CRUNCHTIME! ENTERPRISE MANAGER

Use Catering via Customer Orders to Drive Daily Prep

Setup Guide

Document Details

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Overview

This setup guide teaches you everything you need to know to have Customer Orders drive Daily Prep.

System Requirements

- CES Version 06.10.00 or higher
- Be sure to grab the latest version of this document here: https://links.crunchtime.com/SG-UseCateringToDriveDailyPrep

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Use Catering via Customer Orders to Drive Daily Prep

How it's Used

As part of your Daily Prep planning, you can choose to include the prep recipes that will be needed for upcoming Catering Orders. Doing so will save time, ensure you'll have enough prepared recipes to meet sales, and avoid disruptive last minute prep.

In short, here's how it works:

1. You'll set up EM to include catering orders in Projected Consumption
2. When a location receives an order, they'll create a Customer Order, and flag it as a *Catering Order*
3. On the Catering Order they'll list only the items that involve prep
4. The Daily Prep plan will then include those recipes
5. When Daily Prep is finalized, the Catering Order will **auto-cancel**[1] itself.
6. When your customer comes to pick up the food, a new sale including all items will be **rung into the POS** and paid for with cash, credit, or via "open account" (where your accounting team will invoice the customer).
7. Depletion happens via the POS

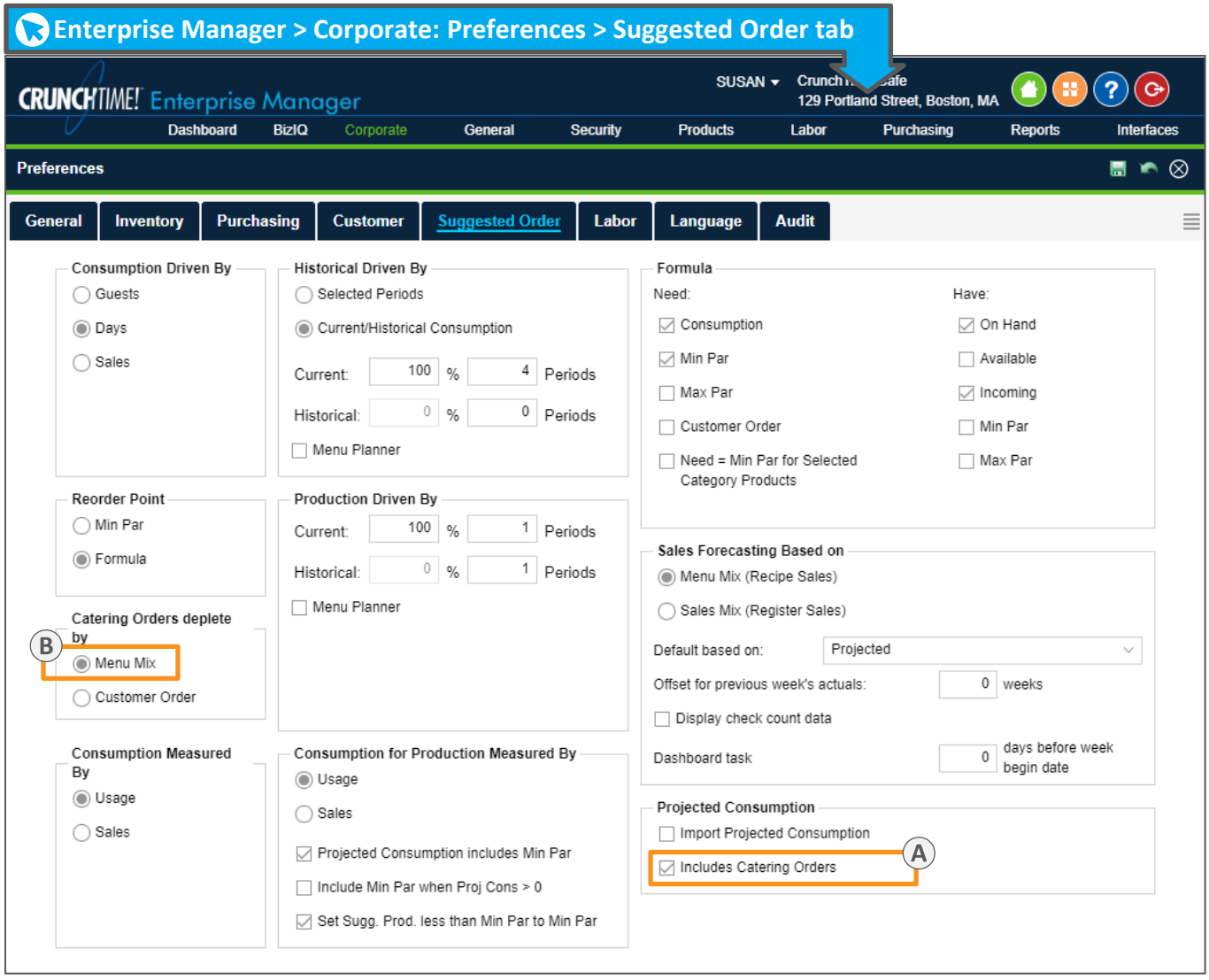
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Use Catering via Customer Orders to Drive Daily Prep (Continued)

