US Foods® Online

QUICK REFERENCE GUIDE

PROFILE MANAGEMENT

UPDATING YOUR EMAIL ADDRESS

1. Click on **Your Name** at the top left of the screen and click **Basic Info.**
2. The email address that is currently on file will display under Current Email.
3. Enter your new email address into New Email, and retype your email address into Confirm Email.
4. You can also change whether or not you'd like to receive notices of changes to My Info or notices when an order status changes.
5. A validation code will then be sent to the email address you just submitted. Open your email and enter the validation code in the Validation Code box. Click **Submit.**
6. If needed, you can request an additional validation code by clicking **Resend Code.**

CHANGING YOUR PASSWORD

1. Click on **Your Name** at the top left of the screen and click **Account Admin.**
2. Reset your password by typing your new password into the Enter New Password text box, and then again into the Confirm New Password text box.
3. Click **Change Password.**
4. You can also update your Security Questions from this page.

SEARCH CATALOG

There are multiple ways to search the catalog on usfoods.com.

SEARCHING THE CATALOG

1. The Search Catalog box is available on the home page, in list views, and while submitting an order.
2. Enter any description into the Search Catalog box and hit **Enter.** (Multiple keywords can be used to further narrow your search.)
3. Another option is to make a category or brand selection from the dropdown box box that appears when you begin typing. This will return a list of all products, as well as categories and brands that contain the word in the product description and detailed description fields. (Items that on are your order guide will appear at the top of the list.)
4. Any selected product can be added to an open order, an existing order or a shopping list.

SHOP PRODUCTS

There are multiple ways to shop for products on usfoods.com.

1. By hovering over the **Shop Products** text at the top left of the horizontal navigation bar, you can select any product class to directly browse.
2. By clicking the **Shop Products** text at the top left of the horizontal navigation bar, you are guided to a page allowing you to further filter browsing results (e.g., product category, products on the order guide, nutritional claims, brands).
3. Any selected product can be added to a new order, an existing order or a shopping list.

USING FILTERS

1. At the top of the list, you have the choice of viewing products in list or grid format. (Grid format offers larger pictures.) You can also sort by relevancy, pack size, etc., or alphabetically.
2. Products that are currently on your Order Guide will appear at the top of your results and will be indicated with a check mark.
3. Results can be further refined using a variety of filters available in the side bar.
   - My Order Guide
   - My Lists
   - Contracted Products
   - Recently Purchased
   - Nutritional Claims, Marketing Claims, Allergens, Brands, Manufacturers, etc.
4. Filters can be removed by clicking the **X** icon at the top left of the page on the sidebar. -or- Filters can be removed by clicking the X at the top left of the page on the sidebar or by unchecking the filter box.

SEARCH CATALOG (CNTD.)

ADDING PRODUCT TO AN ORDER

1. Click the green **Add to Order** button next to the product you would like to order.
2. You will then have the option to create a new order or add to an existing order.
3. A confirmation window will show that you have successfully added the product to the order, but you are able to change the quantity, if needed.

ADDING PRODUCT TO A SHOPPING LIST

1. Click **Add to**… next to the product you would like to add to a list.
2. A dropdown will appear allowing you to select your desired list.
3. A confirmation window will give you the option to add that product to a particular group. You can then choose to continue shopping or you can view the updated list.

CREATE AN ORDER

CREATE AN ORDER USING A SHOPPING LIST

1. Click the **Create Order** button on the home page or start an order from the Create Order menu at the top right of any page.
2. A dialog box will appear. Select the list that you would like to order from. Your delivery date will default to your next scheduled delivery. (You can schedule deliveries up to two weeks in advance, but only for scheduled delivery days.)
3. Click **Create.**
4. Browse products on the selected list and add case values in the provided cells.
5. The Current Order side bar will display your order totals and details.

ORDERING ITEMS NOT ON YOUR LIST

1. While on the order screen, type any search term into the Search Catalog box at the top right of the screen.
2. A list of items in the catalog matching your search term will appear. Choose the appropriate item and click **Add to Order.**
3. A dialog box will appear, allowing you to adjust order quantities, remove from order, continue shopping or review and submit your order.

