



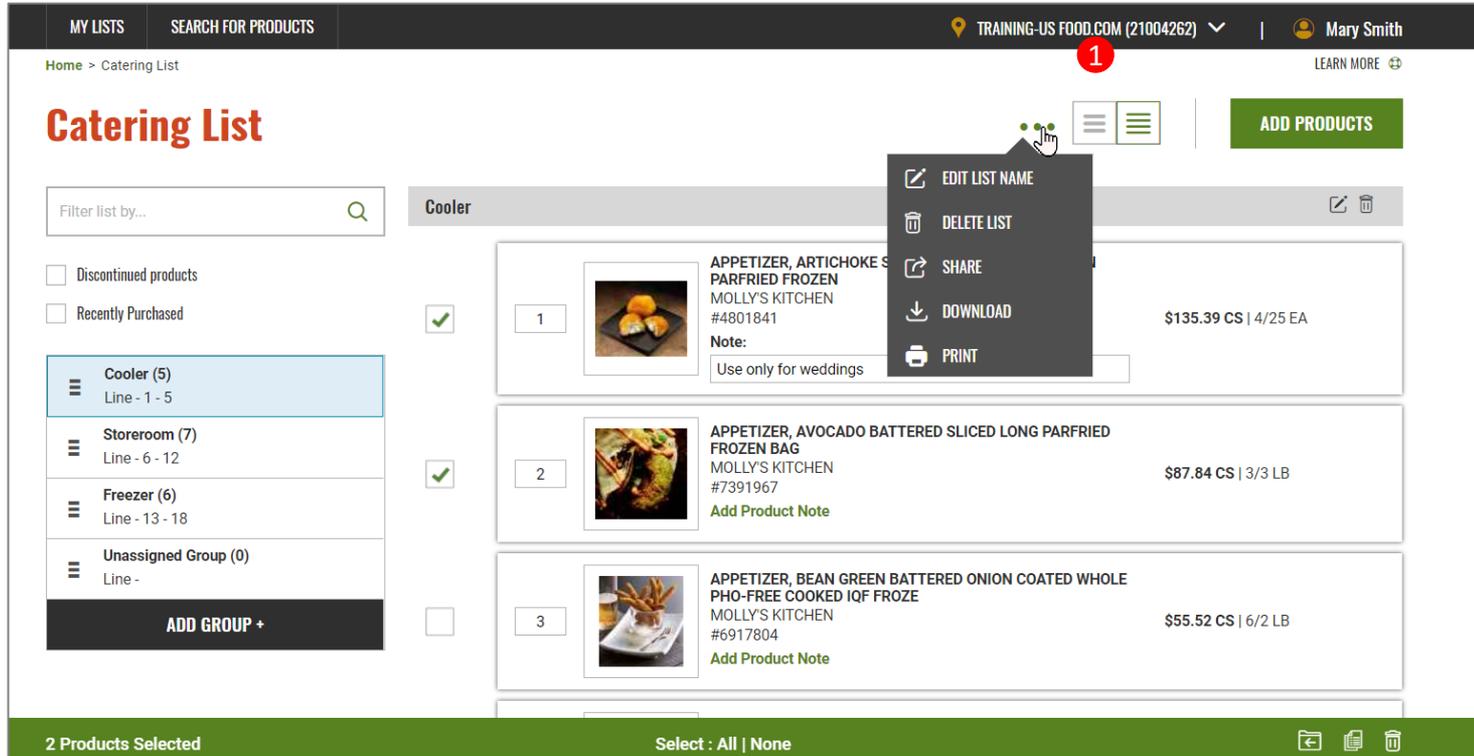
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# **List Management Application Managing Lists**

# List management edit features

From the list management edit screen you can:

1. Search the product catalog
2. Search within the list by filtering
3. Display only discontinued products
4. Display only Recently Purchased products



5. Rearrange groups by dragging and dropping
6. Add new groups
7. Edit the list name
8. Delete a list
9. Share a list
10. Download a list
11. Print a list

12. Change view from detailed to compact
13. Edit group name
14. Delete a group
15. Add products to a group
16. Move products from one group to another
17. Copy products from one

