



## How to Upgrade your Website to Version 4.0 in Ten Easy Steps

The following steps will take you through the process of upgrading your website, from signing up, to going live with your newly upgraded eFoodUSA-powered website:

1. You may sign-up for the **FREE** Version 4.0 Upgrade by sending an "official request" e-mail to [signupv4@efoodusa.com](mailto:signupv4@efoodusa.com).
2. eFoodUSA will reply with a confirmation e-mail, also providing you with information about valuable resources for the upgrade, and you will be added to the queue list.
3. You may visit the Client Resources Section at [www.efoodusa.com](http://www.efoodusa.com) where you will not only find the most descriptive details about the Version 4.0 website enhancements, but also useful marketing downloads, such as customizable flyers which can be generated online
4. eFoodUSA will send a Marketing Packet via postal mail to introduce Version 4.0, which includes a demo CD, website enhancement details, and marketing ideas
5. When it is your company's turn on the queue list, an eFoodUSA Representative will contact you to begin the rollout of your website to version 4.0. At this time, you will be provided with a checklist to complete as you follow the process of the upgrade. This checklist will also provide us with information needed to utilize some of the new options.



**Learn more about Version 4.0 and promote your new website with a multitude of marketing tools found in the Client Resources Section.**

6. eFoodUSA will create a copy of your live website, which will be upgraded and utilized for testing, while your existing site remains for your customers' regular usage without interruption.
7. You may choose a color scheme for your new website and schedule holiday and/or seasonal themes, if desired. A favicon will be created and added to your Version 4.0 test website for your approval.
8. An eFoodUSA Representative will contact you to schedule a training session. This session should include everyone who is involved with website—credit manager, IT, sales manager, marketing dept., etc.
9. There are no changes to the current file spec, so once the website copy is created, you may thoroughly test your upgraded website until you are familiar with the new enhancements and are satisfied that your data is displaying properly. Your checklist will also assist in pointing out important areas to verify.
10. Once eFoodUSA receives the completed checklist, and all testing is reported as satisfactory, then the newly upgraded website will be scheduled to go LIVE!

The entire rollout process should take about 2-3 weeks for the Version 4.0 Upgrade to be applied to your eFoodUSA-powered website, tested thoroughly, and allowed to go live for your customers to utilize. If you have any questions, or would like more information, please contact Heather at 847-888-3202 ext. 202 or [heatherh@efoodusa.com](mailto:heatherh@efoodusa.com) or Jim at ext. 210 or [jimw@efoodusa.com](mailto:jimw@efoodusa.com).

### In The News:

- *eFoodUSA attended the Fox River Foods Vendor Appreciation Day on July 11, 2006 in Aurora, IL.*
- *eFoodUSA is busy rolling out the Version 4.0 upgrade to our first sets of sign-ups*
- *Sign up or edit your preferences on how you want to receive your Quarterly Newsletter, and view past issues online at [www.efoodusa.com](http://www.efoodusa.com) in the Quarterly Newsletter section!*

### Inside this issue:

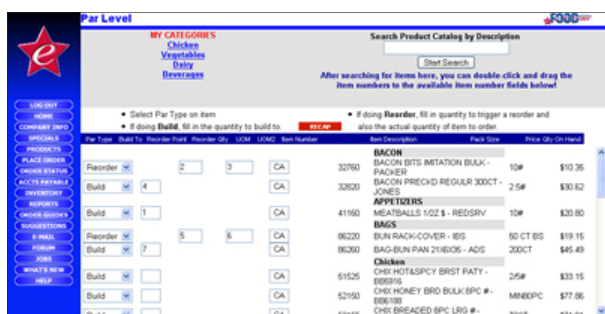
Feature Focus:	2
Par Levels & Standing Orders	
E-Mail Extraction	3
Tech Corner: Emoticons	3
New Color Scheme Themes	3
From the President's Desk	3-4

## Feature Focus: Par Levels & Standing Orders

This issue's feature focus is about a new pair of features found in Version 4.0, developed to optimize order entry. Par Levels and Standing Orders both have the ability to add items to an order according to a pre-determined list.

First, let's explore Par Levels. Both "Build To" and "Reorder Quantity and Point" par level types are available to use on Version 4.0 of an eFoodUSA-powered website. When used in conjunction with Inventory, Par Levels can create dynamic orders fast, easy and efficiently.

