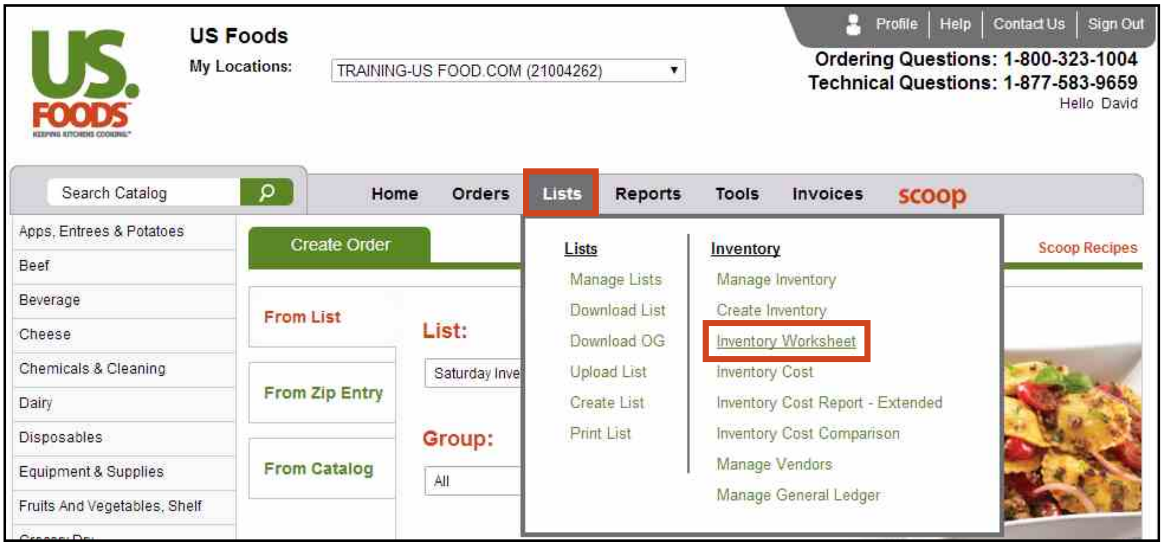
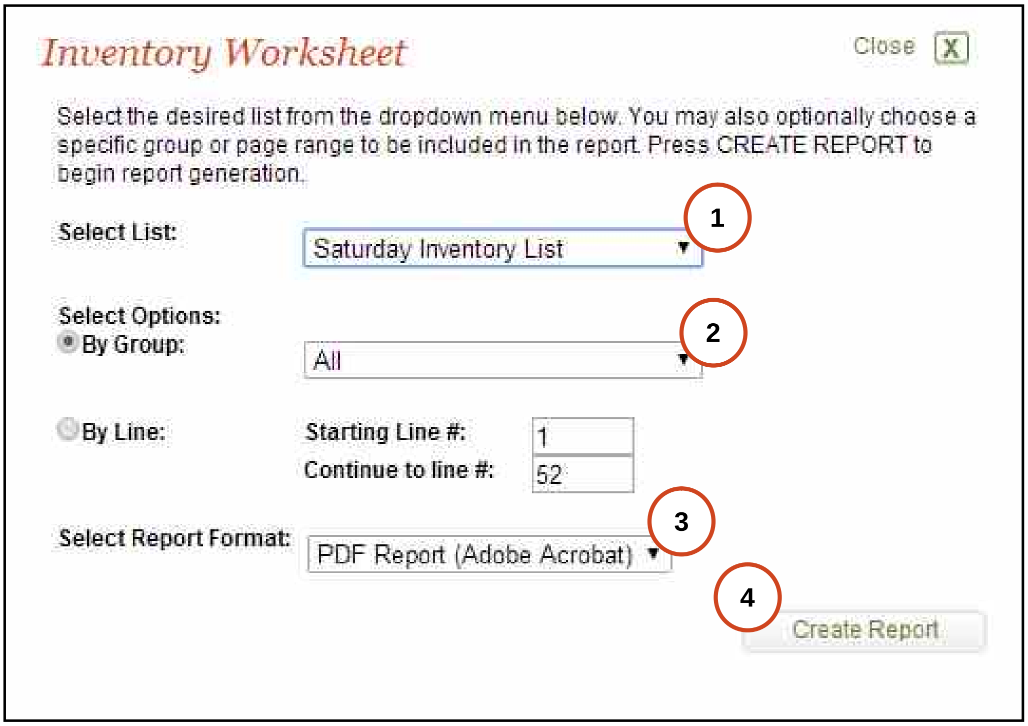
Inventory with US Foods Online

