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What is Preferred Online

Preferred Online is a web-enabled query tool for clients of Preferred Freezer Services. With Preferred Online, you can look up the status of an order or receipt, the order or receipt details, original signed bill of lading and tallies, inventory balances, inventory transactions, e-mail inventory, lot histories, item information and invoice information.

Preferred Online's drill down capability allows you to drill down multiple levels to find greater and greater detail about a receipt, order, lot, item or invoice. For example, you can search for a receipt and view summary information about the receipt. If you click on the receipt number, you drill down to the receipt details screen. If you click on the shipper code, you drill down a further level to find general information about the shipper.

Book-Marking Pages

Because of security concerns, Preferred Online does not support bookmarks. If you book-mark a page in Preferred online, you cannot return to the page without signing on again.

Automatic Expiry of a Session

If there is no activity in Preferred Online for 15 minutes, your session will automatically expire. When you click on any button in an expired session, you will have to login before you can continue.



Preferred Freezer Services has taken great measures in providing you with the most secure connection possible while using Preferred Online. Our web server uses SSL data encryption so that your data is safe.

System Requirements

Verify that your computer meets these requirements

1. *Computer with Pentium class processor or greater*
2. *One of the following Operating Systems (Windows 95, 98, 98 Second Edition, Windows ME, Windows NT 4.0 (Service Pack 3 or higher) Windows 2000, Windows XP*
3. *10MB hard disk space*
4. *RAM*
 - *16 MB for Windows 95/98*
 - *32 MB for Windows NT and Windows ME*
 - *64 MB for Windows 2000 and Windows XP*
5. *Internet Connection*
6. *Adobe Acrobat Reader5.0 or greater*
7. *Compatible browsers (IE 5.0-6.0).*



Changing Your Password

** we suggest you change your password once you receive your account codes and at least twice a year there after.*

Select the Administration Tab

The screenshot shows the Preferred Online interface. At the top, it says 'Environment: WL121 DataBase' and 'User: ABC Customer'. Below this is a navigation bar with 'File' and 'Help' links. The main menu includes 'Administration', 'Order Search', 'Receipt Search', 'Inventory Search', 'Item Search', and 'Invoice Search'. The 'Administration' tab is selected. Below the menu is a 'Select Option' section with a 'GENERAL' header. It displays 'Account: ABC Customer' and two buttons: 'Edit Your Settings' and 'Show Configuration'. A red arrow points to the 'Edit Your Settings' button.

Click on Edit Your Settings Button

The screenshot shows the 'Edit Your Settings' form in the Preferred Online interface. The form has a 'GENERAL' header. It contains the following fields: 'Current Password' (text box), 'New Password' (password box with asterisks), 'Confirm' (password box with asterisks), 'User Name' (text box with 'ABC Customer' entered), 'E-Mail Address' (text box), 'Rows Per Page' (dropdown menu with '50' selected and 'default: 50' text), and 'Session Monitoring Screen Refresh Rate (in seconds)' (dropdown menu with '60' selected and 'default: 50' text). At the bottom of the form are two buttons: 'Save' and 'Return to Select Option'.

Enter in your current password and then your new password, repeat your new password in the confirm field. Also enter in your contact e-mail address if blank.

* If you forget or have misplaced your password please call Technical Support and they will assist you, 973-820-4049



How to Logon to Preferred Online

1. Establish your internet connection
2. Open your browser and enter the Preferred Freezer Service.
website: www.preferredfreezer.com



3. Click on **PREFERRED ONLINE** icon on the intro page
4. Enter the Use Code and Password assigned to you by Preferred Freezer Services then press the login button.
5. Environment stays at the Default
6. If Preferred's site is unable to load please contact Technical Support 973-820-4049
7. Repeat Steps 4-5.

Welcome to Preferred Online. Please Login

User Code	<input type="text"/>
Password	<input type="password"/>
Environment	<input type="text" value="WL121 DataBase"/>
<input type="button" value="Login"/>	

**PREFERRED
ONLINE**

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Login Screen



How to Logoff of Preferred Online

Logoff – This will not disconnect you from Preferred Online. It will logoff the account you are using and prompt you to enter in another usercode and password.

Exit – This option disconnects you from the system completely. If you use this option you will have to log back on through Preferred's website www.preferredfreezer.com

◀ [Back](#) | [Forward](#) ▶ | [Logoff](#) | [Exit](#)



Entering Search Criteria

You can enter no criteria, a single search value or multiple values. For example, if you are performing an inventory search and leave all the fields blank, Preferred Online will retrieve all your inventory in every warehouse (company code), (*remember this will make your search larger and may take longer to be retrieved). If you specify a company code the system will only retrieve the inventory belonging to you in that warehouse. You can further refine your search by specifying both a company and a lot number; this search will retrieve only that specific lot number in that warehouse.

Examples of an Inventory Search

If you enter no criteria...	Preferred Online will retrieve all the inventory in all warehouses
If you specify a company code.W1..W2..etc	Preferred Online will retrieve only the inventory in the warehouse that you specify
If you specify a lot code	Preferred Online will retrieve that lot number only.

NOTE: The search fields in Preferred Online are all case-sensitive. Must use CAPS when called for.

You cannot view more than 100,000 records in any one query in Preferred Online. If your query results in more than 100,000 records from the database, you will have to narrow your query to restrict the number of records.

Result Pages

If the number of records exceeds 50, Preferred Online will divide up the results into pages (for example, Result Pages: 1 2 3). If the page number is underlined, you can click on it to display that page. If the page number is NOT underlined, it is the currently displayed page.

