

# Workpulse Purchasing

## Managing Template

With Purchasing open in your browser click on Admin to expand the field and select Templates. This will then load the currently active templates.

Admin > Templates

Vendor: All

Drag a column header here to group by that column

Vendor	Frequency	Template	Deliver
[Redacted]	Daily	CML AM	AM

Click on the template you wish to make changes to and the next screen will load. Here you may delete items from your template.

Admin > Template > Items, AM Order

PC#: [Redacted] BU Name: [Redacted] Frequency: Daily

Expand All Categories

Sequence	Item	Action
0	F20163-Dbf Choc Glazed	[Trash]
0	F20077-Chocolate Frosted	[Trash]
0	F20078-Vanilla Frosted	[Trash]
0	F20079-Strawberry Frosted	[Trash]
0	F20080-Marble Frosted	[Trash]
0	F20082-Sugar Raised	[Trash]
0	F20083-Cream	[Trash]

You can also click on add item in the top left to bring up available products. Here you can click the checkboxes next to the products you wish to add then click add.

The screenshot shows the Workpulse interface with the 'Add Item' dialog box open. The main interface displays a list of donut items under the 'Admin' section. The 'Add Item' dialog is open, showing a search bar and a list of 13 items with checkboxes. The first item, 'F20057-Cake Powd Munch', is selected. The dialog has 'Add' and 'Cancel' buttons at the bottom.

Sequence	Item
0	F20163-Dbf Choc Glazed
0	F20077-Chocolate Frosted
0	F20078-Vanilla Frosted
0	F20079-Strawberry Frosted
0	F20080-Marble Frosted
0	F20083-Glazed
0	F20084-Boston Kreme
0	F20087-Apple Crumb
0	F20089-Vanilla Kreme
0	F20092-Sugar Jelly
0	F20096-Kreme Filled
0	F20097-Chocolate Glazed
0	F20099-French Cruller
0	F20101-Sour Kreme Powdered

**Add Item**

Search Items...

1 items selected of 13 items

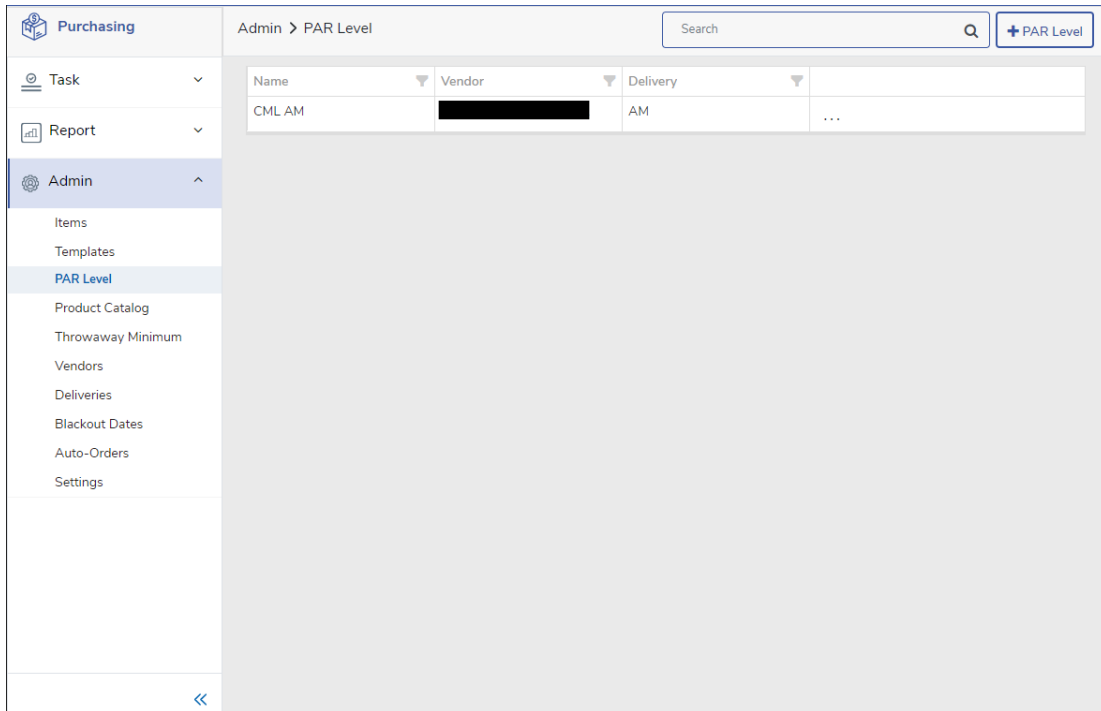
- F20057-Cake Powd Munch
- F20108-Cake Powdered
- U10011-Yeast Rings Plain
- F20082-Sugar Raised
- F20111-Bibryy Cake Munch
- F20180-Kreme Filled - Spring Sprinkles
- F20860-Plain Bavarian Filled
- F20987-Vanilla Kreme Filled
- U10012-Yeast Shells
- U10017-Yeast Munchkins Plain
- F21220-Dunkfetti Donut
- F21221-Dunkfetti Donut