CREATE AN ORDER (CNTD.)

CREATE AN ORDER USING QUICK ENTRY

1. Click the **Create Order** button on the home page or start an order an order from the Create Order menu at the top right of any page.
2. A dialog box will appear. Select the **Quick Entry** option. You can order by shopping list line number or product number to quickly create an order.
3. A dialog box will appear asking you to confirm that you are working from an updated list.
4. You can now use Line # or Product # to select product, and then add case quantities to each product.
5. Repeat this process until you've selected all products needed for this order.

IMPORTING AN ORDER

1. Click the Create Order button on the home page or start an order from the Create Order menu at the top right of any page.
2. A dialog box will appear. Select the **Import** option.
3. Click **Choose File** to navigate to the locally stored file for upload. Select the correct **Data Format** from the dropdown menu.
4. Click **Create.**
5. For assistantance with proper file formatting, click the **Additional Assistance** link at the bottom of this dialog box.

REVIEW AND SUBMIT AN ORDER

1. On the Current Order sidebar, click **Review Order.**
2. Click **Submit** to submit the order for processing.

MODIFY AN ORDER

1. Click the order you wish to modify from the Home Page, or by hovering over the **Current Order** link at the top right of the page and select **Review Order.**
2. From here, you can change quantities of products already ordered, or add new products by using the Quick Entry function on the right or by using the Catalog Search field at the top right of the page.

CANCEL AN ORDER

1. Click the order you wish to cancel from the Home Page, or by hovering over the **Current Order** link at the top right of the page and selecting **Review Order.**
2. Click the **Cancel Order** text located directly under the Submit button. A dialog box will appear asking if you're sure you want to cancel. Click **Yes.**

CREATE A LIST

CREATING A LIST FROM SCRATCH

1. Hover over the **List** menu on the toolbar.
2. Select **Create List** from the dropdown menu.
3. Select **New List** and enter a unique list name.
4. Click **Create.**
5. A new empty list will be created, allowing you to add groups and products.

CREATING A LIST BY COPYING EXISTING LISTS

1. Hover over the **List** menu on the toolbar.
2. Click **Create List** from the dropdown menu.
3. Select the **Copy List** option.
4. Select the list you would like to copy from the dropdown menu.
5. Enter a new, unique name for the list.
6. Click **Create.** The edit list page will appear, allowing you to make changes to the new, copied list.

CREATING A LIST BY IMPORTING A FILE

1. Hover over the **List** menu on the toolbar.
2. Click **Create List** from the dropdown menu.
3. Select the **Import List** option.
4. Click **Choose File.**
5. A new window will open; navigate to the correct file to be uploaded and double click the **File Name.**
6. Select CSV or Edge file format from the dropdown menu.
7. A enter a unique name for the list and click **Create.**

ADDING GROUPS TO A LIST

1. To add a new group, click on **Add Custom Group** on the left side of the page.
2. Enter the name of the custom group.
3. Click **Add.**
4. Continue this process until all needed groups are added.

CREATE A LIST (CNTD.)

ADDING PRODUCT TO A LIST FROM CATALOG SEARCH

1. Enter any search term into the Catalog Search box at the top right of the screen.
2. Select the product to be added and click **Add to**…
3. All of your shopping lists will appear in a dropdown menu. Select the list by clicking on it.
4. From the dropdown menu, select the appropriate group. If you do not select a group, this product will be added to **Unassigned.**
5. Click **Continue Shopping** to add another product, or click **View List** to return to the list page.

ADDING PRODUCTS USING PRODUCT NUMBER

1. Click the group to which you would like to add product.
2. Click **Add Product** at the top right of the page.
3. Key in the product number in the Product # field. Click **Add Product.**

MODIFY A LIST

MOVE PRODUCTS BETWEEN GROUPS

1. Click the **Move** icon on the right side of the product to be moved.
2. Select the group from the dropdown menu.

COPY PRODUCTS BETWEEN GROUPS

1. Click the **Copy** icon on the right side of the product to be moved.
2. Select the group from the dropdown menu.

REMOVING PRODUCTS FROM LISTS

1. On the **Edit List** page, click the **X** icon next to the product you wish to remove.

RENAMING A LIST

1. Hover over the **List** menu on the toolbar and select **View All Lists.**
2. To the right of the list name, click on the **Options** menu. Select **Edit List Name.**
3. Rename the list and click **Save.**

MODIFY A LIST (CNTD.)

