



CONNECT

**Mosaic BOH | The gravy train: Best
Practices to make your ordering
more efficient**

PRESENTED BY KRISTIN DUSETT



Agenda



Ordering Types

- Requisitions
- Vendor Orders
- Warehouse Orders



Online Ordering

- Definition
- Setup
- Export Process



Requisitions

Tips and Tools: Requisitions



Order by Menu Plan



Item Management

- Product / Item



Reports

- Shopping List
- Printing a Requisition

Order by Menu Plan

- Entering Production Quantities is the final step in enabling the automatic calculation of inventory orders

Home > Menus > Menu Search > Edit : 2 - Elementary Lunch

General | Recipes | Meal Totals | Reports

Menu #: 2 Serving Period: Lun
Menu Name: Elementary Lunch Age/Grade Group: K-5

Today < > 📅 March, 2023

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
26	27 Lunch X	28 Lunch X	01 Lunch X	02 Lunch X	03 B&B Burritc X	04
05	06 Lunch X	07 Lunch X	08 Lunch X	09 Lunch X	10 B&B Burritc X	11
12	13 Lunch X	14 Lunch X	15 Lunch X	16 Lunch X	17 B&B Burritc X	18
19	20 Lunch X	21 Lunch X	22 Lunch X	23 Lunch X	24 B&B Burritc X	25

Order by Menu Plan

- Users can view whether or not planned quantities have been entered, to ensure all needed items will be included in the order

Home > Ordering > Requisitions > Edit

Site: Arnold Menu Start Date: 2/27/2023
Menu Name: Elementary Lunch Menu End Date: 3/3/2023

Reset Search

<input checked="" type="checkbox"/>	Menu #	Menu Name	Menu Date	Serving Period	Grade / Age Group	Planned
<input checked="" type="checkbox"/>	2	Elementary Lunch	02/27/2023	Lunch	K-5 (age 5-10)	Yes
<input checked="" type="checkbox"/>	2	Elementary Lunch	02/28/2023	Lunch	K-5 (age 5-10)	Yes
<input checked="" type="checkbox"/>	2	Elementary Lunch	03/01/2023	Lunch	K-5 (age 5-10)	Yes
<input checked="" type="checkbox"/>	2	Elementary Lunch	03/02/2023	Lunch	K-5 (age 5-10)	Yes
<input checked="" type="checkbox"/>	2	Elementary Lunch	03/03/2023	Lunch	K-5 (age 5-10)	Yes

Cancel Select

Order by Menu Plan

- The requisition provides on hand and on order information for your convenience.
- Once approved, the program will automatically create your vendor, warehouse, or central kitchen orders for processing based on the primary source you have assigned.

Home > Ordering > Requisitions > Edit

Site: Requested Delivery Date:

Requisition #: Saved Date:

Status: Submitted Date:

Approved Date:

Products Requested: On Order: 0

Search within Product #, Description, Manufacturer, Brand

<input type="checkbox"/>	Product Item Number	Description	Brand	Source	Purchase Unit Description	Quantity On Hand	Quantity Requested	Purchase Unit Price	Total
<input type="checkbox"/>	101-001	Roll Dinner 52...		District Wareho...	Case/162/Roll	0 Case/162/Rol...	<input type="text" value="3"/>		
<input type="checkbox"/>	107-001	Bun Hamburge...		District Wareho...	Package	1 Package, 0 P...	<input type="text" value="5"/>		
<input type="checkbox"/>	10009-001	Carrots, Sliced ...		Sysco	Case 20#	7 Case 20#, 0 ...	<input type="text" value="3"/>	17.0000	51.0000
<input type="checkbox"/>	601-001	Dressing, Ranc...			Case/120/1.5 oz	1 Case/120/1.5...	<input type="text" value="2"/>	19.1700	38.3400
<input type="checkbox"/>	602-001	Mau... FF			Gallon	0 Gallon, 0 Gall	<input type="text" value="1"/>	8.7000	8.7000

Comment:

Requisition Total: 1215.0300

Item Management



- Manage products that come in different pack sizes by “adding an item” – same product number, different product setup