Wild Cards

The wild card character (%) allows you to perform searches without entering the full code for an item, shipper, carrier, customer code or

any search value. For example, if you enter A% as your item code, Preferred Online will retrieve all items with an item code starting with the letter A such as AAA, ABC, ABCSUP, A123, etc. You use the wild card character in two situations: you wish to search for multiple items or any search value in a single query or you forget the complete code for an item or any other search value. Wild cards can be placed:

- before a character string (for example, %WILDCARD)
- after a character string (for example, WILDCARD%)
- before and after a character string (for example, %WILDCARD%)

For example, an item code of %APPLE% would retrieve all item codes such as 1APPLE01, 1APPLE02, 2APPLE01 and 2APPLE02.

Company Codes

W1	Fayette St., Perth Amboy, NJ	A2	Wilmington, CA
W2	South Florida	A3	Raynham, MA
W3	FFD, Elm St., Perth Amboy, NJ	A4	Chicago, IL
W4	Miami, FL	A5	Medley, FL
W5	MCST Edison, NJ	A6	Newark, NJ
W6	Los Angeles, CA	A7	Boston Harbor, Everett, MA
W7	Vernon, CA	A8	Westfield, MA
W8	Jersey City, NJ	A9	Long Beach Freeway, LA, CA
W9	Ultrafreeze, Vernon, CA	B1	Philadelphia, PA
A1	Boston, MA		

***** Note: The Drop Down box in the Company field will only display the facilities selected when first enrolled to Preferred Online.
To view additional warehouses please contact Technical Support
973-820-4049***



Looking Up Orders

The order search shows the order details and the image link to the original signed bill of lading.

The screenshot shows a web application interface for searching orders. At the top, there are navigation tabs: Administration, Order Search (selected), Receipt Search, Inventory Search, Item Search, and Invoice Search. Below the tabs is the title "Order Search Criteria" and a note: "You may search from any or all of the following fields:". The form is divided into three sections: GENERAL, ITEM-UP, and DATE-UP. The GENERAL section contains fields for Order Number, Company (a dropdown menu with "T1 Training Company - Preferred" selected), Consignee (a dropdown menu with "M1 MCFT Preferred Transportation" selected), Carton, Work Item, Order From, and PO Number. The ITEM-UP section contains fields for Customer Order Number and Customer Name. The DATE-UP section contains a Date Type dropdown (with "No Date" selected), a Date Range - From: field, a To: field, and a Quick Selection dropdown. The dropdown menus for Company and Consignee are open, showing a list of options including "M1 MCFT Preferred Transportation", "W1 Preferred Freezer Services Inc", "W2 Preferred South Florida", "W3 Preferred FFD", "W4 Preferred Freezers, Miami Inc", "W5 MCFT Preferred Services", "W6 Preferred Freezers of LA", "W7 Preferred Freezers of Verman", "W8 Preferred of Jersey City", and "W9 Preferred Freezer-ULTRA FREEZE".

Order Search screen

Search Criteria

General Block

Order Number – This number is found on Preferred Freezer Services bill of lading in the top right hand corner. You must drop the prefix number. This will vary between the different warehouses, for example 5000123 bill of lading number would be entered as 000123.

Company Code – Chose the Preferred Warehouse that you would like to search. You can either search all the warehouses by selecting ALL or a specific warehouse by highlighting the company code.

Consignee – The Consignee is the customer who purchased your product. You can enter in our consignee code in the first field, or use the wildcard search in the second field. See Wildcard search on page 7.

Carrier – The Carrier is the company used to ship the product. You can enter in our carrier code in the first field, or use the wildcard search in the second field. See Wildcard search on page 7.

Work Flow – The Work Flow search allows you to select just the Deleted orders, Confirmed orders, or Opened orders. If you do not select a check box the system will retrieve all types orders.

(*Tip: To find all open orders (orders that have not been shipped), click in the Opened Order checkbox and then click the search button. This will retrieve all your open orders in every warehouse.)

Order From – The Order From option allows you to search for orders that have been entered by your company using Preferred Online, *e-Vista Orders*, or by the orders preferred has entered, *WarehouseLogic Orders*. If you do not select either option, the system will default to All Orders. ****Entering orders via Preferred Online is currently not available****

PO Number - You can enter your PO number here. This search field will not work if your company does not use PO numbers or our customer service employees have not been instructed to.

Customer Block

Customer Order Number – You can enter your customer order number here. This search field will not work if your company does not use customer order numbers or our customer service employees have not been instructed to. (*Remember Preferred Freezer Services order number is found under the header, General/Order Number)

Customer Code – This field allows customers that are affiliated with other companies the option to look up an individual company. Leaving the field blank will retrieve all companies. If you are not affiliated with any other companies this field will remain as a default to your customer code only.

(*Tip: look-up all the companies first to identify the individual codes Preferred assigns to them. If you enter in an incorrect code the query result will be blank. The system will not tell you that you have entered an incorrect code).

Date Range Block

(*Tip: Click in the Order Date circle. Be sure to select a time period to lookup, if not the system will query back 2 years from the present date.)

Date Range – Select a specific time period by using the drop down boxes.

Quick Selection – This field allows you to select predefined time periods, ie. last week, last month.








