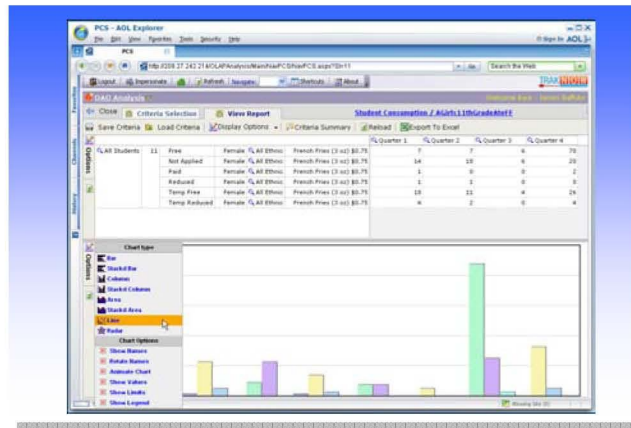




TRAKNOW

NUTRITION ON THE WEB!

Manager's Daily Guide



Managers Daily Guide for TrakNOW V6

Version 3.0.0

© 2010 PCS Revenue Control Systems, Inc.

Table of Contents

Introduction	2
General Information	4
Logging In	6
Production Planning	8
Editing Menus for Production Planning	10
Editing Patterns	13
Printing Production Worksheet	15
Ordering Procedures	18
Add Items	20
Add Par Items	20
Add Item List	21
Add Shopping List	23
Add Production Items	24
Receiving Procedures	28
Blank Receiving	30
Transfers	32
Transfers from Warehouse	33
Transfers between Sites	34
Send a Transfer	35
Receive a Transfer	38
Posting Production	40
Adding Additional Item / Recipes / Patterns	42
Adding Leftovers	43
Entering Prepared Amounts, Meals Served and Leftovers in Production	45
Pick, Break and Spoil	48
Search for Closed Documents	49
Creating Additional Pick, Break and Spoil	51
Physical Inventory	54
Creating Inventory List	55
Entering Inventory Count	60



PCS
YOU CAN COUNT ON US!



This Manager's Daily Guide has been developed to help perform day - to - day **Inventory** and **Production** functions using **TrakNOW** from PCS.
The Daily Routine will include:

Production Planning - This is where forecasting for accurate production begins.

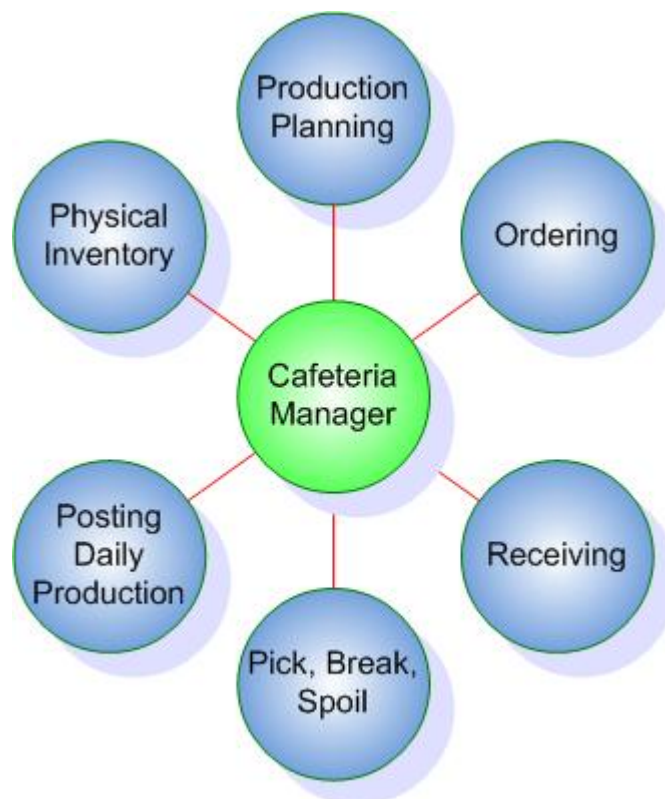
Ordering - Creating Orders to fill the Menu requirements. **TrakNOW** offers several methods of creating orders. The district will decide as to what is the best method.

Receiving - As items are delivered they must be received in order to maintain an accurate inventory.

Posting Daily Production - The Planned Production must be posted in order to provide a record of item usage. Posting provides important Planned vs Actual information that is used in future planning.

Pick, Break and Spoil - Recording of items Picked for Production, Breakage, and Spoilage, will maintain an accurate inventory that contributes to a profitable operation.


Physical Inventory - A periodic Physical count of Inventory will ensure the perpetual inventory is accurate. **TrakNOW** provides tools to easily prepare for and report on a Physical Inventory.



[illegible]

General Information

A red asterisk * next to a field name indicates a required field.




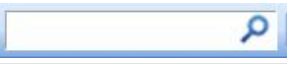




Clicking the Paper Icon “Apply”,  will open a window containing all records that begin with the letter searched for.

Clicking the Magnified Glass Icon “Find”,  will open a window containing all records.

Clicking the Eraser Icon “Clear”,  will delete a search value from a field.

The following main icons repeat throughout the system:














Icon	Description
 Logout	Exit the System
	Home Navigation
 Refresh	Refresh Screen
	Navigate via Search
 Shortcuts	Navigate via shortcut list to other windows in the system. The list appears on the left side of the screen.
 Help  About  Help	About: Lists version of system in use Help: TrakNOW Manual

General Information

The following icon bar repeats throughout the system:

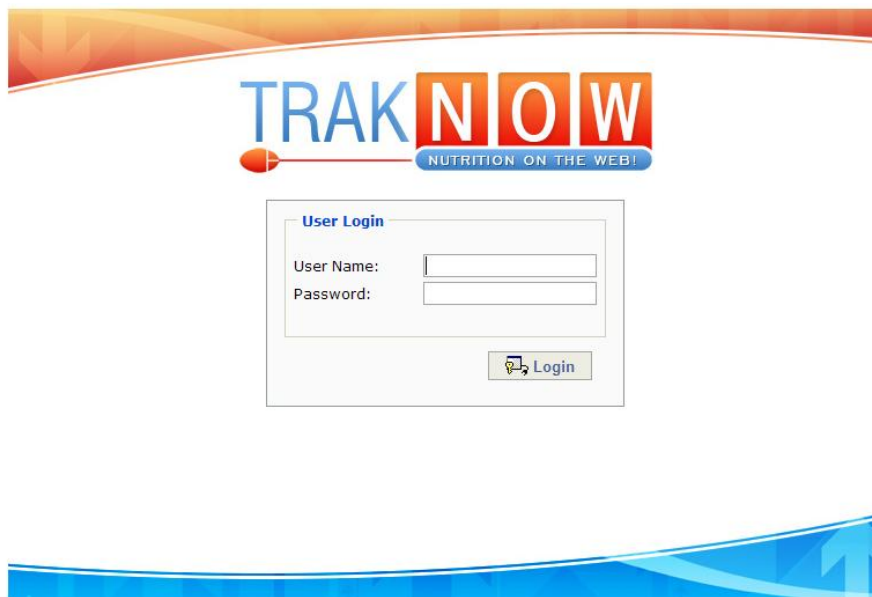


Icon	Description
 Close	Close Window and Back one Screen
 New	Start New Entity (i.e. new site, new recipes, etc.)
 Edit	Edit Highlighted Document
 View	View Highlighted Document, data will not be editable
 Delete	Delete Highlighted Document
 Copy	Copy Highlighted Document
	Print Screen
	Refresh Screen
	Filter the List
	Clear Filter
	Organize (Hide, Add or Move) List Columns

This screen is accessed by clicking on the TRAKNOW icon located on the desktop.



1. Click the "TrakNOW" icon to enter the software.



2. Enter the User Name and Password provided by the district system support personnel.

This image shows a full page of white paper with horizontal blue ruling lines. The lines are evenly spaced and run across the width of the page, providing a template for handwriting practice or general writing. There are no margins, text, or other markings on the page.

This section will demonstrate how to add a menu, edit a menu and forecast meals for daily production.



1. Click on "Site Production" on the Home Page (the Home Page may look slightly different, as each district can customize the Home Page favorites).

2. Enter the specified date range to plan for the upcoming production for the next cycle/ordering period.
3. Click "Apply" to enter the production menu.

4. Click on the planned production date. The box with the check mark will highlight in yellow and the menu(s) for that day will appear on the right hand side of the screen.

Editing Menus for Production Planning

Close
Edit Criteria
Save Day
Nutrition Report

Calendar

January/2010

Sun	Mon	Tue	Wed	Thu	Fri	Sat
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	29	30
31						

February/2010

Sun	Mon	Tue	Wed	Thu	Fri	Sat
	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						

Production Day

Production Info For Day : 01/06/2010

Type	Item Name	Code \ CNCcode	Serving Size	Serving Type	Student Planned Servings	Adults / a la Carte Planned Servings	Total Planned Servings
Breakfast / Second. Break. Fri Wk 2 / Grades 6-12 (Breakfast) /Serving location: Internal / 80 (# Of Servings) /Open							
	Recipe - Scrambled Eggs	J - 1	1.00	Serving (4 x 5 cut)(1.00-52.59oz)	20	0	20

Menu - Webpage Dialog

http://pcstraknow.com/Kleintesting/TemplatesServer/ScreenEntity/ScreenEntityPage.aspx?ET=RecipeMenu&TT=Single&WM=2&UID=348824&Sid=1262795254787&UITH=blue

Name: **Second. Break. Fri Wk 2** Code: **SBW2D5**

Menu Planning Food Based

General Details

Menu Name: **Second. Break. Fri Wk 2** Menu Code: **SBW2D5** Meal Type Name: **Breakfast**

Planned # of Servings: **80** Serving Location: **N** Internal / Internal

Age Group: **Grades 6-12 (Breakfast)**

Add Menu Item: **Item** Item/Recipe/Pattern

Inactive: ☐

1. Click on “Edit”,  to enter the Menu Planning section of the production record.

Name: **Second, Break, Fri Wk 2** Code: **SBW2D5**

Menu Planning **Food Based**

General Details

Menu Name: **Second, Break, Fri Wk 2** Menu Code: **SBW2D5** Meal Type Name: **Breakfast**

Planned # of Servings: **80** Serving Location: **N** Internal / Internal

Age Group: **Grades 6-12 (Breakfast)**

Add Menu Item: **Item** Item/Recipe/Pattern:

Inactive: ☐

Item: **N** Menu Item type:

Serving Size: Serving Type: Planned Servings: Add

Item Leftover: **N** Course: Portion Size: Serving Type: Left Over amount: Add

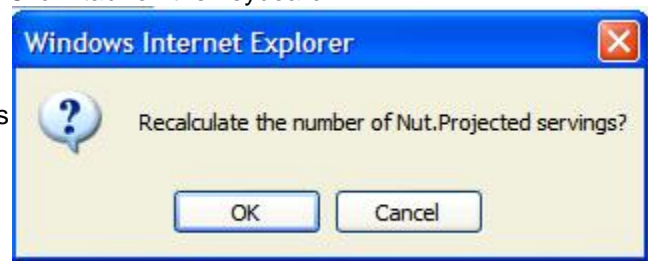
Menu Items (= A CH Database Serving Type)**

		Name	Type	Code	Menu Item type	Servi...	Serving Type	Student Pl...	Adult / a l...	Total Plan...	Leftovers Added
↑	↓	<u>Scrambled Eggs</u>	Recipe	J - 1		1.00	<u>Serving (4 x 5 cut) (1.00-52.59g)</u>	20	0	20	0
↑	↓	<u>Sausage Patty</u>	Item	8922447		1.00	<u>Each (1.025 oz) (1.00-29.06g)</u>	0	0	20	0
↑	↓	<u>Pears, Sliced, light syrup</u>	Item	480038		1.00	<u>Scoop#8 (Breakfast) (1.00-121.5...</u>	20	0	0	0
↑	↓	<u>Pears, Diced, light syrup</u>	Item	480202		1.00	<u>Scoop#8 (Breakfast) (1.00-127.8...</u>	20	0	20	0
↑	↓	<u>Juice, 4 oz</u>	Pattern	J3		1.00	<u>Each (1.00-113.40g)</u>	50	0	50	0
↑	↓	<u>Cinnamon Rolls, Homemade</u>	Recipe	B - 1b		1.00	<u>each (1.00-114.33g)</u>	80	0	80	0
↑	↓	<u>Cereal, Assorted</u>	Pattern	C3		1.00	<u>Each (1.00-24.33g)</u>	30	0	30	0
↑	↓	<u>Toast</u>	Recipe	L - 16		1.00	<u>Slice (1.00-30.06g)</u>	12	0	12	0

UOM Converter Nutrition Calculator Pre-Cost Detail Save Close Print

2. The menu items will appear on the screen. Information such as recipe number, portion size, and projected servings will be displayed.
3. Enter the number of projected servings for the meal in the "Planned # of Servings" box. The total should include the Student Planned Servings of the entrées. Click "tab" on the keyboard.

4. Click "OK" to recalculate the district planned numbers to change them to the number entered in the projected # of servings box.



Editing Menus for Production Planning

Name: **Second, Break, Fri Wk 2** Code: **SBW2D5**

Menu Planning **Food Based**

General Details

Menu Name: **Second, Break, Fri Wk 2** Menu Code: **SBW2D5** Meal Type Name: **Breakfast**

Planned # of Servings: **80** Serving Location: **N** Internal / Internal

Age Group: **Grades 6-12 (Breakfast)**

Add Menu Item: **Item** Item/Recipe/Pattern

Inactive: ☐

Item: **N** Menu Item type: **-----**

Serving Size: **-----** Serving Type: **-----** Planned Servings: **-----** Add

Item Leftover: **N** Course: **-----** Portion Size: **-----** Serving Type: **-----** Left Over amount: **-----** Add

Menu Items (= A CN Database Serving Type)**

	Name	Type	Code	Menu Item type	Servi...	Serving Type	Student Pl...	Adult / a l...	Total Plan...	Leftovers Added
↑ ↓	Scrambled Eggs	Recipe	J - 1		1.00	Serving (4 x 5 cut)(1.00-52.59g)	20	0	20	0
↑ ↓	Sausage Patty	Item	8922447		1.00	Each (1.025 oz)(1.00-29.06g)	20	0	20	0
↑ ↓	Pears, Sliced, light syrup	Item	480038		1.00	Scoop#8 (Breakfast)(1.00-121.5...	0	0	0	0
↑ ↓	Pears, Diced, light syrup	Item	480202		1.00	Scoop#8 (Breakfast)(1.00-127.8...	20	0	20	0
↑ ↓	Juice, 4 oz	Pattern	J3		1.00	Each(1.00-113.40g)	50	0	50	0
↑ ↓	Cinnamon Rolls, Homemade	Recipe	B - 1b		1.00	each(1.00-114.33g)	80	0	80	0
↑ ↓	Cereal, Assorted	Pattern	C3		1.00	Each(1.00-24.33g)	30	0	30	0
↑ ↓	Toast	Recipe	L - 1a		1.00	Slice(1.00-30.05g)	15	0	15	0

UOM Converter Nutrition Calculator Pre-Cost Detail Save Close Print

- Enter the number of planned student entrees, sides and condiments, etc in the Student Planned Servings box.
- Enter the number of planned adult and a la carte meals in the Adult/a la Carte box.
- The total of the student planned serving entrées should match the projected # of servings.

Editing Menus for Production Planning

NOTE: Districts that designate entrees as a menu item type will automatically add up the Planned # of Servings. Step 3 & 4 may be skipped.

Name: **Second Break, Fri Wk 2** Code: **SBW2D5**

Menu Planning **Food Based**

General Details

Menu Name: **Second Break, Fri Wk 2** Menu Code: **SBW2D5** Meal Type Name: **Breakfast**

Planned # of Servings: **80** Serving Location: **N** **Internal / Internal**

Age Group: **Grades 6-12 (Breakfast)**

Add Menu Item: **Item** Item/Recipe/Pattern

Inactive: ☐

Item: **N** Menu Item type:

Serving Size: Serving Type: Planned Servings: **Add**

Item Leftover: **N** Course: Portion Size: Serving Type: Left Over amount: **Add**

Menu Items (** = A CM Database Serving Type)

	Name	Type	Code	Menu Item type	Servi...	Serving Type	Student Pl...	Adult / a l...	Total Plan...	Leftovers Added
↑	Scrambled Eggs	Recipe	J - 1		1.00	Serving (4 x 5 cut)(1.00- 52.59g)	20	0	20	0
↓	Sausage Patty	Item	8922447		1.00	Each (1.025 oz)(1.00- 29.06g)	20	0	20	0
↑	Pears, Sliced, light syrup	Item	480038		1.00	Scoop#8 (Breakfast)(1.00-121.5...	0	0	0	0
↓	Pears, Diced, light syrup	Item	480202		1.00	Scoop#8 (Breakfast)(1.00-127.8...	20	0	20	0
↑	Juice, 4 oz	Pattern	J3		1.00	Each(1.00-113.40g)	50	0	50	0
↓	Cinnamon Rolls, Homemade	Recipe	B - 1b		1.00	each(1.00-114.33g)	80	0	80	0
↑	Cereal, Assorted	Pattern	C3		1.00	Each(1.00- 24.33g)	30	0	30	0
↓	Toast	Recipe	L - 1b		1.00	Slice(1.00- 20.05g)	12	0	12	0

UOM Converter Nutrition Calculator Pre-Cost Detail **Save** Close Print

8. Click "Save" to exit the menu planning section.

9. Click "OK".



Editing Patterns

Editing Patterns

The type of pattern is not displayed on the menu planning screen. The user must enter the edit section of the pattern to see what type of pattern is being used. The Grouping Mode states the pattern type.

