

Ordering - S&D

This section will demonstrate how to place orders for S&D. 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**"

The screenshot shows the TrakNOW Home page. On the left is a sidebar with the TrakNOW logo and a 'Favorites' section containing 'To Do Activities' with sub-items: 'Menu Forecasting & Production Records' and 'Ordering & Receiving'. The main content area is titled 'To Do Activities' and features four activity cards: 'Menu Forecasting & Production Records', 'Ordering & Receiving' (highlighted with a red border), 'Physical Inventory', and 'Paper Goods Usage'. At the top right, there is a search bar labeled 'Find in menu' and a 'Home' link.

This screenshot shows the 'Ordering & Receiving' page. The breadcrumb trail at the top reads 'Home > To Do Activities > Ordering & Receiving'. Below this is a toolbar with several action buttons: 'Approve', 'Submit', 'Transfer All', 'Undo Selected Transfers', 'Select All', and 'Unselect All'. There are also icons for printing, refreshing, and filtering. A second row of buttons includes 'Requisition', 'Purchase Order', 'Transfer', 'Receiving', 'Preorder', and 'Supply Requisition'.

Creating a Preorder for S&D

2. Click "**Preorder**".

This screenshot is similar to the previous one, showing the 'Ordering & Receiving' page. The 'Preorder' button in the bottom toolbar is highlighted with a yellow background and a mouse cursor is pointing at it.

1. Select the Serving Period from the drop-down menu. Select the correct S&D Serving Period and delivery dates noted in the current Food Service Production Schedule, see example below.

PreOrder
Pre Order

Delivery Details

Order Id: [] Status: [] Delivery Date: 03/12/2018 [View Delivery Dates] Serving Period: []

Remarks: []

Rounding: [] Percentage Select: [] [Calc]

Requisition - Items for Purchase

Select	Item Code	Item Name	Ord Qty	Purchase Unit	Description
					S11 S&D Due 2/28 03/19-03/23
					F15 S&D due 11/2 12/07-12/11
					F16 US Foods due 11/2 12/14-12/18
					S01 US Foods due 11/9 01/04-01/08
					S01 S&D due 11/16/20 01/04-01/08
					S02 US Foods due 11/16 01/11-01/15
					S03 US Foods due 11/23 01/19-01/22
					S03 S&D due 11/30 01/19-01/22
					S04 US Foods due 11/30 01/25-01/29
					S05 US Foods due 12/7 02/01-02/05
					S05 S&D due 12/14 02/01-02/05
					S06 US Foods due 12/14 02/08-02/12
					S07 US Foods due 1/4/21 02/16-02/19
					S07 S&D due 1/11/21 02/16-02/19
					S08 US Foods due 1/11/21 02/22-02/26
					S09 US Foods due 1/19 03/01-03/05
					S09 S&D due 1/25 03/01-03/05
					S10 US Foods due 1/25 03/08-03/12
					S11 US Foods Due 2/28 03/19-03/23
					S12 Us Foods Due 3/7 04/02-04/06
					S11 S&D Due 2/28 03/19-03/23

	S11	S12	S13	S14	S15	S16	S17	S18	S19	S20	S21
Number of days in period:	4	5	5	5	5	5	5	5	5	4	4
Serving Week:	3/19 3/22	4/2 4/6	4/9 4/13	4/16 4/20	4/23 4/27	4/30 5/4	5/7 5/11	5/14 5/18	5/21 5/25	5/29 6/1	6/4 6/7
Food Usage/Portion Planned Deadline											
Last day for Portions Planned. Usage generated at ITS:	1/31	2/7	2/14	2/21	2/28	3/7	3/14	3/21	4/4	4/11	4/18
Online Ordering Deadline - Last Day for Revision											
Order groups 1,2, and, 4:	2/28	3/7	3/14	3/21	4/4	4/11	4/18	4/25	5/2	5/9	5/16
Order group 6: (Paper)	2/28		3/14		4/4		4/18		5/2		5/16
Inventory Dates											
Inventory Forms generated at	3/16				4/20				5/18		6/1
Physical Inventory	3/22				4/27				5/25		6/29
Input Due	3/23				4/30				5/25		6/29
Delivery Dates											
F/O Groups 1,2,4 Week before:	3/12	3/19	4/2	4/9	4/16	4/23	4/30	5/7	5/14	5/21	5/29
F/O Group 6 Week of:	3/12		4/2		4/16		4/30		5/14		5/29

- Items can be added to the Preorder in a variety of ways using the corresponding buttons.
 - You will use "Add Items" for S&D.

- 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. This procedure will be used for S&D orders.
- 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.
- 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.
- 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. This procedure will be used to order US Food orders. Step by Step procedures are outline below.
- Add Missing Items:** This feature is not used by the typical school site. It is designed for use by base kitchens to capture order quantities from other sites.

