

iTradeNetwork OrderMaestro User Guide

The OrderMaestro mobile app for MyOrders is accessible from corporate provided devices only. Users are not permitted to utilize the mobile app on their personal phones unless they are receiving a stipend from the company that covers their voice and data plans for work use.

*The OrderMaestro application has already been deployed to all Compass-managed tablet devices.

iPhone and Android users, as well as users on phones covered by a stipend plan, will need to download the OrderMaestro app from their device's app store



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Phone

Modules

Log In With Company Access Code

To log in with your company portal, enter your company access code and click submit **This will re-direct you to your organization's Single Sign-On Portal (OMS, Foodbuy Member Portal).**

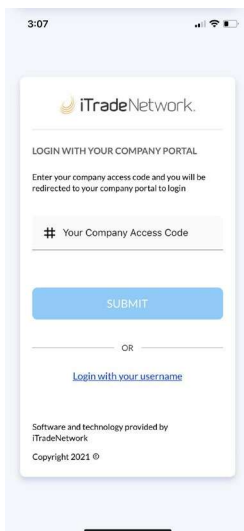
COMPANY CODE for all Compass Group sectors is **COMPASS**

Simply log into OMS or your Foodbuy Member Portal page to validate your credentials and the portal page will re-direct you into the OrderMaestro application.

Do not attempt to Log In With your Username - it will fail.

Log In With Username

1. Click login with your username .
2. On the new screen enter your username and password.
3. Tap login to be signed in.



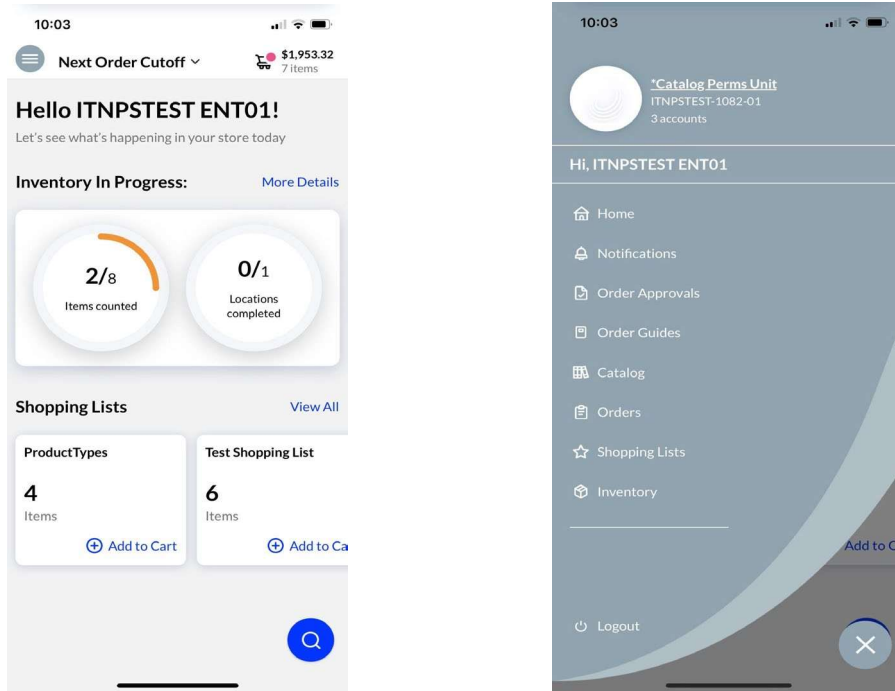
Logout

- Tap the menu icon in the top left corner of the screen.
- Tap the logout button in the bottom left corner of the pop-out menu to log out.

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Home Page

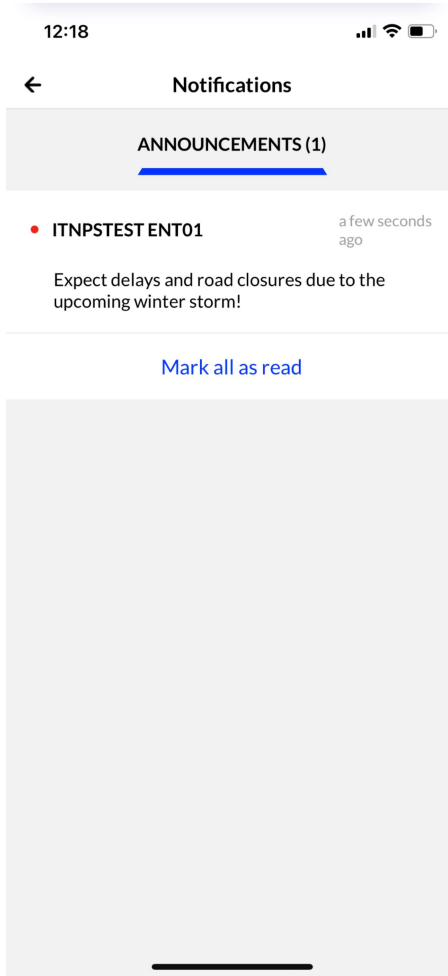
The home page is where you first land after logging in. Here you can access the main menu, view order cutoff times, review the dashboard, and see any notifications.



- **Main Menu Navigation:** When you tap the three line icon in the top left, it pops out the main menu which you can use to navigate to your desired page.
- **Order Cutoff Times:** Tap the Next Order Cutoff dropdown at the top of the screen in order to view which distributors have an upcoming order cutoff time.
- **Dashboard:** Get a quick overview of what is happening in your store, and tap the blue link next to the header to view more.

Notifications

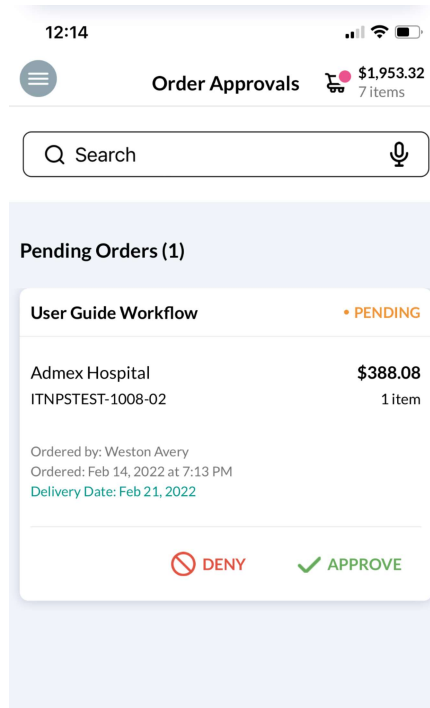
The notifications page is where you can view all of your alerts and announcements. There are two types of alerts: New order approvals (if that is within your role) and inventory reminders. Announcements function like bulletins on the desktop version and can only be viewed.



- **Read A Notification:** To read a notification, simply tap on the notifications card to expand the text. For alerts, use the action button on the bottom of the notification card to take action.
- **Mark All As Read:** Click the button at the bottom of the page in order to mark all unread messages as read.

Order Approvals

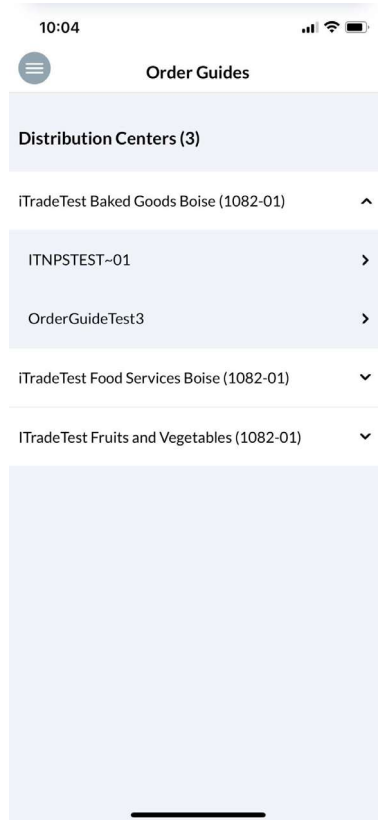
If your role involves order approvals, this is the page for you to view and take action on all pending approvals. Options for actions to take on the order are: approve, defer (if your organization has this setup), or deny.



- **View Order Details:** From the approvals page you can view pending orders details by tapping on the card. This will let you view the order details and take the appropriate action at the bottom of the screen.
- **Approve, Defer, Or Deny:** At the bottom of the pending approval card you will see the three options. Tap your desired choice and confirm.
- **Approve With Changes:** You can make changes to a pending order from the order details screen. Find the item you wish to make a change on and click ‘...’ in the top right corner of the item card. From here you can remove the item or replace it by searching for a new item.