Sections

Printing an Inventory Worksheet



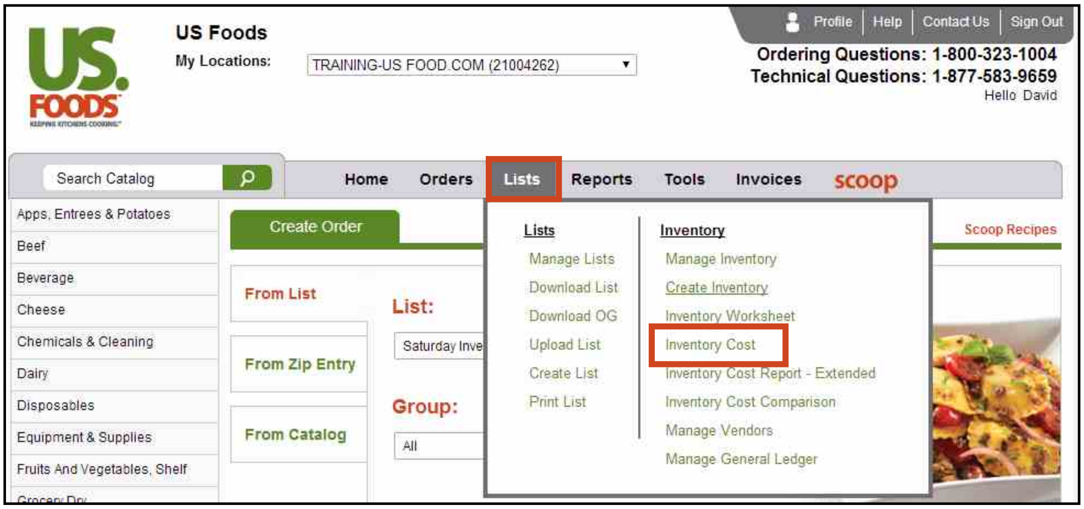
Begin by selecting **Lists** from the horizontal navigation bar, and then selecting **Inventory Worksheet** on the right hand side of the menu.



A dialog box will appear.

1. Select your list that you would like to use to count your inventory.
2. You also have the option of selecting a single group or a particular line number sequence.
3. Select PDF or CSV format.
4. Click **Create Report**. Your download will start immediately.