18. Delete products from the group

# MOVING PRODUCTS INTO THE ACTION BAR

# Moving products using drag and drop

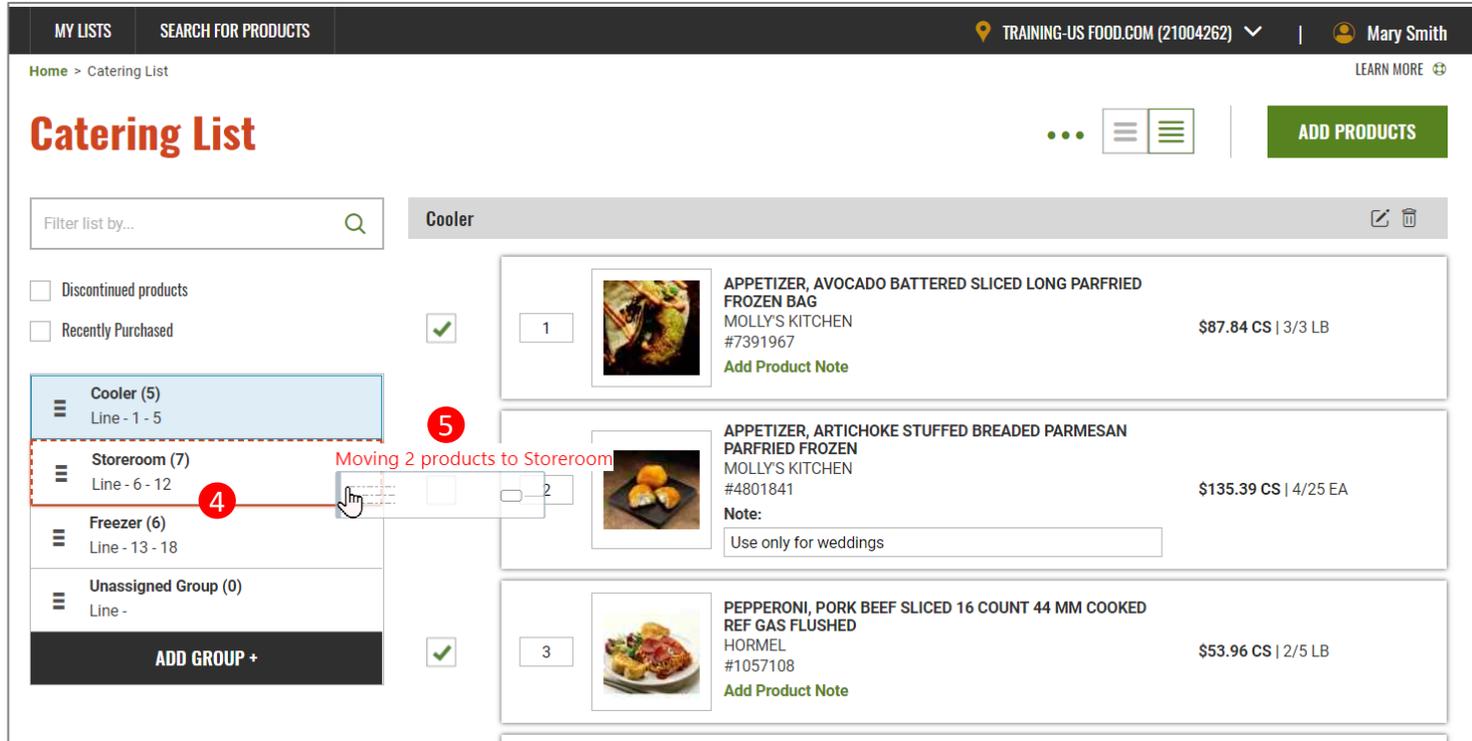
To move products using drag and drop:

1. Select the products to move. The selected products do not need to be sequential.
2. Float your cursor over the selected products until it turns to a 4 pointed cursor.
3. Left click your mouse and drag the products to a new position in the current group or a new group.

