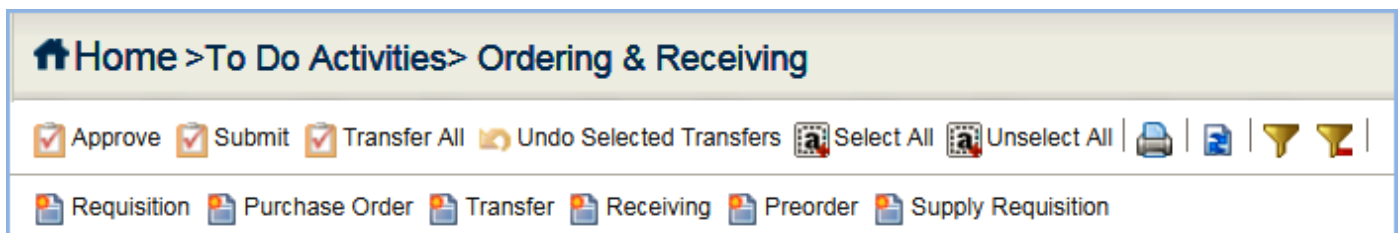
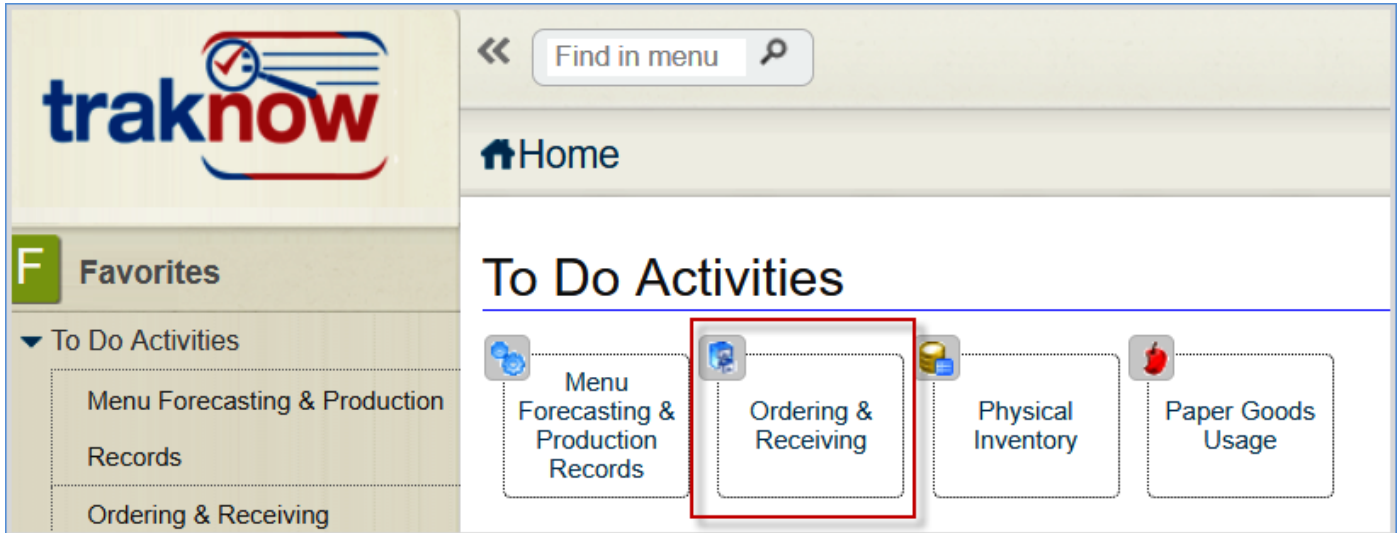


Ordering – Satellite to Base Kitchen

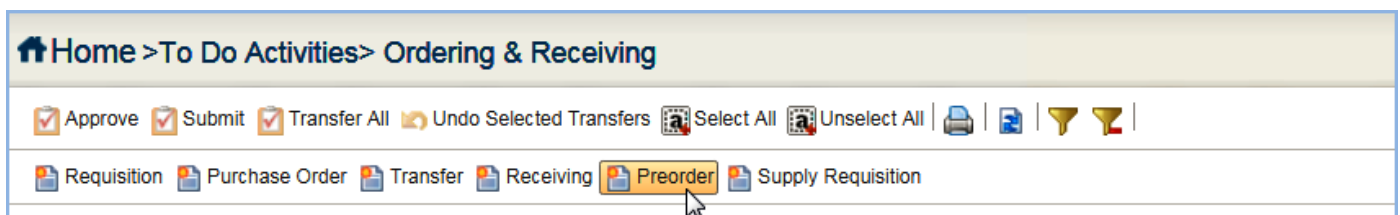
This section will demonstrate how to place orders for US Foods food items from the Base Kitchen. Site managers should follow the ordering procedures established by their District's Food Service Production Schedule (FSPS) and the TrakNOW Implementation Specialist during training.

1. From the Home Page, click "**Ordering & Receiving**"



Creating a Preorder for Food items

2. Click Preorder to create a new order document that will prompt the program to calculate the appropriate order quantities based on menu forecasting. Items can be added or removed. Order quantities can be edited.



