

**UNIVERSITY OF VERMONT  
CATERING WEB SITE**



**FOOD VENUE MANUAL**

**AUGUST 2006**

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## WEB SITE ADDRESS

Connect to University Dining Services Catering Web site at <http://www.sodexhostore.com/uvm> or link from the University Dining Services Web site at <http://uds.uvm.edu>. User must use Internet Explorer as their browser.

## CATERING INFORMATION

Located on each page is the link VIEW CATERING INFORMATION. This link provides details about the Catering office; general information, hours of operation, payments accepted and any ordering rules.

## NAVIGATION TOOL BAR

- Home
- View Menu
- Search Items
- View Your Events
- Purchaser Report
- Your Profile
- Sign Out

## NEW ACCOUNT

### **Creating a New Account:**

First time users are required to set up an account by selecting the CREATE NEW ACCOUNT link listed under Online Ordering on the Home Page. Creating a new account allows the user to set up a personal profile, allowing for online ordering. Your personal profile is password protected, which will act as your login for future visits to our site. Setting up an account requires the following information:

- E-mail Address
- Password
- First Name
- Last Name
- Department Name
- Address
- Phone


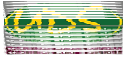
**Your Personal Profile:**

The user may update their Personal Profile and/or change their password by clicking the YOUR PROFILE button located on the navigation tool bar. Your Online Wallet is also located in Personal Profile.

**Online Wallet:**

Your Online Wallet is the place to store your Department’s chartstring and blanket purchase order numbers. These numbers are entered in either the Cost Center or Purchase Order drop down. The user can edit their Online Wallet thru YOUR PROFILE located on the navigation tool bar.

Chartstring numbers must be entered in the following 51 digit format:  
12345,12,12345,123,123456,123,////,////,////,0000,0000,0000

**Dining Services Chartstring**

Chartstring Description:										Contact:					Ext:	
Comments:																
Account	Op Unit	Department	Fund	Source	Function	PC Business Unit		Project	Activity ID	Program	Purpose	Property				

<b>Account Options</b>		
60551	Refreshments	For business meetings and university functions and activities
60553	Business Meals	For business-related meals with both univ. and non-univ. members

To make edits to the Online Wallet click on YOUR PROFILE, the user is then presented with the option to add a new cost center or payment options, or edit/delete exiting ones. Upon completion click on Update Account to save changes.

**Login:**

Once an account has been created the user can begin placing orders online. Login using the e-mail address and password established at the time your account and personal profile were created. If you forgot your e-mail address or password please contact Catering at 802.656.7780 or technical support at 914.631.7223 for assistance.

**Preferred Location:**

The only preferred location available for this Web site is UVM, thus selecting a preferred location is not applicable.

## START AN ORDER

### Place an Order:

Login using your e-mail address and password. Click PLACE AN ORDER or PLACE A RAPID ORDER under Option “1” and enter the required information regarding your catering event.

The **Place an Order** option displays an expanded menu, and assists the user in selecting items, customizing orders, specifying quantities and familiarizing the user with each package and/or items.

The **Place a Rapid Order** option is for the user well-versed in the menu selection process. The “Place a Rapid Order” option displays a condensed view of the menu and allows the user to quickly order a la carte.

## EVENT INFORMATION

### Create a New Event:

Before you can add menu items to an order, you must create a new catering event. The user must complete the required information in the corresponding fields. Once information has been entered click UPDATE EVENT to save. Creating a new event requires the following information. :

#### Event Information:

- **Event Name** - state business purpose; create a name specific to the event.
- **Event Date**
- **Meeting Start Time**
- **Catering Set Up Complete Time** - the time you would like Catering to have your order delivered and set up. This can be before or after the official start of the event and within the time the space has been reserved.
- **Catering Pickup Time** - the time when you would like the catering items removed from your catering location.
- **Event Type** - select from a drop down menu
- **Service Style** - select from a drop down menu (list shown below)
  - Delivered China (fee) - order china from menu category.
  - Delivered Disposable (default)
  - Pick Up Disposable - events which the user will pick up at the designated kitchen.

#### Building Delivery:

- **Building Delivery Location** - select from a drop down menu, if your location is not

shown, select “other” and enter location in the comment field. Your location will be added to the drop down menu by Catering for future visits to the site.

- **Floor/Room Number** - be specific.