Order Search Procedure

- 1** Select Order Search.
- 2** Key in your search criteria. Make sure that you highlight then company code and click the circle in front of the date range option, if not the system will query back 2 years from the present date.
- 3** Click Search. Preferred Online will retrieve all orders that match the criteria that you specified. If there is more than one page of orders retrieved, you can click on the page number to access the desired page.
- 4** On the Order Search Results page, do one of the following:

If you wish to look up the order detail....	Click on the order number. Then proceed to the next step
If you wish to look up the consignee...	Click on the consignee code
If you wish to look up the carrier	Click on the carrier code.
If you wish to look up time stamping information	Click in the Work Flow column
If you wish to look up the Original Signed Bill of Lading	Click on the corresponding image paper link REQUIREMENTS TO VIEW IMAGE <i>*must be a confirmed order (work flow column)</i> <i>*must have Adobe Acrobat to view the image</i> <i>* IF NO Image is Available and both requirements are met, please call the corresponding customer service department of that particular Preferred Warehouse.</i>

Administration	Order Search	Receipt Search	Inventory Search	Item Search	Invoice Search
----------------	---------------------	----------------	------------------	-------------	----------------

Order Search Results							
16 Total Matches							
							New Search
							Result Pages: 1 of 1

ORDER	COMPANY	CUSTOMER	CONSIGNEE	CARRIER	WORK FLOW	CUSTOMER ORDER	PURCHASE ORDER	ORDER DATE	IMAGE
47	T1	ABCCUS	The customer	My Truck	Enter Order			08.07.2002	
48	T1	ABCCUS	A&PTEA	ACTI	Confirm Order	003902	10029	08.08.2002	
49	T1	ABCCUS	ALPSFD	MCST	Confirm Order	99309	1009	08.08.2002	
51	T1	ABCCUS	CAFEIN	AMEFIS	Enter Order	4509	20938	08.12.2002	
52	T1	ABCCUS	A&PTEA	UNASSIGNED	Enter Order	1245		08.12.2002	
53	T1	ABCCUS	A & P	ACTI	Confirm Order	19298673	98327654	08.16.2002	
54	T1	ABCCUS	A&PTEA	ACTI	Enter Order	93854		08.16.2002	
55	T1	ABCCUS	A&PTEA	APAI	Confirm Order	938754	843654	08.16.2002	
56	T1	ABCCUS	A&PTEA	BKLS	Enter Order	9327654	8386543	08.16.2002	
57	T1	ABCCUS	A&PTEA	APOI	Enter Order	893754	836	08.16.2002	
60	T1	ABCCUS	SUNNY RESTAURANT	HM	Enter Order	RELEASE 1234		08.23.2002	
64	T1	ABCCUS	A&FOQ	AIR	Enter Order	1254		09.03.2002	
67	T1	ABCCUS	WALSEA	UNASSIGNED	Enter Order	12314		09.24.2002	
71	T1	ABCCUS	ACMSMQ	ALPSFD	Confirm Order	932704	2390843284	10.06.2002	
72	T1	ABCCUS	582STE	ALT	Enter Order	2034234	324342	10.06.2002	
151	T1	ABCCUS	ACMSMQ	QWNT	Confirm Order	123456		04.21.2003	

Order Search Result Screen

5 On the Order Detail page, you will see the order header plus one detail line for each line on the order.

6 Do one of the following:

If you wish to find additional information	Click on the DETAILS or REMARKS Button
If you wish to view Inventory Details, such as lot description or lot history	Click on the Inventory Detail DETAILS button

File | Help

Back | Forward | Logout | Exit

Administration | **Order Search** | Receipt Search | Inventory Search | Item Search | Invoice Search

Order Details

HEADER INFORMATION									
HEADER									
Order Number:	49			Source Order Number:					
Company:	T1			Back Order Number:					
Customer:	ABCCUS ABC Custom Foods			Total Units:	10				
Status:	Confirm Order 08.08.2002 18:05:51			Gross Weight:	98.5				
Consignee:	ALPSFD ALPHA SEAFOOD			Net Weight:	98.5				
Carrier:	MCST MCST			Ship Weight:	99				
Customer Order Number:	99309			Ship Unit:	10				
Priority:	5			Weight Measure:	LBS				
P.O Number:	1009			Remarks:	REMARKS				
Load Number:				Carrier Details:					
To Ship Date:	08.09.2002			Quick Response:					
To Arrive Date:	08.09.2002			Pallet Details:	DETAILS				
Order Date:	08.08.2002			EDI:					
Shipped Date:	08.08.2002			Image:					

DETAILS										
ITEM CODE	INVENTORY DETAIL	CUSTOMER CODE	LOT CODE	HOLD CODE	ORDER QTY	SHIP QTY	GROSS WGT	NET WGT	WM	REMARKS
MEAT	DETAILS	ABCCUS	12345		2CS	2CS	18.5	18.5	LBS	
LOBSTER	DETAILS	ABCCUS	23501		2CS	2CS	80	80	LBS	

Order Details Screen



Looking Up Receipts

The receipt search shows receipt detail information and the image link for your original tallies and all backup paperwork.

Receipt Search screen

Search Criteria

General Block

Receipt Number – This number is found on Preferred Freezer Services warehouse receipts, the number is located on the upper right hand corner. The prefix number to a warehouse receipt will always be 1. You must drop the 1 when using the receipt number search. For example 1-123456 should be entered as 123456.

(*Tip: To search receipts it is best to use only the company code and date range parameters.)

Company Code – Chose the Preferred Warehouse that you would like to search. You can either search all the warehouses by selecting ALL or a specific warehouse by highlighting the company code.

Consignee – The Consignee is the customer who purchased your product. You can enter in our consignee code in the first field, or use the wildcard search in the second field. See Wildcard search on page 7.

Carrier – The Carrier is the company used to ship the product. You can enter in our carrier code in the first field, or use the wildcard search in the second field. See Wildcard search on page 7.

Work Flow – The Work Flow search allows you to select just the Deleted orders, Confirmed orders, or Opened orders. If you do not select a check box the system will retrieve all types orders.

Receipt From

The Receipt From option allows you to search for receipts that have been entered by your company using Preferred Online, *e-Vista Receipts*, or by the receipts preferred has entered, *WarehouseLogic Receipts*. If you do not select either option, the system will default to All Receipts. ***Entering receipts via Preferred Online is currently not available***

Pro Bill Number - You can enter a specific container number here.

Customer Block

Customer Receipt Number – You can enter your customer receipt number here. This number can be found on the first page of your original tally. It is located on the upper right hand corner. It is the 5-digit number underneath the barcode.

