

eServ Web Ordering User Documentation

Michael Amodeo
Version 7.9.4





Table of Contents

| | | |
|--------|--|----|
| 1. | Introduction | 4 |
| 1.1. | Key Features | 4 |
| 2. | Log into Web Ordering System | 4 |
| 2.1. | Home Page | 5 |
| 2.1.1. | Announcements | 5 |
| 2.1.2. | Last Order Placed | 6 |
| 2.1.3. | Recent Orders | 6 |
| 3. | Orders Menu Options | 6 |
| 3.1. | Guide Order | 6 |
| 3.1.1. | Default vs. Optional Custom Order Guide | 7 |
| 3.1.2. | Creating an Order Using an Order Guide | 7 |
| 3.1.3. | Optional Feature: Using Build-To (PAR) Lists | 9 |
| 3.2. | Quick Order | 10 |
| 3.2.1. | Creating a Quick Order | 10 |
| 3.3. | Order History | 13 |
| 3.4. | Entry Form | 15 |
| 3.4.1. | Printing an Order Entry Form - Default Order Guide | 15 |
| 3.4.2. | Printing an Order Entry Form - Custom Order Guide | 16 |
| 3.5. | Upload Order | 17 |
| 3.5.1. | Uploading a New Draft Order | 17 |
| 4. | Order Guide Menu Options | 19 |
| 4.1. | View Order Guide | 19 |
| 4.1.1. | Viewing a Default Order Guide | 19 |
| 4.1.2. | Viewing a Custom Order Guide | 20 |
| 4.2. | Managing your Custom Order Guide | 21 |
| 4.2.1. | Viewing a Default Order Guide | 21 |
| 4.2.2. | Viewing a Custom Order Guide | 21 |
| 4.2.3. | Customizing Your Order Guide | 22 |
| 4.2.4. | Build-To (PAR) Lists | 24 |
| 4.2.5. | Cloning Your Custom Order Guide and-or Build-To List | 27 |
| 5. | Invoices Menu Options | 29 |
| 5.1. | Viewing your Invoices | 29 |
| 6. | Admin Menu Options | 30 |
| 6.1. | Managing your Users | 30 |
| 6.1.1. | Creating a New User | 31 |
| 6.1.2. | Editing an Existing User | 32 |
| 6.1.3. | Edit User Assignments | 32 |
| 7. | Additional Features | 33 |
| 7.1. | Resetting your Password | 33 |
| 7.2. | Setting Account Preferences | 35 |
| 7.2.1. | Additional Order Confirmation Emails | 35 |
| 7.2.2. | Account Permissions | 36 |
| 7.3. | Frequently Asked Questions | 37 |
| 7.4. | Logout | 37 |
| 7.4.1. | Internet Explorer® | 37 |
| 7.4.2. | Other Supported Browsers | 38 |
| 7.5. | Close Browser | 38 |



Table of Figures

| | |
|---|----|
| Figure 1: https://www.mbmeserv.com | 4 |
| Figure 2: Home Page, District Managers. Managers and Users | 5 |
| Figure 3: Home Page, Customer Validated..... | 5 |
| Figure 4: Home Page, Announcements | 5 |
| Figure 5: Home Page, Last Order Placed..... | 6 |
| Figure 6: Home Page, Recent Orders | 6 |
| Figure 7: Default Order Guide Order, No Build-To List..... | 7 |
| Figure 8: Order Submission Confirmation | 8 |
| Figure 9: Order Confirmation Email..... | 9 |
| Figure 10: Default Order Guide with Build-To List..... | 9 |
| Figure 11: Orders, Quick Order | 10 |
| Figure 12: Order Preview | 11 |
| Figure 13: Order Draft, Print..... | 12 |
| Figure 14: Order Confirmation..... | 12 |
| Figure 15: Order Confirmation Email | 13 |
| Figure 16: Orders, Order History, View Order | 13 |
| Figure 17: Orders, Order History, Order History Details | 14 |
| Figure 18: Orders, Order History, Order History Details, Print..... | 14 |
| Figure 19: Orders, Order History, Copy Order | 15 |
| Figure 20: Order Entry Form - Default Order Guide, with no Build-To List..... | 16 |
| Figure 21: Order Entry Form - Default Order Guide, Build-To List | 16 |
| Figure 22: Order Entry Form - Custom Order Guide, no Build-To List..... | 16 |
| Figure 23: Order Entry Form - Custom Order Guide, Build-To List | 17 |
| Figure 24: Upload Order | 18 |
| Figure 25: Upload Order, Browse and Select File | 18 |
| Figure 26: Upload Order, Process Confirmation..... | 19 |
| Figure 27: Viewing a Default Order Guide | 20 |
| Figure 28: Viewing a Custom Order Guide | 21 |
| Figure 29: Order Guide, Manage Custom Order Guide | 21 |
| Figure 30: Create New Custom Category..... | 22 |
| Figure 31: Reorder Custom Category | 23 |
| Figure 32: Add items to Custom Category | 23 |
| Figure 33: Reorder Items in a Custom Category..... | 23 |
| Figure 34: Create new Build-To List | 24 |
| Figure 35: Complete/Edit Default Build-To List..... | 24 |
| Figure 36: Create new Build-To List | 25 |
| Figure 37: Complete/Edit Custom Build-To List..... | 26 |
| Figure 38: Edit Existing Custom Order Guide | 26 |
| Figure 39: Cloning Functionality, No Legend | 27 |
| Figure 40: Cloning Results,..... | 28 |
| Figure 41: Cloning Legend..... | 28 |
| Figure 42: View Invoices..... | 29 |
| Figure 43: Invoice Search Results | 29 |
| Figure 44: View Invoice Details | 30 |
| Figure 45: Admin Menu, User Management | 31 |
| Figure 46: Create New User..... | 31 |
| Figure 47: User Listing | 32 |
| Figure 48: View User Details | 32 |
| Figure 49: User Listing | 33 |
| Figure 50: Edit Customer Assignments..... | 33 |
| Figure 51: forgot password..... | 34 |
| Figure 52: Password Reset User Name | 34 |
| Figure 53: Password Reset Security Answer | 34 |
| Figure 54: my profile, User Preferences | 35 |
| Figure 55: Additional Order Confirmation Emails | 36 |
| Figure 56: Account Permissions..... | 36 |
| Figure 57: Frequently Asked Questions..... | 37 |
| Figure 58: Page Footer, Close Browser | 38 |

1. Introduction

McLane Company, Inc. has developed a web-based customer portal to improve restaurant operator efficiency and accuracy in order creation/submission as well as to provide timely information regarding items, orders and invoices. This document is intended to assist restaurant operators in the implementation and usage of eServ. This is a living document and is subject to changes and updates as needed.

1.1. Key Features

- Easy to use
- Web based, no software to install
- Mobile device capable (tablets, smart phones)
- Secure environment
- Owner operator ability to administer security for their restaurants
- Notification of new and deleted items
- System wide announcements
- Default order guide always up to date
- Custom order guide allows for organizing products in a way to suit each restaurant
- User defined “Build-To” (PAR) lists for automating order quantities based on supplied inventory levels
- Order preview with validations before submission
- Emailed Order confirmation.
- Order Guide export to both Text and Excel file formats
- Invoice data export both Text and Excel file formats
- View and print actual invoice data (and credits) before delivery
- IE Kiosk Mode
- The ability to clone a Custom Order Guide and-or Build-To List from a source customer to multiple customers
- The ability to identify secondary email addresses that will receive the emailed Order Confirmation.
- The ability to select and upload a pre-populated order file and to save it in eServ as a New Draft Order.

Note: all functionality described herein may not be available to all users. A feature of this system is the ability to control access to certain functionality based on the role assigned to the user during user enrollment.

2. Log into Web Ordering System

1. Go to the McLane Customer Portal website <https://www.mbmесerv.com>.



The screenshot shows the McLane Customer Portal login page. At the top, there is a blue header with the McLane logo. Below the header, the page is titled "Log In". There are two input fields: "User Name" with the text "mymanager" and "Password" with masked characters. Below the password field is a "Log In" button and a link for "forgot password?". To the right of the input fields, there is a welcome message: "Welcome to McLane's customer website. As a valued customer, we are always looking for ways to improve our services to you. Please Log In." At the bottom of the page, there is a footer with copyright information: "Copyright ©2016 McLane Company, Inc. All rights reserved contact us | terms of use | privacy policy | version: 7.9.4".

Figure 1: <https://www.mbmесerv.com>

2. Enter your "User Name" and "Password" and then click .
3. Once logged into the Web Ordering System you will be presented with the Home Page.

2.1. Home Page

1. Select your McLane customer number then click .

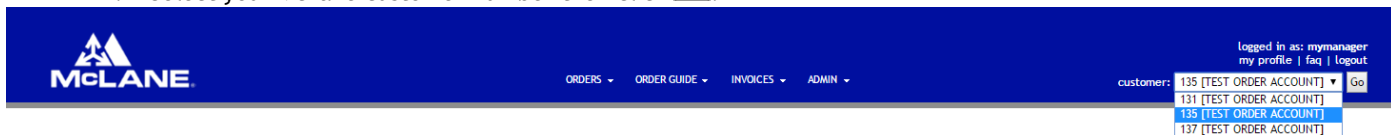


Figure 2: Home Page, District Managers, Managers and Users

2. Once your customer number is validated the Home page will display information that is specific to your customer number.

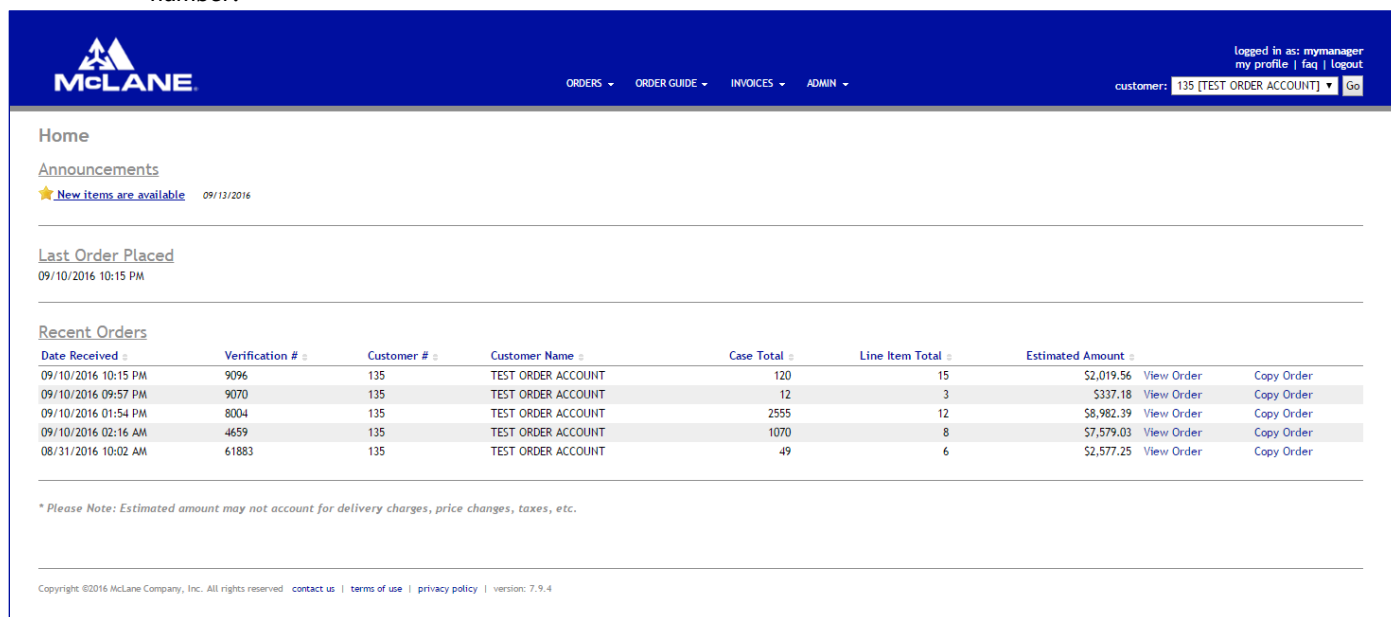


Figure 3: Home Page, Customer Validated

2.1.1. Announcements

This section is used to display important messages or system wide notifications. It is also used to notify the user when there are new items available to order. Currently only an Administrator can create Announcements.

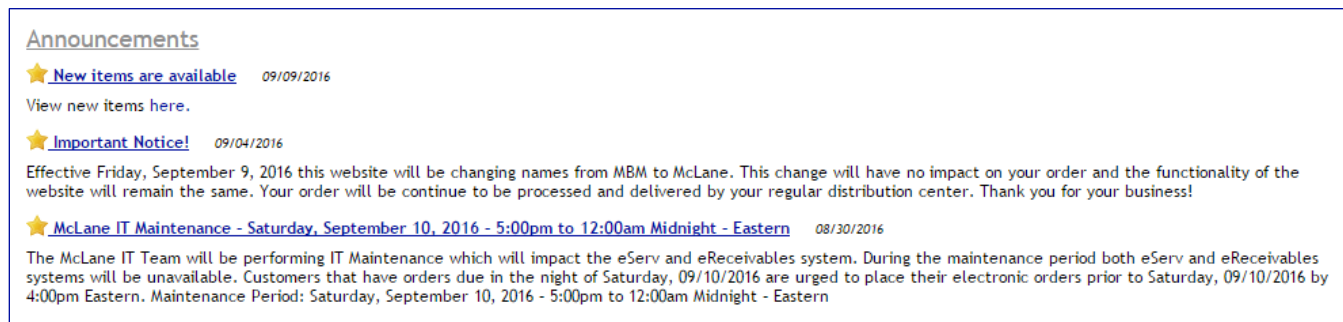


Figure 4: Home Page, Announcements

2.1.2. Last Order Placed

This section will display the date and time of the last order that was placed using the Web Ordering System.

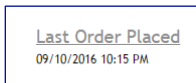


Figure 5: Home Page, Last Order Placed

2.1.3. Recent Orders

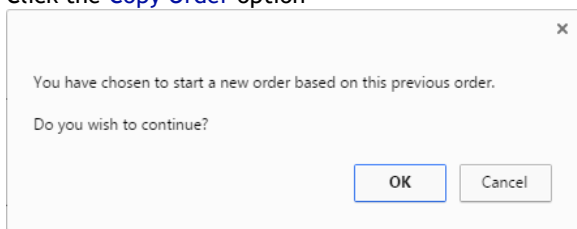
In this section a list of recently submitted orders is displayed.

| Date Received | Verification # | Customer # | Customer Name | Case Total | Line Item Total | Estimated Amount | | |
|---------------------|----------------|------------|--------------------|------------|-----------------|------------------|----------------------------|----------------------------|
| 09/10/2016 10:15 PM | 9096 | 135 | TEST ORDER ACCOUNT | 120 | 15 | \$2,019.56 | View Order | Copy Order |
| 09/10/2016 09:57 PM | 9070 | 135 | TEST ORDER ACCOUNT | 12 | 3 | \$337.18 | View Order | Copy Order |
| 09/10/2016 01:54 PM | 8004 | 135 | TEST ORDER ACCOUNT | 2555 | 12 | \$8,982.39 | View Order | Copy Order |
| 09/10/2016 02:16 AM | 4659 | 135 | TEST ORDER ACCOUNT | 1070 | 8 | \$7,579.03 | View Order | Copy Order |
| 08/31/2016 10:02 AM | 61883 | 135 | TEST ORDER ACCOUNT | 49 | 6 | \$2,577.25 | View Order | Copy Order |

Figure 6: Home Page, Recent Orders

If you wish to use one of the recent orders as a beginning for a new order:

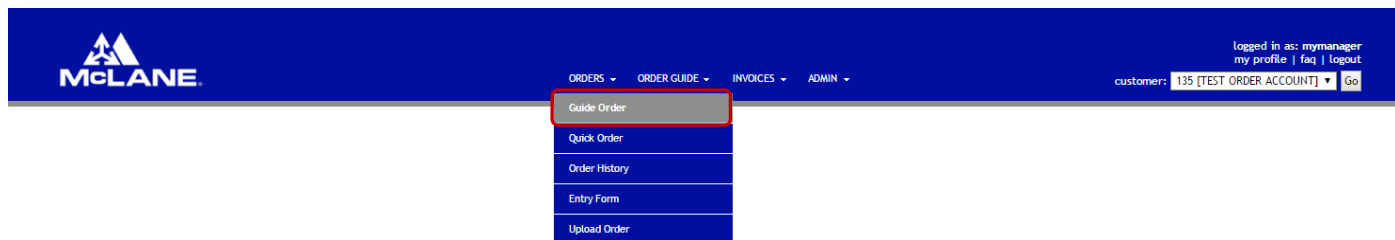
1. Click the [Copy Order](#) option



2. If you wish to confirm the Copy process click . This will save the copied order as a new Draft Order that will then be available to edit or modify as needed.
3. If you wish to cancel the Copy process click .

3. Orders Menu Options

3.1. Guide Order



Selecting **Orders > Guide Order** presents an order guide form consisting of all items available for order by the current customer. Items on the order form can be sorted using any column by clicking on the column heading. Items can be filtered by category and items can be located using the **Search** box. As quantity is entered for each item to be ordered the extended price is updated (price is subject to change before order is invoiced). The system also ensures the quantity specified adheres to any defined validation rules.

3.1.1. Default vs. Optional Custom Order Guide

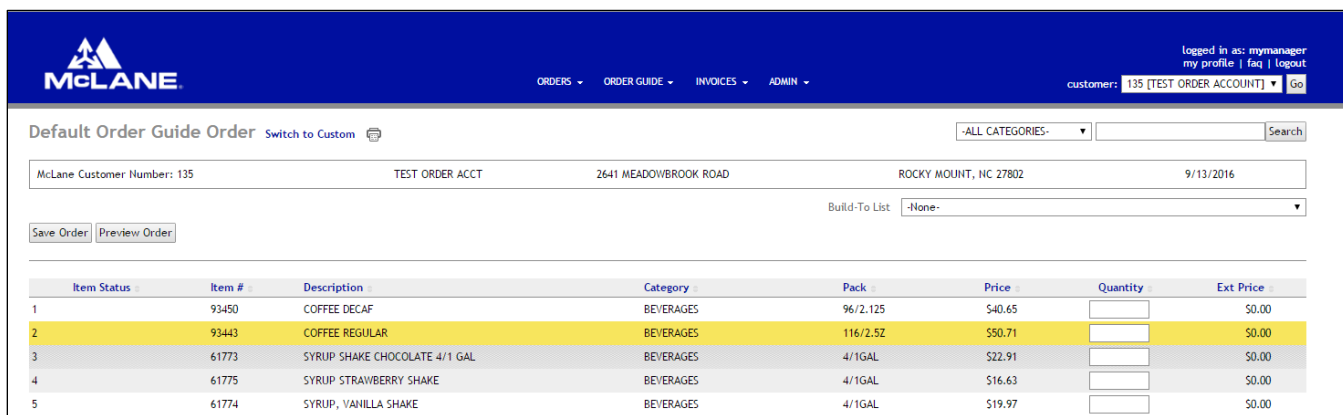
3.1.1.1. Default Order Guide

Unless a custom order guide is created (see Managing Your Custom Order Guide) the default order guide will be used with the order form. The default order guide is an electronic version of the original paper order guide. It contains all items available for ordering that are authorized by your home office. This order guide is organized by the categories supplied and assigned by your home office. When displayed the items are sorted by category, McLane’s inventory classification code, then item number. The default order guide requires no maintenance from you. It is always up to date because it is dynamically updated as items are maintained in the McLane system. When using the default order guide, Default Order Guide Order is displayed in the upper left portion of the form. Optional Build-To lists containing Par values can be used in conjunction with the default order guide to enhance ordering accuracy. See Build-To (PAR) Lists under Managing Your Custom Order Guide for more information on Build-To Lists.

3.1.1.2. Custom Order Guide

For customers that require an order guide with a different appearance than the home office defined version the order guide can be uniquely customized by customer. Only one custom guide can exist per customer. New item categories can be defined and sequenced as needed. Items are then assigned to categories and sequenced via drag and drop. Items can be excluded from appearing on the order guide. If a custom order guide exists you have the option of placing orders using either the default or custom guide. When using the custom order guide, Custom Order Guide Order is displayed in the upper left portion of the form. **Custom order guides must be regularly maintained.** New items appear in the unassigned category and must be assigned to your appropriate custom category. Optional Build-To lists containing Par values can be used in conjunction with the default order guide to enhance ordering accuracy. See Build-To (PAR) Lists under Managing Your Custom Order Guide for more information on Build-To Lists.