Home > Products > Maintenance > Edit : 10008-001, Broccoli Florets IQF

General Item Information Notes Attachments Availability Fulfillment

Item Number:	001	Status:	Available
Manufacturer:	<input type="text"/>	Commodity:	No
Manufacturer Product Number:	110473	Default Commodity Value:	<input type="text"/>
Brand:	Commodities	Default Purchase Unit Price:*(Value entered should include Default Comm. Value)	19.4700
Purchase Unit Description:*	Bag (25#)	Purchase Unit UPC Code:	<input type="text"/>
Purchase Unit Weight:*	30 Pounds	Stock Unit UPC Code:	<input type="text"/>
Stock Unit Description:*	EACH (1lb)	Stock Units per Purchase Unit:*	30
Exclude from Usage:	No	Warehouse Storage Locations:	<input type="text"/>

Item Management

- Manage which version of the product the requisition will import on the Purchase Info tab of the linked ingredient

Dusett Schools Kristin D

Item Reordered successfully

Home > Ingredients > Ingredient Search > Edit : 799936 - BROCCOLI,RAW

General | Measurement | Nutrients | Allergens | **Purchase Info** | Attachments

Product #	Manufacturer	Mfr. Product #	Brand	Purchase Unit	Cost	Commodity	Active
990418-002				25 Each (1lb) per Bag (25#)	19.4700	No	Yes
990418-001				2 5# Bag per Case (2/5# bag)	11.6800	No	Yes

When an ingredient is linked to a product, please be sure to verify the correct item is at the top of the list on the Purchase Info tab for proper cost analysis.

Reports – Shopping List

Production Planning Shopping List

Enter Date Range

	Starting Date	Ending Date	
Range 1:	3/18/2024	3/22/2024	
Range 2:	3/25/2024	3/29/2024	
Range 3:	4/1/2024	4/5/2024	
Range 4:			
Range 5:			

Menu Names:

Sites:

Site Group:

Include Ingredients From Sub-Recipes

Display Type:

[View](#)

- Show quantities needed for multiple weeks using the Shopping List

Reports - Shopping List

Production Planning - Shopping List

11-K-5 Lunch

2-GWE

		Vendor	Mfr / Vendor Prod #.	03/20/2023 thru 03/24/2023	03/27/2023 thru 03/31/2023	04/03/2023 thru 04/07/2023	Total Requirement 03/20/2023 thru 04/07/2023
Beef							
990362	BEEF FLAMEBROIL PATTY # 155-525 ADVANCE FOOD	Sysco Foods	00986	3 3/4	1 1/2	1 1/2	6 3/4 Case
1190	Beef, Ground 85% Lean	Gordon Food	23423	1/2	3/4		1 1/4 Case
990384	BEEF, CANNED, WITH NATURAL JUICES, SALT ADDED			3/4	3/4	3/4	1 3/4 Case (6/#10)
Beverages							
990366	WATER,MUNICIPAL			225 3/4	355 1/2	201	782 Gallon
Bread and cereal recipes							
616	Kaiser Bun WG	Sysco Foods	35538	6 1/2	2 3/4	2 1/4	11 1/4 Bag 96/2oz
18076	BREAD,WHOLE-WHEAT,COMMLY PREP.TSTD			2 3/4	5 3/4	5 3/4	13 3/4 LB

Condiments: catsup, mustard, relish

- Use the Shopping List in conjunction with the Requisition to adjust quantities ordered if needed

Reports – Print Requisition

- Once a requisition has been saved it can be printed or exported to an excel document for reference

Home > Ordering > Requisitions > Edit

Products Requested: George Washington Elementary
On Order: 0

Search within Product #, Description, Manufacturer, Brand

<input type="checkbox"/>	Product Item Number	Description	Brand	Source	Purchase Unit Description	Quantity On Hand	Quantity Requested	Purchase Unit Price	Total
<input type="checkbox"/>	799920-001	TOMATO PRO...	Sysco Foods	Sysco Foods	Case (6/#10)	4 Case (6/#10...	<input type="text" value="1"/>	35.0000	35.0000
<input type="checkbox"/>	901-999-002	Peaches, Cnd,...		Sysco Foods	Case (6/#10)	3 Case (6/#10...	<input type="text" value="3"/>	9.2300	27.6900
<input type="checkbox"/>	1000-001	Salt,Table		Gordon Food	Bag 25#	0 Bag 25#, 0 ...	<input type="text" value="1"/>	10.8600	10.8600
<input type="checkbox"/>	40021-001	Corn, Canned	Canned Corn	Sysco Foods	Case 6/16 oz	3 Case 6/16 o...	<input type="text" value="7"/>	10.0900	70.6300
<input type="checkbox"/>	990386-001	Chicken Patty ...			Case (50 3oz ...	0 Case (50 3o...	<input type="text" value="2"/>	0.0000	0.0000
<input type="checkbox"/>	990405-001	Chocolate Non...		Gordon Food	Case (24ct)	3 Case (24ct)...	<input type="text" value="11"/>	22.0500	242.5500