Customer Code – This field allows customers that are affiliated with other companies the option to look up an individual company. Leaving the field blank will retrieve all companies. If you are not affiliated with any other companies this field will remain as a default to your customer code only.

(*Tip: look-up all the companies first to identify the individual codes Preferred assigns to them. If you enter in an incorrect code the query result will be blank. The system will not tell you that you have entered an incorrect code).

Date Range Block

(*Tip: Click in the Order Date circle. Be sure to select a time period to lookup, if not the system will query back 2 years from the present date.)

Date Range – Select a specific time period by using the drop down boxes.

Quick Selection – This fields allows you to select predefined time periods, ie. last week, last month.

Receipt Search Procedure

- 1 Select Receipt Search.
- 2 Key in your search criteria. Make sure that you press the SHIFT key when entering upper-case codes.
- 3 Click Search. Preferred Online will retrieve all receipts that match the criteria that you specified. If there is more than one page of receipts retrieved, you can click on the page number to access the desired page.
- 4 On the Receipt Search Results page, do one of the following:

If you wish to look up the receipt detail	Click on the receipt number. Then proceed to the next step
If you wish to look up the shipper	Click on the shipper code
If you wish to look up the carrier	Click on the carrier code
If you wish to look up time stamping information	Click in the Work Flow column
If you wish to view/ print the original tally	Click on the corresponding image paper link REQUIREMENTS TO VIEW IMAGE <i>*must be a confirmed order (work flow column)</i> <i>*must have Adobe Acrobat to view the image</i> <i>* IF NO Image is Available and both requirements are met, please call the corresponding customer service department of that particular Preferred Warehouse.</i>

Administration
Order Search
Receipt Search
Inventory Search
Item Search
Invoice Search

Receipt Details

HEADER INFORMATION			
HEADER			
Receipt Number:	64	Source Receipt Number:	
Company Code:	T1	O/S Receipt Ref:	
Customer Code:	ABCCUS ABC Custom Foods	Total Units:	665
Status:	Confirm Receipt 08.07.2002 12:54:25	Gross Weight:	7016.25
Shipper:	<u>/ The Company</u>	Net Weight:	7016.25
Carrier:	<u>/ The Truck</u>	Receipt Reference Number:	123456
Priority:	5	Unit of Measure:	LBS
Receipt Date:	08.07.2002 12:46:00	Remarks:	
Received Date:	08.01.2002	Carrier Details:	
Invoice Date:	08.01.2002	Pallet Details:	
EDI:		Image:	

DETAILS								
ITEM CODE	INVENTORY DETAIL	LOT CODE	EXPECT QTY	RECEIVE QTY	GROSS WGT	NET WGT	UOM	REMARKS
CHICKEN	DETAILS	01234	100CS	100CS	3000	3000	LBS	
MEAT	DETAILS	12345	45CS	45CS	416.25	416.25	LBS	
SHRIMP	DETAILS	23456	80CS	80CS	1600	1600	LBS	
LOBSTER	DETAILS	34567	50CS	50CS	2000	2000	LBS	

Receipt Search Results Screen

5 On the Receipt Detail page, you will see the receipt header plus one detail line for each line on the receipt.

6 Do one of the following:

If you wish to find additional information	Click on the DETAILS or REMARKS Button
If you wish to view Inventory Details, such as lot description or lot history	Click on the Inventory Detail DETAILS button
If you wish to view the Receipt Image	Click on the Image Icon *remember must have Adobe Acrobat Reader

Administration
Order Search
Receipt Search
Inventory Search
Item Search
Invoice Search

Receipt Search Results

[New Search](#)
11 Total Matches
Result Pages: 1 of 1

RECEIPT	COMPANY	CUSTOMER	SHIPPER	CARRIER	WORK FLOW	REFERENCE	PRO BILL NUMBER	RECEIPT DATE	IMAGE
64	T1	ABCCUS	The Company	The Truck	Confirm Receipt	123456		08.07.2002 12:46:00	
65	T1	ABCCUS	ABCSEA	ABS	Confirm Receipt	399-9	88499488	08.08.2002 17:01:00	
67	T1	ABCCUS	SAME	AIR	Enter Receipt	84654	93754	08.15.2002 17:31:00	
68	T1	ABCCUS	AGASUP	ACTI	Confirm Receipt	983654	983674543	08.16.2002 09:43:00	
71	T1	ABCCUS	ABCSEA	ACTI	Confirm Receipt	837543	9298543	08.16.2002 09:54:00	
72	T1	ABCCUS	SAME	ACTI	Enter Receipt	93754	8932986534	08.16.2002 10:00:00	
73	T1	ABCCUS	AGNSEA	AIR	Enter Receipt	9843654	838754	08.16.2002 10:01:00	
74	T1	ABCCUS	ABCSEA	AIR	Enter Receipt	9823756	93864	08.16.2002 10:03:00	
81	T1	ABCCUS	BRUIN MOBILE	MY TRUCK	Confirm Receipt	00027	PS123FGHX	08.22.2002 14:57:00	
82	T1	ABCCUS	WALIMP	14A	Deleted	000005		08.29.2002 11:50:00	
87	T1	ABCCUS	SAFHAR	3DE	Confirm Receipt	243908234	7904324	10.06.2002 14:48:00	

Receipt Details Screen



Looking Up Inventory

The inventory search shows the level 2, 3 and 4 values of an item (if applicable) as well as the on-hand and available quantities. If you perform an inventory detail search, Preferred Online will show the on-order, on receipt and in-transit quantities as well as the item's quantity breakdown. When you perform an inventory search, Preferred Online displays one line for each unique inventory entity. For example, if your item has a single inventory level, Preferred Online will display one line for each item. If your item has two inventory levels, item and lot, Preferred Online will display one line for each unique combination of item and lot. If your item has three inventory levels, item, lot and expiry date, Preferred Online will display one line for each unique combination of item, lot and expiry date.