### **Client Information**

- **Contact Name** - person placing the order
- **Address** - on campus address
- **Secondary Address** - if applicable
- **Phone** - person placing the order
- **E-mail** - this e-mail address will get all automatic ordering e-mails
- **Reports to** - enter other individuals to receive orders e-mails, enter the company aliases or the full address for individuals outside of the company.
- **Event Information** - State business purpose. For events with eight or less guests, please list names, for events with more than eight guests please summarize attendees for UVM accounting.
- **Special Comments** - enter any requests, wishes or needs you have concerning the event or menu
- **CC List** - Enter other individuals to receive orders e-mails. Enter the Company alias or the full address for individuals outside of the company.

## **SELECT ITEMS**

When ordering using the **Place an Order** option. Click PLACE AN ORDER select a “Menu Category” from the drop down list, thus creating an expanded menu view. Select an item by clicking on the item name, then specify the quantity, enter any comments and if your selection is a package, customize your order. To save your selection and add it to your order click ADD TO ORDER at the bottom of the screen.

If you are ordering by using the **Place a Rapid Order** option. Click PLACE A RAPID ORDER select a “Menu Category” from the drop down list. This creates a condensed view of the menu. Select an item by entering the quantity desired, and clicking ADD TO ORDER. Orders can be customize by selecting ADD CUSTOMIZED ITEM, then entering the request in the special comments and/or if you are customizing a package, make your selections from the assorted offerings. After customizing your selection, add to your order by clicking ADD TO ORDER.

The RETURN TO MENU option returns you back to the expanded menu view without adding the selection to your order. Selected items will appear on the right hand side of the computer under MY ORDER.

## Search the Menu:

You can search for a specific menu item by accessing the SEARCH MENU icon on the navigation tool bar. You can enter any word or phrase to search within the menus.

## Custom Order:

For a custom order the user can use any of the special comments or instruction sections to provide information on any specials you may desire. If you have any questions or need additional help, please feel free to contact the Catering office.

## Servings vs Minimum Quantity:

The number of *servings* is how many people that item will feed, the *minimum quantity* is the minimum amount of that item you can order. Most of the menu items are priced per serving yet some of them have a minimum quantity requirement.

## MY ORDER

My Order acts as the users shopping cart. It is a summary of the items and quantities selected during the ordering process. My Order displays the subtotal, delivery charge, tax and the current total. Users can make changes to an event by clicking EDIT THIS EVENT and/or they can modify an item by clicking on the item name. If no event has been created My Order will appear empty.

Users will be able to perform multiple functions through the use of the four buttons located just below My Order:

- **VIEW** - displays the items in your shopping cart in detail. From the View screen, users can make changes to their order by clicking on the item name; or selecting one of the multiple options available.
- **CHECKOUT** - allows the user to confirm their order and starts the purchasing process.
- **NEW** - starts the process of creating a new catering event. Please note if the user is currently working on an event, the user will be prompted to DELETE, SAVE or CANCEL that current event prior to starting a New event.
  - **Delete** - will delete the current order and begin the process of developing a new order for submission. Delete is rarely used.
  - **Save** - is the best choice as it will store all the information of the current

order and begin the process of developing a new order for submission.

- **Cancel** - stops the process of creating a new order and allows you to continue to work in your current order.
  
- **DELETE** - gives the user the ability to cancel the event. Delete is rarely used as the user has the ability to log out of an order and reopen at a later date and revise. For any orders that are deleted, the Catering office can always reinstate deleted orders.

## **EDITING AN ORDER**

### **Remove a Single Item:**

Select an order to view and then select the VIEW button in My Order. Each individual item can be removed by selecting REMOVE at the far right hand side of the line item.

### **Edit a Single Item:**

Select an order and select the item name, which acts as a link to the item you wish to modify. The user can view the item in detail and modify the quantity ordered and/or any comments regarding the item.

### **Edit a Single Event/Order:**

Select an order to view, then select the EDIT THIS EVENT in My Order. The event information will be available for modification, beginning with the event creation page. Select UPDATE EVENT at the bottom of the form upon completion.

### **Saving an Order :**

If the user is in the middle of an order and mistakenly logs out, or needs to reboot their computer the order is automatically saved. The next time the user logs in the order will be listed on the Home Page as “In Progress” at which time, the user can continue working on it.

## **CHECKOUT**

Click on the checkout button located under My Order. The user will be prompted to confirm their order, upon review; click CONTINUE to select payment options. For any orders that require modification select from one of the options available.

Select method of payment from the drop down menu. For Cost Center users, select

which account type and the appropriate chartstring for the event. If you need to add a new chartstring, you can do so in the Special Cost Center field.

