

# FOOD COST MANAGEMENT QUICK START GUIDE

CHICKEN BREAST Stage Rules Stage Stade Sta

# QUICK START GUIDE: GET STARTED CHECKLIST



CHICKEN SANDWICH CHICKEN BREAST MAIN INGREOF \$4.39 per LB US FOODS vendor 18 LBS suggested purchase TOMORROW Next delivery

> PASTA CARBONARA EGG NOODLES MAIN INGREDIENT \$1.92.per lb US FOODS vendor 20 LBS suggested purchase

> > TOMORROW NEXT DELIVERY

#### WELCOME TO AVERO FOOD COST MANAGEMENT!

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

### STEP 1: SET UP YOUR KITCHEN & VENDORS

Add your vendors

### STEP 2: SET UP YOUR INVENTORY & PRODUCT LIST

- Create your storage areas
  - Add the rest of your products
- Put your products in the right order
- Take your first inventory count
  - Avero Mobile App inventory steps

#### STEP 3: CREATE YOUR SHOPPING LIST & PLACE YOUR FIRST ORDER

Create your shopping lists

Place your first order

US Foods Orders

Non-US Foods Orders





## STEP 1: SET UP YOUR KITCHEN & VENDORS

Set	tings 🕨	Vendor Info			R Check Search	<b>Ö</b> (	Calendar	🗟 Log	book	🗈 Saved Rep	iorts	<b>₩ \$</b> 9407.1
	Kitche	en Info Vendor Inf	o Data Copy									
	Kitch	en										
	The O	liner	Ø									
	Veed	an Information										
	venu	or mitor mation	_									
	Sele	et.	• Add	Three Floyds Setting								
	•	Three Floyds	1.1	Customer #	7	699375769	5	Z	2			
		USFoods	1	Salesperson Email	c	shoener@a	veroinc.com		2			
		Tinga Braising Water	1	Min Order Amount	5	1500			2			
		liTerior	1	Delivery Schedule								
			1		Day	/ Of Week	Delievery Day	Order Cut of	t Time			
		NA				SUN		12:45	O PM O	SUN 🛇		
		Sysco				TUE		12:45	O PM O	SUN O		
		US Foods	1			WED		12:45	O PM O	SUN C		
		Southern Wine	1			THU		12:45	O PM O	SUN O		
		Tony's Bakery	1			FRI		9:00	O AM O	пни 🔘		
		Restaurant Depot	1			SAT		12:45	O PM O	SUN 🛇		
		000	1									
		PHG								Cance	el Save	
-	0	Recipe										

### LET'S GET STARTED!

If you're reading this guide, you're ready to start managing your purchasing more effectively than ever. So, let's begin optimizing your purchasing and inventory, while keeping your costs in check! Follow the instructions in these quick guides to get set up for success with Avero Food Cost Management.

### WHO DO YOU PURCHASE FROM?

Setting up your vendors is quick and easy. You must set up a vendor before you can add products from that vendor into the system.

- 1. Select the Settings menu, then Vendor Setup
- 2. Select the Vendor Info tab, then select the kitchen you want to set up
- Under the Vendor Information heading, click Add to add a new vendor Pro Tip: Enter new vendors at the bottom of the Vendor list.
- 4. Click the radio button next to the new vendor name
- Enter Customer #, Salesperson Email, Min Order Amount and Delivery Schedule for this vendor on the right. Delivery Schedule is required for all vendors - without it, you won't see suggested purchase amounts.
   Pro Tip: Any errors in the settings listed above may result in problems with ordering and deliveries! Be sure to verify all entries before saving.
- 6. Click Save

3

Nice job! You've completed Step 1 of 3 in the FCM setup process – that was easy, right?!? You're well on your way to becoming a food cost management rockstar. Up next is inventory setup in the next guide! See you there.