**Add** **Cancel**

Any changes will be saved as they are completed.

## Managing PAR Level

With Purchasing open in your browser click on Admin to expand the field and select PAR Level. This will then load the currently active templates.



Click on the template you wish to make a change to and the next screen will load. Here you may make changes by day of the week, hover over the product name to view rounding and min/max rules, then click save to accept the changes.

The screenshot shows a detailed view of the PAR Level configuration for 'Donuts'. The table lists various donut items with their UOM and weekly quantities for each day of the week. A tooltip is visible over the 'Glazed' item, showing 'Min Qty: 12', 'Max Qty: -', 'Rounding Method: Up', and 'Rounding Qty: 12'. At the bottom, there are 'Save' and 'Cancel' buttons.

Item	UOM	Sun	Mon	Tue	Wed	Thu	Fri	Sat
Category: Donuts								
Dbl Choc Glazed	EA	24	24	24	24	24	24	24
Chocolate Frosted	EA	48	48	48	60	60	60	60
Vanilla Frosted	EA	24	24	24	24	24	24	24
Strawberry Frosted	EA	36	24	24	24	24	36	48
Marble Frosted	EA	12	12	12	12	12	12	24
Glazed	EA	84	72	72	72	72	72	84
Boston Kreme	EA	72	60	60	60	60	60	72
Apple Crumb	EA	24	18	18	18	18	24	24
Vanilla Kreme	EA	24	24	24	24	24	30	30
Sugar Jelly	EA	48	36	36	36	48	48	48
Kreme Filled	EA	36	36	36	36	36	36	36
Chocolate Glazed	EA	24	24	24	24	24	36	36
French Cruller	EA	36	24	24	24	36	36	36
Sour Kreme Powdered	EA	24	24	24	24	24	24	24
Old Fashioned	EA	30	30	30	30	30	30	30
Toasted Coconut	EA	18	12	12	12	12	18	18
Choc Frost Sprinkles	EA	36	48	48	48	48	48	48
Van Frost Sprinkles	EA	24	24	24	24	24	24	24
Straw Frosted Sprinkles	EA	36	24	24	24	24	36	48
Van Marble Frosted	EA	12	12	12	12	12	12	24
Red Frosted	EA	12	12	12	12	12	12	12

## Placing an Order

With Purchasing open in your browser click on Task to expand the field and select Purchase Order. The next screen will display the current day order and the next day order, if placed, for the locations that you have access to. The cards will also show the current status of the order

- 1) Open – Order was placed and is the process of being submitted to the CML
- 2) Submitted – Order has been successfully submitted to the CML
- 3) Processed – The CML has begun production and orders may no longer be edited.
- 4) Posted – Invoices have been generated and posted by the CML.

The screenshot displays the Purchasing interface with a search bar at the top: "Search by Delivery Date, Vendor, PO Number, Delivery, Status". On the left is a navigation menu with "Task" expanded to show "Purchase Order", "Order History", "Credit Request", and "Invoice". Below the menu are "Report" and "Admin" options. The main area shows two order cards, each with a "Vendor:" field, a "Location:" field, and an "Order cutoff time: 05:00pm".

Ship Date	Delivery	Invoice#
01/09/2021	AM	24
Amount	EQ Dz	Method
\$307.44	161.25	Forecast

Ship Date	Delivery	Invoice#
01/08/2021	AM	24
Amount	EQ Dz	Method
\$309.24	161.75	Forecast

Click on the icon in the bottom right of the screen to bring up the Place Order Menu. Here you can select the Vendor, Template, Order Method, and the Delivery Date then click Add Order when all fields are filled out. The order methods are

- 1) Regular – This will load the template with zero amounts
- 2) Forecast – This will bring up the template with forecasting enabled
- 3) Clone – This will bring up the template with amounts from another specified date filled out
- 4) ParLevel – This will bring up the template with amounts from your PAR Level filled out
- 5) SameDayLastWeek – This will bring up the template with amounts from the previous week
- 6) Special – This will create a special order which is not included in normal waste.