Combo Pattern

The combo pattern allows for an entrée to include a side to create a single entrée. The nutritional analysis will be done on the two items as though it is a single entrée. The projected amounts will be the same for both items/recipes.

Lunch / Middle/High Tuesday - Lunch / Grades 7-12 (Lunch) / Serving location: Internal / 100 (# Of Servings) / Open

Production Record

Item / Recipe	Code	Portion	Serving Type	Projected S...	Item Mgmt type
Recipe Spaghetti and Meat Sauce (Ground)	D-35a	1.00 Cup(0.75-599.17g)	100	0	100
Recipe Broccoli Salad	E-17	1.00 Scoop#8(1.00-93.79g)	100	0	100
Item Bananas, Raw	9040 / 9040	1.00 small (6" to 6-7/8" long)	100	0	100
Item Cheese, Parmesan, Grated	1032 / 1032	1.00 OZ**(1.00-28.35g)	100	0	100
Pattern Chilled Fruit	1	1.00 Scoop#8(1.00-125.50g)	100	0	100
Pattern Milk	3	1.00 Cup(1.00-249.00g)	100	0	100
Pattern chicken nuggets w/roll	cnr	1.00 Serving(1.00-141.36g)	100	0	100

1. Edit the pattern to project the correct number of servings by clicking on "Edit" next to the pattern.

Pattern Creation **Food Based**

General Details

Pattern Name: chicken nuggets w/roll * Pattern Code: cnr * Public Name:

Grouping Mode: Combo

Add Items

Item / Recipe: Portion Size: Serving Type: **Add**

Pattern Ingredients

Type	Ingredient Name	Code	DN Code	Portion ...	Serving Type	Projected S...	Item Mgmt type
Item	Chicken Nuggets FC Bld	4883	102912	1.00	Serving (6 each)(1.00-84.00g)	100.00	Nutr & Inv
Recipe	Wheat Rolls	B-16c		1.00	Each(1.00-57.36g)	100.00	Nutr & Inv

Totals

Total # Of Servings: 100 *

Serving Size: Serving Type: Serving Description: Is Food Based: ☐ **Add**

Serving Details

Serving Size	Serving Type	Serving Description	Is Food Based
1.00	Serving		<input checked="" type="checkbox"/>

2. The total # of servings for the combo will be updated from the menu planning screen automatically. The items included in the combo will be updated with the new quantity.
3. Click "Save" to update projected quantities on the production record.

Batch Pattern

The batch pattern allows for multiple ingredients to be included in an entrée. The nutritional analysis will be done on the weighted average of the included ingredients. The projected amounts can vary between ingredients.

Lunch / Middle/High Tuesday - Lunch / Grades 7-12 (Lunch) /Serving location: Internal / 100 (# Of Servings) /Open

Production Record

Item	Recipe	Code	Portion	Serving Type	Projected S...	Item Mgmt type
Recipe	Spaghetti and Meat Sauce (Ground	D-35a	1.00	Cup(0.75-599.17g)	100	0
Recipe	Broccoli Salad	E-17	1.00	Scoop#8(1.00-93.79g)	100	0
Item	Bananas, Raw	9040 / 9040	1.00	small (6" to 6-7/8" long) ** (1.00-101.00g)	100	0
Item	Cheese, Parmesan, Grated	1032 / 1032	1.00	OZ** (1.00-28.35g)	100	0
Pattern	Chilled Fruit	1	1.00	Scoop#8(1.00-125.50g)	100	0
Pattern	Milk	3	1.00	Cup(1.00-249.00g)	100	0
Pattern	chicken nuggets w/roll	cnr	1.00	Serving(1.00-141.36g)	100	0
Pattern	Build your own wrap	wrap	1.00	Serving(1.00-239.90g)	100	0

1. Edit the pattern to project the correct number of servings by clicking on "Edit" next to the pattern.

Pattern Editor | Food Based

General Details

Pattern Name: Build your own wrap * Pattern Code: wrap * Public Name:

Grouping Mode: Batch

Add Items

Item / Recipe: N Portion Size: Serving Type: Projected Servings: Add

Type	Ingredient Name	Code	ON Code	Portion	Serving Type	Projected S...	Item Mgmt type
Item	Tomatoes,Red,Ripe,Raw,Year...	11529	11529	0.25	Cup (diced)(1.00-201.60g)	50.00	Nutr & Inv
Item	Cheese, Cheddar	1009	1009	2.00	Quince(1.00-28.35g)	100.00	Nutr & Inv
Item	Turkey Ham, Dk Meat, Smoked...	5600	5600	2.00	Slice (1.75 oz)(1.00-49.61g)	100.00	Nutr & Inv
Item	Tortillas,8tb or -Fry,Flr 12" 1...	18364B	18364	1.00	tortilla 12" (1.8 oz)(1.00-51.03g)	100.00	Nutr & Inv
Item	Lettuce, Iceberg (Ind Crisphe...	11252	11252	0.25	cup chopped(1.00-61.88g)	50.00	Nutr & Inv

Totals

Total # Of Servings: 100 *

Serving Size: Serving Type: Serving Description: Is Food Based: Add

Serving Details

Serving Size	Serving Type	Serving Description	Is Food Based
1.00	Serving		<input checked="" type="checkbox"/>

2. The total # of servings for the batch will be updated from the menu planning screen automatically. The items included in the batch will not be updated with the new quantity.
3. Enter the projected number of servings next to each item included in the batch.
4. Click "Save" to update projected quantities on the production record.

Printing Production Worksheet

Site Production

Close Edit Criteria Bulk Changes Save Day Nutrition Report

Calendar

January 2010

Production Day

Production Info For Day : 01/04/2010

Type	Item Name	Code \ CNCode	Serving Size	Serving Type	Student Planned Servings	Adults / a la Carte Planned Servings	Total Planned Servings
Breakfast / Second. Break. Wed Wk 2 / Grades 6-12 (Breakfast) /Serving location: Internal / 85 (# Of Servings) /Open							
Production Record							
Item	Brk Pizza - Sausage	8901142	1.00 Each (3 oz)(1.00-85.05g)		80	0	80
Item	Peaches, Diced, light syrup	442269	1.00 Scoop#8 (Breakfast)(1.00-125.21g)		20	0	20
Pattern	Juice, 4 oz	J3	1.00 Each(1.00-113.40g)		50	0	50
Pattern	Bagels	B1	1.00 Each(1.00-113.40g)		35	0	35
Pattern	Cereal, Assorted	C3	1.00 Each(1.00- 24.33g)		30	0	30
Recipe	Toast	J - 16	1.00 Slice(1.00-30.05g)		12	0	12
Pattern	Milk	M1	1.00 Each(1.00-226.80g)		86	0	86
Item	Cheese Cream Cups 1 oz	8701740	1.00 Each (1 oz)(1.00-28.35g)		35	0	35
Item	Jelly, Apple-Grape	4780576	1.00 Tablespoon(1.00-20.00g)		12	0	12
Lunch / HS Klein Line Wed Wk 2 / Grade 6-12 (lunch) /Serving location: Internal / 200 (# Of Servings) /Open							
Production Record							

1. Click on "Production Record" from the Production Day Screen.

Food Based Production Record Menu

General

Meal Pattern School Patterns Menu Name Second. Break. Fri Wk 2 FB Meal Type Breakfast

Planned # of Servings 80 FB Standard Type Enhanced Tot. Students Served

Tot. Adults Served Signature Offer vs. Serve ☒

Remarks Status Open Meal Preparation Site N Klein High School / 001

Food Based Product Record

Name	Age Group	Code	Type	Serving Type	Student Serving Size	Adult Serving Size	Student Planned Servings	Adults / a la Carte Planned Servings
Scrambled Eggs	Grades 7-12	J - 1	Recipe	Serving (4 x 5 cut)	1.00	1.00	20	0
Sausage Patty	Grades 7-12	8922447	Item	Each (1.025 oz)	1.00	1.00	20	0
Pears, Diced, light syrup	Grades 7-12	480202	Item	Scoop#8 (Breakfast)	1.00	1.00	20	0
(P-Juice, 4 oz) Juice, Orange, 4 fl oz	Grades 7-12	9005612	Item	Each (4 fl oz)	1.00	1.00	50	0
Cinnamon Rolls, Homemade	Grades 7-12	B - 1b	Recipe	each	1.00	1.00	80	0
(P-Cereal, Assorted) Cereal, Tootie Fruities .75 oz	Grades 7-12	9386120	Item	Each (0.75 oz)	1.00	1.00	20	0
(P-Cereal, Assorted) Cereal, Honey Graham Squares	Grades 7-12	9390726	Item	Each (1 oz)	1.00	1.00	7	0
(P-Cereal, Assorted) Cereal, Raisin Bran	Grades 7-12	9388749	Item	Each (1.25 oz)	1.00	1.00	3	0
Toast	Grades 7-12	J - 16	Recipe	Slice	1.00	1.00	12	0
(P-Milk) Milk, Chocolate 1/2 Pt, 1%	Grades 7-12	23740	Item	Carton 8 fl oz	1.00	1.00	45	0
(P-Milk) Milk, White, 1/2 Pt, 1%	Grades 7-12	23739	Item	Carton 8 fl oz	1.00	1.00	21	0
(P-Milk) Milk, Strawberry 1/2 Pt, 1%	Grades 7-12	23101	Item	Carton 8 fl oz	1.00	1.00	15	0
(P-Milk) Milk, Skim White, 1/2 pint	Grades 7-12	23731	Item	Carton 8 fl oz	1.00	1.00	5	0
Jelly, Apple-Grape	Grades 7-12	4780576	Item	Tablespoon	1.00	1.00	12	0
Sauce, Picante, bulk	Grades 7-12	3295516	Item	Ladle 1 Fl oz	1.00	1.00	20	0
Bacon, Turkey	Grades 7-12	8938129	Item	Slice (.59oz)	1.00	1.00	100	0
Scrambled Eggs	Grades 7-12	J - 1	Recipe	Serving (4 x 5 cut)	1.00	1.00	20	0

Finished Pick List Transfer Guide Save Close Print

2. Click on the "Print" button to print a Production Usage Report. This report may be used in the production kitchen to assist in preparing the daily menu.

3. Click on "Open"

Production Record Nutrition Report



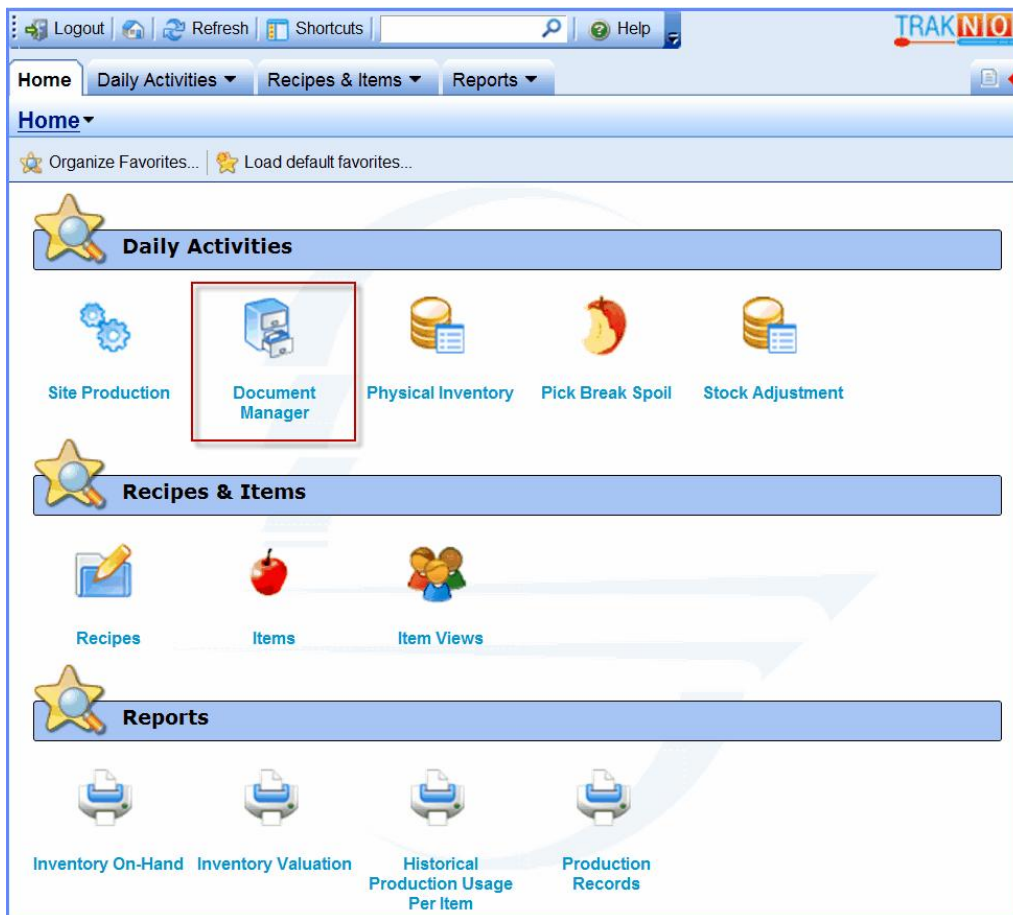
Meal Type: Lunch
Meal Preparation Site: Menu Analysis
Catering:
Offer Vs. Serve: No
Serving Location: Internal
Special Diet:
Signature:
Remarks:
Reference Menu Name: ELLW1D1

Number of Servings by Groups						Date: 03/03/08													
Planned # of Servings: 300						Total # of Servings: 0													
Tot. Students Served :						Tot. Adults Served :													
PLANNING SECTION - BASED ON SITE PRODUCTION FORECAST						DOCUMENTATION SECTION - BASED ON ACTUAL SERVINGS RECORDED													
Item / Recipe	Code	Menu Item Type	Total Planned Servings	Serving Type	Serving Description	Amount or Measure Inventory or Recipe Unit	Left Over: Used	Actual Portions Prepared	Servings Left Over	Left Over Use	Discard	Actual Student Servings	Actual Adult and ala Carte	Comment	Temp	Temp 1" (1st Batch)	Temp 2" (2nd Batch)	Temp 3" (3rd Batch)	Holding Temp 1" of 1st Batch
Roast Beef Sandwich	Elavboas	Entree	100	1 Each			0												
An Jus for French Dip	Elavyn	Condiment	100	1 Serving	2 oz cup		0												
Chicken Drumsticks Southern	Elchidr	Entree	200	1 Serving	4 Drumsticks = 1 serving		0												
Rhodes Roll	Elrhds	Side	200	1 Each	1 Roll		0												
Fruit,Bananas	4250015	Side	100	1 Small (6" to 7")		22 1/4 Pound	0												
Fruit,Appleauce,Swissmnd Crumbl	9900024	Side	100	1 Scoop#10	#10 Scoop or 3/8 cup	3 1/8 Cms #10	0												
Infantry Fries	Elifryinf	Side	100	1 Serving(3 oz)	1 serving = 3 ounces		0												
Catup	215270	Condiment	100	1.5 Ounce	Based on: Standard unit of measure	1 1/3 Cms #10	0												
Fry Sauce	Elifrysa	Condiment	100	1.5 Ounce	1 oz. serving		0												
(P-Milk Elementary) Milk,1%	4450475	Side	50	1 Carton (8 oz)		50 Containers	0												
(P-Milk Elementary) Milk,2%	4450500	Side	50	1 Carton (8 oz)	Based on: Standard unit of measure	54 3/8 Containers	0												
(P-Milk Elementary) Milk,Chocolate,1%	4450520	Side	100	1 Carton (8 oz)	Based on: Standard unit of measure	108 1/4 Containers	0												
Allergens:	Tree Nuts = N	Peanuts = P	Dairy = D	Soy = S	Wheat = W	Eggs = E	Fish = F	Shellfish = SF											

4. The Site Production Usage Report serves as a useful tool in the production kitchen. Employees may fill in the appropriate amounts after preparation and serving. The manager will use this form to enter the information after serving is complete.

Notes:

This section will demonstrate how to place orders based on production (forecasted meal numbers), add items to orders and utilize item lists and shopping lists.