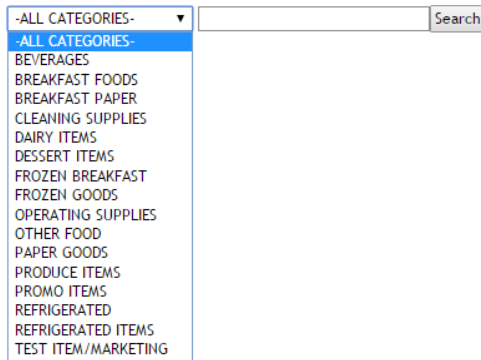
3.1.2. Creating an Order Using an Order Guide



| Item Status | Item # | Description | Category | Pack | Price | Quantity | Ext Price |
|-------------|--------|-------------------------------|-----------|----------|---------|----------|-----------|
| 1 | 93450 | COFFEE DECAF | BEVERAGES | 96/2.125 | \$40.65 | | \$0.00 |
| 2 | 93443 | COFFEE REGULAR | BEVERAGES | 116/2.52 | \$50.71 | | \$0.00 |
| 3 | 61773 | SYRUP SHAKE CHOCOLATE 4/1 GAL | BEVERAGES | 4/1GAL | \$22.91 | | \$0.00 |
| 4 | 61775 | SYRUP STRAWBERRY SHAKE | BEVERAGES | 4/1GAL | \$16.63 | | \$0.00 |
| 5 | 61774 | SYRUP, VANILLA SHAKE | BEVERAGES | 4/1GAL | \$19.97 | | \$0.00 |

Figure 7: Default Order Guide Order, No Build-To List

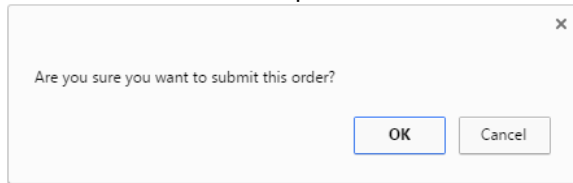
1. Click the Orders menu option. In the event that a pre-existing “Draft Order” exists it will be loaded into the form with the understanding that it is going to be completed.
2. Enter quantity for the items you wish to order. Use the [TAB] key or [ENTER] key to position the cursor on the next item.
3. The Order Guide displays 50 items per page.
4. Filter the items that are displayed by selecting one of the categories from the dropdown list.
5. Search for a specific item by entering search criteria in the Search box then click the Search button. Criteria entered are used to search for partial and complete matches within the Item#, Description and Category columns.



6. To Save the Order press the button. Upon successful save you will see a confirmation notification.
 - ✔ **Order Draft successfully saved.**
7. To Preview the Order press the button.

If you preview the Order, you then have the additional options:

8. To modify the existing Draft Order press the [Edit Order](#) option.
9. To Delete the Draft Order press the [Delete Order](#) option.
10. To Submit the Draft Order press the button.



11. If you wish to confirm the submission process click button.
12. If you wish to cancel the submission process click button.

On successful submission you will see a confirmation notification.

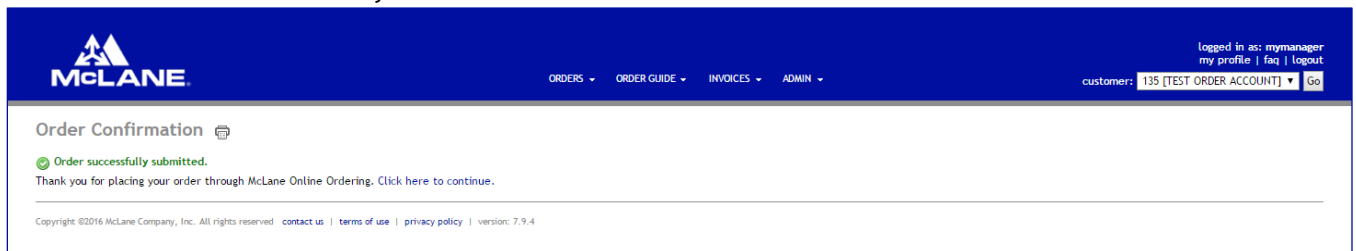
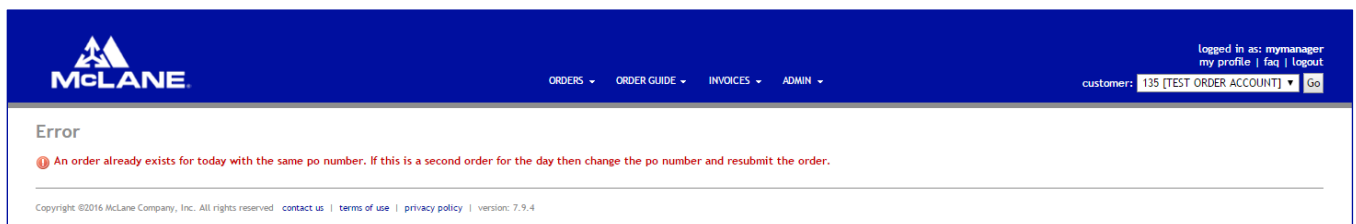


Figure 8: Order Submission Confirmation

Note: If the current customer has already submitted for the current date, and with the same PO Number, then the following error message will be displayed.



Hello My,

This email is confirm that your order has been received. Please do not reply to this email. For more information, please go to www.mbmeserv.com

Order Confirmation

Thank you for placing your order through McLane Online Ordering.

Order Summary:

| | | | |
|----------------------|----------------------------------|---|----------------------------|
| PO Number: 0 | Order Date: 9/13/2016 3:53:05 PM | Total Line Items: 3 | Total Order Quantity: 12 |
| Customer Number: 135 | TEST ORDER ACCT | Shipping Address: 2641 MEADOWBROOK ROAD ROCKY MOUNT, NC 27802 | Estimated Amount: \$337.18 |

Order Details:

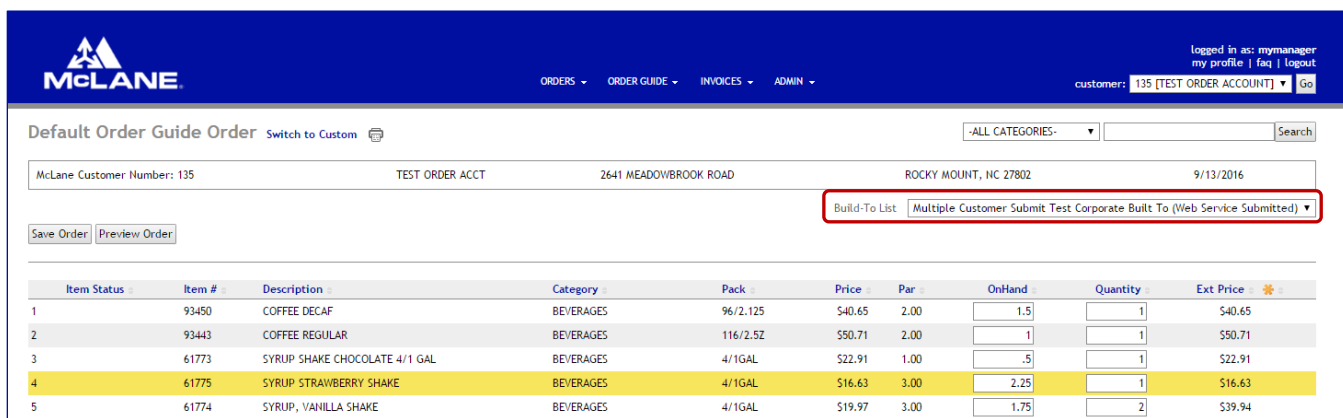
| Line | Item Number | Category | Description | Item Pack | Quantity | Extended Price |
|------|-------------|-----------------|----------------------|-----------|----------|----------------|
| 1 | 20883 | BREAKFAST FOODS | GRAVY INSTANT PEPPER | 32/13.5Z | 3 | \$74.73 |
| 2 | 61774 | BEVERAGES | SYRUP, VANILLA SHAKE | 4/1GAL | 5 | \$99.85 |
| 3 | 93450 | BEVERAGES | COFFEE DECAF | 96/2.125 | 4 | \$162.60 |

* Please Note: Estimated amount(s) may not account for delivery charges, price changes, taxes, etc.

Figure 9: Order Confirmation Email

3.1.3. Optional Feature: Using Build-To (PAR) Lists

The Build-To feature allows order quantities to be calculated based on pre-defined build-to quantities and on hand inventory. One or more Build-To lists containing desired inventory level by item can be defined. Within the order guide form a Build-To list is selected. As on hand inventory, in cases, is entered for each item, order quantity is calculated as Build-To quantity less Inventory quantity. Order quantity can be overridden manually. The Build-To List must exist prior to order placement. If no Build-To list exists there will be no drop down list as pictured. See Build-To (PAR) Lists under Managing Your Custom Order Guide for information on creating Build-To Lists.



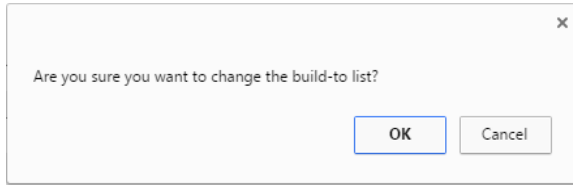
The screenshot shows the McLane web application interface. At the top, there is a navigation bar with the McLane logo and menu items: ORDERS, ORDER GUIDE, INVOICES, and ADMIN. On the right, it shows the user is logged in as 'mymanager' and the current customer is '135 (TEST ORDER ACCOUNT)'. Below the navigation bar, the page title is 'Default Order Guide Order' with a 'Switch to Custom' button. A search bar is also present. The main content area displays order details for 'McLane Customer Number: 135' and 'TEST ORDER ACCT'. A 'Build-To List' dropdown menu is highlighted with a red box, showing the selected option: 'Multiple Customer Submit Test Corporate Built To (Web Service Submitted)'. Below this, a table lists items with columns for Item Status, Item #, Description, Category, Pack, Price, Par, OnHand, Quantity, and Ext Price. The table contains 5 items, with the 4th item (SYRUP STRAWBERRY SHAKE) highlighted in yellow.

Figure 10: Default Order Guide with Build-To List

1. Click the Orders menu.
2. Select a Build-To List from the available entries in the drop down box. If the Build-To drop down box does not exist this means no Build-To lists have been created.

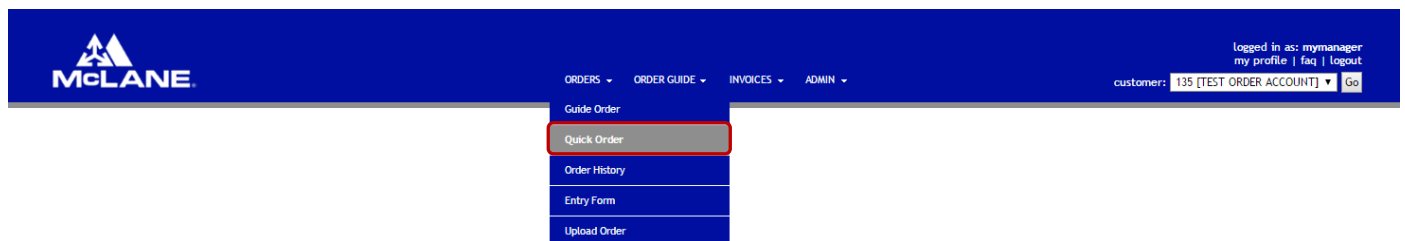
Build-To List

- Multiple Customer Submit Test Corporate Built To (Web Service Submitted) ▼
- None-
- Multiple Customer Submit Test Corporate Built To (Web Service Submitted)
- Sample 1
- Sample 2
- Sample 3
- Sample 4 (default)



3. To confirm the change to use a Build-To List click .
4. To cancel click .
5. Enter your inventory, as whole cases, in the on hand column for each item. Quantity is automatically calculated but can be overridden by keying desired order quantity in the Quantity column.
6. Complete your order as described in the section above.

3.2. Quick Order



The Quick Order Guide allows for the user to quickly and simply enter both Item Numbers and Quantities for an order in a direct and efficient manner. All Item Numbers are confirmed and all quantities are validated against maximum values before processing. The user has the ability to define the number of Items to view per page with a default value of 50 displayed.

3.2.1. Creating a Quick Order

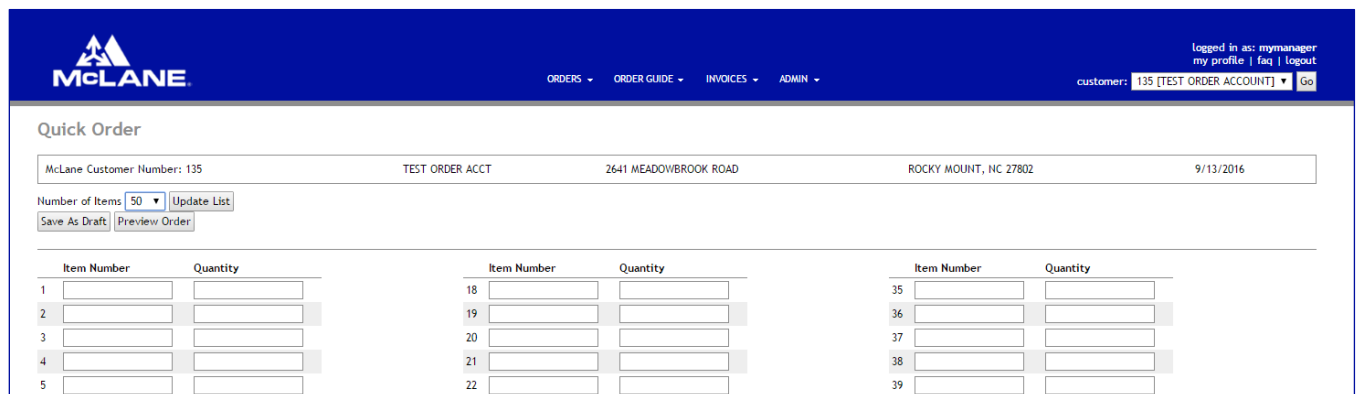
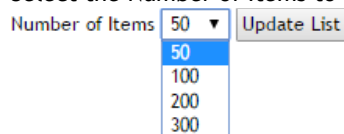
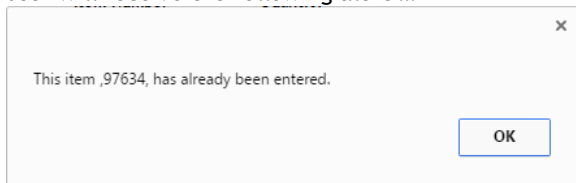


Figure 11: Orders, Quick Order

1. Click Orders
2. Click Quick Order
3. Select the Number of Items to be viewed (50, 100, 200, 300) and press the button.



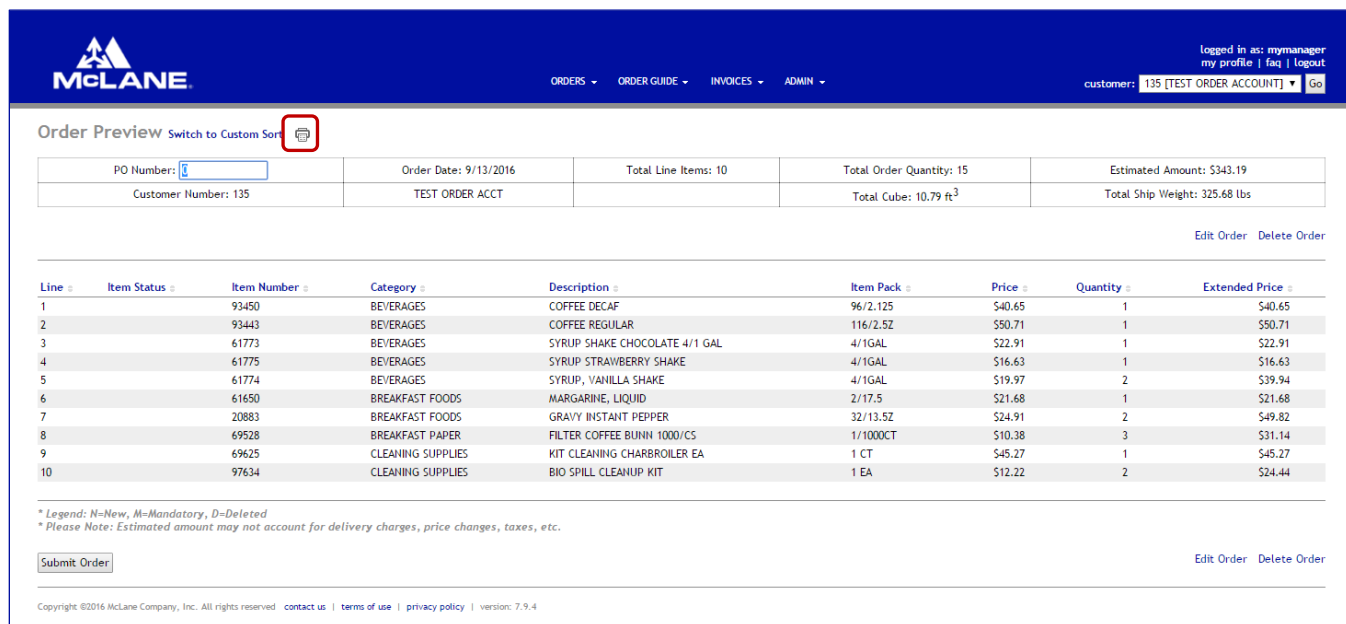
4. Enter a valid Item in the Item Number field and press the [ENTER] or [TAB] key. The system will automatically validate the Item Number that you entered and ensure that it has not previous been entered. If it has then the user will receive the following alert ...



When you click the [OK] button then the alert will clear the Item Number that was just entered and highlight the Item Number that had been duplicated.

5. Enter a valid Quantity and press the [ENTER] or [TAB] key. The system will automatically take you to the Item Number on the next line. Continue steps 4 and 5 until you have completed your order.
6. To Save the Order press the button. On successful saving you will see a confirmation notification.
✔ Order Draft successfully saved.
7. To Preview the Order press the button.

If you preview the Order, you then have the additional options:



Order Preview [Switch to Custom Sort](#)

| | | | | |
|--|-----------------------|----------------------|-----------------------------------|-------------------------------|
| PO Number: <input type="text" value=""/> | Order Date: 9/13/2016 | Total Line Items: 10 | Total Order Quantity: 15 | Estimated Amount: \$343.19 |
| Customer Number: 135 | TEST ORDER ACCT | | Total Cube: 10.79 ft ³ | Total Ship Weight: 325.68 lbs |

[Edit Order](#) [Delete Order](#)

| Line | Item Status | Item Number | Category | Description | Item Pack | Price | Quantity | Extended Price |
|------|-------------|-------------|-------------------|-------------------------------|-----------|---------|----------|----------------|
| 1 | | 93450 | BEVERAGES | COFFEE DECAF | 96/2.125 | \$40.65 | 1 | \$40.65 |
| 2 | | 93443 | BEVERAGES | COFFEE REGULAR | 116/2.5Z | \$50.71 | 1 | \$50.71 |
| 3 | | 61773 | BEVERAGES | SYRUP SHAKE CHOCOLATE 4/1 GAL | 4/1GAL | \$22.91 | 1 | \$22.91 |
| 4 | | 61775 | BEVERAGES | SYRUP STRAWBERRY SHAKE | 4/1GAL | \$16.63 | 1 | \$16.63 |
| 5 | | 61774 | BEVERAGES | SYRUP, VANILLA SHAKE | 4/1GAL | \$19.97 | 2 | \$39.94 |
| 6 | | 61650 | BREAKFAST FOODS | MARGARINE, LIQUID | 2/17.5 | \$21.68 | 1 | \$21.68 |
| 7 | | 20883 | BREAKFAST FOODS | GRAVY INSTANT PEPPER | 32/13.5Z | \$24.91 | 2 | \$49.82 |
| 8 | | 69528 | BREAKFAST PAPER | FILTER COFFEE BUNN 1000/CS | 1/1000CT | \$10.38 | 3 | \$31.14 |
| 9 | | 69625 | CLEANING SUPPLIES | KIT CLEANING CHARBROILER EA | 1 CT | \$45.27 | 1 | \$45.27 |
| 10 | | 97634 | CLEANING SUPPLIES | BIO SPILL CLEANUP KIT | 1 EA | \$12.22 | 2 | \$24.44 |


* Legend: N=New, M=Mandatory, D=Deleted
 * Please Note: Estimated amount may not account for delivery charges, price changes, taxes, etc.

[Edit Order](#) [Delete Order](#)

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Figure 12: Order Preview

8. To Save the Order as a Draft Order press the button. On successful saving you will see a confirmation notification.
✔ Order Draft successfully saved.
9. To Print the Order Click the button.