3. Select the Delivery Date using the Serving Period dropdown menu.

PreOrder

Pre Order

Delivery Details

Order Id: -- Status: -- Delivery Date: 05/23/2022 [View Delivery Dates](#)

Serving Period: S21 USF due 4/25/22 05/31-06/03

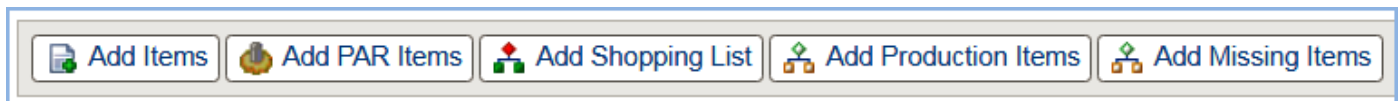
Remarks:

Rounding: ----- Percentage Select: --

Requisition - Items for Purchase

Select	Item Code	Item Name	Ord Qty	Purchase Unit	Description

4. Items can be added to the Preorder in a variety of ways using the corresponding buttons.
 - a. You will use "Add Production Items".
 - b. You will use "Add Missing Items", to capture items and order quantities for satellite Supply Requisitions.
 - c. You can use "Add Items", as needed.
5. Their purpose is defined below.



- a. **Add Items:** This button is used to add individual items to the order from the Item catalog. Within the pop-up window that appears, items can be selected individually, by Class, by List and by Location. Once the items are dropped to the bottom portion of the pop-up, they can be applied to the document using the "Apply" button in the bottom right corner of the pop-up.
- b. **Add Par Items:** This feature will not be used at this time. This button is used to add items to the order when the item's perpetual stock level fails to meet established PAR levels.
- c. **Add Shopping List:** This button is used to open a window to allow the user to select an established shopping list. The shopping list must be created in Item views to be seen. This feature may be used for S&D orders, should training time permit.
- d. **Add Production Items:** This button is used to direct the program to order according to menu forecasting for a specific vendor/supplier and date range. Step by Step procedures are outline below.
- e. **Add Missing Items:** This feature is used by base kitchens to capture order quantities from other sites when those sites submit supply requisitions to the base.

Add Production Items from Menu Forecasting

6. Click "Add Production Items".

PreOrder

Pre Order

Delivery Details

Order Id: -- Status: -- Delivery Date: 05/13/2019 [View Delivery Dates](#)

Serving Period: S19 US Foods 05/20-05/24

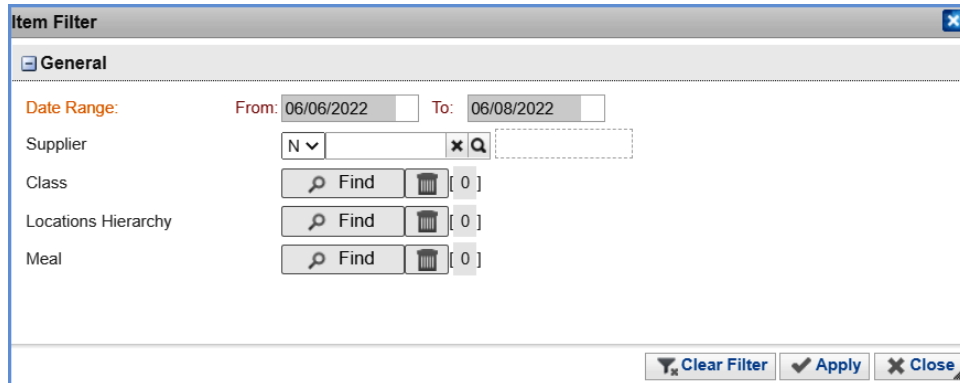
Remarks:

Rounding: ----- Percentage Select: --

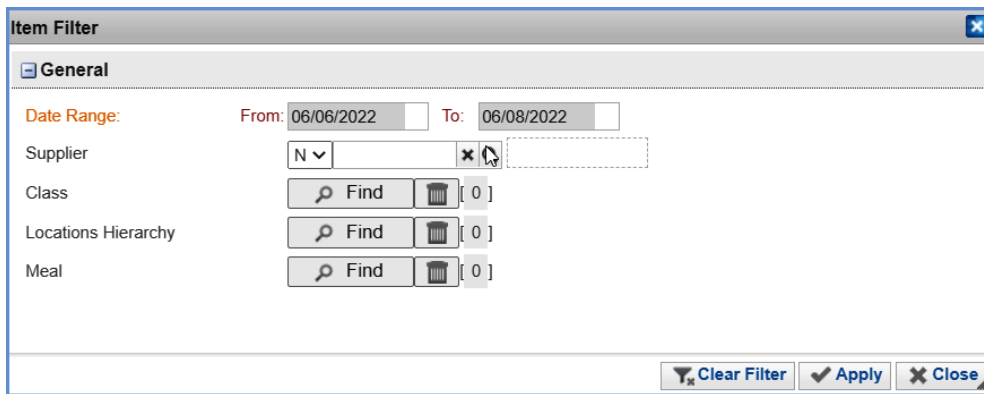
Requisition - Items for Purchase

Select	Item Code	Item Name	Ord Qty	Purchase Unit	Description

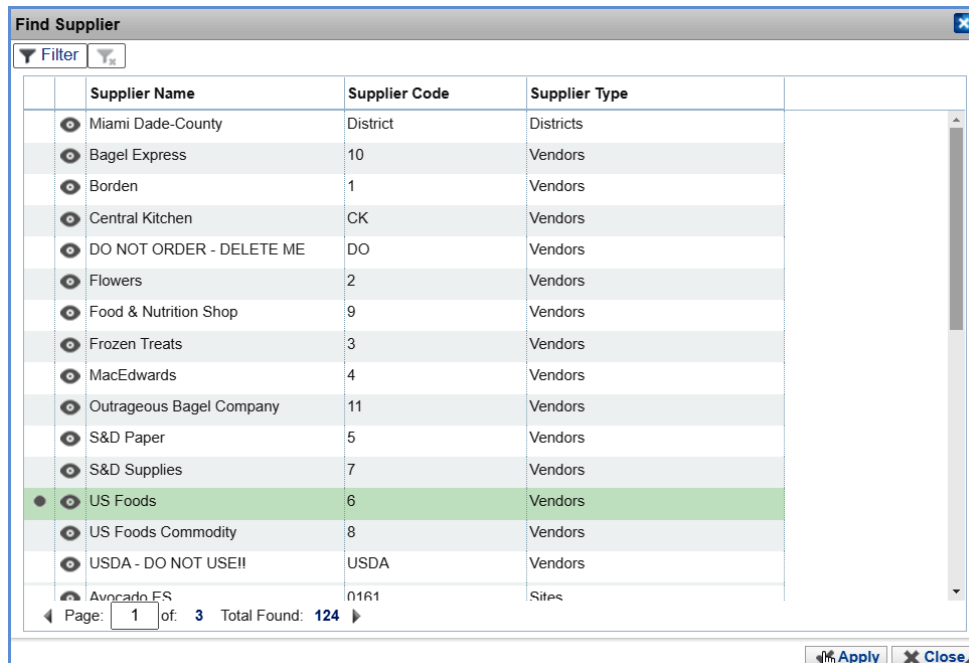
7. A pop-up window filter will appear with criteria options. The information entered into this filter will determine the supplier and items for the Serving Period selected in step 3 from menu forecasting that the utility will reference to populate the order with suggested order quantities for items and recipe ingredients. The "From" date and "To" date automatically populates for the serving period; which is typically Monday - Friday.



8. Select the Supplier. Click the **magnifying glass** to open a listing.



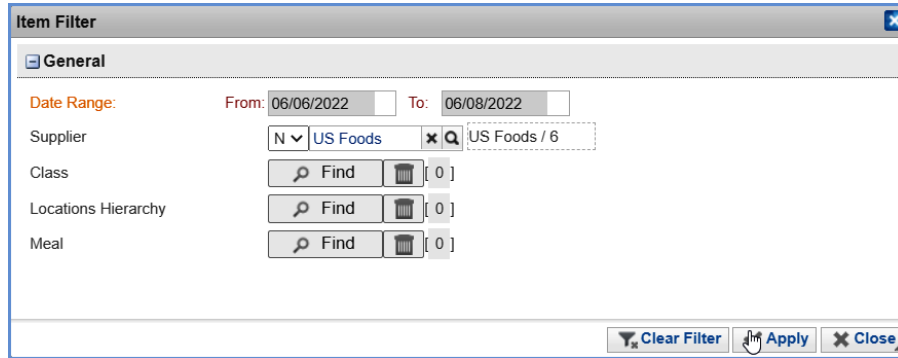
9. Highlight **US Foods**. Click "Apply".



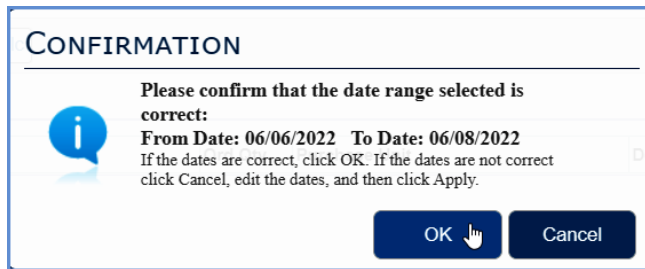
10. The Class, Locations Hierarchy and Meal criteria **will not** be used at this time. Their purpose is defined below.
 - a. **Class:** When a class(es) are identified in the criteria, only items assigned to the class meeting the remainder of the criteria will populate the order.

- b. **Locations Hierarchy:** When locations are identified in the criteria, only items assigned to the location(s) meeting the remainder of the criteria will populate the order.
- c. **Meal:** When the meal type is identified in the criteria, only items from menus of the selected type meeting the remainder of the criteria will populate the order.

