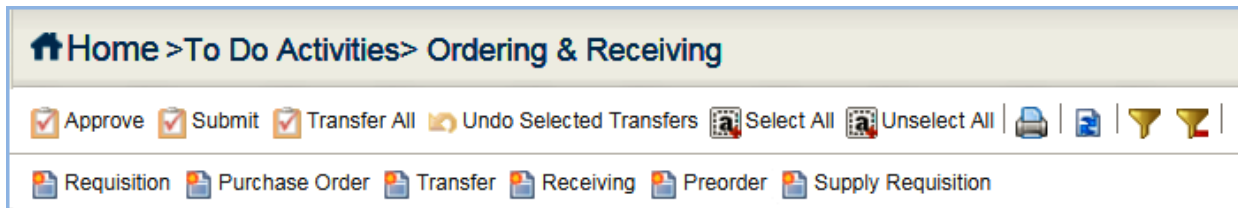
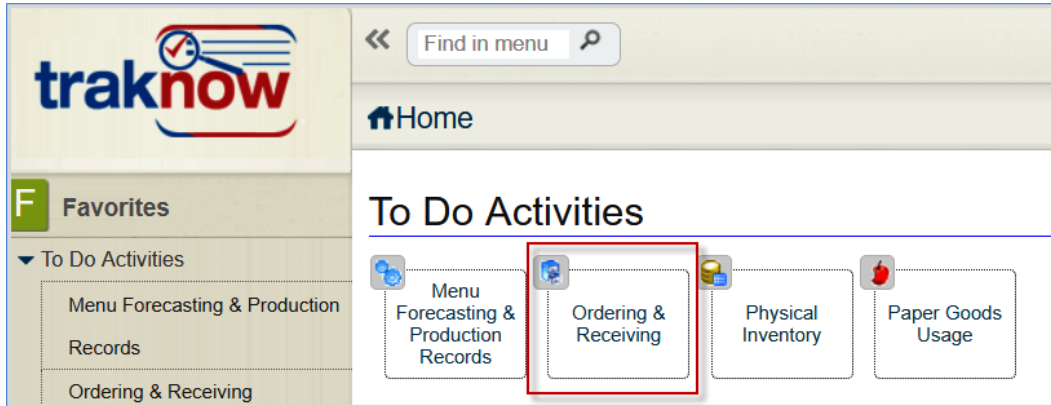


Ordering - US Foods

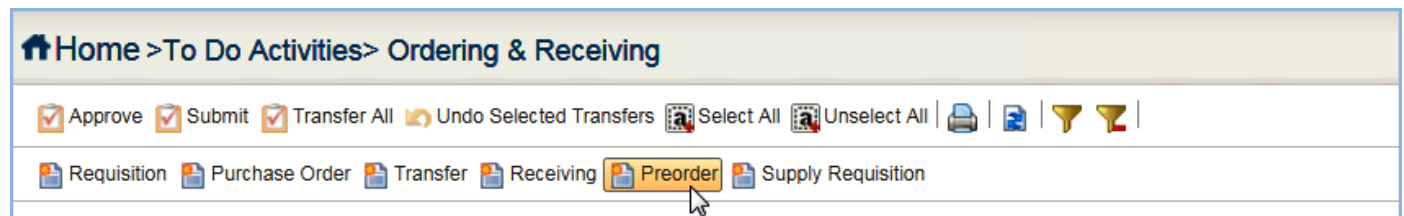
This section will demonstrate how to place orders for US Foods. Site managers should follow the ordering procedures established by their District's Food Service Production Schedule (FSPS) and the TrakNOW Implementation Specialist during training.

- From the Home Page, click "**Ordering & Receiving**"



Creating a Preorder for US Foods

- 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.

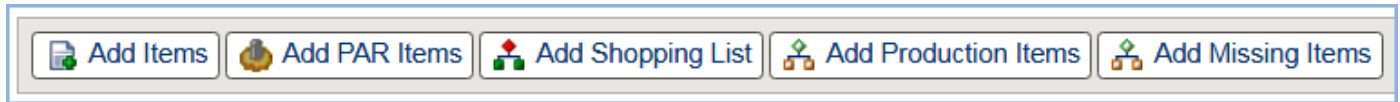


- Select the Serving Period from the drop-down menu. Select the correct US Foods Serving Period and delivery dates noted in the current Food Service Production Schedule, see example below.

Select	Item Code	Item Name	Ord Qty	Purchase Unit	Description
					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
					No Serving Period -

	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

4. Items can be added to the Preorder in a variety of ways using the corresponding buttons.
- You will use "Add Production Items" for US Foods.
 - You can use "Add Items", as needed.



- 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.
- 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.