## Place Order ✕

📍 [REDACTED]

**Vendor\***  
[REDACTED] >

**Template\***  
 CML AM >

**Order Method\***  
 ParLevel ▾

**Delivery Date\***  
 01/09/2021

Add Order

Make any changes to the Ordered Qty column and when complete click on save in the bottom left.

Purchase Order > [REDACTED]

PO Summary ▾ Mass Modify ▾ 📄 Ne

Category	Item	Unit	Ordered Qty	Price(\$)	Ext Price(\$)	3 Jan	27 Dec
Donuts	Apple Crumb	EA	24	\$0.2600	\$6.24	18	24
Donuts	Blueberry Cake Glazed	EA	24	\$0.2600	\$6.24	24	24
Donuts	Boston Kreme	EA	72	\$0.2800	\$20.16	72	72
Donuts	Choc Frost Sprinkles	EA	36	\$0.2800	\$10.08	60	60
Donuts	Chocolate Frosted	EA	48	\$0.2600	\$12.48	48	60
Donuts	Chocolate Glazed	EA	24	\$0.2600	\$6.24	36	36
Donuts	Dbl Choc Glazed	EA	24	\$0.3000	\$7.20	24	24
Donuts	French Cruller	EA	36	\$0.2600	\$9.36	36	36
Donuts	Frosted Snowflake Donut	EA	12	\$0.3200	\$3.84	0	24
Donuts	Glazed	EA	84	\$0.2600	\$21.84	84	84
Donuts	Kreme Filled	EA	36	\$0.2600	\$9.36	30	36
Donuts	Marble Frosted	EA	12	\$0.2600	\$3.12	12	12
Donuts	Old Fashioned <small style="color: red;">Rules Applied</small>	EA	36	\$0.2600	\$9.36	30	30
Donuts	Red Frosted	EA	12	\$0.3000	\$3.60	0	24
Donuts	Sour Kreme Powdered	EA	24	\$0.2600	\$6.24	24	24
Donuts	Straw Frosted Sprinkles	EA	36	\$0.2800	\$10.08	48	48

Save
Cancel

## Credit Requests

With Purchasing open in your browser click on Task to expand the field and select Order History. The next screen will display your orders in the date range specified in your filters, found in the top right, for the locations that you have access to.

Invoice #	Vendor	Delivery	Delivery ...	Order Date	Receive Date	Amount(\$)	Status	Action
23	[REDACTED]	AM	1/7/2021	01-06-2021 11:36 AM	1/7/2021	\$278.28	Posted	Credit Request
200694989	[REDACTED]		1/5/2021	01-03-2021 12:00 AM	1/5/2021	\$3,076.90	Posted	
20	[REDACTED]	AM	1/5/2021	01-04-2021 03:02 PM	1/5/2021	\$266.22	Posted	
18	[REDACTED]	AM	1/4/2021	12-31-2020 04:15 PM	1/4/2021	\$262.62	Posted	
19	[REDACTED]	AM	1/3/2021	12-31-2020 02:47 PM	1/3/2021	\$294.24	Posted	
16	[REDACTED]	AM	1/2/2021	12-31-2020 02:45 PM	1/2/2021	\$300.72	Posted	

Click on Credit Request next to the date you wish to place a credit for. This will load the order information for you and list out what was ordered and a editable column next to it where you will fill out what you actually received. You can also fill in comments in the top right. When finished click Add Credit Request in the bottom left.

