

## **United Natural Foods Inc. (UNFI) Web Ordering System (WOS)**

### **Background**

For the past several years, the coop has been using software called FoodLink to handle most of our orders. FoodLink is a stand-alone program that the customer installs on his own computer. It uses email and bulk file transfers to communicate with the supplier. The program was developed for Northeast Coops, which used to be our main supplier. Even when Northeast was absorbed by Blooming Prairie, and then Blooming Prairie by UNFI, we continued using FoodLink. Now UNFI has developed an entirely web-based online ordering system to replace FoodLink. Since UNFI has not given the system a distinctive name, we are calling it simply WOS (Web Ordering System).

### **Getting Started with WOS**

To use WOS, you must have a web user account. You can request an account from the coop's UNFI Batcher, Susan Kataja, by sending her an email at [bfc\\_unfi@yahoo.com](mailto:bfc_unfi@yahoo.com).

Once Susan has arranged for UNFI to set up your account, you will receive an automatic email confirmation from [CustServ@unfi.com](mailto:CustServ@unfi.com) titled "Your New UNFI Web User Account". This email will contain your login username and password and a link to the WOS address on the web.

If you have not received this email within a few days of your request, check your trash/junk email folder -- in case your spam filters have mistakenly weeded it out. If you still can't find the email, contact Susan, and she will send you the information manually.

Note that your password will initially be set to something fairly obvious. If you would like to have a more "private" password, you can change it yourself after your first login to the system.

### **Online Ordering**

Most of the information you need for placing a UNFI order online is in the UNFI quick start document titled "Web Ordering for Buying Clubs" (BC\_WebOrdering\_Member.pdf), which can be downloaded from the "Frequently Asked Questions" page at <http://www.unfi.com/er/public/FAQ.aspx>. This document may not contain information on all the features available, but it should provide enough to get you started. The FAQ itself also has useful information, especially about such administrative matters as changing your password or recovering from a forgotten password.

WOS provides three ways to build your order:

- Quick Entries enables you to enter as many as 30 items right away, and by clicking on the "Add More" button, you can expand the entry table to as many as 120 items in increments of 30. Use this feature if you know exactly what items you want and can provide the product codes without having to know the descriptions. You have to be careful entering the codes, though, because there's no immediate feedback whether a code is correct as entered. (For this reason, you may want to refer to a hardcopy UNFI catalog while you're building your order.) Also, be sure to click the "Add to Basket" button every few minutes. Quick Entries has a 15 minute timeout, and the system saves only what you actually put into your basket. That means if you fill up the Quick Entries table with codes, but don't click on "Add to Basket" within 15 minutes, you'll lose what you've entered into the table.

- View Baskets is a much slower way to build your order because you can enter only one item at a time. But as soon as you enter the product code, the system displays the description and price that goes with it, so you have immediate feedback about what you're ordering. Also, since you're entering the items directly into your basket, you don't have to worry about losing anything to a timeout. You still have to know the product code for what you want, though, so it's helpful to have a UNFI catalog handy.
- Product Search is the slowest way to build your order because you're not just entering what you want; you're also looking for it. But Product Search also provides product information, including ingredients, so you may not need a UNFI catalog at all. Product Search actually has two modes: Filtered Search and Browse. The Filtered Search allows you to set search criteria so you can narrow down what you're looking for, and you can do either a simple search on one keyword or an advanced search on various combinations of words. Browse provides various categories to help narrow down the search, but you may have to walk through several lists to find what you want. Once you find what you want, you simply click on the product code, enter quantity information, and then click on "Add to Basket". Again, there's no need to worry about losing anything to a timeout.

If you've ordered previously, and especially if you tend to order many of the same items every month, you can also build your order fairly quickly by copying codes from a previous invoice and pasting them into the Quick Entries table. WOS saves all your previous invoices and makes them available to you online. You might think it's faster just to enter the code than copy and paste it, but copy/paste avoids typos that can put wrong items on your order.