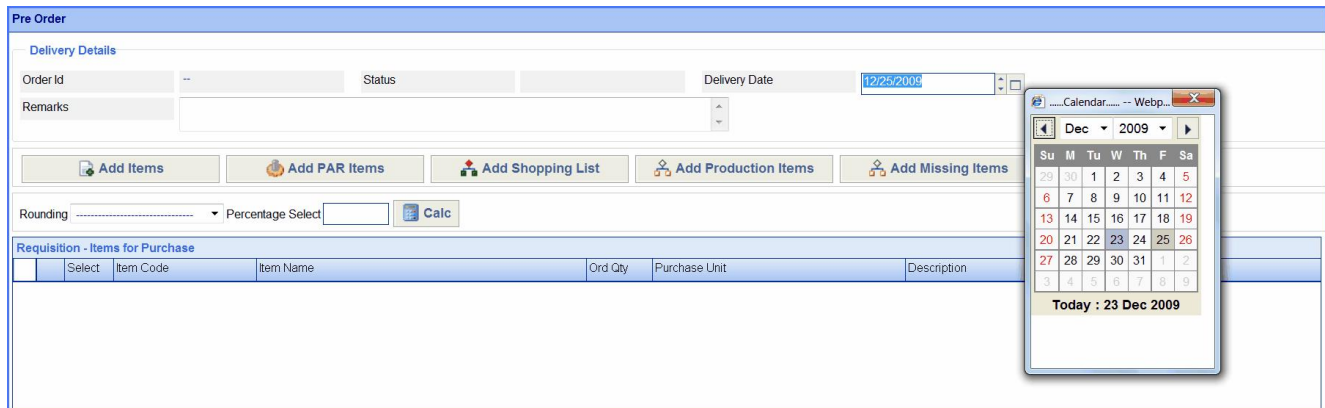


1. Click on "Document Manager" on the Home Page (the Home Page may look slightly different, as each district can customize the Home Page favorites).

Document Manager										
Close [X] Approve [X] Submit [X] Transfer All [X] Select All [X] Unselect All [X] Bulk Change [X]										
Requisition [X] Purchase Order [X] Transfer [X] Receiving [X] Preorder [X] Supply Requisition [X]										
	View	Del	Edit	Document Type	Supplier	Destination Site	Document Status	Due Date	Document Id	Ref. Order Id
<input type="checkbox"/>				Purchase Order	Labatt Food Service	Klein High School	Manage By District	11/25/2009	190131	
<input type="checkbox"/>				Supply Requisition	Commodity Warehouse	Klein High School	On Order	12/18/2009	190146	
<input type="checkbox"/>				Transfer	Warehouse	Klein High School	Wait2BReceived	01/01/2010	190154	*
<input type="checkbox"/>				Purchase Order	Blue Bell Creameries, L.P.	Klein High School	Wait2BReceived	12/03/2009	190161	
<input type="checkbox"/>				Purchase Order	Labatt Food Service	Klein High School	Manage By District	01/01/2010	190167	
<input type="checkbox"/>				Transfer	Warehouse	Klein High School	Wait2BReceived	12/05/2009	190174	*
<input type="checkbox"/>				Transfer	Warehouse	Klein High School	Wait2BReceived	12/03/2009	190181	*
<input type="checkbox"/>				Supply Requisition	Warehouse	Klein High School	Rejected	12/06/2009	190184	
<input type="checkbox"/>				Purchase Order	Labatt Food Service	Klein High School	Manage By District	12/06/2009	190185	
<input type="checkbox"/>				Supply Requisition	Commodity Warehouse	Klein High School	On Order	01/25/2010	190200	
<input type="checkbox"/>				Transfer	Commodity Warehouse	Klein High School	Wait2BReceived	01/29/2010	190204	*

2. A preorder must be completed to order items for the school to be delivered from a vendor, warehouse, etc.

3. Click on "Preorder" to enter the preorder screen.



4. Click on calendar box next to the "Delivery Date" box. This will pull up a calendar. Click on the specific date the delivery is to be scheduled for.
5. The items needed for production are now ready to be entered. There are several ways of adding items to the order.

Add Items

Add Items

1. Click on “Add Items” to add individual items.



2. The preorder item screen will appear.

PreOrderItem -- Webpage Dialog

Filter By: Item Name Contains [] Go Filter Class List Location

Item Name	Item Code	Description
Bagel, blueberry, sliced	9230055	72/4 Oz Bakecrafters 649
Bagel, cinnamon raisin, sliced	9230082	72/4 Oz Bakecrafters 648
Bagel, honeywheat sliced	9230075	72/4 Oz Bakecrafters 658
Bagel, wholegrain sliced	9230080	72/4 Oz Bakecrafters 664
Baking Powder Clabber Girl	6397517	10# Clabber UPC355
Baking Soda Hytop	6415681	12/1# Diamond Crys UPC58000
Ball, 1/2", Condiment Pump	W15348	Each
Bananas, Petite (approx 2.85 oz)	9812215	150 Ct
Bank Bag, Large	W14052	100/box

Page: 1 of 18 Total Found: 869

Item Name	Item Code	Description
Applesauce	9911276	6/#10 Blue Ribbon #85647
Bagel, plain, sliced	9230033	72/4 Oz Bakecrafters 647

Page: 1 Of: 1 Total Found: 2

Apply Close

3. Items may be selected using the filter or by searching for them alphabetically.
4. To add items to the list, click on the blue down arrow to the left of the item. Once all items needed are shown in the bottom drop box, click “Apply” to add the items to the preorder.

Add Par Items

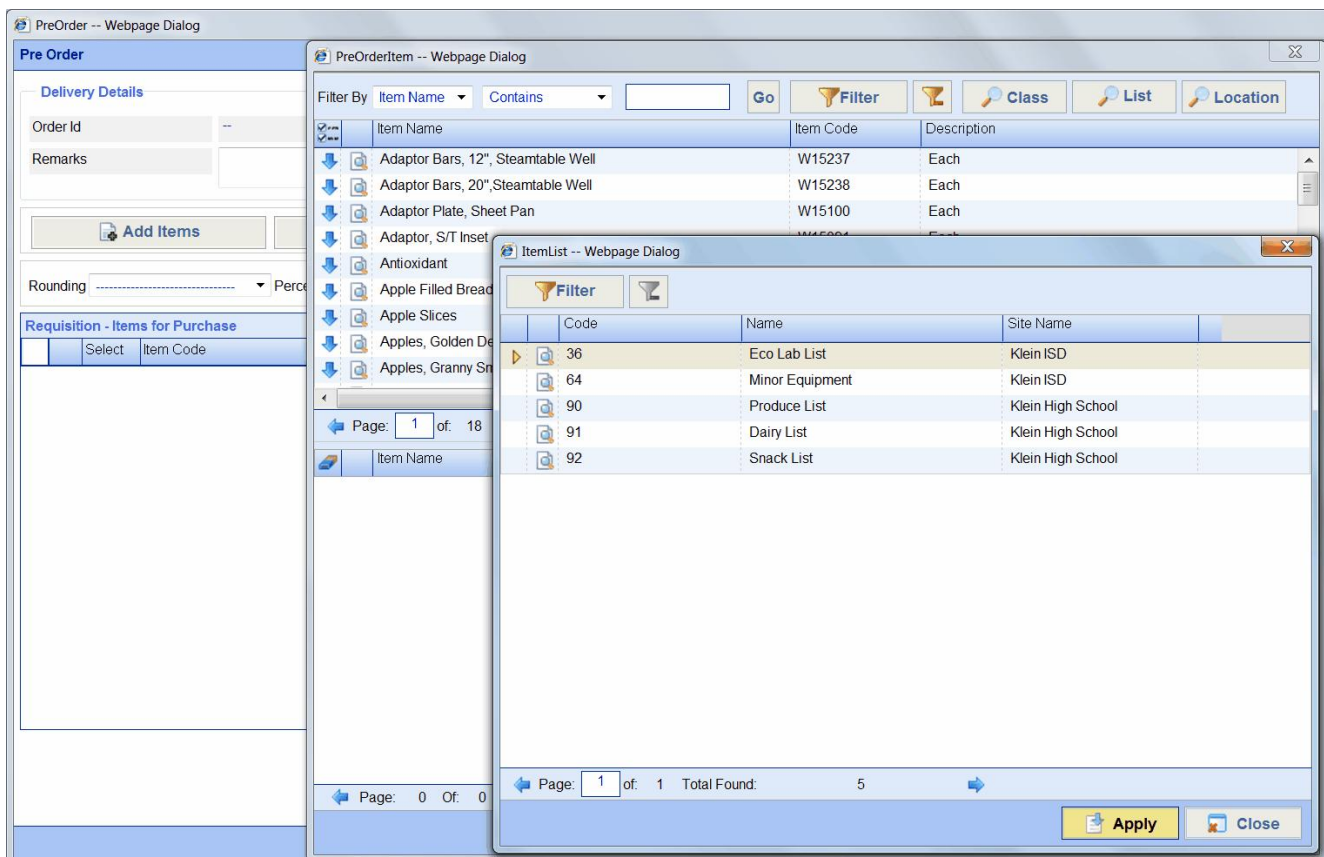
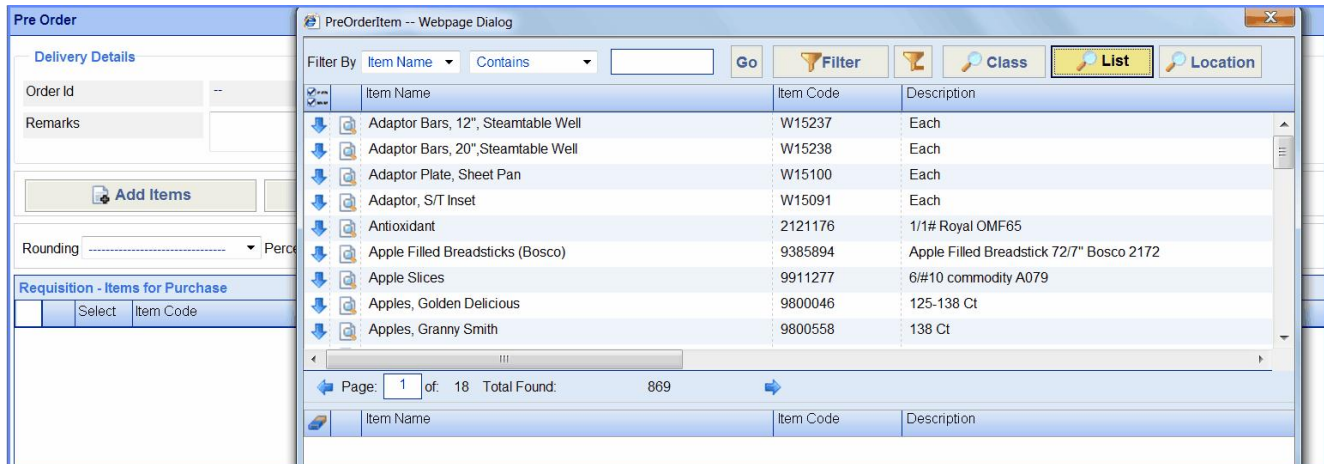


1. Click on “Add PAR Items”
2. This button adds items that are preset to a minimum par level at the site.

Add Items

Add Item List

Item lists can be used to group items such as dairy, produce, ice cream, etc. without a specified quantity. This is located within the "Add Items" link.



1. Click on "Add Items" then "List" to add items from a specific list that has previously been created.
2. Highlight the list by clicking on it. Once highlighted, click "Apply" to add the list to the "Add Items" screen. Click "Apply" again to add the list to the preorder.

PreOrder -- Webpage Dialog

Pre Order

Delivery Details

Order Id: -- Status: -- Delivery Date: 12/25/2009

Remarks: --

Rounding: -- Percentage Select:

Requisition - Items for Purchase

Select	Item Code	Item Name	Ord Qty	Purchase Unit	Description
<input type="checkbox"/>	E15651	Encompass Heavy Duty Cleaner	0.00	1 Gl / Gl - 4 Gl / Case	4/1/Gal
<input type="checkbox"/>	E17111	Greasecutter Plus	0.00	1 Gl / Gl - 4 Gl / Case	4/1 Gal
<input type="checkbox"/>	E11817	Jet Dry	0.00	1 Gl / Gl - 4 Gl / Case	4/1 Gal/Case
<input type="checkbox"/>	E15362	Landry-Brite	0.00	1 Cs / Cs - 1 Cs / Case	Case
<input type="checkbox"/>	E12021	Lime-A-Way	0.00	1 Gl / Gl - 4 Gl / Case	4/1 Gal
<input type="checkbox"/>	E11288	Pan Dandy	0.00	1 Pl / Pl - 1 Pl / Pail	Pail
<input type="checkbox"/>	E15580	Sanitizer Plus	0.00	1 Con / Con - 9 Con / Case	9/800 Ml/Case
<input type="checkbox"/>	E10215	Solid Insure	0.00	1 Con / Con - 4 Con / Case	4/Cont/Case
<input type="checkbox"/>	E18945	Surgi Bac	0.00	1 Gl / Gl - 4 Gl / Case	4/1 Gal/Case test

- The items from the highlighted list have now been added to the preorder.
- Edit the amount needed by clicking in the quantity column (Ord Qty) for each item. If a particular item is not needed, click on the delete icon next to the item to delete it or leave as zero (0) quantity and the item will not be ordered.

Add Items

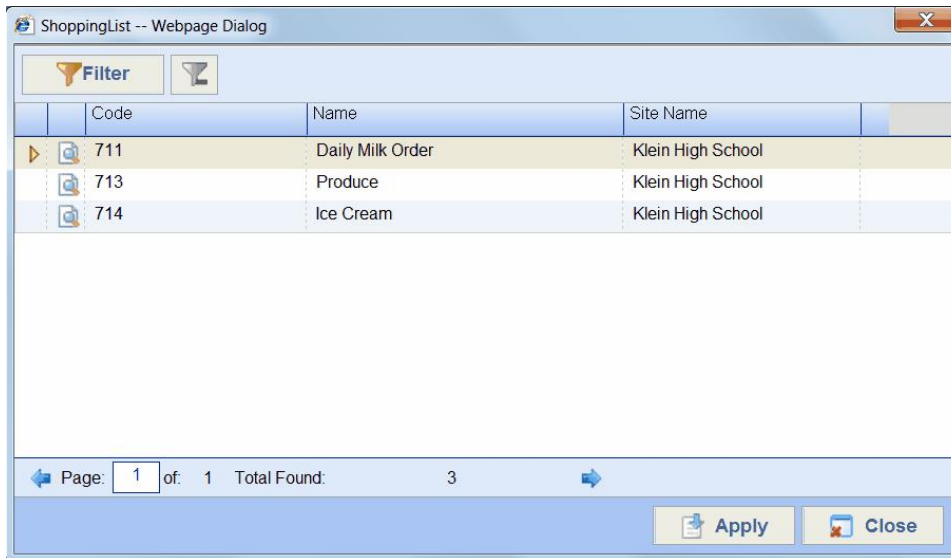
Add Shopping List







- Click on “Add Shopping List” to add items for a specific shopping list that has previously been created. Shopping lists can be used to group items such as dairy, produce, ice cream, etc. with a specified quantity.



ShoppingList -- Webpage Dialog

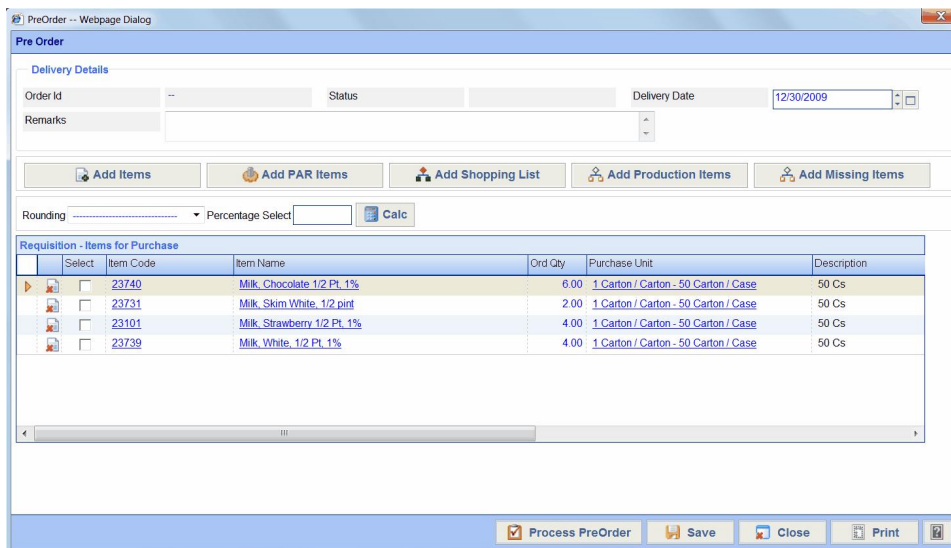
Filter

	Code	Name	Site Name
	711	Daily Milk Order	Klein High School
	713	Produce	Klein High School
	714	Ice Cream	Klein High School

Page: 1 of 1 Total Found: 3

Apply Close

- Highlight the Daily Milk Order by clicking on it. Once highlighted, click “Apply” to add the list to the preorder.








PreOrder -- Webpage Dialog

Pre Order

Delivery Details

Order Id: -- Status: -- Delivery Date: 12/30/2009

Remarks: --

Rounding: -- Percentage Select: -- Calc

Requisition - Items for Purchase

Select	Item Code	Item Name	Ord Qty	Purchase Unit	Description
	23740	Milk, Chocolate 1/2 Pt. 1%	6.00	1 Carton / Carton - 50 Carton / Case	50 Cs
	23731	Milk, Skim White, 1/2 pint	2.00	1 Carton / Carton - 50 Carton / Case	50 Cs
	23101	Milk, Strawberry 1/2 Pt. 1%	4.00	1 Carton / Carton - 50 Carton / Case	50 Cs
	23739	Milk, White, 1/2 Pt. 1%	4.00	1 Carton / Carton - 50 Carton / Case	50 Cs

Process PreOrder Save Close Print

- The dairy items have now been added to the preorder. Edit the amount needed by clicking in the quantity column for each item. If a particular item is not needed, click on the delete icon next to the item to delete it or leave as zero (0) quantity and the item will not be ordered

Add Production Items

Ordering from production allows an order to be placed based on the forecasted/projected servings in production planning. Orders can be created by vendor and/or supplier for a specified date range.