Inventory Search Screen

EXAMPLE

Inventory levels = 2 (item, lot)

Suppose you have the following product in your warehouse:

<u>Item</u>	<u>Lot</u>
A1	101
A1	105
A1	110

In this example, you have one item with three lots in your warehouse. Preferred Online will show three lines on the Inventory Search Results page: A1(101), A1 (105) and A1 (110).

Search Criteria

Company Code – Chose the Preferred Warehouse that you would like to search. You can either search all the warehouses by selecting ALL or a specific warehouse by highlighting the company code.

Item Code – Enter in a specific item code or use the wild card to search with. If your company has not instructed Preferred to use your item codes this search will not work.

Customer Code – This field allows customers that are affiliated with other companies the option to look up an individual company. Leaving the field blank will retrieve all companies. If you are not affiliated with any other companies this field will remain as a default to your customer code only.

Level 2: This is the field the lot number is entered (include both numeric and character).

Level 3: This is the field the expiry date, production date or julienne date is entered (include both numeric and character).

Level 4: This is the field the specialize field. (This field will be used only if Preferred and the customer have created a specialized field).

Suppress 0 Quantity – This option allows you to view your inventory without any zeroed out lots, ie. empty lots. Click in the check box to use this option.

Summarize to: This option is defaulted to level 4: so it will retrieve a complete inventory.

Inventory Search Procedure

1 Select Inventory Search.

2 Key in your search criteria. Make sure that you press the SHIFT key when entering upper-case codes.

3 Click Search. Preferred Online will retrieve all items that match the criteria that you specified. If there is more than one page of items retrieved, you can click on the page number to access the desired page.

(*Tip: Entering no criteria in the inventory will bring up all your inventory for every warehouse)

Administration

Order Search

Receipt Search

Inventory Search

Item Search

Invoice Search

Inventory Search Results

17 Total Matches

New Search

Result Pages: 1 of 1

Item	DESCRIPTION / INVENTORY INFO	COMPANY	CUSTOMER	LOT CODE	QUANTITY ON HAND	QUANTITY AVAILABLE	RECEIVED	EXPIRY
CHICKEN	Chicken	T1	ABCCUS	01234 Whole Chicken Avg Wt 30	87CS	30CS	08.01.2002	
CHICKEN	Chicken	T1	ABCCUS	1005 1	3CS	3CS	08.16.2002	
CHICKEN	Chicken	T1	ABCCUS	1007 1	0	0	01.01.1970	
CHICKEN	Chicken	T1	ABCCUS	1010 1	0	0	01.01.1970	
CHICKEN	Chicken	T1	ABCCUS	1011 1	0	0	01.01.1970	
CHICKEN	Chicken	T1	ABCCUS	123123 Craig	50CS	50CS	10.06.2002	
CHICKEN	Chicken	T1	ABCCUS	23499 Whole Chicken	10CS	7CS	08.08.2002	
CHICKEN	Chicken	T1	ABCCUS	54156 WHOLE BLK CHICKEN TYSON RED & WT AVG 35	49CS	39CS	08.22.2002	
LOBSTER	Lobster	T1	ABCCUS	23501 Lobster Legs	2CS	2CS	08.08.2002	
LOBSTER	Lobster	T1	ABCCUS	31221 2/3 IQF RED LOBSTER YUMMY 40 LB	70CS	20CS	08.22.2002	
LOBSTER	Lobster	T1	ABCCUS	34567 7/8 Red Lobsters Yummy Brand 4/10	46CS	44CS	08.01.2002	
LOBSTER	Lobster	T1	ABCCUS	952 1	5CS	5CS	08.16.2002	
MEAT	Meat	T1	ABCCUS	1008 1	0	0	01.01.1970	
MEAT	Meat	T1	ABCCUS	12345 5/6 Flank Steaks Avg Wt 11oz	39CS	22CS	08.01.2002	
MEAT	Meat	T1	ABCCUS	23503 Imported Steaks - Argentina	42CS	42CS	08.08.2002	
MEAT	Meat	T1	ABCCUS	31142 5/6 FLANK STEAKS AVG 7LB	30CS	30CS	08.22.2002	
SHRIMP	SHRIMP	T1	ABCCUS	23456 16/20 IQF Shrimp My Brand 4/5	80CS	80CS	08.01.2002	

Inventory Search Result Screen

4 On the Inventory Search Results page, do one of the following for the entity that you wish to look up:

If you wish to look up static information about the item on the detail line ...	Click on the item code under the Item code column
If you wish to look up the inventory description, on order, on-receipt and intransit quantities as well as the quantity breakdown of the item on the detail line ...	Click in the Description/Inventory Info column (lot histories)

Administration

Order Search

Receipt Search

Inventory Search

Item Search

Invoice Search

Inventory Detail

INVENTORY HISTORY (BASIC)

INVENTORY HISTORY (ASIC)

WAREHOUSE INFO

INVENTORY INFORMATION	
STANDARD	
Company Code:	T1
Item Code / Description:	CHICKEN Chicken
Customer Code:	ABCCUS
Lot Code / Description:	01234 Whole Chicken Avg Wt 30
Received Date:	08.01.2002
QUANTITY DETAILS	
On Hand:	87CS
Available:	30CS
On Order:	57CS
On Receipt:	0
On Non-Shippable Hold:	0
In Transit:	0
Quantity Breakdown:	CS

Inventory Detail Screen

To Print an Inventory Report

- Go to upper left hand corner to File-> select Print.
- Note if there is more than one page of results you have to print each one

To E-Mail your Inventory in Excel Spreadsheet or HTML format

The screenshot shows a web-based email configuration window titled "e-Vista E-mail (Inventory Detail Result)". It includes fields for "Address:", "To:", "CC:", "BCC:", and "Subject:". Each of the "To:", "CC:", and "BCC:" fields has a dropdown menu currently showing "--- Message Recipients ---" and a "Delete" link below it. To the right of these fields, there are radio buttons for "Format:" (with "CSV" selected and "HTML" unselected) and "Range:" (with "All" selected, "Current Page (1)" unselected, and "From 1 To 1" unselected). At the bottom of the window are three buttons: "Close", "Send", and "Clear".

