'Back'. The form contains several input fields: 'First Name *', 'Last Name', 'Mobile *', 'Email *', and 'Service Provider' (a dropdown menu). Below these fields, there is a section for 'Preferred Communication' with two checkboxes: 'Email' and 'Mobile'. At the bottom left of the form, there is a checkbox labeled 'Disable'.

This is the Add Contact screen.

Here, the user can save the contact details.

By clicking the Save button the data will be saved in the Configure Customer Contacts screen.

Clicking the Back button will navigate to the Configure Customer Contacts screen.

Configure Customer Price List

Control panel > Configure Price Book > Company > Customer > Configure Customer Price List

Configure Customer Price List
< Back

Include Price List
+

Search...

Name	Description	Action
GOATS	Goats	
HEMPLE	Hempler	
SHMPPD	Shrimp - Cooked and Peeled	
SHMPEZ	Shrimp - Easy Peel	
PHILLS	Painted Hills Beef	
MISCSP	Miscellaneous Seafood	
DRAP2D	Draper Stocked Items	
DUCKS	Ducks, Rabbit & Other Game Meats	
GLENW	Glenwood	

Rows per page: 20
1-20 of 179

This is the Configure Customer Price List screen.

In the search bar, the user can filter the data as needed.

To add a new item to the Grid View, click on the Add symbol.

In the Include Price List field, if an item is added, it will not be added again.

By clicking the Delete icon, the name will be removed.

Clicking the Back button will navigate to the Customer Screen.

Configure Company Price List

Control Panel > Configure Price Book > Company > Configure Company Price List

Configure Company Price List
Control Panel
Configure Price Book
Company
Configure Company Price List
Save
Back

Company: PM || Plymouth

Price Book Title
Plymouth Inc

Price Book Level
Price Book Level 6

Include Price List
+

Search...

Name	Description	Action
GOATS	Goats	
HEMPLE	Hempler	
SHMPPD	Shrimp - Cooked and Peeled	
SHMPEZ	Shrimp - Easy Peel	
PHILLS	Painted Hills Beef	
MISCSF	Miscellaneous Seafood	
DRAP2D	Draper Stocked Items	
DUCKS	Ducks, Rabbit & Other Game Meats	
GLENW	Glenwood	

Rows per page: 100
1-100 of 166

This is the Configure Company Price List screen.

In the search bar, the user can filter the data as needed.

To add a new item to the Grid View, click on the Add symbol.

In the Include Price List field, if an item is added, it will not be added again.

By clicking the Delete icon, the name will be removed.

Clicking the Back button will navigate to the Company Screen.



Security

Company

Security > Company

Company | Home > Security > Company

Search...

+

Company Code	Company Name	Email	Address	Action
PM	Plymouth	plymouth@gmail.com	22 30th Street North East, #102 Auburn, W...	
SJ	S & J Food Distributors	sjdistributors@gmail.com	22 30th Street North East, #102 Auburn, W...	
NU	Nicky USA	nicky@gmail.com	223 SE 3rd Avenue Portland	

Rows per page: 100 1-3 of 3

This is the Company screen.

In the search bar, the user can filter the data as needed.

To add a new company to the grid view, click on the 'Add' symbol.

On this screen, there are two icons—'Edit' and 'Mail'—to make any changes.

Add Company Detail

Security > Company > Add Company Detail

Add Company Detail
Security > Company > Add Company Detail
Save
Back

Code *

Name *

Email *

Mobile *

Address 1

Address 2

Address 3

Sequence

Fax

☐ Disable

Price Book Title


Generic Full Price Book

Custom Full Price Book

Customer Custom Price Book


Price Book Cover Image

Full Price Book




Drop images

Customer Custom Price Book



Drop images

Customer Full Price Book



Drop images

This is the Add Company Details screen.

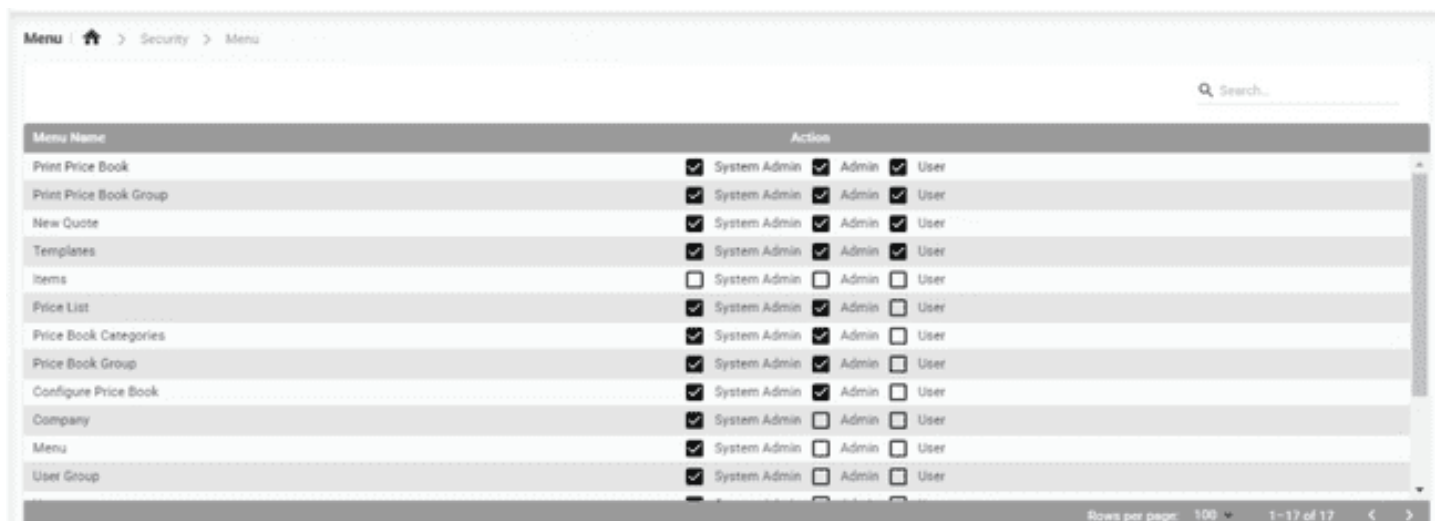
The user can fill in the mandatory details and upload images for the item.

Click the Save button to save the data.

Clicking the Back button will navigate to the Company screen.

Menu

Security > Menu



Menu Name	Action		
Print Price Book	<input checked="" type="checkbox"/> System Admin	<input checked="" type="checkbox"/> Admin	<input checked="" type="checkbox"/> User
Print Price Book Group	<input checked="" type="checkbox"/> System Admin	<input checked="" type="checkbox"/> Admin	<input checked="" type="checkbox"/> User
New Quote	<input checked="" type="checkbox"/> System Admin	<input checked="" type="checkbox"/> Admin	<input checked="" type="checkbox"/> User
Templates	<input checked="" type="checkbox"/> System Admin	<input checked="" type="checkbox"/> Admin	<input checked="" type="checkbox"/> User
Items	<input type="checkbox"/> System Admin	<input type="checkbox"/> Admin	<input type="checkbox"/> User
Price List	<input checked="" type="checkbox"/> System Admin	<input checked="" type="checkbox"/> Admin	<input type="checkbox"/> User
Price Book Categories	<input checked="" type="checkbox"/> System Admin	<input checked="" type="checkbox"/> Admin	<input type="checkbox"/> User
Price Book Group	<input checked="" type="checkbox"/> System Admin	<input checked="" type="checkbox"/> Admin	<input type="checkbox"/> User
Configure Price Book	<input checked="" type="checkbox"/> System Admin	<input checked="" type="checkbox"/> Admin	<input type="checkbox"/> User
Company	<input checked="" type="checkbox"/> System Admin	<input type="checkbox"/> Admin	<input type="checkbox"/> User
Menu	<input checked="" type="checkbox"/> System Admin	<input type="checkbox"/> Admin	<input type="checkbox"/> User
User Group	<input checked="" type="checkbox"/> System Admin	<input type="checkbox"/> Admin	<input type="checkbox"/> User

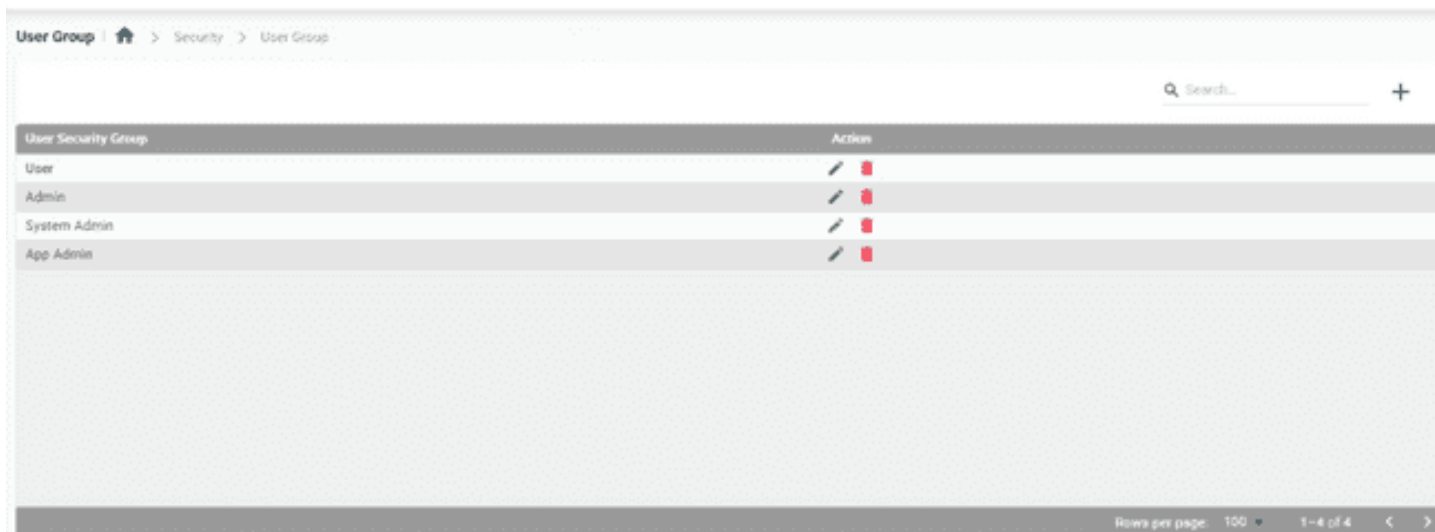
This is the Menu Screen.

In the search bar, users can filter the data according to their needs.









This screen is used to configure which user group can access which screen.

User Group

Security > User Group



The screenshot shows the 'User Group' management interface. At the top, there is a breadcrumb trail: 'User Group' > 'Security' > 'User Group'. Below this is a search bar with a magnifying glass icon and a plus sign. The main content area is a table with two columns: 'User Security Group' and 'Action'. The table contains four rows of data:

User Security Group	Action
User	 
Admin	 
System Admin	 
App Admin	 

At the bottom right of the table, there is a footer indicating 'Rows per page: 100' and '1 - 4 of 4'.

This is the user group screen.

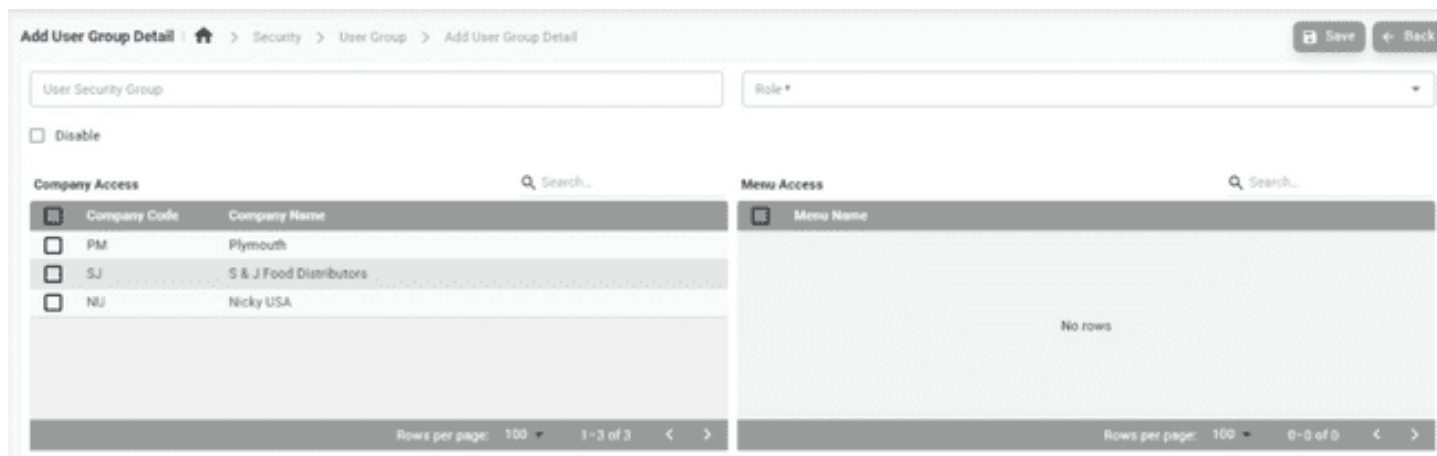
In the search bar, the user can filter the data as needed.

To create a new user group, click on the 'Add' symbol.

Using the 'Edit' and 'Delete' icons, the user can modify the data in the grid view.

Add User Group Detail

Security > User Group > Add User Group Detail



Add User Group Detail > Security > User Group > Add User Group Detail

Save Back

User Security Group

Role *

☐ Disable

Company Access Search...

Company Code	Company Name
<input type="checkbox"/> PM	Plymouth
<input type="checkbox"/> SJ	S & J Food Distributors
<input type="checkbox"/> NU	Nicky USA

Rows per page: 100 1-3 of 3

Menu Access Search...

Menu Name
No rows

Rows per page: 100 0-0 of 0

This is the Add User Group Details screen.

The user can enter the details and click the Save button to save the data.

In the Grid View, the user can assign access to a particular screen.

In the search bar, the user can filter the data as needed.


























Clicking the Back button will navigate to the User Group Screen.

User

Security > User

User | Home > Security > User

Search...

First Name	Last Name	Login ID	Company	Action
Admin		devmgr@beyondex.com	Plymouth	 
Shankar	Ganesh	shankar.ganesh@plymouthinc.com	Nicky USA	 
Rama	Arumugam	rama@plymouthinc.com	Plymouth	 
geoff	latham	geoff.latham@nickyusa.com	Nicky USA	 
steve	russell	steve.russell@plymouthinc.com	Plymouth	  
bob	hart	bob.hart@plymouthinc.com	Plymouth	 
cynthia	solorzano	cynthia.solorzano@plymouthinc.com	Plymouth	 
Everardo	Sanchez	everardo.sanchez@sandfoods.com	Plymouth	 
User		cloumgr@beyondex.com	Nicky USA	 
User 2		deliverymgr@beyondex.com	Plymouth	 
Itzel		itzel.jaimez@plymouthinc.com	Plymouth	 
Daniel	ibarra	Daniel.ibarra@plymouthinc.com	Plymouth	 

Rows per page: 100 1-13 of 13

This is the User Screen.