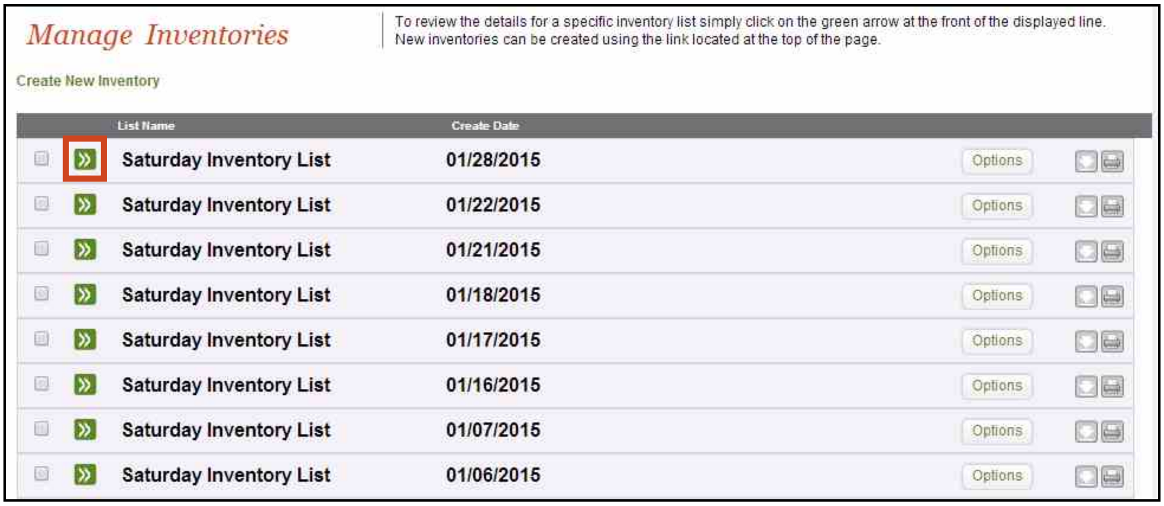
Inputting Inventory Quantities



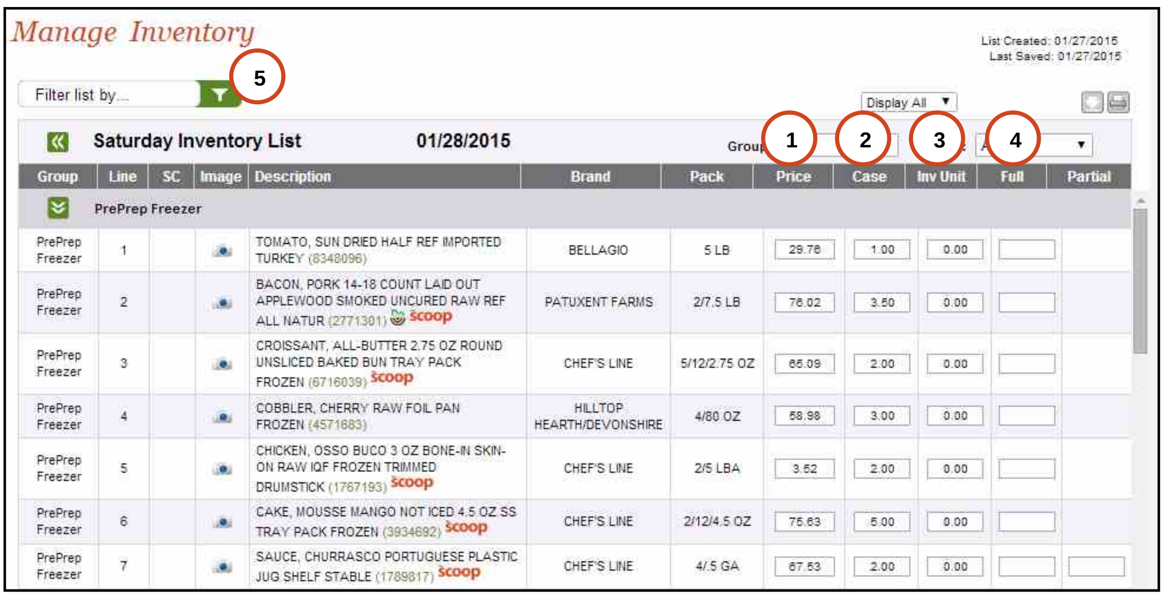
Begin by selecting **Lists** from the horizontal navigation bar, and then selecting **Inventory Worksheet** on the right hand side of the menu.

A **dialog box** will appear.

1. Select the correct location (and department if necessary) for which you would like to generate inventory quantities.
2. Select the **shopping list** that you would like to use to generate inventory quantities.
3. Select the **list creation date** (inventory date) from the dropdown calendar menu.
4. Click **create.**



A page will open showing the inventories that have been created for this customer number. Select the **green arrow button** next to the inventory list for which you would like to enter quantities.

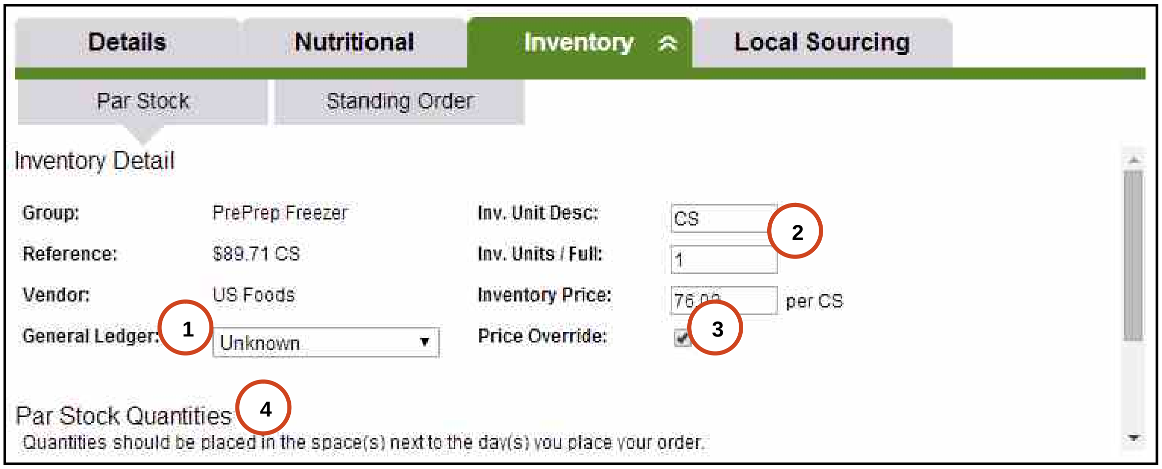


A page will open allowing you to begin entering cases and inventory unit quantities for the products on this shopping list.

