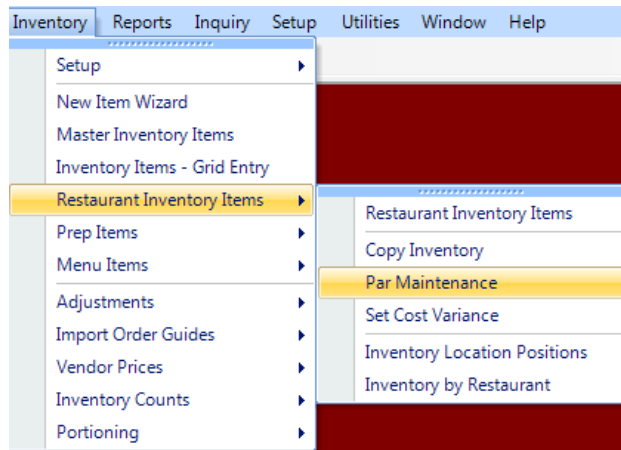


Suggest Order by Par Level

A very useful tool in Compeat is the ability to have the software suggest an order based on a pre-determined par level on each item and at the same time, suggesting the lowest priced vendor on bid items.

To utilize this feature ongoing par maintenance is required. To setup the par levels for each inventory item in question, navigate to:

Inventory → Restaurant Inventory Items → Par Maintenance



Once in this screen, you will need to load in items by either an Inventory Level or Vendor. Once you select the desired method for import, click the “Load Records” button to populate the list:

Par Maintenance

Save Changes

Inventory Level Filters

Level 1: [] Level 2: Bottle Beer Level 3: []

