## Creating Paper Goods Usage (Pick Break Spoil PBS)

The purpose of this document is to remove from inventory supplies that were used for meal service. *NOTE: Similar procedures can be used to create a document to remove from inventory items lost due to Freezer/Refrigerator Outages, Damaged/Spoiled, and Recalls etc. See the end of the document for these alternate procedures.*

1. From the Home screen click "Paper Goods Usage".
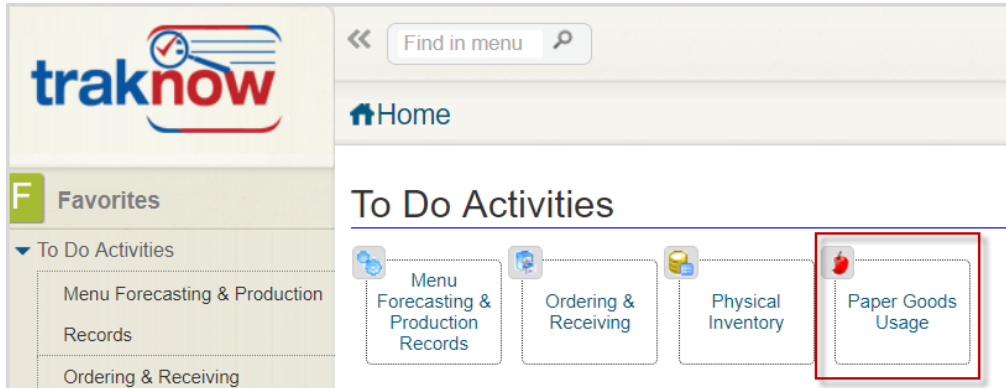
2. To create a new document, click "New".
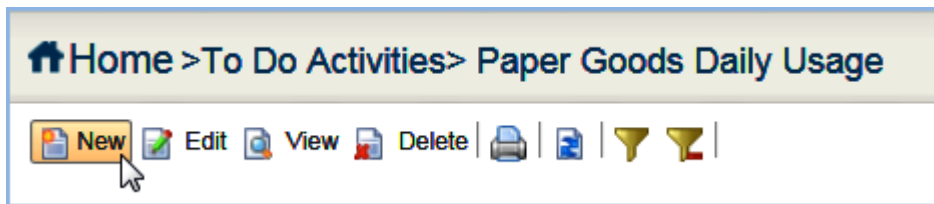
3. Type a name for the document in the name field, (example: Daily or Weekly Supplies)
4. Add a description, if desired.
5. Select "Supplies" as the Meal Type.

6. The system will automatically date the PBS document with the current date but can be changed if needed. The calendar can be accessed by clicking the box in the date field. Choose the correct date if posting PBS to a prior date. In most cases this step can be skipped as daily picks should be created for a current date. **Note: Be careful when back dating item activities that affect stock levels. System only allows 7 days for back dating.**

PickBreakSpoil / 102

Spoilage / Usage Input - Spoilage / Usage Input

General Details

Name	Daily Supplies	Site Name		Code	102
Date	02/28/2018	Status		Meal Type	Supplies
Description					

Feb 2018

Su	Mo	Tu	We	Th	Fr	Sa
28	29	30	31	1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	1	2	3
4	5	6	7	8	9	10

Today

Add Items

Items to Adju...

View	m Code	Used Qty	UU/PU	Reason	Usage Unit	Qty. On-l

7. Click "Add Items" ![Add Items].
8. The list of inventory items will appear on the screen.
9. Items may be added by using the Filter By, Class, List or Location searches.
10. Click "Apply" once all items have been selected.

Find InventoryItem

Filter By [Item Name ▼] [Contains ▼] [tray] [Go] [▼ Filter] [▼x] [🔍 Class] [🔍 List] [🔍 Location]

☑		Item Name	Item Code	Description
⬇	👁	Lid Clear to fit Poly Tray	9559	250/Case
⬇	👁	Tray 3-Comp Foam w/Lid	9545	150/Case
⬇	👁	Tray Boat	9528	1000/Case
⬇	👁	Tray Poly 1-Comp Black	9557	250/Case
⬇	👁	Tray Vending	9560	1080/Case

◀ Page: 1 of: 1 Total Found: 6 ▶

🗑		Item Name	Item Code	Description
✖	👁	Tray Boat	9528	1000/Case
✖	👁	Packet Napkin-Straw-Spork	9507	1000/Case
✖	👁	Container Plastic 4 oz	9586	1000/Case
✖	👁	Gloves Plastic Medium	9527	10 Box/Case
✖	👁	Tray Poly 3-Comp Black	9542	250/Case

◀ Page: 1 of: 1 Total Found: 5 ▶

[✔ Apply] [✖ Close]

11. The UU/PU description defaults to the usage unit. When entering usage by the case, click the unit to select the PU purchase unit description.

