

Configure Vendor Delivery Schedules

Quick Start Guide

Document Details

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Overview

Vendor Delivery Schedules are used to remind managers when they need to place Vendor Orders, as well as guide Auto-Order dates and times. This guide will show you how to configure these schedules.



Download the latest version of this document here:

<https://links.crunchtime.com/NCQS-VendorDeliverySchedules>

... or scan the QR code to the left.

Related Documentation

- NCQS – Auto Submit Vendor Order: <https://links.crunchtime.com/NCQS-AutoSubmitVendorOrder>

Related User Group Permissions

Screen Name	Control Name	Description
NC-Administrative Options	Vendor Information	Enables <i>Vendor Information</i> on the Purchasing menu.
NC-Vendor Information	Edit	Make and save changes to contact information and comments in the <i>Vendor Information</i> screen.

Configure Vendor Delivery Schedules

Overview

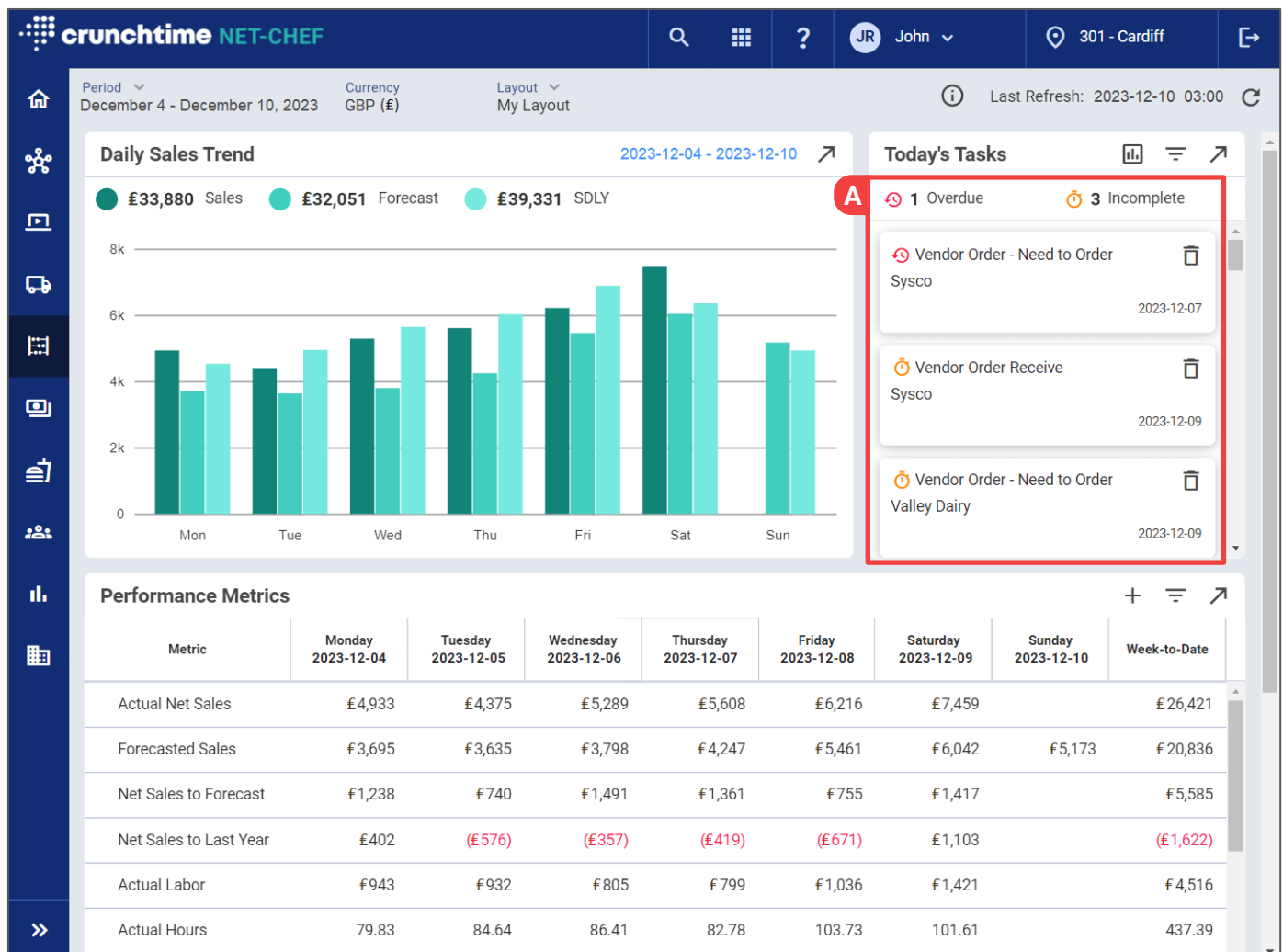
Vendor Order and Delivery Schedules are location-specific schedules configured in Net-Chef that will create Dashboard tasks to remind managers when to place Vendor Orders and indicate when they are overdue.