Order Preview - Draft 

[back to order preview](#)

| | | | | |
|----------------------|-----------------------|----------------------|-----------------------------------|-------------------------------|
| PO Number: 0 | Order Date: 9/13/2016 | Total Line Items: 10 | Total Order Quantity: 15 | Total Amount: \$343.19 |
| Customer Number: 135 | TEST ORDER ACCT | | Total Cube: 10.79 ft ³ | Total Ship Weight: 325.68 lbs |

| Line | Item Status | Item Number | Category | Description | Item Pack | Price | Quantity | Extended Price |
|------|-------------|-------------|-------------------|-------------------------------|-----------|---------|----------|----------------|
| 1 | | 93450 | BEVERAGES | COFFEE DECAF | 96/2.125 | \$40.65 | 1 | \$40.65 |
| 2 | | 93443 | BEVERAGES | COFFEE REGULAR | 116/2.52 | \$50.71 | 1 | \$50.71 |
| 3 | | 61773 | BEVERAGES | SYRUP SHAKE CHOCOLATE 4/1 GAL | 4/1GAL | \$22.91 | 1 | \$22.91 |
| 4 | | 61775 | BEVERAGES | SYRUP STRAWBERRY SHAKE | 4/1GAL | \$16.63 | 1 | \$16.63 |
| 5 | | 61774 | BEVERAGES | SYRUP, VANILLA SHAKE | 4/1GAL | \$19.97 | 2 | \$39.94 |
| 6 | | 61650 | BREAKFAST FOODS | MARGARINE, LIQUID | 2/17.5 | \$21.68 | 1 | \$21.68 |
| 7 | | 20883 | BREAKFAST FOODS | GRAVY INSTANT PEPPER | 32/13.52 | \$24.91 | 2 | \$49.82 |
| 8 | | 69528 | BREAKFAST PAPER | FILTER COFFEE BUNN 1000/CS | 1/1000CT | \$10.38 | 3 | \$31.14 |
| 9 | | 69625 | CLEANING SUPPLIES | KIT CLEANING CHARBROILER EA | 1 CT | \$45.27 | 1 | \$45.27 |
| 10 | | 97634 | CLEANING SUPPLIES | BIO SPILL CLEANUP KIT | 1 EA | \$12.22 | 2 | \$24.44 |

* Legend: N=New, M=Mandatory, D=Deleted
* Please Note: Estimated amount may not account for delivery charges, price changes, taxes, etc.

Figure 13: Order Draft, Print


10. To Delete the Draft Order press the [Delete Order](#) option.

11. To Submit the Draft Order press the button.

✕

Are you sure you want to submit this order?


12. To confirm the submission process click button.



logged in as: mymanager
[my profile](#) | [faq](#) | [logout](#)

[ORDERS](#) ▾ | [ORDER GUIDE](#) ▾ | [INVOICES](#) ▾ | [ADMIN](#) ▾

customer: 135 [TEST ORDER ACCOUNT] ▾


Order Confirmation 

✔ **Order successfully submitted.**
 Thank you for placing your order through McLane Online Ordering. [Click here to continue.](#)

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Figure 14: Order Confirmation

13. To cancel the submission process click button.



logged in as: mymanager
[my profile](#) | [faq](#) | [logout](#)

[ORDERS](#) ▾ | [ORDER GUIDE](#) ▾ | [INVOICES](#) ▾ | [ADMIN](#) ▾

customer: 135 [TEST ORDER ACCOUNT] ▾

Error

❗ **An order already exists for today with the same po number. If this is a second order for the day then change the po number and resubmit the order.**

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Note: If the current customer has already submitted for the current date, and with the same PO Number, then the following error message will be displayed.

Hello My,

This email is confirm that your order has been received. Please do not reply to this email. For more information, please go to www.mbmeserv.com

Order Confirmation

Thank you for placing your order through McLane Online Ordering.

Order Summary:

| | | | |
|----------------------|----------------------------------|---|----------------------------|
| PO Number: 0 | Order Date: 9/13/2016 3:53:05 PM | Total Line Items: 3 | Total Order Quantity: 12 |
| Customer Number: 135 | TEST ORDER ACCT | Shipping Address: 2641 MEADOWBROOK ROAD ROCKY MOUNT, NC 27802 | Estimated Amount: \$337.18 |

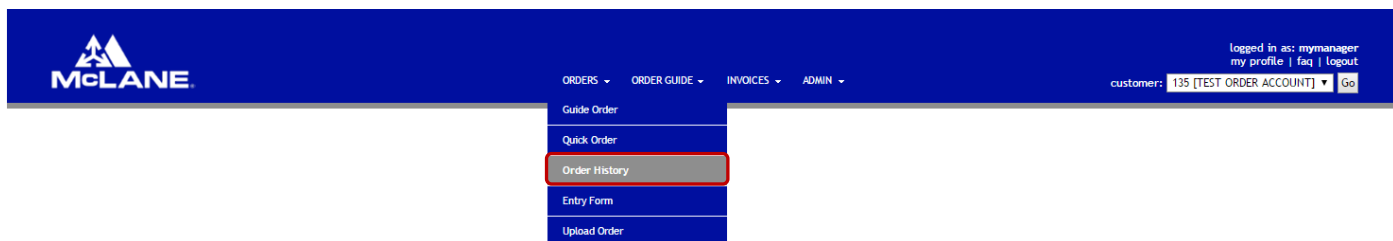
Order Details:

| Line | Item Number | Category | Description | Item Pack | Quantity | Extended Price |
|------|-------------|-----------------|----------------------|-----------|----------|----------------|
| 1 | 20883 | BREAKFAST FOODS | GRAVY INSTANT PEPPER | 32/13.5Z | 3 | \$74.73 |
| 2 | 61774 | BEVERAGES | SYRUP, VANILLA SHAKE | 4/1GAL | 5 | \$99.85 |
| 3 | 93450 | BEVERAGES | COFFEE DECAF | 96/2.125 | 4 | \$162.60 |

* Please Note: Estimated amount(s) may not account for delivery charges, price changes, taxes, etc.

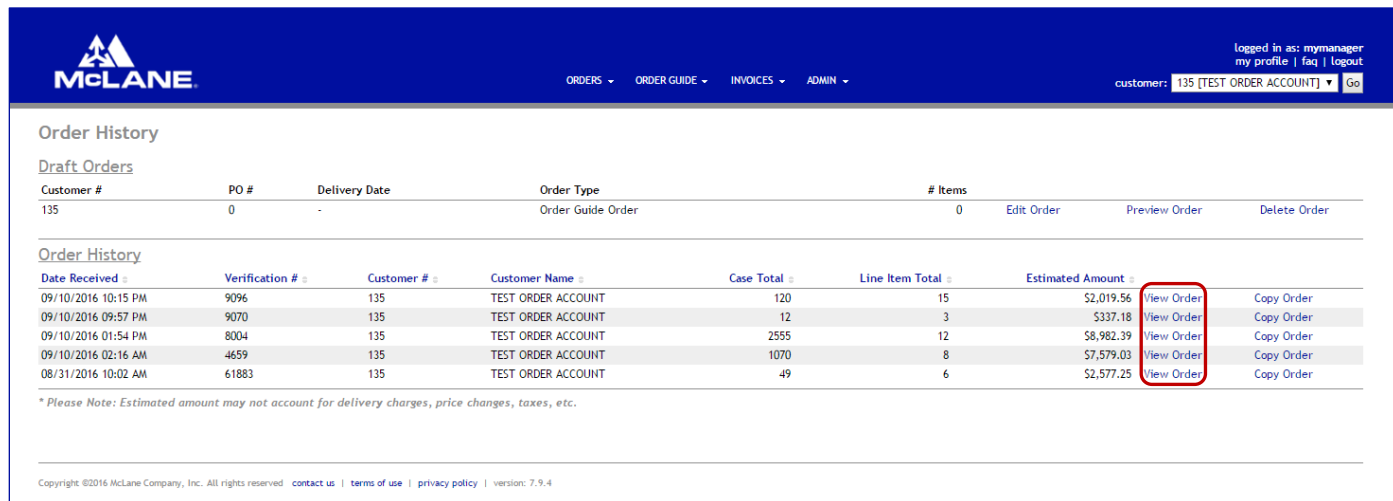
Figure 15: Order Confirmation Email

3.3. Order History



The screenshot shows the top navigation bar of the McLane website. The 'ORDERS' dropdown menu is open, and 'Order History' is highlighted with a red box. Other options in the menu include 'Guide Order', 'Quick Order', 'Entry Form', and 'Upload Order'. The user is logged in as 'mymanager' and the current customer is '135 [TEST ORDER ACCOUNT]'.

The Order History page provides the current user a listing of all successfully submitted orders for the past 14 days to the validated customer. From this page the user is provided the options of viewing the details for a selected Order or copying the selected Order into a New Order.

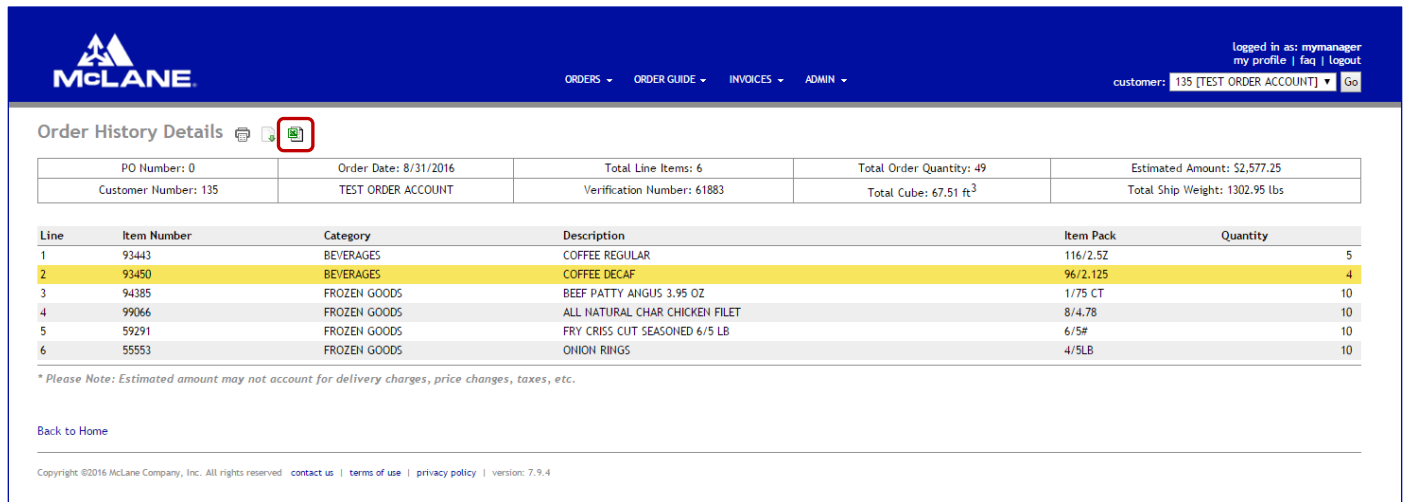


The screenshot shows the 'Order History' page. It displays a table of draft orders and a table of order history. The 'View Order' link for the most recent order (dated 09/10/2016 10:15 PM) is highlighted with a red box. The table includes columns for Date Received, Verification #, Customer #, Customer Name, Case Total, Line Item Total, and Estimated Amount. The 'View Order' and 'Copy Order' links are visible for each row.

Figure 16: Orders, Order History, View Order

If you wish to view one of the recent orders:

1. Click the [View Order](#) option. This will take you to the Order History Details



logged in as: mymanager
my profile | faq | logout

customer: 135 [TEST ORDER ACCOUNT] Go

ORDERS ORDER GUIDE INVOICES ADMIN

Order History Details

| | | | | |
|----------------------|-----------------------|----------------------------|-----------------------------------|--------------------------------|
| PO Number: 0 | Order Date: 8/31/2016 | Total Line Items: 6 | Total Order Quantity: 49 | Estimated Amount: \$2,577.25 |
| Customer Number: 135 | TEST ORDER ACCOUNT | Verification Number: 61883 | Total Cube: 67.51 ft ³ | Total Ship Weight: 1302.95 lbs |

| Line | Item Number | Category | Description | Item Pack | Quantity |
|------|-------------|--------------|--------------------------------|-----------|----------|
| 1 | 93443 | BEVERAGES | COFFEE REGULAR | 116/2.5Z | 5 |
| 2 | 93450 | BEVERAGES | COFFEE DECAF | 96/2.125 | 4 |
| 3 | 94385 | FROZEN GOODS | BEEF PATTY ANGUS 3.95 OZ | 1/75 CT | 10 |
| 4 | 99066 | FROZEN GOODS | ALL NATURAL CHAR CHICKEN FILET | 8/4.78 | 10 |
| 5 | 59291 | FROZEN GOODS | FRY CRISS CUT SEASONED 6/5 LB | 6/5# | 10 |
| 6 | 55553 | FROZEN GOODS | ONION RINGS | 4/5LB | 10 |

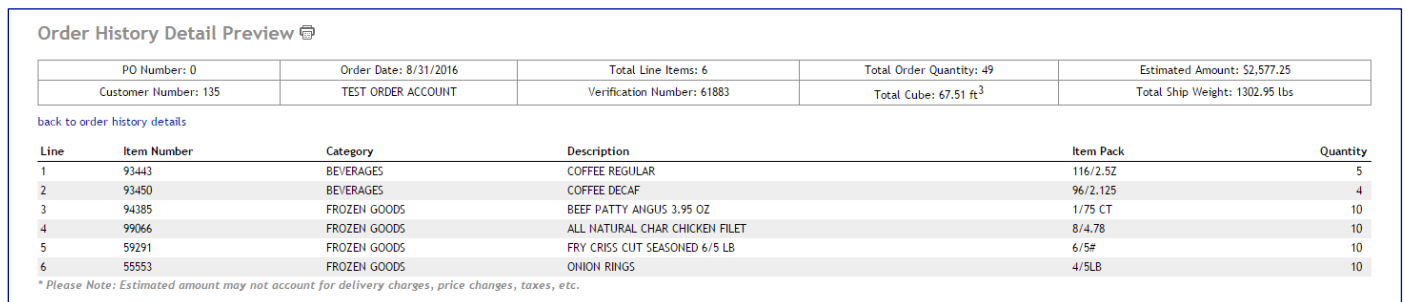
* Please Note: Estimated amount may not account for delivery charges, price changes, taxes, etc.

[Back to Home](#)

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Figure 17: Orders, Order History, Order History Details

1. To Print the Order History Detail click the  button.



Order History Detail Preview



| | | | | |
|----------------------|-----------------------|----------------------------|-----------------------------------|--------------------------------|
| PO Number: 0 | Order Date: 8/31/2016 | Total Line Items: 6 | Total Order Quantity: 49 | Estimated Amount: \$2,577.25 |
| Customer Number: 135 | TEST ORDER ACCOUNT | Verification Number: 61883 | Total Cube: 67.51 ft ³ | Total Ship Weight: 1302.95 lbs |

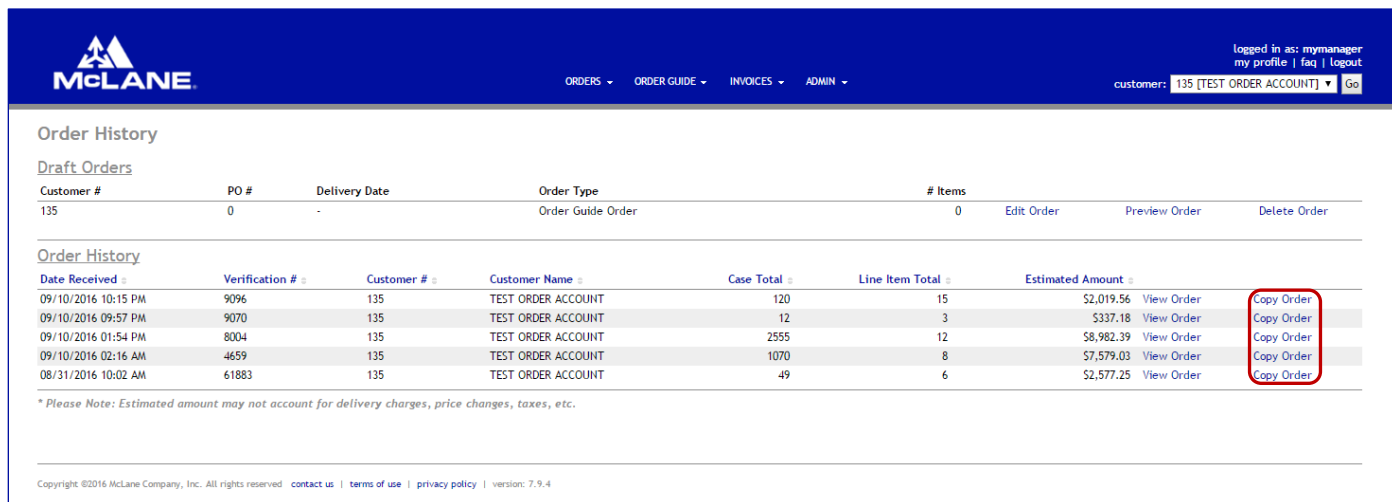
[back to order history details](#)

| Line | Item Number | Category | Description | Item Pack | Quantity |
|------|-------------|--------------|--------------------------------|-----------|----------|
| 1 | 93443 | BEVERAGES | COFFEE REGULAR | 116/2.5Z | 5 |
| 2 | 93450 | BEVERAGES | COFFEE DECAF | 96/2.125 | 4 |
| 3 | 94385 | FROZEN GOODS | BEEF PATTY ANGUS 3.95 OZ | 1/75 CT | 10 |
| 4 | 99066 | FROZEN GOODS | ALL NATURAL CHAR CHICKEN FILET | 8/4.78 | 10 |
| 5 | 59291 | FROZEN GOODS | FRY CRISS CUT SEASONED 6/5 LB | 6/5# | 10 |
| 6 | 55553 | FROZEN GOODS | ONION RINGS | 4/5LB | 10 |

* Please Note: Estimated amount may not account for delivery charges, price changes, taxes, etc.

Figure 18: Orders, Order History, Order History Details, Print

2. To Export the Order History Detail to a Delimited Text File click the  button and respond to the Save Export Confirmation.
3. To Export the Order History Detail to an Excel Spreadsheet click the  button and respond to the Save Export Confirmation.



McLANE logo and navigation menu (ORDERS, ORDER GUIDE, INVOICES, ADMIN) are visible at the top. The user is logged in as 'mymanager'.

Order History

| Customer # | PO # | Delivery Date | Order Type | # Items | Edit Order | Preview Order | Delete Order |
|------------|------|---------------|-------------------|---------|------------|---------------|--------------|
| 135 | 0 | - | Order Guide Order | 0 | | | |

Draft Orders

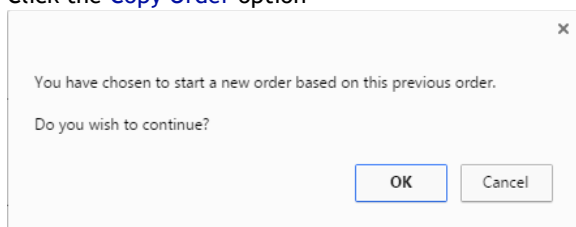
| Date Received | Verification # | Customer # | Customer Name | Case Total | Line Item Total | Estimated Amount | View Order | Copy Order |
|---------------------|----------------|------------|--------------------|------------|-----------------|------------------|------------|------------|
| 09/10/2016 10:15 PM | 9096 | 135 | TEST ORDER ACCOUNT | 120 | 15 | \$2,019.56 | View Order | Copy Order |
| 09/10/2016 09:57 PM | 9070 | 135 | TEST ORDER ACCOUNT | 12 | 3 | \$337.18 | View Order | Copy Order |
| 09/10/2016 01:54 PM | 8004 | 135 | TEST ORDER ACCOUNT | 2555 | 12 | \$8,982.39 | View Order | Copy Order |
| 09/10/2016 02:16 AM | 4659 | 135 | TEST ORDER ACCOUNT | 1070 | 8 | \$7,579.03 | View Order | Copy Order |
| 08/31/2016 10:02 AM | 61883 | 135 | TEST ORDER ACCOUNT | 49 | 6 | \$2,577.25 | View Order | Copy Order |

* Please Note: Estimated amount may not account for delivery charges, price changes, taxes, etc.