11. Click "Apply".

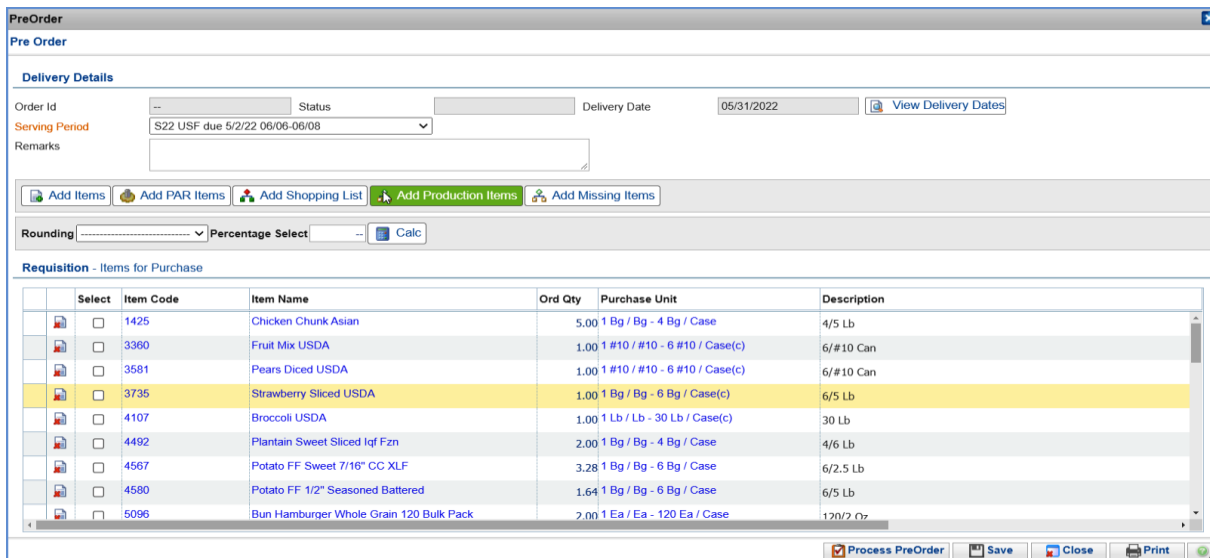


12. A confirmation message will appear requesting you to confirm the serving week date range to be used. If the date range displayed in the message is correct, click "OK". If it is incorrect, click "Cancel" to return to the criteria to re-enter the correct serving week date range to order for.

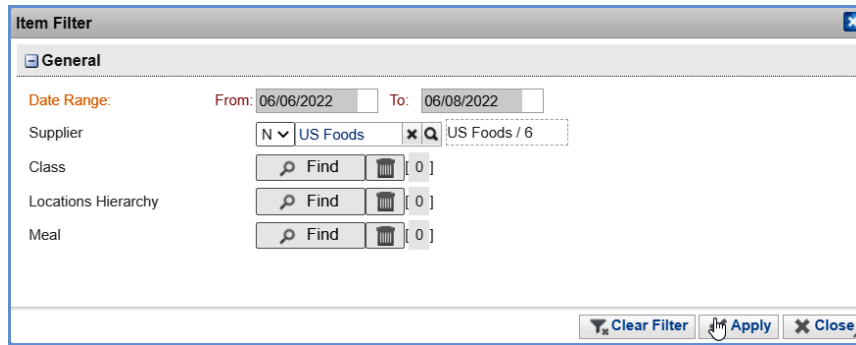


Add Production Items from Menu Forecasting - for US Foods Commodity

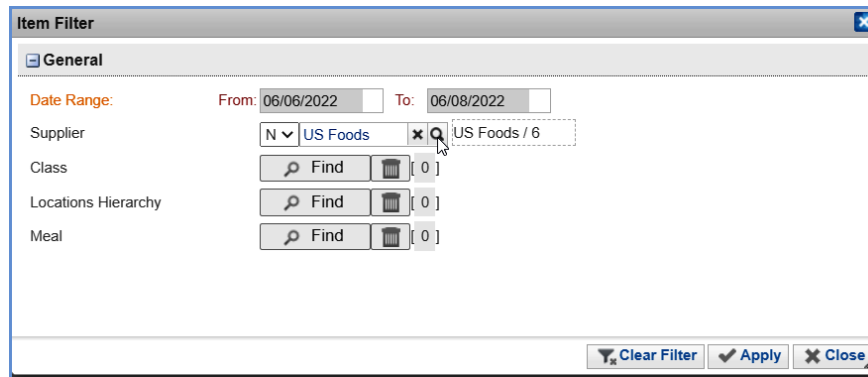
13. Click "Add Production Items".



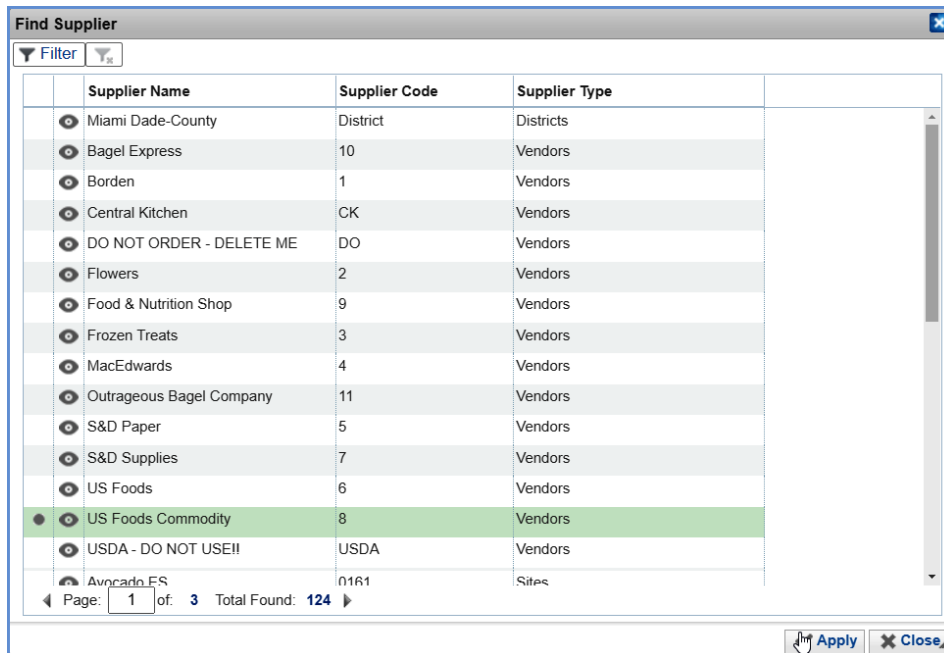
14. A pop-up window filter will appear with criteria options. The information previously entered into this filter will re-appear when the utility is used in succession.



15. Select the Supplier. If US Foods displays from previous use, you must change it to US Foods Commodity. Click the **magnifying glass** to open a listing.