Note: Delivery Schedules are required for the Net-Chef Dashboard to display the Daily Task for Vendor Order - Need to Order.

Using the Screen

Net-Chef > Dashboard: Today's Tasks widget



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Overdue tasks are signified by a red clock icon 🕒, while Incomplete tasks are signified by an orange clock icon 🕒, as shown above.

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Configure Vendor Delivery Schedules

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Required Setup

To create a delivery schedule, the vendor must be listed on the Vendor Information page in Net-Chef. Vendors will be listed on this screen if at least one of the following is true:

- The vendor has an existing Location Detail record for this location in Enterprise Manager.
- The vendor has Vendor Information previously configured in Net-Chef for this location.
- The vendor has at least one bid that is currently active, has been active within the past 4 weeks (28 days), or will be active in the next 4 weeks (28 days) for the location's market (or related secondary market).



Setup Note: If the vendor has a Location Detail record for the current location in Enterprise Manager, that record must have the "Allow VO" flag enabled for the current location to receive the *Vendor Order - Need to Order Daily* task.



Tip: If none of the above conditions are met the vendor will no longer appear on the Vendor Information screen. If necessary, the "Allow VO" and "Allow PBI" flags can be disabled from the *Vendor Details* in Enterprise Manager to remove the vendor from the Vendor Information view while one or more of the above conditions are still met.

Setup Vendor Information

Net-Chef > Purchasing: Vendor Information

crunchtime NET-CHEF							
Vendor Information							
Vendor Code	Vendor Name	Account Number	Contact Name	Phone	Last Edit Date	Active	
01102	Ashline Foods	V-1102	Alea Alumera	971-04-963-7786	2023-10-01	✓	1 >
02011	Finch Foodservice	V-2011	Samantha Groves	212-410-7202	2023-10-01	✓	>
01001	Hallsmith Sysco	V-1001	Ernest Thornhill	972-502-7221	2023-10-01	✓	>
01101	Hunchuck Foods	V-1101	Melissa Grimm	44-029-4284-7768	2023-10-01	✓	>
01103	Kiza Foodservice	V-1103	Amanda Kiza	39-06-081-7735	2023-10-01	✓	>
01007	Odbbins Liquors	V-1007	John Watson	44-020-2711-2218	2023-10-01	✓	>

- 1 From the Vendor Information screen, select the > (Edit) icon to open the detail screen for the desired vendor.

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Configure Vendor Delivery Schedules

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Setup Vendor Information (continued)

Net-Chef > Purchasing: Vendor Information > {Edit}

crunchtime NET-CHEF

John

301 - Cardiff

Vendor Information > Finch Foodservice

Vendor Details

2

Order Day

☒ Monday

☐ Tuesday

☐ Wednesday

☐ Thursday

☒ Friday

☐ Saturday

☐ Sunday

Order By Time

00:00

Delivery Day

N/A

Schedule Overrides

Name

Start Date

End Date

Note

No data exists

Contact Information

Name

Title

Phone

Message

Private Notes Regarding Vendor

A If you want to see the Vendor Details, select the ▼ (Expand) icon.