Add Production Items from Menu Forecasting

5. Click "Add Production Items".

PreOrder

Pre Order

Delivery Details

Order Id: Status: Delivery Date:

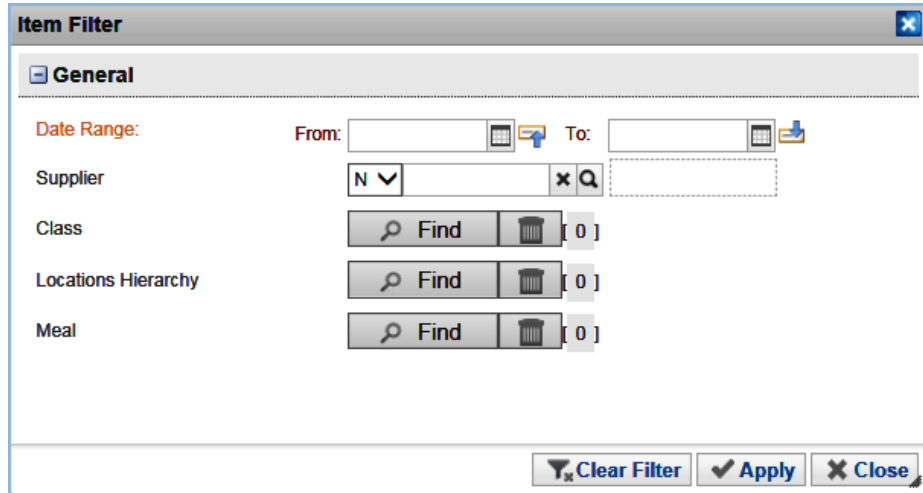
Remarks:

Rounding: Percentage Select:

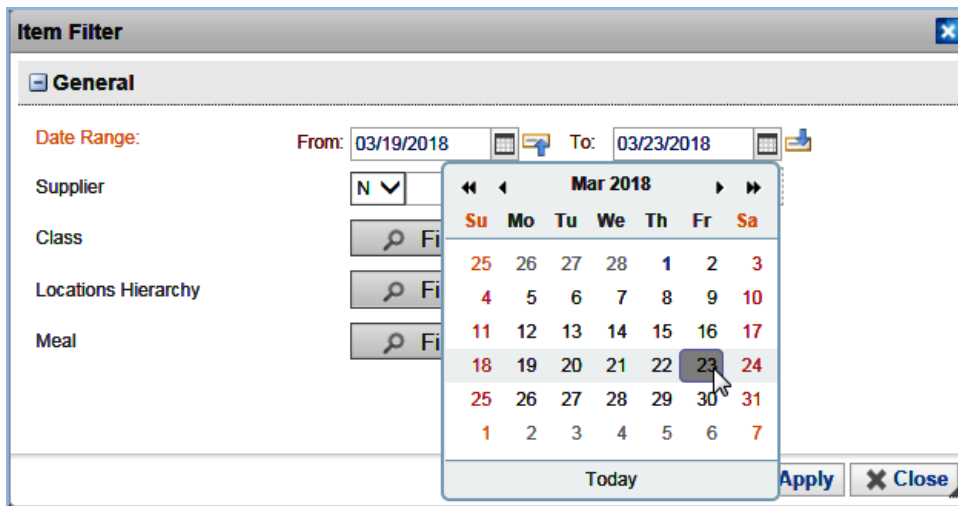
Requisition - Items for Purchase

Select	Item Code	Item Name	Ord Qty	Purchase Unit	Description

- A pop-up window filter will appear with criteria options. The information entered when selecting the Preorder Delivery Date auto fills the Date Range for ordering. Auto populating the serving week and selecting the supplier will then populate the order with suggested order quantities for items and recipe ingredients.



- Date Range is auto-filled from selecting the Serving Period. If the wrong Serving Period was selected then close the order without saving and start a new order. Use the Serving Week noted on the FSPS. OR the calendar utility can be used to select the date range manually if No Serving Period is selected for the Serving Period.
 - Note: Should the button be used multiple times in succession within the same preorder, the previous date range used will populate these fields. Edit as needed.*



	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

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

9. Highlight US Foods. Click "Apply".

	Supplier Name	Supplier Code	Supplier Type
<input type="radio"/>	Miami Dade Florida	District	Districts
<input type="radio"/>	USDA Commodities	USDA	Vendors
<input type="radio"/>	Central Kitchen	CK	Vendors
<input type="radio"/>	Borden	1	Vendors
<input type="radio"/>	Flowers	2	Vendors
<input type="radio"/>	MacEdwards	4	Vendors
<input type="radio"/>	S&D	5	Vendors
<input checked="" type="radio"/>	US Foods	6	Vendors
<input type="radio"/>	Frozen Treats	3	Vendors

Page: 1 of 3 Total Found: 117

10. 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.