Category	Item	Unit	Ordered Qty	Received	Credit Qty	Price(\$)	Ext Price(\$)
Donuts	Apple Crumb	EA	12	12	0	\$0.2600	\$0.00
Donuts	Blueberry Cake Glazed	EA	18	18	0	\$0.2600	\$0.00
Donuts	Boston Kreme	EA	60	60	0	\$0.2800	\$0.00
Donuts	Choc Frost Sprinkles	EA	48	48	0	\$0.2800	\$0.00
Donuts	Chocolate Frosted	EA	48	48	0	\$0.2600	\$0.00
Donuts	Chocolate Glazed	EA	36	36	0	\$0.2600	\$0.00
Donuts	Dbl Choc Glazed	EA	24	24	0	\$0.3000	\$0.00
Donuts	Dunkfetti Donut	EA	36	36	0	\$0.3000	\$0.00
Donuts	French Cruller	EA	30	30	0	\$0.2600	\$0.00
Donuts	Glazed	EA	72	72	0	\$0.2600	\$0.00
Donuts	Kreme Filled	EA	24	24	0	\$0.2600	\$0.00
Donuts	Marble Frosted	EA	12	12	0	\$0.2600	\$0.00
Donuts	Old Fashioned	EA	30	30	0	\$0.2600	\$0.00
Donuts	Sour Kreme Powdered	EA	24	24	0	\$0.2600	\$0.00
Donuts	Straw Frosted Sprinkles	EA	48	48	0	\$0.2800	\$0.00
Donuts	Strawberry Frosted	EA	36	36	0	\$0.2600	\$0.00
Donuts	Sugar Jelly	EA	48	48	0	\$0.2600	\$0.00
Donuts	Toasted Coconut	EA	12	12	0	\$0.2600	\$0.00
Donuts	Van Frost Sprinkles	EA	24	24	0	\$0.2800	\$0.00
Donuts	Van Marble Frosted	EA	12	12	0	\$0.2600	\$0.00
Donuts	Vanilla Frosted	EA	24	24	0	\$0.2600	\$0.00
Donuts	Vanilla Kreme	EA	18	18	0	\$0.2600	\$0.00
Fancies	Coffee Roll	EA	9	9	0	\$0.4000	\$0.00
Fancies	Fritter	EA	6	6	0	\$0.4000	\$0.00

Comments  
Enter comments...

Add Credit Request Cancel

To view any already placed Credit Requests and their status click on Credit Request under Task on the left side of the screen.