The "Build To" option allows you to determine an amount of certain products that you wish to always have on hand. For example, if you want to have 5 cases of one item always in stock, you would enter a "5" in the "Build To" field of that item. Then, when you create your Inventory, and you find you have 3 cases in stock, you would enter a "3" for your inventory. When you create a Par Level order at the end of your inventory (an optional button will be available on the Recap Inventory screen to create a Par Level Order), your order would have 2 cases automatically entered on your order, thus *building to* that pre-determined quantity of 5 which you entered in your Par Levels. This feature also works with partial cases. If you were to enter "1.5" for the quantity in your inventory, your Par Level order would round up and have 4 cases entered for that item on your order, so that you would have at least 5 cases total on hand.



Both "Build To" and "Reorder Quantity and Point" par level types are available on Version 4.0 eFoodUSA-powered websites.

The "Reorder Quantity and Point" option is another useful par level option, and may be used in addition to your "Build To" quantities for other items. With this feature, you may enter a Reorder Quantity, which would be the number of cases you would want to order, and a Reorder Point, which would be the quantity amount at which your inventory count would have to be at or below for your Reorder Quantity to be added to your order. For example, if you enter "5" for your Reorder Quantity and "2" for your Reorder Point, and you

enter a "1" for the quantity in your Inventory, your Par Level order would have 5 cases automatically entered for that item. However, if you entered a "3" for quantity in your Inventory, nothing would be added to your order for that item since you are above your Reorder Point.

The Standing Order feature, on the other hand, is more of a static option compared to Par Levels. With this feature, you may enter set quantities for particular items to be added to your order each time your "Standing Order" is included in your order.



Pre-determined quantities and items may be set in a Standing Order to be included with any order place online through your eFoodUSA-powered website.

Once created, you may include Standing Order items on your order by selecting the "Yes" option under the "Create Standing Order" heading found on the New Order screen in the Place Order section. For even more flexibility, Standing Order items can also be added to your order from the Specials section if special items have been added to your order, and you decide to go to order entry directly from the Specials Confirmation screen. If a Standing Order has been created, you will be given the option to include these items, along with your special items, by selecting a checkbox found beneath the order guide selection menu for product entry. Similarly, in the Products section, after you have added items to your order from the search results, the Products Recap screen will also have the checkbox option to include Standing Order items if you decide to go directly to order entry from this screen.

Both Par Levels and Standing Orders can be set up in advance and used repeatedly for placing quick repeat orders, saving you valuable time. Also, both are editable for changing menus, whether you edit the quantities within the Par Level or Standing Order sections and save the changes, or you edit within the Order Entry section for a temporary change in quantity or the addition of further items.





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## From the President's Desk

By: **Jim Whetstone**

*(...continued from page 3)*

the reporting history range, one-step order guide creation, sending personal order guides to colleagues, limitless manual order entry with auto-populating descriptions at the time of item number entry and many, many more refinements along the way. Some refinements actually trick the browser to work differently than it should – The TAB key now moves straight down the quantity column. This is something many of you have requested for quite awhile now. Hats off to our development team! This is in addition to all the behind the scenes improvements to the website processes that make the site tick. There is a great listing in the Client Resources Section of most of the enhancements that can be seen. When you click on any of them, an explanation of the enhancement displays!

Speaking of the Client Resources Section, there is a great new addition there, that many people are missing and you owe it to yourself not to miss it! It is the customizing tool that allows you to personalize any of our three different area-of-emphasis brochures with your logo and other pertinent info and produce a high quality brochure document that you can take to a local printer or if you even have a moderate ink-jet printer and some glossy brochure

**“... over the last, almost seven years, the site has gone from a simple order entry site to a full-fledged compilation of many tools ...”**

paper, you can print them out and use as needed. Great when you are going to see a new customer the next day! There are samples of these brochures in the fantastic new tri-fold Marketing Kit that a distributor receives in advance of their conversion, but some people miss that they are samples of what you can personalize.

I know the steps of the conversion are laid out elsewhere in this newsletter, but I want to add my two cents. Please realize that there is a direct benefit to getting the site converted – Many more value-added services for the operator customer on all levels. It is also important that once you start the conversion process, that you need to finish it in the anticipated two weeks. There are other distributors in the queue that are anxiously waiting for you to finish. If your time comes up to start and you have a Food Show, new employee in the department, vacation, moves or other complications, let us know and we will conveniently flip you with the next distributor in the queue. If you have not signed up for the queue list, and you know who you are, mention any “black-out” times at the time and we will make note of it. And one last little secret that I will tell only to you, let's schedule our “Get-Acquainted” Session early in the schedule. It is tough to get everyone (IT, sales and multi-unit management, credit, HR and marketing) that needs to attend scheduled at the same time, and it seems the earlier in the process we do it, the better it is from a scheduling and understanding perspective.