In the search bar, the user can filter the data as needed.

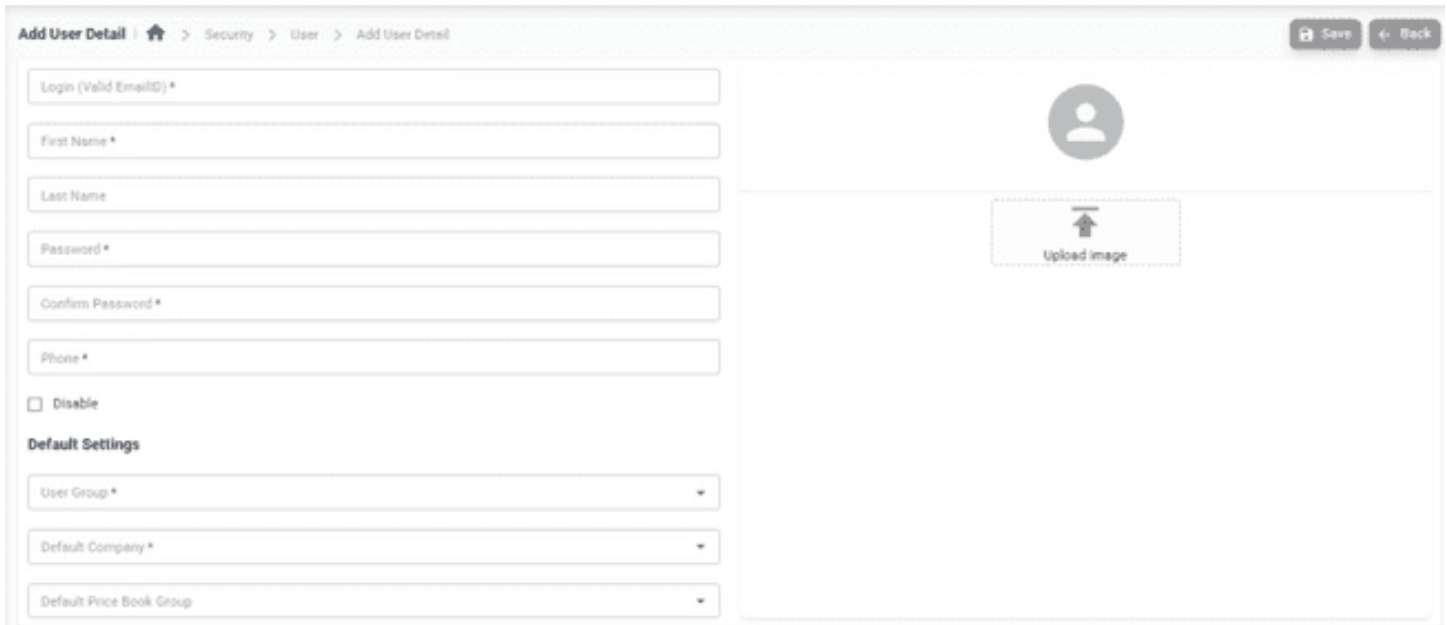
To create a new user, click on the Add symbol.

Using the Edit and Delete icons, the user can modify the data in the Grid View.

On the Login Page, if the user enters the wrong username and password and clicks the login button 3 to 5 times, the user will be locked out.

Add User Detail

Security > User > Add user Detail



The screenshot shows the 'Add User Detail' form in a web application. The form is divided into two main sections. The left section contains input fields for 'Login (Valid EmailID) *', 'First Name *', 'Last Name', 'Password *', 'Confirm Password *', and 'Phone *'. Below these fields is a checkbox labeled 'Disable'. Under the heading 'Default Settings', there are three dropdown menus for 'User Group *', 'Default Company *', and 'Default Price Book Group'. The right section features a large profile picture placeholder with a person icon and an 'Upload image' button with an upward arrow icon. At the top right of the form, there are 'Save' and 'Back' buttons.

This is the Add User Details screen.

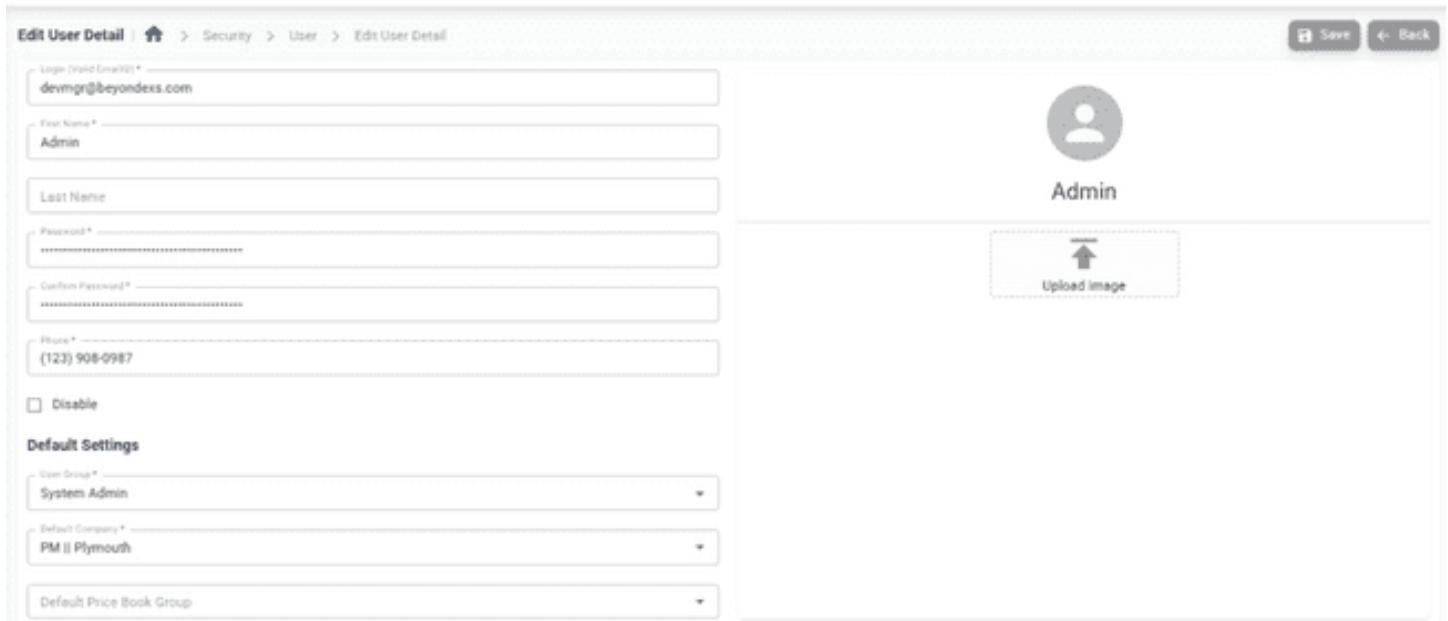
The user can add details and upload images.

By clicking Save, the data will be saved on the User screen.

Clicking the Back button will navigate to the User screen.

Edit User Detail

Security > User > Edit User Detail



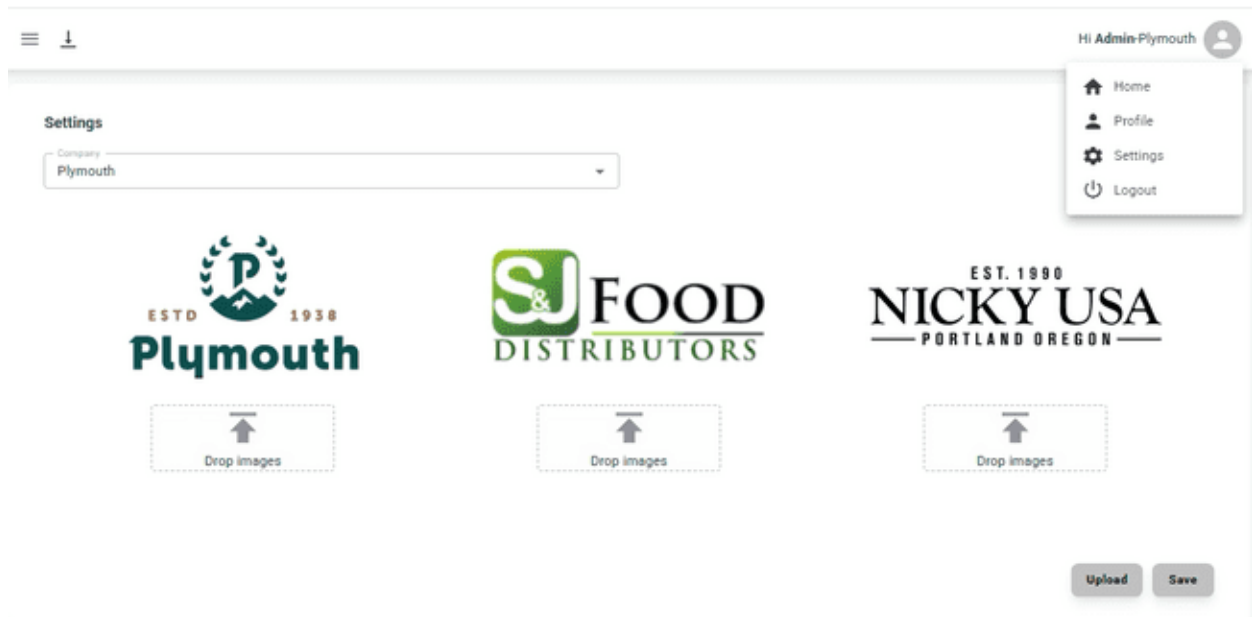
The screenshot shows the 'Edit User Detail' screen. At the top, there is a breadcrumb trail: 'Edit User Detail' > 'Security' > 'User' > 'Edit User Detail'. In the top right corner, there are two buttons: 'Save' and 'Back'. The form is divided into two main sections. The left section contains input fields for 'Login (Valid Email)' with the value 'devmgr@beyondex.com', 'First Name' with 'Admin', 'Last Name', 'Password', 'Confirm Password', 'Phone' with '(123) 908-0987', a 'Disable' checkbox, and a 'Default Settings' section with dropdown menus for 'User Group' (System Admin), 'Default Company' (PM II Plymouth), and 'Default Price Book Group'. The right section features a large circular profile picture placeholder with the text 'Admin' below it, and an 'Upload image' button with an upward arrow icon.

This is the Edit User Details screen.

On this screen, the user can edit their details. After clicking the save button, the data will be saved.

Clicking the back button will navigate to the User Screen.

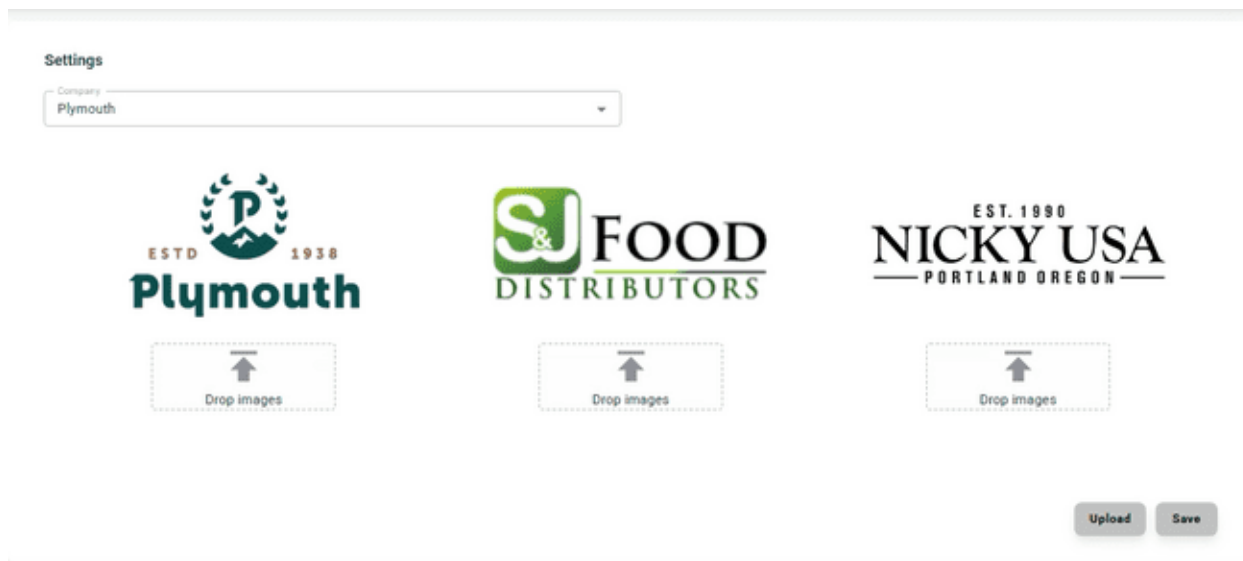
1. How to Change Company?



Click on the user icon on the right side of the navigation bar.

Then, click on **"Settings"**, and the settings screen will appear. In the **"Company"** dropdown, there are different types of companies. Select the company you want to use, then click the **"Save"** button. The selected company will be saved and will appear on the home page.

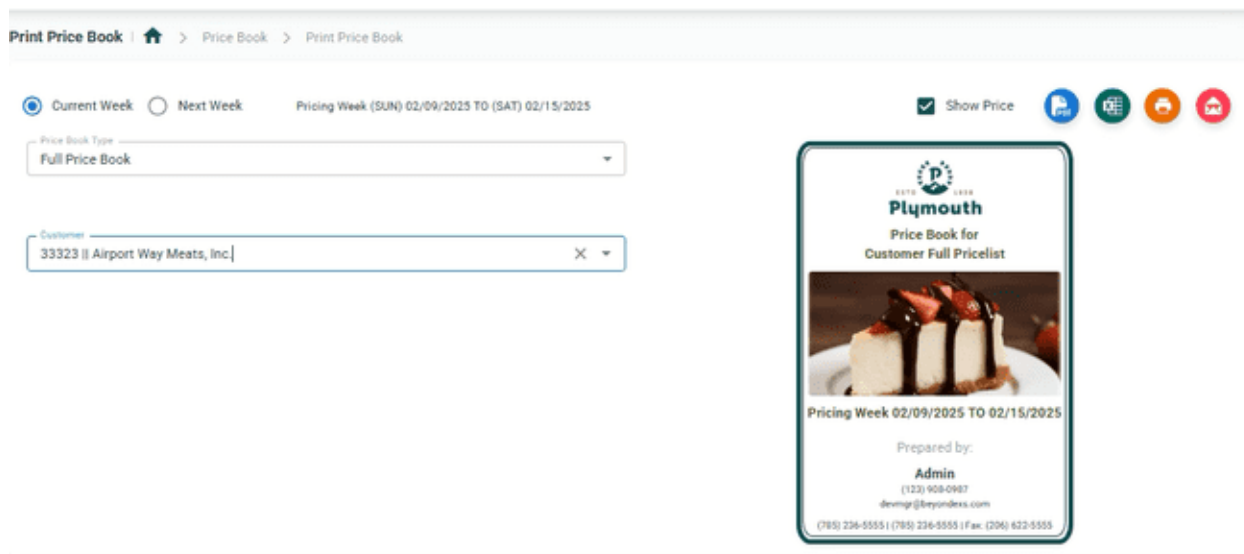
2.How to Change Company Logo for all Companies?