The screenshot shows the 'Catering List' interface. At the top, there are navigation tabs for 'MY LISTS' and 'SEARCH FOR PRODUCTS', along with user information for 'Mary Smith' and a location 'TRAINING-US FOOD.COM (21004262)'. The main heading is 'Catering List' with a search bar and a filter dropdown set to 'Cooler'. On the left, a sidebar shows a list of storage groups: 'Cooler (5) Line - 1 - 5', 'Storeroom (7) Line - 6 - 12', 'Freezer (6) Line - 13 - 18', and 'Unassigned Group (0) Line -'. The 'Cooler' group is selected. A red circle '1' with a checkmark is next to the 'Cooler' group, and another red circle '2' with a 4-pointed cursor is over the 'Cooler' group, indicating a drag-and-drop action. A red text overlay says 'Moving 2 products'. The main list shows three items in the 'Cooler' group, each with a quantity selector (1, 2, 3) and a checkmark. The first item is 'APPETIZER, ARTICHOKE STUFFED BREADED PARMESAN PARFRIED FROZEN' with a price of \$135.39 CS | 4/25 EA. The second item is 'APPETIZER, AVOCADO BATTERED SLICED LONG PARFRIED FROZEN BAG' with a price of \$87.84 CS | 3/3 LB. The third item is 'APPETIZER, BEAN GREEN BATTERED ONION COATED WHOLE PHO-FREE COOKED IQF FROZE' with a price of \$55.52 CS | 6/2 LB. At the bottom, a green bar shows '2 Products Selected' and 'Select : All | None'.

# Moving products using drag and drop

- When moving to a new group, the target group will be outlined in red.
- There will also be a note above the cursor indicating the number of products being moved and the target group name.
- Once the group is highlighted, release the mouse.
- The products will be moved to the top of the selected group and a success message will appear at the top of the screen.



# Moving groups using drag and drop

You can also move groups using drag and drop

1. Point to the drag bar in front of the group name.
2. Left click your mouse and drag the group to the new position.
3. When the group is in the desired position, release the mouse.

The screenshot shows a web interface for a 'Catering List'. At the top, there are navigation tabs for 'MY LISTS' and 'SEARCH FOR PRODUCTS', and a user profile for 'Mary Smith'. The main heading is 'Catering List'. On the left, there is a sidebar with a search bar and filter options: 'Discontinued products' and 'Recently Purchased'. Below these are group categories: 'Storeroom (9) Line - 4 - 12', 'Freezer (6) Line - 13 - 18', 'Cooler (3) Line - 1 - 3', and 'Unassigned Group (0) Line -'. A red circle with the number '1' highlights the drag bar (three horizontal lines) next to the 'Cooler (3)' group. To the right, a 'Cooler' section contains three product items, each with a numbered box (1, 2, 3) for moving. Item 1 is 'APPETIZER, ARTICHOKE STUFFED BREADED PARMESAN PARFRIED FROZEN' with a price of \$135.39 CS. Item 2 is 'APPETIZER, BEAN GREEN BATTERED ONION COATED WHOLE PHO-FREE COOKED IQF FROZE' with a price of \$55.52 CS. Item 3 is 'SAUCE, PIZZA TOMATO CAN SHELF STABLE' with a price of \$46.86 CS. The interface also includes an 'ADD PRODUCTS' button and a 'LEARN MORE' link.

# MOVING PRODUCTS USING LINE NUMBER

# Moving products by line number

You can move products by simply changing the line number. Products can be moved within the current group or to a new group.

To move within the group:

1. Enter the target line number in the line number box.
2. Tab off of the number.

The screenshot shows the 'Catering List' interface. At the top, there are navigation tabs for 'MY LISTS' and 'SEARCH FOR PRODUCTS', along with the user's name 'Mary Smith' and the company name 'TRAINING-US FOOD.COM (21004262)'. Below the navigation, the page title 'Catering List' is displayed in large red font. A search bar is present with the text 'Filter list by...'. On the left side, there are filter options: 'Discontinued products' and 'Recently Purchased'. Below these, a list of product groups is shown: 'Cooler (3) Line - 1 - 3', 'Storeroom (9) Line - 4 - 12', 'Freezer (6) Line - 13 - 18', and 'Unassigned Group (0) Line -'. A black button labeled 'ADD GROUP +' is at the bottom of this list. The main content area is titled 'Cooler' and contains three product cards. Each card has a checkbox on the left, a line number box, a product image, a description, a price, and a note field. The first card is for 'APPETIZER, ARTICHOKE STUFFED BREADED PARMESAN PARFRIED FROZEN' with line number '1'. The second card is for 'APPETIZER, BEAN GREEN BATTERED ONION COATED WHOLE PHO-FREE COOKED IQF FROZE' with line number '2'. The third card is for 'SAUCE, PIZZA TOMATO CAN SHELF STABLE' with line number '1'. A red circle with the number '1' is overlaid on the line number box of the third card, indicating the target line number for moving the product.