Enterprise Manager (EM) Setup:

1. Corporate > Preferences > Suggested Order tab:
   - (A) *Project Consumption = Includes Catering Orders*
   - (B) *Catering Orders deplete by = Menu Mix*



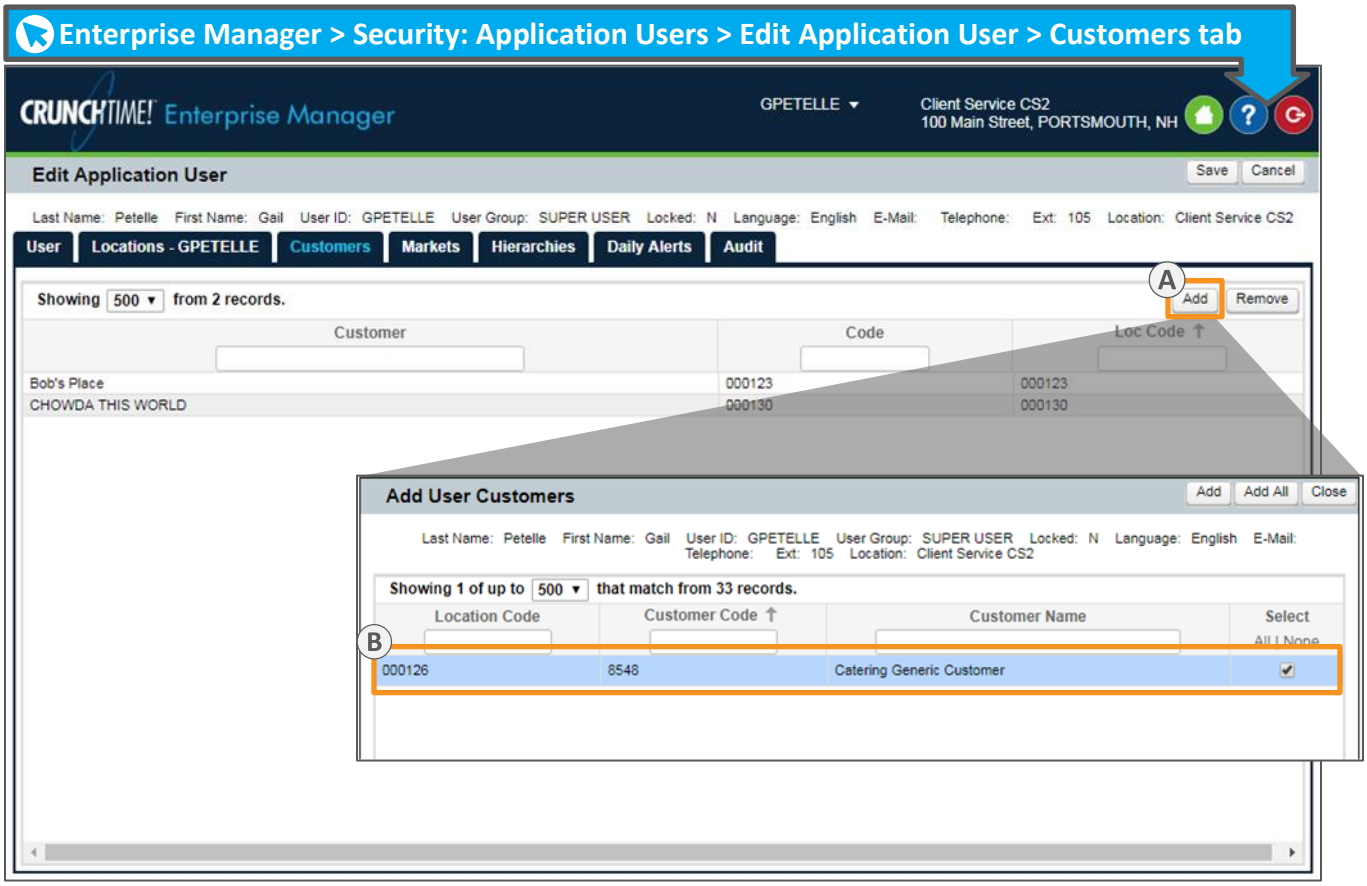
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Use Catering via Customer Orders to Drive Daily Prep (Continued)