Adding Items

1. Click **"Add Items"**. Find items individually or add by List. You will be trained on this feature in class. Click **"Apply"** in the bottom right corner of the pop up window to add the items to the order document. Add Items can be used as many times as needed.

Find PreOrderItem

Filter By: Item Name Contains wrap Go Filter Filter Class List Location

<input checked="" type="checkbox"/>	Item Name	Item Code	Description
<input type="checkbox"/>	Wrap Plastic 12" x 2000 FT/RL	9654	1 Roll
<input type="checkbox"/>	Wrap Plastic 18" x 2000 FT/RL	9652	1 Roll
<input type="checkbox"/>	Wrap Sandwich Triangle	9661	2000/Case
<input checked="" type="checkbox"/>	Wrap "Hot" Sandwich-Foil	9525	1000/Case

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<input type="checkbox"/>	Item Name	Item Code	Description
<input checked="" type="checkbox"/>	Tray 3-Comp Foam w/Lid	9545	150/Case
<input checked="" type="checkbox"/>	Cup 16 oz Parfait Clear	9506	2500/Case
<input checked="" type="checkbox"/>	Forks Plastic 6 1/4"	9522	1000/Case
<input checked="" type="checkbox"/>	Packet Napkin-Straw-Spork	9507	1000/Case

Page: 1 of 1 Total Found: 4

Apply Close

2. Click into the **Ord Qty** field for each item and enter the number of cases you want to order.

PreOrder

Pre Order

Delivery Details

Order Id: -- Status: Delivery Date: 03/19/2018

Remarks:

Add Items Add PAR Items Add Shopping List Add Production Items Add Missing Items

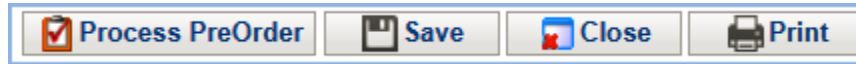
Rounding: Percentage Select: Calc

Requisition - Items for Purchase

Select	Item Code	Item Name	Ord Qty	Purchase Unit	Description
<input type="checkbox"/>	9545	Tray 3-Comp Foam w/Lid	3.00	1 Ea / Ea - 150 Ea / Case	150/Case
<input checked="" type="checkbox"/>	9506	Cup 16 oz Parfait Clear	0.00	1 Ea / Ea - 2500 Ea / Case	2500/Case
<input type="checkbox"/>	9522	Forks Plastic 6 1/4"	0.00	1 Ea / Ea - 1000 Ea / Case	1000/Case
<input type="checkbox"/>	9507	Packet Napkin-Straw-Spork	0.00	1 Ea / Ea - 1000 Ea / Case	1000/Case

Process PreOrder Save Close Print

3. 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.

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

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"/> Select All <input type="checkbox"/> Unselect All <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	S&D	American Senior	Manage By District	03/12/2018	981		03/02/2018	
<input type="checkbox"/>				Purchase Order	US Foods	American Senior	Wait2BReceived	03/12/2018	982		03/02/2018	
<input type="checkbox"/>				Preorder		American Senior	Draft	03/19/2018	985		03/02/2018	

3. Click "Process PreOrder" to submit for approval.

Note: You must click the Process PreOrder button by the Tuesday noted on the Food Service Production Schedule "On Line Ordering Deadline" date. If ordering for S11, you must click Process PreOrder by 2/27. This order will be reviewed/approved on 2/28 as noted on the FSPS below.

You Preorder will not be seen by your supervisor when it is in draft status. Always submit the preorder by using the Process Preorder button.

	S11	S12	S13	S14	S15	S16	S17	S18	S19	S20	S21
Number of days in period:	4	5	5	5	5	5	5	5	5	4	4
Serving Week:	3/19 3/22	4/2 4/6	4/9 4/13	4/16 4/20	4/23 4/27	4/30 5/4	5/7 5/11	5/14 5/18	5/21 5/25	5/29 6/1	6/4 6/7
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Physical Inventory	3/22				4/27				5/25		6/29
Input Due	3/23				4/30				5/25		6/29
Delivery Dates											
F/O Groups 1,2,4 Week before:	3/12	3/19	4/2	4/9	4/16	4/23	4/30	5/7	5/14	5/21	5/29
F/O Group 6 Week of:	3/12		4/2		4/16		4/30		5/14		5/29

PreOrder

Pre Order

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Order Id: -- Status: Delivery Date: 03/19/2018
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Rounding: Percentage Select: Calc

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<input type="checkbox"/>	9506	Cup 16 oz Parfait Clear	2.00	1 Ea / Ea - 2500 Ea / Case	2500/Case
<input type="checkbox"/>	9522	Forks Plastic 6 1/4"	3.00	1 Ea / Ea - 1000 Ea / Case	1000/Case
<input checked="" type="checkbox"/>	9507	Packet Napkin-Straw-Spork	3.00	1 Ea / Ea - 1000 Ea / Case	1000/Case

4. Click "OK" to the process result message. The preorder turns into a requisition.