Vendor: [] **Load Records**

Pars

B/V/L Produce US Foods Sysco

FoodSup Paper Misc

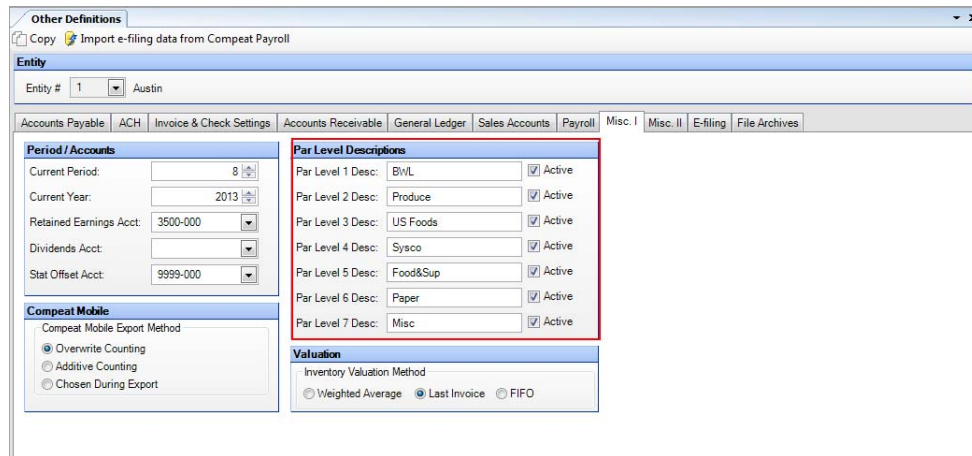
Inventory Pars

Export to Excel

Item #	Item Description	Inventory Unit	Purchase Unit	Stock	Reorder
2186	BEER BTL 512 Pecan Porter	Each	Case = 24/Each	48	24.00
45	BEER BTL Amber	Each	CS = 24/Each	48	24.00
2137	BEER BTL Amstel Lt	Each	CS = 24/Each	48	24.00
2088	BEER BTL Austin Amber	Each	CS = 24/Each	48	24.00
17	BEER BTL Bud Light	Each	Case 24 = 24/Each	48	24.00
14	BEER BTL Budweiser	Each	12 Pack = 12/Each	48	24.00
42	BEER BTL Choclat	Each	Case = 24/Each	24	6.00
22	BEER BTL Corona	Each	Case = 40/Each	24	12.00
38	BEER BTL Corona Light	Each	Case = 24/Each	48	6.00
2111	BEER BTL Dogfish Head Amber	Each	CS = 24/Each	48	24.00
34	BEER BTL DOS XX	Each	12 Pack = 12/Each	24	6.00
35	BEER BTL DOS XX Amber	Each		49	6.00
79	BEER BTL Firemans #4	Each	6 Each = 6/Each	24	6.00
61	BEER BTL Founders KBS	Each	Case = 24/Each	48	24.00
2150	BEER BTL Heniken	Each	Case = 24/Each	48	24.00
55	BEER BTL LeftHand Milk Stout	Each	Case 12 = 12/Each	24	12.00
54	BEER BTL Lugenes Choc MS	Each	6 Each = 6/Each	48	12.00
57	BEER BTL Magic Hat IPA	Each	Case = 24/Each	24	6.00
103	BEER BTL Magic Hat Red Ale Bot	Each	Case = 24/Each	24	6.00
104	BEER BTL Magic Hat Summer Ale	Each	18 Pack = 18/Each	24	6.00
2292	BEER BTL Moose Drool	Each	Case = 24/Each		
80	BEER BTL Rheingold Stout	Each	Case = 24/Each	24	6.00
65	BEER BTL Stash IPA	Each	6 Each = 6/Each	24	6.00
29	BEER KEG Amstel Lt	Each	Case = 24/Each	48	24.00
75	BEER KEG Bud Light	Each	6 Each = 6/Each	48	24.00
56	BEER KEG Newcastle	Each	6 Each = 6/Each	24	6.00

Each Inventory Item loaded into this screen can be associated with any of the 7 Par Lists. To turn on or off the par lists in question, use the check boxes at the top of the screen to display or remove from display. (These par level names are established in Other Definitions: Misc. I tab):

Navigate to Setup → Other Definitions. Click on the Misc. I tab. (these are entity specific).



Here you will set a Stock and Reorder level. The Stock is the amount you would like to have on your shelf after the order (in other words, “order me up to 48”). The reorder is the trigger or threshold for Compeat to suggest the order (in other words, when I get at or below this number, order me up to my stock number).

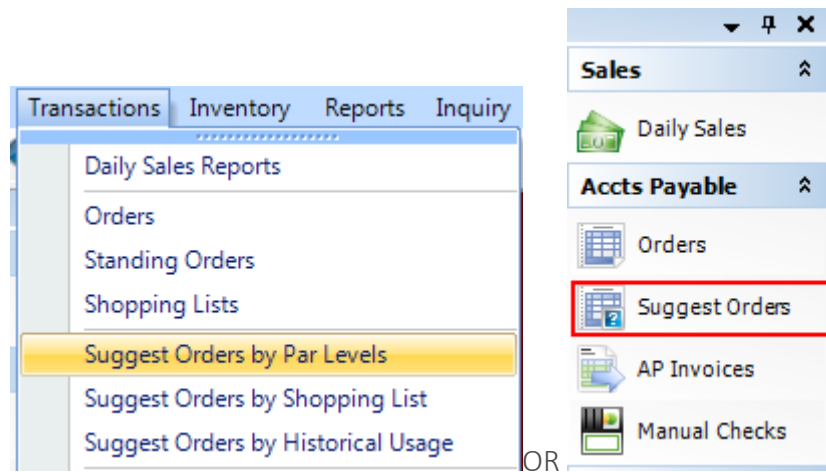
For this specific instance, my 512 Pecan Porter will trigger an order when I get at or below 24 bottles on hand, and Compeat will suggest to order up to 48 bottles (2 Cases).