Figure 19: Orders, Order History, Copy Order

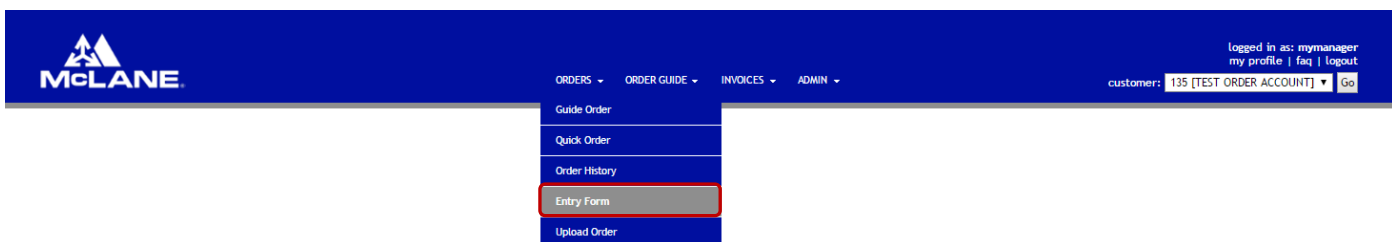
If you wish to use one of the recent orders as a beginning for a new order:

1. Click the **Copy Order** option



2. If you wish to confirm the Copy process click **OK** button. This will save the copied order as a new Draft Order that will then be available to edit or modify as needed.
3. If you wish to cancel the Copy process click **Cancel** button.

3.4. Entry Form



McLANE logo and navigation menu (ORDERS, ORDER GUIDE, INVOICES, ADMIN) are visible at the top. The user is logged in as 'mymanager'.


The 'Entry Form' option is highlighted in the navigation menu.


The Order Entry Form is a printable document where the user can select either the Default or Custom Order Guide. If the user selects the Default Order Guide then the default Categories are displayed. If the user selects the Custom Order Guide then the user-defined categories are displayed and they are displayed in the order identified by the user that created then. The user also has the option of selecting a Build-To List to apply to the selected Order Guide. This will change the format to display the Par Values and the On-Hand entry boxes.

3.4.1. Printing an Order Entry Form - Default Order Guide ...

3.4.1.1. To Print an Order Entry Form without a Build-To List:

1. Click Orders

2. Click Entry Form
3. Click the  button.

Order Entry Form - Default Order Guide [Switch to Custom](#) 


Build-To List: -None- back to home page

McLane Customer Number: 135 Customer Name: TEST ORDER ACCT

| Category | Item Number | Item Description | Pack | On-Hand | On-Hand | On-Hand | On-Hand | On-Hand |
|-----------|-------------|-------------------------------|----------|----------------------|----------------------|----------------------|----------------------|----------------------|
| BEVERAGES | 93450 | COFFEE DECAF | 96/2.125 | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |
| BEVERAGES | 93443 | COFFEE REGULAR | 116/2.5Z | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |
| BEVERAGES | 61773 | SYRUP SHAKE CHOCOLATE 4/1 GAL | 4/1GAL | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |
| BEVERAGES | 61775 | SYRUP STRAWBERRY SHAKE | 4/1GAL | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |
| BEVERAGES | 61774 | SYRUP, VANILLA SHAKE | 4/1GAL | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |

Figure 20: Order Entry Form - Default Order Guide, with no Build-To List

3.4.1.2. To Print an Order Entry Form with a Build-To List:

1. Click Orders
2. Click Entry Form
3. Click the  button
4. Select a Build-To List.

Build-To List: Multiple Customer Submit Test Corporate Built To (Web Service Submitted) ▼

-None-


Multiple Customer Submit Test Corporate Built To (Web Service Submitted)

Sample 1

Sample 2

Sample 3

Sample 4 (default)

Order Entry Form - Default Order Guide [Switch to Custom](#) 

Build-To List: Multiple Customer Submit Test Corporate Built To (Web Service Submitted) ▼ back to home page

McLane Customer Number: 135 Customer Name: TEST ORDER ACCT

Multiple Customer Submit Test Corporate Built To (Web Service Submitted)


| Category | Item Number | Item Description | Pack | Par | On-Hand | On-Hand | On-Hand | On-Hand | On-Hand |
|-----------|-------------|-------------------------------|----------|------|----------------------|----------------------|----------------------|----------------------|----------------------|
| BEVERAGES | 93450 | COFFEE DECAF | 96/2.125 | 2.00 | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |
| BEVERAGES | 93443 | COFFEE REGULAR | 116/2.5Z | 2.00 | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |
| BEVERAGES | 61773 | SYRUP SHAKE CHOCOLATE 4/1 GAL | 4/1GAL | 1.00 | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |
| BEVERAGES | 61775 | SYRUP STRAWBERRY SHAKE | 4/1GAL | 3.00 | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |
| BEVERAGES | 61774 | SYRUP, VANILLA SHAKE | 4/1GAL | 3.00 | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |


Figure 21: Order Entry Form - Default Order Guide, Build-To List

5. Click the  button.

3.4.2. Printing an Order Entry Form - Custom Order Guide ...

3.4.2.1. To Print a Custom Order Guide Entry Form:

1. Click Orders
2. Click Entry Form
3. Click [Switch to Custom](#)
4. Click the  button.

Order Entry Form - Custom Order Guide [Switch to Default](#) 

Build-To List: -None- back to home page

McLane Customer Number: 135 Customer Name: TEST ORDER ACCT

| Category | Item Number | Item Description | Pack | On-Hand | On-Hand | On-Hand | On-Hand | On-Hand |
|----------------|-------------|--------------------------------|---------|----------------------|----------------------|----------------------|----------------------|----------------------|
| Administrative | 1000 | BUILD TO ORDER GUIDE | EACH | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |
| Administrative | 999017 | FUEL SURCHARGE | 0 | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |
| Freezer, 1 | 59278 | ALL WHITE CHICKEN STARS | 4/6LB | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |
| Freezer, 1 | 59292 | BUH HONEY WHEAT OAT 4" 5/30 EA | 5/30 EA | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |
| Freezer, 1 | 59291 | FRY CRISS CUT SEASONED 6/5 LB | 6/5# | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |


Figure 22: Order Entry Form - Custom Order Guide, no Build-To List

3.4.2.2. To Print a Custom Order Guide Entry Form with a Build-To List:

1. Click Orders
2. Click Entry Form
3. Click [Switch to Custom](#)
4. Select a Build-To List.

Build-To List ▼

- None-
- Multiple Customer Submit Test Corporate Built To (Web Service Submitted)
- Sample 1
- Sample 2
- Sample 3
- Sample 4 (default)

Order Entry Form - Custom Order Guide Switch to Default 

Build-To List ▼

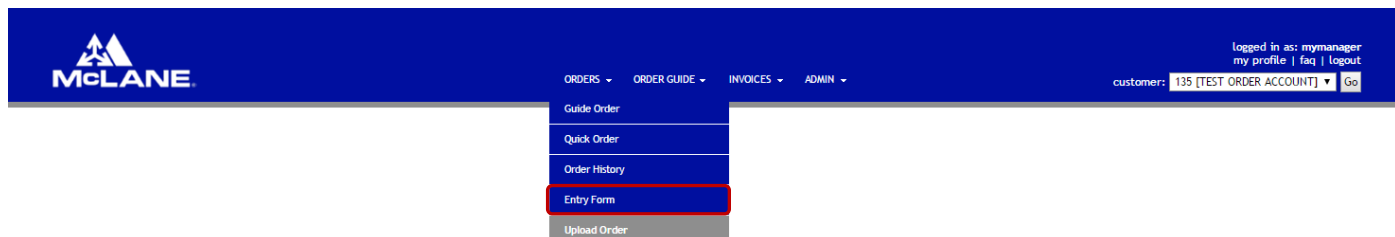
[back to home page](#)

| McLane Customer Number: 135 | | Customer Name: TEST ORDER ACCT | | Multiple Customer Submit Test Corporate Built To (Web Service Submitted) | | | | | | |
|-----------------------------|-------------|--------------------------------|------|--|----------------------|----------------------|----------------------|----------------------|----------------------|--|
| Category | Item Number | Item Description | Pack | Par | On-Hand | On-Hand | On-Hand | On-Hand | On-Hand | |
| Administrative | 1000 | BUILD TO ORDER GUIDE | EACH | 0 | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | |
| Administrative | 69985 | CP CHART ALT OPTIONS MENU EA | 1 CT | 0 | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | |
| Administrative | 69987 | CP JOB AID DINING ROOM | 1 CT | 0 | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | |
| Administrative | 69625 | KIT CLEANING CHARBROILER EA | 1 CT | 5.00 | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | |
| Administrative | 71300 | CP DVD - ORIENTATION | 1 CT | 0 | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | |

Figure 23: Order Entry Form - Custom Order Guide, Build-To List

5. Click the  button.

3.5. Upload Order



The Upload Order functionality allows the user to browse for, select, and upload a local file that contains a pre-populated order. The file must be a .CSV formatted file that contains 2 (two) columns:

1. Item Number (number)
2. Item Quantity (number)

Once the file is selected and uploaded the process will validate all of the Items Numbers and Quantities against the customers' Order Guide and ensure that the customer is authorized to purchase the items. All of the valid items will be saved as a new Draft Order and the user will be notified of any invalid or unauthorized items identified in the uploaded file.

3.5.1. Uploading a New Draft Order

1. Click Orders
2. Click Upload Order

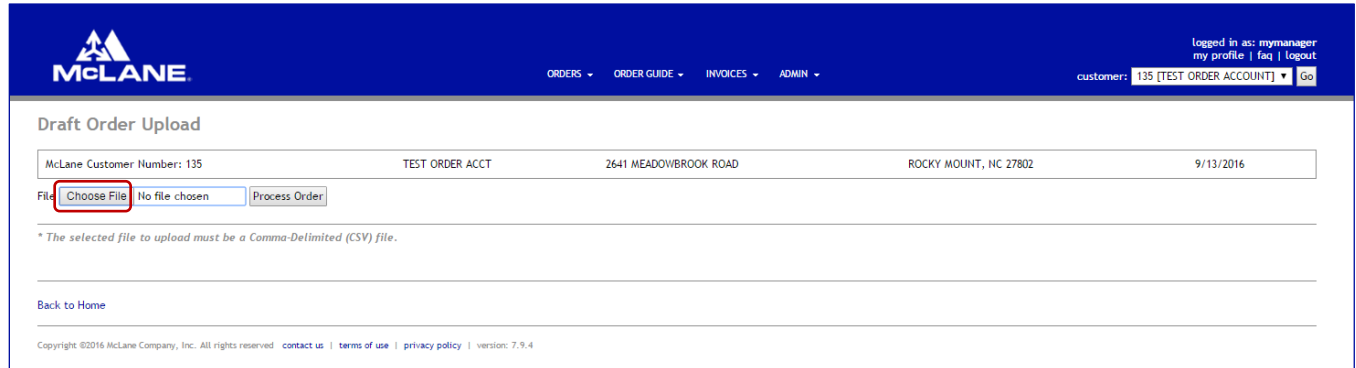


Figure 24: Upload Order

- Click the **Choose File** **No file chosen** button.
The Browse File dialog box will open and allow for the user to select the file for uploading.

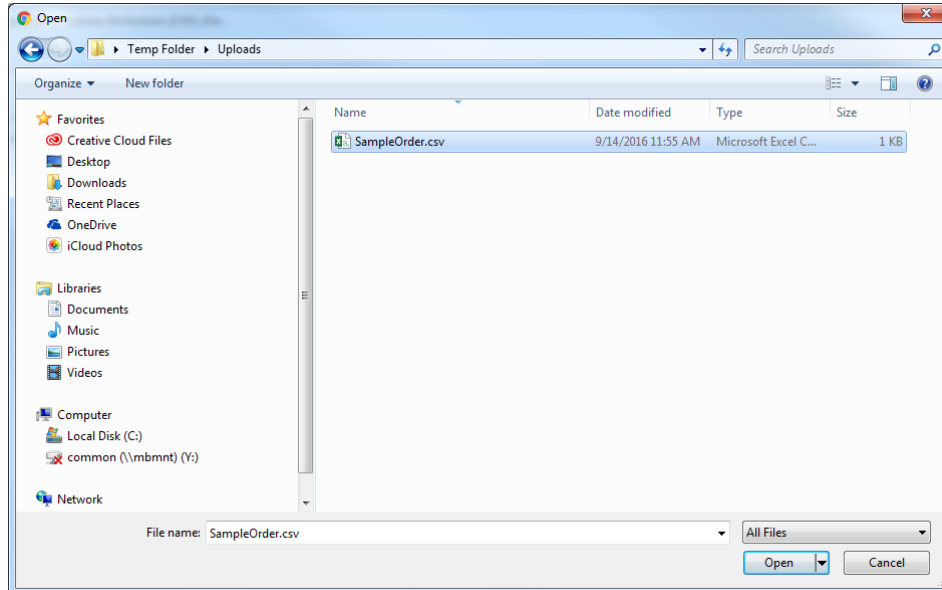


Figure 25: Upload Order, Browse and Select File.

- Select the Order file (*.CSV)
File **Choose File** **SampleOrder.csv** **Process Order**
- Click the **Process Order**
All invalid or unauthorized items contained in the order file will be displayed to the user.
 - ⚠ Line 8: Item #61650 is not a numeric value.
 - ⚠ Line 12: Item #t1399 is not a numeric value.

The user will receive the Draft Order Saved Confirmation.

✔ **Order Draft successfully saved.**

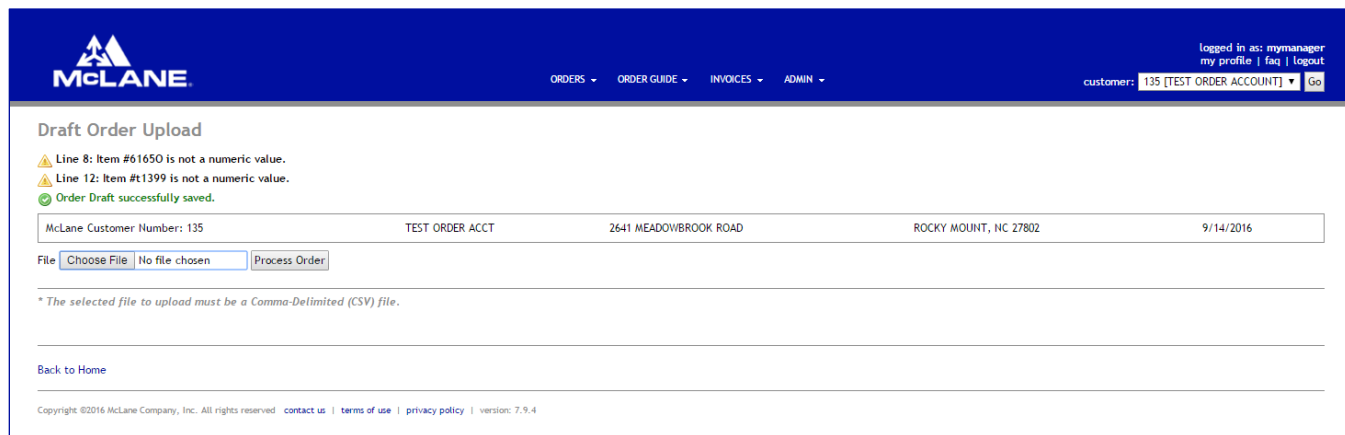
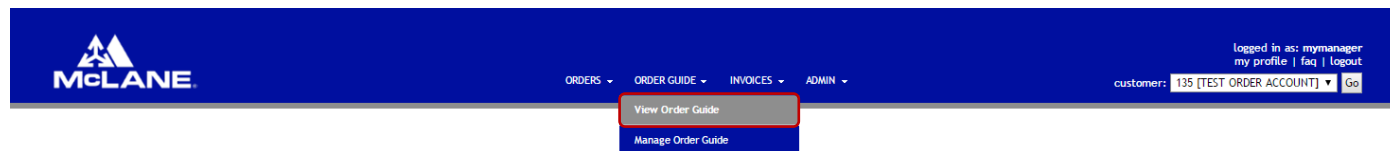


Figure 26: Upload Order, Process Confirmation

Note: The Order file selected to upload and save into eServ must be a Comma-Delimited (.CSV) Text File and must contain only 2 columns ... the Item Number and the associated Order Quantity, with no headers.

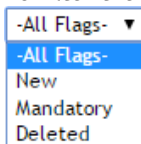
4. Order Guide Menu Options

4.1. View Order Guide

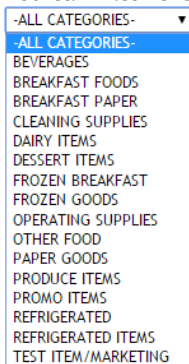


4.1.1. Viewing a Default Order Guide

1. Click Order Guide
2. Click View Order Guide
3. To filter the items viewed you can select a specific flag for items



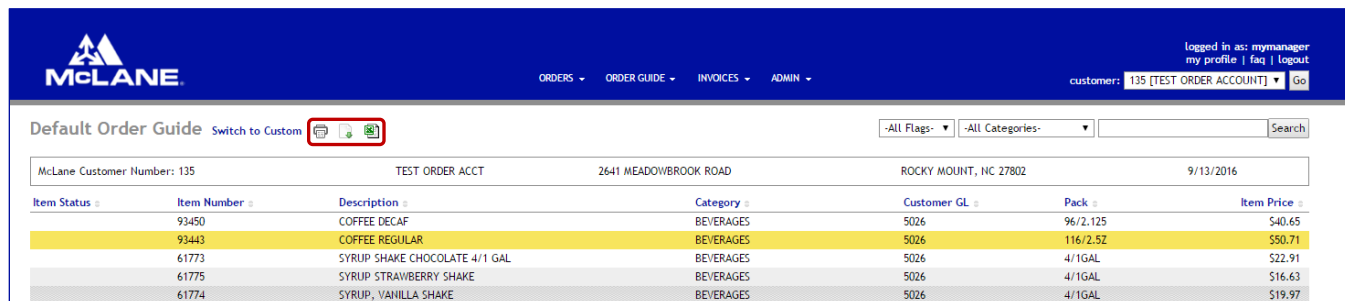
4. You can filter the items that are displayed by selecting one of the categories from the dropdown list.



5. If you wish to search for a specific item you can enter specific search criteria in the Search box then click the Search button.

-All Flags- ▾ -All Categories- ▾ Search

-All Flags-
 -All Flags-
 New
 Mandatory
 Deleted






Default Order Guide Switch to Custom Print Export Excel

logged in as: mymanager
my profile | faq | logout
customer: 135 [TEST ORDER ACCOUNT] Go

McLane Customer Number: 135 TEST ORDER ACCT 2641 MEADOWBROOK ROAD ROCKY MOUNT, NC 27802 9/13/2016

| Item Status | Item Number | Description | Category | Customer GL | Pack | Item Price |
|-------------|-------------|-------------------------------|-----------|-------------|----------|------------|
| | 93450 | COFFEE DECAF | BEVERAGES | 5026 | 96/2.125 | \$40.65 |
| | 93443 | COFFEE REGULAR | BEVERAGES | 5026 | 116/2.5Z | \$50.71 |
| | 61773 | SYRUP SHAKE CHOCOLATE 4/1 GAL | BEVERAGES | 5026 | 4/1GAL | \$22.91 |
| | 61775 | SYRUP STRAWBERRY SHAKE | BEVERAGES | 5026 | 4/1GAL | \$16.63 |
| | 61774 | SYRUP, VANILLA SHAKE | BEVERAGES | 5026 | 4/1GAL | \$19.97 |

Figure 27: Viewing a Default Order Guide

6. To Print the Default Order Guide click the  button.
7. To Export the Order History Detail to a Delimited Text File click the  button and respond to the Save Export Confirmation.
8. To Export the Order History Detail to an Excel Spreadsheet click the  button and respond to the Save Export Confirmation.

4.1.2. Viewing a Custom Order Guide

1. Click Order Guide
2. Click View Order Guide
3. Click [Switch to Custom](#)
4. To limit the items viewed you can select a specific flag for items

-All Flags- ▾
 -All Flags-
 New
 Mandatory
 Deleted

5. If you wish to search for a specific item then you can select a specific custom category and-or enter specific search criteria.

-All Flags- ▾ -All Categories- ▾ Search

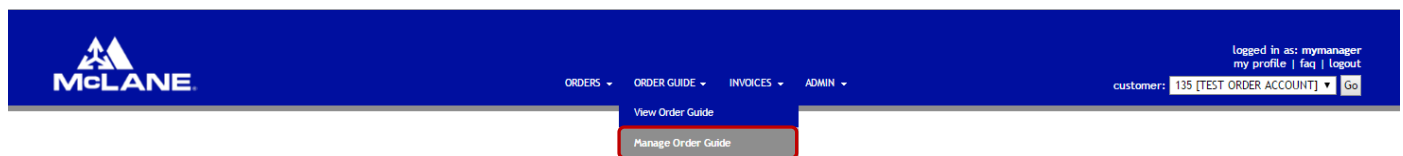
-All Categories-
 Administrative
 Cooler, 1
 Cooler, 2
 Drinks
 Drygoods, Internal
 Drygoods, External
 Freezer, 1
 Freezer, 2
 Maintenance
 Smallwares, External
 Unassigned
 Excluded

| Item Status | Item Number | Description | Category | Customer GL | Pack | Item Price |
|-------------|-------------|--------------------------------|----------------|-------------|---------|------------|
| | 1000 | BUILD TO ORDER GUIDE | Administrative | 5056 | EACH | \$0.00 |
| | 999017 | FUEL SURCHARGE | Administrative | 5056 | 0 | \$0.00 |
| | 59278 | ALL WHITE CHICKEN STARS | Freezer, 1 | 5001 | 4/6LB | \$33.04 |
| | 59292 | BUN HONEY WHEAT OAT 4" 5/30 EA | Freezer, 1 | 5001 | 5/30 EA | \$16.67 |
| | 59291 | FRY CRISS CUT SEASONED 6/5 LB | Freezer, 1 | 5001 | 6/5# | \$19.79 |

Figure 28: Viewing a Custom Order Guide

- To Print the Custom Order Guide click the button.
- To Export the Order History Detail to a Delimited Text File click the button and respond to the Save Export Confirmation.
- To Export the Order History Detail to an Excel Spreadsheet click the button and respond to the Save Export Confirmation.