Order Guides

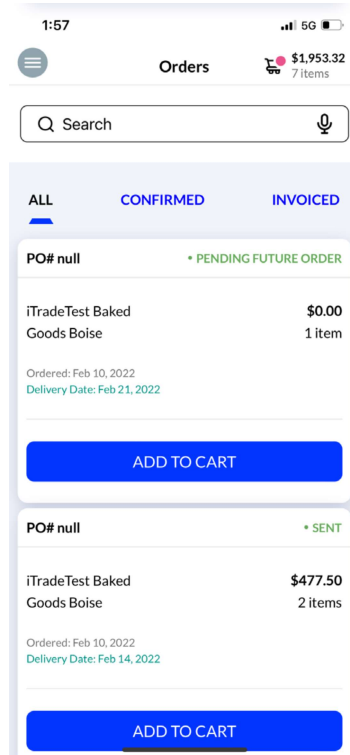
The order guides page is where you can go to view the distributors available for you to order from. You are able to navigate through each distributor's catalog to find products you wish to order.



- **Order Guide Navigation:** To the right of each distributor there is a chevron (^, >, or v) that, when clicked, lets you see each distributor's catalogs. Using the chevron again, your view will expand to see the different categories of products within the catalog.
- **Adding Items To The Cart:** Once you have navigated through the catalogs to find the item you wish to order, there will be a button at the bottom right of the item card that lets you add the item to your cart. Once you tap the add to cart button, you will be asked to enter the desired quantity then tap add to cart.

Orders

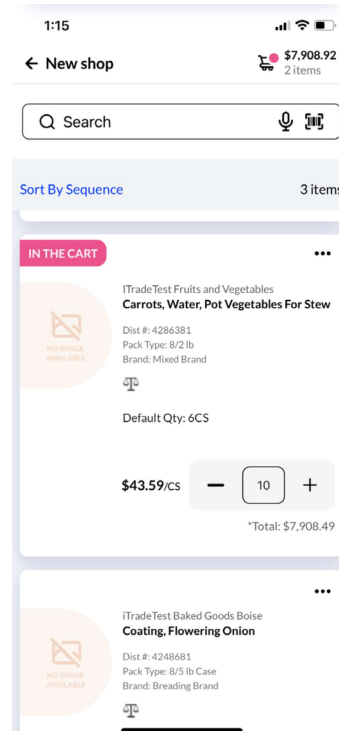
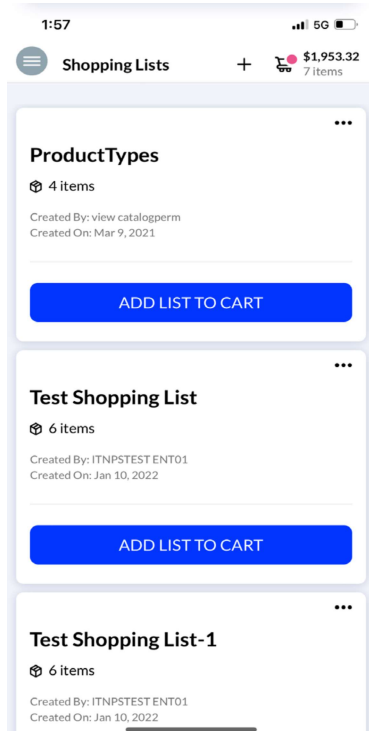
The orders page is where you can view all of your previously placed orders. This page has multiple tabs, so you can view your orders with a particular status. You can also reorder by adding your previous order to your cart from this page.



- **Reordering:** From the orders page you can click on an order card to view the order details. To reorder tap the add to cart button and proceed to checkout.

Shopping Lists

The shopping lists page is designed for convenient ordering of a list of items with set quantities and frequently ordered items. You can create new lists or add a list to your cart from this page.



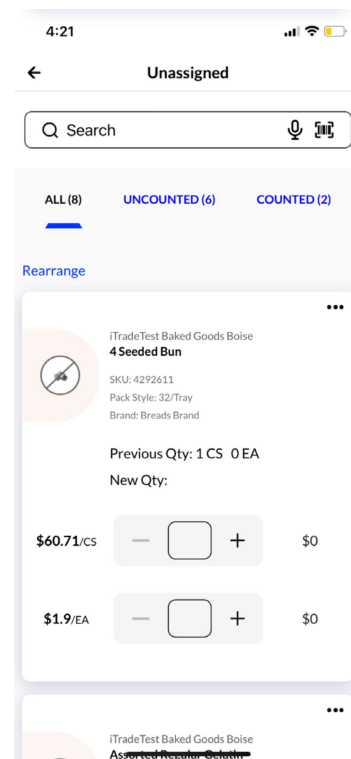
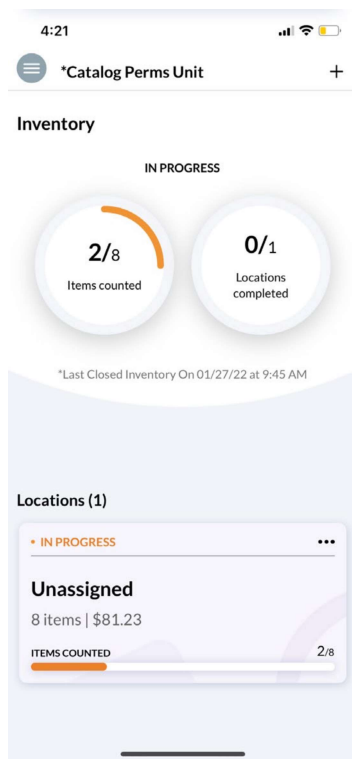
- **Creating New Shopping Lists:** To create a new shopping list, tap the + at the top of the screen. Enter a name for the shopping list, decide if you want it to be private to your account or not, and tap create. From here you can use the search function to find and add items to the list by tapping the star icon on the item card.
- **Ordering From Shopping Lists:** Shopping lists give you flexibility on how you would like to order. You can order the entire list of items with default quantities, or individual items. You can add an individual item by using the ‘...’ menu to use the default quantity, or the input field which is the cart quantity for a custom amount.
- **Shopping List Options:** Tap the ‘...’ next to the shopping list name to bring up shopping list options. This brings up a menu where you can duplicate, rename, delete, or make the shopping list private.
- **Edit Shopping List:** From the shopping list landing page you can scroll to find the list you wish to edit. Tap on the list to load the list details. From here you can scroll to find the products you wish. Here you can adjust the quantity or tap the ‘...’ where you have the option to delete the item from the list.
- **Rearrange Items:** Go to the list you wish to rearrange. Under the search bar there is a rearrange button that when tapped will put the items in rearrange mode.

On the left side of the item cards there are six gray dots. Press and hold on the dots and the card will pop out, signifying that it is ready to be moved. Drag the items in the order you desire and finish by tapping done.

- **Add Single Item From List:** You can add a single item from a shopping list to your cart by finding the item and clicking on the add to cart button on the item card.
- **Delete An Item From List:** To delete an item from the list you should find the item and click the ‘...’ and click delete. Confirm your decision to remove the item.

Inventory

The inventory page allows you to view what items you have on hand, as well as add new items to our inventory. You can also take and close inventory from the app.



