MOM's Organic Market

Produce Managers Training Manual

2nd Edition. August 2012

New to this edition of the Produce Managers Training Manual

Welcome to the second edition of the Produce Training Manual. Some structural changes have been made in order to better guide you through the file.

Reduced Size

The documents in this guide have been edited down to just the essentials, making the Manual nearly 30 pages shorter than the previous edition. The information in the documents has been updated to reflect changes over the last year, so please read carefully.

Three Ways To Search

To navigate the Produce Managers Training Manual, you now have three options:

1. In the Table of Contents below, most chapter names and numbers, and section names can be clicked, which will allow you to navigate the document quickly.
2. Appendix A allows you to search the entire document using the Table of Contents from the previous edition of the Produce Managers Training Manual. Clicking any section in Appendix A will take you directly to that section of the Manual.
3. Appendix B allows you to search the entire document by topic. For example, if you want to find information about Rotation, you simply click on the work Rotation in Appendix B, and you will be taken to that section of the manual automatically.

You can also use the "Search" function of your PDF document reader by holding the control button [Crtl] and pressing the letter F.

New Information and Instructions

This edition of the Manual also contains several new pieces of information and instruction:

1. Information about AD items and Central Price Changes
2. Information about Local Totals and receiving Inventory Transfers from local deliveries
3. Instructions on how to receive Invoices with hand-written credits
4. Instructions on how to receive Invoices with Grocery items included
5. Wet Table and Dry Table cleaning procedures
6. Suggestions about maintaining your outdoor produce display

Please note that this document is intended for electronic viewing only. The Checklists and instructions are formatted for viewing in a PDF document reader, and may not print properly. If you need copies of any individual instructions in this guide, please contact Alvin Charity.

As always, if you encounter any problems with the instructions located within this document, please email Alvin Charity. If you need any other assistance, contact Chris Miller, Jason Caston, or Soren Huber.

Table Of Contents

Chapter 1 – Managing Staff

In this chapter, Produce Managers will find information for managing tasks related to the hourly Produce position, along with policies relating to Organic Certification, Rotating Produce, and Signage. Additionally, several checklists have been included to help hourly Produce staff stay on task while working at various times of day, and during slower times of year.

Checking For Organic Certification

Because MOM's only sells organic produce in the produce department, it is important that each and every produce employee check the products that she/he is putting in the department to make sure that it is organic. Some tips for how employees should be checking for organic compliance are listed below:

How MOM's guarantees that the produce we sell is organic:

First and foremost it is important to understand that MOM's does not debate with our customers the integrity of the National Organic Program, i.e. what it means to be USDA certified. However, we do guarantee that all fruits and vegetables sold in our produce department have been certified through the USDA certification process. While it would be nice for us to believe that everything we order from our wholesaler partners (Four Seasons, Alberts) will arrive to us as organic, we in fact cannot as previous experience has taught us.

As a result, we require every produce employee to personally inspect any item that they stock to assure that it is organic. This can be done a using a few different techniques:

With prepackaged items (berries, salads, carrots, mushrooms, sprouts, etc.)

- If the item is prepackaged, you should first look for the USDA organic label
- If no label appears then you should read the ingredients. All prepackaged items must be composed of at least 95% organic ingredients.

With loose items

- The fruit or vegetable should have a tie or sticker that says it is organic (whether it is actually on the fruit or not is not important -- for instance grapefruit often arrives to us with the stickers in the box but not on the fruit).
- The sticker of tie must have a 5-digit code that begins with a number 9. If any other number appears first, or if the code is only 4 digits, this item is not organic and must be returned.
- If no sticker or label appears on the product, check the box for a clear identification of the whether the item is organic or not.
- If no identification can be made then the product needs to be returned.

If a product does not clearly identify that it is organic then the product cannot be sold in our stores.

What needs to happen when a non-organic produce item is delivered?

1. If the Produce Manager or Assistant Manager is working, let them know a non-organic item was delivered. If the employee is working alone (or with another hourly employee), discuss the issue with a Store Manager (GM) or Assistant Store Manager (AGM).
2. The Produce Manager and/or Store Manager will contact a member of the Regional Produce team to let them know non-organic product was received.

For more information on USDA standards, regulations, and labeling procedures, please read the USDA Organic Certification page.

Rotating Wet and Dry Produce

Rotation is one of the most important was to preserve quality in the Produce department. The rotation of older backstock in the morning helps members of the produce staff determine which products need to be returned to the vendors immediately, thus saving time and avoiding future quality issues. Rotating throughout the day allows members of the staff to determine items that may only need 1/2 case credits. Below are instructions for morning backstock rotation and daily rotation procedures.

Note: Daily rotation procedures are most often completed while the store is open. The produce staff member who is performing wet or dry table rotation must rotate every item in the produce department at least once per shift. This means that if there is one person assigned to rotation in the morning and one in the evening, the products in the produce department will be rotated at least twice per day. Special focus should always be on slow moving items, soft fruit, tomatoes (loose and packaged), berries and grapes, packaged salads, loose spinach and spring mix, bell peppers, and easily damaged vegetables (squashes, eggplant, cucumbers).

Morning Backstock Rotation

Proper arrangement of the cooler and dry backstock area is extremely important for the following reasons: A) To assure the overall efficiency of the “setting up” process in the department, and B) to assure optimum quality control of all products in the department.

In order to execute the arrangement of the cooler and dry table backstock with the utmost efficiency in the morning, the following steps should be followed:

- **Step 1. Empty the produce cooler of all backstock products.** Generally, in the morning the produce cooler is full of items that were on display the day before. These items are normally being stored in the cooler in produce carts and produce buckets. They should be removed from the cooler and taken to the produce department area in the store. Also, in the cooler there is often a backstock of boxes/cases containing a number of products. It is always a good idea to take out (at least) one case of each item including: berries, grapes, bagged salads, sprouts, mushrooms, cucumbers, squashes, peppers, etc.

