MyVistar Training Guide

Section 1: Building New Orders
Section 2: Custom Order Guides
Section 3: User Accounts
Section 4: Grid Preferences
Section 5: Order History
Section 6: Invoice History
To Build a New Order:

- To Build a new order click on the [Orders] Tab.
- Ensure your hotel is selected in the [Select Ship To] drop down list.
- You will have the option to pull your list of items from various order guides under the [Select Order Guide] drop down list.
  - Top Selling Items – We’ve listed only items with documented high selling movement, so there’s no guess work for you.
  - History Only – The History Only listing will condense the item selection to only show items you have previously purchased in the past.
  - Standard Order Guide & Standard Order Guide w/no New – Please use the Standard Order Guide w/no New. This guide will show you only the items you have been approved for and will not distract you with other options. The Standard Order Guide will show your items plus will show any brand new item that Vistar adds for all their programs (Concession, Coffee, Vending, etc). However if you select one of the new item but have not been approved for it the system will not ship to you with our delivery.
  - Additionally you may create you own custom order guide with your frequent use items.
- Select your Item List option and Click [Go].
Selecting Items:

• After your list has loaded enter a PO Number into the provided field. This field is required but if you do not have a PO System for your location please enter anything into the field. Could be the date or Your name etc. You will have the opportunity to also enter your PO Number when you review your order before submission.
• To see a picture of the item and more item details please click the Item Link which is the Blue and Underlined Item Number
• You may Sort the order guide item listing by clicking on any of the column headers at their double arrow.
• Select the items for your order by entering the Quantity [QTY] you would like.
• Pack Sizes are listed in three ways see styles and descriptions in chart below.

<table>
<thead>
<tr>
<th>ITEM DESCRIPTION</th>
<th>PACK</th>
<th>SIZE</th>
<th>UOM</th>
<th>Pack Size Translation</th>
</tr>
</thead>
<tbody>
<tr>
<td>ADVIL PAIN 4 TAB/CUP</td>
<td>24</td>
<td>6 ct</td>
<td>BX or CS</td>
<td>A Case has 24 Boxes and in each Box they have a 6 count of sellable units.</td>
</tr>
<tr>
<td>BAR GRANOLA OAT &amp; HONEY</td>
<td>6/18</td>
<td>1.5 oz</td>
<td>BX or CS</td>
<td>A Case has 6 boxes and in each box they have 18 bars at 1.5oz per bar.</td>
</tr>
<tr>
<td>BUMBLE BEE TUNA SALAD/CRKR</td>
<td>12</td>
<td>3.5 oz</td>
<td>CS</td>
<td>A case has 12 units at 3.5oz each unit.</td>
</tr>
</tbody>
</table>

• Unit of Measure [UOM] Items are listed as CS for Case and BX for Box.
• Once all your items are selected click the [Review Order] button.

Selecting Items: Advanced Search

• The Advanced search capability will not work unless you have already started an order.
• In the Advanced Search tab you can search by supplier, brand, or a key word search description, like “chocolate” or “ice cream” or “Hershey”.
• Once you find what you would like to add, enter a quantity in the QTY box provided and click [Add to Order] button. It will add the items to your current pending order. Click on the review order button to see it added to the order.
• If a customer is on a bid because of a limited item selection, items that are not on the bid will not be found in an advanced search as they are not able to order them.
Review and Place Order:

- Double check your order to make sure all of your items are on the order and in the correct quantities.
- If you find a mistake or have missed an item, you can go up to the top right hand corner and click the [View/Edit] link and it will take you back to the previous order screen where you can update your order.
- The Request Ship date field may be left blank. The system will automatically default to the your next scheduled ship date, even if the wrong date is selected. However if you wish to enter a order for a future weeks delivery please indicate here and contact your assigned Distribution Center to confirm arrangements.
- The CUR AVL column will show if a product is in stock and available for delivery. Please note that if your delivery is more than 3 days into the future this field will not populate.
- Once your order is ready click the [Place Order] button. The system will now display your order number. You will receive an email order confirmation notification once the shipping center has received your order.

Pending Orders:

If you start an order and are unable to complete it we will save it for you as a pending order. You can logout and know that any unplaced order will store for your retrieval later and can be accessed once you login under the [Orders] Tab.
Section 2: Custom Order Guides

Create a Custom Order Guide:
The easiest way to create a custom order guide is to create a fake order.
• After logging in please click on the [Orders] Tab.
• Ensure your hotel is selected in the [Select Ship To] drop down list.
• Select the Order Guide you wish to build your Custom Order Guide off of from the [Select Order Guide] drop down list and click [Go].