# Moving products by line number

You can move products by simply changing the line number. Products can be moved within the current group or to a new group.

To move within the group:

1. Enter the target line number in the line number box.
2. Tab off of the number.
3. The product will move to the target line number.

The screenshot shows the 'Catering List' interface for 'TRAINING-US FOOD.COM (21004262)'. The user is logged in as 'Mary Smith'. The page title is 'Catering List' and the breadcrumb is 'Home > Catering List'. There are navigation icons for a menu and a list view, and an 'ADD PRODUCTS' button.

On the left, there is a search bar 'Filter list by...' and two checkboxes: 'Discontinued products' and 'Recently Purchased'. Below these are three group categories with expandable menus:

- Cooler (3) Line - 1 - 3
- Storeroom (9) Line - 4 - 12
- Freezer (6) Line - 13 - 18
- Unassigned Group (0) Line -

At the bottom of this list is an 'ADD GROUP +' button.

The main content area is titled 'Cooler' and contains three product items, each with a checkbox and a line number box:

- Item 1:  **3** 1. Product: APPETIZER, BEAN GREEN BATTERED ONION COATED WHOLE PHO-FREE COOKED IQF FROZE. Price: \$55.52 CS | 6/2 LB.
- Item 2:  2. Product: SAUCE, PIZZA TOMATO CAN SHELF STABLE. Price: \$46.86 CS | 6/104 OZ. Note: Use for dipping sauce.
- Item 3:  3. Product: APPETIZER, ARTICHOKE STUFFED BREADED PARMESAN PARFRIED FROZEN. Price: \$135.39 CS | 4/25 EA. Note: Use only for weddings.

# Moving products by line number

Products can be moved from one group to another by changing the line number.

1. Group names are followed by a number in parenthesis. This number indicates the number of products in the group.
2. The line numbers within each group are noted below the group name.
3. To move a product to a new group, simply change the original line number to a line number within the target group.

The screenshot shows the 'Catering List' interface. At the top, there are navigation tabs for 'MY LISTS' and 'SEARCH FOR PRODUCTS', along with a location dropdown for 'TRAINING-US FOOD.COM (21004262)' and a user profile for 'Mary Smith'. Below the navigation, the breadcrumb 'Home > Catering List' is visible. The main title 'Catering List' is prominently displayed. On the left, there is a search bar and a filter section with checkboxes for 'Discontinued products' and 'Recently Purchased'. Below the filters, a list of product groups is shown: 'Cooler (3) Line - 1 - 3', 'Storeroom (9) Line - 4 - 12', 'Freezer (6) Line - 13 - 18', and 'Unassigned Group (0) Line -'. A red arrow points from the 'Freezer (6)' group to the '3' line number of the first product item. The product list includes three items: 1. 'APPETIZER, BEAN GREEN BATTERED ONION COATED WHOLE PHO-FREE COOKED IQF FROZE' by Molly's Kitchen, priced at \$55.52 CS | 6/2 LB. 2. 'SAUCE, PIZZA TOMATO CAN SHELF STABLE' by Don Pepino, priced at \$46.86 CS | 6/104 OZ, with a 'DIRECT' label and a note 'Use for dipping sauce'. 3. 'APPETIZER, ARTICHOKE STUFFED BREADED PARMESAN PARFRIED FROZEN' by Molly's Kitchen, priced at \$135.39 CS | 4/25 EA, with a note 'Use only for weddings'.

# MANAGING DISCONTINUED ITEMS

# Managing discontinued products

To simplify the management of discontinued products, list management:

1. Highlights discontinued products easy visibility.
2. You can also use the filter options to display only the discontinued products.
3. When you filter the list, the number after the group name indicates the number of filtered products in the group.