- 1 Go to upper left hand corner to File-> select E-mail
- 2 Enter in the e-mail address in the Address: field
- 3 Click the "To:", this will enter the above e-mail address into the field.
- 4 Repeat Steps 1-2 for CC: or BCC
- 5 Chose a Format: CSV- Excel Spreadsheet, HTML – the same image from Preferred Online
- 6 Enter a Range
- 7 Click Send
- 8 Wait a few moments. A message box will appear to confirm the e-mail has been sent. If you "X" out or close the email box, you may terminate the job.



Looking Up Inventory History

The Inventory History page shows all inventory transactions for a particular entity from when it was first entered into the system until the present. For each inventory transaction, Preferred Online shows the following:

- the transaction date and time
- the transaction type
- the document number
- the number of units and weight
- the hold code (if applicable)
- the carrier (for order and receipt transactions only)
- the shipper, consignee or reason code
- reference line 1 and 2 (if applicable)

The following table shows the various transaction types in Preferred's Warehouse-Logic:

Transaction Type Description

Shipped Order	The inventory was shipped on a confirmed order.
Received	The inventory was received on a confirmed receipt.
Open Order	The inventory is on an open order
Open Receipt	The inventory is on an open receipt.
Hold Adjustment	The inventory was placed on hold or a hold was removed from the inventory.
Order Move	The inventory was part of a directed move. A directed moved is any movement of product other than a pick, put away, replenishment or relocation. Directed moves are used to track the cartonization or palletization of product
Relocation	The inventory was relocated in RELO

- 1** Select Inventory Search.
- 2** Key in your search criteria. Make sure that you press the SHIFT key when entering upper-case codes.
- 3** Click Search. Preferred Online will retrieve all items that match the criteria that you specified. If there is more than one page of items retrieved, you can click on the page number to access the desired page.
- 4** On the Inventory Search Results page, click in the Description/ Inventory column

Administration	Order Search	Receipt Search	Inventory Search	Item Search	Invoice Search
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Inventory Search Results								New Search
17 Total Matches								Result Pages: 1 of 1
Item	DESCRIPTION / INVENTORY INFO	COMPANY	CUSTOMER	LOT CODE	QUANTITY ON HAND	QUANTITY AVAILABLE	RECEIVED	EXPIRY
CHICKEN	Chicken	T1	ABCCUS	01234 Whole Chicken Avg Wt 30	87CS	30CS	08.01.2002	
CHICKEN	Chicken	T1	ABCCUS	1005 1	3CS	3CS	08.16.2002	
CHICKEN	Chicken	T1	ABCCUS	1007 1	0	0	01.01.1970	
CHICKEN	Chicken	T1	ABCCUS	1010 1	0	0	01.01.1970	
CHICKEN	Chicken	T1	ABCCUS	1011 1	0	0	01.01.1970	
CHICKEN	Chicken	T1	ABCCUS	123123 Craig	50CS	50CS	10.06.2002	
CHICKEN	Chicken	T1	ABCCUS	23499 Whole Chicken	10CS	7CS	08.08.2002	
CHICKEN	Chicken	T1	ABCCUS	54156 WHOLE BLK CHICKEN TYSON RED & WT AVG 35	49CS	39CS	08.22.2002	
LOBSTER	Lobster	T1	ABCCUS	23501 Lobster Legs	2CS	2CS	08.08.2002	
LOBSTER	Lobster	T1	ABCCUS	31221 2/3 IQF RED LOBSTER YUMMY 40 LB	70CS	20CS	08.22.2002	
LOBSTER	Lobster	T1	ABCCUS	34567 7/8 Rad Lobsters Yummy Brand 4/10	46CS	44CS	08.01.2002	
LOBSTER	Lobster	T1	ABCCUS	952 1	5CS	5CS	08.16.2002	
MEAT	Meat	T1	ABCCUS	1008 1	0	0	01.01.1970	
MEAT	Meat	T1	ABCCUS	12345 5/6 Flank Steaks Avg Wt 11oz	39CS	22CS	08.01.2002	
MEAT	Meat	T1	ABCCUS	23503 Imported Steaks - Argentina	42CS	42CS	08.08.2002	
MEAT	Meat	T1	ABCCUS	31142 5/6 FLANK STEAKS AVG 7LB	30CS	30CS	08.22.2002	
SHRIMP	SHRIMP	T1	ABCCUS	23456 16/20 IQF Shrimp My Brand 4/5	80CS	80CS	08.01.2002	

Inventory Search Results Screen

- On the Inventory Detail page, click on Inventory History. Preferred Online will show one line of transaction information for each transaction involving the inventory entity that you looked up.