PickBreakSpoil / 102

Spoilage / Usage Input - Spoilage / Usage Input

General Details

Name	Daily Supplies	Site Name		Code	102
Date	02/28/2018	Status		Meal Type	Supplies
Description					

Add Items

Items to Adjust

	View	Item Name	Item Code	Used Qty	UU/PU	Reason	Usage Unit	Qty. On-Hand	Adj. Qty On-Hand	Description
● 📄 📄 ...		Tray Boat	9528		Each	Picked for Production or Sale	Each	0.00	0.00	1000/Case
📄 📄 ...		Packet Napkin-Straw-Spork	9507		Each	Picked for Production or Sale	Each	0.00	0.00	1000/Case
📄 📄 ...		Container Plastic 4 oz	9586		1 Ea / Ea - 1000 Ea / Case	Picked for Production or Sale	Each	0.00	0.00	1000/Case
📄 📄 ...		Gloves Plastic Medium	9527		Box	Picked for Production or Sale	Box	0.00	0.00	10 Box/Case
📄 📄 ...		Tray Poly 3-Comp Black	9542		Each	Picked for Production or Sale	Each	0.00	0.00	250/Case

13. Enter the quantity of the items used in the Used Qty column according to the UU/PU description that displays for each item.

PickBreakSpoil / 102

**Spoilage / Usage Input - Spoilage / Usage Input**

General Details

Name	Daily Supplies	Site Name		Code	102
Date	02/28/2018	Status		Meal Type	Supplies
Description					

Add Items

Items to Adjust

	View	Item Name	Item Code	Used Qty	UU/PU	Reason	Usage Unit	Qty. On-Hand	Adj. Qty On-Hand	Description
		Tray Boat	9528	300.00	Each	Picked for Production or Sale	Each	3000	2700	1000/Case
		Packet Napkin-Straw-Spork	9507	500.00	Each	Picked for Production or Sale	Each	7000	6500	1000/Case
		Container Plastic 4 oz	9586	175.00	Each	Picked for Production or Sale	Each	6000	5825	1000/Case
		Gloves Plastic Medium	9527	1.00	Box	Picked for Production or Sale	Box	10	9	10 Box/Case
●		Tray Poly 3-Comp Black	9542	2.00	1 Ea / Ea - 250 Ea / Case	Picked for Production or Sale	Each	1250	750	250/Case

Note: If the Qty. On-Hand minus Used Qty entered is less than zero, the message below will appear. Click OK to continue. Follow business practices set up by District.

Message from webpage

⚠ Usage quantity is larger than the stock level !!!

OK
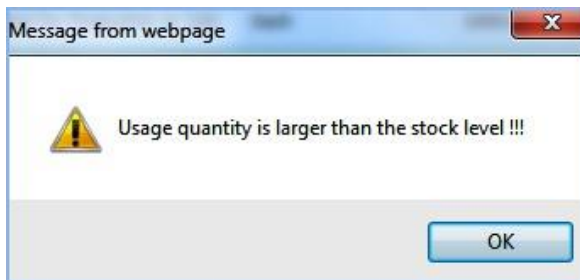
14. The "Reason" for reducing inventory using a PBS defaults to "Picked for Production or Sale". No change to this "Reason" is required for Supplies.

Items to Adjust

	View	Item Name	Item Code	Used Qty	UU/PU	Reason	Usage Unit	Qty. On-Hand	Adj. Qty On-Hand	Description
●		Tray Boat	9528	300.00	Each	Picked for Production or Sale ▾	Each	0.00	-300	1000/Case
		Packet Napkin-Straw-Spork	9507	500.00	Each		Each	0.00	-500	1000/Case
		Container Plastic 4 oz	9586	175.00	Each	Picked for Production or Sale	Each	0.00	-175	1000/Case
		Gloves Plastic Medium	9527	1.00	Box	Expired	Box	0.00	-1	10 Box/Case
		Tray Poly 3-Comp Black	9542	2.00	1 Ea / Ea - 250 Ea / Case	Breakage and Spoilage	Each	0.00	-500	250/Case
						Recalled				
						Used for Recipe Production				
						Returned to Vendor				