The screenshot displays the 'Master Order List' interface for 'Cooler' products. The top navigation bar includes 'MY LISTS', 'SEARCH FOR PRODUCTS', 'TRAINING-US FOOD.COM (21004262)', and the user 'Mary Smith'. The main title is 'Master Order List'. A search bar is present with the text 'Filter list by...'. A filter menu on the left shows 'Discontinued products' checked, with a red circle '2' next to it. Below the filter menu, a list of product groups is shown: 'Cooler (8) Line - 1 - 55', 'Storeroom (6) Line - 56 - 130', 'Freezer (1) Line - 131 - 151', and 'Unassigned Group (0) Line -'. A red circle '3' is next to the 'Cooler (8)' group. A tooltip above the 'Cooler' group says 'The Cooler has 8 discontinued products'. The main list shows four rows of products. The first row (line 13) shows a 'Discontinued Product' (CREAMER, HALF & HALF UHT DAIRY SS) and a 'Replacement Product' (CREAMER, HALF & HALF UHT DAIRY SS). The second row (line 20) shows a 'Discontinued Product' (AVOCADO, HALF FROZEN). The third row (line 25) shows a 'Discontinued Product' (BACON, PORK 14-18 COUNT SLAB) and a 'Replacement Product' (BACON, PORK 14-18 COUNT SLAB RAW FROZEN 1-DIAMOND). The fourth row (line 27) shows a 'Discontinued Product' (BACON, PORK 18-22 COUNT LAID OUT HICKORY SMOKED RAW FROZEN 3-DIAMOND). A red circle '1' is next to the first row. An 'ACCEPT REPLACEMENT' button is in the top right.

# Managing discontinued products

The screenshot shows a web interface for managing a product list. At the top, there's a search bar and navigation elements. The main area is titled "Order List" and shows a list of products under the "Cooler" category. Each product entry is a row with a checkbox on the left, a product description, an image, and a replacement product description. A red circle with the number "1" is placed above the first row, and a red circle with the number "2" is placed above the "Compare" button in the right-hand menu of the first row.

Item #	Discontinued Product	Replacement Product
13	CREAMER, HALF & HALF UHT DAIRY SS PLASTIC CUP REF GLENVIEW FARMS #3365665 NO PRICE   400 EA	CREAMER, HALF & HALF UHT DAIRY SS PLASTIC CUP SHELF STABLE GLENVIEW FARMS #9341223 \$23.49 CS   360/.375 OZ
20	AVOCADO, HALF FROZEN DEL PASADO #2332799 NO PRICE   4/3 LB	
25	BACON, PORK 14-18 COUNT SLAB HICKORY SMOKED RAW FROZEN 1- DIAMOND PATUXENT FARMS #4917365 NO PRICE   30 LB	BACON, PORK 14-18 COUNT SLAB RAW FROZEN 1-DIAMOND PATUXENT FARMS #6336010 \$109.38 CS   30 LB
27	BACON, PORK 18-22 COUNT LAID OUT HICKORY SMOKED RAW FROZEN 3-DIAMOND PATUXENT FARMS #4916987 NO PRICE   15 LB	

List Management has several features to help manage discontinued products

## Replacement Products

1. If a replacement product is available, it will show next to the discontinued product
2. Click on the Compare icon to easily compare the products

# Managing discontinued products

MY LISTS    SEARCH FOR PRODUCTS    TRAINING-US FOOD.COM (21004262)    Mary Smith

Back to Master Order List    LEARN MORE

## Product Comparison

Discontinued Product



This product is no longer available for purchase

Replacement Product



**REPLACE** 3

Product Description	CREAMER, HALF & HALF UHT DAIRY SS PLASTIC CUP REF #3365665	CREAMER, HALF & HALF UHT DAIRY SS PLASTIC CUP SHELF STABLE #9341223
Product Attributes		
Purchase History		
Product Class	DAIRY	DAIRY
Brand Name	GLENVIEW FARMS	GLENVIEW FARMS
Pack	400 EA	360/.375 OZ
Net Weight	8.91 LB	9.53 LB

[View More](#)

List Management has several features to help manage discontinued products.

## Replacement Products

1. If a replacement product is available, it will show next to the discontinued product
2. Click on the Compare icon to easily compare the products
3. If the replacement product is acceptable, click on the Replace button.
4. The discontinued product will be replaced with the replacement product

# Managing discontinued products

The screenshot shows the 'Master Order List' interface. At the top, there's a navigation bar with 'MY LISTS', 'SEARCH FOR PRODUCTS', and user information 'Mary Smith'. Below the navigation, the page title 'Master Order List' is displayed. A search bar and a filter section are on the left. The main content area shows a list of products under the category 'Cooler'. Two products are highlighted: a discontinued product (line 46) and a replacement product (line 49). The discontinued product is 'SOUR CREAM, CULTURED HEAVY TUB REF' with a price of 'NO PRICE | 2/5 LB'. The replacement product is 'SOUR CREAM, CULTURED ALL NATURAL SS TUBE REF' with a price of '\$14.32 CS | 100/1 OZ'. A red circle with the number '5' is placed over the 'Accept Replacement' button for the replacement product.