To change the company logo, log in to the application and click on the user icon. Then, click on "Settings," and the settings screen will appear. In the settings, there is a box called "Drop Images." Click on "Drop Images" and select the picture that corresponds to the company. After selecting the image, click "Upload." The logo will appear on the screen. Finally, click "Save," and the logo will be set for that company. The selected company and logo will be saved and will appear on the home page.

3. How to Print Company Price Book PDF and Excel?

Price Book > Print Price Book



The screenshot shows the 'Print Price Book' interface. At the top, there is a breadcrumb trail: 'Print Price Book > Price Book > Print Price Book'. Below this, there are two radio buttons for 'Current Week' (selected) and 'Next Week'. To the right, it says 'Pricing Week (SUN) 02/09/2025 TO (SAT) 02/15/2025'. There is a 'Show Price' checkbox which is checked. On the right side, there are four circular icons: a blue one with a printer symbol, a green one with a document symbol, an orange one with a download symbol, and a red one with a share symbol. Below these, there are two dropdown menus. The first is 'Price Book Type' with 'Full Price Book' selected. The second is 'Customer' with '33323 || Airport Way Meats, Inc.' selected. On the right side of the interface, there is a preview of the price book. The preview shows the Plymouth logo, the title 'Price Book for Customer Full Pricelist', a photo of a cake, the pricing week '02/09/2025 TO 02/15/2025', and contact information for 'Admin' including a phone number, email, and fax number.

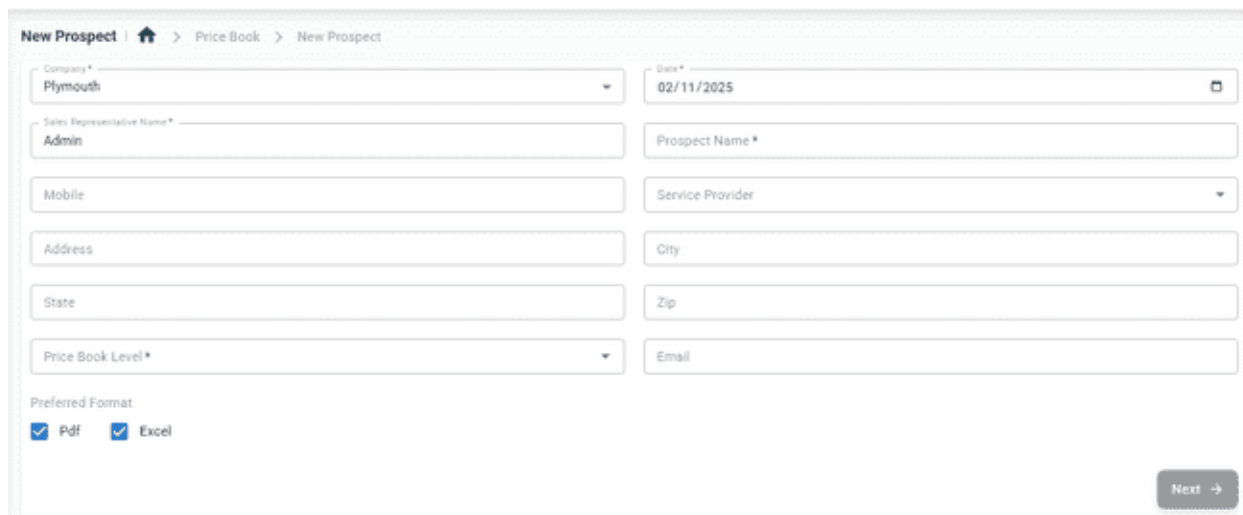
In the **Print Price Book** screen, there are two dropdowns: **Price Book Type** and **Customer**.

In the **Price Book Type** dropdown, select the desired price book type, and in the **Customer** dropdown, select the customer. The selections will be reflected in the image.

Then, click on the **PDF** icon or the **Excel** icon to print the data.

4. How to Create a New Quote?

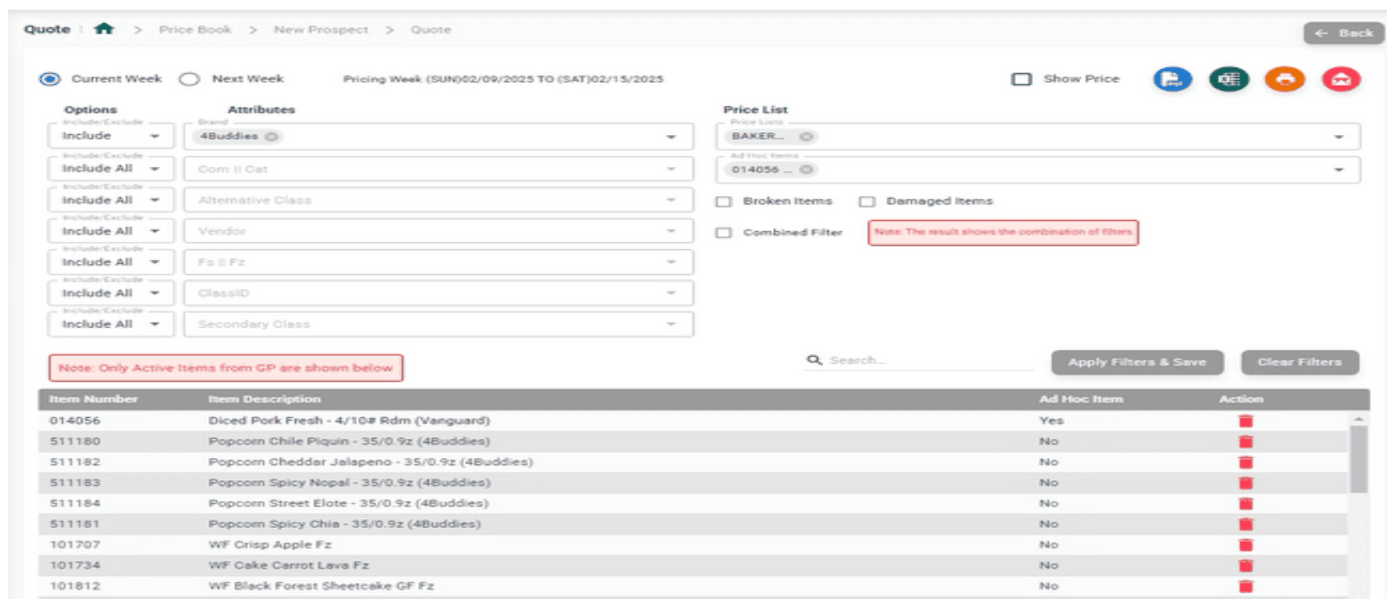
Price Book > New Prospect



To create a new quote, click on the **Price Book** menu and select **New Quote**.

Enter the details and the mandatory information in the fields. Select the required checkbox fields and click **Next**. This will navigate to the Quote screen, where you can fill in the remaining details.

Price Book > New Prospect > Quote

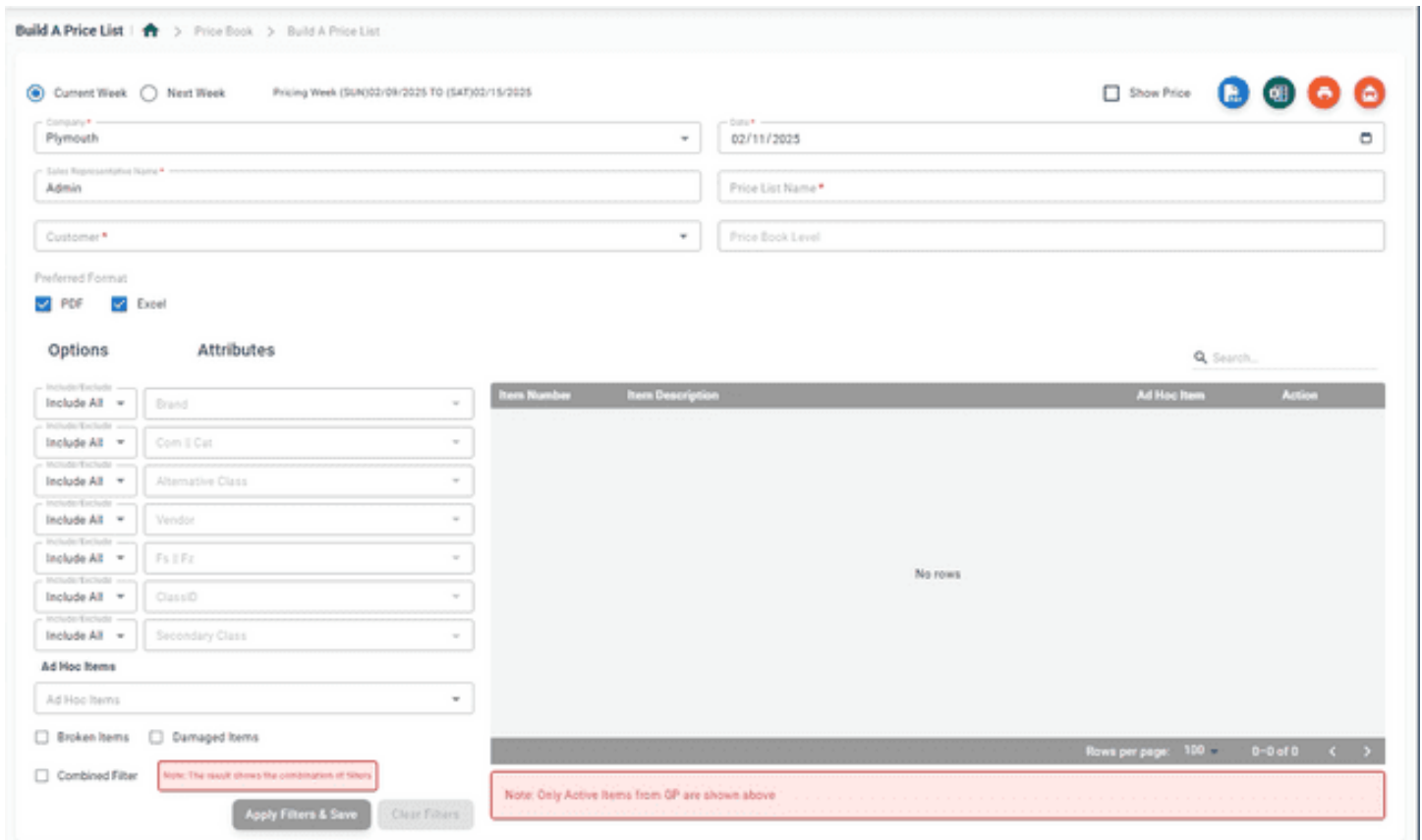


Item Number	Item Description	Ad Hoc Item	Action
014056	Diced Pork Fresh - 4/10# Rdm (Vanguard)	Yes	<input type="checkbox"/>
511180	Popcorn Chile Piquin - 35/0.9z (4Buddies)	No	<input type="checkbox"/>
511182	Popcorn Cheddar Jalapeno - 35/0.9z (4Buddies)	No	<input type="checkbox"/>
511183	Popcorn Spicy Nopal - 35/0.9z (4Buddies)	No	<input type="checkbox"/>
511184	Popcorn Street Elote - 35/0.9z (4Buddies)	No	<input type="checkbox"/>
511181	Popcorn Spicy Chia - 35/0.9z (4Buddies)	No	<input type="checkbox"/>
101707	WF Crisp Apple Fz	No	<input type="checkbox"/>
101734	WF Cake Carrot Lava Fz	No	<input type="checkbox"/>
101812	WF Black Forest Sheetcake GF Fz	No	<input type="checkbox"/>

By clicking the "Save" button, the data will be stored in the Template.

5. How to Create a Quote (Build A Price List) for Existing Customers?

Price Book > Build A Price List



In the **Price Book** menu, there is an option to **Build a Price List**. Fill in the mandatory details, and then check the boxes for **PDF** and **Excel**.

In the **Options** section, there are several choices. In the **Include All** dropdown, there are two options: **Include** and **Exclude**.

In **Attributes**, the options are **Enabling**.

Click **Save**, and the data will be saved in the templates. The selected data will then appear in the grid view.

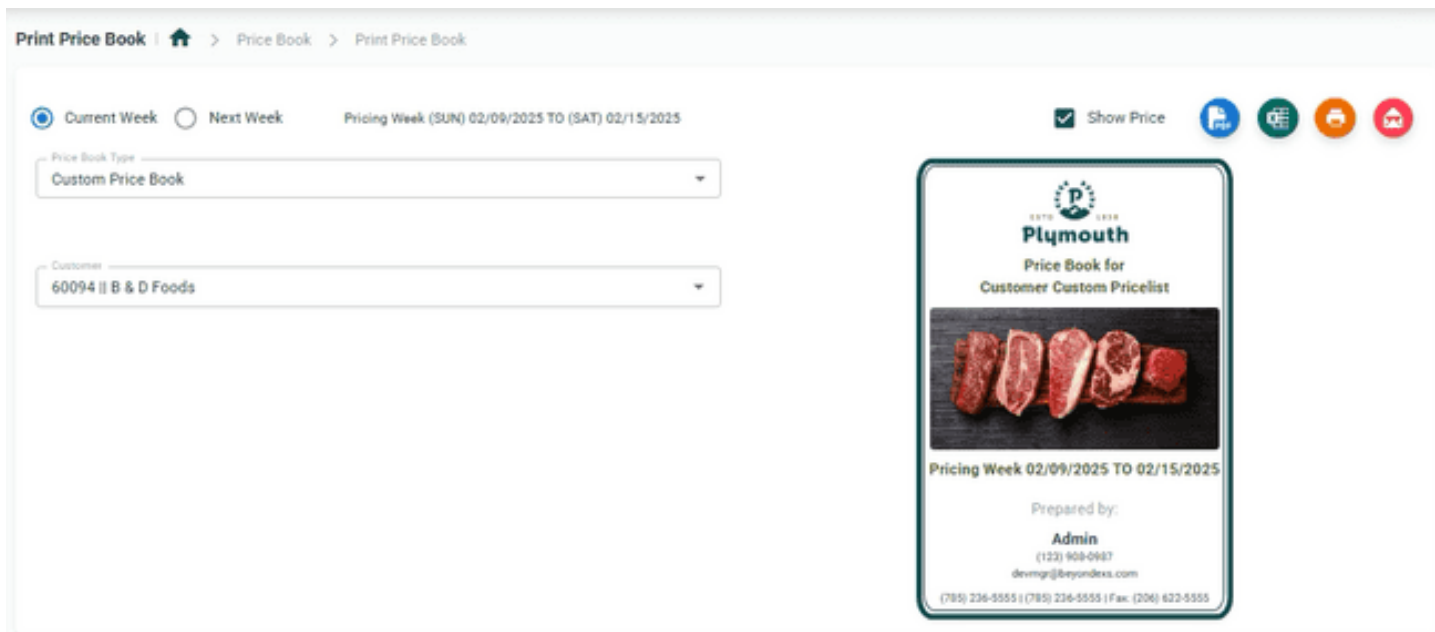
By enabling **Show Price**, the data will download with the price in **PDF Icon** and **Excel Icon** formats.