Comment:

Requisition Total: 1315.5800



Vendor Orders

Tips and Tools: Vendor Orders



Product Groups



Vendor Bulk Approval



Price List Management

- Duplicating Price Lists
- Scheduling Price Lists

Product Groups

Product Group Name:

Site:

Site Group:

Products Included

<input type="checkbox"/>	Product Item Num...	Manufacturer	Description	E
<input type="checkbox"/>	990370-001		Monster Energy Ultr...	
<input type="checkbox"/>	5002-001	Chobani	Yogurt, Chobani	G
<input type="checkbox"/>	990377-001	Bake Crafters	Breakfast Buns, Indi...	
<input type="checkbox"/>	990378-001	Bake Crafters	Cake, Chocolate Lav...	
<input type="checkbox"/>	990379-001		CANDIES,HERSHEY...	
<input type="checkbox"/>	990380-001		CANDIES,HONEY-C...	
<input type="checkbox"/>	990381-001	Bake Crafters	Mini Donuts, Whole ...	

- Create Product Groups as a time-saver to add frequently used products to an order all at once

Product Groups

Home > Ordering > Vendor Orders > Edit

Site: Delivery Date:

Vendor: Saved Date:

Order #: Submitted Date:

Requisition #: Approved Date:

Status:

Products Ordered

within **Product Group Name**

<input type="checkbox"/>	Product #	Description	Brand	Vendor Product #	Purchase Unit Description	Order Qty	Purchase Unit Price
<input checked="" type="checkbox"/>	5002-001	Yogurt, Chobani	Greek Yogurt	08374	Case 12/ 6 oz	<input type="text"/>	10.7500
<input type="checkbox"/>	990370-001	Monster Energy Ult...		011321	Case (24ct)	<input type="text"/>	36.7500
<input type="checkbox"/>	990370-001	Monster Energy Ult...		011321	Case (24ct)	<input type="text"/>	28.4200
<input type="checkbox"/>	990377-001	Breakfast Buns, In...		83943	Case (30 Each)	<input type="text"/>	26.7000
<input type="checkbox"/>	990378-001	Cake, Chocolate La...		58322	Case (12 Each)	<input type="text"/>	13.4500

Purchase Unit Price

- When adding products to an order, use a Product Group to add multiple products at once rather than individually

Let's take a look at how to create and use a product group

Product Group Name:

Site:

Site Group:

Products Included

<input type="checkbox"/>	Product Item Num...	Manufacturer	Description	E
<input type="checkbox"/>	990370-001		Monster Energy Ultr...	
<input type="checkbox"/>	5002-001	Chobani	Yogurt, Chobani	G
<input type="checkbox"/>	990377-001	Bake Crafters	Breakfast Buns, Indi...	
<input type="checkbox"/>	990378-001	Bake Crafters	Cake, Chocolate Lav...	
<input type="checkbox"/>	990379-001		CANDIES,HERSHEY...	
<input type="checkbox"/>	990380-001		CANDIES,HONEY-C...	
<input type="checkbox"/>	990381-001	Bake Crafters	Mini Donuts, Whole ...	