16. Highlight **US Foods Commodity**. Click "Apply".



17. The Class, Locations Hierarchy and Meal criteria **will not** be used at this time. Their purpose is defined below.

- Class:** When a class(es) are identified in the criteria, only items assigned to the class meeting the remainder of the criteria will populate the order.
- Locations Hierarchy:** When locations are identified in the criteria, only items assigned to the location(s) meeting the remainder of the criteria will populate the order.
- Meal:** When the meal type is identified in the criteria, only items from menus of the selected type meeting the remainder of the criteria will populate the order.

18. Click "Apply".

19. A confirmation message will appear requesting you to confirm the serving week date range to be used. If the date range displayed in the message is correct, click "OK". If it is incorrect, click "Cancel" to return to the criteria to re-enter the correct serving week date range to order for.

20. USDA Commodity items will be added to the bottom of the preorder.

Select	Item Code	Item Name	Ord Qty	Purchase Unit	Description
<input type="checkbox"/>	1174	Eggs Frz USDA 30#	0.24	1 Ea / Ea - 6 Ea / Case(c)	6/5 Lb
<input type="checkbox"/>	3494	Peaches Diced USDA	1.33	1 #10 / #10 - 6 #10 / Case(c)	6/#10 Can
<input type="checkbox"/>	3715	Cranbernes USDA	0.67	1 Ea / Ea - 300 Ea / Case(c)	Package - 300/1.16

21. Items can be deleted from the order using the delete icon followed by a confirmation to delete the item.

Requisition - Items for Purchase						
	Select	Item Code	Item Name	Ord Qty	Purchase Unit	
	<input type="checkbox"/>	1316	Egg Roll Chicken Whole Grain	0.98	1 Ea / Ea - 60 Ea / Case	
	<input type="checkbox"/>	1882	Pizza Chicken Buffalo 16" WG Cn	2.08	1 Ea / Ea - 9 Ea / Case	
	<input type="checkbox"/>	1481	Chicken Patty 3 oz Breaded Whole Spicy	4.69	1 Bg / Bg - 4 Bg / Case	

22. Perpetual stock levels can be referenced using the Item Code hyper link.

Requisition - Items for Purchase					
	Select	Item Code	Item Name	Ord Qty	Purchase Unit
	<input type="checkbox"/>	1316	Egg Roll Chicken Whole Grain	0.98	1 Ea / Ea - 60 Ea / Case
	<input type="checkbox"/>	1882	Pizza Chicken Buffalo 16" WG Cn	2.08	1 Ea / Ea - 9 Ea / Case
	<input type="checkbox"/>	1481	Chicken Patty 3 oz Breaded Whole Spicy	4.69	1 Bg / Bg - 4 Bg / Case

23. Ord Qty can be increased, decreased or rounded. Click into the cell to edit.

Requisition - Items for Purchase					
	Select	Item Code	Item Name	Ord Qty	Purchase Unit
	<input type="checkbox"/>	1316	Egg Roll Chicken Whole Grain	0.98	1 Ea / Ea - 60 Ea / Case
	<input type="checkbox"/>	1882	Pizza Chicken Buffalo 16" WG Cn	2.08	1 Ea / Ea - 9 Ea / Case
	<input type="checkbox"/>	1481	Chicken Patty 3 oz Breaded Whole Spicy	4.69	1 Bg / Bg - 4 Bg / Case
	<input type="checkbox"/>	1412	Chicken Patty 1.5 oz Breaded WG	5.54	1 Ea / Ea - 312 Ea / Case

Add Missing Items -

Note: A base kitchen can edit their satellite orders when needed as well as reject the order so that it goes back to the satellite for correction or complete deletion. See the notes at the end of this document for these procedures.

Home > To Do Activities > Ordering & Receiving

Approve
 Submit
 Transfer All
 Undo Selected Transfers
 Auto Process
 Select All
 Unselect All
 Bulk Change

Requisition
 Purchase Order
 Transfer
 Receiving
 Preorder
 Supply Requisition

	View	Del	Edit	Document Type	Flag	Supplier	Destination Site	Document Status	Due Date	Document I...	Ref. Order I...	Creation Dat...	Invoice Nu
<input type="checkbox"/>				Receiving		US Foods	Southwood MS	Draft	04/15/2022	401685		04/15/2022	S18
<input type="checkbox"/>				Receiving		US Foods	Southwood MS	Draft	04/15/2022	401687		04/15/2022	S19
<input type="checkbox"/>				Receiving		US Foods	Southwood MS	Draft	04/15/2022	401719		04/15/2022	S20
<input type="checkbox"/>				Preorder		Southwood MS	Southwood MS	Draft	05/16/2022	404070		04/21/2022	
<input type="checkbox"/>				Supply Requisition		Southwood MS	Palmetto MS	On Order	05/23/2022	405463		04/25/2022	

24. Click "Add Missing Items".

PreOrder

Pre Order

Delivery Details

Order Id: -- Status: -- Delivery Date: 05/31/2022 [View Delivery Dates](#)