1. The price field automatically populates with the pricing that was in place *when this inventory list was created.*
2. The **Case** field is used to input case quantities. This field will accept partial case quantities using decimals.
3. The **Inv Unit** field is used to input inventory unit quantities. These inventory units can be adjusted by clicking the **green product number** next to the product you would like to adjust. (More detail to follow)
4. You have the option of inputting order quantities simultaneously using the full and partial fields.
5. You are able to filter this list by using this field at any time.

There are a few options at the **bottom** of the created inventory.

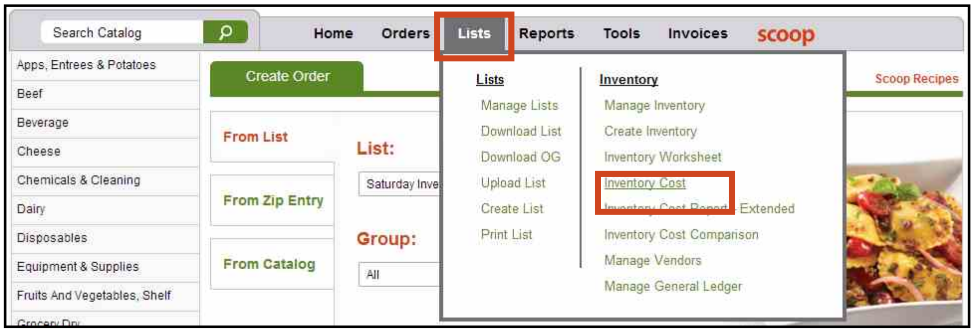
1. By clicking **Create New Inventory**, you can start another inventory list using a different shopping list or a different date.
2. By clicking **Get Price**, you can repopulate the price field with pricing that is currently in the system.
3. By clicking **Clear,** you can clear case or inventory unit quantities that have been entered for this inventory date.
4. If you have created par stock quantities for specific items and entered inventory values, you can click **Create Par Order** to enter order quantities automatically based on those pars and inventory values.
5. If you have entered order quantities or created a par order, you can click **Review Order** to review and submit your order.



If you click the **Green Product Number** next to any product in the inventory list, you can edit a number of inventory parameters for each product in this dialog box that will appear.

1. If you have created **General Ledger** categories, you can assign them here.
2. You can adjust **Inventory Unit Description** and **Inventory Unit** calculation in these fields.
3. You can adjust the **Inventory Price** by using the **Price Override** checkbox and inputting a new price in this field. *THIS WILL ONLY CHANGE THE PRICE FOR INVENTORY CALCULATION. IT WILL NOT CHANGE THE PRICE CHARGED FOR THE ITEM.*
4. You can input **Par Stock Quantities** by delivery day in these fields.

Generating Inventory Cost

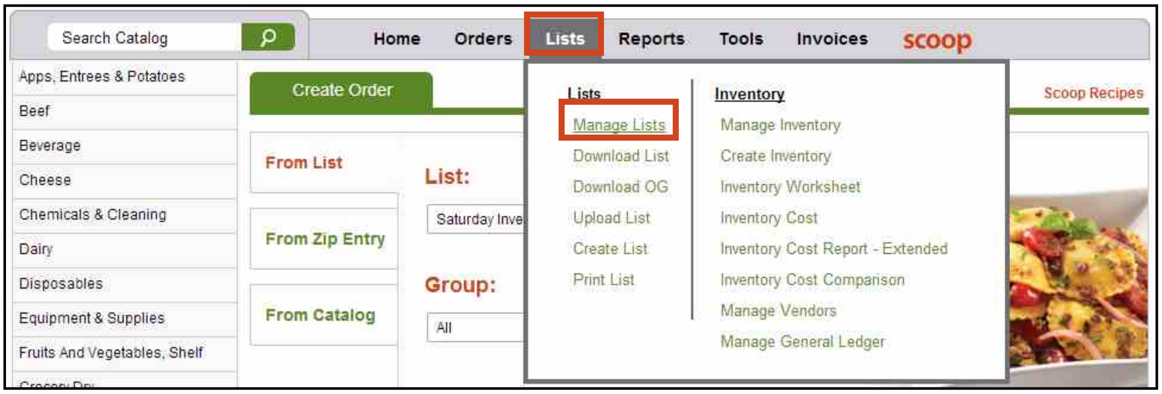


Begin by selecting **Lists** from the horizontal navigation bar and selecting **Inventory Cost** from the right side.