Vendor Order Bulk Approval

Home > Ordering > Vendor Orders Bulk Approval

Order #: Status: Submitted

Site: Delivery Start Date: 3/25/2024

Vendor: Delivery End Date: 3/26/2024

Entered By: Bulk Approval:

<input checked="" type="checkbox"/>	Order #	Status	Delivery Date	Site	Vendor	Entered By	Order Total	Bulk Approval	Approval Date	Approved By
<input checked="" type="checkbox"/>	720	Submitted	03/26/2024	Polk Elementary Sch...	Gordon Food	Manager Kristin	\$327.9200			
<input checked="" type="checkbox"/>	719	Submitted	03/25/2024	Polk Elementary Sch...	Sysco Foods	Manager Kristin	\$488.1900			
<input checked="" type="checkbox"/>	718	Submitted	03/26/2024	Susan B. Anthony El...	Gordon Food	Manager Kristin	\$595.8400			
<input checked="" type="checkbox"/>	717	Submitted	03/25/2024	Susan B. Anthony El...	Sysco Foods	Manager Kristin	\$356.9600			
<input checked="" type="checkbox"/>	716	Submitted	03/26/2024	George Washington ...	Gordon Food	Manager Kristin	\$734.5100			
<input checked="" type="checkbox"/>	715	Submitted	03/25/2024	George Washington ...	Sysco Foods	Manager Kristin	\$314.3300			

- Approve multiple vendor orders at once with the
- Bulk Approval process

Price List Management

8 Items Found Items per Page 20

List #	Description	Vendor	Start Date	End Date	Price List Status
23	US FOODS 24-25	US Foods	7/1/2024	6/30/2025	Scheduled
40	Moo Moo Dairy 2023	Kris test	8/1/2022	8/1/2023	Deactivated
48	Supplies 22-23	ABC Company	7/13/2022	7/1/2023	Expired
52	DAIRY 23-24	Hiland Dairy Company	7/1/2023	6/30/2024	In Use
54	Labatt 23-24	3245g34	7/14/2023	7/13/2024	Deactivated
62	OLD SYSYO 23-24	Sysco Foods	10/1/2023	6/30/2024	Deactivated
65	Labatt 23-24	trainingyu	8/1/2023	7/31/2024	In Use
66	NEW SYSYO 23-24	Sysco Foods	1/4/2024	6/30/2024	In Use

- Manage your Price Lists to keep track of what products come from which vendors, and how much they cost

Price List Management

Home > Products > Price Lists > Edit : Price List # 38

Description: Start Date:

Vendor: End Date:

Status:

Always update price on receiving records

Products Included

Search within Product #, Description, Brand, Vendor Product #

<input type="checkbox"/>	Product Item #	Description	Brand	Vendor Product #	Quantity per Purchase Unit	Commodity Value	Price per Purchase Unit
<input type="checkbox"/>	00187-001	Napkin 15.17 2ply	ABC	<input type="text" value="64322"/>	10 Pkg (300ct) per C...		<input type="text" value="10.7500"/>
<input type="checkbox"/>	00816-001	Fork Spoon Kit Plast	ABC	<input type="text" value="64320"/>	500 Each per Case (5...		<input type="text" value="18.5500"/>
<input type="checkbox"/>	00816-002	Fork Spoon Kit Plast	acadian	<input type="text" value="23423"/>	500 Each per Case (5...		<input type="text" value="12.2300"/>
<input type="checkbox"/>	10000-001	Beans, Green, Cut #...		<input type="text" value="200318"/>	6 #10 Can per Case ...		<input type="text" value="23.5400"/>
<input type="checkbox"/>	10001-001	Catsup, Cnd	US Foods	<input type="text" value="76543"/>	6 #10 Can per Case ...		<input type="text" value="21.0500"/>

Remove

Comment:

Update Default Price & Save

Copy

Deactivate

Cancel

Save

- Save time and stay on top of Price Lists using the copy function, and scheduling future Price Lists ahead of time

CONNECT

Price List Management

Home > Products > Price Lists > Edit

Description: Start Date: 

Vendor: End Date: 