Enterprise Manager (EM) Setup (Continued):

2. Create a "customer" for each catering location via EM (A). This will be used to create customer orders.
    a. **Best Practice** – Use one generic customer for all orders, one per day. (B)
    Remember, these will hold only the prep recipes needed to derive daily prep, so you don't need customer contact info etc.
    b. **Don't Forget** – Customers need to be linked to necessary application users. (Why? If you're going be the one creating customer orders, your application user must be linked to that customer.)



3. Add the finished plate recipes needed for catering orders to a storage location for catering locations (making them location products).
    a. **Best Practice:** make a separate storage location just for these items.

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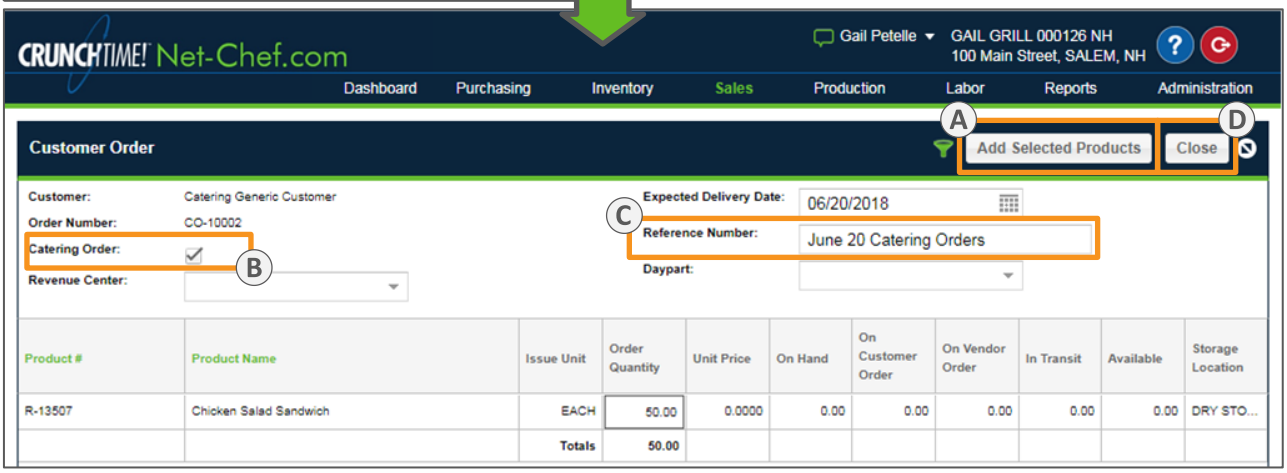
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Use Catering via Customer Orders to Drive Daily Prep (Continued)

Net-Chef (NC) Process:

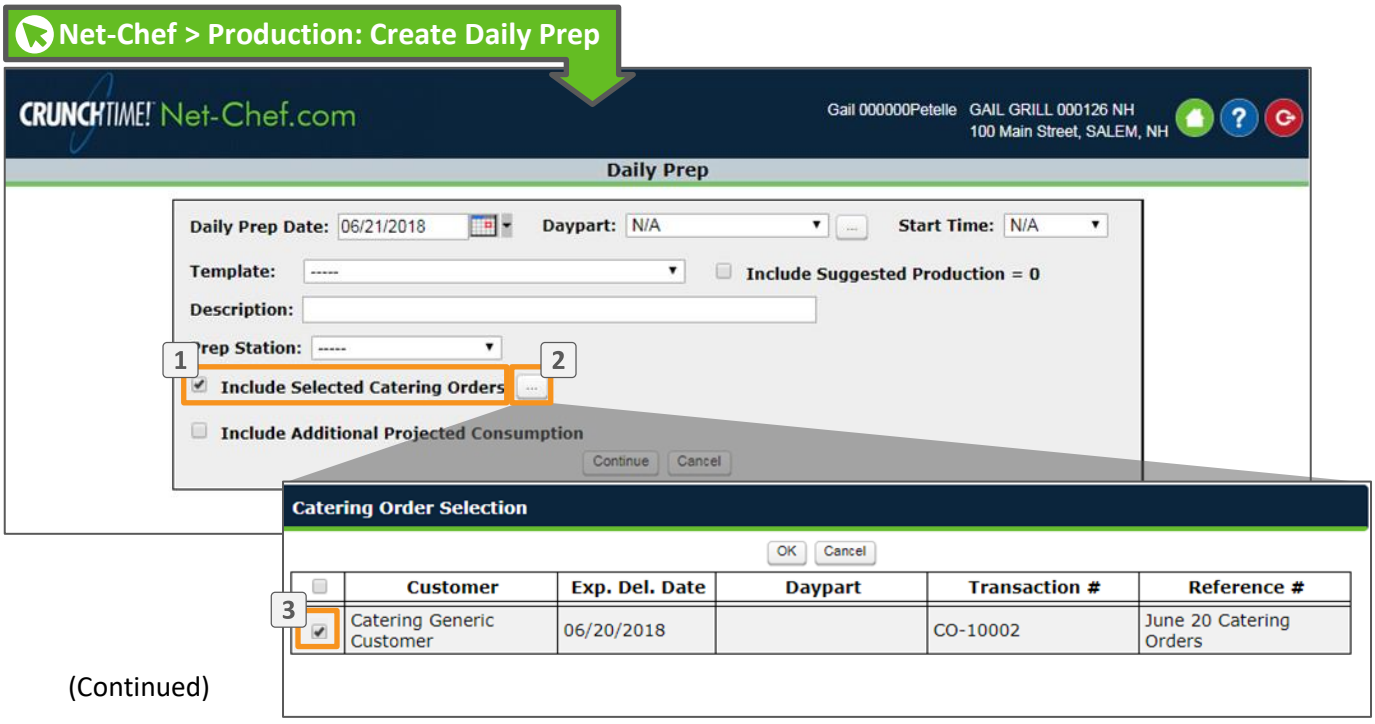
1. Create a Customer Order (NC).
   - (A) Add all the POS recipes needed to drive Daily Prep. (Chicken Salad Sandwich contains prep recipes for chicken salad and sliced tomatoes)
   - (B) IMPORTANT: In *Customer Order* screen select *Catering Order*.
   - (C) Add *Referenced Number*. Best Practice: Use the date as reference number
   - (D) Save/Close

Net-Chef > Sales: Create Customer Order



2. Create Daily Prep *IMPORTANT - Select *Include selected catering orders* [1]. Click on the ellipsis (…) to find the applicable customer order [2], and check the box [3].

Net-Chef > Production: Create Daily Prep



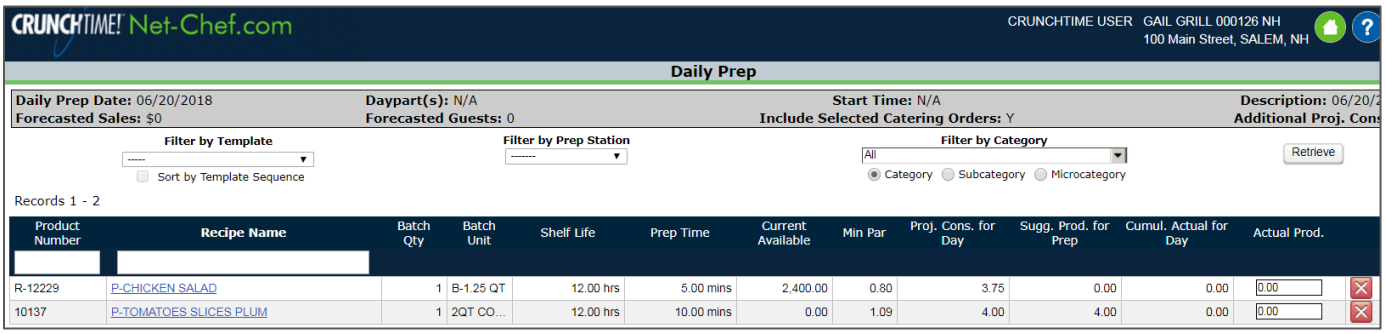
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Use Catering via Customer Orders to Drive Daily Prep (Continued)