List Management has several features to help manage discontinued products.

## Replacement Products

1. If a replacement product is available, it will show next to the discontinued product
2. Click on the Compare icon to easily compare the products
3. If the replacement product is acceptable, click on the Replace button.
4. The discontinued product will be replaced with the replacement product.
5. If you don't need to compare products, just click on Accept Replacement

# Managing discontinued products

MY LISTS SEARCH FOR PRODUCTS TRAINING-US FOOD.COM (21004262) Mary Smith

Home > Master Order List

## Master Order List

ACCEPT REPLACEMENT

Filter list by...

Discontinued products  
 Recently Purchased

- Cooler (2)  
Line - 1 - 49
- Storeroom (3)  
Line - 50 - 122
- Freezer (1)  
Line - 123 - 143
- Unassigned Group (0)  
Line -

ADD GROUP +

**Cooler**

46 **Discontinued Product**  
SOUR CREAM, CULTURED HEAVY TUB REF  
GLENVIEW FARMS  
#7635246  
NO PRICE | 2/5 LB  
Add Product Note

49 **Discontinued Product**  
SOUR CREAM, CULTURED SS TUBE REF  
GLENVIEW FARMS  
#6605018  
NO PRICE | 100/1 OZ

**Replacement Product**  
SOUR CREAM, CULTURED ALL NATURAL  
SS TUBE REF  
GLENVIEW FARMS  
#2761791  
\$14.32 CS | 100/1 OZ

Accept Replacement

## Accept Replacement Products

1. If a replacement product is available, it will show next to the discontinued product
2. Click on the Accept Replacement icon.
3. The discontinued product will be replaced with the replacement product.
4. A success message will show at the top of the screen and the updated product will no longer show on the screen.
5. Continue managing the remaining discontinued products.
6. To view all products, unselect the Discontinued filter.

MY LISTS SEARCH FOR PRODUCTS TRAINING-US FOOD.COM (21004262) Mary Smith

Home > Master Order List

## Master Order List

ACCEPT REPLACEMENT

Filter list by...

Discontinued products  
 Recently Purchased

- Cooler (1)  
Line - 1 - 49
- Storeroom (3)  
Line - 50 - 122
- Freezer (1)  
Line - 123 - 143
- Unassigned Group (0)  
Line -

ADD GROUP +

**Cooler**

46 **Discontinued Product**  
SOUR CREAM, CULTURED HEAVY TUB REF  
GLENVIEW FARMS  
#7635246  
NO PRICE | 2/5 LB  
Add Product Note

**4** You have successfully replaced the selected discontinued products.

# Managing discontinued products

The screenshot shows the 'Master Order List' interface. At the top, there are navigation tabs for 'MY LISTS' and 'SEARCH FOR PRODUCTS', along with the user's name 'Mary Smith' and the company 'TRAINING-US FOOD.COM (21004262)'. The main heading is 'Master Order List'. On the left, there is a filter section with a search box and checkboxes for 'Discontinued products' (checked) and 'Recently Purchased'. Below the filters is a list of product groups: 'Cooler (1) Line - 1 - 49', 'Storeroom (3) Line - 50 - 122', 'Freezer (1) Line - 123 - 143', and 'Unassigned Group (0) Line -'. An 'ADD GROUP +' button is at the bottom of the list. The main area shows a product card for '46' in the 'Cooler' group. The product is 'SOUR CREAM, CULTURED HEAVY TUB REF' by 'GLENVIEW FARMS' with ID '#7635246'. It is marked as a 'Discontinued Product' and has 'NO PRICE | 2/5 LB'. A red circle with the number '2' highlights a 'Search for Subs' button on the product card.

## Search for Subs

1. If a replacement product is not available or you don't like the replacement product, you can choose to **Search for Subs**.
2. Click on the **Search for Subs** icon.
3. The search screen will appear and will search on the first three words of the discontinued product.