[Add Items](#)
[Add PAR Items](#)
[Add Shopping List](#)
[Add Production Items](#)
[Add Missing Items](#)

1. Click on “Add Production Items” to add specific supplier items based on menu dates.




[illegible]


2. Click on the magnifying glass to select a specific supplier.
3. Highlight supplier name.
4. Click "Apply".


Order Criteria -- Webpage Dialog




Preorder Criteria

General Details

Supplier: N ▾ Labatt Food Service    Labatt Food Service / 0100

From Date: 12/28/2009  *

To Date: 01/04/2010  *

 **Apply**  **Close** 

5. Enter the specific date range for the production items to be pulled into the preorder.
6. Click "Apply".

Add Items

PreOrder -- Webpage Dialog

Pre Order

Delivery Details

Order Id: -- Status: -- Delivery Date: 12/30/2009

Remarks: --


Rounding: -- Percentage Select:

Requisition - Items for Purchase

Select	Item Code	Item Name	Ord Qty	Purchase Unit	Description
	<input type="checkbox"/> 9385894	Apple Filled Breadsticks (Bosco)	1.11	1 Ea / Ea - 72 Ea / Case	
	<input type="checkbox"/> 9800558	Apples, Granny Smith	0.64	1 Ea / Ea - 138 Ea / Case	
	<input type="checkbox"/> 9800055	Apples, Red Delicious	4.04	1 Ea / Ea - 138 Ea / Case	
	<input type="checkbox"/> 8938129	Bacon, Turkey	1.24	1 Pk / Pk - 12 Pk / Case(c)	
	<input type="checkbox"/> 9230055	Bagel, blueberry, sliced	0.38	1 Ea / Ea - 72 Ea / Case	
	<input type="checkbox"/> 9230082	Bagel, cinnamon raisin, sliced	0.21	1 Ea / Ea - 72 Ea / Case	
	<input type="checkbox"/> 9230075	Bagel, honeywheat sliced	0.38	1 Ea / Ea - 72 Ea / Case	
	<input type="checkbox"/> 9230033	Bagel, plain, sliced	0.46	1 Ea / Ea - 72 Ea / Case	
	<input type="checkbox"/> 9230080	Bagel, wholegrain sliced	0.21	1 Ea / Ea - 72 Ea / Case	
	<input type="checkbox"/> 9812215	Bananas, Petite (approx 2.85 oz)	4.42	1 Ea / Ea - 150 Ea / Case	
	<input type="checkbox"/> 1447580	Beans, Green, Canned	2.51	1 #10 / #10 - 6 #10 / Case	
	<input type="checkbox"/> 1549500	Beans, Pinto	1.20	1 #10 / #10 - 6 #10 / Case	
	<input type="checkbox"/> 8959033	Beef BBQ Chopped (4/5#)	0.99	1 Con / Con - 4 Con / Case	

7. The production items have now been added to the preorder. The amounts needed may be edited by clicking in the quantity column for each item. If a particular item is not needed, click on the delete icon next to the item to delete it. If "---" is displayed in the ordered quantity column, a single purchase unit will be ordered. This is not to be mistaken as a zero.
8. Additional items may be added to the order by using any of the ordering features.
9. Click "Process PreOrder" to generate requisitions for items.

Message from webpage

 Process Result:
Order Id 190319 Type Requisition Order Created
Order Id 190320 Type Purchase Order Created

10. The Process Result screen will appear and list all orders created. The orders are automatically grouped according to vendor.

Document Manager											
Close [X] Approve [X] Submit [X] Transfer All [X] Select All [X] Unselect All [X] Bulk Change [X]											
Requisition [X] Purchase Order [X] Transfer [X] Receiving [X] Preorder [X] Supply Requisition [X]											
	View	Del	Edit	Document Type	Supplier	Destination Site	Document Status	Due Date	Document Id	Ref. Order Id	Creation Date
<input type="checkbox"/>				Purchase Order	Labatt Food Service	Klein High School	Manage By District	01/01/2010	190167		12/01/2009
<input type="checkbox"/>				Transfer	Warehouse	Klein High School	Wait2BReceived	12/05/2009	190174	*	12/03/2009
<input type="checkbox"/>				Transfer	Warehouse	Klein High School	Wait2BReceived	12/03/2009	190181	*	12/03/2009
<input type="checkbox"/>				Supply Requisition	Warehouse	Klein High School	Rejected	12/06/2009	190184		12/04/2009
<input type="checkbox"/>				Purchase Order	Labatt Food Service	Klein High School	Manage By District	12/06/2009	190185		12/04/2009
<input type="checkbox"/>				Supply Requisition	Commodity Warehouse	Klein High School	On Order	01/25/2010	190200		12/07/2009
<input type="checkbox"/>				Transfer	Commodity Warehouse	Klein High School	Wait2BReceived	01/29/2010	190204	*	12/07/2009
<input type="checkbox"/>				Supply Requisition	Commodity Warehouse	Klein High School	On Order	12/09/2009	190206		12/07/2009
<input type="checkbox"/>				Purchase Order	Blue Bell Creameries, L.P.	Klein High School	Manage By District	12/11/2009	190248		12/11/2009
<input type="checkbox"/>				Transfer	Warehouse	Klein High School	Wait2BReceived	12/13/2009	190258	*	12/11/2009
<input type="checkbox"/>				Transfer	Warehouse	Klein High School	Wait2BReceived	12/13/2009	190262	*	12/11/2009
<input type="checkbox"/>				Transfer	Warehouse	Klein High School	Wait2BReceived	12/18/2009	190276	*	12/16/2009
<input type="checkbox"/>				Requisition		Klein High School	Pending	12/23/2009	190302		12/21/2009
<input type="checkbox"/>				Transfer		Klein High School	Wait2BReceived	12/28/2009	190303		12/21/2009
<input type="checkbox"/>				Requisition		Klein High School	Pending	12/25/2009	190314		12/23/2009
<input type="checkbox"/>				Requisition		Klein High School	Pending	12/30/2009	190317		12/28/2009
<input type="checkbox"/>				Requisition		Klein High School	Pending	12/30/2009	190319		12/28/2009
<input type="checkbox"/>				Purchase Order	Schepps Dairy	Klein High School	Draft	12/30/2009	190320		12/28/2009

11. Upon returning to the Document Manager screen, all the orders submitted can be viewed.

Purchase Order - Items to Purchase									
Item Code	Supplier Code	Item Name	Ord Qty	Purchase Unit	Tot UU Ord	Pur Price \$	UU Price \$	Ext C	
22932	22932	Milk, 1 % Choc. Bottle	7.00	1 Btl / Btl - 20 Btl / Case	140.00	12.60	0.63000		
21317	21317	Milk, 2 % White, Bottle	5.00	1 Btl / Btl - 20 Btl / Case	100.00	12.60	0.63000		
21289	21289	Milk, Buttermilk	10.00	1 Carton / Carton - 1 Carton / Carton	10.00	1.57	1.57000		
23740	23740	Milk, Chocolate 1/2 Pt. 1%	52.00	1 Carton / Carton - 50 Carton / Case	2600.00	11.00	0.22000		
23731	23731	Milk, Skim White, 1/2 pint	7.00	1 Carton / Carton - 50 Carton / Case	350.00	11.00	0.22000		
23101	23101	Milk, Strawberry 1/2 Pt. 1%	11.00	1 Carton / Carton - 50 Carton / Case	550.00	11.00	0.22000		
23739	23739	Milk, White, 1/2 Pt. 1%	19.00	1 Carton / Carton - 50 Carton / Case	950.00	11.00	0.22000		

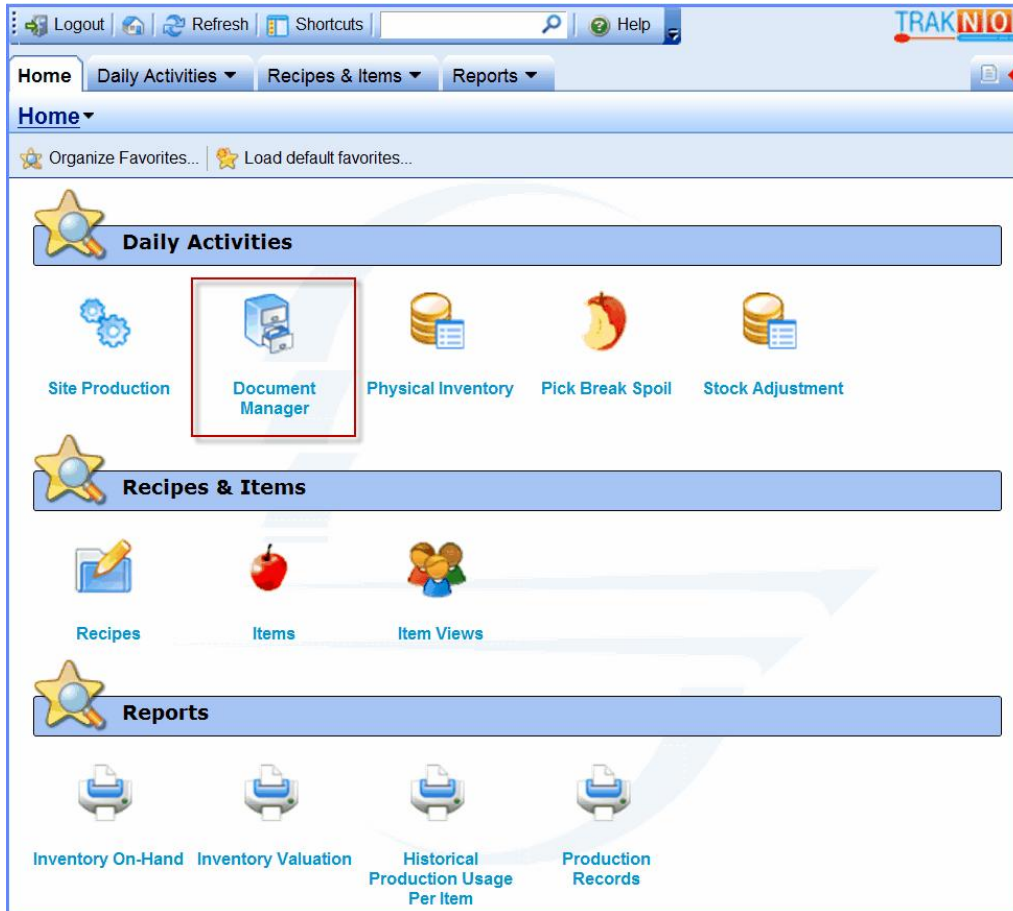
12. Any order that has a document status “draft” may be edited. Additional items may be added or deleted.

Once order is ready, click “Approve” to process order.

13. Once the order has been processed, the Document Status column will read “Wait2BReceived”.

Notes:

This section will demonstrate how to receive orders that have been placed.



1. Click on "Document Manager" on the Home Page (the Home Page may look slightly different, as each district can customize the Home Page favorites).

Document Manager												
<input type="button" value="Close"/> <input checked="" type="checkbox"/> Approve <input checked="" type="checkbox"/> Submit <input checked="" type="checkbox"/> Transfer All <input type="button" value="Select All"/> <input type="button" value="Unselect All"/> <input type="button" value="Bulk Change"/>												
<input type="button" value="Requisition"/> <input type="button" value="Purchase Order"/> <input type="button" value="Transfer"/> <input checked="" type="button" value="Receiving"/> <input type="button" value="Preorder"/> <input type="button" value="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"/>				Transfer	Warehouse	Klein High School	Wait2BReceived	12/13/2009	190262	*	12/11/2009	
<input type="checkbox"/>				Transfer	Warehouse	Klein High School	Wait2BReceived	12/18/2009	190276	*	12/16/2009	
<input type="checkbox"/>				Requisition		Klein High School	Pending	12/23/2009	190302		12/21/2009	
<input type="checkbox"/>				Transfer	Klein High School	Wunderlich Intermediate	Wait2BReceived	12/28/2009	190303		12/21/2009	
<input type="checkbox"/>				Requisition		Klein High School	Pending	12/25/2009	190314		12/23/2009	
<input type="checkbox"/>				Requisition		Klein High School	Pending	12/30/2009	190317		12/28/2009	
<input type="checkbox"/>				Requisition		Klein High School	Pending	12/30/2009	190319		12/28/2009	
<input type="checkbox"/>				Purchase Order	Schepps Dairy	Klein High School	Draft	12/30/2009	190320		12/28/2009	
<input type="checkbox"/>				Supply Requisition	Warehouse	Klein High School	On Order	12/30/2009	190321		12/28/2009	
<input type="checkbox"/>				Purchase Order	Schepps Dairy	Klein High School	Wait2BReceived	01/04/2010	190323		12/29/2009	

2. Highlight the order to be received and click on "Receiving".
3. An Order that is ready to be received will read "Wait2BReceived" in the Document Status column.

ReceivingOrder -- Webpage Dialog

Order Lines

General Details

Vendor	Schepps Dairy / 0800	Received Date	01/04/2010	Invoice Number	
Order Id	--	Status	Draft	Ordered Total Qty	16
Ordered Total Cost \$	176.0000	Received Total Qty	16	Received Total Cost \$	176.0000

Received Items - Received Items

Item Code	Supplier Code	Item Name	Rcv Qty	Rcv UOM	Rcv Price \$	Rcv Tot \$	Rjct Qty	Reason
23740	23740	Milk, Chocolate 1/2 Pt. 1%	6.00	1 Carton / Carton - 50 Carton / Case	11.0000	66.0000	--	
23731	23731	Milk, Skim White, 1/2 pint	2.00	1 Carton / Carton - 50 Carton / Case	11.0000	22.0000	--	
23101	23101	Milk, Strawberry 1/2 Pt. 1%	4.00	1 Carton / Carton - 50 Carton / Case	11.0000	44.0000	--	
23739	23739	Milk, White, 1/2 Pt. 1%	4.00	1 Carton / Carton - 50 Carton / Case	11.0000	44.0000	--	

- Enter the invoice number from the delivery ticket/shipping document.
- Edit any item that either did not get shipped or the amount varies from the original order in the "Rcv Qty" column. When the received quantity is changed, the Received Total Qty and Received Total Cost \$ fields will reflect this change.

Received Items - Received Items													
Rcv Qty	Rcv UOM	Rcv Price \$	Rcv Tot \$	Rjct Qty	Reason	Remarks	FMV \$	Del Fee \$	Proc Fee \$	Brok Fee \$	Stor Fee \$	Tot UU Rcv	Ord Qty
6.00	1 Carton / Carton - 50 Carton / Case	11.0000	66.0000	--			--	--	--	--	--	300.00	6.00
2.00	1 Carton / Carton - 50 Carton / Case	11.0000	22.0000	--			--	--	--	--	--	100.00	2.00
4.00	1 Carton / Carton - 50 Carton / Case	11.0000	44.0000	--			--	--	--	--	--	200.00	4.00
4.00	1 Carton / Carton - 50 Carton / Case	11.0000	44.0000	--			--	--	--	--	--	200.00	4.00

- Additional details regarding the delivery such as; remarks, FMV \$, delivery fee, etc. may be entered.
- Once all items ordered have been verified that they are received, click "Approve" to approve the delivery and close the document.
- The order received will now be removed from view in the Document Manager screen.

Blank Receiving

Blank receiving is receiving products that do not have a prior order for them. For example, milk and pizza, generally these vendors/suppliers drop off the product without an order being placed. Receiving these products in will add them to the perpetual inventory; which will enable them to be used in production.

Document Manager												
Close Approve Submit Transfer All Select All Unselect All Bulk Change												
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	Invo
<input type="checkbox"/>				Transfer	Warehouse	Klein High School	Wait2BReceived	01/01/2010	190154	*	11/30/2009	
<input type="checkbox"/>				Purchase Order	Blue Bell Creameries, L.P.	Klein High School	Wait2BReceived	12/03/2009	190161		12/01/2009	
<input type="checkbox"/>				Purchase Order	Labatt Food Service	Klein High School	Manage By District	01/01/2010	190167		12/01/2009	
<input type="checkbox"/>				Transfer	Warehouse	Klein High School	Wait2BReceived	12/05/2009	190174	*	12/03/2009	
<input type="checkbox"/>				Transfer	Warehouse	Klein High School	Wait2BReceived	12/03/2009	190181	*	12/03/2009	
<input type="checkbox"/>				Supply Requisition	Warehouse	Klein High School	Rejected	12/06/2009	190184		12/04/2009	
<input type="checkbox"/>				Purchase Order	Labatt Food Service	Klein High School	Manage By District	12/06/2009	190185		12/04/2009	
<input type="checkbox"/>				Supply Requisition	Commodity Warehouse	Klein High School	On Order	01/25/2010	190200		12/07/2009	
<input type="checkbox"/>				Transfer	Commodity Warehouse	Klein High School	Wait2BReceived	01/29/2010	190204	*	12/07/2009	
<input type="checkbox"/>				Supply Requisition	Commodity Warehouse	Klein High School	On Order	12/09/2009	190206		12/07/2009	

1. From the document manager screen, click on "Receiving". Do not have any orders, requisitions, etc highlighted.

Order Criteria -- Webpage Dialog

Receiving Order Criteria

General Details

Supplier N Schepps Dairy Schepps Dairy / 0600

From Date 12/29/2009

To Date 12/29/2009

Apply Close

2. Enter supplier name and date of delivery.
3. Click "Apply"




4. Click "OK". No orders will be found since there has not been a pre-order done for the specific supplier.

Blank Receiving

Order Lines

General Details

Vendor	Schepps Dairy / 0600	Received Date	12/29/2009	Invoice Number	
Order Id	--	Status		Ordered Total Qty	0
Ordered Total Cost \$	0.0000	Received Total Qty	0	Received Total Cost \$	0.0000



Received Items - Received Items

Item Code	Supplier Code	Item Name	Rcv Qty	Rcv UOM	Rcv Price \$	Rcv Tot \$	Rjct Qty	Reason


5. Enter the invoice number from the delivery ticket/shipping document.
6. Add items that are received. Items may be added using the "Add Items" feature.