Status: Duplicated Price List 

Always update price on receiving records

Products Included

within Product #, Description, Brand, Vendor Product #

<input type="checkbox"/>	Product Item #	Description	Brand	Vendor Product #	Quantity per Purchase Unit	Commodity Value	Price per Purchase Unit
<input type="checkbox"/>	00187-001	Napkin 15.17 2ply	ABC	<input type="text" value="64322"/>	10 Pkg (300ct) per C...		<input type="text" value="10.7500"/>
<input type="checkbox"/>	00816-001	Fork Spoon Kit Plast	ABC	<input type="text" value="64320"/>	500 Each per Case (5...		<input type="text" value="18.5500"/>
<input type="checkbox"/>	00816-002	Fork Spoon Kit Plast	acadian	<input type="text" value="23423"/>	500 Each per Case (5...		<input type="text" value="12.2300"/>
<input type="checkbox"/>	10000-001	Beans, Green, Cut #...		<input type="text" value="200318"/>	6 #10 Can per Case ...		<input type="text" value="23.5400"/>
<input type="checkbox"/>	10001-001	Catsup, Cnd	US Foods	<input type="text" value="76543"/>	6 #10 Can per Case ...		<input type="text" value="21.0500"/>

Comment:

- Save time and stay on top of Price Lists using the copy function, and scheduling future Price Lists ahead of time

Add a New Product to Price List

Home > Products > Maintenance > Edit : 1057837-001, Bread, Cinnamon Raisin

General | **Item Information** | Notes | Attachments | Availability | Fulfillment

Item Number: 001

Manufacturer: MRS. SMITH'S BAKERIES BREADED

Manufacturer Product Number:

Brand:

Purchase Unit Description:* Case (18/Loaf)

Purchase Unit Weight:* 343 Ounces

Stock Unit Description:* Loaf (20 slice)

Exclude from Usage: No

Price Lists

<input type="checkbox"/>	List #	Description	Vendor	Vendor Product #	Start Date
--------------------------	--------	-------------	--------	------------------	------------

[Remove from Price List](#) [Add to Price List](#)

- After creating a new product, quickly add it to a price list from within the product setup page

Add a New Product to Price List

Add Item to Price List

Price List # 66: NEW SYSYO 23-24

Product #	Description	Brand
1057837-001	Bread, Cinnamon Raisin	

Vendor Product #:* Price Per Purchase Unit:*

Commodity Value:

- After creating a new product, quickly add it to a price list from within the product setup page



Warehouse Orders

Tips and Tools: Warehouse



Bulk Approvals



**Consolidated Warehouse
Vendor Orders**



**Warehouse Item Availability
Report**

Warehouse Order Bulk Approval

Home > Ordering > Warehouse Orders Bulk Approval

Order #: Status: Submitted

Delivery Site: Delivery Start Date: 3/25/2024

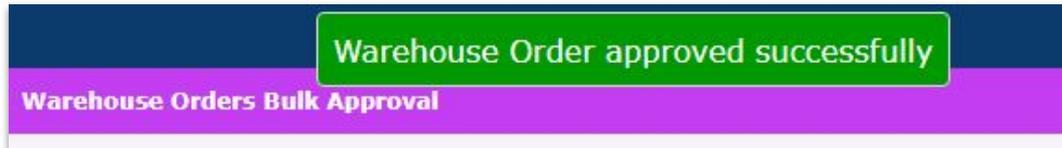
Source Site (Warehouse): Delivery End Date: 3/29/2024

Entered By: Bulk Approval:

<input checked="" type="checkbox"/>	Order #	Status	Delivery Date	Delivery Site	Source Site (Warehouse)	Entered By	Order Total	Bulk Approval
<input checked="" type="checkbox"/>	268	Submitted	03/27/2024	Lincoln Elementary School	WAREHOUSE	Manager Kristin	\$318.1644	
<input checked="" type="checkbox"/>	267	Submitted	03/28/2024	Harrison Elementary School	WAREHOUSE	Manager Kristin	\$380.8073	
<input checked="" type="checkbox"/>	266	Submitted	03/28/2024	Susan B. Anthony Elementary	WAREHOUSE	Manager Kristin	\$302.8463	
<input checked="" type="checkbox"/>	265	Submitted	03/27/2024	Polk Elementary School	WAREHOUSE	Manager Kristin	\$338.1426	
<input checked="" type="checkbox"/>	264	Submitted	03/27/2024	George Washington Elementary	WAREHOUSE	Manager Kristin	\$171.3000	

- Similar to Vendor Orders, we can also approve multiple Warehouse Orders with the Bulk Approval process

Warehouse Order Bulk Approval



- Similar to Vendor Orders, we can also approve multiple Warehouse Orders with the Bulk Approval process

Consolidated Warehouse Vendor Orders

Home > Ordering > Consolidated Warehouse Vendor Orders

Warehouse:

Site:

Site Group:

Entered By:

Approved By:

Status:

Approval Start Date:

Approval End Date:

Delivery Start Date:

Delivery End Date:

<input checked="" type="checkbox"/>	Order #	Status	Delivery Date	Site	Warehouse	Entered By	Approval Date	Approved By
<input checked="" type="checkbox"/>	155	Approved	11/28/2022	George Washington Ele...	WAREHOUSE	Manager Kristin	11/16/2022	Kristin D
<input checked="" type="checkbox"/>	156	Approved	12/02/2022	George Washington Ele...	WAREHOUSE	Kristin D	11/30/2022	Kristin D
<input checked="" type="checkbox"/>	157	Approved	12/01/2022	George Washington Ele...	WAREHOUSE	Manager Kristin	11/30/2022	Kristin D
<input checked="" type="checkbox"/>	158	Approved	03/31/2023	George Washington Ele...	WAREHOUSE	Kristin D	02/22/2023	Kristin D
<input checked="" type="checkbox"/>	159	Approved	03/30/2023	Frederick Douglass Elem...	WAREHOUSE	Kristin D	02/22/2023	Kristin D
<input checked="" type="checkbox"/>	160	Approved	03/31/2023	Susan B. Anthony Eleme...	WAREHOUSE	Kristin D	02/22/2023	Kristin D

- Create Vendor Orders to be delivered to your Warehouse to fulfill the items requested by sites

Consolidated Warehouse Vendor Orders

The screenshot shows a web application interface for managing vendor orders. The breadcrumb navigation at the top reads: Home > Ordering > Consolidated Warehouse Vendor Orders > Set Delivery Date(s). Below the navigation is a table with columns: Order #, Status, Delivery Date, Vendor, Warehouse, and Entered By. The table contains four rows of data, all with a status of 'Saved'. A large grey dialog box is overlaid on the table, containing a 'Warning' header with a yellow exclamation mark icon, the text 'Do you want to Approve these Vendor Orders?', and two buttons: 'Yes' (green) and 'No' (red). At the bottom of the interface, there is a date selection area with a calendar icon and a text input field containing '03/31/2023'. To the right of the date input are 'Cancel' and 'Save' buttons.

Order #	Status	Delivery Date	Vendor	Warehouse	Entered By
478	Saved	03/31/2023	Lehmann Food Service	WAREHOUSE	Kristin D.
479	Saved				
480	Saved				
481	Saved				

- Set delivery dates and approve the the new vendor orders without having to access orders individually

Warehouse Item Availability Report

Home > Reports > Inventory > Warehouse/Central Kitchen Item Availability Report

Warehouse/Central Kitchen Item Availability Report

Site Type:	Warehouse	Through Date:	3/31/2023
Site:		Needs Attention:	
Product # or Description:		Shortages:	
Product Category:		Active:	Yes
Usage Category:		Group By:	
Storage Category:		Order By:	Description
Include Submitted Orders:	No	Display Type:	PDF
Only Show Items With Activity:	No		

[View](#)

- Use the Warehouse Item Availability Report to keep track of stock and potential shortages at the Warehouse

Warehouse Item Availability Report

Warehouse Item Availability		Dusett S					
Only Show Items With Activity: Yes		Through Date: 3/29/24					
Active: Yes		Order By: Description					
Freezer							
Item #	Description	Purchase Unit	Qty On Hand	Qty Reserved	Qty Available	Qty Shortage	Qty On Order
990377-001	Breakfast Buns, Individually Wrapped	Case (30 Each)	9		9		1
54332-001	Hamburger Bun	Bag (12ct)	9.33	12		-2.67	12
112233-001	Hoagie 4.5" Roll	Case 96 Count	9	1	8		1
WAREHOUSE							
Item #	Description	Purchase Unit	Qty On Hand	Qty Reserved	Qty Available	Qty Shortage	Qty On Order
12225-001	Apples, Cnd, Water Packed	Case (6/#10)	99	5	94		
4000-001	Applesauce, Cnd	Case (6/#10)	33.33	16.5	16.83		
990421-001	BANANAS,RAW	Case (33.4#)	97	10	87		
990419-001	BEANS, CANNED, GARBANZO (CHICKPEAS), LOW-SODI	Case (6/#10)	99	3	96		
10000-001	Beans, Green, Cut #10 Can	Case (6/#10)	90	110.17		-20.17	
990362-002	BEEF FLAMEBROIL PATTY # 155-525 ADVANCE FOOD	Case	49	51		-2	
202-001	Beef Patties	Case (135ct)	100	52	48		