15. Scroll to the right side of the screen to check the "Qty on Hand" and the "Adj Qty on Hand" to ensure that the "Used Qty" you entered will reduce the stock level as you expect. These values are reflected in UU broken unit quantities.
    a. The "Qty on Hand" is the stock available in UU broken units at the exact moment the document was created. If the document sits in draft status while other stock changing activities occur for the item, this value will not update according to other activities. PBS documents should not stay in Draft status very long.
    b. The "Adj Qty on Hand" is a calculation based on "Qty on Hand" minus the "Used Qty" entered reflected in UU broken units.

PickBreakSpoil / 102
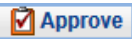
Spoilage / Usage Input - Spoilage / Usage Input

General Details

Name	Daily Supplies	Site Name		Code	102
Date	02/28/2018	Status		Meal Type	Supplies
Description					

Add Items

Items to Adjust

	View	Item Name	Item Code	Used Qty	UU/PU	Reason	Usage Unit	Qty. On-Hand	Adj. Qty On-Hand	Description
		Tray Boat	9528	300.00	Each	Picked for Production or Sale	Each	3000	2700	1000/Case
		Packet Napkin-Straw-Spork	9507	500.00	Each	Picked for Production or Sale	Each	7000	6500	1000/Case
		Container Plastic 4 oz	9586	175.00	Each	Picked for Production or Sale	Each	6000	5825	1000/Case
		Gloves Plastic Medium	9527	1.00	Box	Picked for Production or Sale	Box	10	9	10 Box/Case
●		Tray Poly 3-Comp Black	9542	2.00	1 Ea / Ea - 250 Ea / Case	Picked for Production or Sale	Each	1250	750	250/Case

16. Click "Approve" **☑ Approve** to pull item(s) from inventory and close the document.

PickBreakSpoil / 102

Spoilage / Usage Input - Spoilage / Usage Input

General Details

Name	Daily Supplies	Site Name		Code	102
Date	02/28/2018	Status		Meal Type	Supplies
Description					

Add Items

Items to Adjust

	View	Item Name	Item Code	Used Qty	UU/PU	Reason	Usage Unit	Qty. On-Hand	Adj. Qty On-Hand	Description
●		Tray Boat	9528	300.00	Each	Picked for Production or Sale	Each	0.00	-300	1000/Case
		Packet Napkin-Straw-Spork	9507	500.00	Each	Picked for Production or Sale	Each	0.00	-500	1000/Case
		Container Plastic 4 oz	9586	175.00	Each	Picked for Production or Sale	Each	0.00	-175	1000/Case
		Gloves Plastic Medium	9527	1.00	Box	Picked for Production or Sale	Box	0.00	-1	10 Box/Case
		Tray Poly 3-Comp Black	9542	2.00	1 Ea / Ea - 250 Ea / Case	Picked for Production or Sale	Each	0.00	-500	250/Case

Approve   **Save**   **Close**   **Print**

17. Click "OK"

Message from webpage

⚠ Saved Successfully!

OK
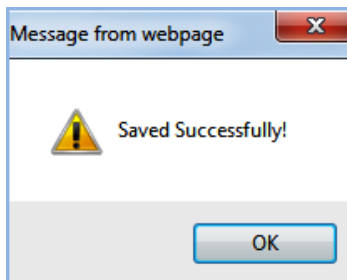
Or

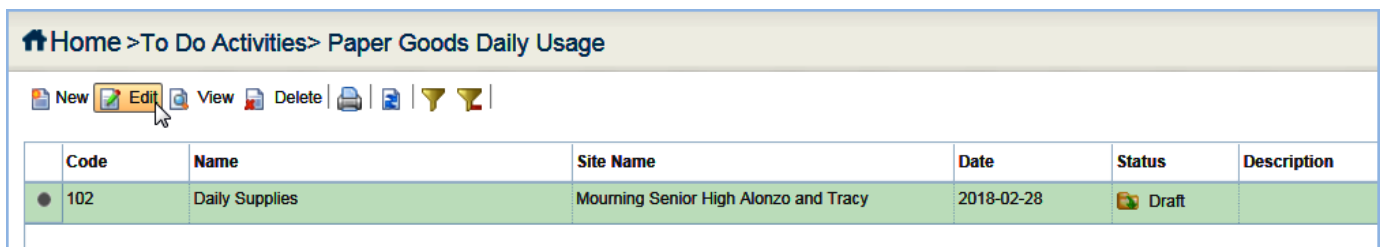18. The user may encounter two additional messages before the "Saved Successfully"   message appears.

   a.   When there are negative values in the "Adj. Qty on Hand" column, the user will get the message below. Click "OK" to finalize approval. Click "Cancel" to stop the approval and return to the document.