Chartstring numbers must be entered in the following 51 digit format:  
12345,12,12345,123,123456,123,/////,/////,////,0000,0000,0000

For Purchase Order users, enter your UVM Purchase Order number. Purchase Order numbers must be obtained from UVM Purchasing prior to ordering. For repetitive orders a “blanket” purchase order number is preferred by UVM accounting.

If you wish to pay with a credit card or check, please contact the Catering office for assistance.

To submit payment click CONTINUE. Users will receive a confirmation message stating the order was submitted, with the option to VIEW PRINT RECEIPT or to CONTINUE. The user can print a copy of the order receipt from the VIEW PRINT RECEIPT option. In addition, the user will receive an e-mail receipt of the order and payment details.

### **Was My Order Received?**

Once your order is received you will automatically receive an E-mail, verifying receipt.

### **Changes To My Order:**

If there are any changes made to your order by the user or the Catering office you will receive an e-mail notifying you of the changes.

### **Order Confirmation:**

You will receive an e-mail from catering confirming the event has been approved.

### **Change/Cancel an Order Already Placed:**

Yes, definitely. From the Home Page, click VIEW YOUR EVENTS. Once you have located the event you can edit or cancel the event entirely if necessary.

Any modification to an order will require the event be re-submitted to the Catering office. The user will be notified via e-mail stating the Catering office is reviewing the order, and ultimately confirming the order.

Order within 48 hours of the event can not be changed online. You must contact Catering

by phone to make any changes.

## ORDERS

### Order Status:

- **In Progress** - orders that are currently being created by the user. By default, once the user begins filling an event or order, the event is automatically saved as “In Progress” until it is submitted.
- **Tentative** - orders that are waiting to be confirmed by the Catering office.
- **Confirmed** - orders that have been accepted by the Catering office and have not been fulfilled or flagged as “completed.”
- **Completed** - past orders that have been fulfilled.
- **Declined** - orders that have been declined or rejected.
- **Lost Business** - orders left “In Progress” passed the event date.

### Order History:

Your order history can be accessed in one of two ways:

1. **PURCHASERS REPORTS.** You can run reports to view details about any order you have placed. However orders can only be viewed and cannot be modified.
2. **VIEW YOUR EVENTS.** Selecting the **VIEW YOUR EVENTS** on the navigation tool bar, you can create a custom list of your orders based on the time frame that you have selected. Orders can be selected for modification using this search capability.

### Repeating an Order:

The user can repeat an order by selecting Option “2” on the Home Page. Option “2” displays the last three events, if the event you wish to repeat is not shown, click **VIEW YOUR EVENTS** on the navigation tool bar. **View Your Events** allows the user to search past orders. Once the event is identified click on **Repeat Event**, and then modify the new event information, add/delete menu items from the original order and **Check Out**.

## ESTIMATES

When orders are created in Food Venue the user is presented with the actual cost of the event. If a user is seeking a cost breakdown but not looking to place an order at that time, we suggest setting up a mock order for the sole purpose of obtaining pricing. The user would create a new event, name the event, complete the required event information and select items. Based on your selections, Food Venue, will provide a cost breakdown shown in My Order.

Once pricing is obtained the user should LOG OUT, located in the upper right corner of the navigation tool bar, prior to check out. This prevents your order from being submitted to the Catering office. The next time the user logs on, "Estimate" will be displayed as "In Progress" on the Home Page or in VIEW YOUR EVENTS which, the user can modify at the time of placing the actual order.

## REPORTS

### **Purchaser Reports:**

The user can access PURCHASER REPORTS located on the navigation tool bar. The Purchaser Reports allow the user to run reports on CUSTOMER ORDER SUMMARY, and CUSTOMER ORDER DETAIL. Select the report from the class/category you wish to execute and select next to configure the report criteria, sorting and output options and then click execute to run.

**Customer Order Summary** produces a report that displays the high level information for orders placed. The user can select from the following criteria to define the report: Event Date, Order Created Date, Order Status and Location. Each report can be sorted as desired.

- **Customer Order Detail** produces a report that displays the high level information for orders placed. The user can select from the following criteria to define the report: Event Date, Order Created Date, Order Status and Location. Each report can be sorted as desired.

All reports can be viewed differently using two different criteria, Style and Format. Each report can be viewed in three ways, within the browser (on screen), a test based window with only the formatted report (printer ready window) and to Excel (customer Excel).

### **Help:**

If you need help working in an order, the box in the top right hand corner is labeled HELP. The text of this box changes with every page. On many pages that box has a hyper link labeled "more" and will lead you to more in-depth help about what to do; or feel free to contact the Catering office at 802.656.7780.