- **Navigating Inventory:** Navigating the inventory is simple, just tap on the locations you wish to view.
- **Take Inventory:** Start by tapping on the take inventory button. From there you should tap into the locations and areas to access the items you are counting. You can easily enter the quantity of the item and use the back arrow to access the rest

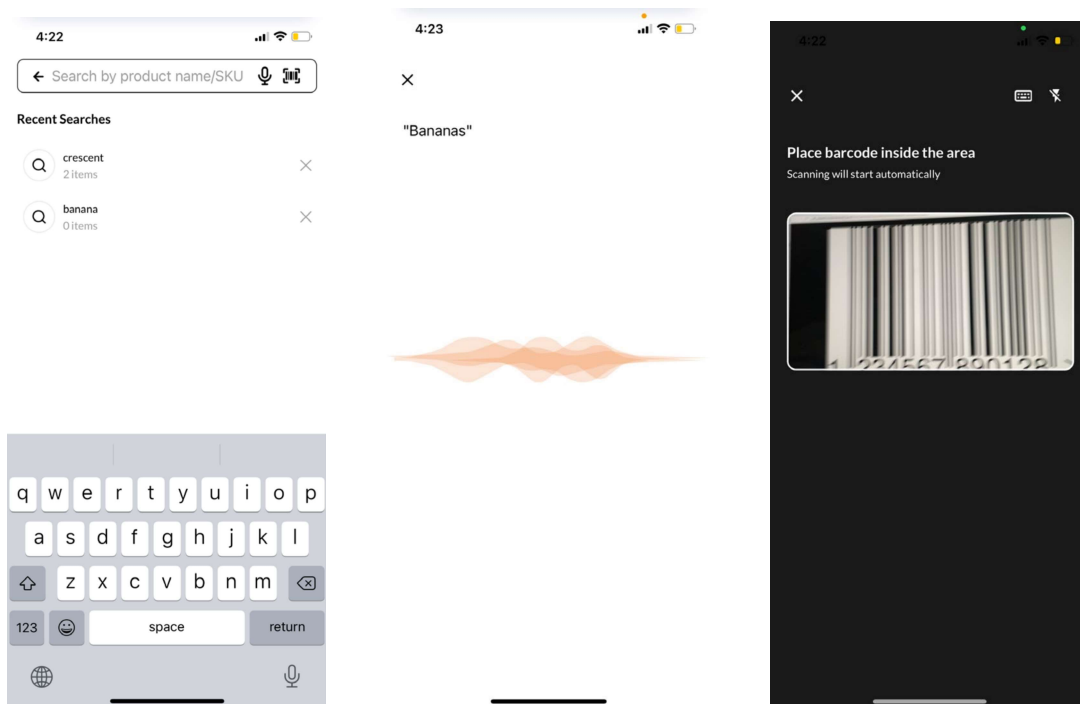
of the items. Once you have taken the inventory, go back to the inventory landing page. The take inventory button will now say close inventory.

- **Close Inventory:** Tap the close inventory button to access the close inventory confirmation page. Enter your name, the date and time, and any notes if necessary. Finally tap the close inventory button to submit.
- **Add A New Location:** Tap the + icon on the top right of the inventory landing page and tap add new location. You will be asked to name the new location and tap add. You will now have the option to add an area within the location, an unassigned item, or an off-catalog item.
- **Add A New Area Within A Location:** Tap on the location you want to add an area within, then find the + at the top right of the screen and tap it. Select add an area, enter a name and add it. You will now have the option to add a place within the area, an unassigned item, or an off-catalog item.
- **Add A New Place Within An Area:** Navigate to the location and the area within the location you wish to add a place to. find the + at the top right of the screen and tap it. Select add new place, enter a name and add it. You will now have the option to add an unassigned item, or an off-catalog item.
- **Add Unassigned Item To Location:** Navigate to the location you wish to add the unassigned item to, and tap the + icon. Tap add unassigned item and scroll the list of unassigned items or use the search function to find the item you wish to add. Select one or more unassigned items by simply tapping on the item card and finish by tapping add items.
- **Add Off-Catalog Item To Location:** Navigate to the location you wish to add the off-catalog item to, and tap the + icon. Tap add off-catalog item and enter the necessary information on the add off-catalog item page and finish by tapping add items.
- **Setting Inventory Reminders:** If you have no reminders set yet, on the inventory landing page tap the blue link where it prompts you to set the reminder. On the reminder setup page, you can click the blue links to select the next scheduled inventory date, reminder frequency, and how many days the reminder will be repeated after the inventory is closed.
- **Move Items Between Locations/Areas/Places:** Navigate to the item you wish to move, tap the ‘...’ in the corner of the item card and select move item. You can then select the location you wish to move the item to. You will need to tap move item and confirm on a pop-up to move the item.

- **Delete Items:** Navigate to the item you wish to delete, tap the ‘...’ in the corner of the item card and select delete item.
- **Rearrange Items:** Go to the location you wish to rearrange. Under the search bar there is a rearrange button that when tapped will put the items in rearrange mode. On the left side of the item cards there are six gray dots. Press and hold on the dots and the card will pop out, signifying that it is ready to be moved. Drag the items in the order you desire and finish by tapping done.
- **Delete Location:** to delete a location tap the ‘...’ next to the location name, select delete and confirm.

Search

There are three ways of using the search function: Text, voice, and barcode. You can access the search function in the bottom right of the home screen by tapping the magnifying glass icon.

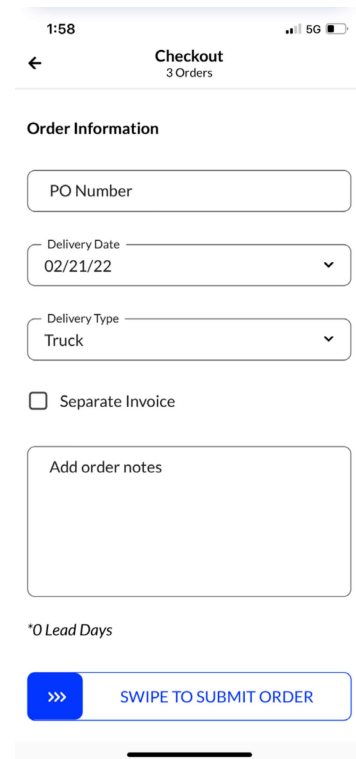
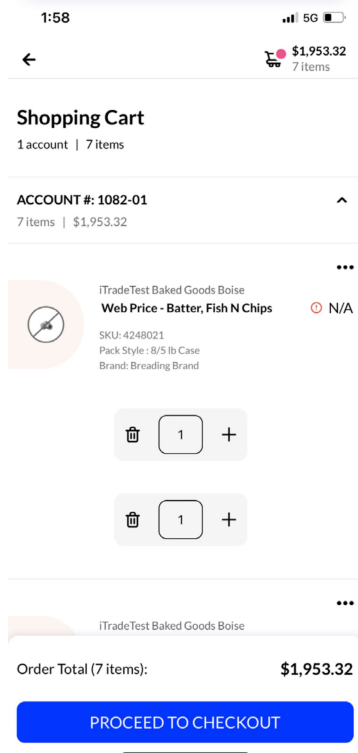


- **Text:** Tap the search icon and select the ‘T’ icon to pull up the text search page. Use the search bar to type what you are searching for. From this page you also have the option to use voice or barcode search by tapping the icons on the right side of the search bar.

- **Voice:** Tap the search icon and select the microphone icon to pull up the voice search page. You will be asked to verbalize what you are searching for. The screen will display what it hears as the search term(s) and will pull up all related products.
- **Barcode Scan:** Tap the search icon and select the barcode icon to pull up the barcode scanner. This will use your device's camera to scan the barcode within the designated box. If there is a matching barcode, then the product page will appear.
- **Barcode Manual Search:** Tap the search icon and select the barcode icon to pull up the barcode scanner. Instead of scanning the barcode, tap the keyboard icon at the top of the screen. This will pull up a page where you can enter the barcode number and tap search to pull up the desired item.

Cart & Checkout

The cart is where you can see and edit the items in your current order. You can see the cart in the very top right corner of the screen. If you have items in your cart, you will be able to see the quantity and current price of your items.



- **Navigate To Cart:** You can navigate to your cart by simply tapping on the cart icon at the top right of your screen.
- **Editing The Cart:** In your cart you will see the distributor account(s) and can view your items by tapping the chevron icon. From this view you can adjust any quantities or tap the ‘...’ by the product name to either remove the item or save it to buy at a later time.
- **Checkout:** At the bottom of the cart page you can tap the proceed to checkout button to land on the checkout page. Here you can enter a PO number in the text box for reference. Next, select a delivery date by tapping on the delivery date box, and scroll to select your delivery date from the pop-up. Finally, to place your order, swipe where prompted and hold until the order has been submitted.