Message from webpage ❓ There is some negative leftover quantity

OK   Cancel
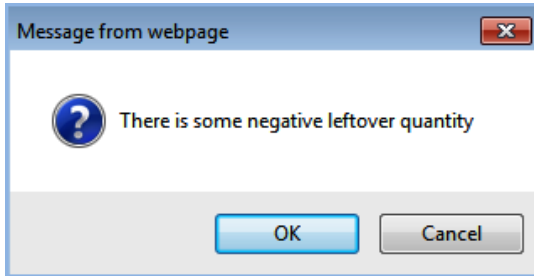
Note: At any time after the creation of the document, it can be saved and returned to for further editing. Click "Save" in the bottom right corner of the document.
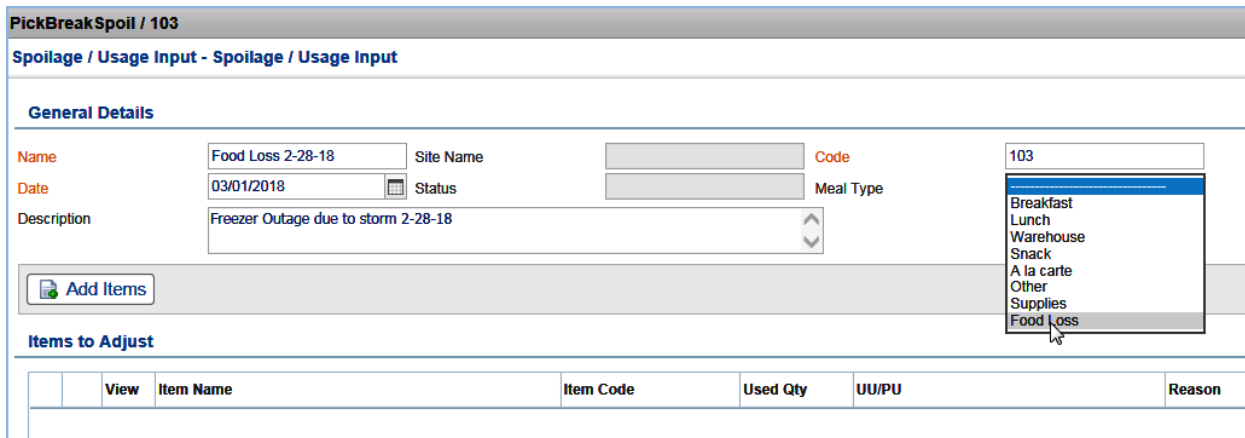
📄 Approve | 💾 Save 🖱 | 🔲 Close | 🖨 Print | ❓

To open the document for continued editing, highlight to select the document then click "Edit".

🏠 Home >To Do Activities> Paper Goods Daily Usage

📄 New 📝 Edit 📄 View 📄 Delete | 🖨 | 📄 | 🔻 🔻 |

	Code	Name	Site Name	Date	Status	Description
⚫	102	Daily Supplies	Mourning Senior High Alonzo and Tracy	2018-02-28	📁 Draft	

Freezer/Refrigerator Outage

1. Follow procedures 1-4 above to create a "New" document.
2. Select "Food Loss" as the Meal Type

PickBreakSpoil / 103

Spoilage / Usage Input - Spoilage / Usage Input

General Details

Name	Food Loss 2-28-18	Site Name		Code	103
Date	03/01/2018	Status		Meal Type	
Description	Freezer Outage due to storm 2-28-18				

————————————
Breakfast
Lunch
Warehouse
Snack
A la carte
Other
Supplies
Food Loss

📄 Add Items

Items to Adjust

	View	Item Name	Item Code	Used Qty	UU/PU		Reason

3. Follow the remaining procedures above to reduce inventory for Food Loss due to outage.

Recalls

Follow the procedures outlined above for Recalls but leave the Meal Type blank and change the Reason for each item to "Recalled"