2 Check the *Order Day* box for each date an order must be placed for this Vendor. This will create the “Vendor Order - Need to Order” task and determine the date the task must be completed.

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Configure Vendor Delivery Schedules

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Setup Vendor Information (continued)

Net-Chef > Purchasing: Vendor Information > {Edit}

crunchtime

NET-CHEF

John

301 - Cardiff

Vendor Information > Finch Foodservice

Vendor Details

Default Schedule

Order Day	Order By Time	Delivery Day
☒ Monday	11:00	N/A
☐ Tuesday	00:00	N/A
☐ Wednesday	00:00	N/A
☐ Thursday	00:00	N/A
☒ Friday	11:00	N/A
☐ Saturday	00:00	N/A
☐ Sunday	00:00	N/A

Schedule Overrides

Name	Start Date	End Date	Note
No data exists			

Contact Information

Name

Title

Phone

Message

Private Notes Regarding Vendor

3 Enter the *Order By Time* for that day in 24-hour time format. This will determine when the task becomes overdue. (If this is not defined, the task will be overdue the next day.)



Note: If the “Vendor Order Exp. Del. Date respects Order By Time” flag is enabled in the Vendor details in Enterprise Manager, the *Order By Time* will become a hard deadline. Any orders placed after the Order By Time will be treated as if they were placed on the next day, and the Expected Delivery Date will be set according to the Delivery Information for that day.

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Configure Vendor Delivery Schedules

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Setup Vendor Information (continued)

Net-Chef > Purchasing: Vendor Information > {Edit}

Vendor Information > Finch Foodservice

Vendor Details

Default Schedule

Order Day	Order By Time	Delivery Day
☒ Monday	11:00	Tuesday X
☐ Tuesday	00:00	N/A
☐ Wednesday	00:00	N/A
☐ Thursday	00:00	N/A
☒ Friday	11:00	Monday X
☐ Saturday	00:00	N/A
☐ Sunday	00:00	N/A

Schedule Overrides

Name	Start Date	End Date ↑	Note
No data exists			

Contact Information

Name Title Phone

Message Private Notes Regarding Vendor

- 4** Select a specific *Delivery Day* from the drop-down menu to specify when the order will arrive.
- Choose '{Day}' for a delivery date within the week after the Order Day.
 - Choose '2nd {Day}' for a delivery date within the week after that.
 - Choose '3rd {Day}' for a delivery date within the following week after that.



Tip: A *Delivery Day* can be set for any day of the week, regardless of whether the *Order Day* box is checked for that day. Orders created on an unchecked *Order Day* with a set *Delivery Day* will have the Expected Delivery Date automatically set to match the *Delivery Day*.

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Configure Vendor Delivery Schedules

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Setup Vendor Information (Continued)

Net-Chef > Purchasing: Vendor Information > {Edit}

Vendor Information > Finch Foodservice

Vendor Details

Default Schedule

Order Day	Order By Time	Delivery Day
☒ Monday	11:00	Tuesday
☐ Tuesday	00:00	N/A
☐ Wednesday	00:00	N/A
☐ Thursday	00:00	N/A
☒ Friday	11:00	Monday
☐ Saturday	00:00	N/A
☐ Sunday	00:00	N/A

Schedule Overrides

Name	Start Date	End Date ↑	Note
No data exists			

Contact Information

Name	Title	Phone
Samantha Groves	VP - Food Sales	212-410-7202

Message

Please deliver before 10am.

Private Notes Regarding Vendor

Open back door for driver. Always delivers on time.