Select Items for your Order Guide:
When the order comes up enter something in the [PO Field] to indicate that the order you are doing is a fake order. Go through and select the items you would like in your Custom Order Guide by entering a value into the Quantity [QTY] box ensuring that you change the Unit of Measure [UOM] to box option to be the type of UOM you would be ordering later on.
Save Custom Order Guide:

• Once you have selected all your items click the [Save as Order Guide] button.
• Name your Order Guide and check if you want to save the list with only the items you have entered a quantity or if you want it to save the full list of items that were available to select from the master guide.
• Click the [Save Order Guide] Button. The program will transfer you automatically to the [Order Guide] Tab to make further changes to your saved order guide if needed.
• WHEN YOU HAVE FINISHED MAKE SURE YOU GO BACK TO THE MAIN [ORDER] TAB AND [CANCEL] THE FAKE ORDER SO IT IS REMOVED AND DOES NOT SHOW PENDING.

Order Guide Tab:

• From the [Orders] Tab you can view and print all available guides. You may also access any custom order guide to modify it by sequencing it or adding and removing items from the list by clicking on its [Details] button.

Modifying a Custom Order Guide:

• Add Item: To add an item you will need to know the Vistar Item Number and its possible UOM option. For example If you wanted to add Planters Salted Peanuts under item number GEN1258 you would enter that under the provided Item Field, Enter a Quantity, and for this particular item it is only able to be entered as CS for Case.
• Delete Item: To delete an item just click the [Delete] box followed by clicking the [Save Order Guide] button.
• Sort Item List: To re-sequence the list just change its sequence number to insert it above or below where you would like it to move. For example using the information to the right, if you wished to move the Bumble Bee items between the Toothpaste and Chips, just change the bumble bee sequence numbers to 5.1 and 5.2 and click the [Save Order Guide] button. The page will reload and you will be able to see the new listing.
Section 3: User Accounts

Access Account Menu:
• After logging in please click on the [Account] Tab.
• You will have a drop down list which will allow you the following options:
  • Display Account- Where you can view a display of all your property associations.
  • Edit Account- To modify your account details and change password.
  • Maintain Sub-Users- To create, modify, or view Sub-User accounts

Display Account:
• At this screen you can quickly review your Account Information and access the lists of properties associated with your account by clicking on the [Display Associated Accounts]. Additionally you can view a quick list of any Sub Users that have been created by you.
**Edit Account:**
• This feature will allow you to modify your account details and allows you to set a new password for your account at your convenience.

**Maintain Sub-Users:**
• To Create or Modify Sub-User Accounts access the [Maintain Sub-Users] option from your [Account] Main Menu Tab.
• Once accessed MyVistar will display any accounts that have already been created for your account allowing you quick access to remove, change or access to their property account associations.
• Click the [New Sub-User] button to create a new account.

**New Sub-User: Step 1: Create New Sub-User Profile**
• Complete all required information for new Sub-User Account.
• By Checking the [Sub-user inherits Super-user Accounts] you allow the sub-user access to all your property accounts established for your master account.
• If you have multiple properties associated with your account and want to assign your new Sub-User to only one of those properties please do not check the inherit option.
• Once new user information is entered click the [Create] button.
New Sub-User: Step 2: Select Sub-User Permissions

Once you have created a new Sub-User Account you must access the profile and select the areas of MyVistar your new account will be allowed to use. Click the [Change] button to pull the profile. Once in please click the [User Permissions] button. From the available list you can choose to grant your new Sub-User any or all access to the MyVistar website. These access options can be modified at any time by you at your master account level.

- **Orders**: Allows the User access to Build and Submit New Orders. Please also ensure that Advanced Search function is also checked if giving permission for the Orders Tab.
- **Order Guides**: Allows the User access to modify or print any Custom Guides that have been created.
- **Order History**: Allows user to search and view past orders made through the MyVistar site.
- **Invoice History**: Allows user to search, view, and email invoices.
- **Reports**: Allows users to create two types of reports a Purchase History Report which lists purchases over specified date ranges and a Purchase Variance Report which compares purchases against two specified date ranges.
- **Accounts**: Allows user access to the Account Features. If any of the Sub Categories are selected please also check the main Account option as well.
- **Advanced Search**: If a user is granted access to Orders Please ensure that they are also given access to the Advanced Search Function to allow the user to search for items when placing orders.
- **Help**: Allows access to training manuals and Vistar Support Locations Contact Information

Selecting Access:

Here are two quick examples of Sub User Permission sets.
The example on the left can be used for an employee who has been granted access to make the orders but restricts them from other areas that are not necessary for that one type of function. The example to the right can be used for agents in your accounting department to be able to access invoices for billing purposes only.
Grid Preferences:

- When you select your Custom Order Guide to place an order MyVistar will automatically sort the list Alpha-Numerically by Item number column.
- If you have sorted your Custom Order Guide then you will need to modify the [Grid Preferences] so it will add to your screen the [Order guide sequence field] Column.
- At that time you can also remove any columns that are displayed such as the Suggested Quantity or [SQ] Column. Additionally you can also re-sequence the columns such as move the brand column to be between the Item and the Description columns. To do this just click the [Sequence] button provided and use the sequence method described in page 2.
- After your changes are made click the [Update Preferences] button.
- Once you set your Grid Preferences MyVistar will always mirror any order guides that you sequence.
Section 5: Order History

Order History:

• To review any order you have submitted click on the [Order History] Tab.
• Ensure your hotel is selected. You have a few search options.
• Filter by past 0-30 days, 31-60 days, 61-90 days, and 91-365 days.
• You can also search by specific order number or purchase order.
• If you wish to find more information about a particular order click the Details Tab. You will then be able to view your items/quantities/and pricing details.
• Please note that this feature will not show if an item was shipped, only that it was ordered. To view items shipped please review the Invoice.
Section 6: Invoice History

**Email Invoices:**
- If you wish to receive an official Invoice for payment just click the [Email Invoice] button to have it transmit a copy to the email address you used to log into the system.