Settings  Storage Area Settings		려 Check Search	Calendar	B Logbook	Saved Reports	\$7508.81
Storage Area Settings Upload P	Product Ranking					
Kitchen						
Expected Count	_					
Show expected count on inventory wo	orksheets : OFF					
Ranking dictates order in which invent	tony worksheets will annear during	full inventory Drag & drop to rev	rder			
Cycle Count Settings :						
Recurring Inventory Cycle Count Tasks	:0: 0FF					
1						
2						
						_

### SET UP YOUR INVENTORY & PRODUCT LIST

You're already well on your way to revolutionary cost management at your restaurant. So, let's continue with the next step! Follow the instructions below to get set up for success with Avero Food Cost Management:

### **CREATE YOUR STORAGE AREAS**

Entering your storage areas now makes adding products later even easier. You must set up a storage area before you can add products to that storage area for inventory purposes.

- 1. Select the Settings menu, then Inventory Setup
- 2. Select the Storage Area Settings tab, then select the kitchen you'd like to set up
- 3. Under the Manage Storage Area settings, click Add and enter your new storage area name and click Save
- 4. To change the order in which your storage areas appear on your inventory worksheet, click and drag the icon with three horizontal bars to the left of the storage area to re-order

© 2017 Avero, LLC. All rights reserved.

5. Click Save





#### ADD THE REST OF YOUR PRODUCTS

Thanks to the deep integration between US Foods and Avero, all US Foods products you've purchased within the last 3 months have been imported into the system automatically! Now is a good time to add the rest of your products that you buy from other vendors.

- 1. Select the Settings menu, then Product List
- 2. In the Product List report header, click Add Product
- If you are adding just a few products, click Add Manually, enter product details and click Save. Be sure to fill out all required fields
- 4. If you are adding many products, uploading products is the fastest method of entry. From the Add Product popup, click Upload
- Download the template, upload Instructions, and Product Guide and follow the steps to ensure a successful upload

Pro Tip: Common Pitfalls - Make sure there are no duplicate Vendor ID #'s for products from the same vendor. Ensure you are following the formats listed in the 'Instructions' and 'Product Guide' sheets. Both files can be downloaded from the upload popup.

Pro Tip: Make sure to fill in the required columns. Some columns are required if you fill out the one next to it, so make sure to look at the "Required" row in the instructions to see if you've added all the right info.

6. Do not change the file extension or delete/add columns or the file will not upload

© 2017 Avero, LLC. All rights reserved.

# STEP 2: Set up your Inventory & PRODUCT LIST

	Settings & Storage Area Settings 🕲 Check Search 🔟 Calendar 🕑 Logbook 🖄 Sweed Reports 🔭 \$7568.81
•	Storage Area Settings Upload Product Ranking
	Kitchen
	SELECT A NITCHEN
	Expected Count
60	Show expected count on inventory worksheets : OPF
	Manage Storage Areas:
	Ranking dictates order in which inventory worksheets will appear during full inventory Drag & drop to re-order
	Cycle Count Settings :
	Recurring Inventory Cycle Count Tasks@: OFF
	4

### NOW, GET YOUR PRODUCTS IN THE RIGHT ORDER

Arrange the products in your storage areas in the order you are used to. It will help you to take inventory counts more quickly and effectively.

- Before arranging your products within a storage area, make sure you've added all your products to their respective storage areas. If you have already put your products into storage areas, skip to step 5
- 2. To mass-add products to storage areas, select the Settings menu, then Product List
- Multi-select all products within one storage area by clicking the check box next to each item, then click the Edit Products dropdown located in the Product List report header and click Storage Areas
- 4. Select the Storage Area(s) to which you would like to add these products and click Save
- 5. Now, select the Settings menu, then Inventory Setup
- 6. Select the Upload Product Ranking tab, then select the kitchen you want to set up
- 7. Select the Storage Area list you would like to arrange, and click Download
- 8. Follow the instructions on the screen to re-arrange the Inventory list to your desired order
- Do not change the file extension or delete/add columns or the file will not upload

© 2017 Avero, LLC. All rights reserved.