- Run the report to see stock reserved for transfers within a specific date range



Let's take a look at these Warehouse tools:

Home > Ordering > Consolidated Warehouse Vendor Orders

Warehouse: Status:

Site: Approval Start Date:

Site Group: Approval End Date:

Entered By: Delivery Start Date:

Approved By: Delivery End Date:

Warehouse Item Availability Dusett S

Site: WAREHOUSE Include Submitted Orders: Yes
 Through Date: 3/31/23 Active: Yes
 Order By: Description

Total includes Submitted orders

WAREHOUSE

Item #	Description	Purchase Unit	Qty On Hand	Qty Reserved	Qty Available	Qty Shortage	Qty On Order
12225-001	Apples, Cnd, Water Packed	Case (6#10)	1.5	5		-3.5	
9003-001	Apples, Raw w/Skin	Case (113ct)					
9003-004	Apples, Raw w/Skin	purchase	1.04	1	0.04		
9003-005	Apples, Raw w/Skin	Case (113ct)	2		2		
9003-006	Apples, Raw w/Skin	Case (113ct)					
9003-007	Apples, Raw w/Skin	Case (113ct)	2.02	1	1.02		
9003-002	Apples, Raw w/Skin	Bag (25#)					
9003-003	Apples, Raw w/Skin	Bag (25#)	2.29	1	1.29		
4000-001	Applesauce, Cnd	Case (6#10)	2.5	6		-3.5	
990361-001	APRICOTS,CND,LT SYRUP PK,W/SKN,SOL&LIQUIDS	Case 6#10					

<input checked="" type="checkbox"/>	Order #	Status	Delivery Date	Site	Warehouse	Entered By
<input checked="" type="checkbox"/>	155	Approved	11/28/2022	George Washington Ele...	WAREHOUSE	Manager Kristin
<input checked="" type="checkbox"/>	156	Approved	12/02/2022	George Washington Ele...	WAREHOUSE	Kristin D
<input checked="" type="checkbox"/>	157	Approved	12/01/2022	George Washington Ele...	WAREHOUSE	Manager Kristin
<input checked="" type="checkbox"/>	158	Approved	03/31/2023	George Washington Ele...	WAREHOUSE	Kristin D
<input checked="" type="checkbox"/>	159	Approved	03/30/2023	Frederick Douglass Elem...	WAREHOUSE	Kristin D
<input checked="" type="checkbox"/>	160	Approved	03/31/2023	Susan B. Anthony Eleme...	WAREHOUSE	Kristin D



Online Ordering

Tips and Tools: Online Ordering



Vendor Order Exports

- Definition
- Setup
- Export Process

Vendor Order Exports

- Vendor specific export templates are developed by Mosaic in collaboration with your vendor to provide a file format to use for online ordering
- Upload your orders online, or send them directly from Mosaic to the vendor depending on their capabilities

Labatt
FOOD SERVICE

Gordon[®]
FOOD SERVICE



CONNECT

Vendor Order Exports – Setup

Home > Setup > Vendors > Edit : SYS

General | Contacts | Delivery Sites | SFTP

Vendor Abbreviation:

Vendor Name:

Vendor Number:

Vendor Rating: ☆ ☆ ☆ ☆ ☆

Delivery Lead Time (business days):

Minimum Order Amount:

Order Export Template:

Vendor Instructions:

Shamrock

Springfield Grocers

Sysco (POE w/Vendor Site#)

Sysco (POE)

Sysco (POE) Split Case

Sysco Shop

Upper Lakes Foods

US Foods

- In the Vendor Setup section select the appropriate template, enter site delivery information, and set up SFTP when applicable