Item #	Item Description	Inventory Unit	Purchase Unit	Stock	Reorder
2186	BEER BTL 512 Pecan Porter	Each	Case = 24/Each	48	24.00
45	BEER BTL Amber	Each	CS = 24/Each	48	24.00
2137	BEER BTL Amstel Lt	Each	CS = 24/Each	48	24.00

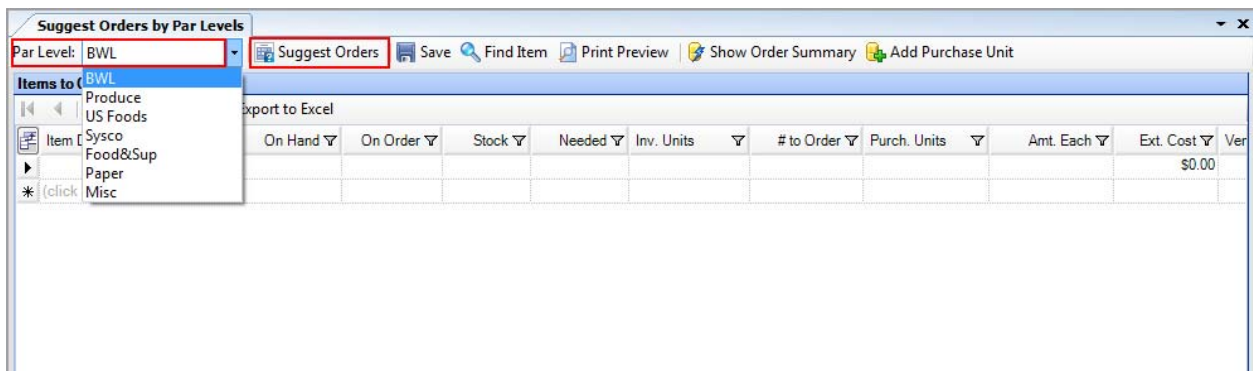
One note about this screen: notice the Stock and Reorder numbers are in terms of Inventory Units, not Purchase Units. Compeat will do the math to purchase units based on the vendor selected at the time of suggestion, but since purchase units can vary based on vendor or time of year, Compeat wants this number reduced down to the unchanged Inventory Unit.

To use these par levels, navigate to Suggest Order by Par Level:

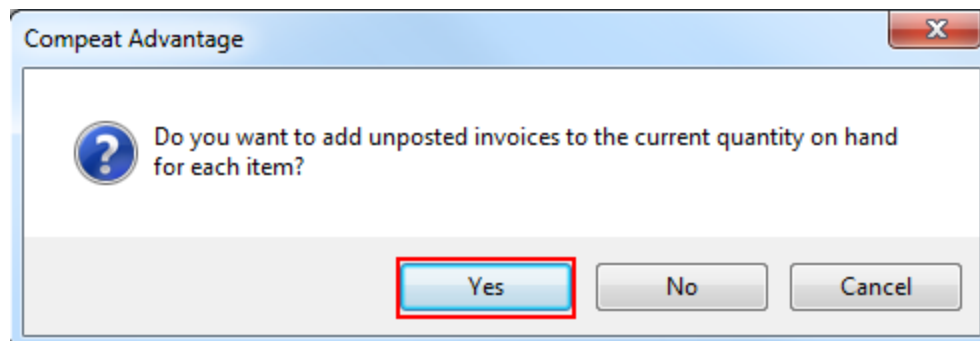
Transactions → Suggest Order by Par Level or Use the Quick Link in the Toolbar:



Once in this screen, select the Par Level you would like to have suggestions based on and click "Suggest Orders"



Compeat will ask if you would like to include unposted invoices:



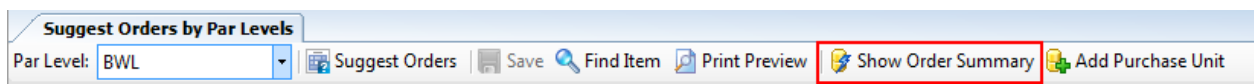
It is recommended to click "Yes" so Compeat will use any unposted invoices when determining a theoretical quantity on hand.