4.2. Managing your Custom Order Guide



- Click Order Guide
- Click Manage Order Guide

Manage Order Guide

Order Guide

- View Default Order Guide
- View Custom Order Guide
- Customize Order Guide

Build-To (PAR) Lists

- Sample 1
- Sample 2
- Sample 3
- Multiple Customer Submit Test Corporate Build To (Web Service Submitted)

Create New Build-To List

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Figure 29: Order Guide, Manage Custom Order Guide

4.2.1. Viewing a Default Order Guide

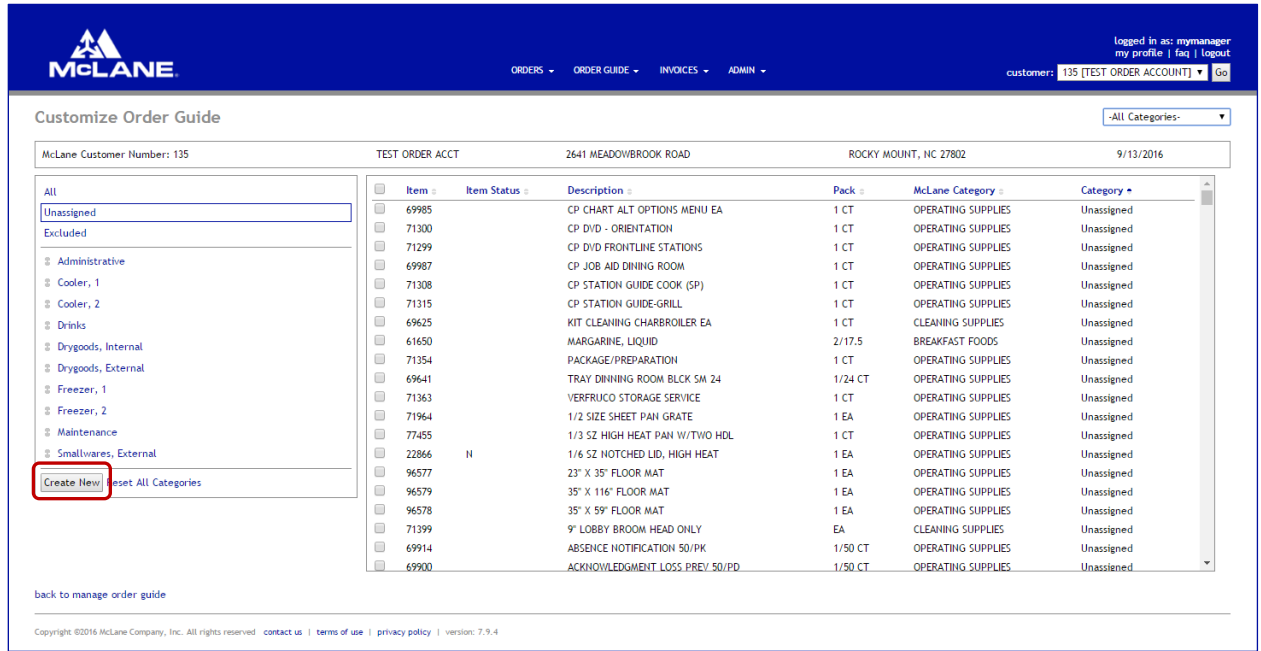
- [View Default Order Guide](#)

4.2.2. Viewing a Custom Order Guide

- [View Custom Order Guide](#)

4.2.3. Customizing Your Order Guide

4.2.3.1. Create Custom Categories



McLANE
ORDERS ORDER GUIDE INVOICES ADMIN
logged in as: mymanager
my profile | faq | logout
customer: 135 [TEST ORDER ACCOUNT] Go

Customize Order Guide -All Categories-

McLANE Customer Number: 135 TEST ORDER ACCT 2641 MEADOWBROOK ROAD ROCKY MOUNT, NC 27802 9/13/2016

| Item | Item Status | Description | Pack | McLane Category | Category |
|-------|-------------|--------------------------------|---------|--------------------|------------|
| 69985 | | CP CHART ALT OPTIONS MENU EA | 1 CT | OPERATING SUPPLIES | Unassigned |
| 71300 | | CP D/V D - ORIENTATION | 1 CT | OPERATING SUPPLIES | Unassigned |
| 71299 | | CP D/V D FRONTLINE STATIONS | 1 CT | OPERATING SUPPLIES | Unassigned |
| 69987 | | CP JOB AID DINING ROOM | 1 CT | OPERATING SUPPLIES | Unassigned |
| 71308 | | CP STATION GUIDE COOK (SP) | 1 CT | OPERATING SUPPLIES | Unassigned |
| 71315 | | CP STATION GUIDE-GRILL | 1 CT | OPERATING SUPPLIES | Unassigned |
| 69625 | | KIT CLEANING CHARBROILER EA | 1 CT | CLEANING SUPPLIES | Unassigned |
| 61650 | | MARGARINE, LIQUID | 2/17.5 | BREAKFAST FOODS | Unassigned |
| 71354 | | PACKAGE/PREPARATION | 1 CT | OPERATING SUPPLIES | Unassigned |
| 69641 | | TRAY DINING ROOM BLCK SM 24 | 1/24 CT | OPERATING SUPPLIES | Unassigned |
| 71363 | | VERFRUCO STORAGE SERVICE | 1 CT | OPERATING SUPPLIES | Unassigned |
| 71964 | | 1/2 SIZE SHEET PAN GRATE | 1 EA | OPERATING SUPPLIES | Unassigned |
| 77455 | | 1/3 SZ HIGH HEAT PAN W/TWO HDL | 1 CT | OPERATING SUPPLIES | Unassigned |
| 22866 | N | 1/6 SZ NOTCHED LID, HIGH HEAT | 1 EA | OPERATING SUPPLIES | Unassigned |
| 96577 | | 23" X 35" FLOOR MAT | 1 EA | OPERATING SUPPLIES | Unassigned |
| 96579 | | 35" X 116" FLOOR MAT | 1 EA | OPERATING SUPPLIES | Unassigned |
| 96578 | | 35" X 59" FLOOR MAT | 1 EA | OPERATING SUPPLIES | Unassigned |
| 71399 | | 9" LOBBY BROOM HEAD ONLY | EA | CLEANING SUPPLIES | Unassigned |
| 69914 | | ABSENCE NOTIFICATION 50/PK | 1/50 CT | OPERATING SUPPLIES | Unassigned |
| 69900 | | ACKNOWLEDGMENT LOSS PREV 50/PD | 1/50 CT | OPERATING SUPPLIES | Unassigned |

back to manage order guide
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Figure 30: Create New Custom Category

1. Click Order Guide
2. Click Manage Order Guide
3. Click Customize Order Guide
4. Click the **Create New** button.
5. Enter a name for the Custom Category.

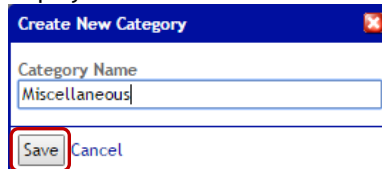


Create New Category

Category Name

Save Cancel

6. Click the **Save** to save your Custom Category. Upon successful save a success confirmation message is displayed.




Create New Category

Category Name
Miscellaneous

Save Cancel

7. If you wish to cancel the Save processes then click the **Cancel** option.
8. Repeat steps 1 through 7 for each category you wish to create.

4.2.3.2. Reorder your Custom Categories

1. Select the  icon next to a Custom Category and drag it up or down to reorder your Custom Categories. The order of the categories here is the same order categories are displayed on order forms and order guides.

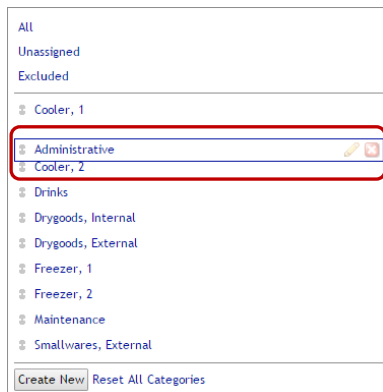


Figure 31: Reorder Custom Category

4.2.3.3. Add Items to your Custom Categories

1. From the list of Items on the right, select the checkbox that corresponds to the **Item** that you are selecting. You may select as many **Items** as you wish
2. Drag the selected **Item** or **Items** and drop them onto your Custom Category on the left.

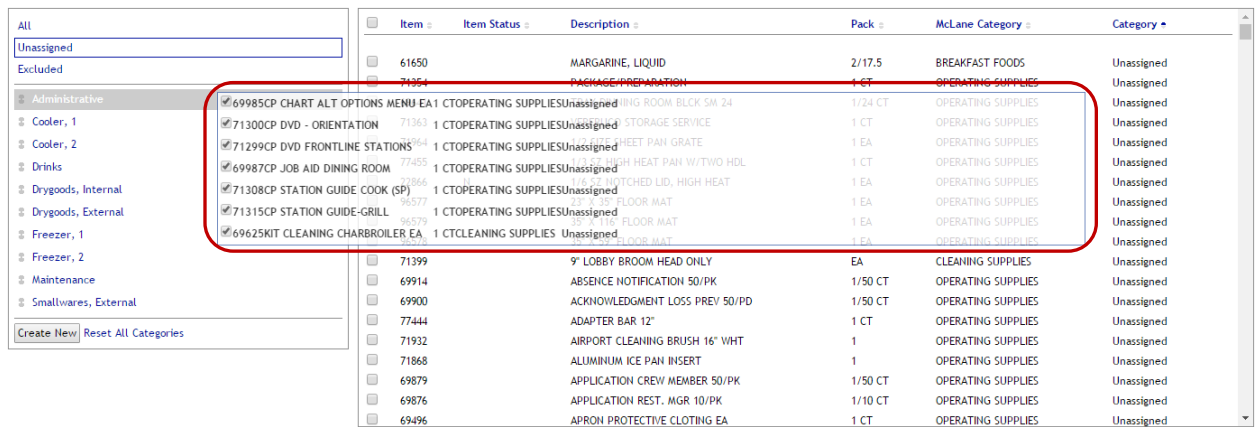


Figure 32: Add items to Custom Category

4.2.3.4. Reorder the Items in your Custom Categories

1. To view the Items that have been assigned to any Custom Category, click the Category.

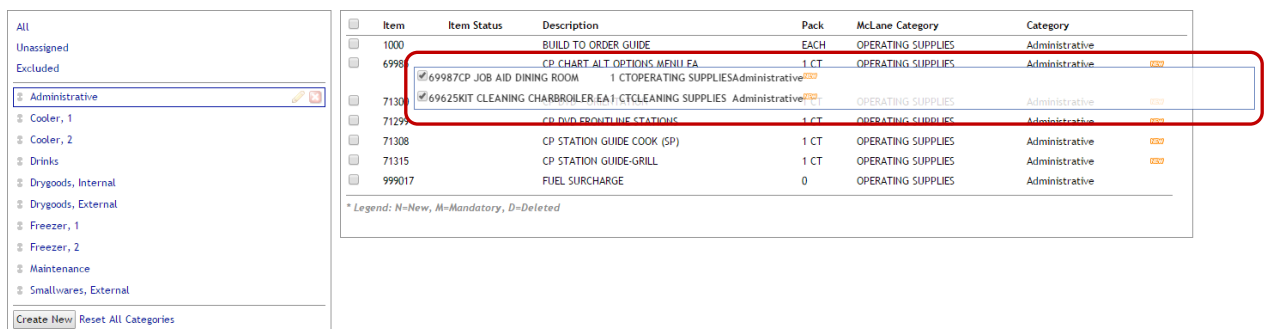


Figure 33: Reorder Items in a Custom Category

2. Select the **Item(s)** that you wish to reorder by placing the mouse on the top of the item and hold the left mouse button

3. Drag the selected **Item(s)** up or down and release the left mouse button. Use the scroll button on the mouse to move the item to a location not immediately displayed in the item listing.

4.2.4. Build-To (PAR) Lists

4.2.4.1. Creating a New Build-To List for Default Categories

1. Click Order Guide
2. Click Manage Order Guide
3. Click **Create New Build-To List** option
4. Enter a name for your new Build-To List and click the **Create** button.
5. If this new Build-To List will be the default used when placing Orders then select the checkbox **Default Build-To?**
6. If you wish to copy PAR values from an existing Build-To List the select the name of the Build-To List from those available in the dropdown.
Copy Par Values From

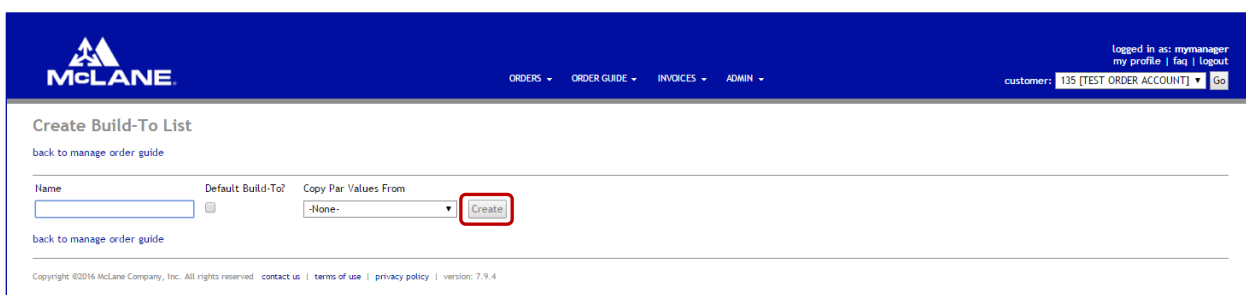


Figure 34: Create new Build-To List

7. Enter a PAR value for each Item within your new Build-To List.

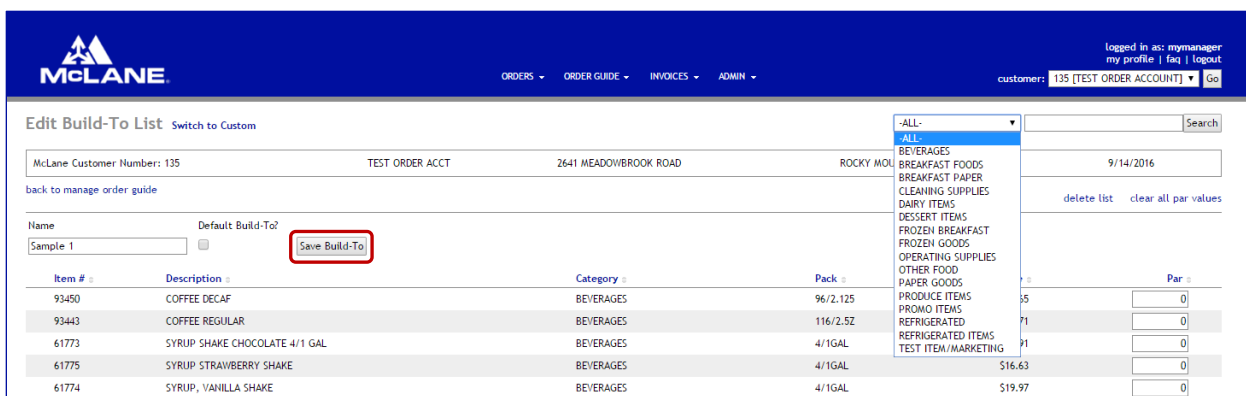
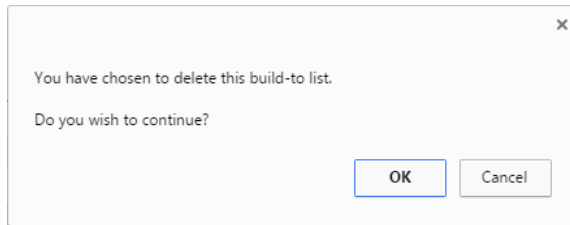
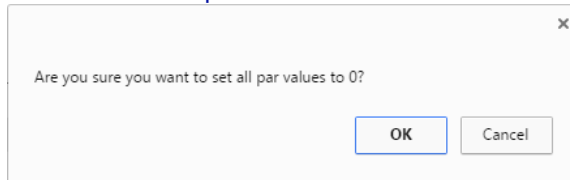


Figure 35: Complete/Edit Default Build-To List

8. Click the **Save Build-To** button to save your PAR values.
9. Click the **delete list** option to completely delete the current Build-To List



- Click the [clear all par values](#) to remove the PAR values for all Items in the current Build-To List



- Click the [back to manage order guide](#) option to return to the Manage Order Guide page.

4.2.4.2. Creating a New Build-To List for Custom Categories

- Click Order Guide
- Click Manage Order Guide
- Click [Create New Build-To List](#) option
- Enter a name for your new Build-To List and click the [Create](#) button.
- If this new Build-To List will be the default used when placing Orders then select the checkbox [Default Build-To?](#)

- If you wish to copy PAR values from an existing Build-To List the select the name of the Build-To List from those available in the dropdown.
[Copy Par Values From](#)

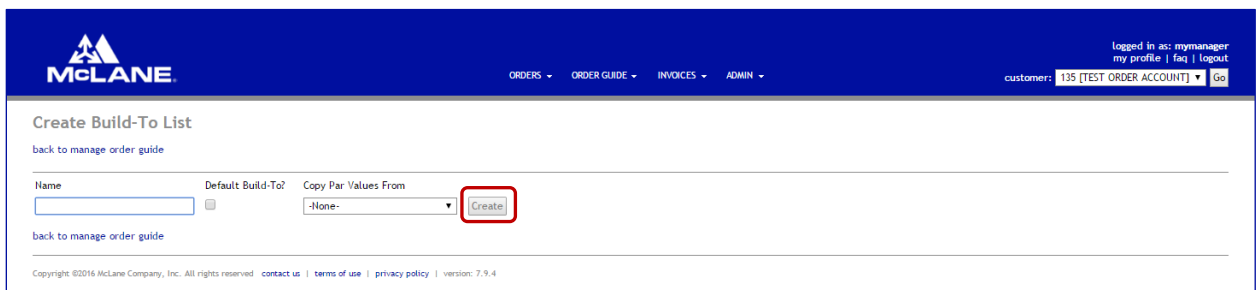


Figure 36: Create new Build-To List

- Click on the [Show Custom Categories](#) option
- Enter a PAR value for each Item within your new Build-To List.