Serving Period: S22 USF due 5/2/22 06/06-06/08

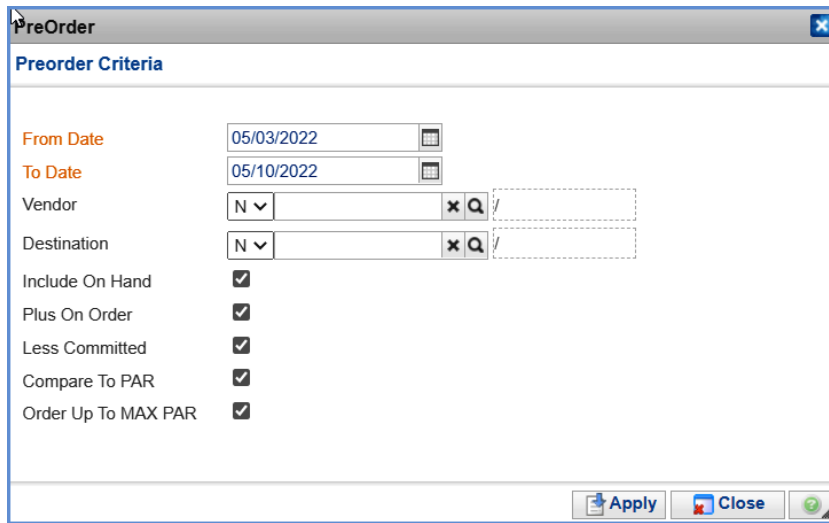
Remarks:

Rounding: ----- Percentage Select: --

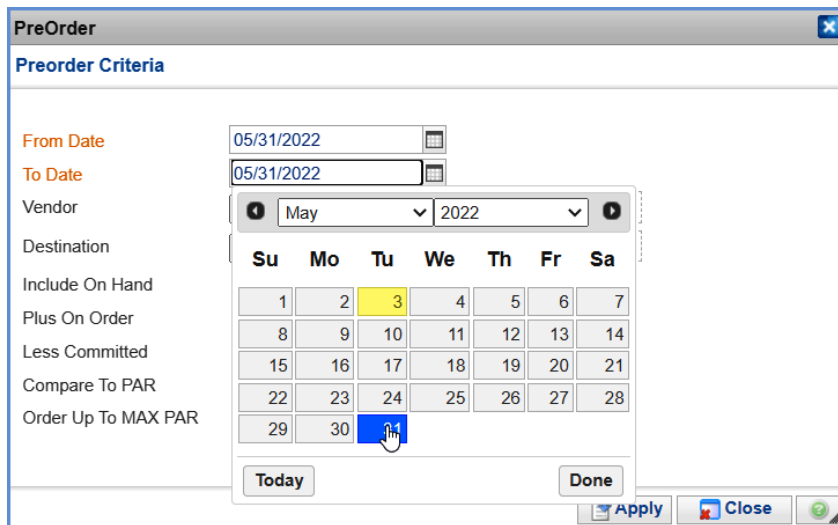
Requisition - Items for Purchase

Select	Item Code	Item Name	Ord Qty	Purchase Unit	Description
<input type="checkbox"/>					

25. The Preorder Criteria pop-up window will appear.

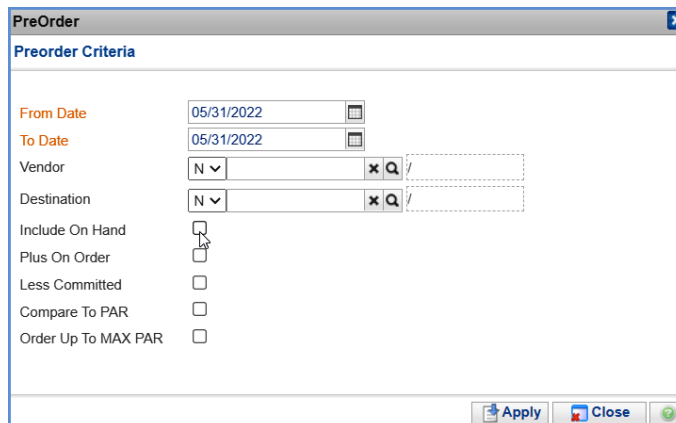


26. Select the Delivery Date of the Supply Requisitions from your satellite site(s) that you need to include in your preorder to US Foods.