You can print the data by clicking the **Print Icon**. The customer will receive the data by mail by clicking the **Mail Icon**.

Price Book Printing Portal Manual

6. How to Send Email to Customer Full and custom Price Book?

Price Book > Print Price Book

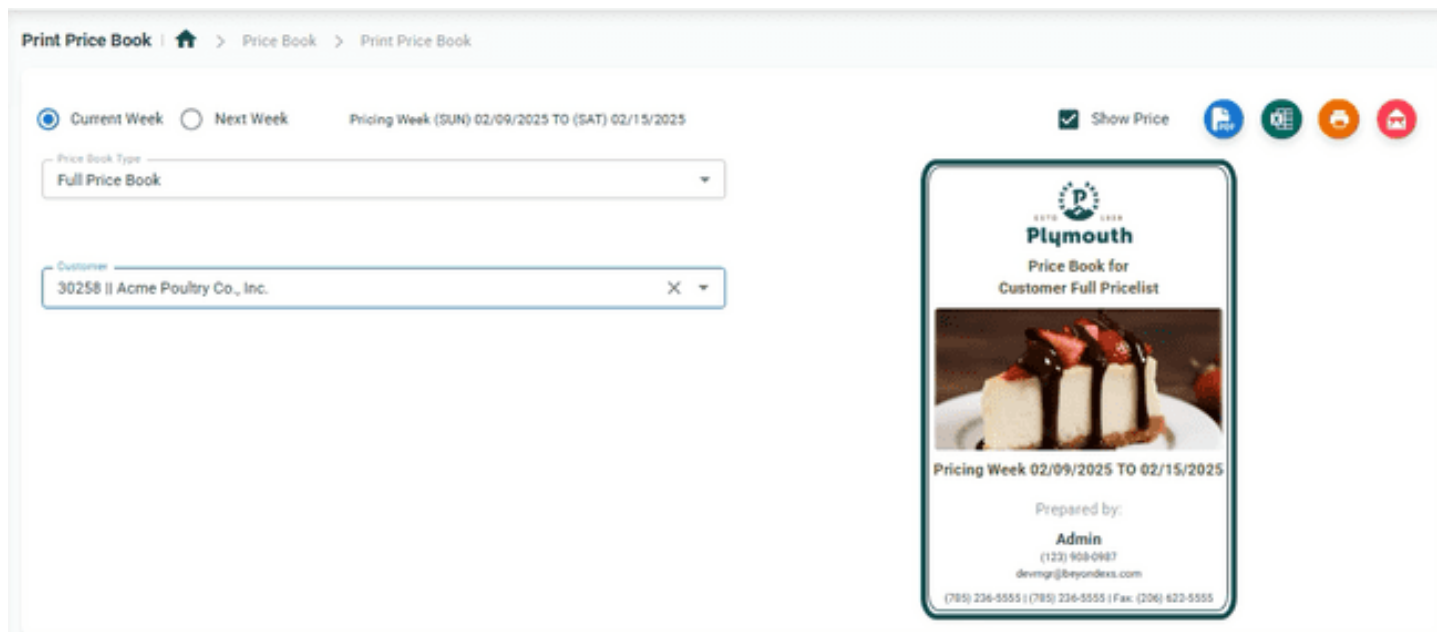


To send an email to the customer in the **Price Book**, there are two fields: **Price Book Type** and **Customer**. Click on the **Price Book Type** dropdown and fill in the field. Then, in the **Customer** dropdown, enter the data. Next, click on the **Mail** icon, and the respective customer will receive the email.

Price Book Printing Portal Manual

7. How to Print Full Or Custom Price Book for a Selected Customer?

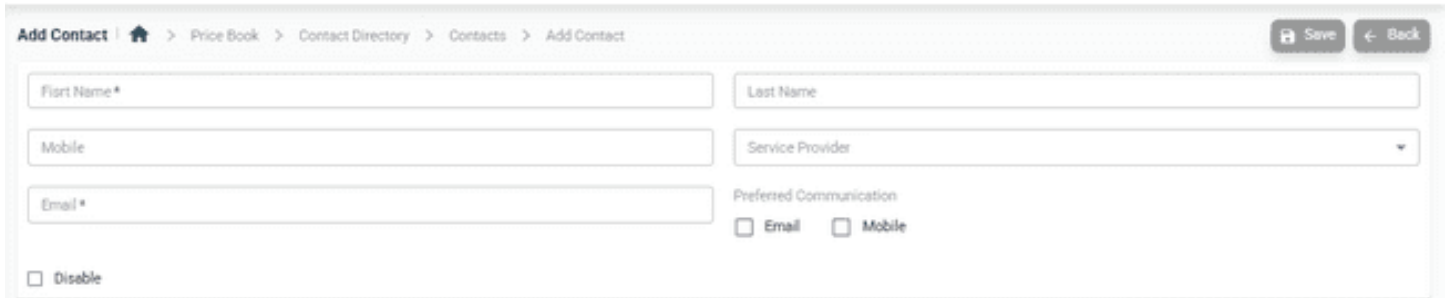
Price Book > Print Price Book



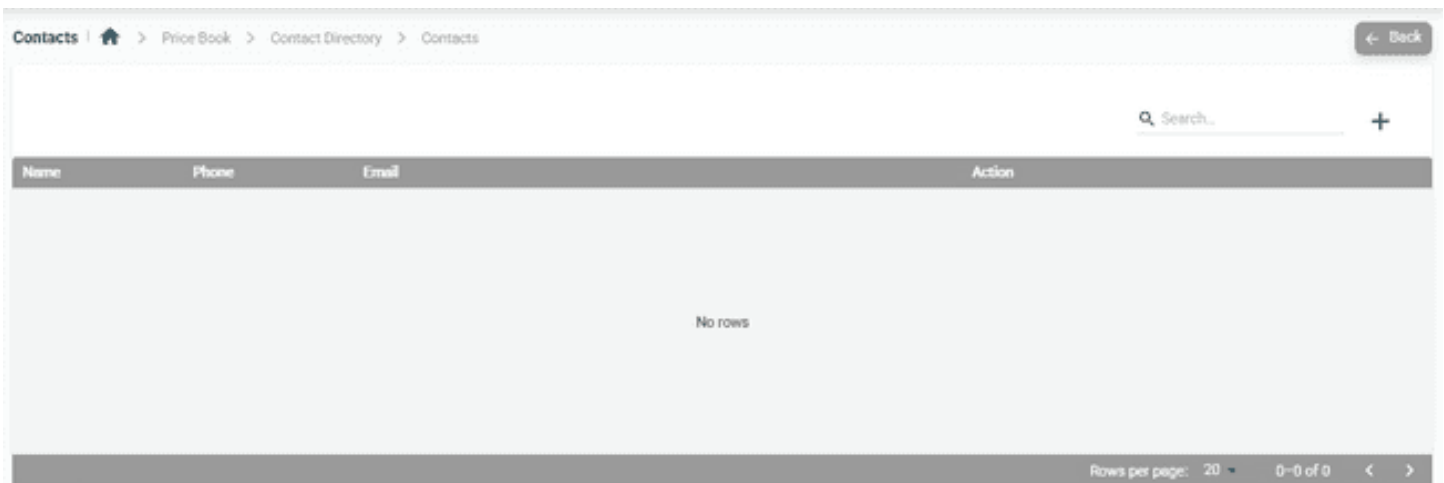
To print data for the customer in the **Price Book**, there are two fields: **Price Book Type** and **Customer**. Click on the **Price Book Type** dropdown and fill in the field. Then, in the **Customer** dropdown, enter the data. Next, click on the **Print** icon, and the respective customer's data will be available for printing.

8. How to Create, Edit and Delete Contacts for Logged in Users Price Book Group Customers?

Price Book > Contact Directory > Contacts



To create, edit, and delete contacts for logged-in users in the Price Book Group, click on the Contact Directory in the Price Book Group items. It will drop down. Click on the Customer Contact Edit icon to navigate to the contacts screen. To create a new contact, click on the Add symbol, which will navigate to the Add Contact screen. Fill in the mandatory details and click the Save button to save the data.



Name	Phone	Email	Action
No rows			

























To create, edit, and delete contacts for logged-in users in the Price Book Group, click on the Contact Directory in the Price Book Group items. It will drop down. Click on the Customer Contact Edit icon to navigate to the contacts screen. To create a new contact, click on the Add symbol, which will navigate to the Add Contact screen. Fill in the mandatory details and click the Save button to save the data. To delete the data, click on the Edit icon to edit the data, and then click the Delete icon to delete it.

9. How to Create Categories?

Control Panel >Categories

Categories | [Home](#) > [Control Panel](#) > [Categories](#)

Company: Plymouth Search... +

Category	Description	Print Sequence	Action
123	SEAFOOD	27	 
BEEF	Beef	A	 
RES1	BEEF / RES	AA	 
CHICKN	Chicken	C	 
POLL01	CHICKEN/POLLO	CA	 
HISPA1	PRODUCTOS HISPANOS	DB	 
MARIS1	SEAFOOD / MARISCOS	EA	 
MANTEC	MANTECA Y ACEITES	FA	 
LAMBVE	Lamb & Veal	G	 
PORK	Pork	I	 
SEAFO	Seafood	K	 
TURKEY	Turkey	M	 

Rows per page: 100 1-24 of 24 < >

To create a category, go to the Control Panel menu and click on the Categories List. The screen above will appear. To add a new category item in the grid view, click on the 'Add' symbol. The 'Add Categories' screen will then appear below.

Control Panel >Categories>Add Categories

Add Categories | [Home](#) > [Control Panel](#) > [Categories](#) > [Add Categories](#) Save Back

Category Name *

Category Description *

Sequence

Include Price List +

Search...

Price List Name	Price List Description	Print Group	Item Count	Action
No rows				

Rows per page: 100 0-0 of 0 < >





































To create new categories, fill in the mandatory fields and click on 'Include Price List' in the dropdown items. Then, click on the 'Add' symbol. The data will be stored in the grid view list. Finally, click 'Save' to save the data in the Categories Screen.

10.How to Create a Price List?

Control Panel > Price List

Price List | Home > Control Panel > Price List

Company: Plymouth Search...

Price List ID	Price List Description	Print Sequence	Item Count	Action
AIDELL	Aidells Sausage	OB	20	  
ARMOUR	Armour Packaged Meats	OB	14	  
AVOCAD	Frozen Avocado	RA	2	  
BACNFS	Fresh Pork - Bacon	AB	23	  
BAKERG	Baked Goods	TA	35	  
BALLPK	Ball Park	OC	0	  
BAR	Bar-S Foods	OD	15	  
BBQPFZ	Frozen Pork - BBQ Pigs	IP	17	  
BBQPK	Jin Hwa BBQ Pork	QD	2	  
BEANS	Beans	SC	1	  
BEAVR	Beaverton Foods	OE	1	  
BIGSH	Big Shoulders	OF	8	  

Rows per page: 100 1-100 of 194

To create a new price list, go to the Control Panel menu and click on 'Price List.' The screen above will appear. To create a new price list, click on the 'Add' symbol, and it will navigate to the 'Add Price List' screen.

Control Panel > Price List > Add Price List

Add Price List | Home > Control Panel > Price List > Add Price List Back

Price List Name* Price List Description* Buyer Print Sequence

Categories

Options

Include/Exclude

Include All

Include All

Include All

Include All

Include All

Include All

Include All

Include All

Broken Items

Damaged Items

Combined Filter

Note: The below shows the combination of filters

Apply Filters & Save Clear Filters

Attributes

Brand

Commodity

Alternate Class

Vendor

Fz/Fz

Secondary Class

ClassID

Ad Hoc Item

Item Number	Item Description	Print	Ad Hoc Item	Action
No rows				

Rows per page: 100 0-0 of 0

Note: Only Active Items from GP are shown above

In the 'Add Price List' screen, fill in the details in the mandatory fields. In the options, there is an 'Include All' dropdown. Click on 'Include & Exclude.' Next, click on the 'Attributes' option, enter the list that appears, and then click 'Save.' The data will be reflected in the grid view. To sort the items, you can click on the checkbox. The search bar can be used to filter the items. The data will be stored in the 'Price List' screen



Price Book Printing Portal Manual



11.How to Create a Price List Items?


12. How to Add or Remove a Price List to Categories?

Control Panel > Categories > Edit Categories

≡

↓

Hi Admin-Plymouth

Edit Categories |  > Control Panel > Categories > Edit Categories

Save

Back

Category Name *

\$23

Category Description *

SEAFOOD

Sequence


27

Include Price List

+

Search

Search...