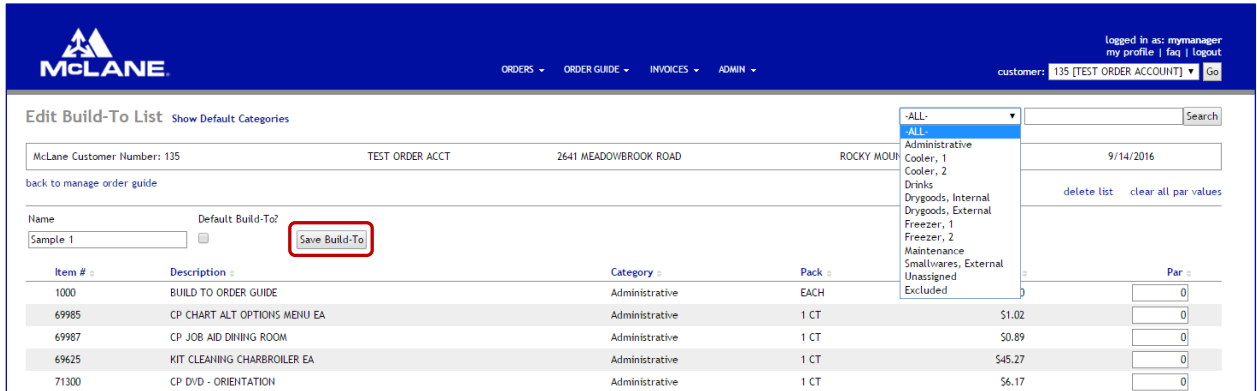
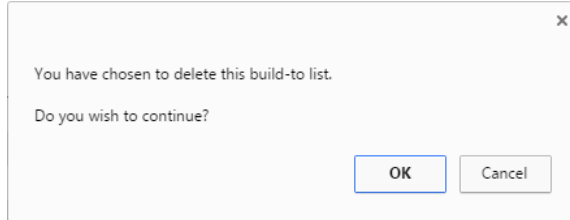
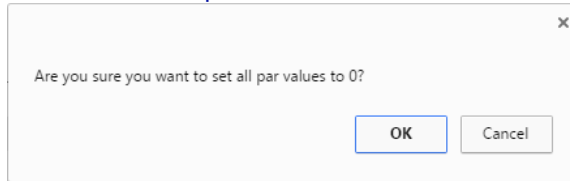


Figure 37: Complete/Edit Custom Build-To List

9. Click the **Save Build-To** button to save your PAR values.
10. Click the **delete list** option to completely delete the current Build-To List



11. Click the **clear all par values** to remove the PAR values for all Items in the current Build-To List



12. Click the **back to manage order guide** option to return to the Manage Order Guide page.

4.2.4.3. Edit an Existing Build-To List

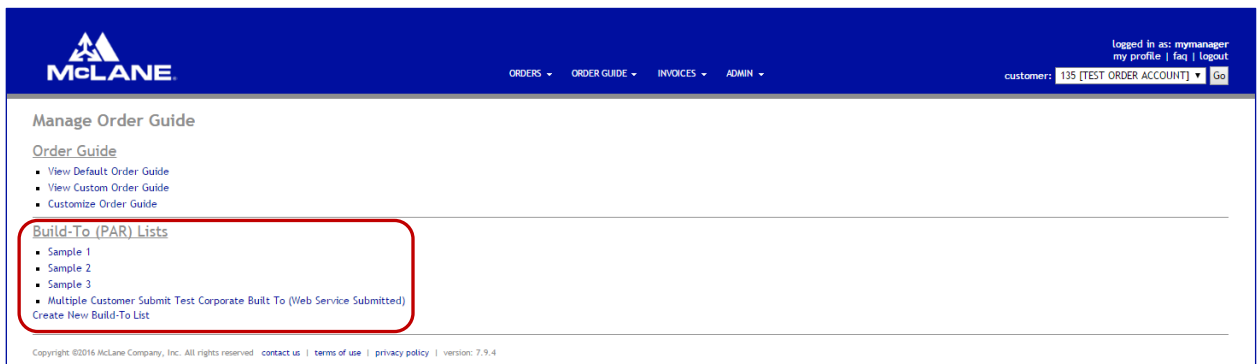
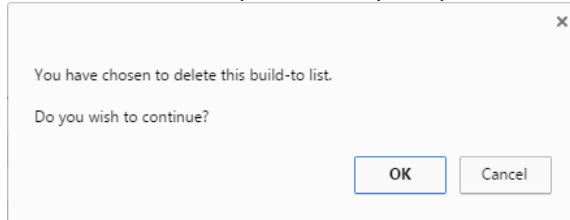


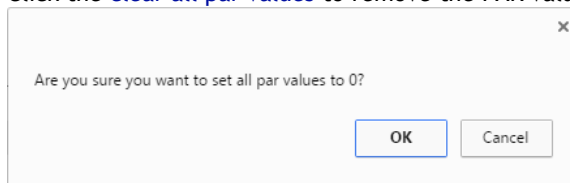
Figure 38: Edit Existing Custom Order Guide

1. Select the Build-To List from those available on the Manage Order Guide page.
2. To modify the Build-To List name, change the name and click the **Save Build-To** button.

- Update the PAR value for the selected Item(s) and then click the **Save Build-To** button to save your changes.
- Click the **delete list** option to completely delete the current Build-To List



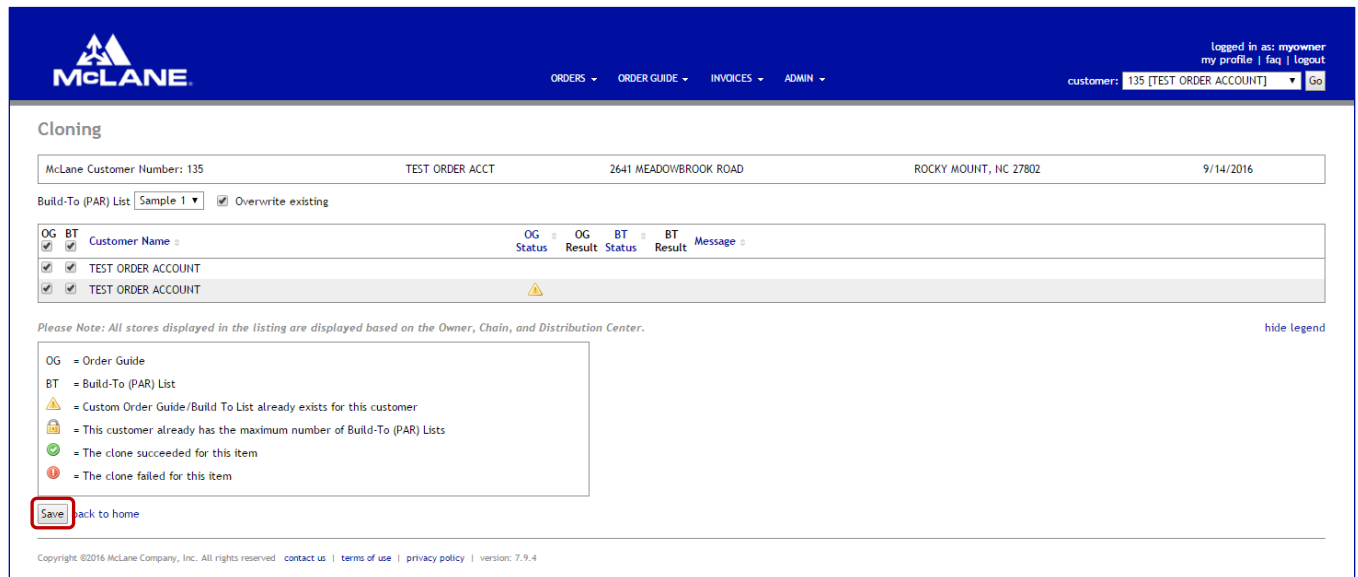
- Click the **clear all par values** to remove the PAR values for all Items in the current Build-To List



- Click the **back to manage order guide** option to return to the Manage Order Guide page.

4.2.5. Cloning Your Custom Order Guide and-or Build-To List

The Cloning Functionality allows an Owner to copy a specific store's Custom Order Guide and-or a non-web service submitted Build-To List to one or more stores that have the same Owner, Chain, and Distribution Center as the current store.



The screenshot shows the McLane Cloning interface. At the top, there is a navigation bar with the McLane logo and menu items: ORDERS, ORDER GUIDE, INVOICES, ADMIN. The user is logged in as 'myowner'. The current customer is '135 [TEST ORDER ACCOUNT]'. The main content area is titled 'Cloning' and displays the following information:

- McLane Customer Number: 135
- TEST ORDER ACCT
- 2641 MEADOWBROOK ROAD
- ROCKY MOUNT, NC 27802
- 9/14/2016

Below this, there is a 'Build-To (PAR) List' dropdown set to 'Sample 1' and a checkbox for 'Overwrite existing'. A table lists items to be cloned:

| OG | BT | Customer Name | OG Status | OG Result | BT Status | BT Result | Message |
|-------------------------------------|-------------------------------------|--------------------|-----------|-----------|-----------|-----------|---------|
| <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | TEST ORDER ACCOUNT | | | | | |
| <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | TEST ORDER ACCOUNT | | | | | |

A 'Please Note' section states: 'All stores displayed in the listing are displayed based on the Owner, Chain, and Distribution Center.' A 'hide legend' link is also present. A legend box contains the following information:

- OG = Order Guide
- BT = Build-To (PAR) List
- ⚠ = Custom Order Guide/Build To List already exists for this customer
- 🚫 = This customer already has the maximum number of Build-To (PAR) Lists
- ✅ = The clone succeeded for this item
- ❌ = The clone failed for this item

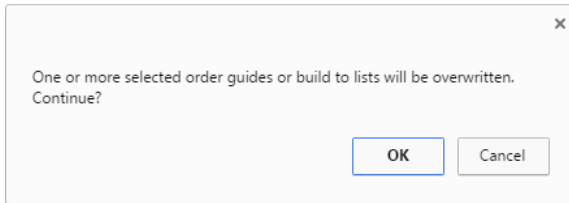
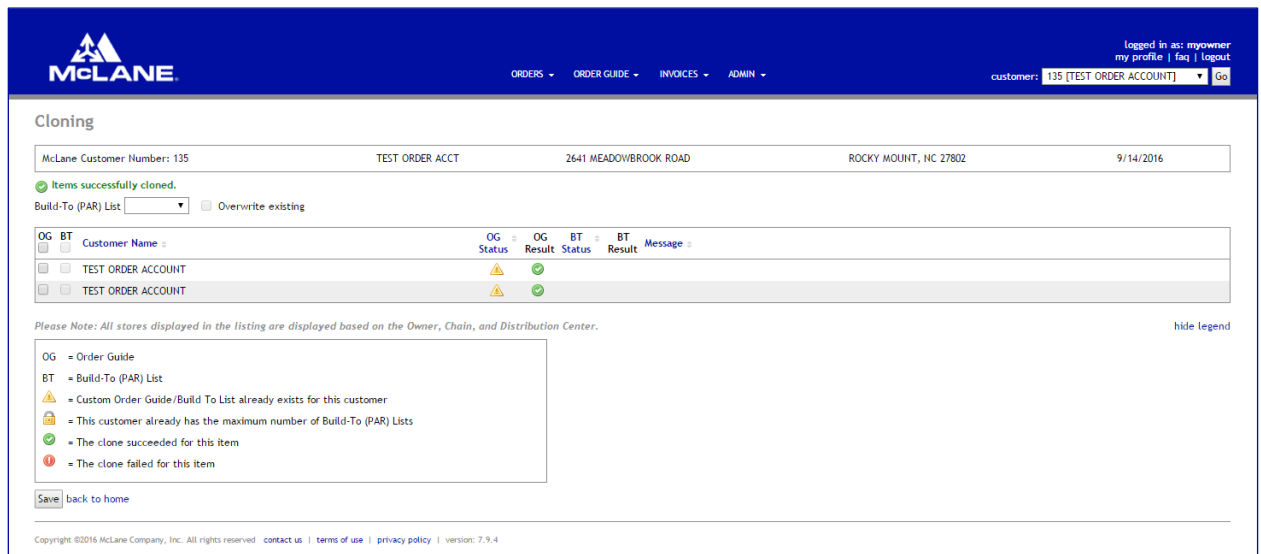
A 'Save' button is highlighted in a red box, with a 'back to home' link next to it. The footer contains copyright information: 'Copyright ©2016 McLane Company, Inc. All rights reserved. contact us | terms of use | privacy policy | version: 7.9.4'.

Figure 39: Cloning Functionality, No Legend

- Click Order Guide > Manage Order Guide menu option
- Click on the **Clone Custom Order Guide and Build-To (PAR) List** option. This option will only be available if the currently selected and verified store has an existing Custom Order Guide.
- If you wish to clone a Build-To List then select one from the available dropdown list
- Select the OG (Order Guide) and-or BT (Build-To List) for each store that you wish to clone the Custom Order Guide to.

- If the selected customer already has a Custom Order Guide then the OG Status will display an Informational icon.
- If you choose to clone a Custom Order Guide to a customer that already has one then the old one will be over-written.
- If the selected customer already has the maximum number of allowed Build-To Lists then the BT Status will display a Lock icon.

5. Click the **Save** button.

Cloning Results

McLanE Customer Number: 135 TEST ORDER ACCT 2641 MEADOWBROOK ROAD ROCKY MOUNT, NC 27802 9/14/2016

Items successfully cloned.

Build-To (PAR) List: Overwrite existing

| OG | BT | Customer Name | OG Status | OG Result | BT Status | BT Result | Message |
|--------------------------|--------------------------|--------------------|-----------|-----------|-----------|-----------|---------|
| <input type="checkbox"/> | <input type="checkbox"/> | TEST ORDER ACCOUNT | ⚠ | ✅ | | | |
| <input type="checkbox"/> | <input type="checkbox"/> | TEST ORDER ACCOUNT | ⚠ | ✅ | | | |

Please Note: All stores displayed in the listing are displayed based on the Owner, Chain, and Distribution Center. [hide legend](#)

OG = Order Guide

BT = Build-To (PAR) List

⚠ = Custom Order Guide/Build To List already exists for this customer

🔒 = This customer already has the maximum number of Build-To (PAR) Lists

✅ = The clone succeeded for this item

❌ = The clone failed for this item

[back to home](#)

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Figure 40: Cloning Results,

6. Each selected Customer will have the result of the cloning process for the Custom Order Guide and-or the Build-To List updated.
7. To view the Cloning Legend click [show legend](#)

OG = Order Guide

BT = Build-To (PAR) List

⚠ = Custom Order Guide/Build To List already exists for this customer

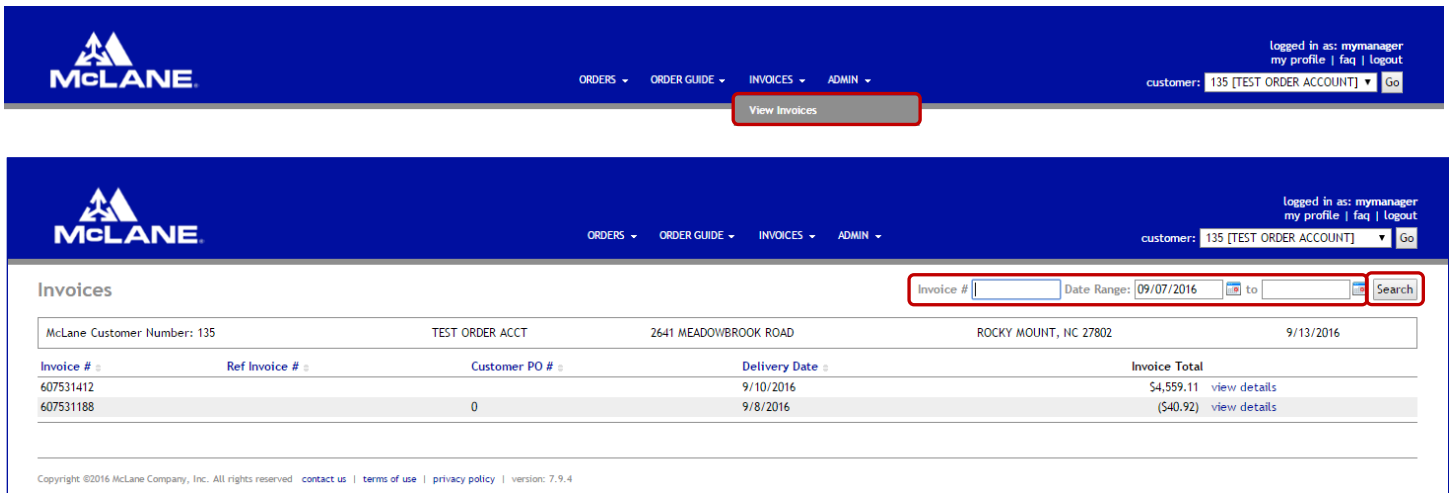
🔒 = This customer already has the maximum number of Build-To (PAR) Lists

✅ = The clone succeeded for this item

❌ = The clone failed for this item

Figure 41: Cloning Legend

5. Invoices Menu Options



The screenshot shows the top navigation bar of the McLane website. The 'View Invoices' button is highlighted with a red box. The user is logged in as 'mymanager' and the customer is '135 [TEST ORDER ACCOUNT]'.

Figure 42: View Invoices

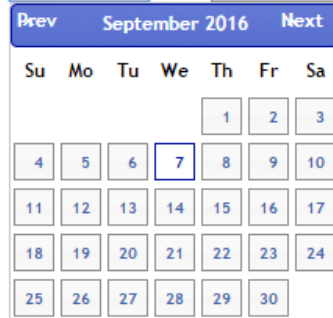
5.1. Viewing your Invoices...

1. Click Invoices
2. Enter a specific Invoice Number (optional)

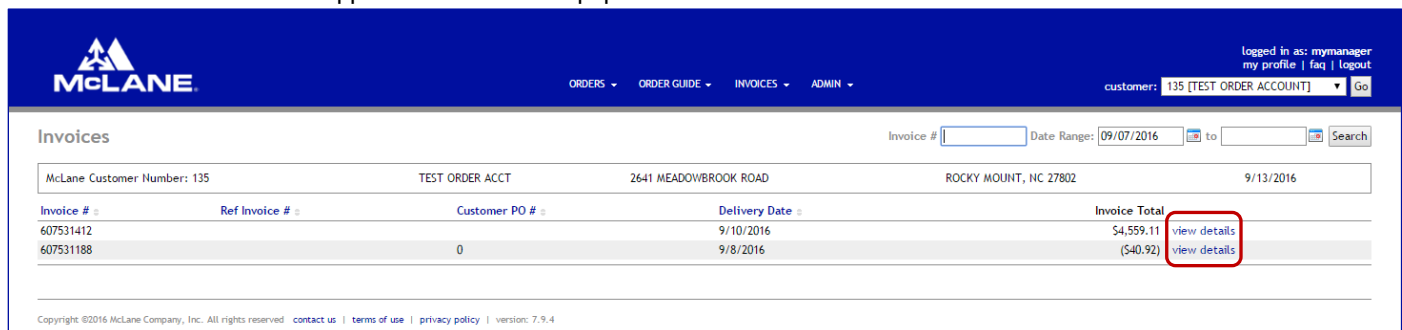
Invoice #

3. Select a Start Date and End Date

Date Range: to



4. Click the button.
5. Results for the supplied criteria will be populated.



The screenshot shows the search results for invoices. The 'view details' link for the invoice with number 607531188 is highlighted with a red box. The search criteria are: Invoice # (empty), Date Range: 09/07/2016 to (empty).

| Invoice # | Ref Invoice # | Customer PO # | Delivery Date | Invoice Total |
|-----------|---------------|---------------|---------------|---|
| 607531412 | | | 9/10/2016 | \$4,559.11 view details |
| 607531188 | 0 | | 9/8/2016 | (\$40.92) view details |

Figure 43: Invoice Search Results

6. Click the view details option to view the selected Invoice details

Invoice Detail

Owner: 1
Description: TEST ORDER ACCOUNT

| Delivery Date | Invoice # | Ref Invoice # | Unit # | Cases | Misc Tax | Sales Tax | Invoice Total |
|---------------|-----------|---------------|--------|-------|----------|-----------|---------------|
| 9/10/2016 | 607531412 | | 1213 | 134 | 50.20 | \$13.58 | \$4,559.11 |

| Customer PO# | Customer # | Customer Name | Customer Address | Distribution Center |
|--------------|------------|--------------------|---|-----------------------------|
| 0 | 135 | TEST ORDER ACCOUNT | 2641 MEADOWBROOK ROAD , ROCKY MOUNT, NC 27802 | MBM CORP - ROCKY MOUNT (07) |

Shipping Instructions
MGR

| Ship Qty | Cust Item # | McLane Item # | Pack Size | Cust GL # | Item Shipped Desc | Catch Wt | Unit Price | Extended Price | Sales Tax | Misc Tax |
|----------|-------------|---------------|-----------|-----------|-----------------------------|----------|------------|----------------|-----------|----------|
| 1 | 99024 | 99024 | 188 CT | 50105 | BEEF ANGUS 2.80 OZ | N | \$97.65 | \$97.65 | \$0.00 | \$0.00 |
| 6 | 1216 | 87777 | 270 CT | 50105 | CTI 9:1 BEEF PATTY | N | \$60.00 | \$360.00 | \$0.00 | \$0.00 |
| 1 | 5341 | 77571 | 10/4 LB | 50120 | CHILI HOT DOG/NO LFTB | N | \$63.54 | \$63.54 | \$0.00 | \$0.00 |
| 6 | 1895 | 67050 | 8/5# | 50127 | CHICKEN TENDER, FRZ 1.5OZ | N | \$77.34 | \$464.04 | \$0.00 | \$0.00 |
| 4 | 5726 | 54780 | 18/1.5# | 50130 | SLICED HAM | N | \$54.39 | \$217.56 | \$0.00 | \$0.00 |
| 1 | 96677 | 96677 | 600 CT | 50131 | FC APPLEWOOD THICK SL BACON | N | \$117.71 | \$117.71 | \$0.00 | \$0.00 |
| 1 | 14828 | 14828 | 20CT | 50165 | STEAK STRIP | N | \$58.02 | \$58.02 | \$0.00 | \$0.00 |
| 3 | 5866 | 59539 | 384/20Z | 50215 | SAUSAGE PATTY BNE | N | \$72.33 | \$216.99 | \$0.00 | \$0.00 |
| 2 | 8345 | 64783 | 140 | 50220 | BEEF STEAK FRITTER BNE | N | \$42.38 | \$84.76 | \$0.00 | \$0.00 |
| 1 | 1902 | 20734 | 8/5 LB | 50230 | BISCUIT FLOUR | N | \$12.98 | \$12.98 | \$0.00 | \$0.00 |

Figure 44: View Invoice Details

- To Print the Custom Order Guide click the button.
- To Export the Order History Detail to a Delimited Text File click the button and respond to the Save Export Confirmation.
- To Export the Order History Detail to an Excel Spreadsheet click the button and respond to the Save Export Confirmation.