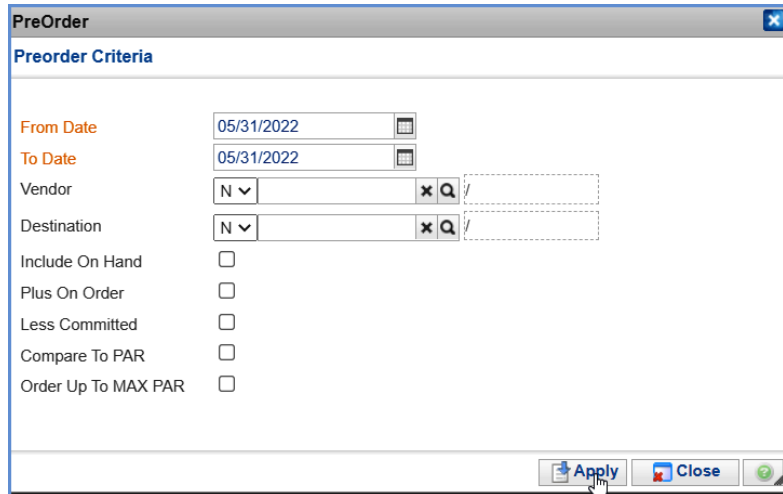


27. Leave the Destination criteria blank, to capture all satellite orders for the date range.

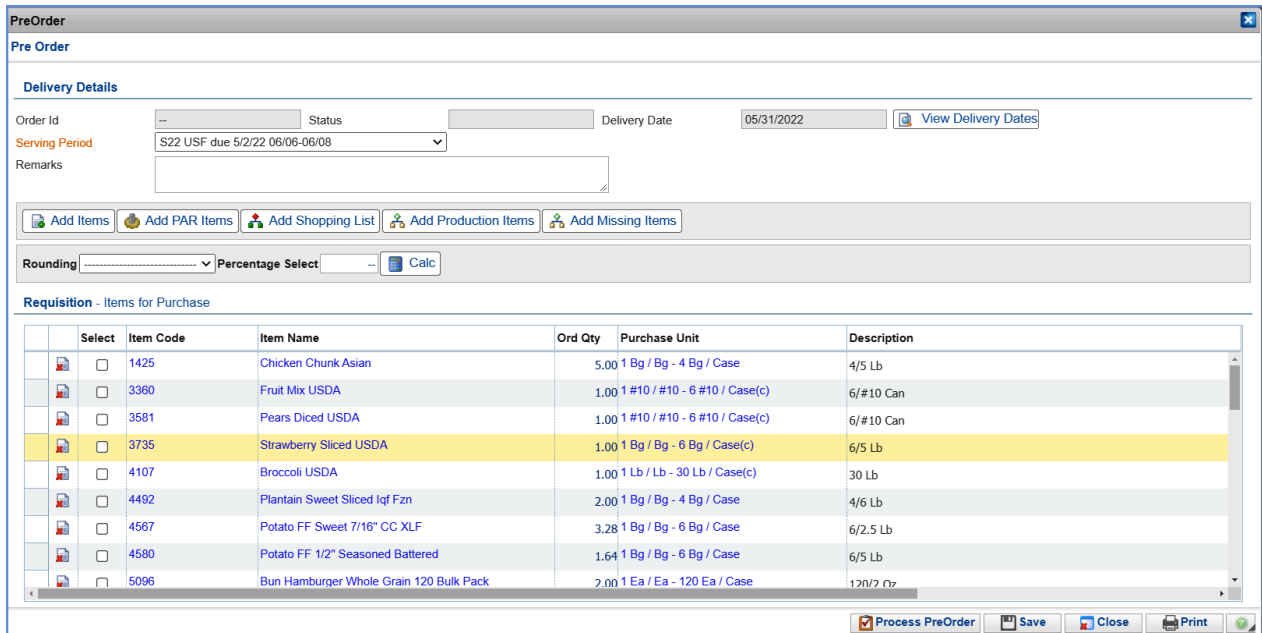
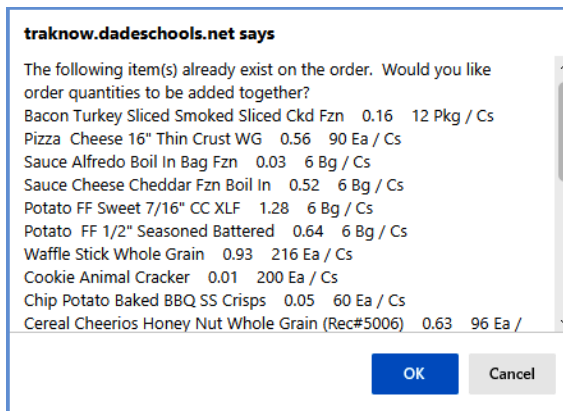
28. Click the checkbox beside "Include On Hand" to remove criteria check marks all at once. No checkmarks should be visible.



29. Click "Apply".



30. The program will add items to the Preorder that were not already on the order from the Supply Requisition for the Satellite. For items already on the Preorder, the software will ask if you would like the Order Quantities to be added together. You need to click "OK" to add order quantities from your menu forecasting to what was added via Add Missing Items for your satellites Supply Requisitions.



PreOrder

Pre Order

Delivery Details

Order Id: -- Status: Delivery Date: 05/31/2022 [View Delivery Dates](#)

Serving Period: S22 USF due 5/2/22 06/06-06/08

Remarks:

Rounding: Percentage Select: Calc

Requisition - Items for Purchase

Select	Item Code	Item Name	Ord Qty	Purchase Unit	Description
<input type="checkbox"/>	1425	Chicken Chunk Asian	5.00	1 Bg / Bg - 4 Bg / Case	4/5 Lb
<input type="checkbox"/>	3360	Fruit Mix USDA	1.00	1 #10 / #10 - 6 #10 / Case(c)	6/#10 Can
<input type="checkbox"/>	3581	Pears Diced USDA	1.00	1 #10 / #10 - 6 #10 / Case(c)	6/#10 Can
<input type="checkbox"/>	3735	Strawberry Sliced USDA	1.00	1 Bg / Bg - 6 Bg / Case(c)	6/5 Lb
<input type="checkbox"/>	4107	Broccoli USDA	1.00	1 Lb / Lb - 30 Lb / Case(c)	30 Lb

31. The action buttons in the bottom right corner can be used.



- Process PreOrder:** submits the order and processes into a requisition in pending status for approval.
- Save:** will save the Preorder in draft status so it can be edited later. Click "OK" to the saved successfully message.
- Close:** will close the document and return to the ordering & receiving main screen. The user will be prompted to save. Agree to save before closing the document.
- Print:** will display a PDF document of the order which can be saved to a file location or printed to paper.