Compeat will run the calculations and suggest a # to Order based on the par levels setup in the last screen and the theoretical quantity on hand. Notice Compeat also suggests the vendor if it is either a bid winner or preferred vendor (in that order).

Item Description	On Hand	On Order	Stock	Needed	Inv. Units	# to Order	Purch. Units	Amt. Each	Ext. Cost	Vendor
BEER BTL 512 Pecan Porter	74.00	0.00	48	0	Each		Case = 24/Each	\$57.00	\$0.00	Republic Beverage
BEER BTL Amstel Lt	84.00	0.00	48	0	Each		CS = 24/Each	\$20.00	\$0.00	Republic Beverage
BEER BTL Austin Amber	0.00	0.00	48	48	Each	2	CS = 24/Each	\$41.56	\$83.12	Republic Beverage
BEER BTL Bud Light	108.00	0.00	48	0	Each	0	Case 24 = 24/Ea.	\$27.50	\$0.00	Spec's Liquor
BEER BTL Budweiser	0.00	0.00	48	48	Each	2	Case = 24/Each	\$30.24	\$60.48	Republic Beverage
BEER BTL Chochoat	0.00	0.00	24	24	Each	1	Case = 24/Each	\$42.99	\$42.99	Spec's Liquor
BEER BTL Corona	52.00	0.00	24	0	Each	0	Case = 24/Each	\$35.65	\$0.00	Republic Beverage
BEER BTL Corona Light	0.00	0.00	48	48	Each	2	Case = 24/Each	\$28.69	\$57.38	Republic Beverage
BEER BTL Dogfish Head Am.	0.00	0.00	48	48	Each	2	CS = 24/Each	\$35.69	\$71.38	Republic Beverage
BEER BTL DOS XX	0.00	0.00	24	24	Each	1	Case = 24/Each	\$34.56	\$34.56	Republic Beverage
BEER BTL DOS XX Amber	0.00	0.00	49	49	Each	3	Case = 24/Each	\$34.56	\$103.68	Republic Beverage
BEER BTL Firemans #4	0.00	0.00	24	24	Each	1	Case = 24/Each	\$25.39	\$25.39	Republic Beverage
BEER BTL Founders KBS	0.00	0.00	48	48	Each	2	Case = 24/Each	\$35.46	\$70.92	Republic Beverage
BEER BTL LeftHand Milk Sto.	12.00	0.00	24	12	Each	1	Case 24 = 24/Ea.	\$42.79	\$42.79	Spec's Liquor
BEER BTL Lugenes Choc MS	0.00	0.00	48	48	Each	2	Case = 24/Ea.	\$38.96	\$77.92	Republic Beverage
BEER BTL Magic Hat IPA	0.00	0.00	24	24	Each	1	Case = 24/Each	\$37.89	\$37.89	Republic Beverage
BEER BTL Magic Hat Red AL	0.00	0.00	24	24	Each	1	Case = 24/Each	\$39.85	\$39.85	Spec's Liquor
BEER BTL Magic Hat Summ.	0.00	0.00	24	24	Each	1	Case = 24/Each	\$37.15	\$37.15	Spec's Liquor
BEER BTL Stash IPA	0.00	0.00	24	24	Each	1	Case = 24/Each	\$29.85	\$29.85	Republic Beverage
BEER KEG Amstel Lt	0.00	0.00	48	48	Each	2	Case = 24/Each	\$37.80	\$75.60	Republic Beverage
BEER KEG Budweiser	3.00	0.00	3	0	keg (15.5g)	0	Keg = 1/keg (15...	\$56.23	\$0.00	Republic Beverage
BEER KEG Newcastle	0.00	0.00	24	24	Each	1	Case = 24/Each	\$34.23	\$34.23	Republic Beverage
SCOTCH Chivas Regal	0.00	0.00	2	2	750 mL	2	Bottle = 1/750 mL	\$31.67	\$63.34	Spec's Liquor
TEQUILA Hornitos	0.00	0.00	2	2	750 mL	1	CS = 12/750 mL	\$24.78	\$24.78	Spec's Liquor
TEQUILA Patron Silver	0.00	0.00	2	2	1 Litre	2	Bottle1L = 1/1 Lit.	\$38.90	\$77.80	Spec's Liquor
VODKA Grey Goose	12.00	0.00	2	0	1 Litre	0	Bottle = 1/1 Litre	\$24.30	\$0.00	Republic Beverage
WINE Cabernet John Hue	0.00	0.00	12	12	750 mL	1	Case = 12/750 mL	\$89.65	\$89.65	Republic Beverage
WINE Cabernet Oakland Est.	0.00	0.00	12	12	750 mL	1	Case = 12/750 mL	\$104.67	\$104.67	Republic Beverage
WINE Canyon Road Chardo.	0.00	0.00	12	12	750 mL	1	CS = 12/750 mL	\$89.52	\$89.52	Republic Beverage
WINE Cherry Creek Cab	0.00	0.00	12	12	750 mL	1	CS = 12/750 mL	\$115.90	\$115.90	Republic Beverage

