

Creating an order guide for daily food delivery

Creating an Order Guide for daily delivery

When?

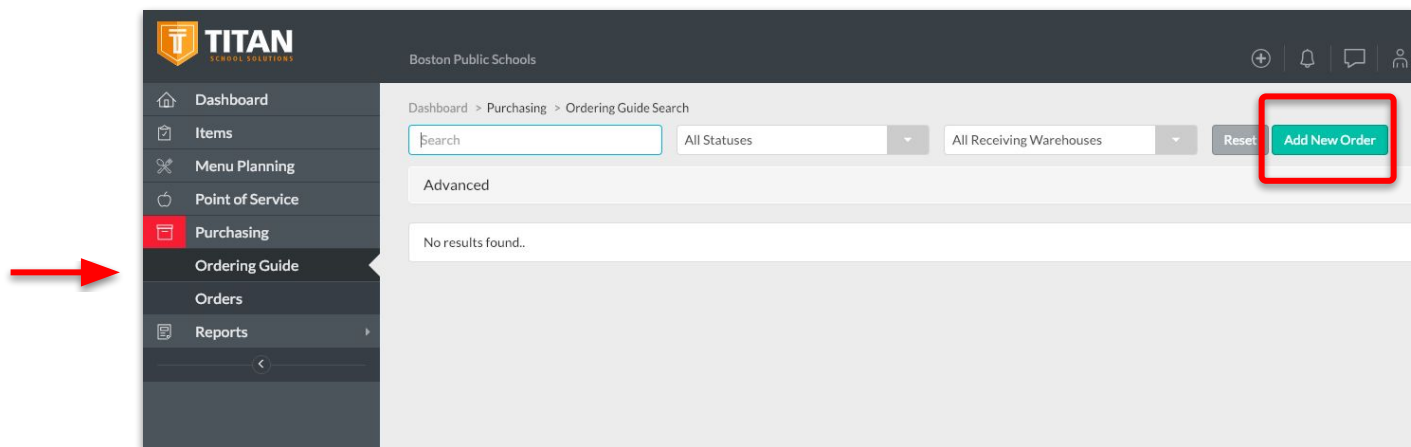
- Order Guides for daily delivery are placed **two days before the delivery date** (three days before the meal date).
- For example, on a Tuesday you would be submitting an Ordering Guide for Thursday's delivery, Friday's meal.

More details:

- When you start a new order guide, the items and quantities may already be filled in. These are estimates based on your Planned Production Records for that meal date and inventory.
- It's OK if the estimates aren't correct -- make updates as you go.
- Tip: keep the menu nearby so you don't miss any items.

Creating an Order Guide for daily food delivery

1. Log in to Titan: <https://portal.titank12.com/>
2. Navigate to Purchasing > Ordering Guide (not Orders)
3. Click *Add New Order*



4. Fill out the follow items:
 - a. *Expected Date* = delivery date. This is one day before the meal date.
 - b. Check off *Select All Production Records*.

- Include Safety Stock
- Select All Production Records
- Select All Back Orders

5. *Orders Through* = meal date.
6. When you're done, click Save to begin your Order Guide (this is your delivery preview).

A screenshot of the 'Add New Order' form in the Titan portal. The form is titled 'Add New Order' and has a close button (X) in the top right corner. It contains several fields: 'Warehouse' (O'Donnell Elementary), 'Delivery Address' (Main), 'Expected Date' (02/07/2019), 'Item Tags' (Add New ..), 'Vendors' (Add New ..), 'Shopping List' (empty), and 'Orders Through' (02/08/2019). There are three checkboxes: 'Include Safety Stock' (unchecked), 'Select All Production Records' (checked), and 'Select All Back Orders' (unchecked). At the bottom right, there are 'Cancel' and 'Save' buttons. A red arrow points to the 'Save' button.

7. From here, you can edit the ingredients for this order. If you need to change the unit, use the dropdown under Unit Of Measure.

The screenshot shows an order management interface. At the top, there are fields for 'Expected Date' (2/1/2019), 'Identifier' (20), 'Warehouse' (Bradley Elementary), 'Delivery Address' (Main), and 'Reference Number'. Below this is a table of ingredients. The table has columns for Identifier, Item, Quantity, Unit Of Measure, Warehouse / Vendor, and Quantity Available. A red box highlights the 'Quantity' and 'Unit Of Measure' columns for the first five items: whole wheat penne pasta (3 bags), olive oil (3 bottles), beef crumbles (3 bags), marinara sauce (9 bags), and broccoli florets (4 cans).