# Managing discontinued products

MY LISTS SEARCH FOR PRODUCTS TRAINING-US FOOD.COM (21004262) Mary Smith

Home > Search for Products LEARN MORE

## Search for Products

BACON, PORK 18-22 SEARCH

FILTERS Lists Promotions Brand Nutritional Claims USF Storage Allergens Manufacturers Nutritional

4 17 Products found for "BACON, PORK 18-22" CLEAR ALL FILTERS

<input type="checkbox"/>	Line 1		BACON, PORK 18-22 CT LAID OUT PATUXENT FARMS #7978364
<input type="checkbox"/>	Line 2		BACON, PORK 18-22 CT LAID 1D PATUXENT FARMS #2357176
<input type="checkbox"/>	Line 3		Duplicate Product BACON, PORK 18-22 CT LAID 2D PATUXENT FARMS #4328555

5 Discontinued Product to be Replaced

BACON, PORK 18-22 COUNT LAID OUT HICKORY SMOKED RAW FROZEN 3-DIAMOND PATUXENT FARMS | #4916987 No Price | 15 LB

6 REPLACE

- The search results will display with the number of products.
- The action bar will display at the bottom of the screen with the discontinued product information.
- The Replace button will be greyed out until a replacement product is selected.
- Select a replacement product by clicking on the selection box to the left of the line number.

# Managing discontinued products

MY LISTS SEARCH FOR PRODUCTS TRAINING-US FOOD.COM (21004262) Mary Smith

Home > Search for Products LEARN MORE

## Search for Products

BACON, PORK 18-22 SEARCH

FILTERS Lists Promotions Brand Nutritional Claims USF Storage Allergens Manufacturers Nutritional

17 Products found for "BACON, PORK 18-22" CLEAR ALL FILTERS

<input type="checkbox"/>	Line 1		BACON, PORK 18-22 CT LAID OUT PATUXENT FARMS #7978364	
<input checked="" type="checkbox"/>	Line 2		BACON, PORK 18-22 CT LAID 1D PATUXENT FARMS #2357176	
<input type="checkbox"/>	Line 3		Duplicate Product BACON, PORK 18-22 CT LAID 2D PATUXENT FARMS #4328555	\$63.05 CS   15 LB

**7**

**3**

**8.** After selecting a replacement product the Replace button will be enabled

**9.** Click on the Replace button to delete the discontinued product and replace it with the selected product.

**9**

**?** Discontinued Product to be Replaced

BACON, PORK 18-22 COUNT LAID OUT HICKORY SMOKED RAW FROZEN 3-DIAMOND PATUXENT FARMS | #4916987 No Price | 15 LB REPLACE

# Managing discontinued products

MY LISTS | SEARCH FOR PRODUCTS | TRAINING-US FOOD.COM (21004262) | Mary Smith

Home > Master Order List

## Master Order List

Filter list by...

Discontinued products **11**

Recently Purchased

- Cooler (55)  
Line - 1 - 55
- Storeroom (75)  
Line - 56 - 130
- Freezer (21)  
Line - 131 - 151
- Unassigned Group (0)  
Line -

**ADD GROUP +**

**10** Successfully replaced the discontinued product.

Cooler

<input type="checkbox"/>	<input type="text" value="1"/>		MARGARINE GLENVIEW F #4307499 Note: Deli	
<input type="checkbox"/>	<input type="text" value="2"/>		MARGARINE SALTED PHO-FREE REF GLENVIEW FARMS #7316662 Add Product Note	\$65.15 CS   36/1 LB
<input type="checkbox"/>	<input type="text" value="3"/>		MARGARINE, BUTTER BLEND SOLID SALTED PHO-FREE REF GLENVIEW FARMS #6417284 Add Product Note	\$54.19 CS   30/1 LB
<input type="checkbox"/>	<input type="text" value="4"/>		SPREAD, VEGETABLE OIL WHIPPED PHO-FREE SS CUP REF SALTED GLENVIEW FARMS #7670467 Add Product Note	\$28.21 CS   900/5 GR
<input type="checkbox"/>	<input type="text" value="5"/>		MARGARINE, LIQUID TEE REF	

10. A success message will appear at the top of the screen.

11. The list will display and all products will appear without any filters.

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