32. To edit a draft Preorder, click the edit icon to open the document.

Home > To Do Activities > Ordering & Receiving

Approve
 Submit
 Transfer All
 Undo Selected Transfers
 Select All
 Unselect All
 Bulk Change

Requisition
 Purchase Order
 Transfer
 Receiving
 Preorder
 Supply Requisition

	Vie...	Del	Edit	Document Type	Supplier	Destination Site	Document Status	Due Date	Document Id	Ref. Order Id	Creation Date	Invoice Number
<input type="checkbox"/>				Purchase Order	US Foods	Booker T Washington SHS	Manage By District	04/15/2019	26865		03/21/2019	
<input type="checkbox"/>				Purchase Order	US Foods Commodity	Booker T Washington SHS	Manage By District	04/15/2019	26866		03/21/2019	
<input type="checkbox"/>				Requisition		Booker T Washington SHS	Pending	04/22/2019	27914		04/02/2019	
<input type="checkbox"/>				Requisition		Booker T Washington SHS	Pending	04/15/2019	27918		04/02/2019	
<input type="checkbox"/>				Preorder		Booker T Washington SHS	Draft	05/13/2019	28215		04/15/2019	

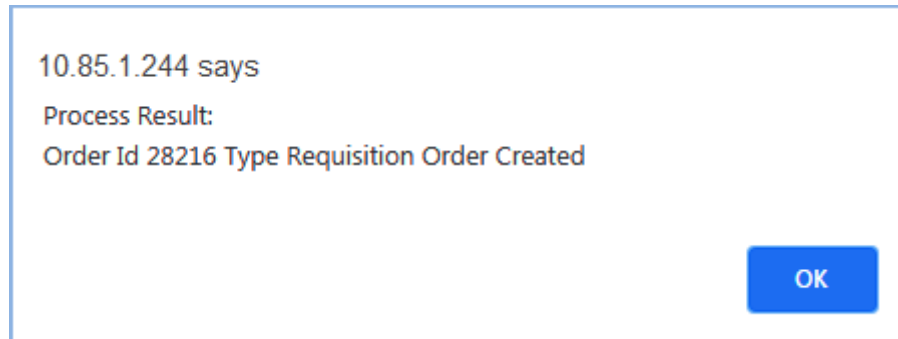
33. When your order is ready to process, Click the "Process Preorder" button.

	<input type="checkbox"/>	9385	Salt Table Iodized Canister	3.02	1 Ea / Ea - 24 Ea / Case	24/26 Oz
	<input type="checkbox"/>	9393	Potato FF Sweet CC Wedge Battered Fzn	1.32	1 Bg / Bg - 6 Bg / Case	6/2.5 Lb
	<input type="checkbox"/>	8081	Sugar White Gran Cane Ex Fine	1.05	1 Lb / Lb - 50 Lb / Case	50 Lb
	<input type="checkbox"/>	9315	Spice Cinnamon Ground Plst Shkr Shif Stabl	2.00	1 Ea / Ea - 1 Ea / Each	18 Oz

Note: You must click the Process PreOrder button by the Monday noted on the Food Service Production Schedule "On Line Ordering Deadline" date. If ordering for S19, you must click Process PreOrder by 4/22.

	S11	S12	S13	S14	S15	S16	S17	S18	S19	S20	S21
Number of days in period:	5	5	5	4	5	5	5	5	5	4	4
Serving Week:	3/18 3/22	4/1 4/5	4/8 4/12	4/15 4/18	4/22 4/26	4/29 5/3	5/6 5/10	5/13 5/17	5/20 5/24	5/28 5/31	6/3 6/6
Food Forecast/Portions											
Last day for Portions Planned Usage generated at ITS:	2/4	2/11	2/19-Tue	2/25	3/4	3/11	3/18	4/1	4/8	4/15	4/22
Deadline for Ordering											
Order groups 1,2, and, 4:	2/19-Tue	2/25	3/4	3/11	3/18	4/1	4/8	4/15	4/22	4/29	5/6
Order group 6: (Paper)	2/25		3/11		4/1		4/15		4/29		5/13
Inventory Dates											
Physical Inventory	3/22				4/26						6/6
Input Due	3/22				4/29						6/6
Delivery Dates											
F/O Groups 1,2,4 Week before:	3/11	3/18	4/1	4/8	4/15	4/22	4/29	5/6	5/13	5/20	5/28
F/O Group 6 Week of:	3/11		4/1		4/15		4/29		5/13		5/28

34. Click "OK" to the process result message.



35. The Preorder turns into a Requisition in pending status.

Home > To Do Activities > Ordering & Receiving												
<input checked="" type="checkbox"/> Approve <input checked="" type="checkbox"/> Submit <input checked="" type="checkbox"/> Transfer All <input type="checkbox"/> Undo Selected Transfers <input type="checkbox"/> Select All <input type="checkbox"/> Unselect All <input type="checkbox"/> Bulk Change <input type="checkbox"/> Print <input type="checkbox"/> Refresh <input type="checkbox"/> Filter <input type="checkbox"/> Sort												
<input type="checkbox"/> Requisition <input type="checkbox"/> Purchase Order <input type="checkbox"/> Transfer <input type="checkbox"/> Receiving <input type="checkbox"/> Preorder <input type="checkbox"/> Supply Requisition												
	View	Del	Edit	Document Type	Supplier	Destination Site	Document Status	Due Date	Document Id	Ref. Order Id	Creation Date	Invoice Number
<input type="checkbox"/>				Purchase Order	US Foods	Booker T Washington SHS	Manage By District	04/15/2019	26865		03/21/2019	
<input type="checkbox"/>				Purchase Order	US Foods Commodity	Booker T Washington SHS	Manage By District	04/15/2019	26866		03/21/2019	
<input type="checkbox"/>				Requisition		Booker T Washington SHS	Pending	04/22/2019	27914		04/02/2019	
<input type="checkbox"/>				Requisition		Booker T Washington SHS	Pending	04/15/2019	27918		04/02/2019	
<input type="checkbox"/>				Requisition		Booker T Washington SHS	Pending	05/13/2019	28216		04/15/2019	