ReceivingOrder -- Webpage Dialog

Order Lines





General Details

Vendor	Schepps Dairy / 0600	Received Date	12/29/2009	Invoice Number	
Order Id	--	Status		Ordered Total Qty	0
Ordered Total Cost \$	0.0000	Received Total Qty	0	Received Total Cost \$	0.0000



Received Items - Received Items

Item Code	Supplier Code	Item Name	Rcv Qty	Rcv UOM	Rcv Price \$	Rcv Tot \$	Rjct Qty	Reason
23740	23740	Milk_Chocolate 1/2 Pt. 1%	0.00	1 Carton / Carton - 50 Carton / Case	11.0000	0.0000	--	
23731	23731	Milk_Skim White 1/2 pint	0.00	1 Carton / Carton - 50 Carton / Case	11.0000	0.0000	--	
23101	23101	Milk_Strawberry 1/2 Pt. 1%	0.00	1 Carton / Carton - 50 Carton / Case	11.0000	0.0000	--	
23739	23739	Milk_White 1/2 Pt. 1%	0.00	1 Carton / Carton - 50 Carton / Case	11.0000	0.0000	--	

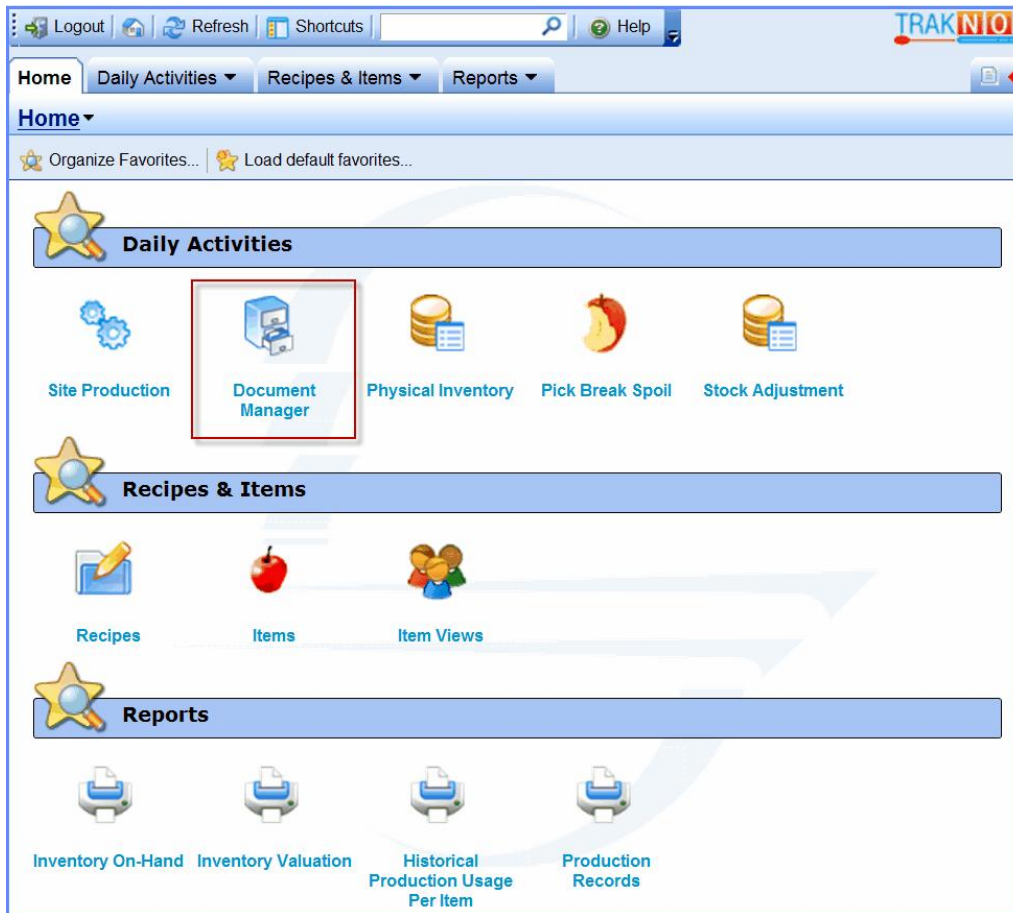





7. Enter the quantity in the "Rcv Qty" column.

Received Items - Received Items													
Rcv Qty	Rcv UOM	Rcv Price \$	Rcv Tot \$	Rjct Qty	Reason	Remarks	FMV \$	Del Fee \$	Proc Fee \$	Brok Fee \$	Stor Fee \$	Tot UU Rcv	Ord Qty
0.00	1 Carton / Carton - 50 Carton / Case	11.0000	0.0000	--			--	--	--	--	--	0.00	0.00
0.00	1 Carton / Carton - 50 Carton / Case	11.0000	0.0000	--			--	--	--	--	--	0.00	0.00
0.00	1 Carton / Carton - 50 Carton / Case	11.0000	0.0000	--			--	--	--	--	--	0.00	0.00
0.00	1 Carton / Carton - 50 Carton / Case	11.0000	0.0000	--			--	--	--	--	--	0.00	0.00

8. Additional details regarding the delivery such as; remarks, FMV \$, delivery fee, etc. may be entered.
9. Once all items ordered have been verified that they are received, click "Approve" to approve the delivery and close the document.
10. The order received will now be removed from view in the Document Manager screen.

This section will demonstrate how transfers are completed.



1. Click on "Document Manager" on the Home Page (the Home Page may look slightly different, as each district can customize the Home Page favorites).

Transfers from Warehouse

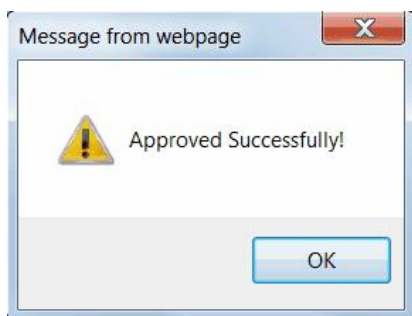
Transfers from Warehouse

Document Manager												
Close Approve Submit Transfer All Select All Unselect All Bulk Change												
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	Inv
<input type="checkbox"/>				Purchase Order	Schepps Dairy	Klein High School	Wait2BReceived	11/27/2009	190125		11/25/2009	
<input type="checkbox"/>				Purchase Order	Labatt Food Service	Klein High School	Manage By District	11/25/2009	190131		11/25/2009	
<input type="checkbox"/>				Supply Requisition	Commodity Warehouse	Klein High School	On Order	12/18/2009	190146		11/25/2009	
<input checked="" type="checkbox"/>				Transfer	Warehouse	Klein High School	Wait2BReceived	01/01/2010	190154 *		11/30/2009	
<input type="checkbox"/>				Purchase Order	Blue Bell Creameries, L.P.	Klein High School	Wait2BReceived	12/03/2009	190161		12/01/2009	
<input type="checkbox"/>				Purchase Order	Labatt Food Service	Klein High School	Manage By District	01/01/2010	190167		12/01/2009	
<input type="checkbox"/>				Supply Requisition	Warehouse	Klein High School	Rejected	12/06/2009	190184		12/04/2009	
<input type="checkbox"/>				Purchase Order	Labatt Food Service	Klein High School	Manage By District	12/06/2009	190185		12/04/2009	
<input type="checkbox"/>				Supply Requisition	Commodity Warehouse	Klein High School	On Order	01/25/2010	190200		12/07/2009	
<input type="checkbox"/>				Transfer	Commodity Warehouse	Klein High School	Wait2BReceived	01/29/2010	190204 *		12/07/2009	

1. A transfer will display the warehouse as a supplier and the document status will display "Wait2BReceived".
2. Click on the transfer to highlight it.
3. Click on "Receiving" to open the receiving document

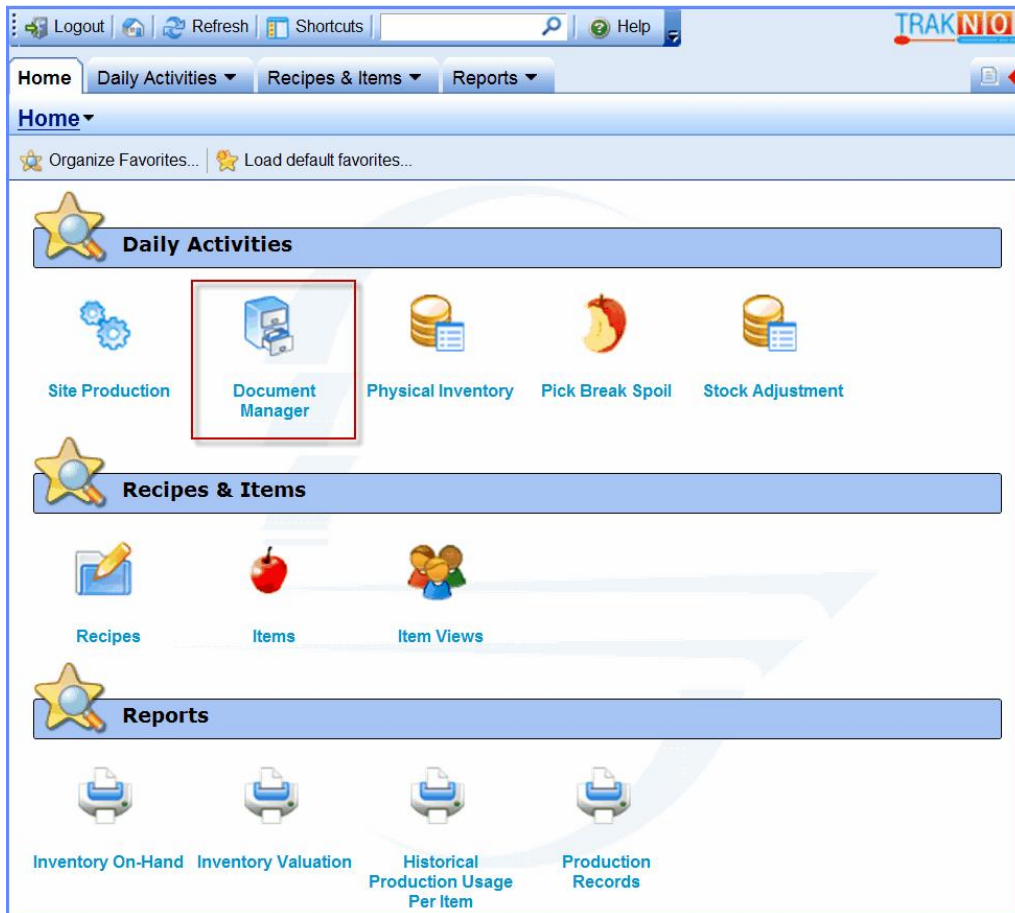
Order Lines									
General Details									
Vendor	Warehouse / WH		Received Date	01/01/2010	Invoice Number				
Order Id	--		Status	Draft	Ordered Total Qty	3			
Ordered Total Cost \$	94.6400		Received Total Qty	3	Received Total Cost \$	94.6400			
Add Items									
Received Items - Received Items									
Item Code	Supplier Code	Item Name	Rcv Qty	Rcv UOM	Rcv Price \$	Rcv Tot \$	Rjct Qty	Reason	R
W15327	W15327	Pot Holder	1.00	1 Ea / Ea - 12 Ea / Dozen	77.8400	77.8400	--		
W15329	W15329	Towel Bar	2.00	1 Ea / Ea - 12 Ea / Dozen	16.8000	16.8000	--		

5. Enter the invoice number or the date if the warehouse does not have invoice numbers.
6. Verify the received quantity. Make any changes needed.
7. Click "Approve".



8. Click "OK".

Transfers between Sites



1. Click on "Document Manager" on the Home Page (the Home Page may look slightly different, as each district can customize the Home Page favorites).

Document Manager											
<input type="button" value="Close"/> <input checked="" type="checkbox"/> Approve <input checked="" type="checkbox"/> Submit <input checked="" type="checkbox"/> Transfer All <input type="button" value="Select All"/> <input type="button" value="Unselect All"/> <input type="button" value="Bulk Change"/>											
<input type="button" value="Requisition"/> <input type="button" value="Purchase Order"/> <input type="button" value="Transfer"/> <input type="button" value="Receiving"/> <input type="button" value="Preorder"/> <input type="button" value="Supply Requisition"/>											
	View	Del	Edit	Document Type	Supplier	Destination Site	Document Status	Due Date	Document Id	Ref. Order Id	Creation Date
<input type="checkbox"/>				Purchase Order	Schepps Dairy	Klein High School	Partially Received	11/20/2009	189662		11/12/2009
<input type="checkbox"/>				Transfer	Klein Annex	Klein High School	Wait2BReceived	11/19/2009	189719		11/12/2009
<input type="checkbox"/>				Purchase Order	Blue Bell Creameries, L.P.	Klein High School	Wait2BReceived	11/16/2009	189793		11/12/2009
<input type="checkbox"/>				Purchase Order	Sunny Sky Products	Klein High School	Wait2BReceived	11/18/2009	189795		11/12/2009
<input type="checkbox"/>				Purchase Order	Schepps Dairy	Klein High School	Wait2BReceived	12/15/2009	190088		11/24/2009
<input type="checkbox"/>				Purchase Order	Labatt Food Service	Klein High School	Manage By District	12/15/2009	190090		11/24/2009
<input type="checkbox"/>				Purchase Order	Schepps Dairy	Klein High School	Wait2BReceived	11/26/2009	190124		11/25/2009
<input type="checkbox"/>				Purchase Order	Schepps Dairy	Klein High School	Wait2BReceived	11/27/2009	190125		11/25/2009
<input type="checkbox"/>				Purchase Order	Labatt Food Service	Klein High School	Manage By District	11/25/2009	190131		11/25/2009
<input type="checkbox"/>				Supply Requisition	Commodity Warehouse	Klein High School	On Order	12/18/2009	190146		11/25/2009
<input type="checkbox"/>				Purchase Order	Blue Bell Creameries, L.P.	Klein High School	Wait2BReceived	12/03/2009	190161		12/01/2009

Transfers between Sites

Send a Transfer

Document Manager ▼

Close
 Approve
 Submit
 Transfer All
 Select All
 Unselect All
 Bulk Change

Requisition
 Purchase Order
 Transfer
 Receiving
 Preorder
 Supply Requisition

1. Click on "Transfer".

Order Criteria -- Webpage Dialog

Transfer Order Criteria

General Details

Destination

From Date

To Date

Apply Close

2. Select the destination site by clicking on the magnifying glass to pull up the list of sites.

InnerSite -- Webpage Dialog

Filter

Site Code	Site Name	Description
002	Klein Forest High School	
003	Klein Oak High School	
004	Klein Collins High School	
036	Vistas High School	
038	Klein Annex	
041	Klein Intermediate	
042	Hildebrandt Intermediate	
043	Wunderlich Intermediate	
044	Strack Intermediate	
045	Kleb Intermediate	
046	Doerre Intermediate	
047	Schindewolf Intermediate	
101	Kohrville Elementary	
102	Northampton Elementary	
103	Haude Elementary	

Page: of: 1 Total Found: 42




Apply Close


3. Highlight the destination site and click "Apply".


Order Criteria -- Webpage Dialog


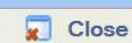

Transfer Order Criteria

General Details

Destination: N Kohrville Elementary    Kohrville Elementary / 101

From Date: 01/05/2010  *

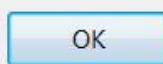
To Date: 01/05/2010  *

 **Apply**  **Close** 

4. Select the appropriate date for the transfer.
5. Click "Apply".

Message from webpage

 No orders were found!