Tablet

Modules

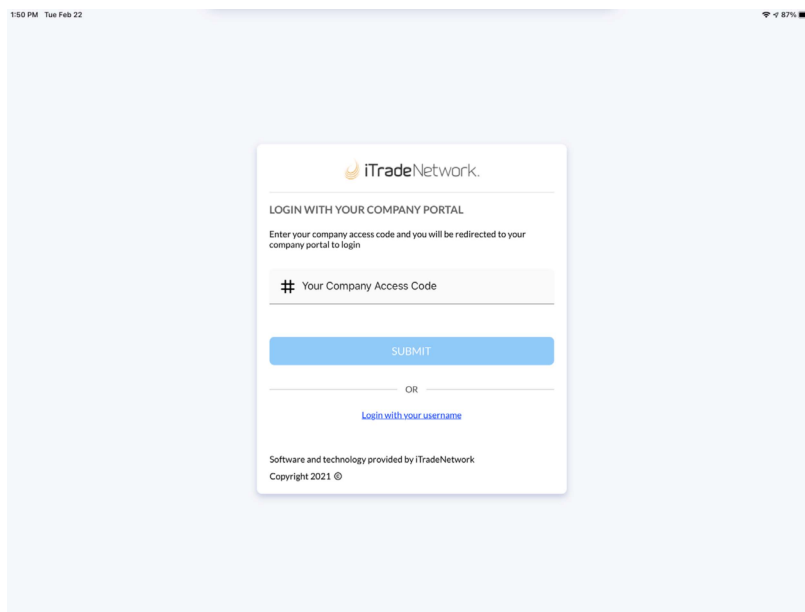
Log in With Company Access Code

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Simply log into OMS or your Foodbuy Member Portal page to validate your credentials and the portal page will re-direct you into the OrderMaestro application.

Do not attempt to Log In With your Username – it will fail.



Log Out

- Tap the menu icon in the top left corner of the screen.
- Tap the logout button in the bottom left corner of the pop-out menu to log out.
- All major tablets (Android and iOS) are now supported for all previously released phone modules (both ordering and stocktaking)

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Home Page

The home page is where you first land after logging in. Here you can access the main menu, view order cutoff times, review the dashboard, and see any notifications.

1:51 PM Tue Feb 22


**MDS Test - #ITNPSTEST-1058-02

4 accounts

\$899.89
1 item

Home

Hello, ITNPSTEST ENT01!
Let's see what's happening today



Take Next Inventory in: [More Details](#)

2
Days

*ON FEB 24, THU

Announcements

You have **1** announcements [View All](#)

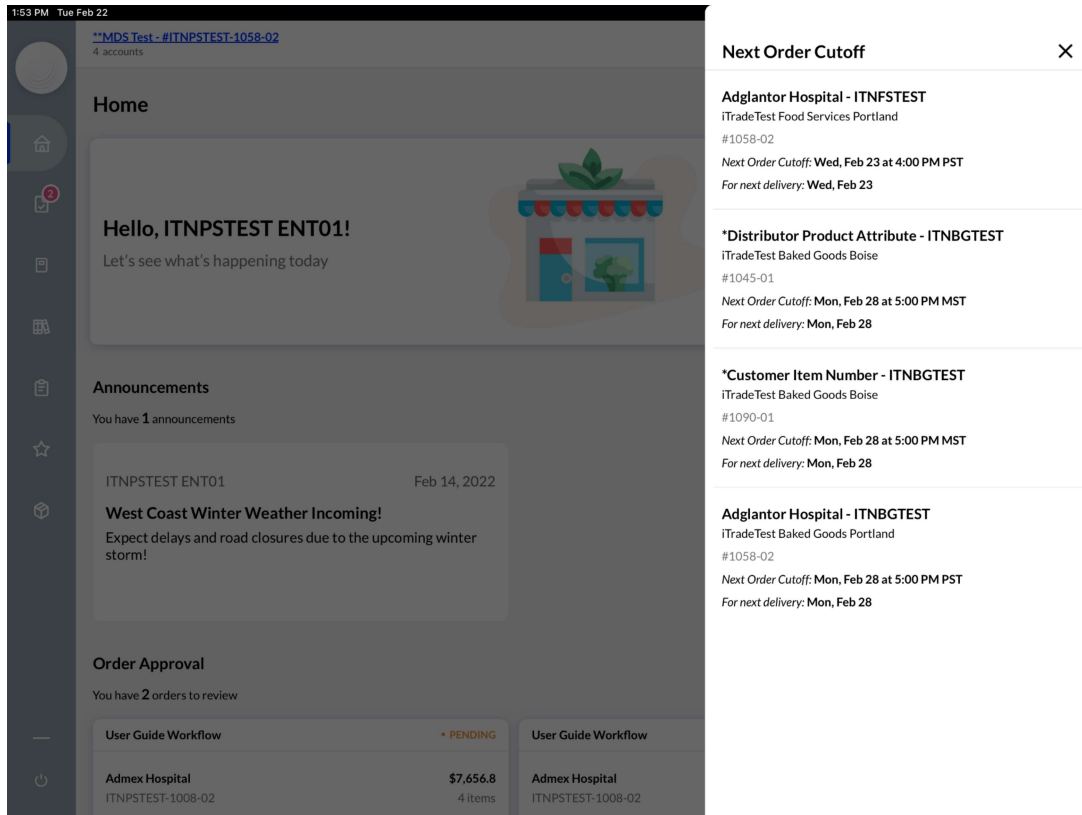
ITNPSTEST ENT01 Feb 14, 2022

West Coast Winter Weather Incoming!
Expect delays and road closures due to the upcoming winter storm!

Order Approval

You have **2** orders to review [View All](#)

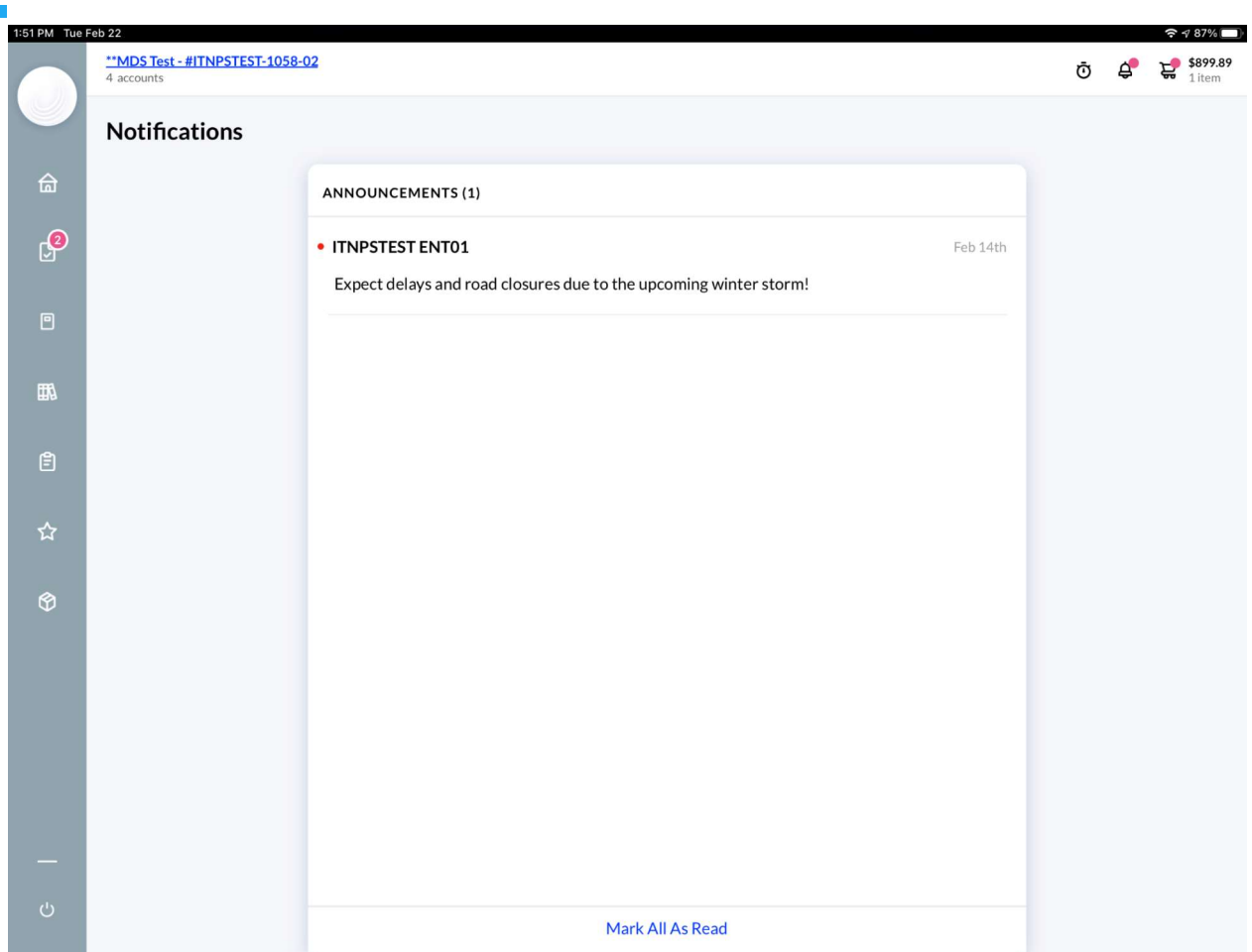
User Guide Workflow	PENDING	User Guide Workflow	PENDING
Admex Hospital ITNPSTEST-1008-02	\$388.08 1 item	Admex Hospital ITNPSTEST-1008-02	\$7,656.8 4 items



- **Main Menu Navigation:** The left side of the screen has your navigation bar that helps you move between pages.
- **Order Cutoff Times:** Tap the red clock icon at the top of the screen to view which distributors have upcoming order cutoff times.
- **Dashboard:** Get a quick overview of your announcements, orders, next time to take inventory, shopping lists, etc. Tap the blue link next to any of the headers to view more.

