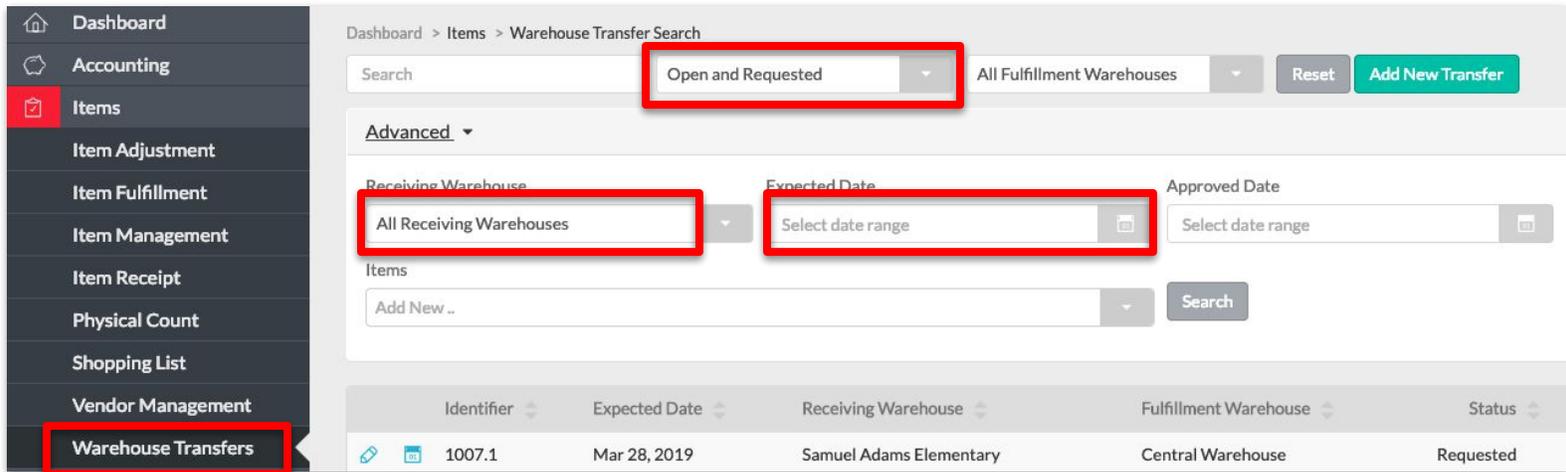


Bringing Orders through Fulfillment

(Warehouse/Inventory Manager)

1. When a manager places an order by creating an Order Guide, it becomes a 'Requested' 'Warehouse Transfer'
2. All of the warehouse transfers can be seen in the 'Items Module' on the left sidebar:
 - a. Optional filters:
 - i. Status: Open & Requested, Approved, Shipping, etc.
 - ii. Receiving warehouse (destination school)
 - iii. Expected date (delivery date)



3. Warehouse Transfers need to 'Approved' before they will show up on a pick list.
4. To view orders that need approval, filter status to Open & Requested (default) and select the Expected Date.
 - a. Click pencil to edit order
 - b. Make adjustments to quantities, units, and add/delete products being shipped

Identifier	Item	Quantity	Unit Of Measure	Quantity Available
Z-FRUIT9-0	fruit fruit (135.00 eaches per case)	6	case	-24 cases
C-CREAL9-1	cheerios regular cheerios, 96 ct (96.00 eaches per case)	2	case	100 cases
X-BFCRU9-0	beef crumbles beef crumbles (6.00 bags per case)	8	bag	-13 cases & -2.00 bags
Y-FZCNK9-0	frozen corn kernels frozen corn kernels, 30 lbs (30.00 pounds per case)	2	case	-22 cases
Z-BREAD9-0	whole wheat sliced bread bread (loaf), 18 slices (18.00 eaches per loaf)	24	loaf	-828 loaves

5. When order is ready, scroll down and click Approve Transfer. This will move the order to Item Fulfillment where it can be marked as Fulfilled once it is shipped.



Order Guide submissions are due at 2pm 3 days in advance of the 'Expected Date' and 4 days in advance of the menu day. This gives plenty of time for follow up or adjustments before picking in the warehouse.

Example: Order guides due **Monday**, reviewed Monday afternoon and Tuesday, picked **Wednesday**, delivered **Thursday**, and served **Friday**.

The two major things to watch out for are:

- Schools missing Warehouse Transfers
- Bad input on a Warehouse Transfer

School missing Warehouse Transfer:

1. To determine which schools have submitted their order guides, we created a [compliance tracker](#). Every time a warehouse transfer is approved for a specific expected date, the compliance tracker is marked off for that expected date.
2. If a school is missing a Warehouse Transfer for that specific date, the manager needs to be reached out to. As a last resort, sometimes the Order Guide needs to be filled out for a manager.

Bad input on a Warehouse Transfer:

1. All of the Warehouse Transfers need to be reviewed for bad inputs before they are approved. Typically bad inputs involve a unit of measurement being wrong (e.g. 2 cases of bell peppers being requested instead of 2 eaches).
2. When reviewing the Warehouse Transfer, adjustments are made centrally before approval.