 OK

6. Click "OK". No orders will be found since this is an open transfer.

Transfer

General Details

Order Id	--	Status		Due Date	01/05/2010 
Destination	Kohrville Elementary / 101	Expected Total Cost \$	0.00	Actual Total Cost \$	0.00

 **Add Items**

Transfer - Items to Ship to Sites

	Item Code	Item Name	Sup Qty	Sup UOM	Ref No.	Remarks	Sup Tot \$	Ord

7. Click "Add Items" to select the items to be transferred.

Transfers between Sites

InnerSiteItemSupplier -- Webpage Dialog

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

Item Name	Item Code	Description
Antioxidant	2121176	1/1# Royal OMF65
Apple Filled Breadsticks (Bosco)	9385894	Apple Filled Breadstick 72/7" Bosco 2172
Apples, Golden Delicious	9800046	125-138 Ct
Apples, Granny Smith	9800558	138 Ct
Apples, Red Delicious	9800555	138 Ct
Bacon, Turkey	8938129	12/50 slices Jennie O 2711-06
Bag, Brown 6# Duro	9689225	500ct Duro
Bag, Bun Pan, 27 x 37	7720139	200 ct
Bag, Flip Top Sandwich Handguards	7035215	2000/cs Food Handler

Page: 1 of 10 Total Found: 478

Item Name	Item Code	Description
Apple Slices	9911277	6/#10 commodity A079
Applesauce	9911276	6/#10 Blue Ribbon #85647

Page: 1 Of: 1 Total Found: 2

Apply **Close**

8. Select item(s) by clicking on the blue down arrow to add to the list on the bottom. Once all items have been added, click "Apply".

Transfer order -- Webpage Dialog

Transfer

General Details

Order Id: --- Status: --- Due Date: 01/05/2010

Destination: Kohrville Elementary / 101 Expected Total Cost \$: 0.00 Actual Total Cost \$: 105.56

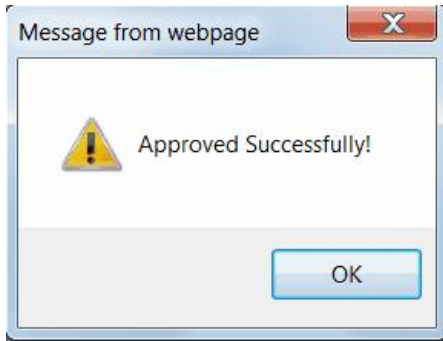
Add Items

Transfer - Items to Ship to Sites

Item Code	Item Name	Sup Qty	Sup UOM	Ref No.	Remarks	Sup Tot \$	Ord
9911277	Apple Slices	2.00	1 #10 / #10 - 6 #10 / Case(c)			37.6000	
9911276	Applesauce	4.00	1 #10 / #10 - 6 #10 / Case			67.9601	

Approve **Print Pick List** **Save** **Close** **Print**

9. Enter the quantity sent in the "Sup Qty" column.
10. Click "Approve".



11. Click "OK".

Document Manager											
Close [x] Approve [x] Submit [x] Transfer All [x] Select All [x] Unselect All [x] Bulk Change [x]											
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
<input type="checkbox"/>				Transfer	Klein High School	Wunderlich Intermediate	Wait2BReceived	12/28/2009	190303		12/21/2009
<input type="checkbox"/>				Requisition	Klein High School	Klein High School	Pending	12/25/2009	190314		12/23/2009
<input type="checkbox"/>				Requisition	Klein High School	Klein High School	Pending	12/30/2009	190317		12/28/2009
<input type="checkbox"/>				Requisition	Klein High School	Klein High School	Pending	12/30/2009	190319		12/28/2009
<input type="checkbox"/>				Purchase Order	Schepps Dairy	Klein High School	Draft	12/30/2009	190320		12/28/2009
<input type="checkbox"/>				Supply Requisition	Warehouse	Klein High School	On Order	12/30/2009	190321		12/28/2009
<input type="checkbox"/>				Purchase Order	Schepps Dairy	Klein High School	Wait2BReceived	01/04/2010	190323		12/29/2009
<input type="checkbox"/>				Transfer	Klein High School	Kohnville Elementary	Wait2BReceived	01/05/2010	190328		12/29/2009

12. The created transfer will display the supplier as the sending site. The receiving site will be displayed in the destination site column.

13. The transfer will display "Wait2BReceived" until the destination site receives in the transfer order. It will then be removed from the document manager screen.

Receive a Transfer

Document Manager											
Close [x] Approve [x] Submit [x] Transfer All [x] Select All [x] Unselect All [x] Bulk Change [x]											
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
<input type="checkbox"/>				Purchase Order	Schepps Dairy	Kohnville Elementary	Wait2BReceived	11/17/2009	189559		11/11/2009
<input type="checkbox"/>				Purchase Order	Schepps Dairy	Kohnville Elementary	Wait2BReceived	11/18/2009	189562		11/11/2009
<input type="checkbox"/>				Purchase Order	Schepps Dairy	Kohnville Elementary	Wait2BReceived	11/19/2009	189564		11/11/2009
<input type="checkbox"/>				Purchase Order	Blue Bell Creameries, L.P.	Kohnville Elementary	Wait2BReceived	11/16/2009	189638		11/11/2009
<input type="checkbox"/>				Purchase Order	Schepps Dairy	Kohnville Elementary	Wait2BReceived	11/20/2009	189764		11/12/2009
<input type="checkbox"/>				Transfer	Krahn Elementary	Kohnville Elementary	Wait2BReceived	11/20/2009	190065		11/13/2009
<input type="checkbox"/>				Transfer	Hassler Elementary	Kohnville Elementary	Wait2BReceived	11/20/2009	190076		11/13/2009
<input type="checkbox"/>				Transfer	Commodity Warehouse	Kohnville Elementary	Wait2BReceived	12/22/2009	190110	*	11/25/2009
<input type="checkbox"/>				Transfer	Klein High School	Kohnville Elementary	Wait2BReceived	01/05/2010	190328		12/29/2009

1. A transfer will display the sending site as the supplier and the document status will display "Wait2BReceived".
2. Click on the transfer to highlight it.
3. Click on "Receiving" to open the receiving document.

Transfers between Sites

ReceivingOrder -- Webpage Dialog

Order Lines

General Details

Vendor	Klein High School / 001	Received Date	01/05/2010	Invoice Number	
Order Id	--	Status	Draft	Ordered Total Qty	0
Ordered Total Cost \$	0.0000	Received Total Qty	6	Received Total Cost \$	105.5600

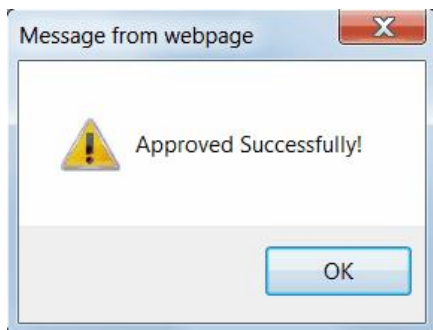
Add Items

Received Items - Received Items

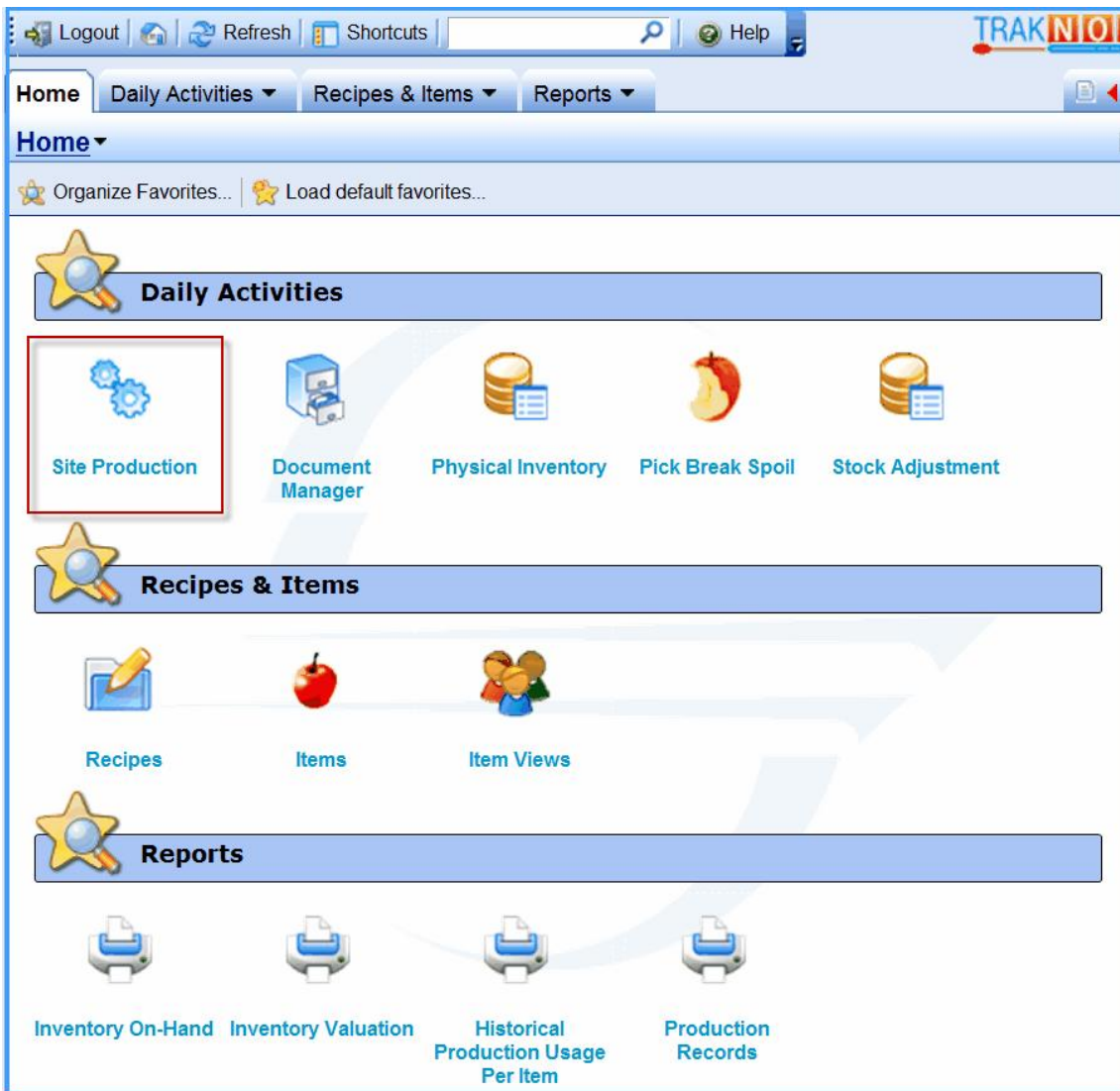
Item Code	Supplier Code	Item Name	Rcv Qty	Rcv UOM	Rcv Price \$	Rcv Tot \$	Rjct Qty	Reason
9911277	9911277	Apple Slices	2.00	1 #10 / #10 - 6 #10 / Case(c)	18.8000	37.6000	--	
9911276	090035	Applesauce	4.00	1 #10 / #10 - 6 #10 / Case	21.7300	67.9601	--	

Approve Save Close Print

4. Enter the invoice number or the date if invoice numbers are not used.
5. Verify the received quantity. Make any changes needed.
6. Click "Approve".



7. Click "OK".



1. Click on "Site Production" on the Home Page (the Home Page may look slightly different, as each district can customize the Home Page favorites).

Site Production Criteria

From Date

To Date

2. Enter the specified date range to post production for the current day.

3. Click "Apply" to enter the production menu.
4. Select the appropriate date/day to begin entering actual production numbers by clicking on the date. The date will highlight in yellow and the menu will appear on the right hand side of the screen.

[illegible]

5. Click on “Edit”,  to enter the Menu Planning section of the production record.

Adding Additional Item / Recipes / Patterns

Name: **Second, Break, Fri Wk 2** Code: **SBW205**

Menu Planning **Food Based**

General Details

Menu Name: **Second, Break, Fri Wk 2** Menu Code: **SBW205** Meal Type Name: **Breakfast**

Planned # of Servings: **80** Serving Location: **N** **Internal / Internal**

Age Group: **Grades 6-12 (Breakfast)**

Add Menu Item: **Item** Item/Recipe/Pattern

Inactive: ☐

Item: **N** **cereal** Menu Item type: **-----**

Serving Size: **1.00** Serving Type: **-----** Planned Servings: **80** **Add**

Item Leftover: **N**

Menu Items (= A CN Database Serving Type)**


Item	Name
↑	Scrambled Eggs
↑	Sausage Patty
↑	Pears, Sliced, light syrup
↑	Pears, Diced, light syrup
↑	Juice, 4 oz
↑	Cinnamon Rolls, Homemade
↑	Cereal, Assorted
↑	Toast
↑	Milk
↑	Jelly, Apple-Grape
↑	Sauce, Picante, bulk
↑	Bacon, Turkey

Item -- Webpage Dialog

Filter By: **Item Name** Contains **-----** Go **Filter**

Item Name	Item Code	Description
Cereal, Honey Graham Squares	9390726	96/1 oz Malt O Meal 04515
Cereal, Raisin Bran	9388749	96/1.25 oz Malt O Meal 00715
Cereal, Rice (Bulk)	6498018	4/32 Oz Ralston 33051
Cereal, Tootie Fruities .75 oz	9386120	96/75 oz Malt O Meal 01315

Page: **1** of: **1** Total Found: **4** **Apply** **Close**

1. Add additional menu items/recipes/patterns by clicking on the drop down arrow next to "Add Menu Item". Select the appropriate menu item.
2. Enter the first few letters of the name in the Item, Recipe or Pattern box. Click the "Apply",  function.
3. Highlight the desired item and click "Apply".

Name: **Second, Break, Fri Wk 2** Code: **SBW205**

Menu Planning **Food Based**

General Details

Menu Name: **Second, Break, Fri Wk 2** Menu Code: **SBW205** Meal Type Name: **Breakfast**

Planned # of Servings: **80** Serving Location: **N** **Internal / Internal**

Age Group: **Grades 6-12 (Breakfast)**

Add Menu Item: **Item** Item/Recipe/Pattern

Inactive: ☐

Item: **N** **Cereal, Raisin Bran** Menu Item type: **-----**

Serving Size: **1.00** Serving Type: **Each (1.25 oz)(1.00-35.44g)** Planned Servings: **80** **Add**

Item Leftover: **N** Course: **-----** Portion Size: **-----** Serving Type: **-----** Left Over amount: **-----** **Add**

Menu Items (= A CN Database Serving Type)**

Name	Type	Code	Menu Item type	Servi	Serving Type	Student Pl	Adult / s l	Total Plan	Leftovers Added
↑	Recipe	J - 1		1.00	Serving (4 x 5 cut)(1.00-52.58g)	20	0	20	0
↑	Item	8922447		1.00	Each (1.025 oz)(1.00-29.06g)	20	0	20	0
↑	Item	480038		1.00	Scoop#8 (Breakfast) (1.00-121.5...	0	0	0	0

4. Enter the serving size quantity.
5. Select the appropriate serving from the drop down menu next to Serving Type.
6. Enter the number of projected servings in the "Projected Servings" box and click "Add".
7. Continue until all menu items have been added.
8. Click "Save" to exit the edit screen and return to the main site production screen.
9. Click "OK".

Adding Leftovers

[illegible]

-

Name	Type	Menu Item ...	Code	Item Mgmt t...	CH Code	Serv... Serving Type	Nut. Pt...	Adult / ...	Total S...
Chick Nuggets, Lt & Dk Meat...	Item	Entree	5355	Nutr & Inv	5355	1.00 Serving 16...	100	0	100
Rolls, Hard (Ind Kaiser)	Item	Side	18353	Nutr & Inv	18353	1.00 roll 13-1/2"	100	0	100
Peas, Grn, Cnd, Req Pk, So, Lg...	Item	Side	11306	Nutr & Inv	11306	1.00 Cup 1 dram	100	0	100
Peach Cobbler	Recipe	Side	C-13	Nutr & Inv		1.00 Serving 1...	100	0	100
Milk	Pattern	Side	3			1.00 Cup 1.00...	100	0	100

- 

ItemLeftOver -- Webpage Dialog

Filter By

Item Name

Contains

Go

Filter

	Item Name	Item Code	Is Recipe	Serving Type	Serving Size	Quantity	
	Cereal, Honey Nut C...	4696	No	PACKAGE**	1	40	
	Syrup	4711	No	Each	1	20	
	Yogurt, Fruit, LoFat, ...	4716	No	Each (4oz)	1	20	
	Milk, Chocolate, Low...	4724	No	CUP**	1	45	
	Juice, Apple, 100%, ...	4801	No	Container (6...	1	120	
	Juice, Orange, 100...	4802	No	Container (6...	1	20	
	Juice, Grape, 100%, ...	4804	No	Container (6...	1	30	
	Juice, Pineapple, 10...	4805	No	Container	1	20	
	Milk, Strawberry Lo...	4815	No	CUP	1	66	
	Apples, Raw, With S...	9003	No	small (2-1/2...	1	200	

3. Click on the leftover item/recipe needed to highlight it.
4. Click "Apply" to add it to the menu.

Item: Leftover: Course:

Portion Size: Serving Type: Left Over amount:

Menu Items (** = A CN Database Serving Type)

Name	Type	Menu Item ...	Code	Item Mgmt t...	CN Code	Serv...	Serving Type	Nut. Pr...	Adult / ...	Total S...
Chick Nuggets, Lt & Dk Meat...	Item	Entree	5355	Nutr & Inv	5355	1.00	Serving (6...	100	0	100
Rolls, Hand (Ind Kaiser)	Item	Side	18353	Nutr & Inv	18353	1.00	roll (3-1/2"	100	0	100
Peas, Grn, Cnd, Reg Pk, Sol&Liq...	Item	Side	11306	Nutr & Inv	11306	1.00	Cup (dram...	100	0	100
Peach Cobbler	Recipe	Side	C-13	Nutr & Inv		1.00	Servings (1...	100	0	100
Milk	Pattern	Side	3			1.00	Cup (1.00-...	100	0	100

5. Select the "Course" from the drop down menu.
6. Enter the portion size in the "Portion Size" box.
7. Select the serving type from the "Serving Type" drop down menu.
8. Enter the quantity of leftovers in the "Leftover Amount" box.
9. Continue until all menu items have been added and click "Add".
10. Click "Save" to exit the edit screen and return to the main site production screen.