Notifications

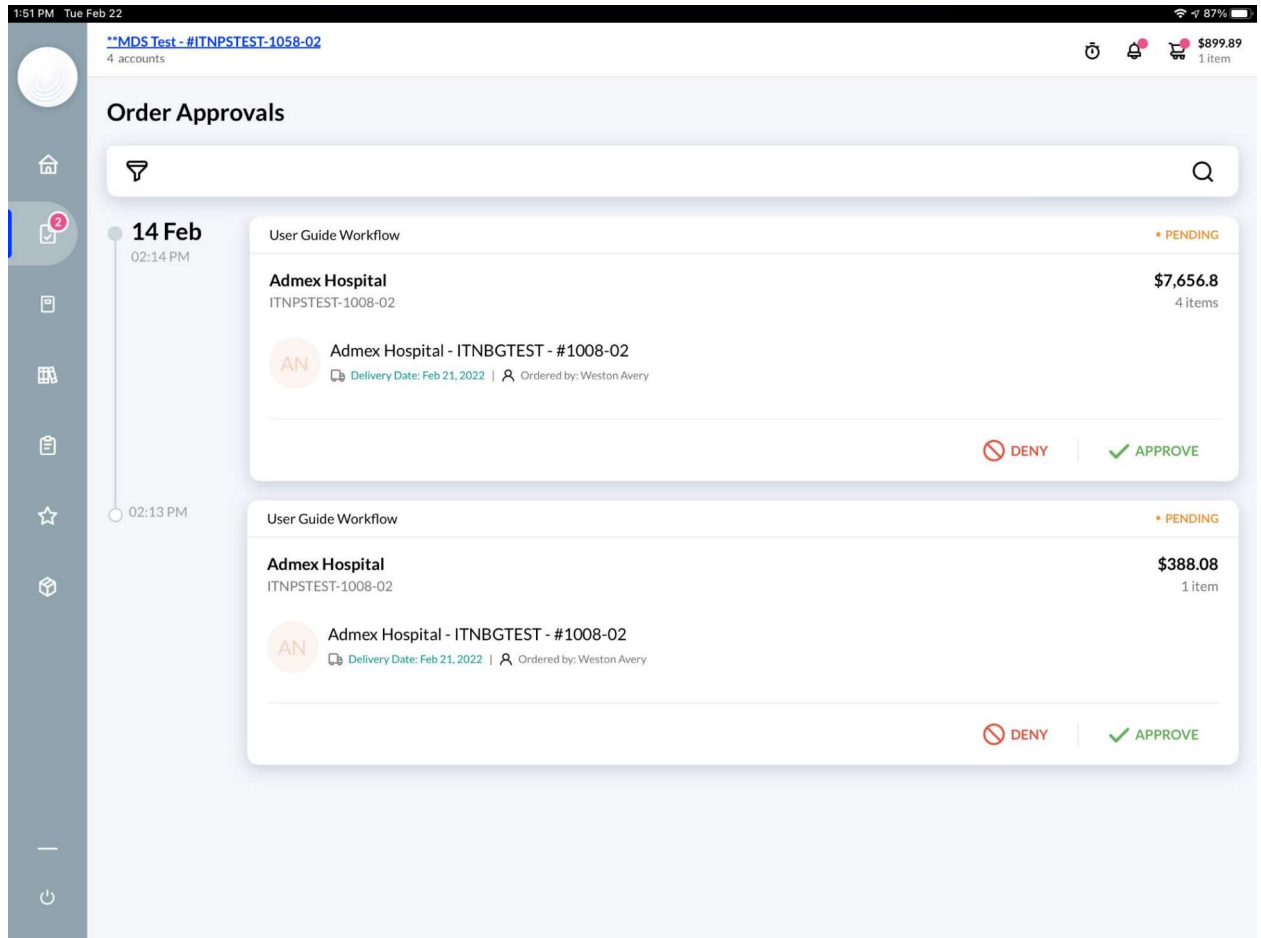
The notifications page is where you can view all of your alerts and announcements. From the home page, you can see if you have new notifications if the bell icon has a red dot on it. There are two types of alerts: New order approvals (if that is within your role) and inventory reminders. Announcements function like bulletins on the desktop version and can only be viewed.




- **Navigate To Notifications:** Tap the bell icon on the home page to access the notifications page.
- **Read A Notification:** To read a notification simply tap on the notifications card to expand the text. For alerts, use the action button on the bottom of the notification card to take action.
- **Mark All As Read:** Click the button at the bottom of the page in order to mark all unread messages as read.

Order Approvals

If your role involves order approvals, this is the page for you to view all pending approvals and approve, defer (if your organization has this setup), or deny the order.



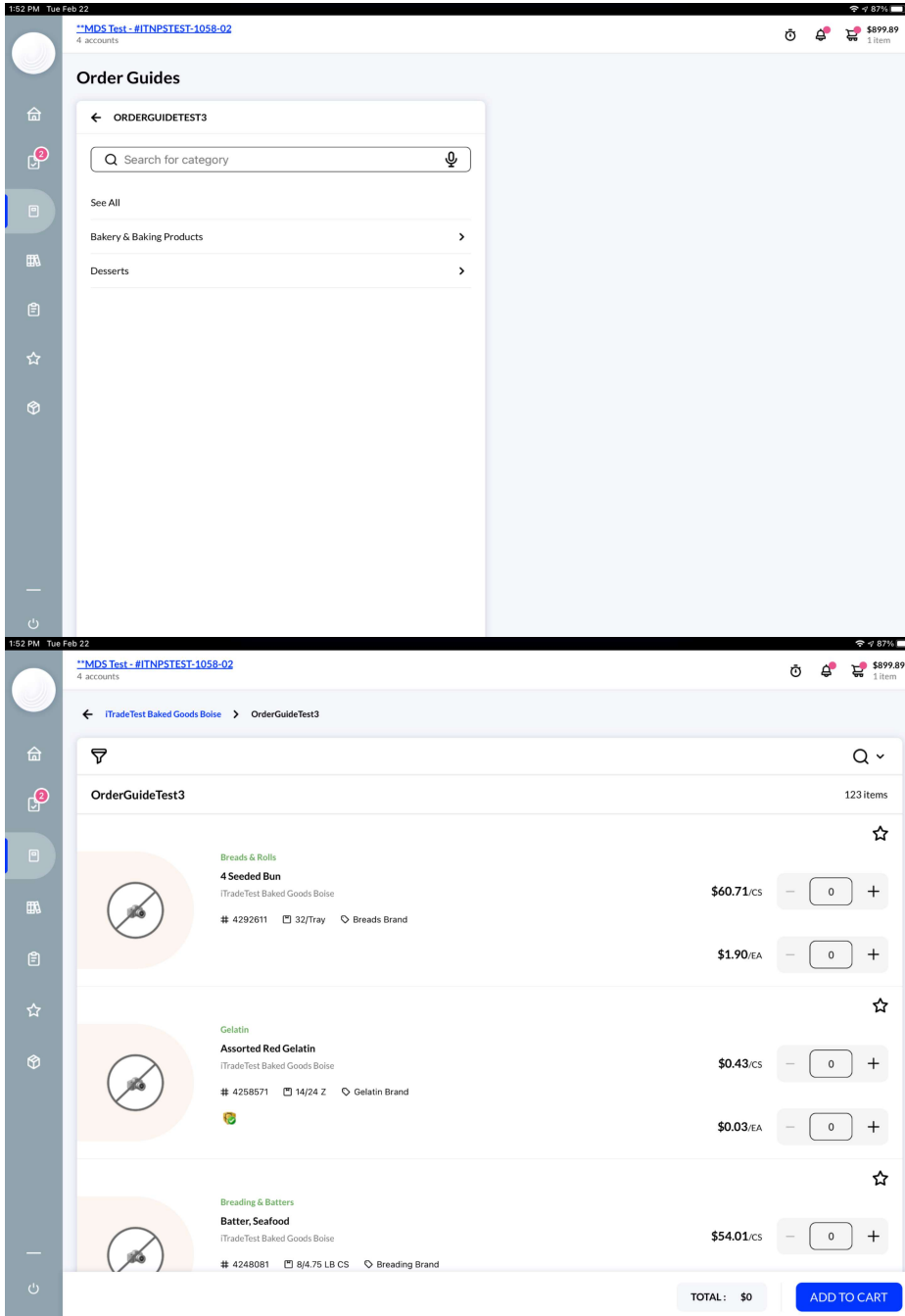
- **View Order Details:** From the approvals page you can view pending orders details by tapping on the card. This will let you view the order details, and approve, defer, or deny the order at the bottom of the screen.
- **Approve, Defer, Or Deny:** At the bottom of the pending approval card you will see the three options. Tap your desired choice and confirm.
- **Approve With Changes:** You can make changes to a pending order from the order details screen. Find the item you wish to make a change on and select either remove or replace. If you choose to remove the item, you will confirm the decision and can continue to approve the order. If you choose to replace an item, you will be taken to a new page where you can search for a new item. Once you find the item you want to select, enter the quantity you want to add and click replace. You will land on a page that shows the new item and the item you are



