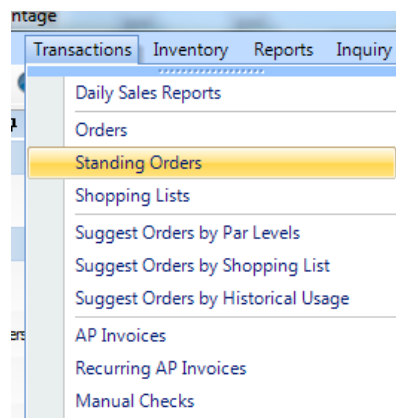


Standing Orders

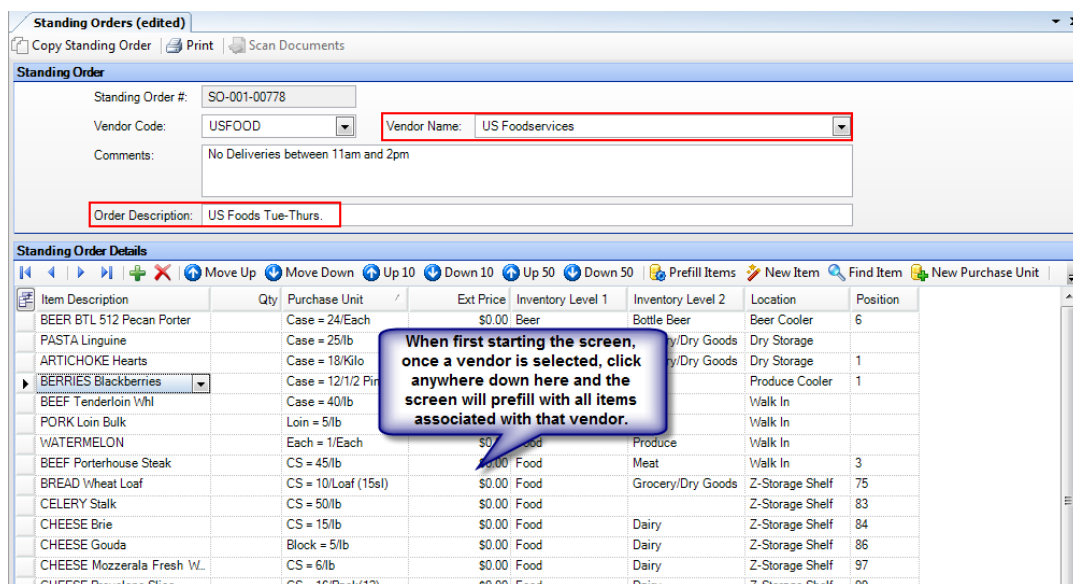
Standing Orders are a way to organize the items you order from vendors into a standard “template” format to use over and over in the Orders screen itself. They can be sorted in any way that works for your business (typically by Location/Position), and since that sort maintains on both the Ordering Worksheet and the Orders screen itself, it makes for smoother PO entry.

To utilize Standing Order Orders, you first must create the template itself under

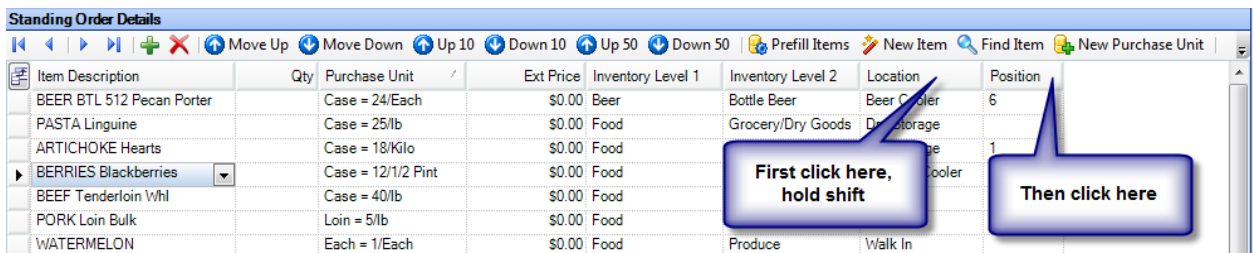
Transactions → Standing Orders:



This screen is used to customize the list of items as well as the sort order those items maintain going forward. Use the drop downs to look up a vendor by Vendor Code or Vendor Name; add any comments you would like the vendor to see on every PO they receive; and add a description for the order template you are creating:



Use the column headers to sort the screen by that column. If you wanted to adhere to the sort order of the inventory counts, first click the Location header, hold down the Shift key on your keyboard, and click the Position header, this will do a “first sort by Location then sort by Position within those locations”:



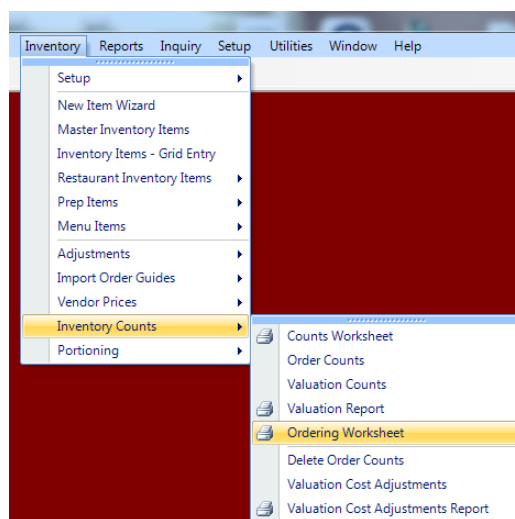
Typically it is not recommended that you add numbers to the “Qty” column, since this is a template and not an order itself. The quantities you add here will flow through to the order screen and can only create confusion and ordering errors.

Once you have the screen in the order you prefer, you can save the template with the blue disk at the top of the screen. You will now be able to use this template throughout the software.

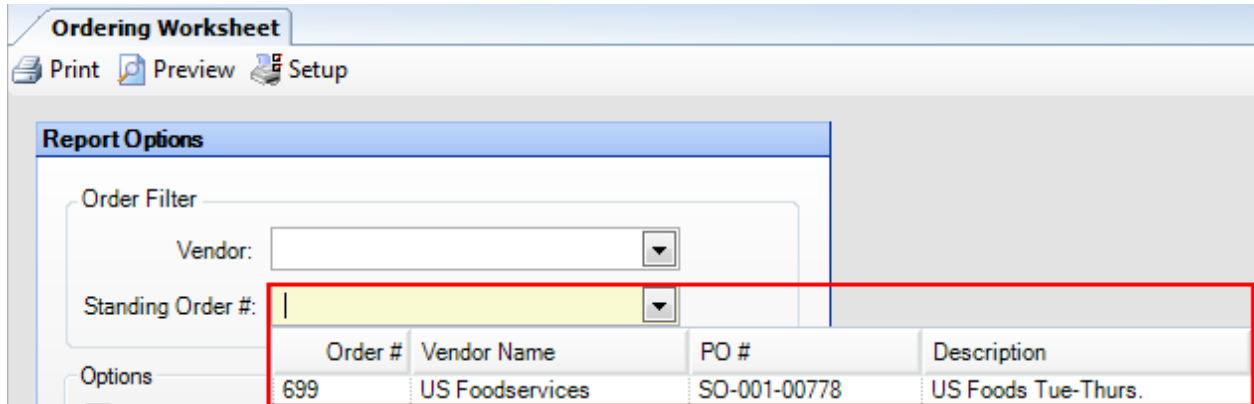
The next step in the process is to obtain a physical sheet to walk around the restaurant and determine what you would like to order from the vendor. There are two ways to get an ordering worksheet for use.

1. You can use the Ordering Worksheet native to Compeat.

Navigate to Inventory → Inventory Counts → Ordering Worksheet:



Once on this screen select the dropdown for Standing Order # and choose the Standing Order you would like to use for your current order:

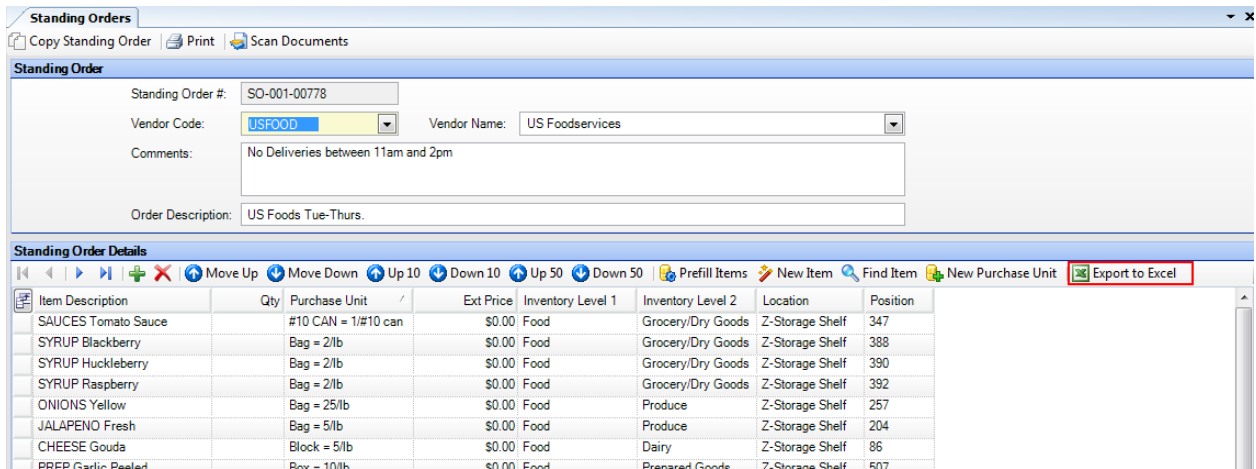


Select Print, the sheet will look similar to the following:

Ordering Worksheet						
Entity:	#1 - Austin	Report Run:	8/27/2014 10:52:00 AM			
Vendor:	N/A	Page:	1 of 1			
Order:	#699 - US Foods Tue-Thurs.	Include Unposted Vouchers:	No			
Item Code	Item #	Item Description	Purchase Unit	Price	Purch. Qty On Hand	Order Qty.
497984	2186	BEER BTL 512 Pecan Porter	Case = 24/Each	22.93	1.00	
	2269	PASTA Linguine	Case = 25/lb			0.00
1327055	2015	ARTICHOKE Hearts	Case = 18/Kilo	15.00		0.33
136625	2238	BERRIES Blackberries	Case = 12/1/2 Pint	18.88		0.00
	2296	BEEF Tenderloin Whl	Case = 40/lb			
	2266	PORK Loin Bulk	Loin = 5/lb	23.55		0.00
	2265	WATERMELON	Each = 1/Each			0.00
6599977	2146	BEEF Porterhouse Steak	CS = 45/lb	494.91		0.00
0827428	2130	BREAD WheatLoaf	CS = 10/Loaf (15sl)	28.30		0.00
213841	133	CELERY Stalk	CS = 50/lb	65.25		0.00
45654	2008	CHEESE Brie	CS = 15/lb	12.00		0.00
661491	12	CHEESE Gouda	Block = 5/lb	10.33		0.00
564DF	2064	CHEESE Mozzarella Fresh Water	CS = 6/lb	6.00		0.00
47855	126	CHEESE Provolone Slice	CS = 16/Pack(12)	19.56		0.00
5377023	127	CHEESE Swiss Slice	CS = 20/Pack(12)	2.46		0.00
055633	2136	CORN DOG Veggie	CS = 24/Each	26.55		0.00
65465	1999	DOUGH Gluten Free	CS = 40/Each	10.00		0.00
654654	63	FISH Blue Grouper	CS = 45/lb	44.00		0.00
6545654	2040	FISH Salmon Whole	Fish = 16/lb	52.00		0.00
556615	21	HERB Parsley	Lb. = 1/lb	3.75		0.00
984565	2036	HOPS Cascade	Lb. = 1/lb	8.00		0.00
126841	4	JALAPENO Fresh	Bag = 5/lb	47.50		0.00

You can use this sheet to write the quantity needed for each item in the far right column. This sheet also shows the price per purchase unit as well as the theoretical quantity on hand. Both of numbers can be useful when physically looking at your inventory on hand to place an order.

2. The other way to generate an Ordering Worksheet, is to export the template to Excel straight from the Standing Order screen:



This will generate an excel worksheet that can then be manipulated into any format you choose, while maintaining the sort order you previously established on the screen:

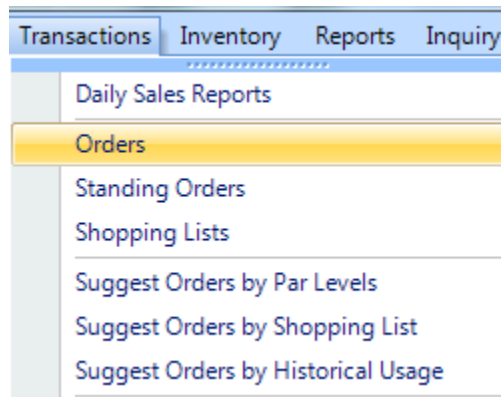
US FOODS ORDER GUIDE		Tuesday			Thursday			Tuesday			Thursday		
		On Hand	Par	Order	On Hand	Par	Order	On Hand	Par	Order	On Hand	Par	Order
BEER BTL Corona	18 pack = 18/Each												
BEER BTL Corona Light	Case = 24/Each												
TAX Food	Ea = 1/Each												
TAX Liquor	Ea = 1/Each												
TAX Smallwares	Ea = 1/Each												
TOGO Cup 16oz	CS = 500/Each												
BEER BTL Amstel Lt	CS = 24/Each												
BEER BTL Amber	CS = 24/Each												
BEER BTL 512 Pecan Porter	Case = 24/Each												
ARTICHOKE Hearts	Case = 18/Kilo												
BERRIES Blackberries	Case = 12/1/2 Pint												
PREP Marinara Sauce	Case = 2/1/3 Pan VOL												
BEEF Porterhouse Steak	CS = 45/lb												
BEEF Ribeye	LB = 1/lb												
BEEF Tri-tip	Case = 15/lb												
CLEANING	Ea = 1/Each												
BEER BTL Founders KBS	Case = 24/Each												
BEER BTL Magic Hat IPA	Case = 24/Each												
BEER BTL Stash IPA	Case = 24/Each												
BREAD Burger Buns	CS = 24/Each												
BROCCOLI Florets	CS = 17/lb												
CELERY Stalk	CS = 50/lb												
CHEESE Brie	CS = 15/lb												
CHEESE Gouda	Block = 5/lb												

*(for training purposes, I had an example from a past guide in Excel already established, items may not be in the exact order as previous screenshot in this Guide, the order will maintain to Excel when you follow these steps).

Once you have the order guide format you prefer, use that guide to walk around your restaurant and

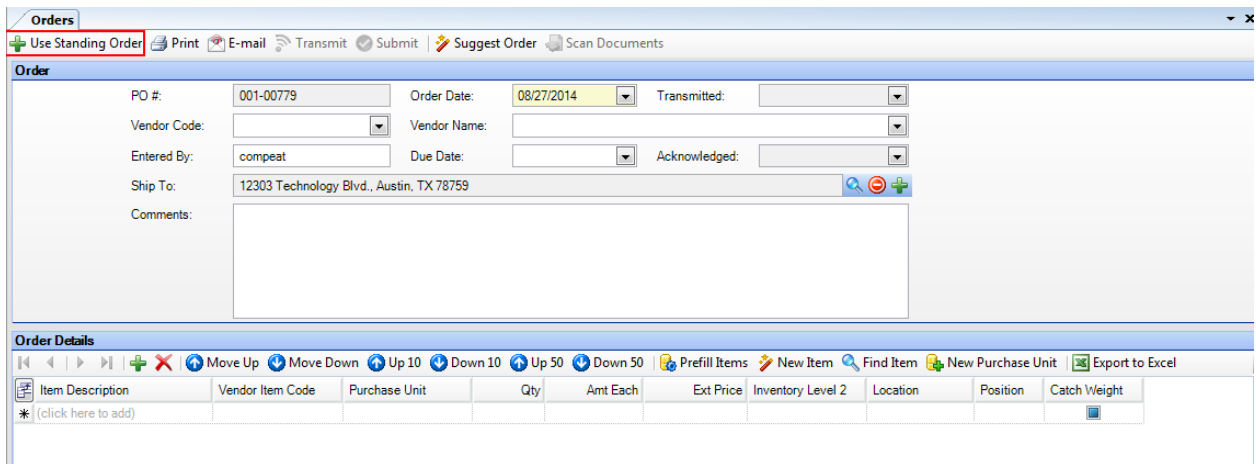
write down how many of each item you need to order by purchase unit. Once you are satisfied with your amounts to orders, navigate to Orders in Compeat:

Transactions → Orders:

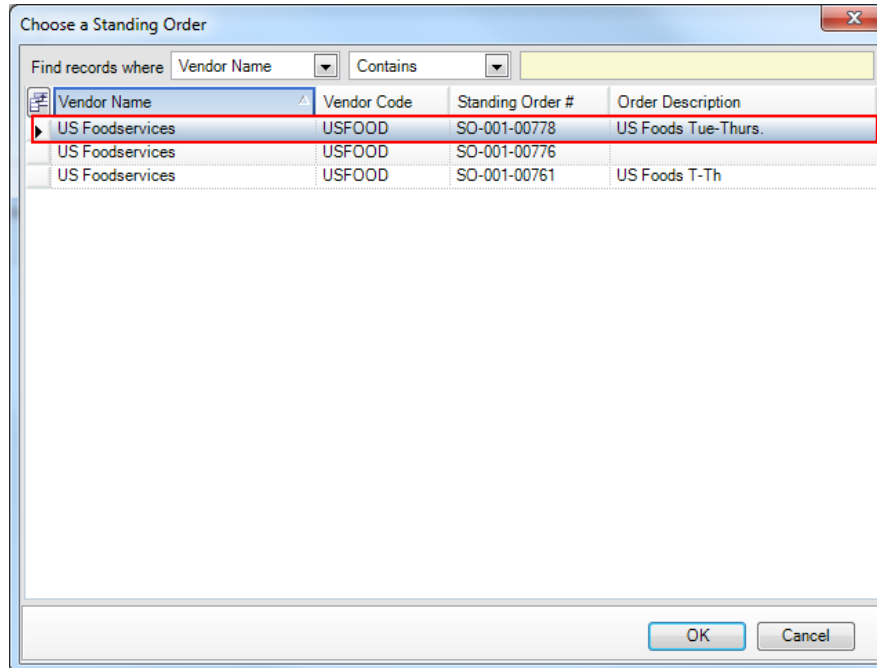


(Click New Record if applicable).

At the top of the Orders screen, click the “Use Standing Order” button:



Choose the Standing Order at hand and the screen will prefill with all items that are associated with the Standing Order template itself:



Orders (edited)

Use Standing Order
 Print
 E-mail
 Transmit
 Submit
 Suggest Order
 Scan Documents

Order

PO #: 001-00780 Order Date: 08/27/2014 Transmitted:
 Vendor Code: USFOOD Vendor Name: US Foodservices
 Entered By: compeat Due Date: 8/28/2014 Acknowledged:
 Ship To: 12303 Technology Blvd., Austin, TX 78759
 Comments: No Deliveries between 11am and 2pm

Order Details

Move Up Move Down Up 10 Down 10 Up 50 Down 50 Prefill Items New Item Find Item New Purchase Unit Export to Excel

Item Description	Vendor Item Code	Purchase Unit	Qty	Amt Each	Ext Price	Inventory Level 2	Location	Position	Catch Weight
▶ BEER BTL 512 Pecan Porter	497984	Case = 24/Each		\$22.930	\$0.00	Bottle Beer	Beer Cooler	6	<input type="checkbox"/>
PASTA Linguine		Case = 25/lb			\$0.00	Grocery/Dry Goods	Dry Storage		<input type="checkbox"/>
ARTICHOKE Hearts	1327055	Case = 18/Kilo		\$15.000	\$0.00	Grocery/Dry Goods	Dry Storage	1	<input type="checkbox"/>
BERRIES Blackberries	136625	Case = 12/1/2 Pint		\$18.880	\$0.00		Produce Cooler	1	<input type="checkbox"/>
BEEF Tenderloin W/hi		Case = 40/lb			\$0.00	Meat	Walk In		<input checked="" type="checkbox"/>
PORK Loin Bulk		Loin = 5/lb		\$23.550	\$0.00	Meat	Walk In		<input checked="" type="checkbox"/>
WATERMELON		Each = 1/Each			\$0.00	Produce	Walk In		<input type="checkbox"/>
BEEF Porterhouse Steak	6599977	CS = 45/lb		\$494.910	\$0.00	Meat	Walk In	3	<input checked="" type="checkbox"/>
BREAD Wheat Loaf	0827428	CS = 10/Loaf (15sl)		\$28.300	\$0.00	Grocery/Dry Goods	Z-Storage Shelf	75	<input type="checkbox"/>
CELERY Stalk	213841	CS = 50/lb		\$65.250	\$0.00		Z-Storage Shelf	83	<input type="checkbox"/>
CHEESE Brie	45654	CS = 15/lb		\$12.000	\$0.00	Dairy	Z-Storage Shelf	84	<input type="checkbox"/>
CHEESE Gouda	661491	Block = 5/lb		\$10.325	\$0.00	Dairy	Z-Storage Shelf	86	<input checked="" type="checkbox"/>
CHEESE Mozzarella Fresh W...	5640F	CS = 6/lb		\$6.000	\$0.00	Dairy	Z-Storage Shelf	97	<input checked="" type="checkbox"/>
CHEESE Provolone Slice	47855	CS = 16/Pack(12)		\$19.560	\$0.00	Dairy	Z-Storage Shelf	99	<input type="checkbox"/>

The template has been imported, and now you can transfer what you have written down on your hand-written order guide straight to the screen. Since both the paper guide and the screen itself are in the same order, now it becomes a matter of how fast you can 10-Key in the numbers.

Once you have finished with quantity entry, save the order and then send to your vendor with your preferred method: print/fax; email; or transmit directly.