Vendor Order Exports – Setup

Home > Setup > Vendors > Edit : SYS

General Contacts **Delivery Sites** SFTP

Site Nu...	Site Name	Site Type	Customer Number
58	Central Kitchen	Central Kitchen	
6	Frederick Douglass Eleme...	Food Preparatio...	
2	George Washington Elem...	Food Preparatio...	03129385
7	Madison Elementary	Food Preparatio...	
1	Susan B. Anthony Elemen...	Food Preparatio...	
3	WAREHOUSE	Warehouse	

Site: George Washington Elementary

Site Number: 2

Customer Number: 03129385

Delivery Instructions: All deliveries to dock C

Delivery Schedule: Tuesday × Thursday ×

Deactivate Cancel Save

- In the Vendor Setup section select the appropriate template, enter site delivery information, and set up SFTP when applicable

Vendor Order Exports – Setup

Home > Setup > Vendors > Edit : SYS

General Contacts Delivery Sites SFTP

SFTP Maintenance

Active:* No

Username:*

Password:*

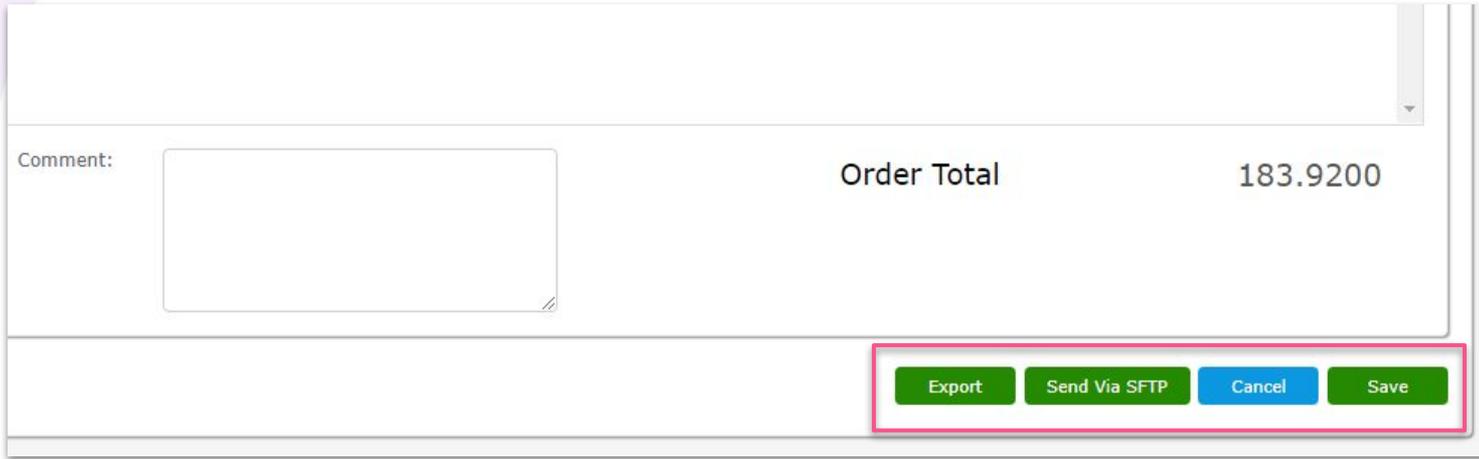
Server:*

Path:

Test Settings

- In the Vendor Setup section select the appropriate template, enter site delivery information, and set up SFTP when applicable

Vendor Order Exports – Export Process



Comment:

Order Total 183.9200

[Export](#) [Send Via SFTP](#) [Cancel](#) [Save](#)

- When a Vendor has an export template selected you will see the option to “export” on an order
- If you set up SFTP for a Vendor you will see the option to “Send Via SFTP” on an order

Let's take a look at a Vendor set up

Home > Setup > Vendors > Edit : SYS

General Contacts Delivery Sites SFTP

Vendor Abbreviation:

Vendor Name:

Vendor Number:

Vendor Rating: ☆ ☆ ☆ ☆ ☆

Delivery Lead Time (business days):

Minimum Order Amount:

Order Export Template:

Vendor Instructions:

Need Help?

Phone Support

1-800-724-9853, say “Mosaic
Back of House”

Email Support

MosaicMPSupport@e-hps.com

Additional Resources

help.heartlandschoolsolutions.com

Available in the Help Menu

HSS University Training Videos

User Guides

Knowledge Articles

Thank you

CONNECT