replacing to review your change. Tap save replacement and confirm to finalize the replacement.

Order Guides

The order guides page is where you can go to view the distributors available for you to order from. You can navigate through each distributor's catalog to find products you wish to order.



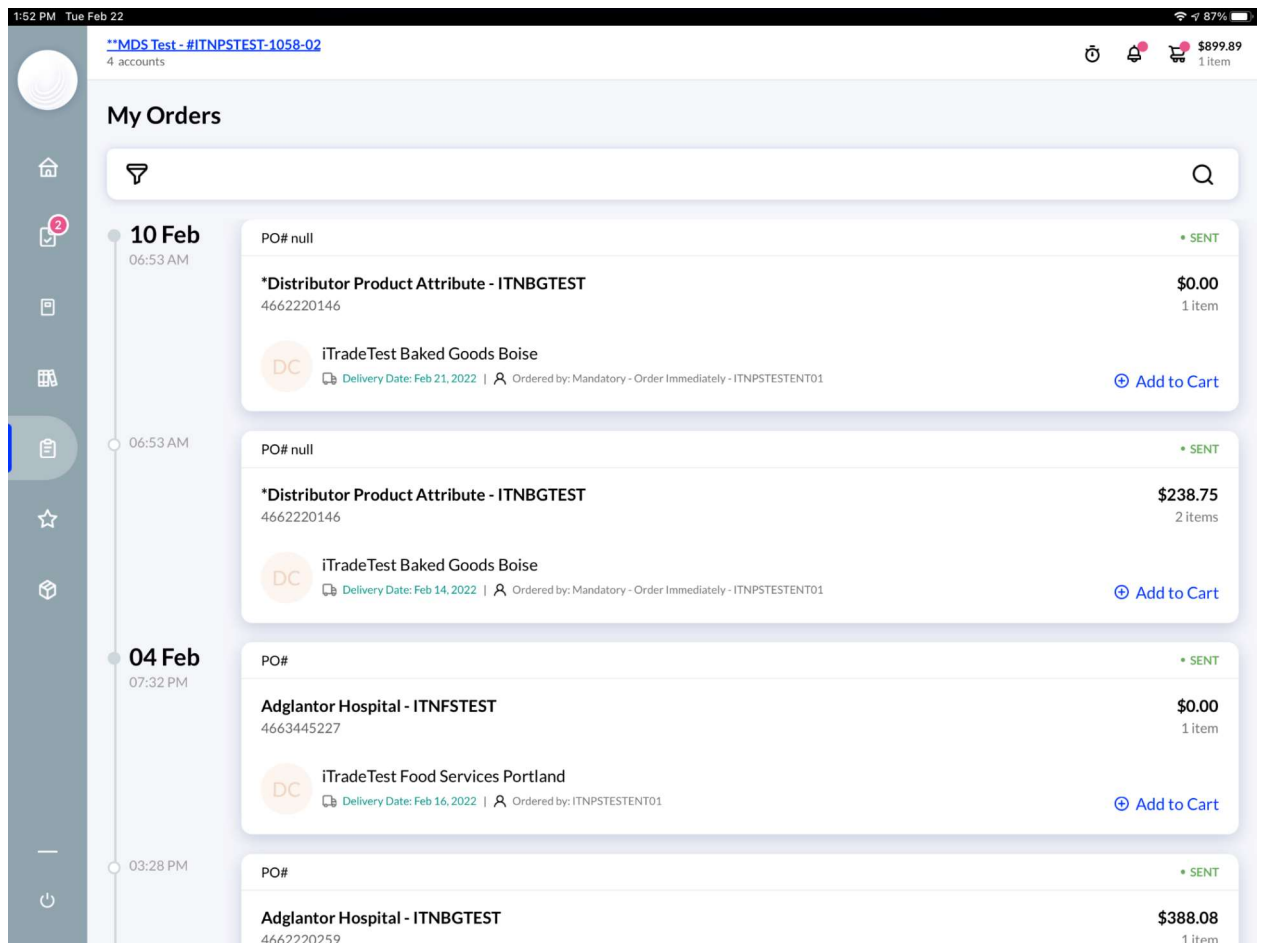
- **Order Guide Navigation:** To the right of each distributor there is a chevron that, when clicked, lets you see each distributor's catalogs. Using the chevron again, your view will expand to see the different categories of products within the catalog.

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- **Adding Items To The Cart:** Once you have navigated through the catalogs to find the item you wish to order, you can enter the quantity you wish to order on the right side of the item card. Once you have entered the quantity, the cart will automatically update.

Orders

The orders page is where you can view all of your previously placed orders. This page shows a timeline of your placed orders. You can also reorder by adding your previous order to your cart from this page.