DOWNLOADING A SHOPPING LIST

1. Hover over the **List** menu on the toolbar and select **View All Lists.**
2. To the right of the list name, click on the **Options** menu. Select **Download.**
3. A dialog box will appear allowing you to select the file name and format.
4. You may select **All** to download the entire list, or you may download a specific group.
5. Click **Download.**

PRINTING A SHOPPING LIST

1. Hover over the **List** menu on the toolbar and select **View All Lists.**
2. To the right of the list name, click on the **Options** menu. Select **Print.**
3. A new window will open with a PDF version of your shopping list. Use the print function within your browser to complete printing.

If you have pop-up blocker enabled, you will need to allow pop-ups from usfoods.com.

DELETE A SHOPPING LIST

1. Hover over the **List** menu on the toolbar and select **View All Lists.**
2. Click on the **X** icon next to the list you want to delete and then click **Continue.**

You cannot remove lists that are managed by US Foods®. Once a list is deleted, this action cannot be undone.

INVOICE RETRIEVAL

VIEW AND DOWNLOAD INVOICES

1. Hover over **My Business,** select **Invoices** from the drop down menu.
2. Under **View Invoice** click **Get Details.**
3. Adjust the start and end dates and click **Search** to find invoices posted within a certain time period.
4. You can also find specific invoices by typing the invoice number and clicking **Search Invoices.**
5. Check the box next to the invoices you would like to view.
6. Select the invoice format from the dropdown menu at the top of the list and click **Download Invoices.**

Multiple invoices will be packaged in a zip file. You will need to unzip this file to view invoices. You can select and download up to 50 invoices at a time.

INVOICE RETRIEVAL (CNTD.)

CHECK ACCOUNT STATUS

1. Hover over **My Business,** select **Invoices** from the drop down menu.
2. Under Check Account Status click **Get Details.**
3. Your accounts receivable balance, all open invoices and unused credits will appear.
4. If you have made any partial payments, this will be displayed in a separate column.

ONE TIME PAYMENTS

Email addresses are required to make payments online. See Profile Management in order to add your email address to your profile.

SCHEDULING A ONE TIME PAYMENT

1. Hover over **My Business,** select **Invoices and Payments** from the drop down menu.
   If you do not see Payments as an option, please contact your US Foods® representative to request access.
2. Under Make One Time Payment click **Get Details.**
3. You can select **Select All Due Invoices** to pay all current invoices that are currently due or you can use the check boxes to select individual invoices you would like to pay.
4. To make a partial payment on an invoice, simply change the invoice's payment amount.
5. The number of invoices and payment total will be displayed at the top of the screen.
6. When you're ready to submit your payment click **Next.**

REVIEW AND SUBMIT PAYMENTS

1. All invoices and credits are grouped by Customer Location.
2. The total payment amount will be shown at the top of the page.
3. You will need to specify the bank account for each payment. For each customer location, click **Add Bank Account.**
4. If you have previously made online payments with US Foods, this information may already be in our system. If not, we will require your routing number, bank name, and checking account number.
5. Once you've set up the payment to your liking, click **Submit.**
6. A Payment Confirmation will be displayed, as well as an email sent to the account on file.
7. You can submit an additional one time payment by clicking **Manage Payments.**

INVOICE RETRIEVAL (CNTD.)

SCHEDULING PAYMENT IN ADVANCE

1. You are able to schedule payments up to 7 days in advance.
2. Do this by changing the Payment Date on the Review and Submit Payment page.

VIEW SCHEDULED PAYMENTS

1. Hover over **My Business,** select **Invoices and Payments** from the drop down menu.
2. Under Scheduled Payments click **Get Details.**
3. Click **View Details** to see more information about any scheduled payment.