### Order Timing

Here is an example of order cycle timing:

Order Timing Announcement:		Sat. May 24th	17 days before Distribution
Initial Order Deadline:	6PM	Wed. May 28th	13 days before Distribution
Unfilled Cases Deadline:	9PM	Sun. June 1st	9 days before Distribution
Distribution:		Tue. June 10th	

About 17 days before distribution, Susan contacts BFC members by email to let them know they can start building their orders. Actually, they can start building their orders at any time, so the email serves mostly as an announcement/reminder about the timing of the upcoming distribution. Susan also attaches an Excel document titled "Extra Specials" that lists the special discounts that UNFI is offering to BFC in the current order cycle. These discounts override any prices shown in View Baskets, even the monthly specials that are available to all coops.

The deadline for completing your initial order is 6PM on the Wednesday 13 days before the Tuesday distribution. Note, however, that there is no "Commit" function in WOS -- i.e. no way for you to tell the system that your order is ready or complete. In effect, your "committed" order consists of whatever is in your basket as of the deadline. For this reason, you need to be careful about what you do or don't put into your basket, especially as the deadline approaches. Otherwise, you may end up ordering items you don't want or missing items you intended to order.

If you do miss out on certain items you meant to order, you have a second chance, although it is more limited. The Unfilled Cases Deadline is 9PM on the following Sunday, which is 9 days before Distribution. The purpose of this deadline is to allow members to adjust their orders to complete cases that were partially ordered by other members. For example, in order to buy a certain cereal, the coop must order a case of 12 boxes from UNFI. If Mary orders 4 boxes and George orders 5, the case is "unfilled" because it takes 3 more boxes to fill the case. Even though Francis did not order the cereal by the Initial Deadline, she has until the Unfilled Cases Deadline to order the remaining 3 boxes and "fill the case". She also has until that deadline to order an entire case on her own (i.e. all 12 boxes). But she cannot wait until that deadline to place a partial order for a new item -- i.e. one that no other member has ordered -- because that would introduce a new unfilled case into the mix.

## Unfilled Cases Strategy

Shortly after the Initial Deadline (typically the day after), Susan will send out an email listing the members who have entered orders into WOS. Attached to that email will be an Unfilled Cases Report listing all the items that were ordered but fell short of filling their cases. This report is for informational purposes only.

Because the online system integrates all member orders, you will be able to view Unfilled Cases information at any time during the ordering cycle, even before the Initial Order Deadline. To view and order from Unfilled Cases, simply click on the Basket field (which normally displays "My Order"), then pull down to and select "Splitting Cases". The system will then display an online version of the Unfilled Cases Report. You can see how much of each item was ordered by other members, and if you want to add the item to your order, simply click on the product code and specify quantity. You can also change quantities, but only for items in your own order.

**Very Important:** Under no circumstances should you make any changes to your order after the Unfilled Cases Deadline. At that point Susan will be finalizing the order to send to UNFI, and any conflicting user changes could cause the entire order to reject. If you find that you need additional changes past that deadline, contact Susan to see if such changes are possible.

## FoodLink

Although WOS has replaced FoodLink, you may want to keep the FoodLink program on your computer until UNFI discontinues support for it altogether. FoodLink has some features which WOS does not yet have, notably:

- FoodLink retains the results of a search and allows you to search within those results so that you can use successive searches to "narrow down" what you're looking for. In WOS you have to specify all the search criteria upfront because each search wipes out the results of the previous search.
- FoodLink allows you to search directly for products on special (i.e. "specials" is an actual filter). WOS does not.
- FoodLink displays prices at all times. WOS displays prices only for the items you have put into your basket. If you are trying to do comparison shopping to find the best per-unit price among 20 different brands and sizes of a product, WOS forces you to put all 20 items into your basket, then remove the ones you don't want. That can be a problem because each time you flood your basket in this manner, you make it harder and harder to distinguish between the wanted and unwanted items. The result is that you may end up ordering items you don't want and missing items you do want.

For these reasons, Susan will continue sending the pricelist (products.lzh) file every month for you to import into FoodLink -- at least until UNFI stops supporting FoodLink.