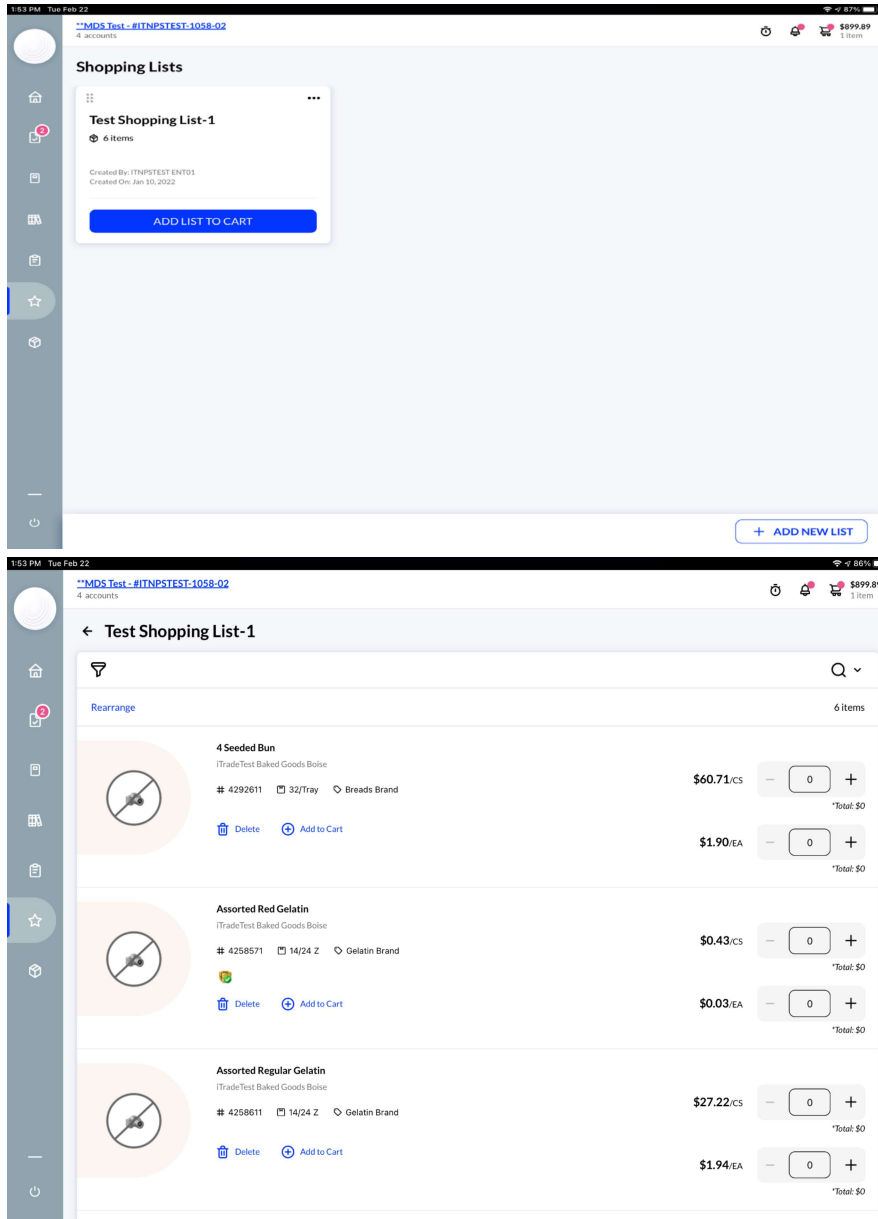


- **Reordering:** From the orders page you can add an entire order to your cart by clicking on the add to cart button on the order card. You can also click on an order card to view the order details to remind yourself what was in the order. From the order details page you can add all items to the cart with the button at the

bottom of the page, or add individual items with the add to cart button on each item card, and proceed to checkout.

Shopping Lists

The shopping lists page is designed for convenient ordering of a list of items with set quantities. The landing page lets you view your shopping lists and when you last ordered that list. You can create new lists or add a list to your cart from this page.



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- **Creating New Shopping Lists:** To create a new shopping list, tap the add new list button on the bottom right. Enter a name for the shopping list, decide if you want it to be private to your account or not, and tap create. From here you can use the search function to find and add items to the list by tapping the star icon on the item card.
- **Ordering From Shopping Lists:** Shopping lists have items with set quantities within them, so when you click add list to the cart, you will be asked to enter a quantity. This quantity is how many times you would like to add the list to your cart (i.e. your list contains 2 bananas, when you add the quantity of 2 lists, you will have 4 bananas).
- **Shopping List Options:** Tap the ‘...’ next to the shopping list name to bring up shopping list options. This brings up a menu where you can duplicate, rename, delete, or make the shopping list private.
- **Edit Shopping List:** From the shopping list landing page you can scroll to find the list you wish to edit. Tap on the list to load the list details. From here you can scroll to find the products you wish. Here you can adjust the quantity or tap the ‘...’ where you have the option to delete the item from the list.
- **Rearrange Items:** Go to the list you wish to rearrange. Under the search bar there is a rearrange button that when tapped will put the items in rearrange mode. On the left side of the item cards there are six gray dots. Press and hold on the dots and the card will pop out, signifying that it is ready to be moved. Drag the items in the order you desire and finish by tapping done.
- **Add Single Item From List:** You can add a single item from a shopping list to your cart by finding the item and clicking on the add to cart button on the item card.
- **Delete An Item From List:** To delete an item from the list you should find the item and click the delete button. Confirm your decision to remove the item.

Inventory

The Inventory page allows you to track and monitor the products in your inventory. This page has four options: Take Inventory, Inventory Report, Manage Inventory, Off Catalog Items, and Valuation Report.

1:52 PM Tue Feb 22 MDS Test - #ITNPSTEST-1058-02 4 accounts \$899.89 1 item

Inventory

Last closed inventory on Dec 10, 2021 at 7:41 PM

Search locations

ALL LOCATIONS 7 items | \$0

UNASSIGNED 7 items | \$0

Unassigned

ALL (7) UNCOUNTED (7) COUNTED (0)

SEQUENCE	DESCRIPTION	UOM	PRICE	LAST INV QTY	TOTAL PRICE
1	Apple Crescents, Fryer Saver Batte...	CS	\$0.25	20	\$5
2	Coating, Flowering Onion	CS	\$47.31		\$0
3	Mix, No-Bake Bar	CS	\$7.13	10	\$71.3
4	Pie Filling, Apple	CS EA	\$13.83 \$1.73		\$0 \$0
5	Pineapple Pie Filling	CS EA	\$33.92 \$4.24		\$0 \$0
6	Web Price - Ketchup, Poly	CS EA	\$0 \$0		\$0 \$0
7	Web Price - Mix, Muffin, Apples N...	CS EA	\$0 \$0		\$0 \$0

INVENTORY REMINDER + Add New TAKE INVENTORY

1:52 PM Tue Feb 22 MDS Test - #ITNPSTEST-1058-02 4 accounts \$899.89 1 item

Inventory

Last closed inventory on Dec 10, 2021 at 7:41 PM

Search locations

ALL LOCATIONS 7 items | \$0

UNASSIGNED 7 items | \$0

ITEMS COUNTED 0/7


Unassigned

ALL (7) UNCOUNTED (7) COUNTED (0)

SEQ	DESCRIPTION	BRAND	PRICE	UOM	INV COUNT
1	Apple Crescents, Fryer Saver Batte...	Appetizers Brand	\$0.25	CS	<input type="text"/>
2	Coating, Flowering Onion	Breading Brand	\$47.31	CS	<input type="text"/>
3	Mix, No-Bake Bar	Baking Brand	\$7.13	CS	<input type="text"/>
4	Pie Filling, Apple	Fillings Brand	\$13.83 \$1.73	CS EA	<input type="text"/> <input type="text"/>
5	Pineapple Pie Filling	Fillings Brand	\$33.92 \$4.24	CS EA	<input type="text"/> <input type="text"/>
6	Web Price - Ketchup, Poly	Condiments-Portion Brand	\$0 \$0	CS EA	<input type="text"/> <input type="text"/>
7	Web Price - Mix, Muffin, Apples N...	Muffins Brand	\$0 \$0	CS EA	<input type="text"/> <input type="text"/>

INVENTORY PROGRESS + Add New CLOSE INVENTORY

- **Navigating Inventory:** From the landing page you can see your locations on the left side of the screen. Simply tap on a location to view its areas, and tap the areas to view places. Tap the place name to view the items in that place.
- **Take Inventory:** Start by tapping on the take inventory button. From there you should tap into the locations and areas to access the items you are counting. You can easily enter the quantity of the item and use the back arrow to access the rest of the items.
- **Close Inventory:** Once you start taking inventory, the take inventory button will have turned into a close inventory button. Tap the close inventory button to access the close inventory confirmation page. Enter your name, the date and time, and any notes if necessary. Finally tap the close inventory button to submit.
- **Move Items Between Locations/Areas/Places:** To move items to a new location, select the items by clicking on the check box on the left side of the product line. Select the move button and on the pop-up, select the quantity you wish to move and finalize by clicking the move button.
- **Add A New Location:** Tap the add new button on the top right of the inventory landing page and then tap add new location. You will be asked to name the new location and tap add. You will now have the option to add an area within the location, an unassigned item, or an off-catalog item.
- **Add A New Area Within A Location:** Tap on the location you want to add an area within, then find the add new button at the top right of the screen and tap it. Select add an area, enter a name, and add it. You will now have the option to add a place within the area, an unassigned item, or an off-catalog item.
- **Add A New Place Within An Area:** Navigate to the location and the area within the location you wish to add a place to. Find the add new button at the top right of the screen and tap it. Select add new place, enter a name, and add it. You will now have the option to add an unassigned item, or an off-catalog item.
- **Add Unassigned Item To Location:** Navigate to the location you wish to add the unassigned item to, and tap the add new button. Tap add unassigned item and scroll the list of unassigned items or use the search function to find the item you wish to add. Select one or more unassigned items by tapping on the check box on the left side of the item line and finish by tapping add items.
- **Add Off-Catalog Item To Location:** Navigate to the location you wish to add the off-catalog item to, and tap the add new button. Tap add off-catalog item and

