Welcome to the Charlie’s Produce Online Order User Guide

This user guide is designed to provide documentation for people who will be ordering from Charlie’s Produce and would like to do so online using their browser or mobile device.

To start ordering from Charlie’s Produce, please contact us and a Sales Representative would be happy to assist! And if you are not yet ordering online, ask us about getting started!

Sprouting from the enthusiasm and commitment of our founders, Charlie’s Produce is constantly searching for ways to improve industry processes and services on behalf of our partner’s and consumers. At Charlie’s, we are on a perpetual quest to discover new methods, to be on the cutting edge of technology and to set and follow new trends.

Is EDI an option supported by your organization? Please share our interest with the relevant parties in your IT team and have them reply back with your request for EDI guide, order, and/or invoice integration.

Is Punch-out something your procurement vendor supports? Please share our request with the relevant parties and we will work with our shared service provider to setup Charlie’s produce as a supplier in your marketplace.

Are you ready to order online from Charlie’s Produce? Our Getting Started guide will walk you through searching your catalog for products, adding items to your cart, and submitting your order for fulfillment! It’s as easy as 1, 2, 3! And if you are interested in more control over your guides, orders, and invoices, read on and see how Charlie’s is partnering with you to meet you and your business where you are at!
Getting Started

Log in at
orders.charliesproduce.com

Select Order icon to view current orders
Select Item icon to view products & start new order
Select New icon to create a new order
To continue an order select the continue button

To add items to order, enter the Order/Case Quantity in the quantity field

Once all items have been added to an order, select the Process Order icon to proceed

Review details of the order and select Submit Order
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How to Login

1. Navigate to Online Order for Charlie’s Produce Order.CharliesProduce.com
   
   a. Use your browser on any device
      
   OR

   b. Use the app on your cell phone or tablet

   TIP: Select the (?) icon to navigate to Charlie’s Produce website for more information about contacting support

2. Enter Your Username & Password
3. Select the Login button

4. The Dashboard is shown

   TIP: Use mouse to slide promotional images left or right
How to Create an Order

To create a New order for a Customer

1. Navigate to Order

2. Select New

3. Select Order Type - New Order

4. Select Okay button

5. A list of items to add to the selected order are shown

TIP: To view additional details for an item, select the item and an expanded Detail pane will display
How to add items to your order

To add items to an order
1. Enter the quantity of items in the field next to the Price
   
<table>
<thead>
<tr>
<th>Price</th>
<th>Quantity</th>
</tr>
</thead>
<tbody>
<tr>
<td>$50.90</td>
<td>5</td>
</tr>
</tbody>
</table>

   a. In the search results list
   OR
   b. In the details pane

**TIP: To add items to an order,**
- Use the popup key pad to enter quantity of items
- Type the amount to order in the field next to the price.
- Use your 10 key pad to do this by navigating to the next item in list with the Enter key
- Quickly add quantity of an item by tying the item number followed by a space and the quantity

To view items in your order
2. Select Current Order to filter items in the search results list
   
   Current Order

   OR

3. Select Process Order to view list of items in the order Details pane

   > Process ...
1. Select the Item icon
2. The Items module is shown

3. To view items on your Charlie’s order guide:
   a. Select Standard Guide from the List By navigation section
   b. In the popup, select to view all items on your order guide OR only those in a selected category
   c. Select apply

4. Items you can add to your order are shown in the search results list

**TIP:** As a customer, you can add your favorite items to your custom order guides – select the Custom Guide tool in Settings and follow instructions for how
How to continue adding items to an order before it is submitted

To search for items to add to an order
1. Select Order icon/button
2. Select Continue Order for order to add items to

3. Search for items by item number
4. Search for items by keyword
   a. In item title/description
   b. In brand

*TIP: If the Current Order filter is checked, search results will only include items already added to order. To clear filter and search all items, select the X*
How to Review & Submit your Order

To review and submit an order
1. Select Order icon/button
2. Select Process Order for order to submit

To review items, total, quantity
3. The process order pane is shown
   a. Review items, total, quantity
   b. Review Shipping Info (includes address and route information)
   c. Enter Additional Data (includes Separate Invoice option and PO#)
   d. Select Ship Date

4. Select Submit Order

5. Order is submitted to Charlie's for processing
How to view orders not yet shipped

1. Login
2. Select Orders icon/menu

3. Open orders created online are shown by default

4. To view open orders create on your behalf by Charlie’s sales:
   - Select order type
   - Select host orders
How to view Invoices

1. Login
2. Select Invoice icon/menu

3. All invoices for the selected account are shown
How to Print your Order Guide

1. Login and select the report module

2. Select report type and apply

3. If you have more than one custom guide: select custom guide report and select guide in popup

4. Once report type, guide, and customer are shown; select the Generate button
5. Preview of report will be shown

6. To print report, select the printer icon

7. Choose type of print report, PDF or Spread Sheet, and okay

8. Once your report is ready, select view

How to Email your order guide

1. Once report type, guide, and customer are shown; select the Generate button

2. To email report, enter one email address, and select the arrow icon

3. Select PDF or XLS Format

Please select one option.

- Email as PDF
- Email as Spreadsheet
How to Print your confirmed Order

1. Login and select the order module
2. Select to view details of a confirmed order
3. To print report, select the printer icon
4. Save order report PDF
How to Print your Invoice

1. Login and select the invoice module  
2. Select to view details of an invoice or credit

3. To print report, select the printer icon

4. Save order report PDF to view
How to view orders and invoices for multiple accounts

1. Select the Customer icon
2. The Customer Module is shown

   \textit{TIP: Select a customer in the search results list to view additional details like shipping address or notification email.}

3. To select default account for items, orders, and invoices: select the Head icon
4. The name of the selected account will change underneath the Customers label in the header
How to Log Out

1. Select the [->] Icon on the left side to logout of power mobile.