

AUTO ORDER MODULE

Pre-Order Processing – Document Manager – Receiving

Every type of Ordering is facilitated from one easy to use screen, the Document Manager. Via a simple, easy-to-use pre-order process, orders can automatically reflect forecast menu needs, par and re-order points, filtered by class, category, supplier or location. Or users can access simple lists and shopping lists with quantities already entered. Site managers can edit and round up or down to the nearest purchase or usage unit.

Managers can create a pre-order that can be saved, edited and then processed once complete and accurate. Processing the pre-order automatically creates Requisitions for district approval, Supply Orders to the warehouse and Purchase Orders to outside vendors, all based on a pre-assigned setting in each item.

Pre Order

Delivery Details

Order Id: -- Status: Delivery Date: 02/11/2007

Priority: Normal Delivery

Remarks:

Rounding: Round Up Percentage Select:

Add Item: Qty: Purchase Unit: *

Requisition - Items for Purchase

Select	Item Code	Item Name	Description	Qty	Purchase Unit	Remarks
<input type="checkbox"/>	1084	MILK,LOWFAT,1%		5.00	1 Ea / Ea - 50 Ea / Case	
<input type="checkbox"/>	4724	MILK,CHOCOLATE LOWFAT		6.00	1 Ea / Ea - 50 Ea / Case	
<input type="checkbox"/>	1016	CHEESE,COTTAGE,LOWFAT,1% MILKFAT		2.00	1 Lb / Lb - 1 Lb / Pound	
<input type="checkbox"/>	18069	BREAD,WHITE,COMMLY PREP (INCL SO		12.00	1 Lf / Lf - 1 Lf / Loaf	
<input type="checkbox"/>	18353	ROLLS,HARD (INCL KAISER)		10.00	1 RI / RI - 12 RI / Bag	
<input type="checkbox"/>	18364	TORTILLAS,RTB OR -FRY,FLR 6" .9 oz ea		20.00	1 Dz / Dz - 1 Dz / Dozen	
<input type="checkbox"/>	4649	KNIFE, DISPOSABLE	1000 ea/case, par ...	1.00	1 Ea / Ea - 1000 Ea / ...	
<input type="checkbox"/>	4650	SPOON, DISPOSABLE	1000 ea/case, par ...	1.00	1 Ea / Ea - 1000 Ea / ...	
<input type="checkbox"/>	4647	FORK, DISPOSABLE	1000 ea/case, par ...	1.00	1 Ea / Ea - 1000 Ea / ...	
<input type="checkbox"/>	4633	SPORK KIT	1000 ea/case, par ...	1.00	1 Ea / Ea - 1000 Ea / ...	
<input type="checkbox"/>	4643	CUPS, SQUAT 4 OZ	1000 ea/case, par ...	1.00		
<input type="checkbox"/>	4644	CUPS, SQUAT 8 OZ	1000 ea/case, par ...	1.00		
<input type="checkbox"/>	4625	FOIL, ALUMINUM	par item	1.00		
<input type="checkbox"/>	4626	FILM, PLASTIC	par item	1.00		

Windows Internet Explorer

Process Result:
 Order Id 1865 Type Requisition Order Created
 Order Id 1866 Type Supply Order Created
 Order Id 1867 Type Purchase Order Created
 Order Id 1868 Type Purchase Order Created

Document Manager

Users can control and monitor all ordering and receiving activity in the Document Manager. View, delete, edit (if still in draft mode) and cancel or reverse. Suppliers and due dates are clearly marked. Click the top of any column to sort by column heading.

Document Manager							
Close Approve Submit							
Requisition Purchase Order Transfer Receiving Preorder Supply Requisition							
Vi... D...	Edit	Document Type	Supplier	Destination Site	Document Status	Due Date	
		Requisition		North High School	Approved	02/11/2007	
		Supply Requisition	Warehouse	North High School	On Order	02/11/2007	
		Purchase Order	Dairy Company	North High School	Wait2BReceived	02/11/2007	
		Purchase Order	Bakery Company	North High School	Partially Received	02/11/2007	
		Requisition		North High School	Pending	02/11/2007	
		Purchase Order	Primary Grocery	North High School	Manage By District	01/16/2007	
		Supply Requisition	Warehouse	North High School	On Order	01/16/2007	
		Supply Requisition	Warehouse	North High School	Draft	01/16/2007	

Receiving Screen

Enter the invoice number, check the vendor item code, edit any amounts received that are different than the amount ordered, add last minute ordered items, reject broken or spoiled items and record reason.

ReceivingOrder -- Webpage Dialog

Order Lines

General Details

Order Id	--	Status	Draft	Vendor	Bakery Company / 4
Received Date	02/04/2007	Invoice Number	5463	Ordered Total Qty	42
Ordered Total Cost \$	55.6200	Received Total Qty	42	Received Total Cost \$	55.6200

Add Item Quantity Purchase Unit

Received Items - Received Items

Item Code	Supplier Item Code	Item Name	Ord ...	UOM	Total Ord...	Unit Pri..	Purchase...	Extended...	Rcv Qty	Rcv UOM
18353	12345	ROLLS,HARD (INCL KAL...	10.00	1 RI / RI - 12 RI / Bag	120.00	0.21400	2.5730	25.7300	10.00	1 RI / RI - 12 RI / Bag
18364	1234	TORTILLAS,RTB OR -FRY...	20.00	1 Dz / Dz - 1 Dz / Dozen	20.00	0.59300	0.5935	11.8696	20.00	1 Dz / Dz - 1 Dz / Dozen
18069	123	BREAD,WHITE,COMMLY...	12.00	1 Lf / Lf - 1 Lf / Loaf	12.00	1.50200	1.5019	18.0228	12.00	1 Lf / Lf - 1 Lf / Loaf
				1 Lf / Lf - 1 Lf / Loaf			1.00			11.00

Partially received orders automatically create back orders (if allowed by the district) or can be closed by the user.

Rejected items can be recorded and subtracted from the receiving screen along with documentation of reason.

- Clear -

Breakage

Date Expired

Incorrect Item

Seal Broken