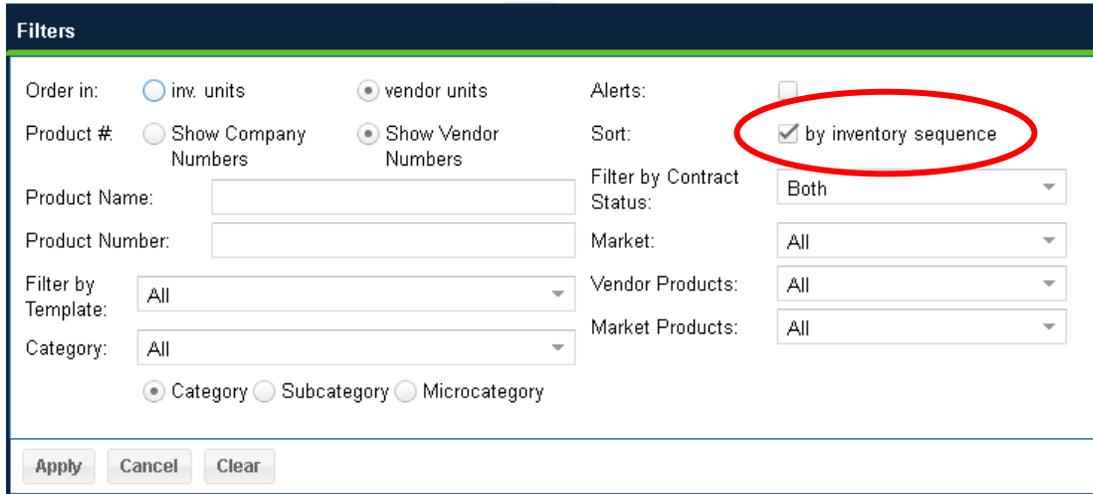


# SETTING UP AN ORDER GUIDE

If you want to set up a vendor order to match the sequence that would make it easiest to place the order, there are two ways to do this:

## Option 1: If you would like the order guide to be listed alphabetically

1. Click into a vendor order
2. Click on the **Filter Funnel**  and the following screen will appear



The screenshot shows a 'Filters' window with the following settings:

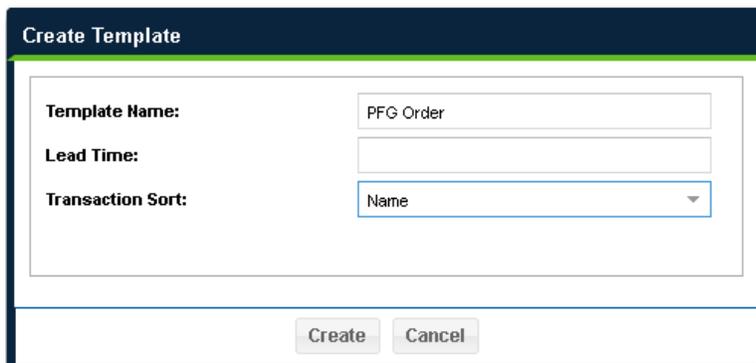
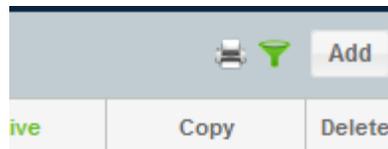
- Order in:  inv. units,  vendor units
- Product #:  Show Company Numbers,  Show Vendor Numbers
- Alerts:
- Sort:  by inventory sequence (circled in red)
- Filter by Contract Status: Both
- Market: All
- Vendor Products: All
- Market Products: All
- Filter by Template: All
- Category: All
- Category selection:  Category,  Subcategory,  Microcategory

Buttons at the bottom: Apply, Cancel, Clear

3. You will notice the default choice that is selected is **by inventory sequence**, meaning the sequence is exactly how you set up your shelf to sheet inventory.
4. If you uncheck this box, everything will appear alphabetical

## Options 2: This would be to create a template specific to your location.

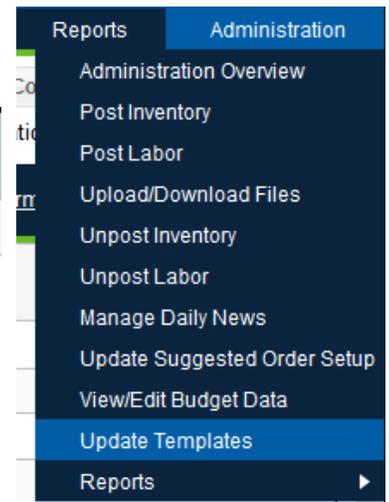
1. On the dashboard, hover over the **Administration** tab and click on **Update Templates**.
2. Click on **Add** at the top right of the screen.
3. This window will appear and you will enter a **Template Name**



The 'Create Template' dialog box contains the following fields:

- Template Name: PFG Order
- Lead Time: (empty)
- Transaction Sort: Name

Buttons at the bottom: Create, Cancel



4. You do not need to enter anything in the **Lead Time** field
5. Use the dropdown to choose the **Transaction Sort** as to how you would Netchef to sort the items: Name, Number or Sequence
6. Click **Create**
7. Once you are in the template you will be able to add items in which ever order you would like and click **Save**

8. The next time you place a vendor order, uncheck the **by inventory sequence** and use the dropdown next to **Filter by Template** to choose the template that you have created.

**Filters**

Order in:  inv. units  vendor units Alerts:

Product #:  Show Company Numbers  Show Vendor Numbers Sort:  by inventory sequence

Product Name:  Filter by Contract Status:

Product Number:  Market:

Filter by Template:  Vendor Products:

Category:  Market Products:

Category  Subcategory  Microcategory