

Managing Daily Pick & Ship Compliance

(Central)

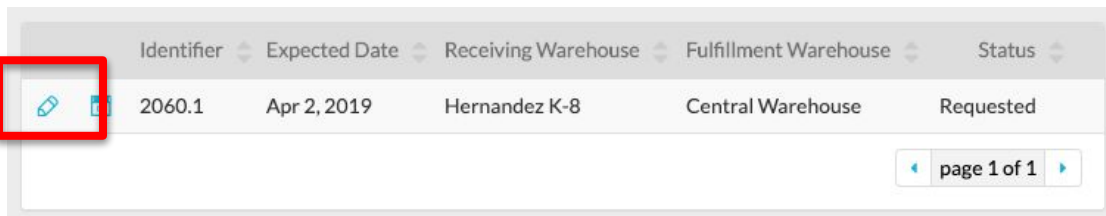
Managing daily pick & ship sheet compliance

The goal of this task is to ensure that all schools' orders are accurate so the warehouse can execute. There are several tasks to support this goal, outlined below.

Order guide & pick list schedule:

Day 1: Order guides due	Day 2: Follow up on any missing or incomplete order guides	Day 3: Warehouse picks food	Day 4: Warehouse ships food	Day 5: Schools cook & eat food
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- 1) Review & approve order guides that are due on your day (Day 1)
 - a) In Titan, go to Items > Warehouse Transfers > Advanced
 - b) Filter to expected date for Day 4 (delivery date)
 - c) Click pencil to edit



- d) Review items and qty's:
 - i) Do the products make sense based on the Day 5 menu?
 - ii) Do the product qty's make sense? (i.e., does a small school need 3 bottles of olive oil?)
 - iii) Are the product units correct? (i.e., 5 cases vs 5 bags)
 - e) If the order guide looks basically fine, make any adjustments that are intuitive and click Approve Transfer.
 - f) If the order guide does not look right (missing many key items, etc.) write to the manager (cc: field coordinator) and ask for clarification.
 - i) Tip: reference the order guide ID number as a best practice.
- 2) For schools that are missing an order guide for your day
 - a) Check under Purchasing > Ordering Guide to see if they started an order but didn't submit
 - i) Purchasing > Ordering Guide > Advanced > filter to expected date for Day 4
 - b) If you see an open order for this date, check it by clicking the pencil
 - i) If the order is blank (or if there are many blank orders), the manager has probably not planned their production record for the Day 5 meal date. As a result, the order guide has no data to pull from and is coming up blank.
 - (1) Solution: email manager (cc: field coordinator), provide instructions, and ask if they need help.
 - ii) If the order is complete, but not submitted, email manager (cc: field coordinator) and ask them to review and submit the open order.
 - c) If you can't find any order guide, email the manager (cc: field coordinator) and ask them to please submit ASAP

Questions? Email your field coordinator and CC: info@mywaycafe.org

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Has the manager submitted an order guide?

YES

NO

is the order guide correct for the meals?

Follow up with manager + cc: field coordinator

YES

MOSTLY

NO

Approve the order guide

Make adjustments to order qty & units

Write to manager + cc: field coordinator and ask for clarification / revision