

# **HOW TO PLACE AN ORDER** A STEP BY STEP GUIDE TO GET YOU ORDERING TODAY



# PLACING AN ORDER: GET STARTED CHECKLIST



### WELCOME TO AVERO FOOD COST MANAGEMENT!

We've created this checklist to help you get up and running with placing your first order. Just follow the steps outlined below to get a head start at managing your food costs.

### **STEP 1: SELECT YOUR PRODUCTS**

Let us know which products you'd like to order

### STEP 2: ADD TO YOUR CART

Add the items you'd like to your cart

### **STEP 3: VIEW PURCHASE ORDER**

Check your open P.O. to verify products and quantities are correct

## STEP 4: PLACE YOUR ORDER

Submit your order to your vendor

# STEP 5: SET ORDER STATUS AND RECEIVE YOUR ORDER

 $\hfill\square$  Track your order status in Avero, and ensure your inventory is up to date

For questions or issues during the order process, please reach out to support@averoinc.com or (888) 770-0426 between 9 – 6PM Central time.



# STEPS 1 & 2: Select Products & Add to cart

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### LET'S GET STARTED!

If you're reading this guide, you're ready to place your first order! Follow the instructions we've outlined in this quick guide to ensure your success with Avero Food Cost Management.

### STEP 1: SELECT PRODUCTS YOU'D LIKE TO PURCHASE

Under the purchasing tab, click into the Place Order page. This page will show all of the available products to order. Use the report generator to filter products by vendor, storage area, and product class. You can also filter by suggested purchase to only see items with a suggested purchase quantity greater than 0.

Note: Your products will only show a suggested purchase quantity if the item has been included in 2 P.O.s or 2 inventory counts, or 1 each of P.O. and inventory count.

### STEP 2: ADD THOSE PRODUCTS TO YOUR CART

Select your products by clicking the check box to the left of each product. You can select individual products, or all the products in the report at once by checking the top left check box in the header. Adjust the purchase quantity for the products you would like to buy using the +/- buttons, or by typing directly in the field. After selecting your products and quantities, click "Add to Cart" on the top left of the report. This will create P.O.'s by vendor with your selected products.

Note: Select items you want to order together frequently and select "Add to List" to create a new shopping list for these products.

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# STEP 3: REVIEW YOUR PURCHASE ORDER

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#### CHECK OUT YOUR PURCHASE ORDER

To view your open P.O.'s, click on the green shopping cart tab in the top right of the navigation pane. Click the P.O. number to open it.

Note: you can continue to add items to an active/open cart by clicking "Add Product" in the P.O. to search, or by closing the P.O. and using the report to select and add more products to your cart.

Once you have added all of your products, open the P.O. and verify that all products and quantities are correct. You can edit the item quantity, unit, and price from within the P.O. using the pencil tool, or delete any products from the P.O. using the trash icon. Click the check mark to the right to save any edits.

Note: Due to Avero's deep price integration with US Foods, you cannot edit pricing on US Foods products. Also, be sure to check over all products and quantities. You are not able to edit the P.O. in Avero once the order is submitted to the vendor.

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# **STEP 4: PLACE YOUR ORDER**



Once you're ready to place the order, open the P.O. and click the "Send to [Vendor]" button in the bottom right corner of the P.O. window. Before submitting the P.O., you can also write a brief note for the vendor.

Note: If your vendor have minimum order amounts, you'll see a warning if your order is below the amount, but won't prevent you from ordering.

Note: Once the P.O. is submitted, only status changes can be made to the P.O. US Foods order edits can be made in their ordering platform until cutoff time.

The process is slightly different for US Foods orders and Non-US Foods orders.

#### **US FOODS ORDERS**

After you click "Send to US Foods," a pop-up will bring you to the US Foods ordering page for you to confirm your order. If necessary, you'll be able to clear any product exceptions and update any delivery date exceptions. You can also go back to this page from the button in the lower right-hand corner of the P.O. You'll see a confirmation screen upon successful order submission.

Warning: Your browser's pop-up blockers must be disabled for this page to allow pop-ups. The US Foods pop-up must show to confirm your order.

### NON-US FOODS ORDERS

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After you click "Send to [Vendor]," the P.O. will be sent to the email address provided for that vendor as an excel attachment. The email address associated with your username will be cc'd on this order email.

Warning: If you've not entered a valid vendor email address, or if there's no email address associated with your username, the order won't be sent.



# STEP 5: ORDER STATUS AND RECEIVING ORDERS



Keeping track of the Order Status in Avero is important for tracking orders and inventory.

#### **US FOODS ORDERS**

Avero receives status updates on US Foods Orders every 2 hours. Once your order is delivered, Avero gets the End-of-Day Proof of Delivery. Your products will then be automatically received into the system.

Note: If you are going to take inventory on the day that items are delivered, you must manually receive any US Foods orders that are still the 'Delivered' status before you begin counting. This ensures that these products are not auto-received after your count, which would result in the products being double-counted.

#### NON-US FOODS ORDERS

After your order is placed, you will manually change the status of the P.O. in Avero. All non-US Foods P.O.s must be also manually received in Avero. The most important step here is confirming the item quantities and prices of products before you receive them into Avero. Edits to product quantities and prices must be made in the 'Delivered' status, before you receive the order into Avero.

See the next page for full descriptions of each P.O. status.





# STEP 5: ORDER STATUS AND RECEIVING ORDERS



The following are the Order Status options:

**IN CART** Items have been added to the cart, but the order has not been submitted.

**ORDERED** You've clicked "Send to [Vendor]" to submit your order. Once the P.O. is sent to the vendor, the order can't be edited until you begin the receiving process.

**CONFIRMED** You have received confirmation of your order from your vendor.

**DELIVERED** In the Delivered status, you are able to edit product quantities and prices on the P.O. to reflect what was delivered by the vendor. Here, you can adjust product quantities and change prices to match the vendor invoice. You can also use the trash icon to delete a product from the P.O. that was not delivered. Use the pencil to make edits, and the check mark to save.

After changing the status to 'Delivered,' close and reopen the P.O. Check boxes will appear to the right of each item. After making edits, check off each item to receive it into inventory. These changes will be reflected in your inventory.

Warning: This is important to ensure all products are properly adjusted to what was received so that they're added to inventory with the correct quantity and cost.

**RECEIVED** Select this status to receive all items on the P.O. as ordered. This will receive all items on the P.O. into your inventory without making any changes.

Warning: Once you select this status, you cannot edit the P.O.

**INVOICED** Turn your P.O. into an invoice. From here you can add credits, fees, invoice number, and invoice date. This will help you to keep track of your invoices in Avero.

**CANCELLED** If you cancel an order, mark it as cancelled on the P.O.

Warning: You're able to skip order status steps in Avero, but you aren't able to move backwards. Don't skip ahead to Received unless you want to receive all products into inventory from the P.O.! Don't skip ahead to Invoiced without first receiving all products, because products won't be received into inventory if you skip this step.

Note: After updating any P.O. status, close/reopen the P.O. to see the new status.







### ABOUT AVERO

Created by restaurant operators for restaurant operators, Avero is the trusted technology partner for the hospitality industry. We empower 40,000 restaurant professionals with the answers they need to transform their businesses and their lives, getting them out of the back office and in the kitchen with their staff, on the floor with their guests, and home with their families. Learn more at <u>www.averoinc.com</u>.