A word on the pre-calculated “On Hand” amount: if you don’t trust the theoretical amount on hand Compeat generates, you can change the number in that column by taking an “Order Count”. On the order count sheet and order count screen itself you can filter by any of the 7 available par lists. Once you post the order count, this “On Hand” column will be updated with the new quantity entered in the Order Count screen.

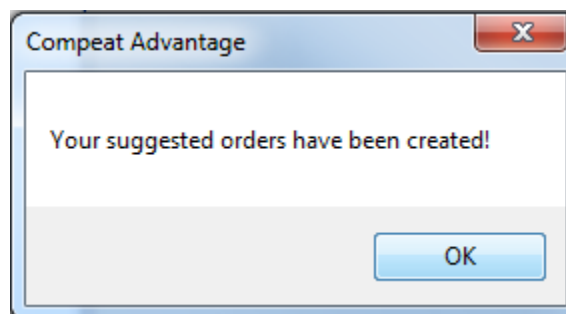
Once you are satisfied with the suggestions, click the “Show Order Summary” button. (Note, you can change pricing/vendors/and quantities directly in this screen before showing the order summary).



The screen will appear similar to the following, showing the POs that will result from pressing the “Create Orders” button. Once you are satisfied the pricing and vendors selections look good, click “Create Orders”.

Suggest Orders by Par Levels		Order Suggestions by Par Levels
Purchase orders to be created		
⏪ ⏩ ⏴ ⏵ 📄 Create Orders 🖨️ Print ✎ Edit ✖ Delete		
PO #	Vendor	Total Ext. Cost
*** UNASSIGNED ***	Republic Beverage	\$1,162.14
*** UNASSIGNED ***	Spec's Liquor	\$328.70

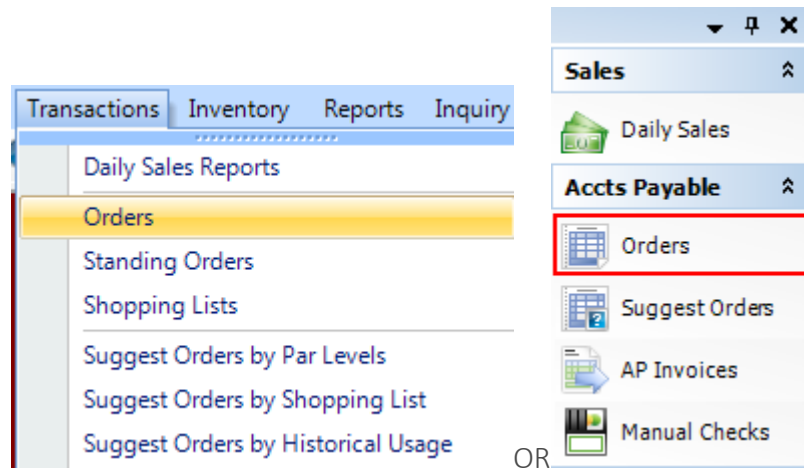
You will see the following prompt:



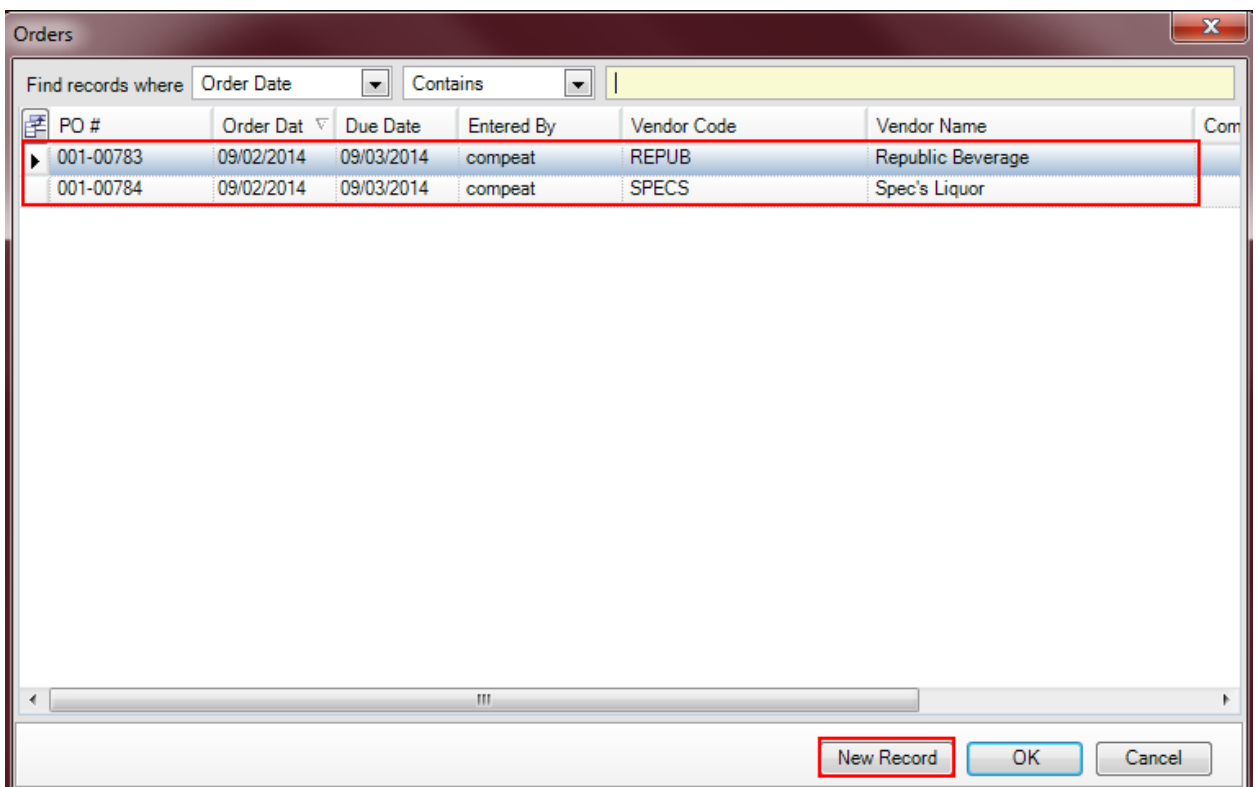
Now the ***UNASSIGNED*** Status turns into actual PO numbers that are available to submit to the vendors individually:

Suggest Orders by Par Levels		Order Suggestions by Par Levels
Purchase Orders		
⏪ ⏩ ⏴ ⏵ 📄 Create Orders 🖨️ Print ✎ Edit ✖ Delete		
PO #	Vendor	Total Ext. Cost
001-00783	Republic Beverage	\$1,162.14
001-00784	Spec's Liquor	\$328.70

Now you can navigate to the Orders screen either under Transactions → Orders or using the quick link on the toolbar:



You will notice the newly created POs are now available for review and submission.