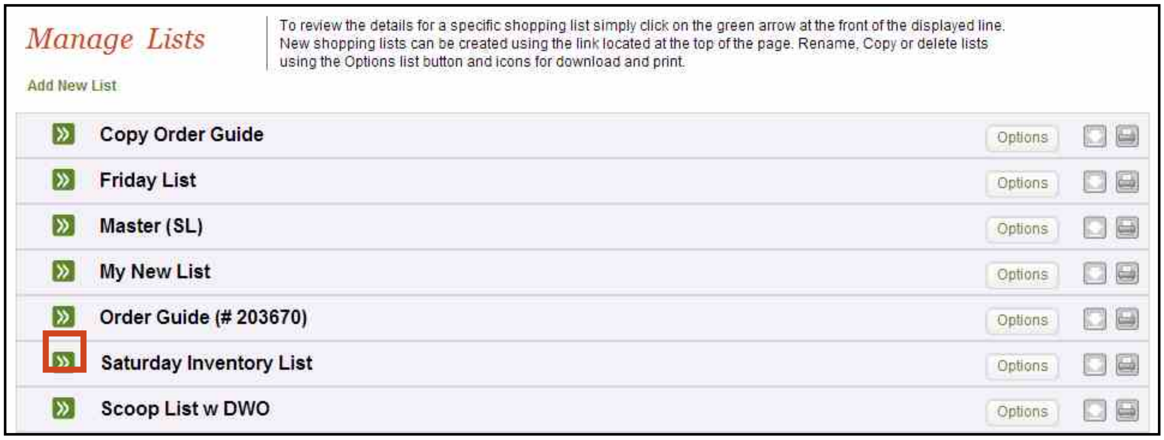
A dialog box will appear, allowing you to set parameters for the **Inventory Cost Report.**

1. Begin by selecting the **Date** for which you would like generate an inventory cost.
2. In **Select Inventory,** you have the option of generating total costs for one specific inventory list, or you can generate costs for all of the lists with an inventory created on the selected date.
3. Using the **Report Format** dropdown, you can choose to create a PDF or a CSV file for use in spreadsheet programs like Microsoft Excel.
4. You can **Sort By** different parameters using this dropdown menu. This includes alphabetical, general ledger code or subtotaled by group.
5. **Create Report** by clicking, and your download will begin immediately.

Adding a Non US Food Product

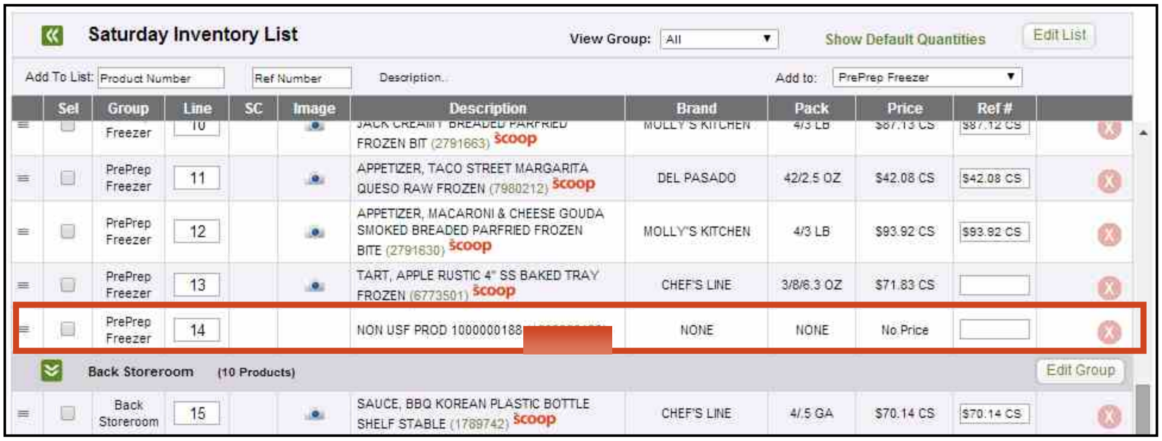


Begin by selecting **Lists** from the horizontal navigation bar and selecting **Manage Lists** from the left hand side.