	Inventory  Inventory Tasks		<b>R</b> .	Check Search	Calendar	🗟 Logbook	Saved Reports	₩ \$0.00
	🖶 Kitchen	Inventory Status		Inventory Type		<b>m</b> D	Je by	
	The Diner	I AI		AI		о <b>н</b>	a	
l		Past Due		Pull Count     Ovrie Count		0 N	est	
1		Complete		Class Count		14	O Day	0
1				Spot-Check				
ł								
ł	Avero Report Generator							Go
L								
l	Assign inventory			The Dir	er — Inventory Tasks 06/14/2017		8	⊠ ≰ 🖨
l	Assign New Inventory	٠	Inventory	type	Due	Þy	Assigned To	
l			Class Count		06/13/17		Dalsy D	
l	Inventory	Ŧ	Pull Count		06/04/17		Brandi V	
l	The Diner	٣	Pull Count		05/11/17		Brandi V	
l			Spot-Check		05/01/17		Dalsy D	
	Full Count		Spot-Check		05/08/17		Brandi V	
ł	1		Class Count		05/05/17		Brandi V	
1	Inventory: Full Count		Pull Count		06/25/17		Richard G	
l			Pull Count		05/14/17		AJR	
l	What is the task?	hat is the task?			06/14/17		Anthony S, Ivan P	
l	0		Pull Count		06/14/17		Ivan P	
l	0		Pull Count		08/15/17		John H	
I	Due:06/14/2017	140	Poli Count		00/13/17		John H	
I		Cancel Post	Class Count		00/10/17		Anthony S	
L	05/14/2017		Class Court		00/14/17		Antitiony 5	

#### TAKE YOUR FIRST INVENTORY COUNT

Taking inventory is an important step of keeping your food costs in check. Inventory counts give you clarity on what you have on hand, so you know what to prep and what to order next. Plus, regular inventory counts are a good way to maintain fresh ingredients and deter theft from your kitchen.

- 1. To take your first inventory count, select Inventory, then Inventory Tasks from the navigation pane on the left side of the screen.
- 2. In the Inventory Tasks report header, click Assign Inventory
- 3. Select your kitchen, then select Full Count (Class Count inventory types are for counting specific product classes like 'Produce')
- 4. Enter a username to assign them the inventory task
- 5. Select the task due date and click Post to save the task
- If you will be entering inventory from the website, continue to steps 7-12 below. If you will be taking inventory on the Avero mobile app, skip to Mobile App Inventory Steps on the next page.
- 7. In the Inventory Tasks report, find your newly created task and click the blue hyperlinked task type to open the Inventory Worksheet
- 8. Click Start Inventory to load the worksheet
- Move down the list, entering the actual count of each product by using the +/- icons or by typing directly into the field
- 10. When you have finished the sheet, click the Confirm All button in the header of the worksheet to save
- 11. Continue to the next Storage Area tab and repeat steps 9 & 10
- 12. When you have confirmed all tabs, the Finish Inventory button will activate. Click the button to complete your inventory count





	P			12:30
	← Count (	م	+	=
	Storage 1 (2/25) Storage 2	0	St	orage 3
	SOUTHWEST BASE CUSTOM CULINARY GOLD LABE • US F	oods	~	:
	BASE, SOUTHWEST ANCHO LIME PASTE NO MSG SHELF 12.1	84 🕨	11	CS
	6/12 OZ   \$32.37/CS   \$2.37/EA		2	EA
	STEAK EXCEL • Sysco		$\checkmark$	:
	BEEF, BOTTOM SIRLOIN BUTT 11 FLAP CHOICE 18	.5 •	12.66	LB
	16/3.5-4.8#A   \$3.21/LB			
	TORTILLA CHIP LA CANASTA MEXICAN FOOD • Performa	ance	Food Grou	qı
	TORTILLA, CHIP RAW 6 CUT WHITE CORN 6" REF	5 🕨		cs
	25 LB   \$27.35/CS			
	0			
11 1 .			14.	

#### MOBILE APP INVENTORY STEPS

The Avero mobile app allows you to view and complete inventory tasks from your smartphone. You can access your inventory worksheet to complete the inventory task while easily moving around your storage areas with your mobile device in hand.