11. Click "Apply".

Item Filter

General

Date Range: From: 03/19/2018 To: 03/23/2018

Supplier: N US Foods x US Foods / 6

Class: Find [0]

Locations Hierarchy: Find [0]

Meal: Find [0]

Clear Filter Apply Close

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.

CONFIRMATION

Please confirm that the date range selected is correct:

From Date: 03/19/2018 To Date: 03/23/2018

If the dates are correct, click OK. If the dates are not correct click Cancel, edit the dates, and then click Apply.

OK Cancel

13. Items and Recipe ingredients will populate the order. Order quantities for the serving week menu forecasting will round up to a **full purchase units**, when the preorder is processed in future order stages.

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	Remarks
<input type="checkbox"/>	1316	Egg Roll Chicken Whole Grain	0.98	1 Ea / Ea - 60 Ea / Case	60/3 Oz	
<input type="checkbox"/>	1882	Pizza Chicken Buffalo 16" WG Cn	2.08	1 Ea / Ea - 9 Ea / Case	3/3/41.7 Oz	
<input type="checkbox"/>	1481	Chicken Patty 3 oz Breaded Whole Spicy	4.60	1 Bg / Bg - 4 Bg / Case	4/5 Lb	
<input type="checkbox"/>	1412	Chicken Patty 1.5 oz Breaded WG	5.54	1 Ea / Ea - 312 Ea / Case	312/1.5 Oz	
<input type="checkbox"/>	1927	Pizza Pepperoni Turkey Beef & Mozz	6.25	1 Bg / Bg - 8 Bg / Case	8/2.25 Lb	
<input type="checkbox"/>	1942	Pizza Cheese Garlic 4.55 oz Flatbread	4.33	1 Ea / Ea - 96 Ea / Case	96 Each	
<input type="checkbox"/>	9206	Ketchup Tomato 33% Low Sodium SS	2.77	1 Ea / Ea - 1000 Ea / Case	1000/9 Gr	
<input type="checkbox"/>	3895	4 Oz Fruit Blend Juice	2.85	1 Ea / Ea - 96 Ea / Case	96/Case	
<input type="checkbox"/>	9372	Cereal Kit Honey Nut Cheerio Graham & Fruit Juice	0.53	1 Ea / Ea - 72 Ea / Case	72 Each	
<input type="checkbox"/>	7456	J & J Whole Fruit Cup - Wild Cherry	1.25	1 Ea / Ea - 96 Ea / Case	96/Case	
<input type="checkbox"/>	3917	Juice Fruit Pnch 100% Ctn Fzn	5.25	1 Ea / Ea - 70 Ea / Case	70/6 Oz	

Process PreOrder Save Close Print

14. 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

15. 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

16. 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

17. 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.

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

Home > To Do Activities > Ordering & Receiving												
Approve Submit Transfer All Select All Unselect All Print Refresh Filter												
Requisition Purchase Order Transfer Receiving Preorder 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	

19. 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.

Your 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
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

PreOrder

Pre Order

Delivery Details

Order Id: Status: Delivery Date: 03/01/2021

Serving Period: S10 US Foods due 1/25 03/08-03/12

Remarks:

Rounding: Percentage Select:

Requisition - Items for Purchase

Select	Item Code	Item Name	Ord Qty	Purchase Unit	Description
<input type="checkbox"/>	1170	Egg Liquid Whole Pasturized Bag Fzn	0.18	1 Bg / Bg - 6 Bg / Case	6/5 Lb
<input type="checkbox"/>	1470	Bacon Turkey Sliced Smoked Sliced Ckd Fzn	0.16	1 Pkg / Pkg - 12 Pkg / Case	12/50 Each (600 each)
<input type="checkbox"/>	1480	Sausage Pork Link .68 oz Skinless	0.03	1 Bg / Bg - 6 Bg / Case	6/5 Lb
<input type="checkbox"/>	1544	Chicken 8 Pc 128 Ct Skin on	1.00	1 Bg / Bg - 4 Bg / Case	4/7.5 Lb
<input type="checkbox"/>	1896	Pizza Pepperoni Turkey 16" WG Fzn	0.37	1 Ea / Ea - 90 Ea / Case	90/5.63 Oz
<input type="checkbox"/>	1897	Pizza Cheese 16" Thin Crust WG	0.37	1 Ea / Ea - 90 Ea / Case	90/5.49 Oz
<input type="checkbox"/>	1926	Appetizer Nacho 3 Cheese Refried	0.69	1 Bg / Bg - 8 Bg / Case	8/2.25 Lb

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

vmtnsupport2012 says

Process Result:
Order Id 212703 Type Requisition Order Created