Select the list you would like to add a Non US Food Product to and click the **Green Arrow Button** next to that list name.

Determine the group that will contain the new Non US Food Product and click the **Edit Group** button next to that group header, and the click **Add Non-Usfood Product.**



The page will reload, and at the bottom of the specified group you will see a placeholder product. Click the **Green Product Number** next to that product to enter in the product information.

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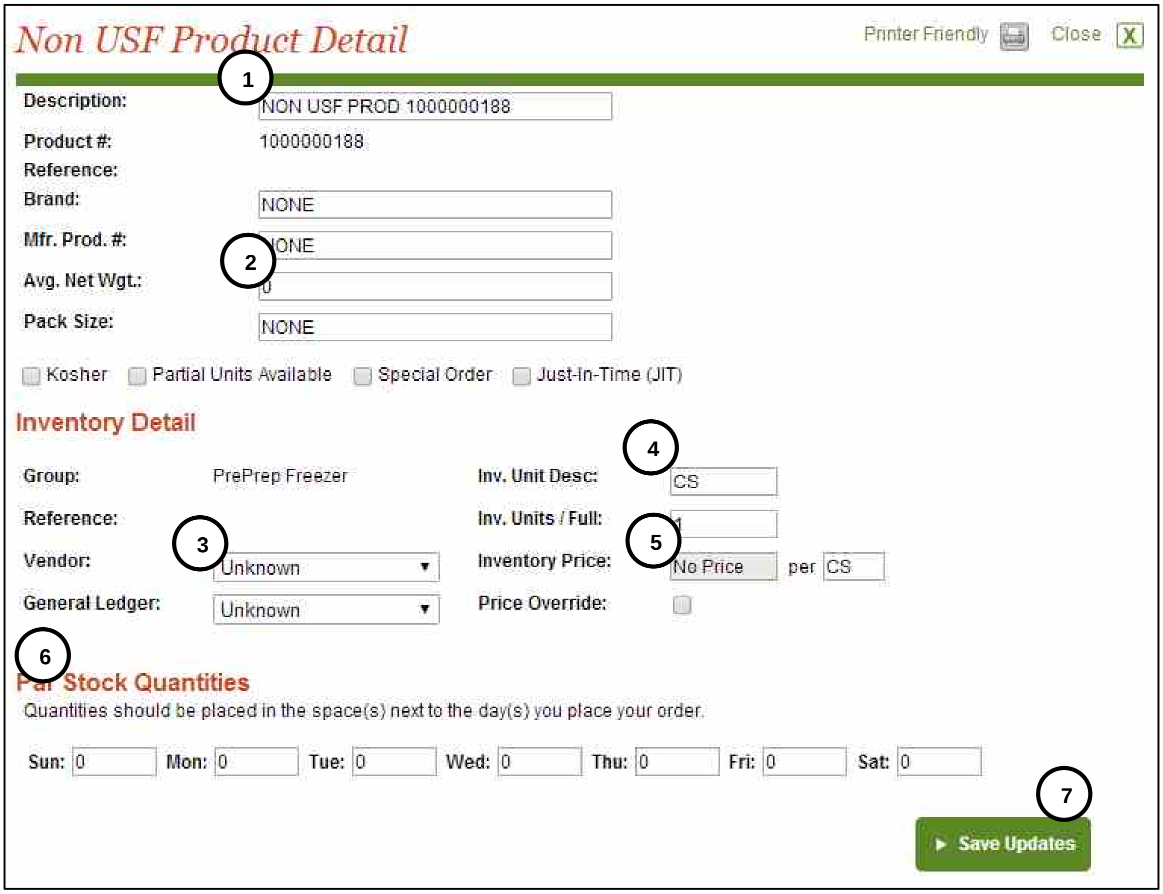

A dialog box will appear allowing you to enter product information.

1. Use the **Description, Brand** and **Mgr Prod #** fields to enter relevant product information.
2. Enter the Net Weight in POUNDS in the **Avg. Net Weight** field.
3. If you have created **Vendor** or **General Ledger** codes, assign them here.
4. **Inventory Unit** (Each, Gallon, Tray, etc) can be added here. This can be use to count inventory by the individual unit.
5. By clicking the **Price Override** check box, you are able to enter the correct **Inventory Price** for this Non US Foods Product.
6. **Par Stock Quantities** can be entered here, to generate an order value based on desired par level and inventory value.
7. Click **Save Updates** to save this information and return to the list you are managing.
8. To add more Non US Foods Product, repeat this process.