- 7. Have the user performing the count log in to the Avero FCM mobile app
- 8. If the user has access to multiple kitchens, use the righthand navigation menu to select your desired kitchen ( $\equiv$ )
- 9. From the main screen:
- If starting a new Full Count, click 'Start New Inventory Count' button and select 'Full Count'
- If starting a new Class Count, Spot Check, or Cycle Count, you must select a count that has been pre-opened on Avero desktop from the 'Active Count' list
- 10. Begin entering the count of each product, moving down the list by using the 'Next' button.
- Other users may count with you simultaneously by logging in on their own mobile device and joining the count from the Active Counts menu
- If your device is not connected to the internet, your entries are automatically saved, and will sync with Avero once you connect back to the internet
- 12. When you are finished with a storage area, continue to the next Storage Area tab and repeat.
- 13. When you have counted all storage areas, use the righthand navigation menu(≡) to complete the count.

Hooray! You just completed 2 out of 3 steps in the FCM setup process! Just one more easy step, and you'll be fully up and running. Last but not least is ordering setup in the next guide. You're in the home stretch!





# STEP 3: PLACING YOUR FIRST ORDER



#### CREATE YOUR SHOPPING LIST & PLACE YOUR FIRST ORDER

Amazing! You're almost done setting yourself up for revolutionary cost management at your restaurant. So, let's finish this! Follow the instructions below to be fully up and running with Avero Food Cost Management:

### CREATE YOUR SHOPPING LISTS

Shopping Lists are a great way to streamline ordering by narrowing your products down to a list of those that you order most often. You should use Shopping Lists just as you used Order Guides in US Foods e-Comm. Start by creating a Shopping List for your biggest weekly order.

- 1. Select Purchasing, then Place Order
- 2. In the Place Order report, multi-select all products you would like to add to your Shopping List, and click Add to List
- 3. In the popup, select New List, enter the name of your new Shopping List, and click the check mark
- If desired, click and drag the three-line icon to the left of the Shopping List name to change the order in which the Shopping Lists appear in the Report Generator
- 5. Select the radio-button next to your newly created Shopping List
- 6. Click Save



# **STEP 3: PLACING YOUR FIRST ORDER**

Purchasing 🕨			B (7							
# Kitchen	Add Product		PO #16710	8 - USFoods				• • •	۲	•
The Dine	Product Code		Product	Quantity	Unit Price	Total Price				\$7508.81
	Beverage								^	
	150771	JUICE, P	NEAPPLE 100% ASEPTIC CARTON SHELF.	105	\$35.94/CS	\$35.94	1	ά (		
	Dairy									
	150601	BUTTER	SOLID GRD AA UNSL	ecs	\$94,46/CS	\$566.76	1			_
	150750	CHEESE	CHEDR MILD SHRD F	4CS	\$51.88/CS	\$207.52	1	0		
Avero R	150852	CHEESE	CRM PLN LOAF	3C5	\$68.12/CS	\$204.36	1			\$7508.81
	150680	CHEESE	PARM GRTD BAG REF	205	\$94.39/CS	\$188.78				>
TR Add to	150578	CHEESE	PARM SHRD FCY REF	205	\$24.46/CS	\$45.92	1		*	
	Total	82 Products					\$75	08.81		
	Delete Order		Ordered by :	Selec	t Status 🔻		Send	to USFood	s	
	Delete Order		Received by :	Est.Deli	ery Date: 06/16/2017		_			
				- (						
Shallot		×	Farm Fresh Foods 1	0 (0 days)	\$5.00	- 00	s •	Suggested	0.00 CS	
Sesam		×	Farm Presh Foods 1	0 (0 days)	\$12.00	- 0 0	5 +	Suggested	0.00 CS	
	en Salad Oli	×	Farm Presh Foods 2	0 (0 clays)	\$20.85	- 00	5 +	Suggested	0.00 CS	
					\$10.70	- 0 E	A +	Suggested	0.00 E/	
E85		×	Farm Presh Foods 5	0 (0 days)	\$14,00	- 00	5 +	Suggested	0.00 CS	