11. Click "OK".

Additional Information Concerning Leftovers:

- Selecting "Freeze" leftovers will hold in leftover selection area for a month.
- Selecting "Refrigerate" will hold for 3 days.
- Selecting "Serve next day" will automatically add to the next day's production with the amount of leftovers included if the item/recipe previously exists on the menu already.
- Selecting "Return to Stock" will place the items back in inventory to be used at a later date.

Entering Prepared Amounts, Meals Served and Leftovers in Production

1. Click on “Production Record” to enter the data entry area.

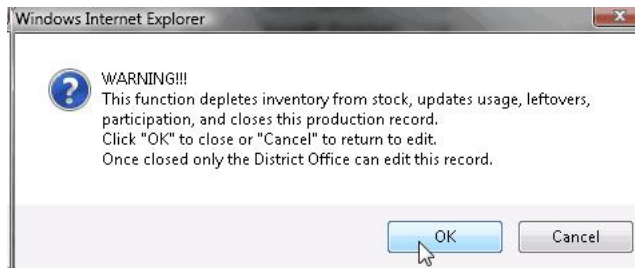
Criteria to Complete Production Record:

- © 2010 PCS Revenue Control Systems, Inc.

Entering Prepared Amounts, Meals Served and Leftovers in Production

14. Enter the "Holding Temp".

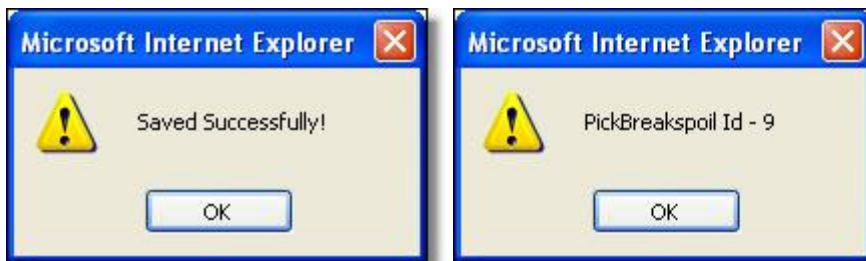
15. Upon finishing the production record click "Finished" to complete and close the record. Once closed it will not be editable except by district personnel.



16. Click "OK" to finalize the production record. No changes may be made to the production after this point.



17. Click "OK" to save any missing values as zeros if any boxes are left intentionally blank.

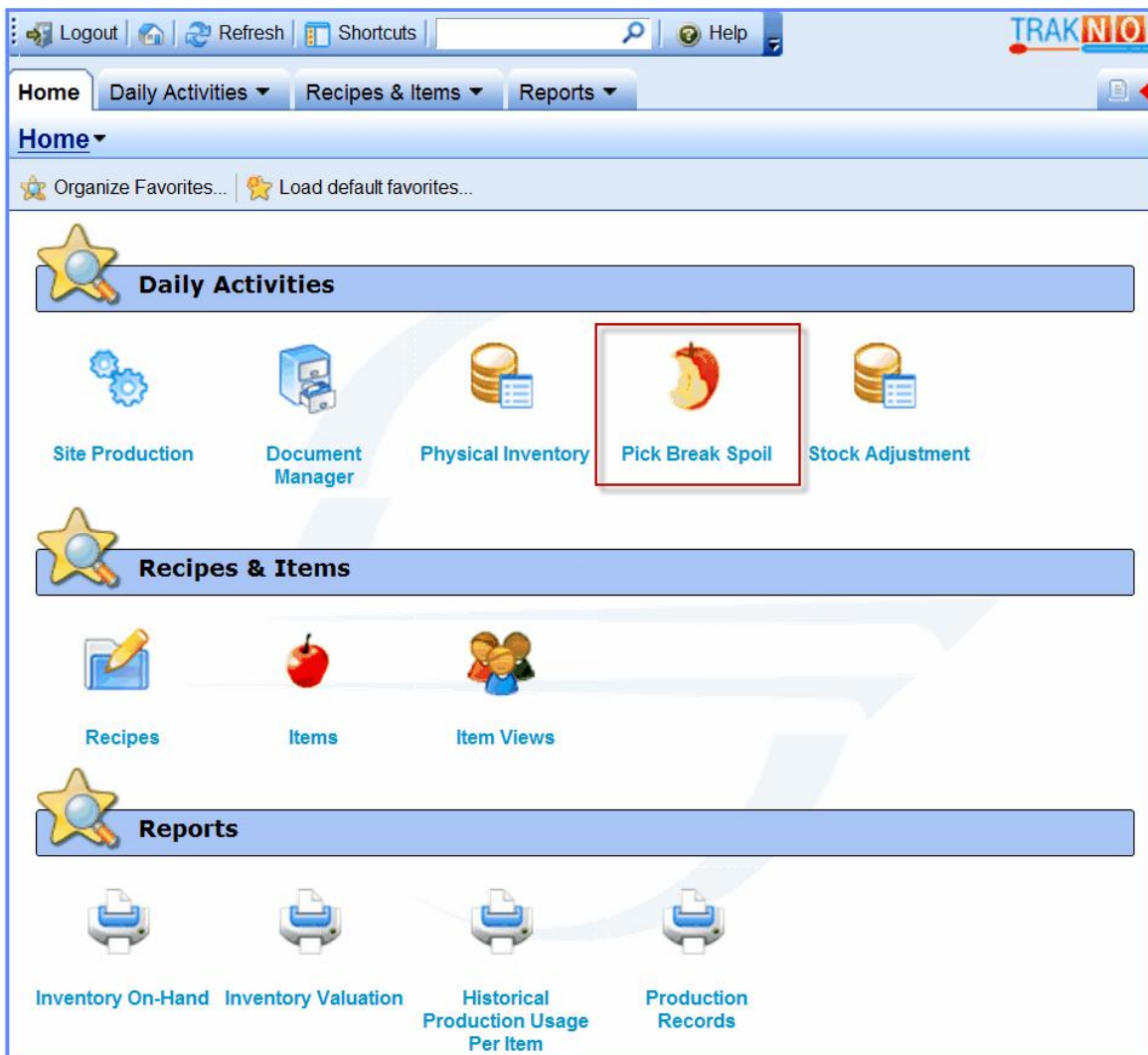


18. Click "OK" on the "**Saved Successfully!**" pop up screen and on the "**PickBreakspoil**" or "**Meal Created**" pop up screen.

19. The day's production is now complete.

Notes:

This section will demonstrate how to pull items from inventory that are not on the production record. Pick, break and spoil may be used to pull items that need to be removed from stock due to spoilage, breakage, etc.



1. Click on "Pick Break Spoil" on the Home Page (the Home Page may look slightly different, as each district can customize the Home Page favorites).

Search for Closed Documents

Search for Closed Documents

Pick Break Spoil

Close New Edit View Delete

Code	Name	S Clear Filter	Date	Status	Description
72	SiteProductionJan 4 2007 9:41AM	Klein High School	01/04/2007	Closed	Recipe creation
82	SiteProductionJan 3 2007 12:00AM	Klein High School	01/03/2007	Closed	Meal creation
83	SiteProductionJan 4 2007 11:03AM	Klein High School	01/04/2007	Closed	Recipe creation
84	SiteProductionJan 3 2007 12:00AM	Klein High School	01/03/2007	Closed	Meal creation
85	SiteProductionJan 4 2007 11:07AM	Klein High School	01/04/2007	Closed	Recipe creation
86	SiteProductionJan 3 2007 12:00AM	Klein High School	01/03/2007	Closed	Meal creation
87	SiteProductionJan 4 2007 11:11AM	Klein High School	01/04/2007	Closed	Recipe creation
88	SiteProductionJan 3 2007 12:00AM	Klein High School	01/03/2007	Closed	Meal creation
89	SiteProductionJan 4 2007 11:12AM	Klein High School	01/04/2007	Closed	Recipe creation

1. To view the created pick, break and spoil documents, click the "Clear Filter" icon. This will show the closed documents on the screen.
2. The pick, break and spoil pulls items that have been served on a menu or used in a recipe from the perpetual inventory.
3. Pick, break and spoil will be created for recipes and meals.
4. Select the document needed by highlighting the document and then clicking View

PickBreakSpoil -- Webpage Dialog

Name: **SiteProductionJan 22 2007 7:21AM** Code: **1750**

Spoilage / Usage Input - Spoilage / Usage Input

General Details

Name: **SiteProductionJan 22 2007 7:21AM** Site Name: **Klein High School** Code: **1750**

Date: **01/22/2007** Status: **Closed**

Description: **Recipe creation**

Items to Adjust

View	Item Name	Item Code	Used Qty	U/U/PU	Reason	Usage Unit	Qty. On-Hand
	Beef Crumbles	8931089	5.00	Bag	Used for Recipe Production	Bag	
	Onions, Yellow	9808098	2.00	Pound	Used for Recipe Production	Pound	
	Oil, soybean	7996315	1.00	Pound	Used for Recipe Production	Pound	
	Spices, Garlic Powder	6184113	1.00	Container	Used for Recipe Production	Container	
	Tomatoes Crushed	2287506	1.00	Can #10	Used for Recipe Production	Can #10	
	Tomato Paste	2337004	1.00	Can #10	Used for Recipe Production	Can #10	
	Spices, Pepper, Black	6185086	2.00	Container	Used for Recipe Production	Container	
	Spices, Salt, Iodized	6313043	1.00	Pound	Used for Recipe Production	Pound	
	Sugar, Granulated	8520009	1.00	Pound	Used for Recipe Production	Pound	
	Spices, Basil, Sweet Leaf	6186217	1.00	Container	Used for Recipe Production	Container	
	Pasta, Spaghetti	4176982	4.00	Pound	Used for Recipe Production	Pound	

Close Print

5. The Recipe Creation shows all the items and the quantities that have been used in a recipe that have been prepared and served.

Search for Closed Documents

PickBreakSpoil -- Webpage Dialog

Name: **SiteProductionJan 16 2007 12:00AM** Code: **1625**

Spoilage / Usage Input - Spoilage / Usage Input

General Details

Name: **SiteProductionJan 16 2007 12:00AM** Site Name: **Klein High School** Code: **1625**

Date: **01/16/2007** Status: **Closed**

Description: **Meal creation**

Items to Adjust

	View	Item Name	Item Code	Used Qty	UU/PU	Reason	Usage Unit	Qty. On-Hand
		Mexican Corn	I - 12	116.00	Scoop#8	Used for Recipe Production	Scoop#8	
		Nachos Grande	D - 2	200.00	Serving	Used for Recipe Production	Serving	
		Jalapeno Cheese Bread	B - 7	200.00	Serving	Used for Recipe Production	Serving	
		Lettuce & Tomato Salad	E - 4	210.00	Serving	Used for Recipe Production	Serving	
		Cheesy Nachos	D - 2a	0.00	Serving	Used for Recipe Production	Serving	
		Pinto Beans	I - 10a	25.00	Scoop#8	Used for Recipe Production	Scoop#8	
		Black-Eyed Peas	I - 25	0.00	Serving	Used for Recipe Production	Serving	
		Green Beans, Frozen	I - 29a	0.00	Serving	Used for Recipe Production	Serving	
		Corn, Frozen	I - 30a	0.00	Serving	Used for Recipe Production	Serving	
		Green Peas, Frozen	I - 32	0.00	Serving	Used for Recipe Production	Serving	

Close Print

6. The Meal Creation shows all the items and the quantities that have been used in a menu that have been prepared and served.

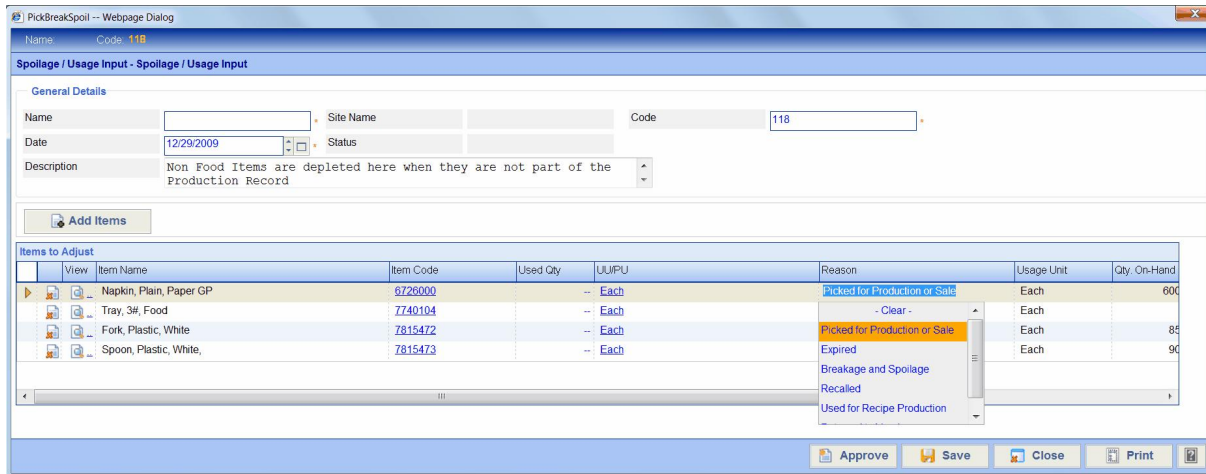
Creating Additional Pick, Break and Spoil

1. To create a new pick, break and spoil, click “New”.

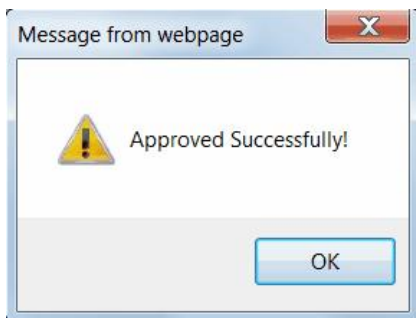
2. Click “Add Items” box.

© 2010 PCS Revenue Control Systems, Inc.

3. The list of inventory items will appear on the screen.
4. Items may be added by using the Filter By, Class, List or Location searches.
5. Click "Apply" once all items have been added.



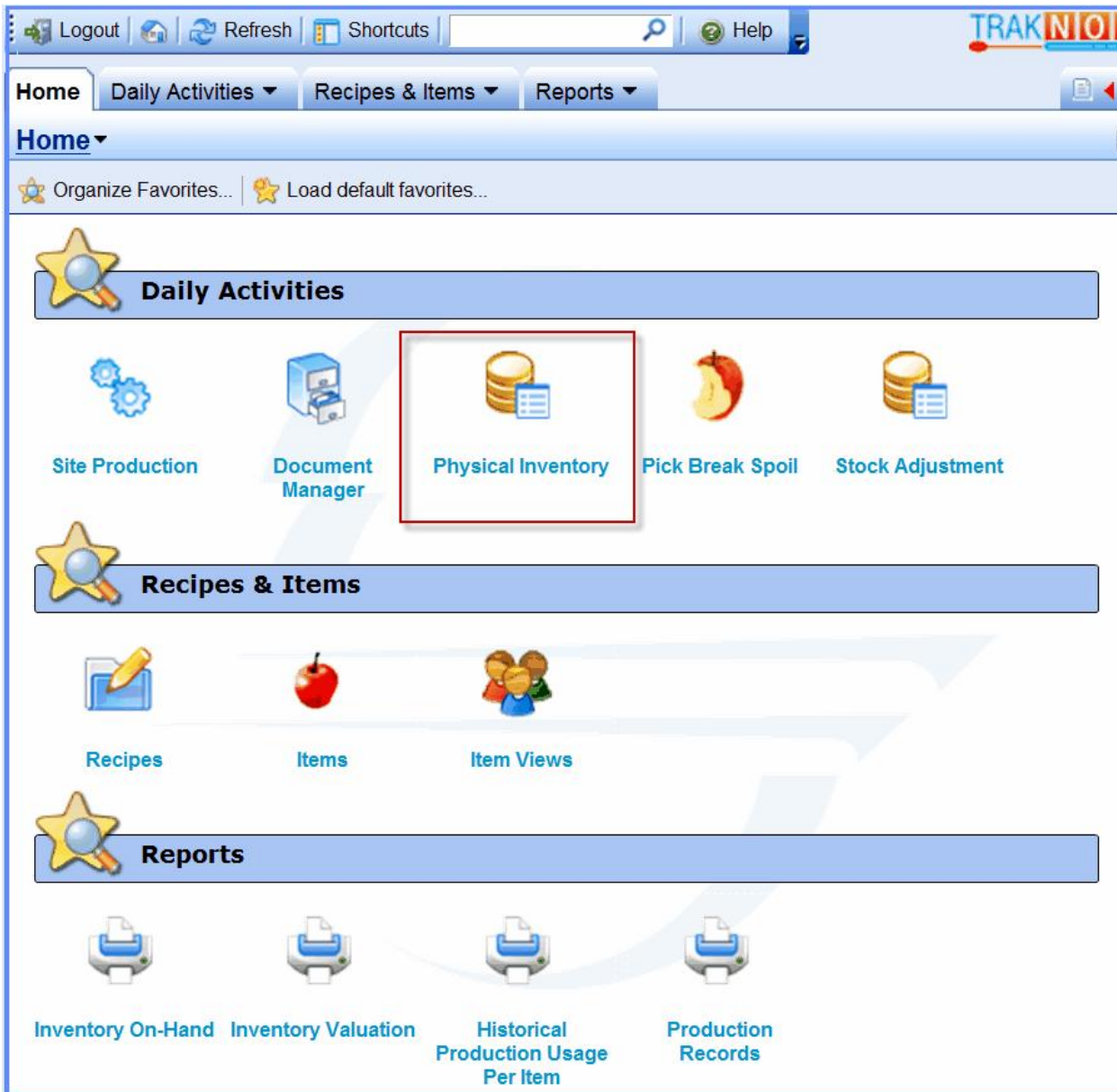
6. Enter the quantity of the items used in the Used Qty column. Select either the usage unit or purchase unit from the UU/PU Column.
7. Select the reason for pulling the product from inventory by clicking on the drop down box in the Reason column.
8. Type a name for the PBS in the name field, (ex.Daily, Adjustment, etc.).
9. Click "Approve" to pull item(s) from inventory and close the document.