**Invoice History:**
- To review any invoice which has been submitted to your account click on the [Invoice History] Tab.
- Ensure your hotel is selected.
- You have a few search options. Filter by past 0-30 days, 31-60 days, 61-90 days, and 91-365 days.
- You can also search by specific invoice number, order number, or purchase order identifier.
- If you wish to find more information about a particular order click the Details Tab. You will then be able to view your items/quantities/and pricing details.

### Invoice History

<table>
<thead>
<tr>
<th>ACCT #</th>
<th>CUSTOMER NAME</th>
<th>INVOICE #</th>
<th>ORDER #</th>
<th>INVOICE TOTAL</th>
<th>CUSTOMER PO #</th>
<th>INVOICE DATE</th>
<th>DUE DATE</th>
</tr>
</thead>
<tbody>
<tr>
<td>10247981</td>
<td>Beachplace Towers</td>
<td>316390648</td>
<td>39966024</td>
<td>$1,477.41</td>
<td>OSCAR</td>
<td>2011/09/07</td>
<td>2011/09/07</td>
</tr>
<tr>
<td>10247981</td>
<td>Beachplace Towers</td>
<td>31392973</td>
<td>33788335</td>
<td>$49.42</td>
<td>OSCAR</td>
<td>2011/09/07</td>
<td>2011/09/07</td>
</tr>
<tr>
<td>10247981</td>
<td>Beachplace Towers</td>
<td>31362911</td>
<td>33754567</td>
<td>$330.61</td>
<td>OSCAR</td>
<td>2011/09/07</td>
<td>2011/09/07</td>
</tr>
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<td>10247981</td>
<td>Beachplace Towers</td>
<td>31362910</td>
<td>33704613</td>
<td>$82.85</td>
<td>OSCAR</td>
<td>2011/09/07</td>
<td>2011/09/07</td>
</tr>
</tbody>
</table>

### Invoice Details

**Ship To:**
- Beachplace Towers
- Ft Lauderdale Blvd
- Fort Lauderdale 33316

<table>
<thead>
<tr>
<th>LINE #</th>
<th>ITEM ID</th>
<th>ITEM DESCRIPTION</th>
<th>UOM</th>
<th>QTY</th>
<th>UNIT PRICE</th>
<th>EXTENDED AMOUNT</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>1659120</td>
<td>Chicken Nugget</td>
<td>CB</td>
<td>1.00</td>
<td>$12.04</td>
<td>$12.04</td>
</tr>
<tr>
<td>2</td>
<td>1659120</td>
<td>Crmv Crv Sn Hld</td>
<td>CB</td>
<td>2.00</td>
<td>$14.58</td>
<td>$29.16</td>
</tr>
<tr>
<td>3</td>
<td>1659120</td>
<td>Coke Diet FET</td>
<td>CB</td>
<td>1.00</td>
<td>$25.00</td>
<td>$25.00</td>
</tr>
<tr>
<td>4</td>
<td>1659120</td>
<td>Coke Classic PET</td>
<td>CB</td>
<td>1.00</td>
<td>$25.00</td>
<td>$25.00</td>
</tr>
<tr>
<td>5</td>
<td>1659120</td>
<td>Advl 4 Tabl Cup</td>
<td>CB</td>
<td>6.00</td>
<td>$150.1700</td>
<td>$900.00</td>
</tr>
<tr>
<td>6</td>
<td>1659120</td>
<td>Bayre 24 Tabl/Cp</td>
<td>SB</td>
<td>6.00</td>
<td>$105.30</td>
<td>$631.80</td>
</tr>
<tr>
<td>7</td>
<td>1659120</td>
<td>Toothbrush Soft</td>
<td>CB</td>
<td>4.00</td>
<td>$36.05</td>
<td>$144.20</td>
</tr>
<tr>
<td>8</td>
<td>1659120</td>
<td>Toothbrush Med</td>
<td>CB</td>
<td>4.00</td>
<td>$41.40</td>
<td>$165.60</td>
</tr>
<tr>
<td>9</td>
<td>1659120</td>
<td>Crest Toothps</td>
<td>CB</td>
<td>6.00</td>
<td>$64.63</td>
<td>$387.78</td>
</tr>
</tbody>
</table>