6. Admin Menu Options

6.1. Managing your Users

The User Management option of the Admin Menu provides a listing of accounts related to the user that is currently logged in. The current user can only modify existing accounts or add new accounts that have a security role lower than their own. This relationship pertains to all levels and all accounts.

From this screen the user has the ability to edit existing account details, edit the customers assigned to a specific account, or to create a new account and assign the customers for that account.

ADMIN

- Click Admin
- Click User Management

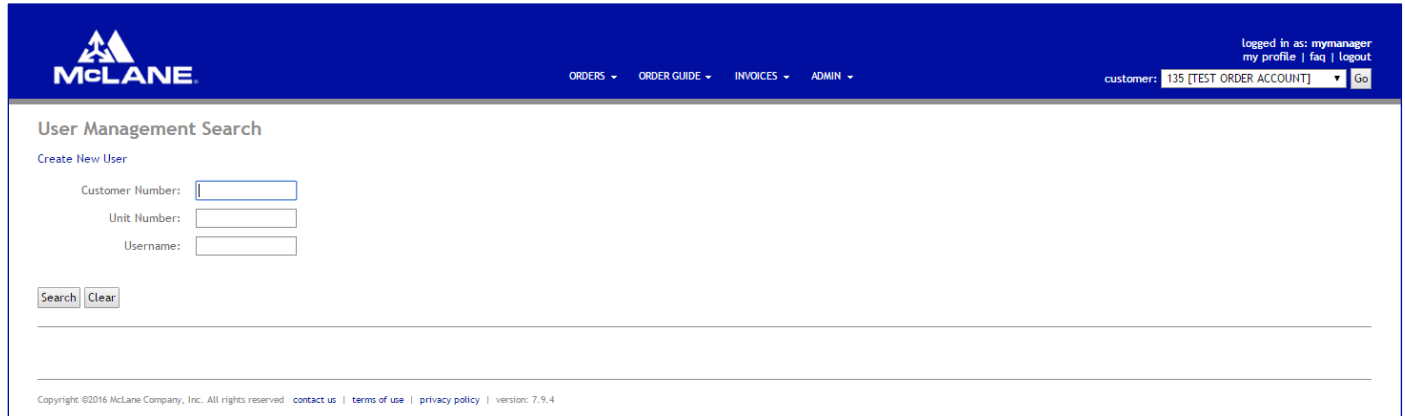


Figure 45: Admin Menu, User Management

6.1.1. Creating a New User ...

1. Click Admin
2. Click User Management
3. Click [Create New User](#)

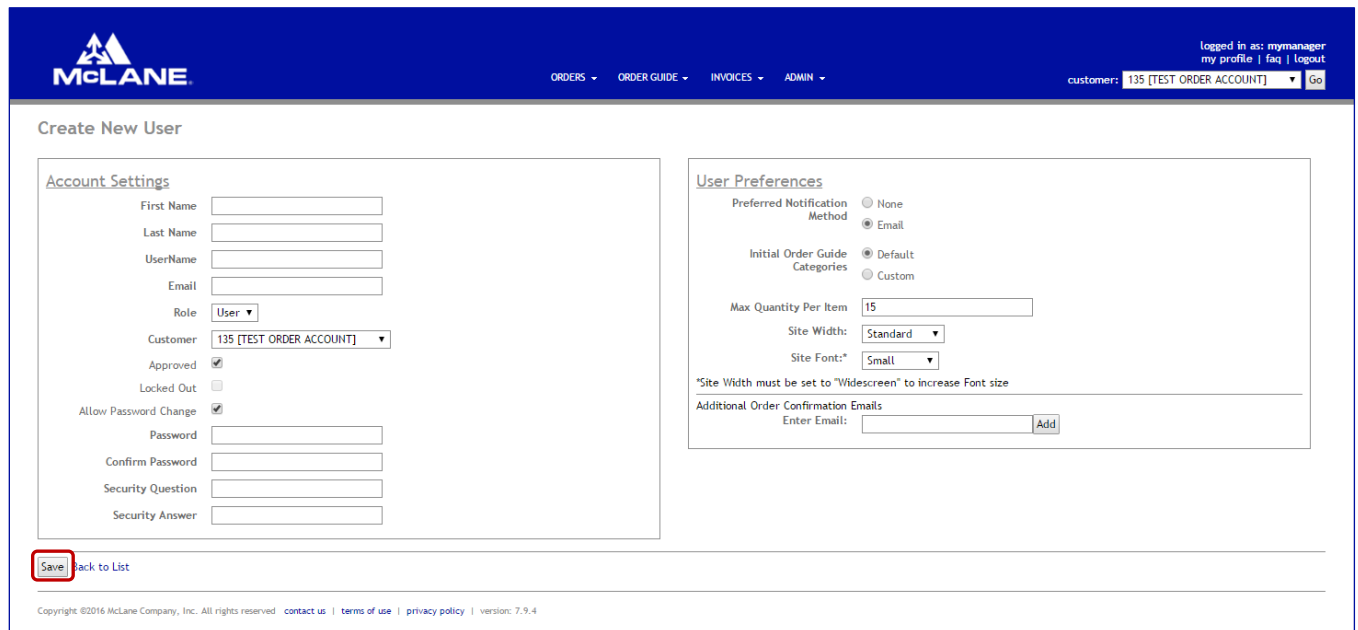
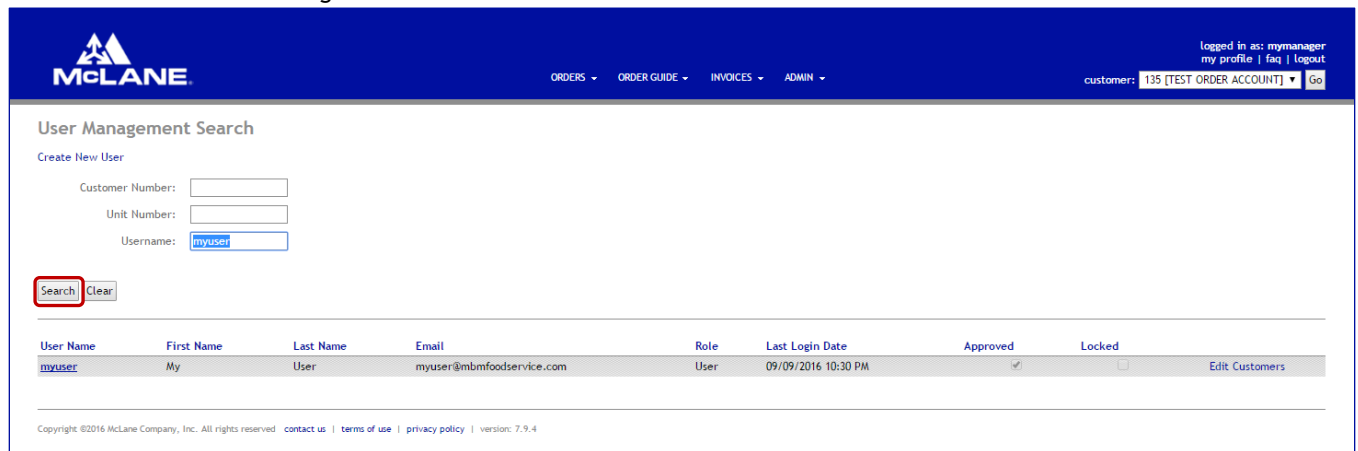


Figure 46: Create New User

4. Enter the user's First Name
5. Enter the Last Name
6. Enter the UserName
7. Enter a valid email address (this can be a duplicate email address)
8. Select the user's Security Role (The available roles will be less than or equal to the current users role).
9. Enter the Password (the password must be between 8 and 16 characters in length and contain 1 number, 1 letter, and 1 special character).
10. Confirm the Password.
11. Enter the Security Question.
12. Enter the Security Answer.
13. Click the **Save** button.
14. Click [Back to List](#) to return to the User List

6.1.2. Editing an Existing User ...

1. Click Admin
2. Click User Management



McLANE logo and navigation menu (ORDERS, ORDER GUIDE, INVOICES, ADMIN) are visible at the top. The user is logged in as 'mymanager'.

User Management Search

Create New User

Customer Number:
 Unit Number:
 Username:

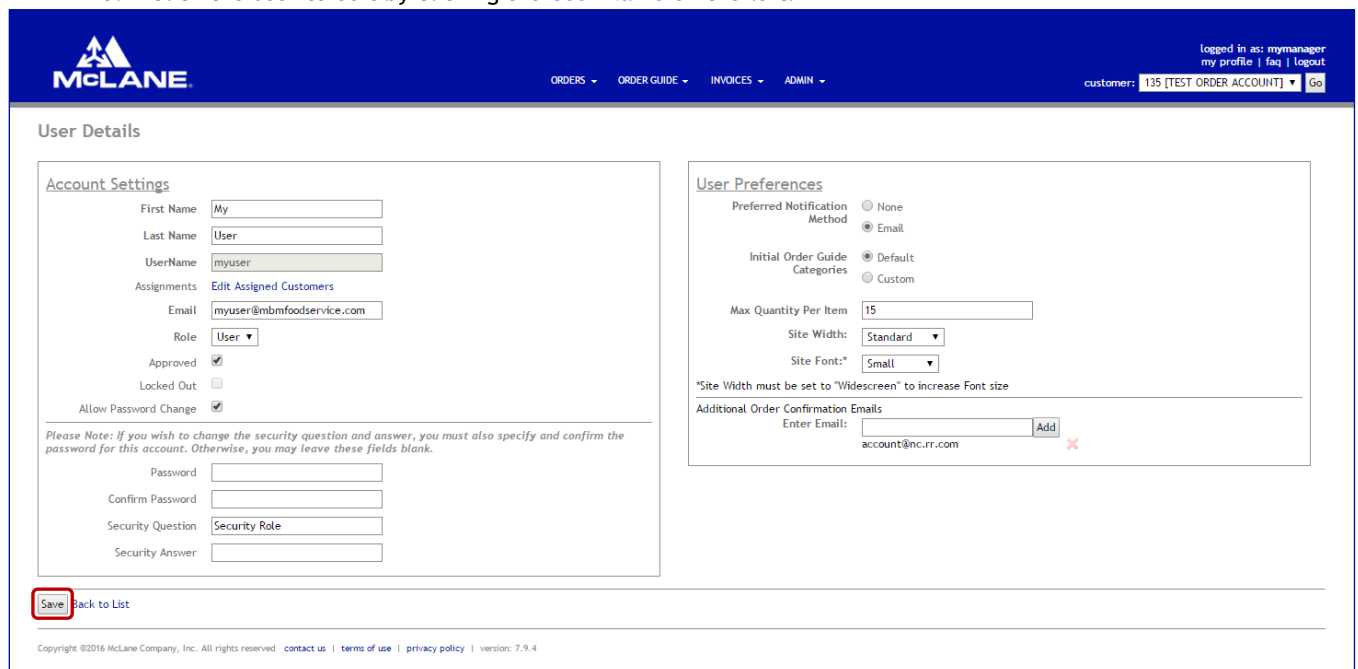
Search

| User Name | First Name | Last Name | Email | Role | Last Login Date | Approved | Locked |
|------------------------|------------|-----------|--------------------------|------|---------------------|-------------------------------------|--------------------------|
| myuser | My | User | myuser@mbmfodservice.com | User | 09/09/2016 10:30 PM | <input checked="" type="checkbox"/> | <input type="checkbox"/> |

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Figure 47: User Listing

3. Click the user to edit by clicking the **User Name** on the left.



McLANE logo and navigation menu are visible at the top. The user is logged in as 'mymanager'.

User Details

Account Settings

First Name:
 Last Name:
 Username:
 Assignments: [Edit Assigned Customers](#)
 Email:
 Role:
 Approved:
 Locked Out:
 Allow Password Change:

Please Note: If you wish to change the security question and answer, you must also specify and confirm the password for this account. Otherwise, you may leave these fields blank.

Password:
 Confirm Password:
 Security Question:
 Security Answer:

User Preferences

Preferred Notification Method: None Email
 Initial Order Guide Categories: Default Custom
 Max Quantity Per Item:
 Site Width:
 Site Font:
 *Site Width must be set to "Widescreen" to increase Font size

Additional Order Confirmation Emails
 Enter Email:

Save [Back to List](#)

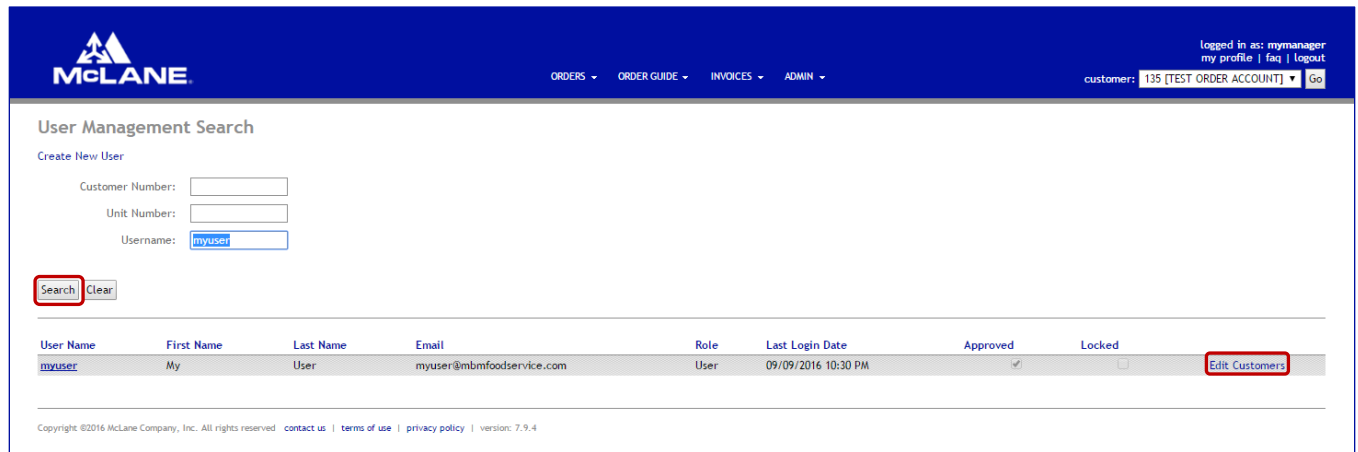
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Figure 48: View User Details

4. Edit any of the user details
5. To Save the New User account click the **Save** button.
6. Click [Back to List](#) to return to the User List

6.1.3. Edit User Assignments ...

1. Click Admin
2. Click User Management



User Management Search

Create New User

Customer Number:

Unit Number:

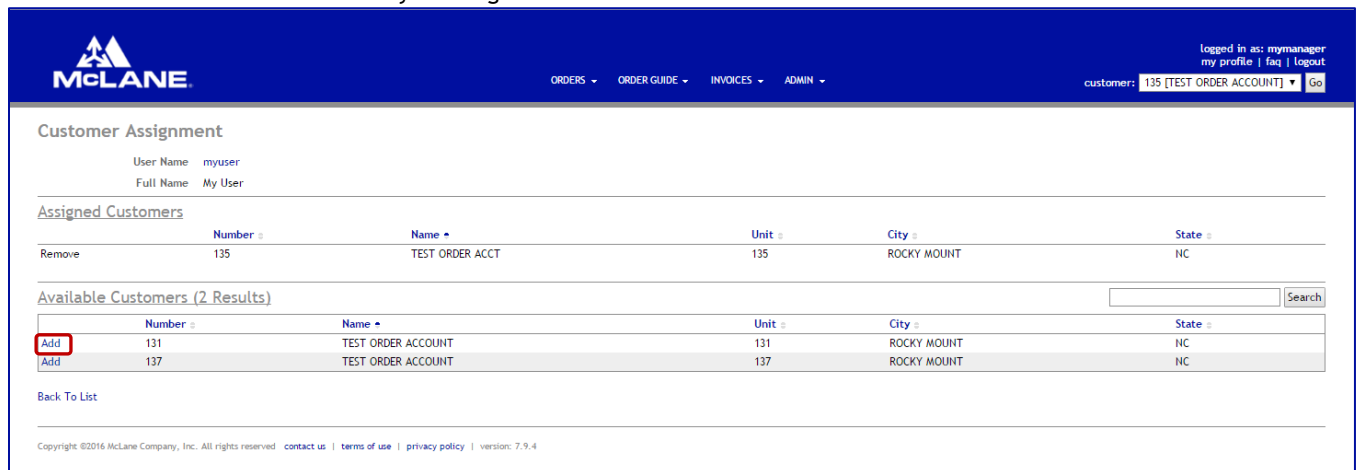
Username:

| User Name | First Name | Last Name | Email | Role | Last Login Date | Approved | Locked | |
|-----------|------------|-----------|---------------------------|------|---------------------|-------------------------------------|--------------------------|---|
| myuser | My | User | myuser@mbmfoodservice.com | User | 09/09/2016 10:30 PM | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="button" value="Edit Customers"/> |

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Figure 49: User Listing

3. Click the user to edit by clicking the **Edit Customers** on the left.



Customer Assignment

User Name myuser
Full Name My User

Assigned Customers

| Remove | Number | Name | Unit | City | State |
|--------|--------|-----------------|------|-------------|-------|
| | 135 | TEST ORDER ACCT | 135 | ROCKY MOUNT | NC |

Available Customers (2 Results)

| | Number | Name | Unit | City | State |
|------------------------------------|--------|--------------------|------|-------------|-------|
| <input type="button" value="Add"/> | 131 | TEST ORDER ACCOUNT | 131 | ROCKY MOUNT | NC |
| <input type="button" value="Add"/> | 137 | TEST ORDER ACCOUNT | 137 | ROCKY MOUNT | NC |

[Back To List](#)

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Figure 50: Edit Customer Assignments

4. Search for the required customer by either **Number** or **Name**.
5. Click the **Add** button next to the required customer.
6. Click **Back to List** to return to the User List

7. Additional Features

7.1. Resetting your Password

1. Go to the McLane Company, Inc. Web Ordering System website <https://www.mbmeserv.com>.
2. From the Login page click **forgot password**.



The screenshot shows the 'Log In' page of the McLANE customer website. At the top left is the McLANE logo. Below it, the heading 'Log In' is displayed. There are two input fields: 'User Name' and 'Password'. Below the 'Password' field are two buttons: 'Log In' and 'forgot password?'. To the right of the input fields, a welcome message reads: 'Welcome to McLane's customer website. As a valued customer, we are always looking for ways to improve our services to you. Please Log In.' At the bottom, there is a copyright notice: 'Copyright ©2016 McLane Company, Inc. All rights reserved contact us | terms of use | privacy policy | version: 7.9.4'.

Figure 51: forgot password

3. Enter your User Name and click the button.



The screenshot shows the 'Password Reset' page. At the top left is the McLANE logo. Below it, the heading 'Password Reset' is displayed. There is one input field labeled 'User Name' containing the text 'mymanager'. Below the input field are two buttons: 'Continue' and 'back to login'. At the bottom, there is a copyright notice: 'Copyright ©2016 McLane Company, Inc. All rights reserved contact us | terms of use | privacy policy | version: 7.9.4'.