Administration

Order Search

Receipt Search

Inventory Search

Item Search

Invoice Search

Inventory Detail

INVENTORY HISTORY (DECS)

INVENTORY HISTORY (ASCI)

WAREHOUSE INFO

INVENTORY INFORMATION	
STANDARD	
Company Code:	T1
Item Code / Description:	CHICKEN Chicken
Customer Code:	ABCCUS
Lot Code / Description	01234 Whole Chicken Avg Wt 30
Received Date:	08.01.2002
QUANTITY DETAILS	
On Hand:	87CS
Available:	30CS
On Order:	57CS
On Receipt:	0
On Non-Shippable Hold:	0
In Transit:	0
Quantity Breakdown:	CS

Inventory Detail Screen

- 6 If the transaction involves an order or receipt, you can click on the Order/Receipt Details button to view the order or receipt details corresponding to that lot number and also obtain the image on the detail screen. (see below)

Administration

Order Search

Receipt Search

Inventory Search

Item Search

Invoice Search

Inventory History

HISTORY INFORMATION										
HEADER										
Company Code: T1										
Customer Code: ABCCUS										
Item Code: CHICKEN						Item Description: Chicken				
Lot Code: 01234						Lot Code Description: Whole Chicken Avg Wt 30				
QUANTITY DETAILS										
On Hand: 87CS						Available: 30CS				
On Order: 57CS						On Receipt: 0				
On Non-Shippable Hold: 0						In Transit: 0				

DETAIL HISTORY (Descending Sequence)										
ORDER/RECEIPT DETAILS	TRANSACTION DATE	TRANSACTION TYPE	DOCUMENT	UNITS	WEIGHT	HOLD	CARRIER	CONSIGNEE/SHIPPER/OTHER	REFERENCE 1	REFERENCE 2
DETAILS	04.25.2003	Shipped Order-R	151	-5CS	-150	*	QWNT	ACMSMO	123456	
DETAILS	10.06.2002	Open Order-R	72	-5CS	-150	*	ALT	582STE	2034234	324342
DETAILS	10.06.2002	Shipped Order-R	71	-6CS	-180	*	ALPSFO	ACMSMO	932704	2390843284
DETAILS	09.24.2002	Open Order-P	67	-40CS	-1200	*	UNASSIGNED	WALSEA	12314	
DETAILS	08.16.2002	Open Order-R	57	-5CS	-150	*	APOL	ASPTA	893754	836
DETAILS	08.16.2002	Shipped Order-R	55	-2CS	-60	*	APAT	ASPTA	938754	843654
DETAILS	08.16.2002	Open Order-R	56	-2CS	-60	*	BKLS	ASPTA	9327654	8386543
DETAILS	08.07.2002	Open Order-R	47	-5CS	-150	*	L	The customer		
DETAILS	08.01.2002	Received-P	64	100CS	3000	*	L	The Company	123456	

9 Total Matches

Inventory History Screen



Looking Up Items

The item search shows static information about an item such as the item code, item description, alternate description and UPC code (if any), the height, width and length, the gross and net weight, the quantity breakdown and other setup information about the item.

Note: The item search does not show inventory balances or transaction information; if you want to look up this information, you must perform an inventory search.

Administration Order Search Receipt Search Inventory Search **Item Search** Invoice Search

Item Search Criteria
You may search from any or all of the following fields:

GENERAL

Company: ALL
Item:
Customer:
Item Description:
Alternate Description:
UPC:

Search

Item Search Screen

Search Criteria

Company Code – Chose the Preferred Warehouse that you would like to search. You can either search all the warehouses by selecting ALL or a specific warehouse by highlighting the company code.

Item Code – Enter in a specific item code or use the wild card to search with. If your company has not instructed Preferred to use your item codes this search will not work.

Customer Code – This field allows customers that are affiliated with other companies the option to look up an individual company. Leaving the field blank will retrieve all companies. If you are not affiliated with any other companies this field will remain as a default to your customer code only.

Item Description – Enter in the item description here, if you do not know the exact description you can use the wildcard to search, see page 7.

Alternate Description – Enter in the Alternate Description here, if you do not know the exact description you can use the wildcard to search, see page 7.

UPC – Enter in the UPC Code here if applicable

(*Tip: If you do a blank search, Preferred Online will retrieve all of your existing item codes)

Item Search Procedure

- 1 Select Item Search.
- 2 Key in your search criteria. Make sure that you press the SHIFT key when entering upper-case codes.
- 3 Click on Search. Preferred Online will retrieve all items that match the criteria that you specified.

Administration	Order Search	Receipt Search	Inventory Search	Item Search	Invoice Search
----------------	--------------	----------------	------------------	-------------	----------------

Item Search Results					
4 Total Matches					
					New Search
					Result Pages: 1 of 1
ITEM CODE	COMPANY CODE	CUSTOMER CODE	DESCRIPTION	ALT DESCRIPTION	UPC
CHICKEN	T1	ABCCUS	Chicken		
LOBSTER	T1	ABCCUS	Lobster		
MEAT	T1	ABCCUS	Meat		
SHRIMP	T1	ABCCUS	SHRIMP		

Item Search Results Screen

- 4 Click on the item that you wish to look up. Preferred Online will display the Item Detail page showing complete information for the item.

Administration	Order Search	Receipt Search	Inventory Search	Item Search	Invoice Search
----------------	--------------	----------------	------------------	-------------	----------------

Item Detail					
ITEM INFORMATION					
STANDARD					
Company Code:	T1	UPC:			
Item Code:	LOBSTER	Country Code:			
Customer Code:	ABCCUS				
Description:	Lobster				
Alt Description:					
PHYSICAL					
Height:		Unit of Measure Height:	IN		
Width:		Unit of Measure Width:	IN		
Length:		Unit of Measure Length:	IN		
Gross Weight:	40	Unit of Measure Weight:	LBS		
Net Weight:	40				
Tare Weight:					
COMMODITY					
Commodity Code:	100000				
Commodity Sub-code:	00				
SPECIFICS					
Quantity Breakdown:	EA, CS = 4 EA				
Hazardous Code:					
Hazardous Description:					
Kit y/n:	N				
Status:	A				

Item Detail Screen



Looking Up Invoices

The invoice search allows you to view the invoice type, invoice amount, invoice status and the invoice date.

