


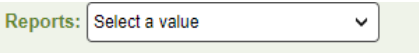




## Create Purchase Order

Background: The Order Worksheet is a tool to create a purchase order based on your US Foods delivery days. The Order Worksheet can be created for a certain date or date range of your current cycle menu. It also lists the needed quantity of each menu item based on your census and shelf count of items.

*Note: It is recommended to Create a Shopping List from Menu first to review the default products selected. Refer to 'Create Shopping List' and 'Vendor Item Review & Primary Vendor Item' Quick Guides.*

### Steps:

1. Navigate to **Purchasing** and select  **Order Worksheet**.
2. Click **New** in the top right corner.
3. Fill out the following information in these areas:
  - a. **Description:** A title or description for this purchase order
  - b. **Unit:** Select the name of your facility
  - c. **Vendor:** Select the name of your US Foods division
  - d. Select your **Delivery Date**  : The date that you expect the items to be delivered
  - e. Select your **Date Range**  : The system will analyze your menu for the selected date range and list all items needed for those dates.
  - f. Click **Create** in the top right corner.
4. Above the list of items, the page displays information about the order worksheet – **Unit, Vendor, Delivery Date, Covering these Dates**.
5. The **Reports** dropdown to the right  contains a list of reports that can be used to verify the shelf count of the items.
  - a. The **Order Worksheet** report displays a list of all items on the worksheet. This report can be taken to the storage locations at your facility to verify shelf counts and then enter the quantities of those items on the worksheet.
6. The list of items are sorted by **Product Group**. Click the arrows to left  of each **Product Group** to expands the list of items contained within the grouping.
  - a. Click on the  **Star Icon** located to the left of the item to display the date and meal that ingredient in a recipe on your menu.

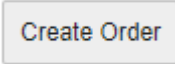
- b. **Qty Needed** Column displays the quantity of the ingredient that is needed to satisfy production for the date range entered.
- c. **Shelf Count** Column displays the calculated shelf count based on the items On Order quantity and menu needs within the past 7 days. A different shelf count can be entered here which will be used by the system to adjust the recommended **Order Quantity**.
- d. **Stock Unit** Column shows the default counting unit for the item. You can select a different stock unit from the drop-down list as it applies to the shelf count.
- e. **Order Quantity** Column shows a rounded order quantity calculated based on requirements for the worksheet, calculated for delivery days. You can enter a different order quantity if needed.
- f. **Purchase Unit** Column shows the item’s default purchase unit as it applies to the order quantity.

**Add Items**

1. Click the **Add Items** button if you wish to add any additional items to the Order Worksheet.
2. Enter the name of the Item in the **Name** box.
3. Click **Go**.
4. Click the checkbox in front of the desired items.
5. Click **Done**.
6. Click **Save**.

**Delete Items**

1. Click the checkbox in front of the Item you wish to delete.
2. Click the **Delete Checked** button.
3. Click **Save**.

7. When you are finished editing the **Order Worksheet**, click  **Create Order** at the upper right of the page. This will create a single purchase order to your US Foods vendor and launch the *Edit Order* page where you can review, edit, and place the order directly with USFoods.com.