



Create a New Order Schedule

Background: The Schedules option can analyze menus and par items for a given date range and assemble a list of all the ingredients required. Schedules can also provide suggested purchase quantities based on menu requirements, Par/Reorder, and/or On Hand. You may also use this function to build an Order Schedule from “scratch.”

To Do and Notice:

1. Navigate to **Purchasing** and select **Schedules**.
2. Select **New Order Schedule**.
3. Enter/select the following:
 - Unit (drop-down list) – Unit within the facility that places the purchase orders with the vendor(s)
 - Requirement Date – Dates that items are required for menu service and production needs
 - # of Days – Length of the date range, starting from Requirement Date, that you want the system to consider
 - Description (optional) – Title or description for the order
 - # of Days to Look Ahead – How many days beyond the date range (specified via Requirement Date and # of Days) the system should check service menus for items
 - Include all par stocked Items? – Check to include every item that has a par value recorded and a reorder point
 - Ignore OnHand? – Check to tell the system to disregard a recorded/calculated OnHand value
4. Click **Filter by Vendor** if you want only items sold by selected Vendors
5. Choose one of the follow to **Create based on**:
 - **From Blank** – Order schedule starts with no items and you build “from scratch”
 - **From Requirements** – Order schedule includes all the ingredients needed to produce the menus for all meals in the selected date range, produced by the unit selected
 - **From Item Selection** – Will select items to order from a search page or if you only want to order par stocked items

Notice: The Order Schedule will not include any items marked as “Exclude from Order Requirement” on the **Purchasing** tab in **Item Maintenance** – e.g., tap water.

6. Make any required changes to the items.

Notice: See the Modify an Order Schedule Quick Guide for details on editing the Order Schedule.

- 1) **Add Items** – Click Add Items button to add items to the Order Schedule
- 2) **Delete Checked** – Click the box in front of the Item you wish to delete, then click the Delete Checked button
- 3) **Delete All** – Click to delete all items from the schedule
- 4) **Filter** – Allows you to narrow down the information displayed on the page

7. Click Save.

Create Orders

8. Click on the **Create Orders** button in the upper right-hand corner of the screen.

Notice: Several Orders will likely be created based on the schedules, vendors, and also vendors' order/delivery schedule.

9. Enter the desired search criteria in the Open Orders window:

- | | |
|-----------------|--------------------|
| 1) Unit | 4) Dates |
| 2) Vendor Name | 5) PO Number |
| 3) Order Status | 6) Click Go |

10. Click **Done**.

Notice: See the **Print Order Schedule Reports** Quick Guide for instructions on running and Printing Order Schedules.

So What? Based on the analysis performed by the Schedules function, the order schedule lists an "order amount" (the suggested quantity to order to meet the anticipated needs) for each item and determines order/delivery dates.