You can still change quantities or prices on this screen before submitting to the vendor. If you realize you would like to add or subtract a case simply edit the quantity of the item in question before submitting.

Once you have reviewed the PO and have confirmed its accuracy, you can now submit it to your vendor with your preferred method of submission (Print/Fax; Email; or Direct Transmission).

The screenshot shows the 'Orders' window in the Compeat system. At the top, there are navigation buttons and a search bar. Below that, the 'Order' section contains fields for PO # (001-00783), Order Date (09/02/2014), Vendor Code (REPUB), Vendor Name (Republic Beverage), Entered By (compeat), Due Date (9/3/2014), and Ship To (12303 Technology Blvd., Austin, TX 78759). A 'Submit' button is highlighted with a red box. Below the order details is the 'Order Details' section, which contains a table of items with columns for Item Description, Vendor Item Code, Purchase Unit, Qty, Amt Each, Ext Price, Inventory Level 2, Location, Position, and Catch Weight.

Item Description	Vendor Item Code	Purchase Unit	Qty	Amt Each	Ext Price	Inventory Level 2	Location	Position	Catch Weight
WINE Cherry Creek Cab	86454	CS = 12/750 mL	1.00	\$115.900	\$115.90	Red Wine	Z-Storage Shelf	451	
WINE Canyon Road Chardon...	12331	CS = 12/750 mL	1.00	\$89.520	\$89.52	White Wine	Z-Storage Shelf	448	
BEER BTL Stash IPA	1254	Case = 24/Each	1.00	\$29.850	\$29.85	Bottle Beer	Z-Storage Shelf	68	
BEER KEG Newcastle	1251	Case = 24/Each	1.00	\$34.230	\$34.23	Bottle Beer	Z-Storage Shelf	64	
BEER BTL Magic Hat IPA	1252	Case = 24/Each	1.00	\$37.890	\$37.89	Bottle Beer	Z-Storage Shelf	53	
BEER BTL Founders KBS	1253	Case = 24/Each	2.00	\$35.460	\$70.92	Bottle Beer	Z-Storage Shelf	52	
BEER BTL Lugenes Choc MS	1248	Case = 24/Each	2.00	\$38.960	\$77.92	Bottle Beer	Z-Storage Shelf	45	
BEER BTL Firemans #4	456	Case = 24/Each	1.00	\$25.390	\$25.39	Bottle Beer	Z-Storage Shelf	41	
BEER BTL DOS XX	1240	Case = 24/Each	1.00	\$34.560	\$34.56	Bottle Beer	Z-Storage Shelf	40	
BEER BTL Austin Amber	123651	CS = 24/Each	2.00	\$41.560	\$83.12	Bottle Beer	Z-Storage Shelf	23	
BEER KEG Amstel Lt	56122135	Case = 24/Each	2.00	\$37.800	\$75.60	Bottle Beer	Z-Storage Shelf	18	
BEER BTL DOS XX Amber	1241	Case = 24/Each	3.00	\$34.560	\$103.68	Bottle Beer	Bar Reach In	2	
BEER BTL Budweiser	56654321	Case = 24/Each	2.00	\$30.240	\$60.48	Bottle Beer			
BEER BTL Corona Light	1242	Case = 24/Each	2.00	\$28.690	\$57.38	Bottle Beer			
BEER BTL Dogfish Head Am...	6511	CS = 24/Each	2.00	\$35.690	\$71.38	Bottle Beer			
WINE Cabernet John Hue	333621	Case = 12/750 mL	1.00	\$89.650	\$89.65	Red Wine			
WINE Cabernet Oakland Est...	123334	Case = 12/750 mL	1.00	\$104.670	\$104.67	Red Wine			

If you have questions on this process, please email training@compeat.com and we will be happy to reach out to guide you through the process.