Price List Name	Price List Description	Print Group	Item Count	Action
AIDELL	Aidells Sausage		18	

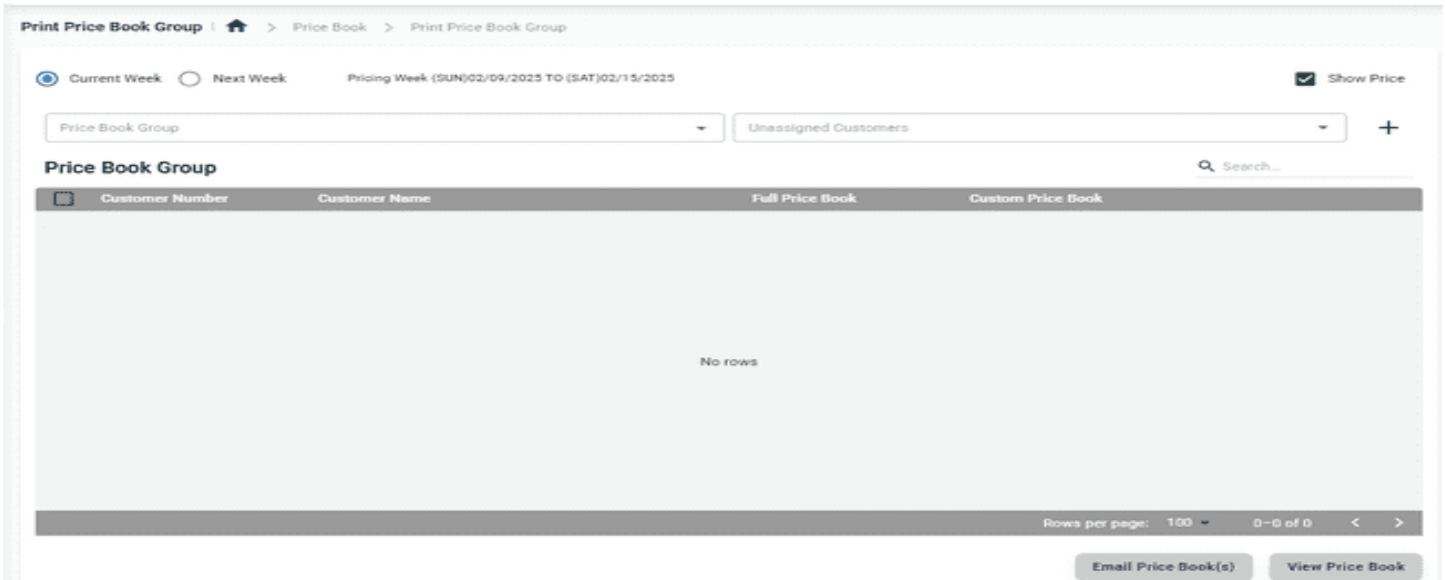
Rows per page: 100

1 - 1 of 1

< >

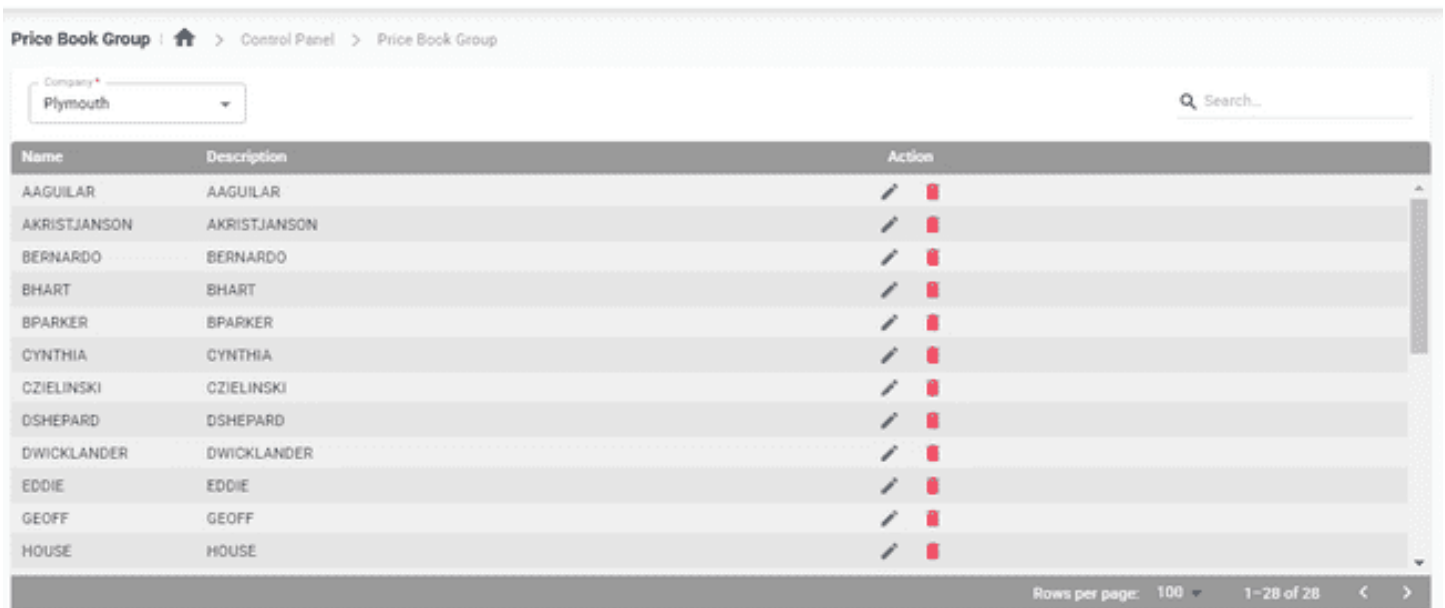
13.How to Create Price Book Group?

























Price Book > Print Price Book Group



"To create a new Price Book Group, go to the Price Book menu and click on 'Print Price Book Group List.' Fill in the details and click on the 'Add' symbol. The data will then be stored in the Price Book Group.

Control Panel > Price Book Group



Name	Description	Action
AAGUILAR	AAGUILAR	 
AKRISTJANSON	AKRISTJANSON	 
BERNARDO	BERNARDO	 
BHART	BHART	 
BPARKER	BPARKER	 
CYNTHIA	CYNTHIA	 
CZIELINSKI	CZIELINSKI	 
DSHEPARD	DSHEPARD	 
DWICKLANDER	DWICKLANDER	 
EDDIE	EDDIE	 
GEOFF	GEOFF	 
HOUSE	HOUSE	 

To view the saved data, click on the Control Panel menu, and then click on 'Price Book Group.' Next, click on the 'Edit' icon, and the saved data will be displayed.



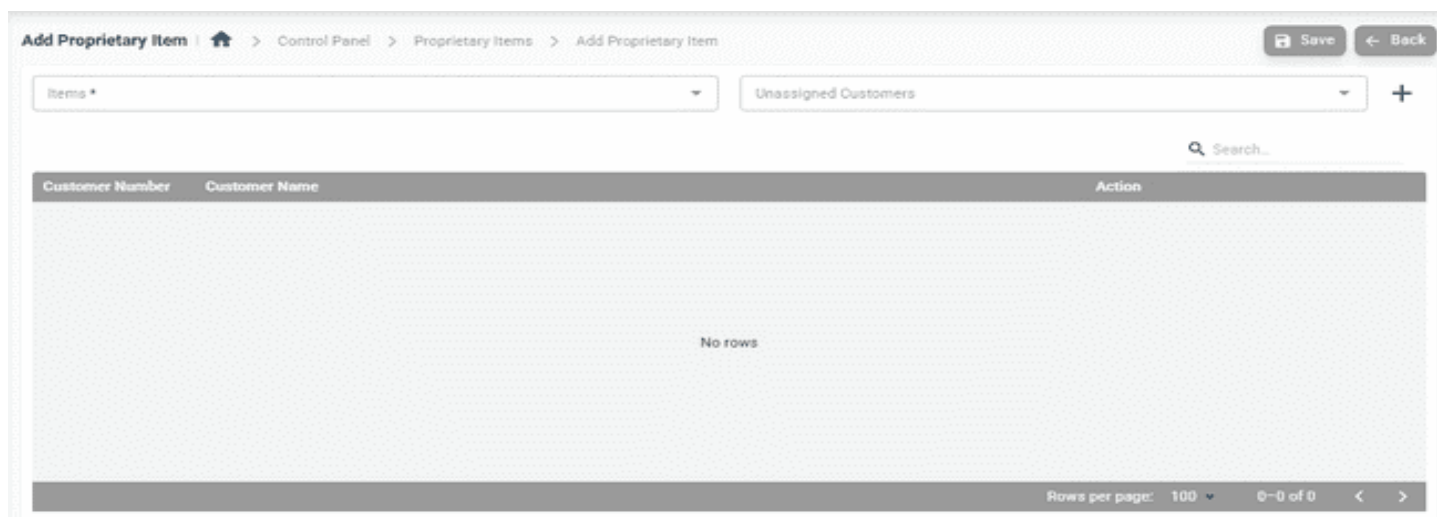
Price Book Printing Portal Manual



14. How to Assign Customers to Price Book configuration?

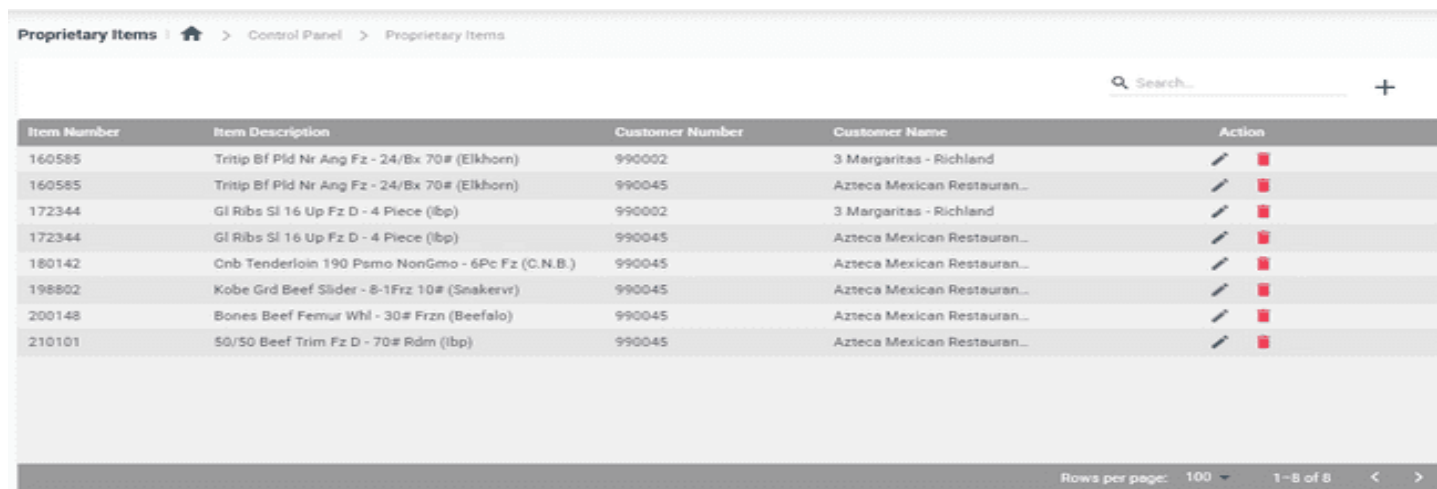
15.How to Create Proprietary Items?

















Control Panel > Proprietary Items > Add Proprietary Item



To create a new Proprietary Item, go to the Control Panel menu and click on 'Proprietary Items.' To add a new Proprietary Item, click on the 'Add' symbol. The above screen will be displayed. Fill in the data and click on the 'Add' symbol. The data will be shown in the grid view. Finally, click on the 'Save' button.

Control Panel > Proprietary





Item Number	Item Description	Customer Number	Customer Name	Action
160585	Trip Bf Pld Nr Ang Fz - 24/Bx 70# (Elkhorn)	990002	3 Margaritas - Richland	 
160585	Trip Bf Pld Nr Ang Fz - 24/Bx 70# (Elkhorn)	990045	Azteca Mexican Restauran...	 
172344	GI Ribs SI 16 Up Fz D - 4 Piece (lbp)	990002	3 Margaritas - Richland	 
172344	GI Ribs SI 16 Up Fz D - 4 Piece (lbp)	990045	Azteca Mexican Restauran...	 
180142	Onb Tenderloin 190 Psmo NonGmo - 6Pc Fz (C.N.B.)	990045	Azteca Mexican Restauran...	 
198802	Kobe Grd Beef Slider - 8-1Frz 10# (Snakervr)	990045	Azteca Mexican Restauran...	 
200148	Bones Beef Femur Whl - 30# Frzn (Beefalo)	990045	Azteca Mexican Restauran...	 
210101	50/50 Beef Trim Fz D - 70# Rdm (lbp)	990045	Azteca Mexican Restauran...	 

















By clicking the 'Add' symbol in Proprietary Items, it will navigate to the 'Add Proprietary Item' screen. Fill in the data and click on the 'Add' symbol. The data will be displayed in the grid view. After clicking 'Save,' the data will be saved in the Proprietary Items.

16.How to Add or Remove a Customers to Proprietary Items?

Control Panel > Proprietary Items

Proprietary Items  > Control Panel > Proprietary Items

Search... 

Item Number	Item Description	Customer Number	Customer Name	Action
160585	Tritip Bf Pld Nr Ang Fz - 24/Bx 70# (Elkhorn)	990002	3 Margaritas - Richland	 
160585	Tritip Bf Pld Nr Ang Fz - 24/Bx 70# (Elkhorn)	990045	Azteca Mexican Restauran...	 
172344	Gl Ribs Sl 16 Up Fz D - 4 Piece (lbp)	990002	3 Margaritas - Richland	 
172344	Gl Ribs Sl 16 Up Fz D - 4 Piece (lbp)	990045	Azteca Mexican Restauran...	 
180142	Cnb Tenderloin 190 Psmo NonGmo - 6Pc Fz (C.N.B.)	990045	Azteca Mexican Restauran...	 
198802	Kobe Grd Beef Slider - 8-1Frz 10# (Snakervi)	990045	Azteca Mexican Restauran...	 
200148	Bones Beef Femur Whl - 30# Frzn (Beefalo)	990045	Azteca Mexican Restauran...	 
210101	50/50 Beef Trim Fz D - 70# Rdm (lbp)	990045	Azteca Mexican Restauran...	 

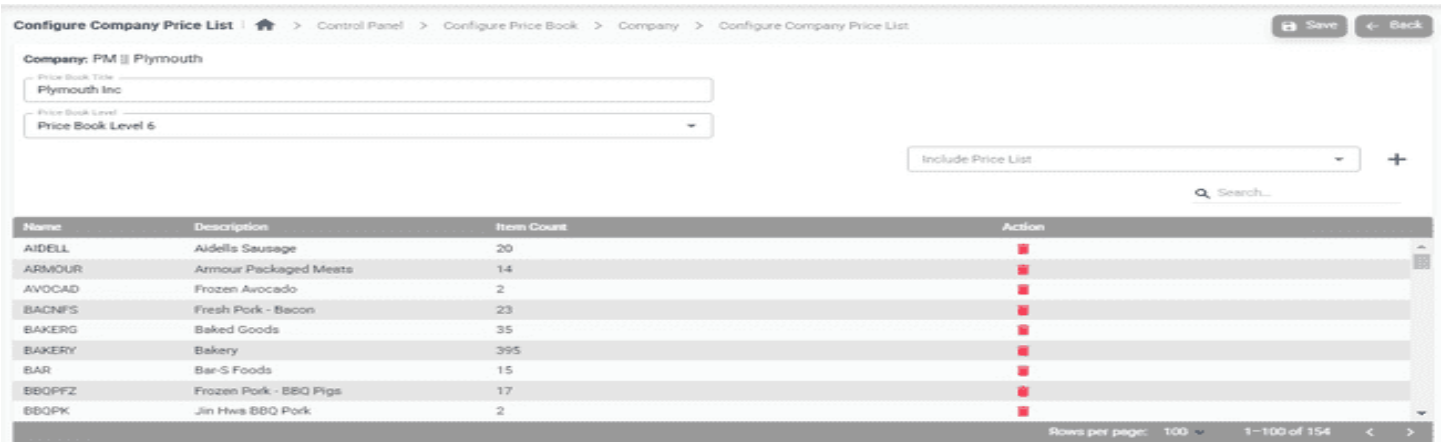
Rows per page: 100 1-8 of 8 < >

To add a new customer to the Proprietary Items, click on the 'Add' symbol. It will navigate to the 'Add Proprietary Item' screen. Fill in the details and click 'Save.' The data will be saved in Proprietary Items.