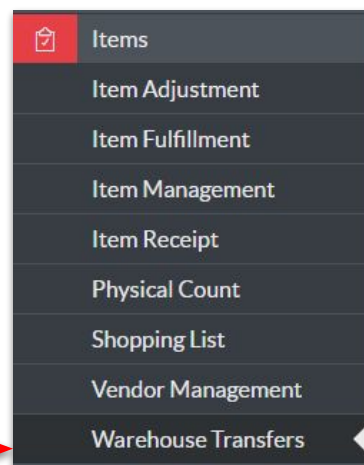
Identifier	Item	Quantity	Unit Of Measure	Warehouse / Vendor	Quantity Available
Z-PENPA9-0	whole wheat penne pasta penne pasta (wg), 2x10lbs (2.00 bags per case)	3	bag	Central Warehouse	None in Stock
Z-OLVOL9-0	olive oil olive oil, 4x3l (4.00 bottles per case)	3	bottle	Central Warehouse	None in Stock
X-BFCRU9-0	beef crumbles beef crumbles (6.00 bags per case)	3	bag	Central Warehouse	None in Stock
Z-MARSC9-0	marinara sauce marinara sauce, 6 x #10 bag (6.00 bags per case)	9	bag	Central Warehouse	None in Stock
Z-BROCF9-0	broccoli florets Broccoli, raw (6.00 cans per case)	4	can	Central Warehouse	None in Stock

7. When you've made all your adjustments, scroll to the bottom and click Request Orders. When you navigate back to Purchasing > Order Guide, you will see your order with the status Completed.

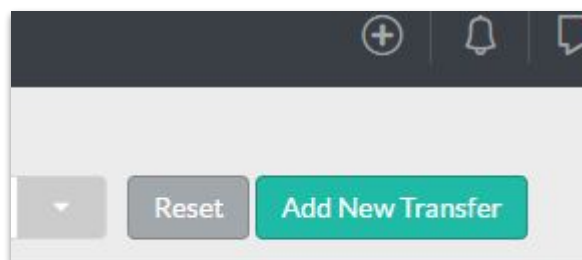
The screenshot shows a 'Notes' dialog box with a text area for notes. Below the text area are four buttons: 'Delete' (orange), 'Close' (grey), 'Save' (teal), and 'Request Orders' (teal). A red arrow points to the 'Request Orders' button.

Submitted your Ordering Guide but forgot to add an item?

1. Go to Items > Warehouse Transfers.



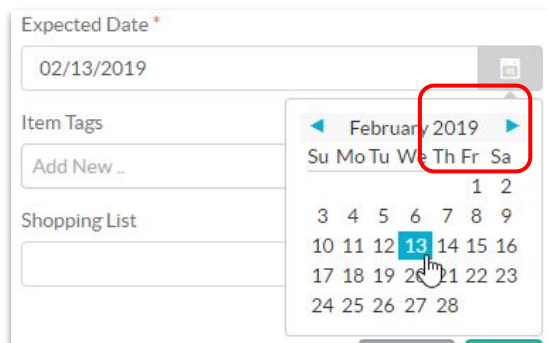
2. Click the blue “Add New Transfer” button in the top right.



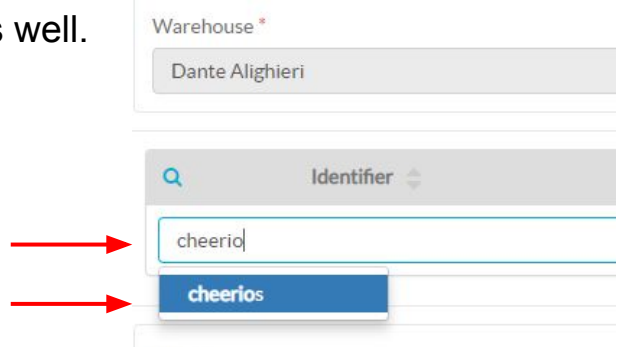
3. Receiving Warehouse, Delivery Address, and Fulfillment Warehouse should all already be filled out. If not, select the correct entries and the Fulfillment Warehouse is “Central Warehouse.”

A screenshot of the 'Add New Warehouse Transfer' form. It contains several fields: 'Receiving Warehouse' (Dante Alighieri), 'Delivery Address' (Main), 'Fulfillment Warehouse' (Central Warehouse), 'Expected Date' (02/13/2019), 'Item Tags' (Add New...), and 'Shopping List'. At the bottom right, there are 'Cancel' and 'Save' buttons.

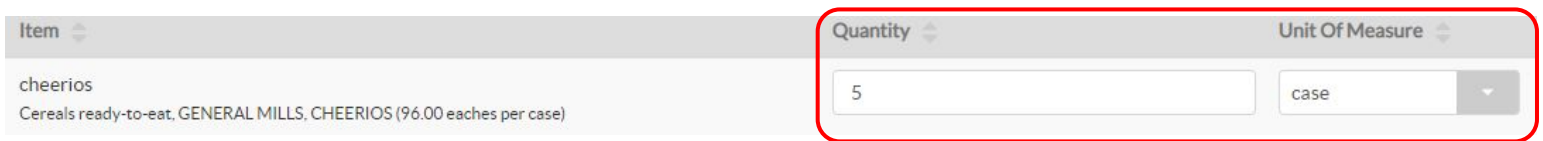
4. Change the expected date to the delivery date of the order that you wish to add the item to by clicking on the Calendar icon and clicking the desired date.



5. Type the item that you need into the search and click the correct entry result. You can repeat this step to add any number of items as well.



6. Enter the desired amount(s) into the textbox that appears. Also, make sure the Unit Of Measure is correct.



7. Click the blue “Request Transfer” button on the bottom right of the page (you may have to scroll down)