**Purchasing**

Q Search by Vendor, Invoice Number, Delivery, Status

Task ^

- Purchase Order
- Order History
- Credit Request**
- Invoice

Report v

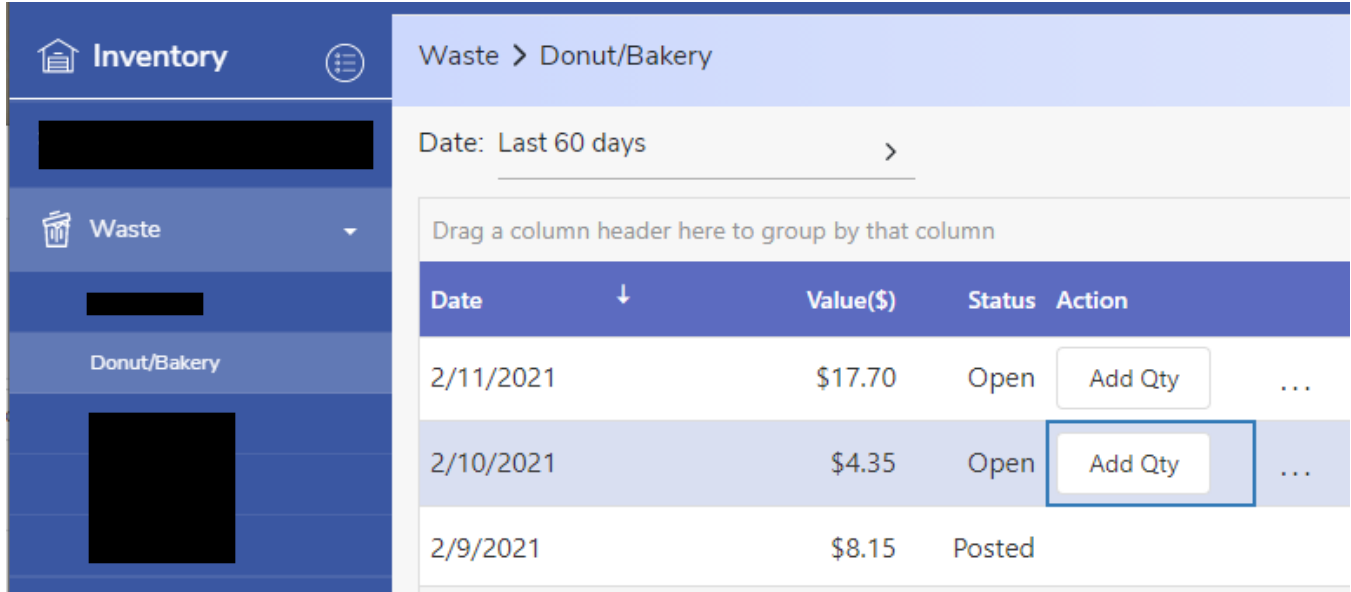
Admin v

Drag a column header here to group by that column

Invoice #	Vendor	Delivery	Delivery ...	Order Date	Receive Date	Amount(\$)	Status
CR20	[REDACTED]	AM	1/5/2021	01-05-2021 11:22 PM	1/5/2021	\$4.68	Posted
CR17	[REDACTED]	AM	1/3/2021	01-04-2021 10:24 AM	1/3/2021	\$9.36	Posted

## Entering Waste

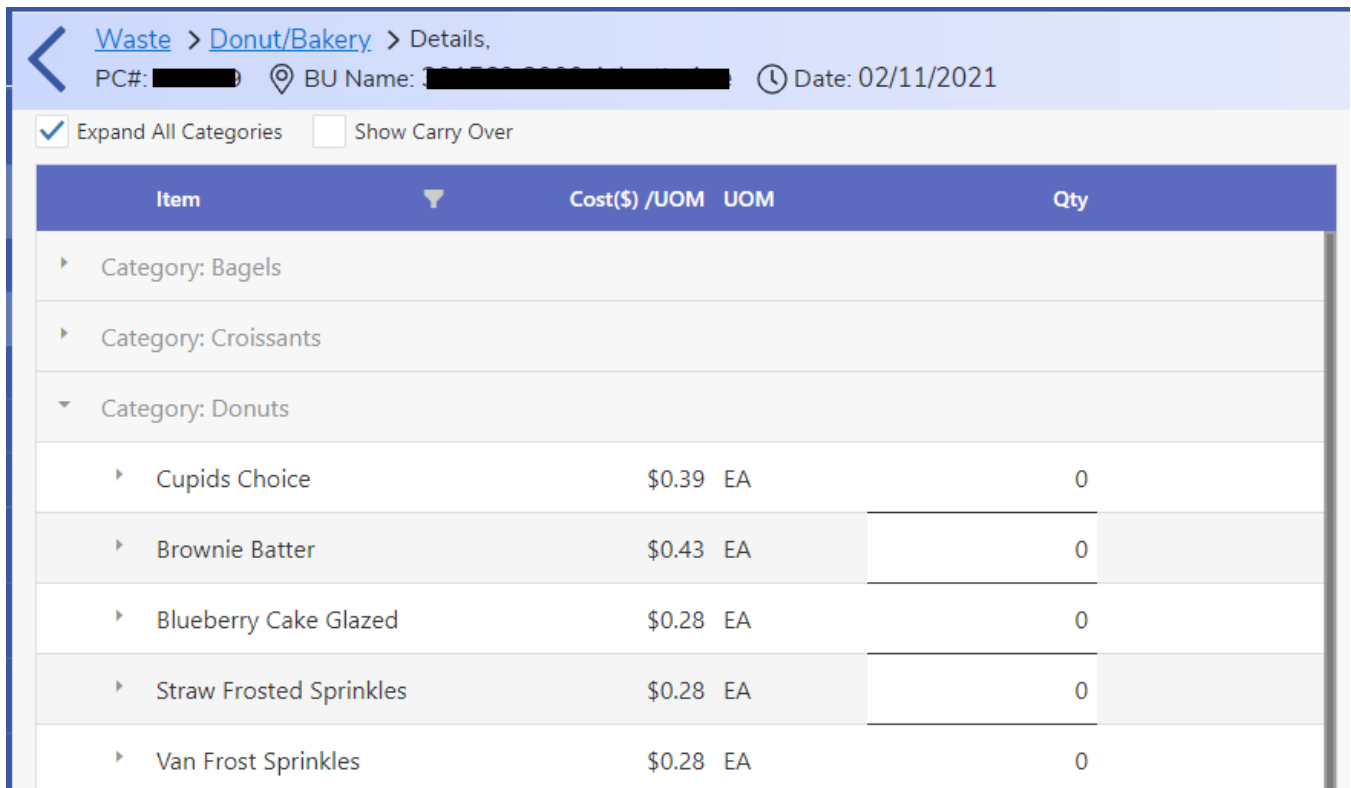
With Inventory open in your browser click on Waste to expand the field and select Donut/Bakery. The next screen will display your orders in the date range specified in your filters, found at top of the screen, for the location that you have selected.