Net-Chef (NC) Process (Continued):

Daily prep will now include the daily prep recipes (and sub prep recipes) needed for the catering order:



3. Once the daily prep event that is linked to the catering order is finalized, the Catering/Customer Order will automatically be canceled.
4. You must eventually ring this transaction in via POS for depletion of the components and prep recipe associated with the “top level” POS recipe

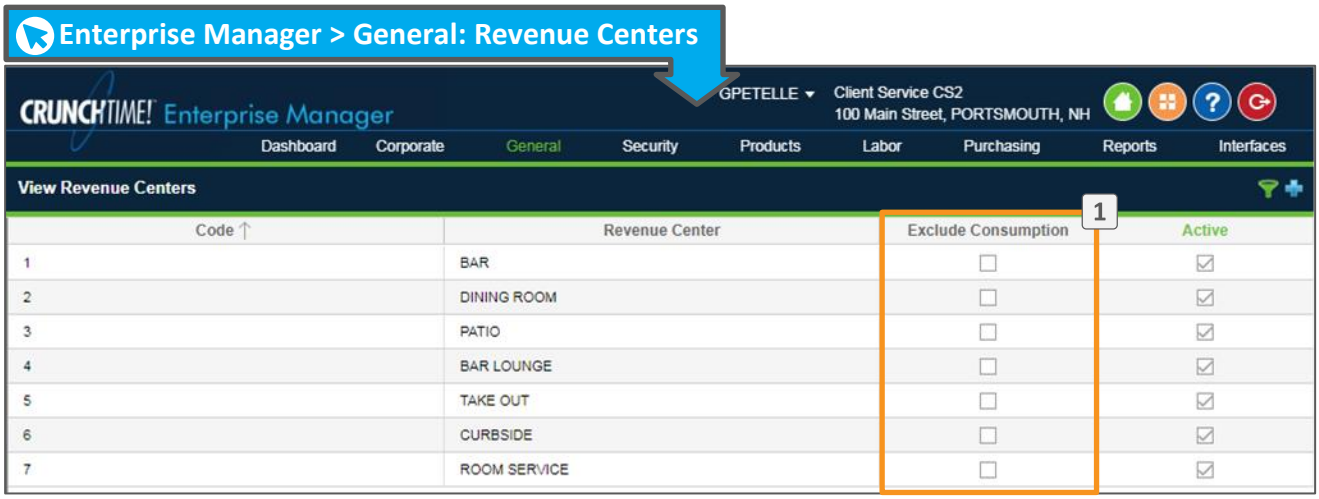
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Use Catering via Customer Orders to Drive Daily Prep (Continued)

Considerations:

1. Do you want catering sales to impact your daily prep suggestions going forward (following weeks)?
    a. **Best Practice** – Do NOT have them impact Daily Prep going forward; instead set up a specific revenue center for these transaction, and have all POS catering sales rung in via that revenue center.
        1 Flag that revenue center so it *Excludes Consumption*. This will exclude the catering sales from the projected consumption, thereby avoiding suggesting more than needed in the weeks to follow.



2. If you'd prefer to avoid ringing catering sales into the POS…
    a. Do the same EM setup as above, EXCEPT in Suggested Order, set Projected Consumption to: *Includes Catering Orders* and *Catering Orders deplete by Customer Order*
    b. The locations will create Customer Orders and flag them as *Catering Orders*
    c. They'll include ALL items on the Catering Order (not just those that involve prep)
    d. When the customer picks up the order, it will be finalized in the Customer Order screen.
    e. No POS work is involved- depletion happens via order finalization.

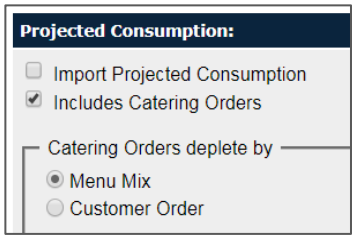
Notes

1 – Auto Cancellation of Catering Orders – How it Works

When we added Catering orders in 05.20, we created a mechanism where catering orders would be canceled by finalizing daily prep if **all** of the following conditions apply:

- The Customer Order is flagged as a *Catering Order* (either in app or in the import)
- The *Catering Orders deplete by* setting is set to *Menu Mix* on the location's Suggested Order Setup (see image)
- Catering Order is linked to a daily prep plan

Having the orders auto-delete themselves means they can't be accidentally finalized, which ensures depletion happens **only** via the POS, and not accidentally through finalization and the POS.



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