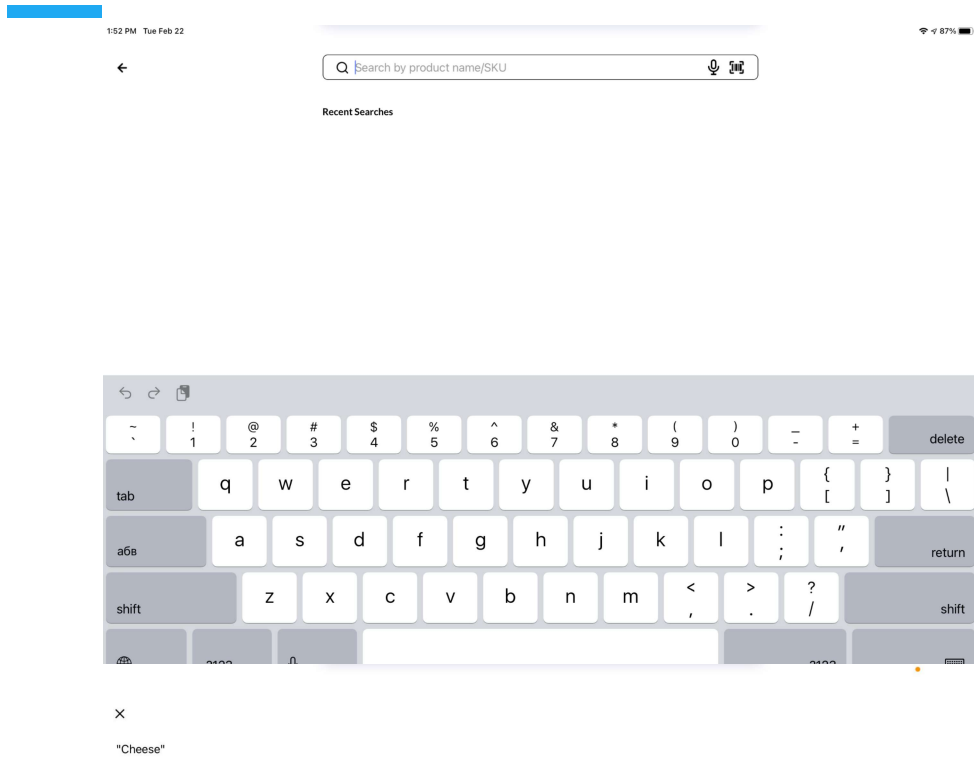


enter the necessary information on the add off-catalog item page and finish by tapping add items.

- **Setting Inventory Reminders:** If you have no reminders set yet, on the inventory landing page tap the blue link where it prompts you to set the reminder. On the reminder setup page you can click the blue links to select the next scheduled inventory date, reminder frequency, and how many days the reminder will be repeated after the inventory is closed.
- **Delete Items:** Navigate to the location you wish to delete items from and select the items by tapping the check box on the left of the item line. Once you have selected the items you wish to delete, tap the delete button and confirm to delete the items.
- **Rearrange Items:** Go to the location you wish to rearrange. On the left side of the item cards there are six gray dots. Press and hold on the dots and the card will pop out, signifying that it is ready to be moved. Drag the items in the order you desire and finish by tapping done.
- **Delete Location:** To delete a location tap the ‘...’ next to the location name, select delete, and confirm.

Search

There are three ways of using the search function: Text, voice, and barcode. You can access the search function in the bottom right of the home screen by tapping the magnifying glass icon.

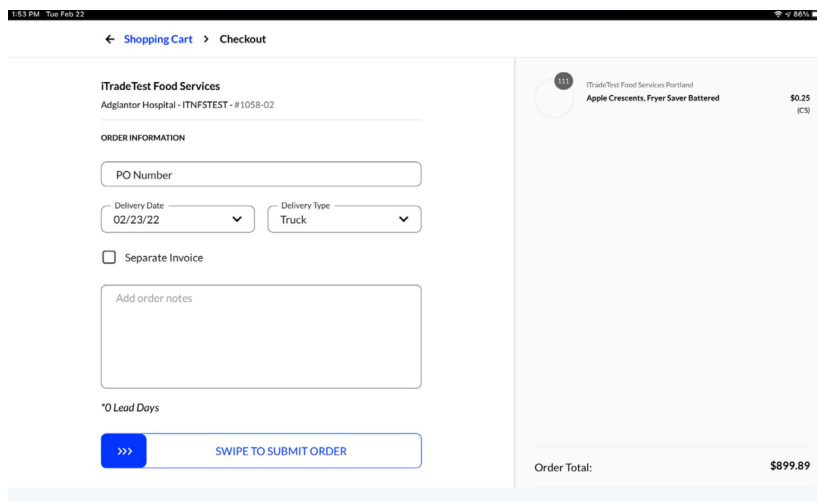


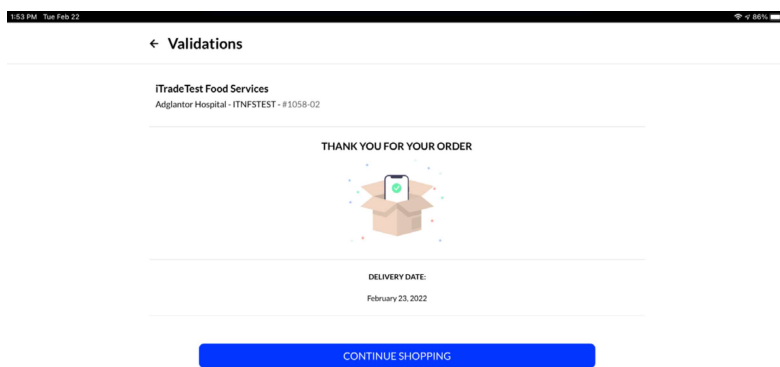
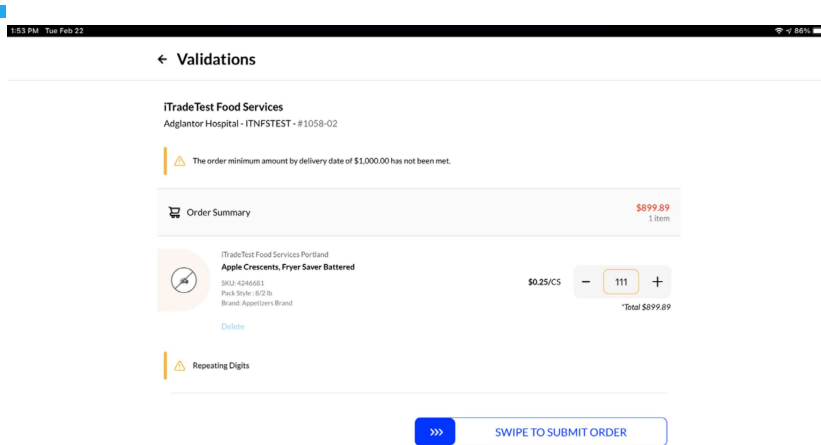
- **Text:** Tap the search icon and select the 'T' icon to pull up the text search page. Use the search bar to type what you are searching for. From this page you also have the option to use voice or barcode search by tapping the icons on the right side of the search bar.

- **Voice:** Tap the search icon and select the microphone icon to pull up the voice search page. You will be asked to verbalize what you are searching for. The screen will display what it hears as the search term(s), and will pull up all related products.
- **Barcode Scan:** Tap the search icon and select the barcode icon to pull up the barcode scanner, which using your device's camera can scan the barcode within the designated box. If there is a matching barcode, then the product page will appear.
- **Barcode Manual Search:** Tap the search icon and select the barcode icon to pull up the barcode scanner, but instead of scanning the barcode, tap the keyboard icon at the top of the screen. This will pull up a page where you can enter the barcode number and tap search to pull up the desired item.


Cart & Checkout

The cart is where you can see and edit the items in your current order. You can see the cart in the very top right corner of the screen. If you have items in your cart, you will be able to see the quantity and current price of your items.





- **Navigate To Cart:** You can navigate to your cart by simply tapping on the cart icon at the top right of your screen. If you have just added an item to your cart you will have a pop-up that will allow you to navigate directly to checkout.
- **Editing The Cart:** In your cart you will see the distributor account(s), and can view your items by tapping the chevron. From this view you can adjust any quantities, tap the remove button to remove the item, or tap save it for later to buy at a later time.
- **Checkout:** On the left of the cart page you can tap the proceed to checkout button to land on the checkout page. Here you can enter a PO number in the text box for reference. Next, select a delivery date by tapping on the delivery date



box, and scroll to select your delivery date from the pop-up. Finally, to place your order, swipe where prompted and hold until the order has been submitted.