8 [Save Icon]

Steps 5 - 7 are optional:

- 5** Enter the *Name*, *Title*, and *Phone* of the vendor's contact person.
- 6** Create a *Message* that will appear on orders from the current location to this vendor.
- 7** Provide *Private Notes Regarding the Vendor*, for reference purposes only.
- 8** When finished, select the *Disk (Save)* icon.



Tip: When Auto-Order is enabled, the Order and Delivery Information will be used to determine the dates and times orders are automatically placed for this vendor.

Set Delivery Schedule Overrides

Overview

Schedule Overrides allow managers to define one or more alternate schedules, each for a specific time frame, to account for holidays or other changes to the normal ordering cycle. A dated delivery schedule will override the existing settings within the defined date range, but outside of those dates the default schedule will apply.

Add a Delivery Schedule Override

Net-Chef > Purchasing: Vendor Information > {Edit}

crunchtime NET-CHEF

John

301 - Cardiff

Vendor Information > Finch Foodservice

Vendor Details

Default Schedule

Order Day	Order By Time	Delivery Day
☒ Monday	11:00	Tuesday
☐ Tuesday	00:00	N/A
☐ Wednesday	00:00	N/A
☐ Thursday	00:00	N/A
☒ Friday	11:00	Monday
☐ Saturday	00:00	N/A
☐ Sunday	00:00	N/A

Schedule Overrides

Name	Start Date	End Date	Note
No data exists			

Contact Information

Name	Title	Phone
Samantha Groves	VP - Food Sales	212-410-7202
Message		Private Notes Regarding Vendor
Please deliver before 10am.		Open back door for driver. Always delivers on time.

1 From the Vendor Information detail screen, select the + (Add) icon.

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Configure Delivery Schedule Overrides

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Add a Delivery Schedule Override (continued)

Net-Chef > Purchasing: Vendor Information > {Edit} > Add

Edit Override

2 Name* Christmas Week

3 Start Date* 2023-12-25 End Date* 2023-12-31

Override Schedule

Order Day	Order By Time	Delivery Day
☐ Monday	00:00	N/A
☒ Tuesday	11:00	Wednesday
☐ Wednesday	00:00	N/A
☐ Thursday	00:00	N/A
☒ Friday	00:00	Tuesday
☐ Saturday	00:00	N/A
☐ Sunday	00:00	N/A

5 Note
Closed on Monday, December 25 and Monday, January 1 - no orders or deliveries.

6 Save

- 2 Enter the *Name* of the schedule override.
- 3 Select the *Start Date* and *End Date*.
- 4 Define the *Order Day*, *Order by (Time)*, and *Delivery Day* for each day as needed.
- 5 If needed, enter a *Note*.
- 6 Select **Save**.



Outcome: For this week, the first order would be placed on Tuesday, Dec. 26, for delivery on Wednesday, Dec. 27, and the second order on Friday, Dec. 29 for delivery on Tuesday, Jan. 2.

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Configure Delivery Schedule Overrides

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Add a Delivery Schedule Override (continued)

Net-Chef > Purchasing: Vendor Information > {Edit} > Add

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JR John

301 - Cardiff

[→]

Vendor Information > Finch Foodservice

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Vendor Details

Default Schedule

Order Day	Order By Time	Delivery Day
☒ Monday	11:00	Tuesday
☐ Tuesday	00:00	N/A
☐ Wednesday	00:00	N/A
☐ Thursday	00:00	N/A
☒ Friday	11:00	Monday
☐ Saturday	00:00	N/A
☐ Sunday	00:00	N/A

Schedule Overrides

Name	Start Date	End Date	Note
Christmas Week	2023-12-25	2023-12-31	Closed on Monday, ...

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Contact Information

Name	Title	Phone
Samantha Groves	VP - Food Sales	212-410-7202

Message

Please deliver before 10am.

Private Notes Regarding Vendor

Open back door for driver. Always delivers on time.

A If you need to amend the schedule override, select the ➤ (Edit) icon.

7 When finished, select the *Disk* (Save) icon.