CANCEL SCHEDULED PAYMENTS

1. Hover over **My Business,** select **Invoices and Payments** from the drop down menu.
2. Under Scheduled Payments click **Get Details.**
3. Click **Cancel** to cancel a payment.
4. You can also cancel payments from the Payment Details page, by clicking the **Cancel** button on the bottom left.

AUTOPAY

SETTING UP AUTOPAY

1. Hover over **My Business,** select **Invoices and Payments** from the drop down menu. *If you do not see Payments as an option, please contact your US Foods representative to request access.*
2. Under **Manage AutoPay** click **Get Details.**
3. Check the box next to the location for which you want to setup AutoPay. Click **Next.**
4. Enter your bank and checking account information.
5. Select the first invoice date that want AutoPay to take effect.
6. Select whether or not you want to receive email notifications.
7. Click **Next.**
8. Review your payment information, agree to the **ACH/Direct Debit Terms and Conditions** and click **Submit.**
9. To setup AutoPay for another location, click **Manage AutoPay** from the **AutoPay Details** confirmation screen

AUTOPAY (CNTD.)

VIEW CURRENT AUTOPAY

1. Hover over **My Business,** select **Invoices and Payments** from the drop down menu.
2. Under **Manage AutoPay** click **Get Details.**
3. If you have any locations that are not setup with AutoPay, you will see a list of these locations. Click **View Current AutoPay** to view locations that are setup with AutoPay. (If all of your locations are on AutoPay, you will automatically land on the **Manage AutoPay Details** page)
4. Click on the **Customer Location** that you want to view. The AutoPay details will display at the bottom of the page

CANCEL AUTOPAY

1. You cannot cancel AutoPay through US Foods Online at this time. To cancel AutoPay for a location please call technical support at **1-800-214-6262.**

BUSINESS ANALYTICS AND PRODUCT USAGE

Business Analytics is a customizable, best-in-class reporting tool that allows customers to analyze their purchasing patterns and help them identify areas of opportunity where greater controls could benefit their operation.

ACCESSING BUSINESS ANALYTICS

1. Sign on to Usfoods.com
2. Hover over **My Business,** and select **Reports** from the dropdown menu.
3. Click on the **Access Business Analytics** link at the bottom left of the page and a new window will appear.

RUNNING REPORTS

1. Hover over the **Dashboards** link on the toolbar and select **Product Usage.**
2. The **Purchase Detail Descending Dollar Report** will run immediately for all customer numbers attached to the user ID.
3. The default date range for the report is Last Closed Week.
4. To run a report for specific dates, deselect the Last Closed Week and enter the desired dates in the Calendar Date fields.
   Note: Only one date range can be selected at a time.
5. Once reports are run, use column selectors to add additional reporting data fields:
   A. Time Attributes – turn on Calendar Year and Month for all data
   B. Customer Attributes – turn on Multi Unit, Division Info or Customer Name and Number (not applicable for single customer user IDs)
   C. Product Attributes – Class, category, group, brand type, proprietary product, catch weight indicator or short product description
   D. Click OK to add selections

BUSINESS ANALYTICS AND PRODUCT USAGE (CNTD.)

USING FILTERS TO SELECT DATA

1. Filters are available in all reporting areas of Business Analytics and allow the users to select or limit data brought back based on:
   A. Date range
   B. Customer Attributes
   C. Product Attributes
2. If no filters are selected, all data will be brought back for all customer numbers attached to the user ID.
3. Use the **Manufacturer Name (ID)** filter to run reports by manufacturer (e.g., Pilgrim's Pride Corp)
4. Use to the **Brand** filter to limit the report to a specific brand (e.g., Glenview Farms)
   Note: US Food Manufacturer name always equals the Brand name.

MOVING AND SORTING REPORT COLUMNS

Almost every column or row in a report can be moved or sorted on the fly

1. A moveable column or row is indicated by a foursided cursor and a grey bar appearing above a column or next to a row. Just drag the column or row to the desired location within the report (Internet Explorer only).
2. A sortable column or row is indicated by a set of UP/DOWN arrows next to the words inside the column header or row header.

PRINTING OR EXPORTING A REPORT

1. Once the report is run, scroll to the bottom of the report and select either Print or Export.