10. Click "OK".

Notes:

This section will demonstrate how to perform a weekly or monthly inventory.



1. Click on "Physical Inventory" on the Home Page (the Home Page may look slightly different, as each district can customize the Home Page favorites).

Creating Inventory List

Creating Inventory List

Physical Inventory ▾

Close New Edit View Delete Copy Print Filter Help

Date	Name	Site Name	Status	Code	Description

1. Click "New" to begin a new inventory.

StockManagement -- Webpage Dialog

Name: **End of Month Inventory** Code: **4099**

Physical Inventory - Stock Count

Physical Inventory Details

Name: Site Name: Code:

Physical Inventory Date: Status: Blind Count: ☐

% of Inventory:

View	Del	Item Name	Code	Purchase Unit	PU Count	Usage Unit	UU Count	Item Class

Complete Save Close Print

2. Enter the inventory Name and the Physical Inventory Date. A calendar may be utilized by clicking on the box next to up/down arrows in the Physical Inventory Date section.

Physical Inventory - Stock Count

Physical Inventory Details

Name: Site Name:

Physical Inventory Date: Status:

% of Inventory:

3. Select "Quick List".

OAO Criteria -- Webpage Dialog

Physical Inventory Criteria

Physical Inventory Criteria

Show Positive Quantity Count ☐

Show Zero Quantity Count ☐

Show Negative Quantity Count ☐

Include Finished Goods ☐

Include Inactive Items ☐

% of Inventory

Class Filter

From Date

To Date

Apply Close

4. Click on the box next to any of the inventory criteria listed. Refer to your district office to determine the correct criteria.
5. Click "Apply".

Physical Inventory - Stock Count

Physical Inventory Details

Name * Site Name

Physical Inventory Date * Status

% of Inventory

Add Items Quick List

6. To add items to the inventory list, click "Add Items".

Creating Inventory List

InventoryItem -- Webpage Dialog

Filter By: Item Name Contains [] Go Filter Class List Location

Item Name	Item Code	Description
Bag, French Fry	7056262	2000ct
Bag, Hot Dog Imprinted Foil Reynolds	7035561	2000 Ct Foodhandler UPC21133
Bag, Insulated, Large	W15461	Insulated Bag for B.I.C. schools
Bag, Insulated, Small	W15460	Insulated Bag for B.I.C. schools
Bag, Zip Lock, snack size	1129357	1000/ct 6x4 Boritex-A20604
Bagel, blueberry, sliced	9230055	72/4 Oz Bakecrafters 649
Bagel, cinnamon raisin, sliced	9230082	72/4 Oz Bakecrafters 648
Bagel, honeywheat sliced	9230075	72/4 Oz Bakecrafters 658
Bagel, wholegrain sliced	9230080	72/4 Oz Bakecrafters 664

Page: 1 of 18 Total Found: 871

Item Name	Item Code	Description
Applesauce	9911276	6/#10 Blue Ribbon #85647
Bagel, plain, sliced	9230033	72/4 Oz Bakecrafters 647

Page: 1 Of: 1 Total Found: 2

Apply Close

7. Items may be added to the list by clicking on the blue arrow next to each specific item or items can be added by Class, List, or Location. Click "Apply" once all items have been selected.

StockManagement -- Webpage Dialog

Name: End of Month Inventory Code: 4099

Physical Inventory - Stock Count

Physical Inventory Details

Name: End of Month Inventory Site Name: Code: 4099

Physical Inventory Date: 12/30/2009 Status: Draft Blind Count: ☐

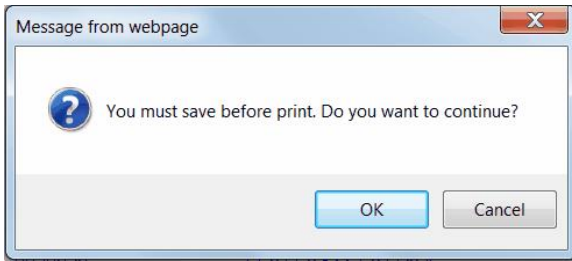
% of Inventory: --

Add Items Quick List

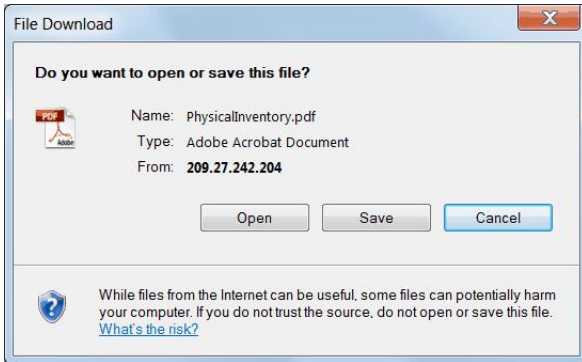
View	Del	Item Name	Item Code	Purchase Unit	PU Count	Usage Unit	UU Count	Item Class	Location
		Apples, Golden Delicious	9800046	1 Ea / Ea - 125 Ea / Case	--	Each	--	Fresh Produce	Cooler
		Apples, Granny Smith	9800558	1 Ea / Ea - 138 Ea / Case	--	Each	--	Fresh Produce	Cooler
		Apples, Red Delicious	9800055	1 Ea / Ea - 138 Ea / Case	--	Each	--	Fresh Produce	Cooler
		Bananas, Petite (approx 2.85 oz)	9812215	1 Ea / Ea - 150 Ea / Case	--	Each	--	Fresh Produce	Cooler
		Broccoli, Florets, Fresh	9812538	1 Lb / Lb - 3 Lb / Case	--	Pound	--	Fresh Produce	Cooler
		Cantaloupes, Fresh (12ct)	9858754	1 Ea / Ea - 12 Ea / Box	--	Each	--	Fresh Produce	Cooler
		Carrots, Baby, Indiv. Bags (2oz)	9832221	1 Ea / Ea - 50 Ea / Case	--	Each	--	Fresh Produce	Cooler
		Carrots, Fresh	9815093	1 Lb / Lb - 1 Lb / Bag	--	Pound	--	Fresh Produce	Cooler
		Carrots, Sticks	9820036	1 Lb / Lb - 5 Lb / Bag	--	Pound	--	Fresh Produce	Cooler

Complete Save Close Print

8. All items added using the Quick List and the Add Items button will appear. Click "Print".



9. Click "OK" to Save.



10. Click "Open".

PhysicalInventory[2].pdf - Adobe Reader

File Edit View Document Tools Window Help

2 / 31 78.9% Find

Physical Inventory

Site: Klein High School
Date: 12/30/2009
Name: End of Month Inventory
Blind Count: Yes
Status: Draft

Item Name	Item Code	Purchase Unit	PU Count	Usage Unit	UU Count	Item Class	Location	Variance	Perpetual
Apples, Golden Delicious	9800046	125 Ea / Case		Each		Fresh Produce	Cooler	N/A	N/A
Apples, Granny Smith	9800558	138 Ea / Case		Each		Fresh Produce	Cooler	N/A	N/A
Apples, Red Delicious	9800055	138 Ea / Case		Each		Fresh Produce	Cooler	N/A	N/A
Bananas, Petite (approx 2.85 oz)	9812215	150 Ea / Case		Each		Fresh Produce	Cooler	N/A	N/A
Broccoli, Florets, Fresh	9812538	3 Lb / Case		Pound		Fresh Produce	Cooler	N/A	N/A
Cantaloupes, Fresh (12ct)	9858754	12 Ea / Box		Each		Fresh Produce	Cooler	N/A	N/A
Carrots, Baby, Indiv. Bags (2oz)	9832221	50 Ea / Case		Each		Fresh Produce	Cooler	N/A	N/A
Carrots, Fresh	9815093	1 Lb / Bag		Pound		Fresh Produce	Cooler	N/A	N/A
Carrots, Sticks	9820036	5 Lb / Bag		Pound		Fresh Produce	Cooler	N/A	N/A
Celery, Fresh 6 bundles	9815226	6 Bunch / Box		Bunch		Fresh Produce	Cooler	N/A	N/A
Celery, Sticks	9820051	5 Lb / Bag		Pound		Fresh Produce	Cooler	N/A	N/A
Cucumbers, Whole	9815333	5 Lb / Bag		Pound		Fresh Produce	Cooler	N/A	N/A
Grapes, Red Seedless	9811159	18 Lb / Box		Pound		Fresh Produce	Cooler	N/A	N/A
Honeydew, Fresh	9806100	8 Ea / Box		Each		Fresh Produce	Cooler	N/A	N/A
Juice, 11.5 oz., Apple	9001003	24 Cn / Case		Can		Beverages	Cooler	N/A	N/A
Juice, 11.5 oz., kiwi strawberry	9001002	24 Cn / Case		Can		Beverages	Cooler	N/A	N/A
Juice, 11.5 oz., Orange	9001001	24 Cn / Case		Can		Beverages	Cooler	N/A	N/A
Juice, 11.5 oz., Fruit Punch	9001004	24 Cn / Case		Can		Beverages	Cooler	N/A	N/A
Lemons, Fancy	9804154	17 Ea / Box		Each		Fresh Produce	Cooler	N/A	N/A
Lettuce, 4-Way (4/5# bags)	9855996	4 Bg / Case		Bag		Fresh Produce	Cooler	N/A	N/A
Lettuce, Green Leaf (8lb/bag)	9805201	12 Bg / Case		Bag		Fresh Produce	Cooler	N/A	N/A
Lettuce, Shredded (4/5# bags)	9830084	4 Bg5 / Case		Bag 5 Lb		Fresh Produce	Cooler	N/A	N/A

Klein ISD Page 2 of 31 12/30/2009

Creating Inventory List

11. A printable PDF will open in a different browser. Items will be grouped and printed by location.

StockManagement - Webpage Dialog

Name: **End of Month Inventory** Code: **4101**

Physical Inventory - Stock Count

Physical Inventory Details

Name: **End of Month Inventory** Site Name: **Klein High School** Code: **4101**

Physical Inventory Date: **12/30/2009** Status: **Draft** Blind Count: ☒

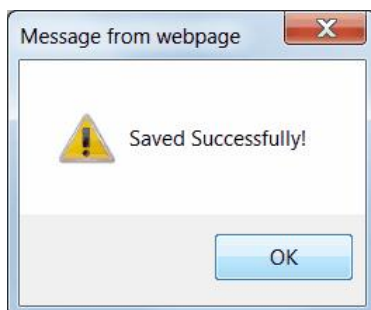
% of Inventory: **---**

Add Items **Quick List**

View	Del	Item Name	Item Code	Purchase Unit	PU Count	Usage Unit	UU Count	Item Class	Location	Variant
		Apples, Red Delicious	9800055	138 Ea / Case	--	Each	--	Fresh Produce	Cooler	
		Bananas, Petite (approx 2.85 oz)	9812215	150 Ea / Case	--	Each	--	Fresh Produce	Cooler	
		Broccoli, Florets, Fresh	9812538	3 Lb / Case	--	Pound	--	Fresh Produce	Cooler	
		Cantaloupes, Fresh (12ct)	9858754	12 Ea / Box	--	Each	--	Fresh Produce	Cooler	
		Carrots, Baby, Indiv. Bags (2oz)	9832221	50 Ea / Case	--	Each	--	Fresh Produce	Cooler	
		Carrots, Fresh	9815093	1 Lb / Bag	--	Pound	--	Fresh Produce	Cooler	
		Carrots, Sticks	9820036	5 Lb / Bag	--	Pound	--	Fresh Produce	Cooler	
		Celery, Fresh 6 bundles	9815226	8 Bunch / Box	--	Bunch	--	Fresh Produce	Cooler	
		Celery, Sticks	9820051	5 Lb / Bag	--	Pound	--	Fresh Produce	Cooler	
		Cucumbers, Whole	9815333	5 Lb / Bag	--	Pound	--	Fresh Produce	Cooler	
		Grapes, Red Seedless	9811159	18 Lb / Box	--	Pound	--	Fresh Produce	Cooler	
		Honeydew, Fresh	9806100	8 Ea / Box	--	Each	--	Fresh Produce	Cooler	
		Juice, 11.5 oz., Apple	9001003	24 Cn / Case	--	Can	--	Beverages	Cooler	
		Juice, 11.5 oz. kiwi strawberry	9001002	24 Cn / Case	--	Can	--	Beverages	Cooler	
		Juice, 11.5 oz. Orange	9001001	24 Cn / Case	--	Can	--	Beverages	Cooler	

Complete **Save** **Close** **Print**

12. Click "Save".



13. Click "OK".

Physical Inventory

Close **New** **Edit** **View** **Delete** **Copy** **Print** **Filter** **Sort** **Help**

Date	Name	Site Name	Status	Code	Description
12/30/2009	End of Month Inventory	Klein High School	 Draft	4101	

14. The Inventory document created will show as a "Draft" under the Status column.

Entering Inventory Count

Physical Inventory

Close New Edit View Delete Copy

Date	Name	Site Name	Status	Code	Description
12/30/2009	End of Month Inventory	Klein High School	Draft	4101	

1. To enter the physical count of the inventory, highlight the inventory and click "Edit".
2. The inventory list that was previously created will show as "Draft" until a physical count is entered.

StockManagement -- Webpage Dialog

Name: **End of Month Inventory** Code: **4101**

Physical Inventory - Stock Count

Physical Inventory Details

Name: **End of Month Inventory** Site Name: **Klein High School** Code: **4101**

Physical Inventory Date: **12/30/2009** Status: **Draft** Blind Count: **Yes**

% of Inventory: --

Add Items

View	Del	Item Name	Item Code	Purchase Unit	PU Count	Usage Unit	UU Count	Item Class
		Apples, Granny Smith	9800558	138 Ea / Case	2.00	Each	--	Fresh Produce
		Apples, Red Delicious	9800055	138 Ea / Case	1.00	Each	--	Fresh Produce
		Bananas, Petite (approx 2.85 oz)	9812215	150 Ea / Case	0.50	Each	--	Fresh Produce
		Broccoli, Florets, Fresh	9812538	3 Lb / Case	--	Pound	1.00	Fresh Produce
		Cantaloupes, Fresh (12ct)	9858754	12 Ea / Box	--	Each	--	Fresh Produce
		Carrots, Baby, Indiv. Bags (2oz)	9832221	50 Ea / Case	--	Each	--	Fresh Produce
		Carrots, Fresh	9815093	1 Lb / Bag	--	Pound	--	Fresh Produce
		Carrots, Sticks	9820036	5 Lb / Bag	--	Pound	--	Fresh Produce
		Celery, Fresh 6 bundles	9815226	6 Bnch / Box	--	Bunch	--	Fresh Produce
		Celery, Sticks	9820051	5 Lb / Bag	--	Pound	--	Fresh Produce
		Cucumbers, Whole	9815333	5 Lb / Bag	--	Pound	--	Fresh Produce
		Grapes, Red Seedless	9811159	18 Lb / Box	--	Pound	--	Fresh Produce

Complete Save Close Print

3. Enter the count of each item in the "PU Count" or "UU Count" columns.
4. Once all inventory counts have been entered, click "Complete".

Message from webpage

Completed Successfully!

OK

5. Click "OK". The inventory will now be removed from the Physical Inventory screen and will be in a closed status.

[illegible]

www.pcsRCS.com

TRAK **NOW**

NOTHING ON THE AIR



PCS REVENUE CONTROL SYSTEMS, INC.

www.pcsRCS.com
560 SYLVAN AVENUE, ENGLEWOOD CLIFFS, NJ 07632

TEL: 1-800-247-3061 / 1-201-568-8300
FAX: 1-201-568-8381 E-MAIL: WE CARE@PCS RCS.COM