#### PLACE YOUR FIRST ORDER

- 1. Select Purchasing, then Place Order
- 2. In the Report Generator, select desired Vendor(s), Shopping List, and other filters
- 3. Click Go to generate Place Order report
- 4. Suggested Purchase quantities will populate for all products that Avero recommends you buy, as long as the product has been in either 2+ completed Inventory Counts, 2+ received Purchase Orders, or 1+ completed Inventory Count and 1+ received Purchase Order
- You can either check off one at a time, or use the checkbox in the report header to Select All. Please note that if you use Select All, all products with non-zero product quantities will be added to the cart
- 6. When you are finished, click the green Cart tab at the top of the page, find your desired Purchase Order, and click the PO Number.
- Depending on the vendor you are ordering from, continue to either the US Foods Orders section or the Non-US Foods Orders section below.

#### **US FOODS ORDERS**

- In the popup, verify order quantities and units for all products
   Pro Tip: Make sure your popup blocker is permanently disabled for this page! If popup blocker is enabled, US Foods orders will not go through because the popup confirmation window will fail to open.
- 9. When your order is finalized, click Send to US Foods to submit
- 10. An e-Comm confirmation popup will open. Follow the on-screen instructions to clear any exceptions/substitutions and confirm



# **STEP 3: PLACING YOUR FIRST ORDER**

	<ul> <li>Place Order</li> </ul>							
# Kitche	Add Product		PO #1662	16 - Tony's Bakery			• • • •	- • I
The Di	ne Product Code		Product	Quantity	Unit Price	Total Price		
	Fish & Seafood							\$7539.56
	1702560	Siva Proditesi	1372017	105	\$20.00/CS	\$20.00	/ 8	2
	Grocery							
	687994	BREAD, SOUP	DOUGH LOAF	205	\$25.25/CS	\$50.50	/ 8	
	687994	BREAD, SOUP	DOUGH LOAF	2EA	\$0.00/EA	\$0.00	/ 8	
Avero	R 3770345	Com Tortilla	2.	1EA	\$1.00/EA	\$1.00	/ 8	\$30.75
	3770345	Com Tortilla	5*	105	\$2.10/CS	\$2.10	× 8	
TR Add	1595112	Combread		1C5	\$10.00/CS	\$10.00	/8 +	
	Total	11 Products					\$110.25	
	Delete Order		Ordered by :	Selec	Status 🔻	Send to	o Tony's Bakery	
			Received by	Est.Deliv	ery Date: 06/15/2017	,		
	1957 mar							06/14/17
		🗮 jimmys				- 1 6	+ suggested 0.00 CS	06/14/17
		🗮 Redred blue	Tony's Bakery	10 0 KG (0 days)	\$20.00	1 C	Suggested 0.00 CS	06/14/17
		🗮 Mama Lolas	Tony's Bakery	1/4 2 CS (0 days)	\$2.10	- 1 CS	+ Suggested 0.00 CS	06/14/17
					\$1.00	- 1 EA	+ Suggested 0.00 EA	
		🗮 Mama Lolas	Tony's Bakery	1/3 3 CS (0 days)	\$4.65	- 1 05	Suggested 0.00 CS	06/14/17
					\$1.00	• 1 EA	Suggested 0.00 EA	
		🖮 Bunz & Breadz	Tony's Bakery	1 0 (0 days)	\$9.00	- 1 6	Suggested 0.00 CS	

#### NON-US FOODS ORDERS

- 8. In the popup, verify order quantities and units for all products
- 9. When your order is finalized, click Send to [Vendor] to submit
- 10. An email with your order details has been sent to your vendor salesperson contact email, which can be edited from Vendor Setup under the Settings menu. A copy will also be sent to the email associated with your username, which can be edited from Account Settings

### **CONGRATULATIONS!**

You've completed Step 3 of 3 in the FCM setup process! That means you're 100% set up for success with Avero FCM. Keep taking regular counts and placing orders through FCM and managing your food costs will be easier than ever, so you can get back to doing what you love - spending time with your food, staff, guests and family!