The screenshot shows the 'Inventory' application interface. On the left is a navigation sidebar with 'Inventory' at the top, followed by a redacted area, 'Waste', another redacted area, 'Donut/Bakery', and a final redacted area. The main content area is titled 'Waste > Donut/Bakery'. Below the title, there is a date filter 'Date: Last 60 days' with a right arrow. A message says 'Drag a column header here to group by that column'. Below this is a table with the following data:

Date	Value(\$)	Status	Action
2/11/2021	\$17.70	Open	Add Qty ...
2/10/2021	\$4.35	Open	Add Qty ...
2/9/2021	\$8.15	Posted	

Click on Add Qty to load the waste entry, fill out the waste quantities, then click save at the bottom of the screen to create the waste record.



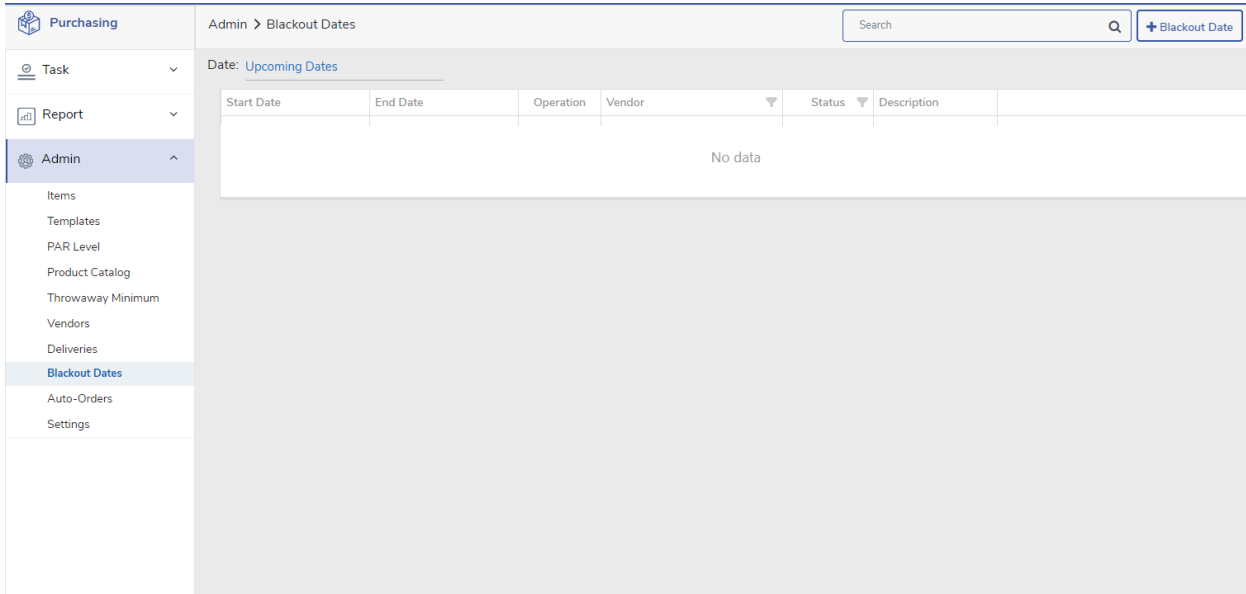
The screenshot shows the 'Waste > Donut/Bakery > Details' screen. At the top, there is a breadcrumb trail and filters: 'PC#: [redacted]', 'BU Name: [redacted]', and 'Date: 02/11/2021'. Below the filters are two checkboxes: 'Expand All Categories' (checked) and 'Show Carry Over' (unchecked). The main content is a table with the following data:

Item	Cost(\$)/UOM	UOM	Qty
Category: Bagels			
Category: Croissants			
Category: Donuts			
Cupids Choice	\$0.39 EA		0
Brownie Batter	\$0.43 EA		0
Blueberry Cake Glazed	\$0.28 EA		0
Straw Frosted Sprinkles	\$0.28 EA		0
Van Frost Sprinkles	\$0.28 EA		0



## Blackout Dates

With Purchasing open in your browser click on Admin to expand the field and select Blackout Dates. This will then load the currently active upcoming blackout dates by default.



To add a blackout date click on add Blackout Date in the top right. This will bring up the menu to enter a date range, the operations to be blacked out for that duration, and an area to enter a short message. When filled out click on Add to complete adding the blackout date.