To remove a customer from Proprietary Items, click on the 'Delete' icon, and the customer will be deleted.

17.How to Configure Price Book for a Customer?

Control Panel > Configure Price Book > Company > Configure Company Price List



The screenshot shows the 'Configure Company Price List' interface. At the top, there is a breadcrumb trail: 'Control Panel > Configure Price Book > Company > Configure Company Price List'. Below this, the 'Company' is set to 'PIM :: Plymouth'. There are input fields for 'Price Book Title' (containing 'Plymouth Inc') and 'Price Book Level' (set to 'Price Book Level 6'). A search bar with a magnifying glass icon and the text 'Search...' is present. A dropdown menu labeled 'Include Price List' with a plus sign is also visible. The main part of the interface is a table with the following data:


Name	Description	Item Count	Action
AIDELL	Aidells Sausage	20	[Red Square]
ARMOUR	Armour Packaged Meats	14	[Red Square]
AVOCAD	Frozen Avocado	2	[Red Square]
BACNFS	Fresh Pork - Bacon	23	[Red Square]
BAKERG	Baked Goods	35	[Red Square]
BAKERY	Bakery	395	[Red Square]
BAR	Bar-S Foods	15	[Red Square]
BBQFZ	Frozen Pork - BBQ Pigs	17	[Red Square]
BBQPK	Jin Hwa BBQ Pork	2	[Red Square]



At the bottom right of the table, there is a pagination control showing 'Rows per page: 100' and '1-100 of 154'.

To configure the price book for a customer, click on the Control Panel menu, then select 'Configure Price Book.' In the Company Screen grid view, click on the 'Edit' icon. It will navigate to the 'Configure Company Price List' screen. In the dropdown, a list of items will appear. Click on the selected item, and by clicking the 'Add' symbol, it will be added to the grid view.

18. How to Add or Remove Price List for a Company?

Control Panel > Configure Price Book > Company > Configure Company Price List


Configure Company Price List |  > Control Panel > Configure Price Book > Company > Configure Company Price List


 Save
 Back










Company: PM || Plymouth



Price Book Title
Plymouth Inc

Price Book Level
Price Book Level 6

Include Price List


 Search...

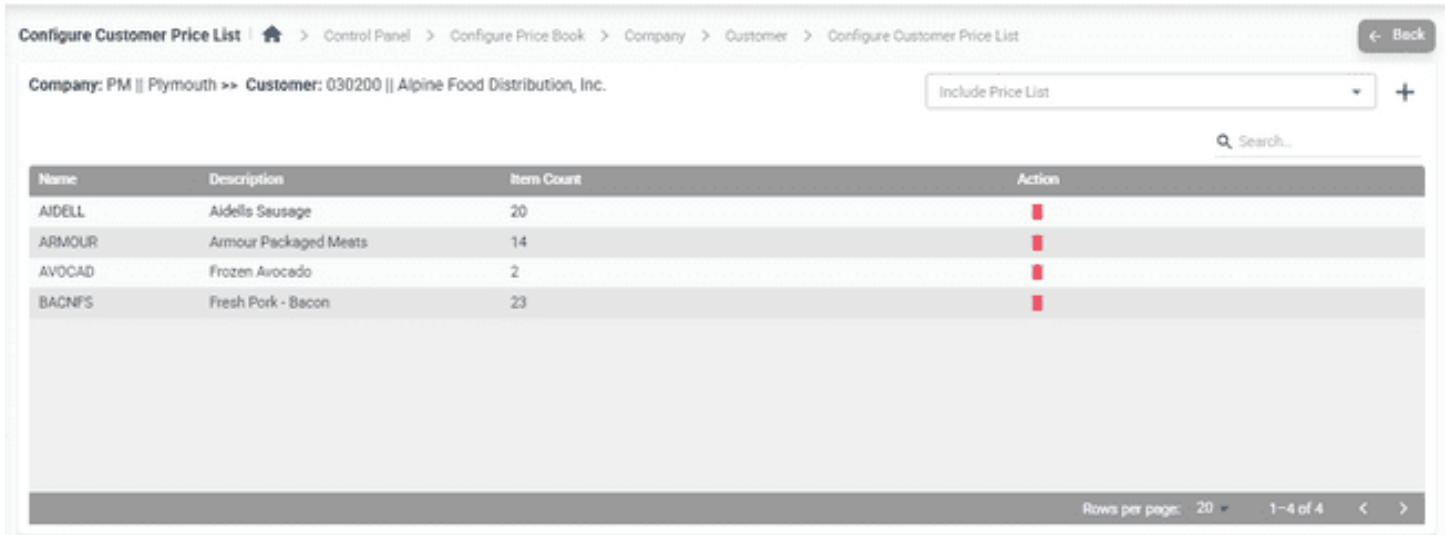
Name	Description	Item Count	Action
AIDELL	Aidells Sausage	20	
ARMOUR	Armour Packaged Meats	14	
AVOCAD	Frozen Avocado	2	
BACNFS	Fresh Pork - Bacon	23	
BAKERG	Baked Goods	35	
BAKERY	Bakery	395	
BAR	Bar-S Foods	15	
BBQPFZ	Frozen Pork - BBQ Pigs	17	
BBQPK	Jin Hwa BBQ Pork	2	





Rows per page: 100
1 - 100 of 155



To add or remove a price list for a company, click on the Control Panel menu and then select 'Configure Price Book.' The Company screen will appear. In this screen, click on the 'Edit Configure Company Price List' icon, and the above screen will appear. To add a price list, click on 'Include Price List.' In the item dropdown, the items will appear, and by clicking the 'Add' symbol, the name will be added to the grid view.

19.How to Add or Remove Price List for a Customer?

Control Panel > Configure Price Book > Company > Customer > Configure Customer Price List

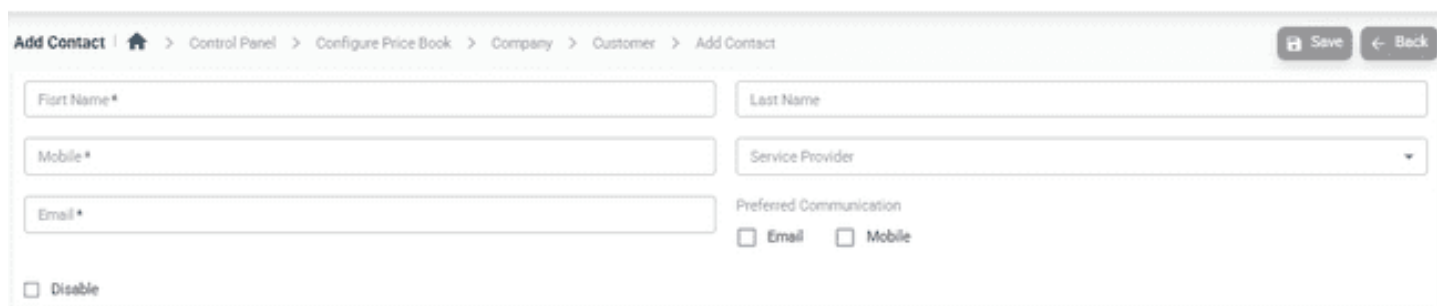


Name	Description	Item Count	Action
AIDELL	Aidells Sausage	20	
ARMOUR	Armour Packaged Meats	14	
AVOCAD	Frozen Avocado	2	
BACNFS	Fresh Pork - Bacon	23	

To add or remove a price list for a customer, click on the Control Panel menu, then select 'Configure Price Book.' In the grid view, click on the 'Customer Price Book' icon. This will navigate to the 'Customer Screen.' In the list view, click on the 'Price List' icon, which will navigate to the 'Configure Customer Price List' screen. In the dropdown, select the items and click on the 'Add' symbol to save the data to the grid view. To delete the data, click on the 'Delete' icon to remove the data.

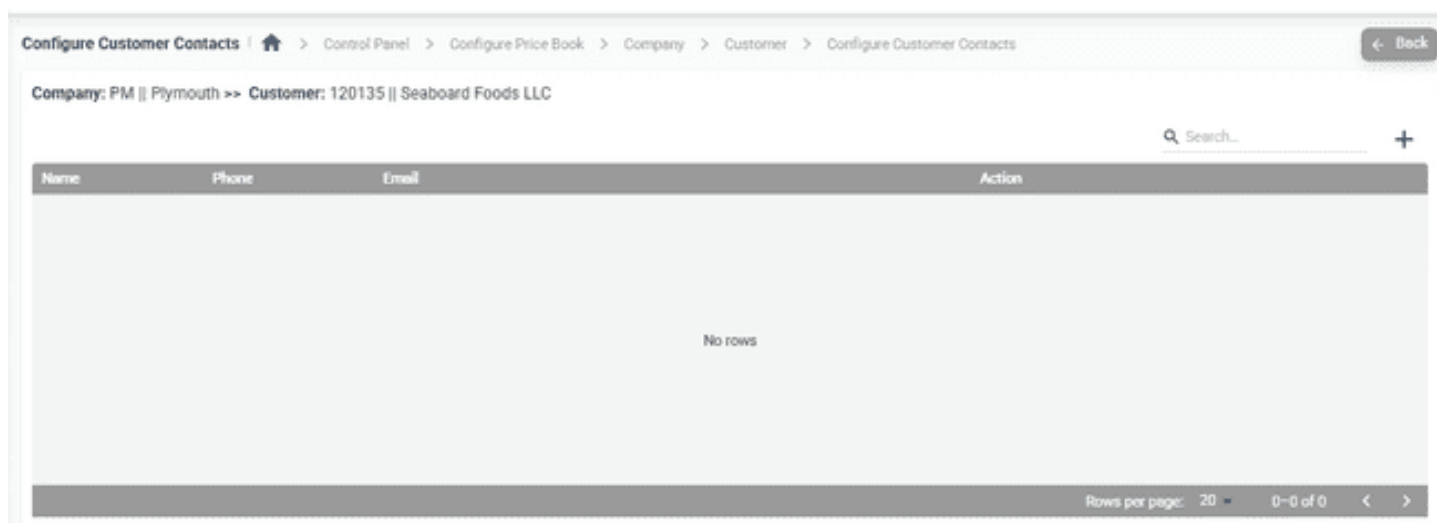
20.How to Add or Remove Contacts for a Customer?

Control Panel > Configure Price Book > Company > Customer > Add Contact



To add or remove contacts for a customer, click on the Control Panel menu, then select 'Configure Price Book.' In the grid view, click on the 'Customer Price Book' icon. This will navigate to the 'Company Screen.' In the grid view, click on the 'Contact' icon, which will navigate to the 'Configure Customer Contacts' screen. To add a contact, click on the 'Add' symbol. It will navigate to the 'Add Contact' screen, where you can fill in the mandatory details and click the 'Save' button to save the data.

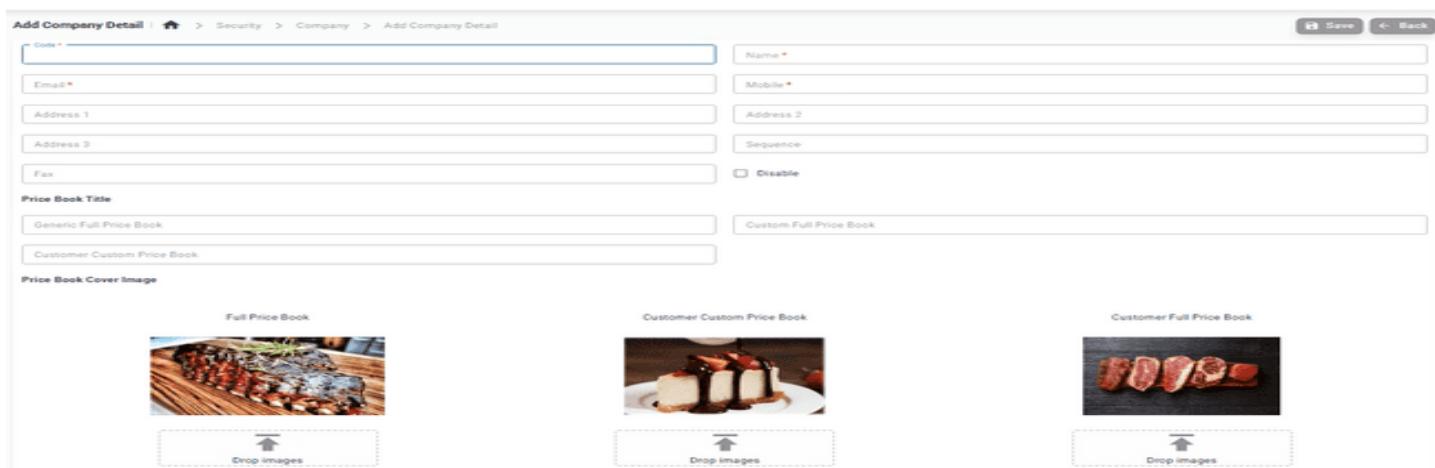
Control Panel > Configure Price Book > Company > Customer >Configure Customer Contacts



To add or remove contacts for a customer, click on the Control Panel menu, then select 'Configure Price Book.' In the grid view, click on the 'Customer Price Book' icon. This will navigate to the 'Company Screen.' In the grid view, click on the 'Contact' icon, which will navigate to the 'Configure Customer Contacts' screen. To add a contact, click on the 'Add' symbol. It will navigate to the 'Add Contact' screen, where you can fill in the mandatory details and click the 'Save' button to save the data. After saving, it will return to the 'Configure Customer Contacts' grid view. To delete a contact, click on the 'Delete' icon, and the contact will be deleted.