Figure 52: Password Reset User Name

4. Answer the Security Question and click the button.



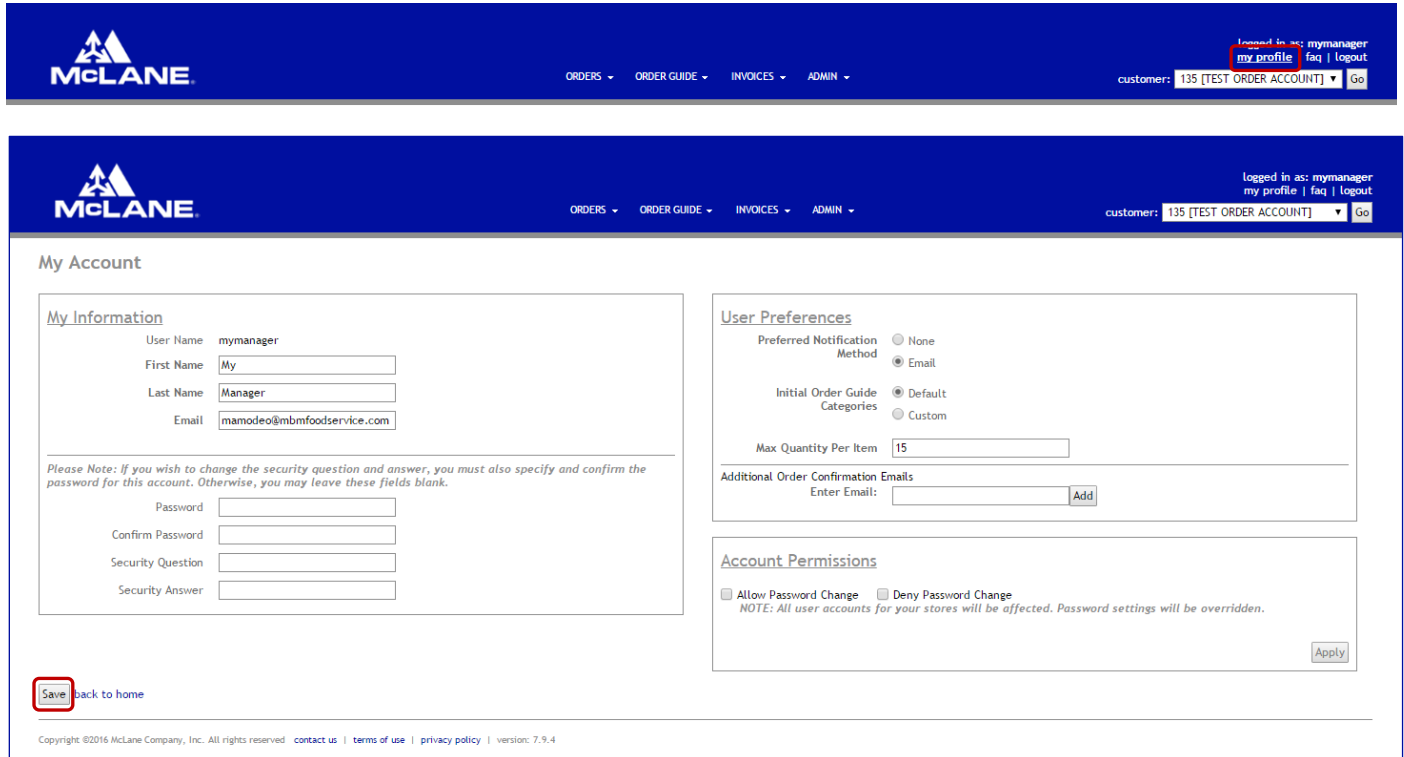
The screenshot shows the 'Password Reset' page. At the top left is the McLANE logo. Below it, the heading 'Password Reset' is displayed. There are two input fields: 'User Name' containing 'mymanager' and 'Security Question' containing 'Security Role'. Below the 'Security Question' field is an 'Answer' field containing several asterisks. Below the 'Answer' field are two buttons: 'Continue' and 'back to login'. At the bottom, there is a copyright notice: 'Copyright ©2016 McLane Company, Inc. All rights reserved contact us | terms of use | privacy policy | version: 7.9.4'.

Figure 53: Password Reset Security Answer

5. When your temporary password is emailed to you log in and change your password.

7.2. Setting Account Preferences

1. Go to the McLane Company, Inc. Web Ordering System website. i.e., <https://www.mbmeserv.com>.
2. Enter your “User Name” and “Password” and then click **Log In**.
3. Click [my profile](#).




The screenshot shows the 'My Account' page with a blue header. The header contains the McLane logo, navigation links (ORDERS, ORDER GUIDE, INVOICES, ADMIN), and user information (logged in as: mymanager, my profile, faq, logout) and a customer dropdown (customer: 135 [TEST ORDER ACCOUNT] Go). The main content area is titled 'My Account' and is divided into two columns. The left column is titled 'My Information' and contains fields for User Name (mymanager), First Name (My), Last Name (Manager), and Email (mamodeo@mbmfoodservice.com). Below these fields is a 'Please Note' section and fields for Password, Confirm Password, Security Question, and Security Answer. The right column is titled 'User Preferences' and contains radio buttons for Preferred Notification Method (None, Email), Initial Order Guide Categories (Default, Custom), and a Max Quantity Per Item field (15). Below this is an 'Additional Order Confirmation Emails' section with an 'Enter Email:' field and an 'Add' button. At the bottom of the right column is an 'Account Permissions' section with checkboxes for 'Allow Password Change' and 'Deny Password Change', and a note: 'NOTE: All user accounts for your stores will be affected. Password settings will be overridden.' and an 'Apply' button. A 'Save' button is located at the bottom left of the page, next to a 'back to home' link. The footer contains copyright information: Copyright ©2016 McLane Company, Inc. All rights reserved. contact us | terms of use | privacy policy | version: 7.9.4

Figure 54: my profile, User Preferences

4. Change your Preferred Notification Method.
5. Change your Initial Order Guide Categories.
6. Change your Max Quantity Per Item.
7. Click the **Save** button.
8. Click [back to home](#) to return to the Landing Page.

7.2.1. Additional Order Confirmation Emails



The screenshot shows the 'My Account' page with a blue header. The header contains the McLane logo, navigation links (ORDERS, ORDER GUIDE, INVOICES, ADMIN), and user information (logged in as: mymanager, my profile, faq, logout) and a customer dropdown (customer: 135 [TEST ORDER ACCOUNT] Go). The main content area is titled 'My Account' and is divided into two columns. The left column is titled 'My Information' and contains fields for User Name (mymanager), First Name (My), Last Name (Manager), and Email (mamodeo@mbmfoodservice.com). Below these fields is a 'Please Note' section and fields for Password, Confirm Password, Security Question, and Security Answer. The right column is titled 'User Preferences' and contains radio buttons for Preferred Notification Method (None, Email), Initial Order Guide Categories (Default, Custom), and a Max Quantity Per Item field (15). Below this is an 'Additional Order Confirmation Emails' section with an 'Enter Email:' field and an 'Add' button. At the bottom of the right column is an 'Account Permissions' section with checkboxes for 'Allow Password Change' and 'Deny Password Change', and a note: 'NOTE: All user accounts for your stores will be affected. Password settings will be overridden.' and an 'Apply' button. A 'Save' button is located at the bottom left of the page, next to a 'back to home' link. The footer contains copyright information: Copyright ©2016 McLane Company, Inc. All rights reserved. contact us | terms of use | privacy policy | version: 7.9.4

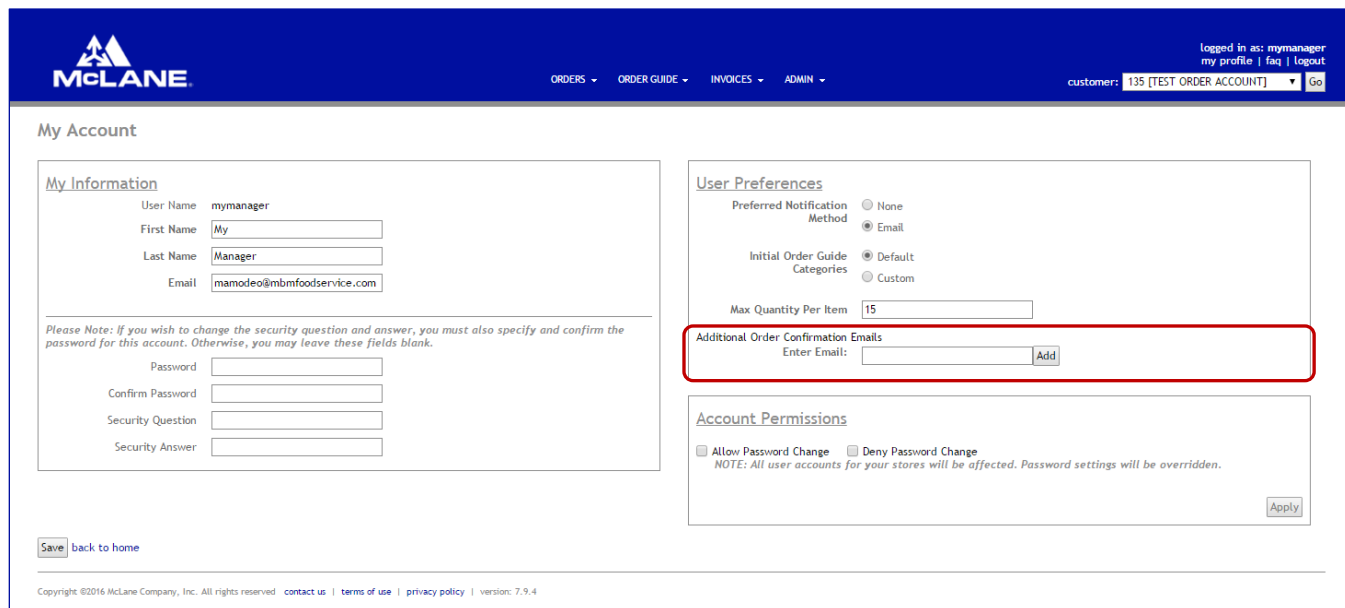


Figure 55: Additional Order Confirmation Emails

1. Go to the McLane Company, Inc. Web Ordering System website. i.e., <https://www.mbmeserv.com>.
2. Enter your “User Name” and “Password” and then click **Log In**.
3. Click [my profile](#).
4. Go to the Additional Order Confirmation Emails and enter a new email address and the click the **Add**

7.2.2. Account Permissions

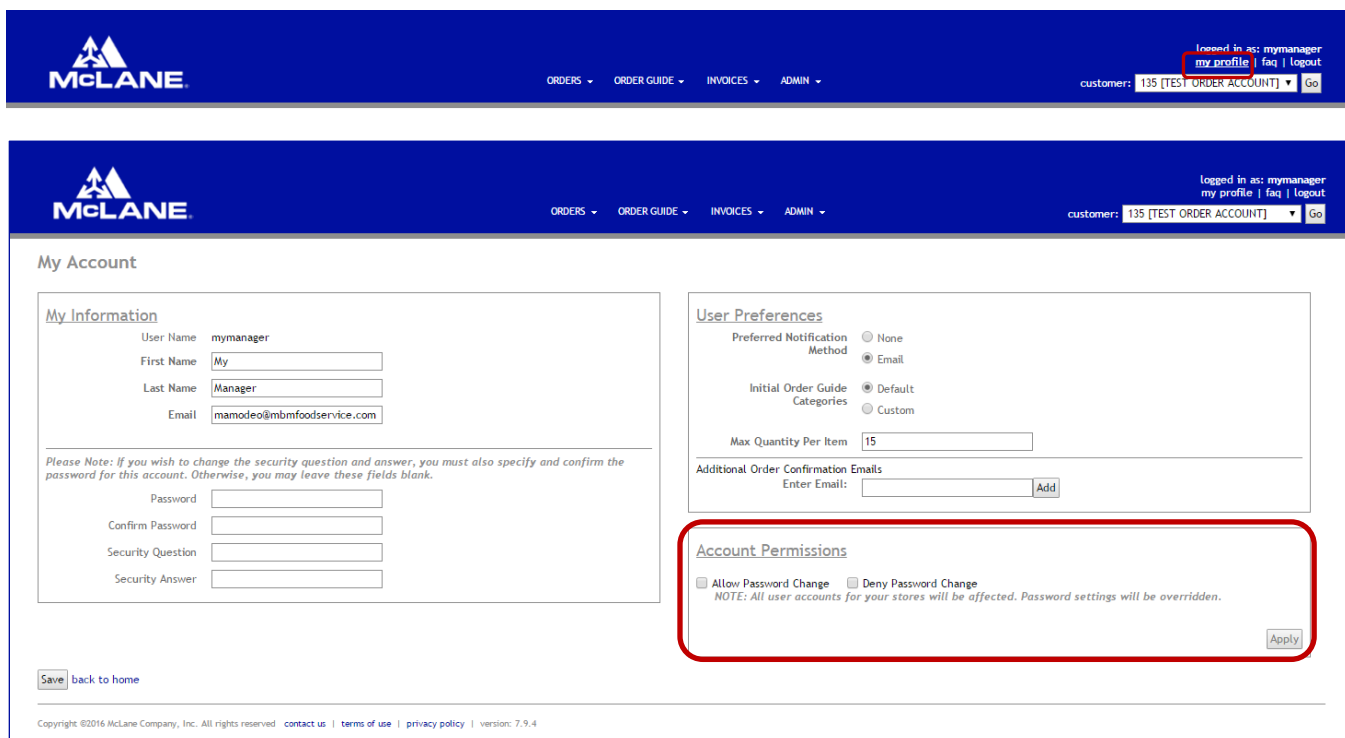


Figure 56: Account Permissions

1. Go to the McLane Company, Inc. Web Ordering System website. i.e., <https://www.mbmeserv.com>.
2. Enter your “User Name” and “Password” and then click **Log In**.
3. Click [my profile](#).
4. Go to the Account Permissions and set the permissions by either checking selecting the Allow or Deny Password Change options and the click the **Apply**

7.3. Frequently Asked Questions



The FAQ page provides the user with information pertaining to eServ. This information includes such items as Supported Browsers, Help Desk or Support Options, Documentation Downloads, and updated release notes for the current and previous versions of the web application.

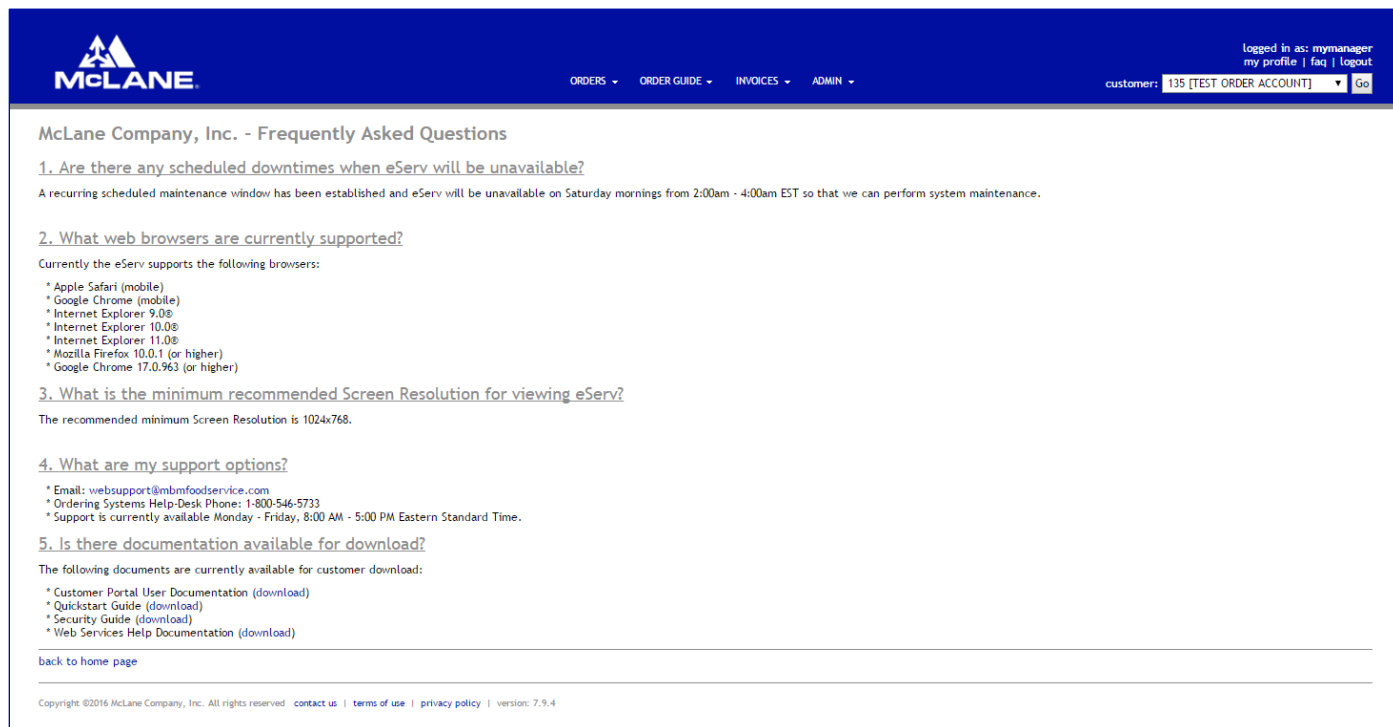


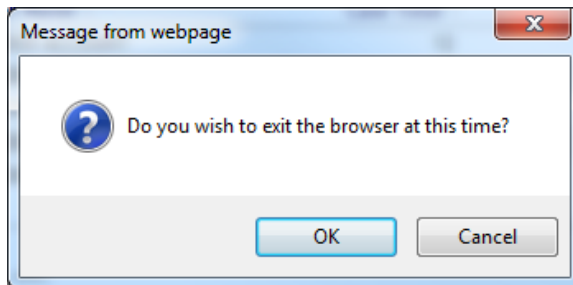
Figure 57: Frequently Asked Questions



7.4. Logout



7.4.1. Internet Explorer®

When a user clicks the [logout](#) button then they will be asked if they would like to exit the browser.



1. If you wish to close the browser click .
2. If you wish to cancel the exit process and go back to the Login page then click .

7.4.2. Other Supported Browsers

When a user clicks the [logout](#) button then they will go back to the Login page.

7.5. Close Browser

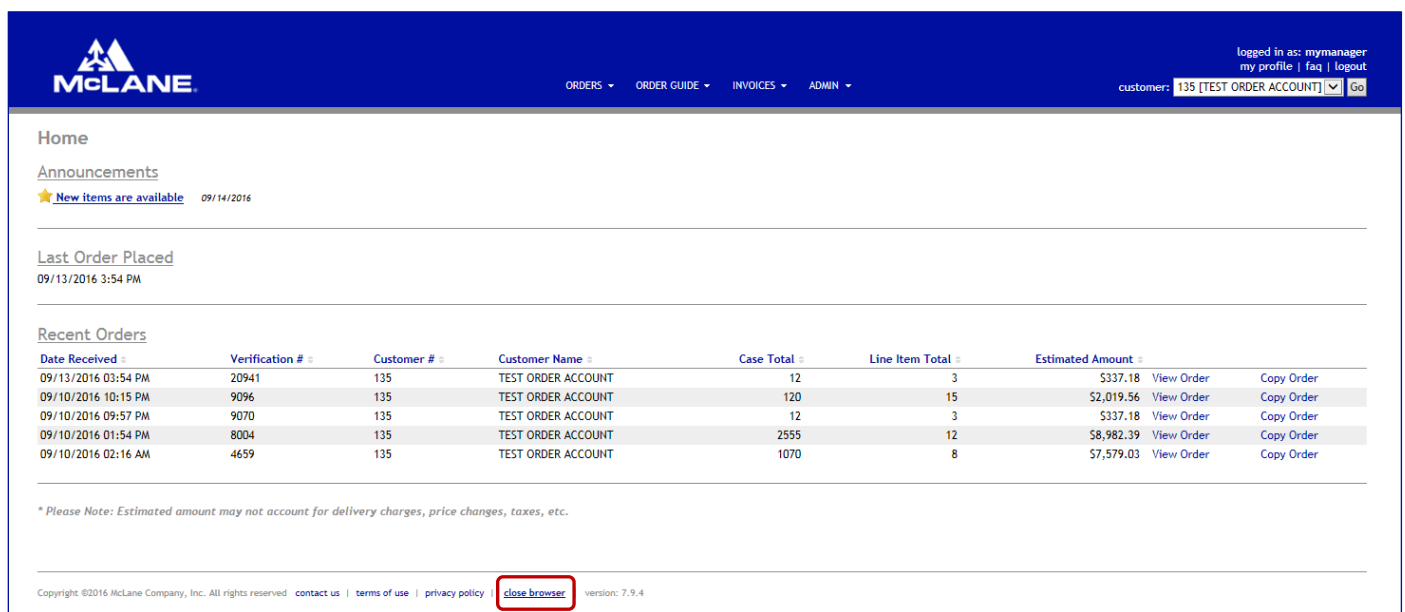
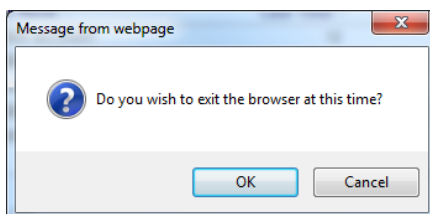




Figure 58: Page Footer, Close Browser

Customers using a supported version Internet Explorer® will also see the close browser option in the footer of all pages. If the user clicks this option then they will be asked if they would like to exit the browser.



1. If you wish to exit the browser click .
2. If you wish to cancel the process click .