Administration | **Order Search** | **Receipt Search** | **Inventory Search** | **Item Search** | **Invoice Search**

Invoice Search Criteria
You may search from any or all of the following fields:

GENERAL

Company: ALL
Invoice Number:
Invoice Prefix:
Invoice Type:
Customer:
Invoice Amount:

DATE RANGE

Date Type: ☒ No Date ☐ Invoice Date
Date Range - From:
To:
Quick Selection:

Search

Invoice Search Screen

Search Criteria

General Block

Company Code – Chose the Preferred Warehouse that you would like to search. You can either search all the warehouses by selecting ALL or a specific warehouse by highlighting the company code.

Invoice Number – The invoice number is found on Preferred's Warehouse Receipts and Invoices in the upper right hand corner. You must drop the invoice prefix before entering the number.

Invoice Prefix – The invoice prefix are:

- 1- Warehouse Receipt- daily transfers and inbound
- 2- Renewal – storage payments
- 3- Accessorial – orders, transfers and miscellaneous charges

Invoice Type – Same as above but entered with the character codes rather than a numeric code.

Customer Code – This field allows customers that are affiliated with other companies the option to look up an individual company. Leaving the field blank will retrieve all companies. If you are not affiliated with any other companies this field will remain as a default to your customer code only.

Invoice Amount –You can enter the invoice amount here or use <,> or = as to search for the invoice amount.
For example: if you enter <100, the system will retrieve every entry less than 100.

Date Range Block

(*Tip: Click in the Order Date circle. Be sure to select a time period to lookup, if not the system will query back 2 years from the present date.)

Date Range – Select a specific time period by using the drop down boxes.

Quick Selection – This fields allows you to select predefined time periods, ie. last week, last month.

Invoice Search Procedure

- 1 Select Invoice Search.
- 2 Key in your search criteria. Make sure that you press the SHIFT key when entering upper-case codes.
- 3 Click on Search. Preferred Online will retrieve all invoices that match the criteria that you specified.

Administration	Order Search	Receipt Search	Inventory Search	Item Search	Invoice Search
----------------	--------------	----------------	------------------	-------------	----------------

Invoice Search Results								New Search
5 Total Matches								Result Pages: 1 of 1
INVOICE NUMBER	COMPANY CODE	CUSTOMER CODE	PREFIX	TYPE	STAT	DATE	AMOUNT	IMAGE
89	T1	ABCCUS	1	RCPT	A	2002-08-16	8.20	
71	T1	ABCCUS	1	RCPT	A	2002-08-16	4.92	
81	T1	ABCCUS	1	RCPT	A	2002-08-22	192.68	
82	T1	ABCCUS	1	RCPT	D	2002-08-29 11:50:00	0	
82	T1	ABCCUS	1	RCPT	A	2002-10-06	61.50	

Invoice Search Results

- 4 Click on the invoice that you wish to look up. Preferred Online will display the Invoice Detail page showing complete information for the invoice.

Administration	Order Search	Receipt Search	Inventory Search	Item Search	Invoice Search
----------------	--------------	----------------	------------------	-------------	----------------

Invoice Detail			
INVOICE INFORMATION			
Company Code:	T1	Customer Name:	ABC Custom Foods
Invoice Number:	87	Invoice Date:	10.06.2002
Invoice Prefix:	1	Invoice Amount:	61.50
Invoice Type:	RCPT	Invoice Status:	A
Image:		Invoice Image:	DETAILS

Invoice Detail Screen

- 5 Click on the Invoice Image button to view/print the original invoice in Adobe Acrobat Reader.



Scheduling Reports

The function of scheduling reports allows you to set the time, date, and frequency you receive a specific report (lookup query) by e-mail. For example you can lookup an open order report and schedule that report to be sent to your e-mail account, every Monday at 10 am for the next month.

Administration Order Search Receipt Search Inventory Search Item Search Invoice Search

Create Scheduled Query (Order Search)

GENERAL

Account Name: ABC Customer

Scheduling Description:

cc Addresses:

Add --Schedule cc List-- Delete

Scheduling Activation Date: December 01 2003

Scheduling Expiry Date:

Frequency: Every Day

Time: 12:00

Output Format: ☒ CSV ☐ HTML

Save Search Scheduled Queries Return to Search Option Clear cc List

Schedule Query Screen

Account Name – Your account name will appear in this field as a default. The only time you would be able to change this field is if you had an affiliated account or sister company assigned with your usercode and password.

Scheduling Description: Enter the title of your report here.

cc Address: Enter any additional e-mail addresses here and then click on the Add link below to add to the schedule cc list. *NOTE: The e-mail account in the administration tab will also receive this report. To view this e-mail address go to the Administration Tab and select Edit Settings.*

Scheduling Activation Date: Select the date you would like to start receiving the report.

Scheduling Expiry Date: Select the date you would like to terminate receiving the report.

Frequency: Select the how often you would like to receive the report.

Time: Select the time of day you would like to receive the report.
NOTE: Military Time.

Output Format: Select the format you would like to receive the report in: **CSV**- Excel format, **HTML** – the way your screen displays the report

Scheduling Report Procedure

- 1 Select a tab and enter the search criteria, ie.

Order Search

Receipt Search

Inventory Search

- 2 Scroll down to the bottom of the screen and click on the Scheduling Button
- 3 The screen “create Schedule Query Screen” will appear, enter your information
- 4 Click on the Save Button
- 5 The e-mail will automatically go to the e-mail address on your account, to view this e-mail account go to the administrator tab and click on Show Configuration button. Use the Edit Your Settings to change the e-mail address
- 6 You can view all scheduled queries and delete them at any time using the Search Scheduled Queries button



Printing a Query

You can print any Preferred Online page by means of the Print function of your browser. You can print the search page in which you enter your search criteria, the search results page(s) and any detail pages related to your search.

- 1** Display the page that you wish to print.
- 2** Click on the File option in the Upper Right hand corner
- 3** Select the print option from the pop down menu
- 4** Select all pages or a specific range of pages.
- 5** Click OK to print.



Technical Support

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