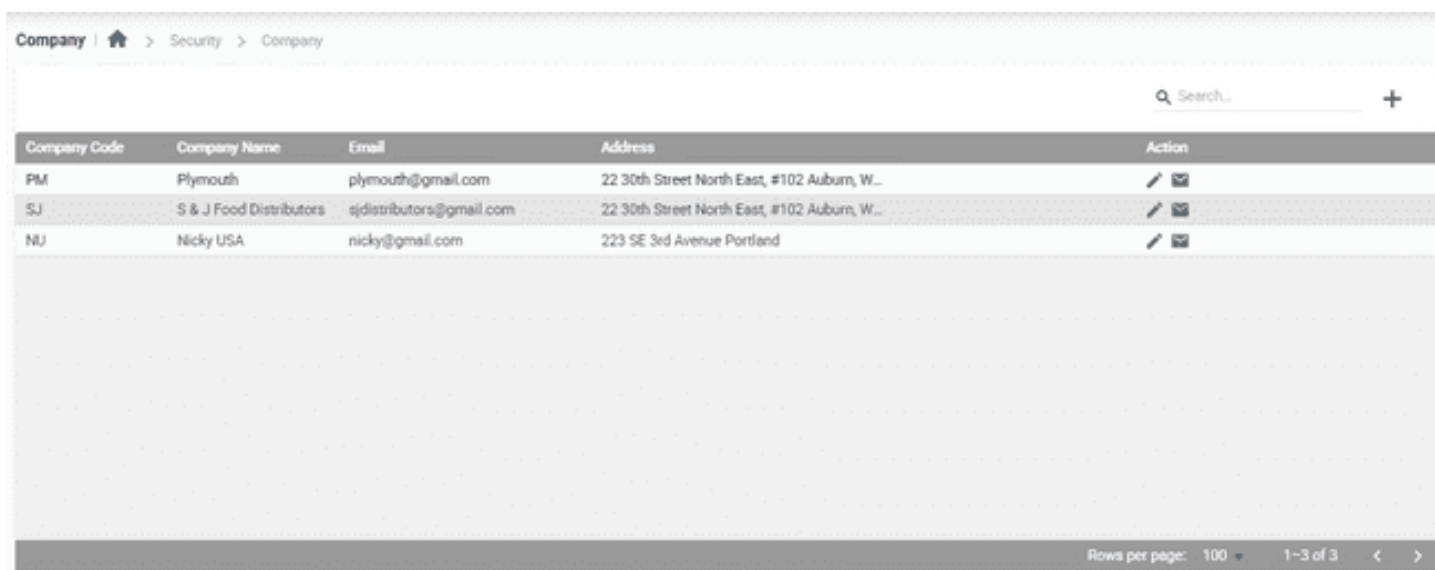
21. How to Create a Company?







Security > Company > Add Company Detail



To create a new company, click on the 'Security' menu, then select 'Company.' Click the 'Add' symbol, and it will navigate to the 'Add Company Details' screen. Fill in the mandatory details, and by clicking 'Drop Images,' new images will be uploaded. Finally, click the 'Save' button to save the data.

Security > Company

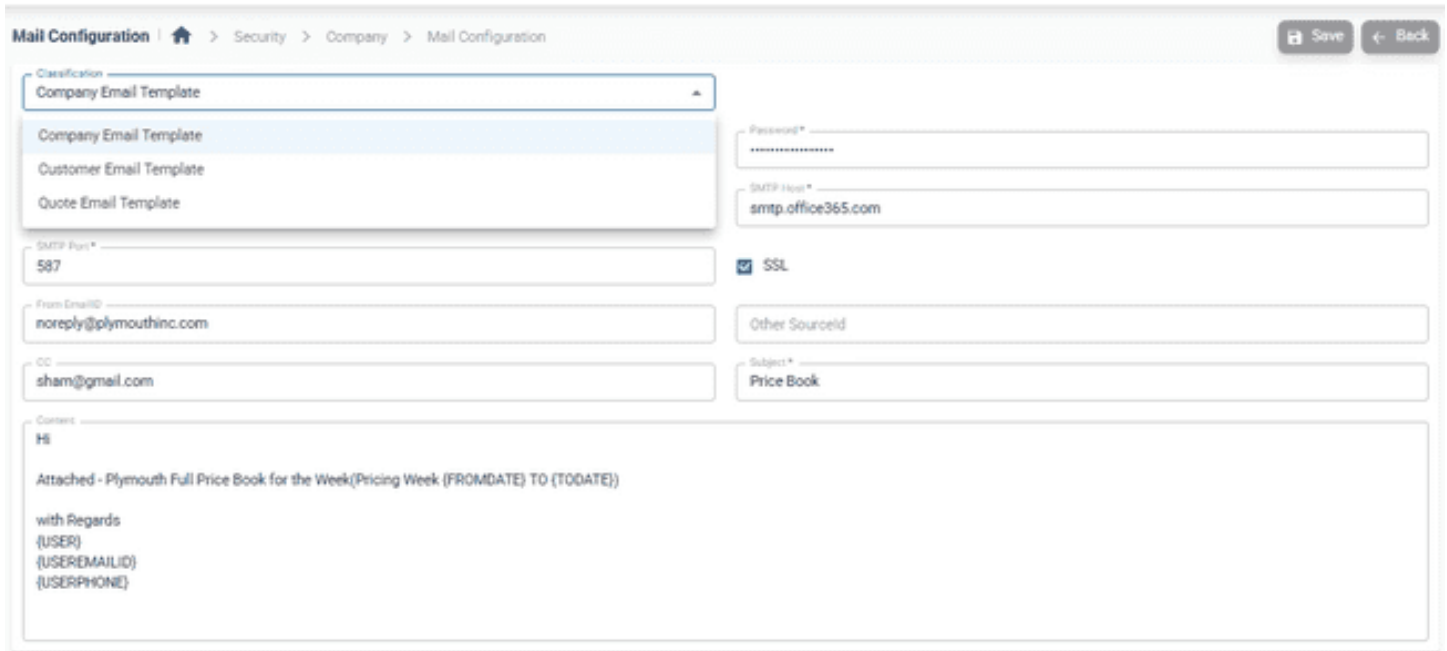


Company Code	Company Name	Email	Address	Action
PM	Plymouth	plymouth@gmail.com	22 30th Street North East, #102 Auburn, W...	 
SJ	S & J Food Distributors	sjdistributors@gmail.com	22 30th Street North East, #102 Auburn, W...	 
NU	Nicky USA	nicky@gmail.com	223 SE 3rd Avenue Portland	 

By clicking the 'Add' symbol, it will navigate to the 'Add Company Details' screen. Fill in the details and click the 'Save' button to save the data.

22.How to Configure a Email Configuration for Company, Customer and Quotation wise

Security > Company > Mail Configuration



Mail Configuration | Home > Security > Company > Mail Configuration

Classification
Company Email Template

Company Email Template
Customer Email Template
Quote Email Template

Password*

SMTP Host*
smtp.office365.com

SMTP Port*
587

From EmailID*
noreply@plymouthinc.com

CC*
sham@gmail.com

Other SourceId

Subject*
Price Book

Content
Hi

Attached - Plymouth Full Price Book for the Week(Pricing Week (FROMDATE) TO (TODATE))

with Regards
{USER}
{USEREMAILID}
{USERPHONE}

To configure email settings for the company, customer, and quotation, click on the Security menu, then select 'Company List.' In the grid view, click on 'Mail Config.' It will navigate to the 'Mail Configuration' screen, where different types of email templates are available in the 'Classification' dropdown. Select the desired template, then click the 'Save' button to save the data.

Price Book Printing Portal Manual

23.How to Enable or Disable the Menus for User Access Based?

Security > Menu

Menu | [Home](#) > Security > Menu

Search...

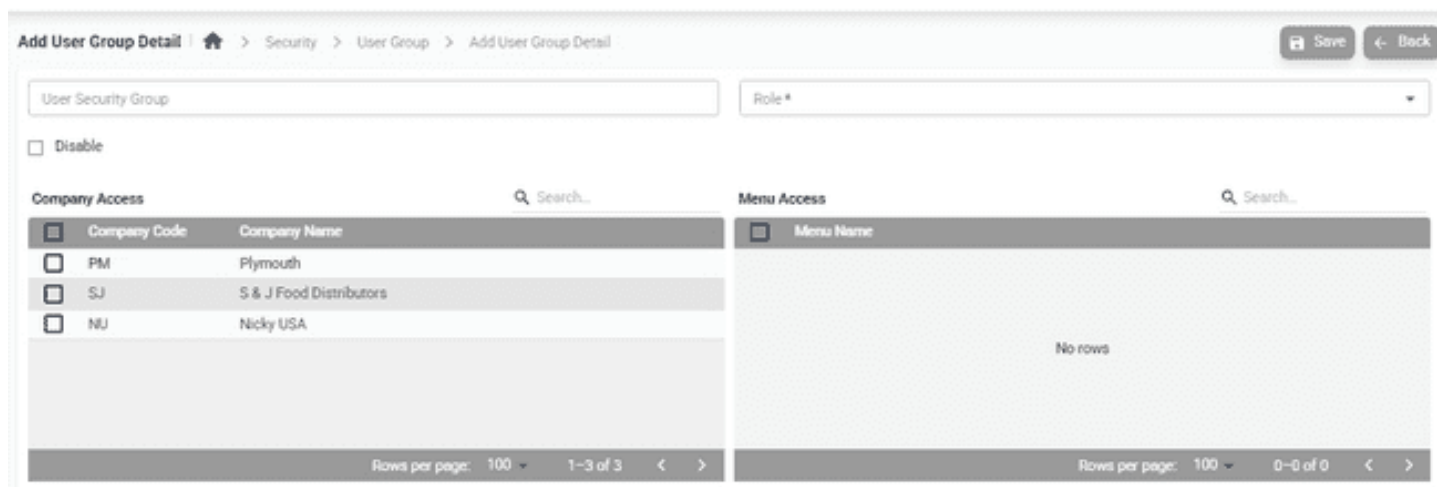
Menu Name	Action		
Print Price Book	<input checked="" type="checkbox"/> System Admin	<input checked="" type="checkbox"/> Admin	<input checked="" type="checkbox"/> User
Print Price Book Group	<input checked="" type="checkbox"/> System Admin	<input checked="" type="checkbox"/> Admin	<input checked="" type="checkbox"/> User
New Quote	<input checked="" type="checkbox"/> System Admin	<input checked="" type="checkbox"/> Admin	<input checked="" type="checkbox"/> User
Templates	<input checked="" type="checkbox"/> System Admin	<input checked="" type="checkbox"/> Admin	<input checked="" type="checkbox"/> User
Items	<input type="checkbox"/> System Admin	<input type="checkbox"/> Admin	<input type="checkbox"/> User
Price List	<input checked="" type="checkbox"/> System Admin	<input checked="" type="checkbox"/> Admin	<input type="checkbox"/> User
Price Book Categories	<input checked="" type="checkbox"/> System Admin	<input checked="" type="checkbox"/> Admin	<input type="checkbox"/> User
Price Book Group	<input checked="" type="checkbox"/> System Admin	<input checked="" type="checkbox"/> Admin	<input type="checkbox"/> User
Configure Price Book	<input checked="" type="checkbox"/> System Admin	<input checked="" type="checkbox"/> Admin	<input type="checkbox"/> User
Company	<input checked="" type="checkbox"/> System Admin	<input type="checkbox"/> Admin	<input type="checkbox"/> User
Menu	<input checked="" type="checkbox"/> System Admin	<input type="checkbox"/> Admin	<input type="checkbox"/> User
User Group	<input checked="" type="checkbox"/> System Admin	<input type="checkbox"/> Admin	<input type="checkbox"/> User

Rows per page: 100 1-17 of 17

In the Security menu, there is a list. Click on the 'Menu List,' and this screen will open. In this screen, the user can enable or disable access to the menus as needed.

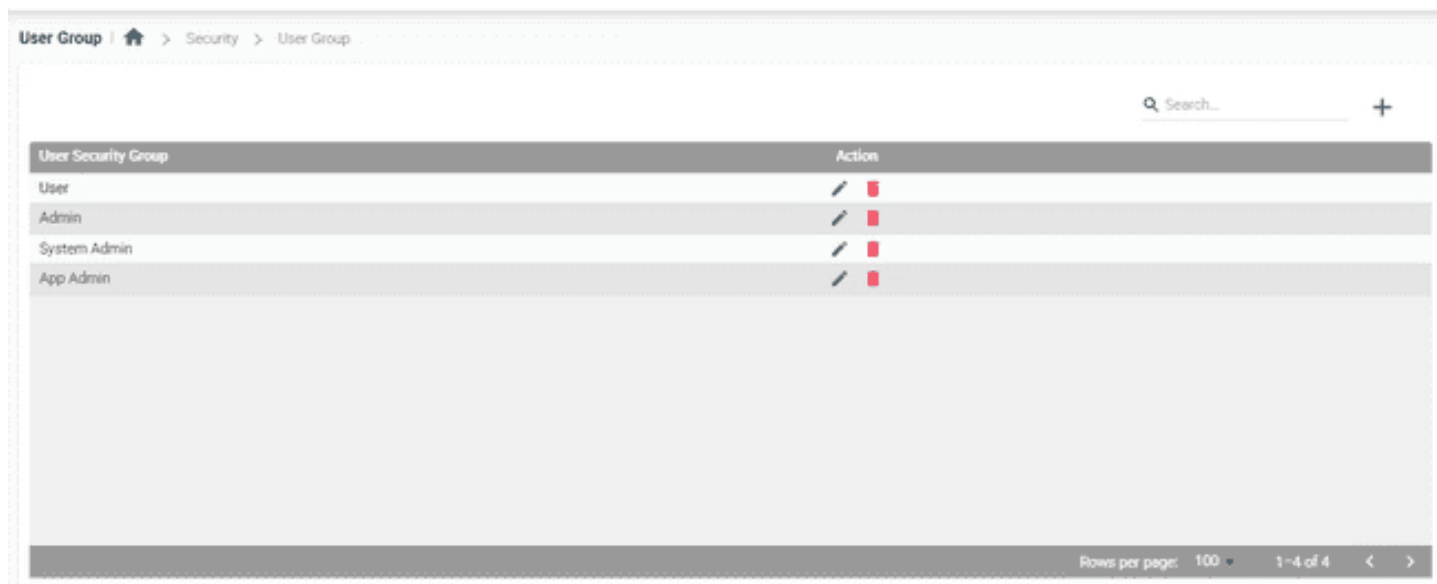
24.How to Create a User Group?

Security > User Group > Add User Group Detail



To create a new user group, click on the Security menu, then select 'User Group List.' The User Group screen will appear. To add a new user group, click on the 'Add' symbol, and the screen will appear. Fill in the data, enable the necessary menu access under 'Menu Access,' and then click the 'Save' button to save the data.

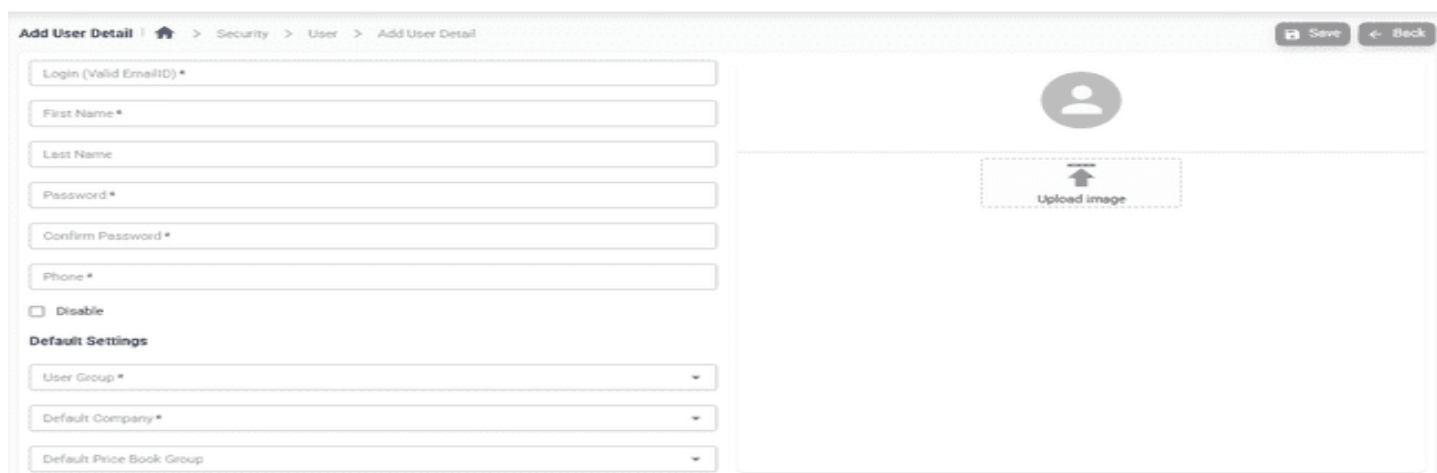
Security > User Group



To add a new user group, click on the 'Add' symbol. It will navigate to the 'Add User Group Details' screen. Fill in the data and click the 'Save' button to save the information. The data will then be saved in the User Group screen.

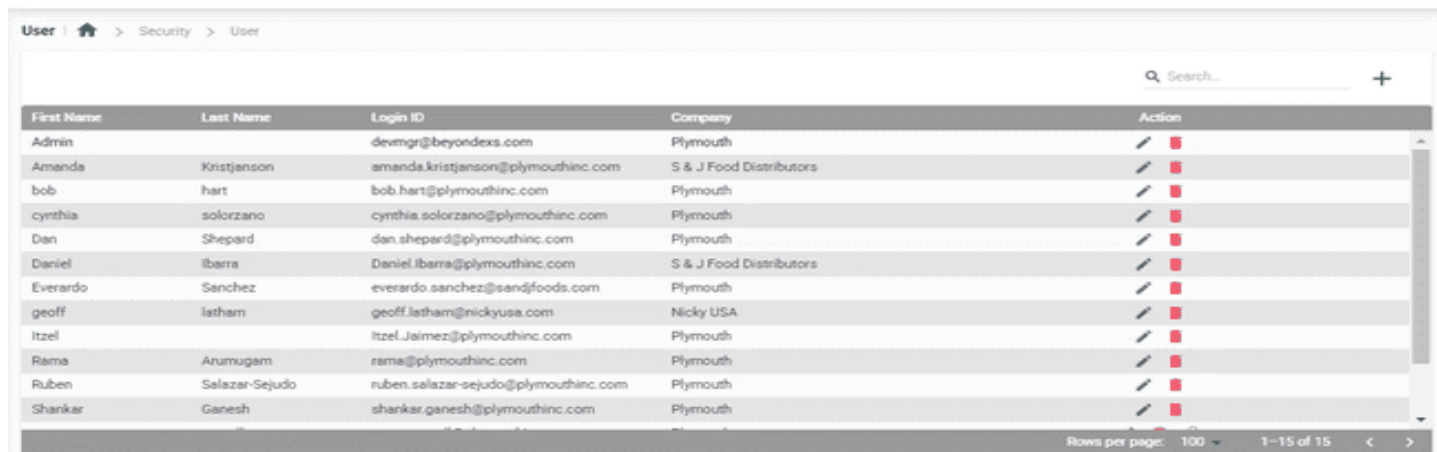
25.How to Create a User?

























Security > User > Add User Detail



To create a new user, click on the Security menu, then select 'User List.' To add a new user, click on the 'Add' symbol, and it will navigate to the 'Add User Details' screen. Fill in the mandatory details, upload the image if needed, and click the 'Save' button to save the data.

Security > User



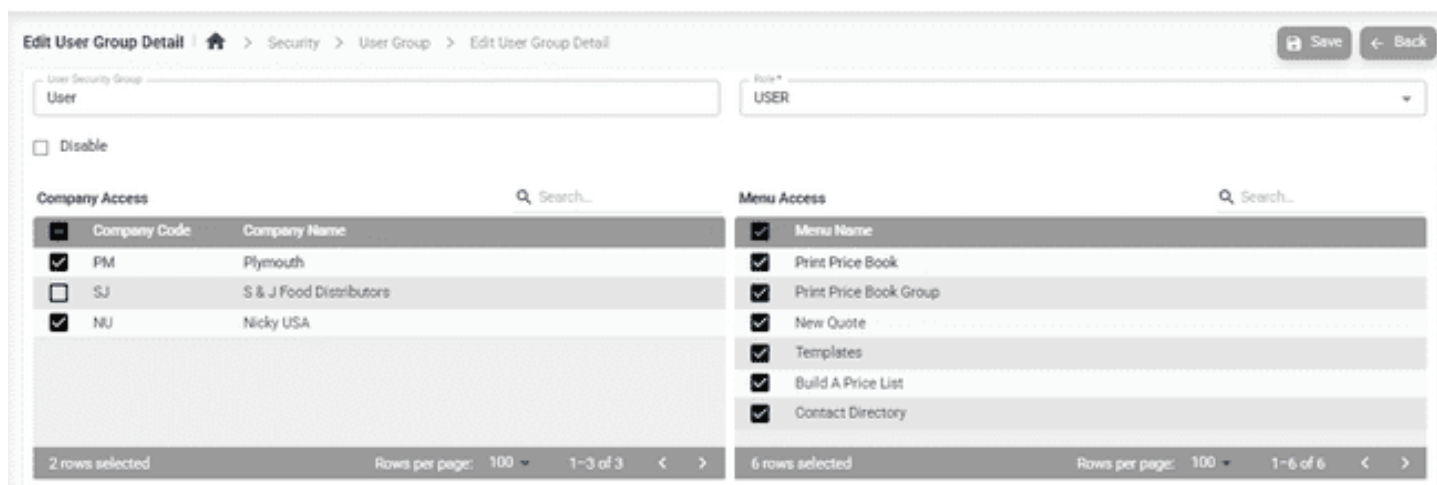
First Name	Last Name	Login ID	Company	Action
Admin		devmgr@beyondexs.com	Plymouth	 
Amanda	Kristjanson	amanda.kristjanson@plymouthinc.com	S & J Food Distributors	 
bob	hart	bob.hart@plymouthinc.com	Plymouth	 
cynthia	solorzano	cynthia.solorzano@plymouthinc.com	Plymouth	 
Dan	Shepard	dan.shepard@plymouthinc.com	Plymouth	 
Daniel	Ibarra	daniel.ibarra@plymouthinc.com	S & J Food Distributors	 
Everardo	Sanchez	everardo.sanchez@sandjfoods.com	Plymouth	 
geoff	latham	geoff.latham@nickysa.com	Nicky USA	 
Itzel		itzel.jalmez@plymouthinc.com	Plymouth	 
Rama	Anumugam	rama@plymouthinc.com	Plymouth	 
Ruben	Salazar-Sejudo	ruben.salazar-sejudo@plymouthinc.com	Plymouth	 
Shankar	Ganesh	shankar.ganesh@plymouthinc.com	Plymouth	 

To add a new user to the grid list, click on the 'Add' symbol. It will navigate to the 'Add User Details' screen. Fill in the details and click the 'Save' button. The data will then be saved in the User screen.

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26.How to Assign Company Access to selected User Group?

Security > User Group > Edit User Group Detail



Edit User Group Detail | Home > Security > User Group > Edit User Group Detail

Save Back

User Security Group: User Role: USER

☐ Disable

Company Access

Search...

<input checked="" type="checkbox"/>	Company Code	Company Name
<input checked="" type="checkbox"/>	PM	Plymouth
<input type="checkbox"/>	SJ	S & J Food Distributors
<input checked="" type="checkbox"/>	NU	Nicky USA

2 rows selected Rows per page: 100 1-3 of 3

Menu Access

Search...

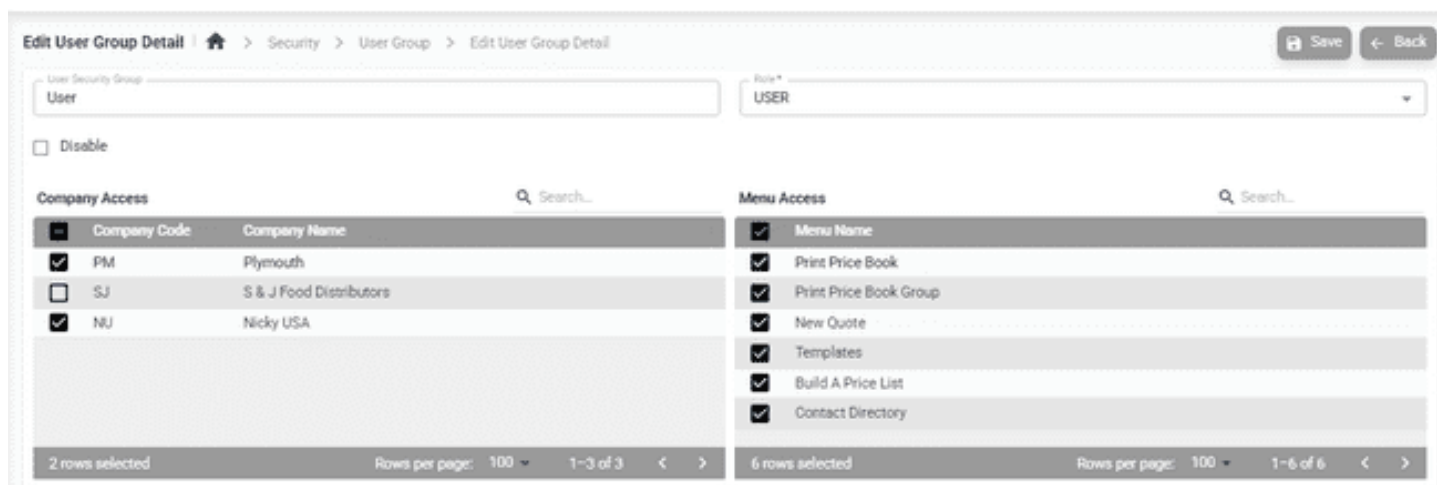
<input checked="" type="checkbox"/>	Menu Name
<input checked="" type="checkbox"/>	Print Price Book
<input checked="" type="checkbox"/>	Print Price Book Group
<input checked="" type="checkbox"/>	New Quote
<input checked="" type="checkbox"/>	Templates
<input checked="" type="checkbox"/>	Build A Price List
<input checked="" type="checkbox"/>	Contact Directory

6 rows selected Rows per page: 100 1-6 of 6

"To assign a menu to a user, click on the Security menu, then select 'User Group.' In the grid view, click on the 'Edit' icon. It will navigate to the 'Edit User Group Details' screen, where the user can grant 'Company Access' by clicking the checkboxes as needed. Click the 'Save' button to save the data.

27.How to Assign Menu Rights to Selected user?

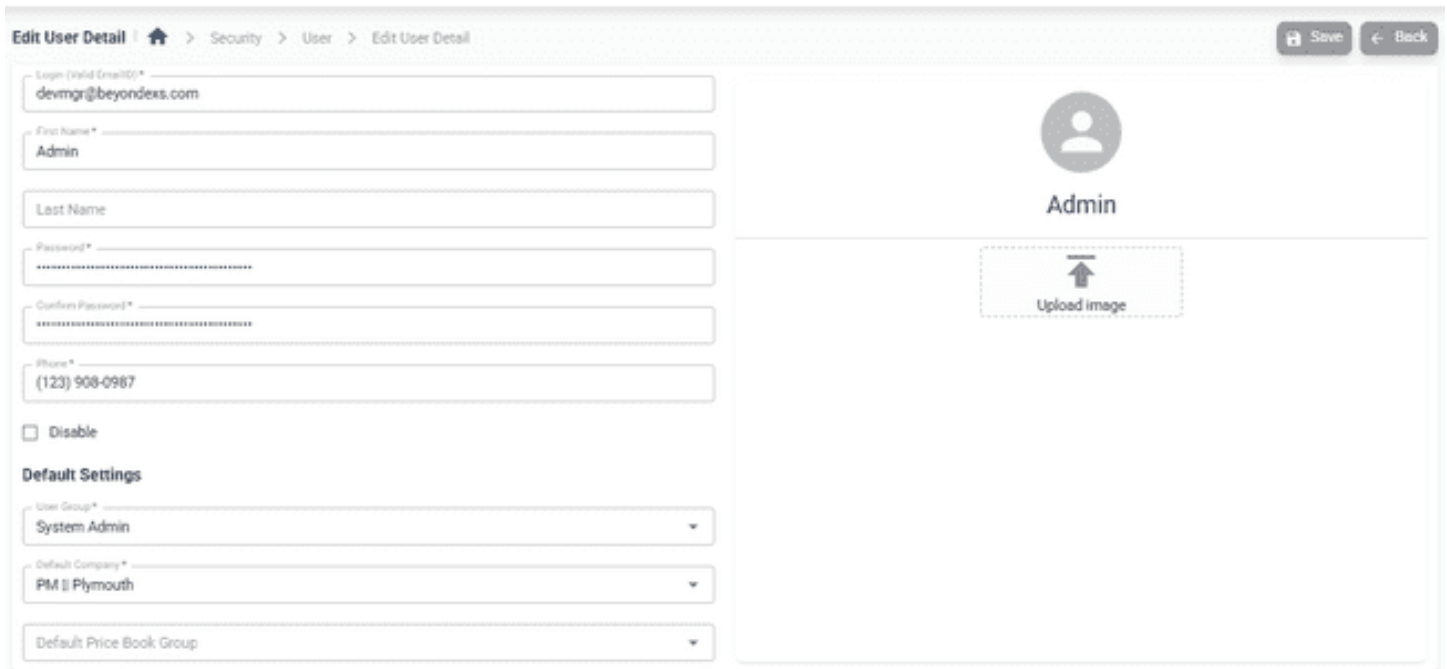
Security > User Group > Edit User Group Detail



To assign a menu to a user, click on the Security menu, then select 'User Group.' In the grid view, click on the 'Edit' icon. It will navigate to the 'Edit User Group Details' screen, where the user can grant access by clicking the checkboxes under 'Menu Access' as needed. Click the 'Save' button to save the data.

28.How to Assign Default Company,UserGroup,Price Book Group for a Customer?

Security > User>Edit User Detail



To assign a default company, user group, and price book group for a customer, clicks on the Security menu, then selects 'User List.' In the grid view list, click on the 'Edit' icon. It will navigate to the 'Edit User Details' screen, where the user can change the default settings and access as needed.