- **Step 2. Take the dry table backstock products from their designated areas to the produce department area.** Dry table products that will be used while stocking the dry table should be taken from their designated backstock areas and brought to the produce department floor. The physical location of the dry table backstock varies according to store location.

- **Step 3. Stock the produce cooler with refrigerated products.** Once the cooler has been emptied of all the backstock items that will be displayed on the produce tables, then the new backstock items can be placed in the cooler. When stocking the cooler it is important to remember consider the following tips:

    - **Tip 1.** Always rotate older boxes/cases with the new arrivals, for example if a new case of romaine lettuce arrives to the store and there is already a case of romaine in the cooler, the newer case should be put underneath the older one. This will help assure that the oldest products are on top of stacks in the cooler and are thus used first.

    - **Tip 2.** When stocking the cooler you should never put heavy case on top of cases that might be crushed by the weight of the heavier item. For example: a case of cabbage should never be placed on top of a box of chard.

    - **Tip 3.** Columns (stacks) of produce boxes should be as uniform in size as possible. This means that like sized boxes should be stacked on top of each other.

    - **Tip 4.** Large sized boxes should never be stacked on top of small-sized boxes; For example, lettuce boxes should never be placed on top of zucchini boxes, as this will cause toppling to occur in the cooler.

    - **Tip 5.** Some of the leafy vegetable (collards, kales, chards, radish with tops) and herbs (cilantro, parsley, and Italian parsley) come to us packed in ice. Often times the amount of ice is excessive and can harm the quality of the product if left on too long, as a result, the ice should be removed before putting the product in the cooler. One exception to this tip is broccoli. Broccoli is always packaged in ice and should be left on until prep.

    - **Tip 6.** Broccoli cases be stacked one of top of each other. The bottom case should always be placed in a plastic tote to avoid water leakage onto the cooler floor as the ice melts

    - **Tip 7.** All produce boxes/cases should be stocked with their description (name) facing outwards so that it is easy to locate items throughout the day.

Additional Note: A reminder regarding the importance of communication with the produce manager and/or the assistant produce manager. Before putting newly arrived products into the cooler it is important to first communicate with the produce manager or her/his assistant to find out what items they may need to be left out of the cooler for immediate prepping.

Rotation During Store Hours

Before rotating any product while the store is open, it is important to first fill any holes (empty baskets or open spaces on the wet and dry tables) and restock any baskets or spaces on the tables that are heavily depleted. This will more likely be the case after periods of increased traffic in the department, therefore it is important to make note of any typical "rush" periods throughout the day, stocking and rotating well before hand so customers have a a great selection of high-quality produce. Rotating before the rush (instead of during) will also allow customers easy access to all products in the department without having to avoid boxes, or carts placed directly in front of items they might wish to purchase. Additionally, this will allow the produce staff member to remain visible and answer any questions customers might have while still maintaining the department.

Regardless of the time of day, all rotation must be performed as follows:

Dry Table Rotation

- S**tep 1. Empty Baskets of older product.** Always have an extra box or basket to place these items in. Be sure to check quality on all older items to determine if they still meet MOMs quality standards. If they do not, they must be removed from the table at this time. Rotating product involves more than just stocking new product beneath older items - it is always important to remove all marginal product from the tables. Note: Never pull old product forward to fill the baskets with new product, always empty the baskets completely and place the product along the bottom of the basket in layers.

- **Step 2. Fill Baskets with new product.** Inspect the new product as it is coming out of the box, keeping track of the amount of poor quality items. If the case contains a large number of poor quality items, it is important to inform the Produce Manager or Assistant Manager immediately so they can contact the vendor. Checking quality on these items as they are being stocked will avoid quality issues in the future.

Remember that the old product must be placed on top of the new items, so be sure to leave enough space in the basket so the product appears abundant, but never overflowing. Customers should be able to pick the items they want from the basket without worrying about product falling on the floor. With easily damaged items, the baskets should never be filled more than 2 layers high.

- **Step 3. Refill Baskets with older product.** When refilling the baskets with older product, recheck each item for quality. Again, be sure to avoid filling the baskets too high.

Complete the 3 steps above as needed for the department. It is important to watch for easily damaged items, as those might need to be rotated much more frequently than others.

Important Note: Remember to rotate even when the baskets are full, and never assume a basket has been rotated simply because it is full. Often, one or two bad items that haven't been rotated out of a basket can case the other items in the basket to turn bad at a much higher rate than they would otherwise. Frequent rotation ensures that our products have a long shelf life, and customers will not purchase items that will decay before they are consumed.

Wet Table Rotation

Procedures for setting up and stocking wet items can be found in the "Setting Up Produce Displays" portion of the manual.

The steps for loose items on the wet table are the same steps 1 - 3 for dry table rotation. **Note:** When working on rotating wet table items, they must be kept cold at all times to preserve their quality. These items will begin to decay at a much higher rate if they are exposed to warm air and will result in higher shrink. If there are a number of items that need to be stocked or rotated, work with only a few cases at a time to ensure the cold chain is not broken. (Cold Chain is the process of keeping cold items under refrigeration at all times during their life span, from the field to our displays. Once the cold chain is broken, these items (especially berries) have a significantly lowered shelf life).

All Packaged Items must be inspected for Quality. On the wet tables, newer packaged products must be displayed behind older packages to ensure that the older packages are purchased first - this includes packages with dates (salads, broccoli product mixes, etc) and packages that do not have expiration dates (bagged carrots, deep root products, salad dressings, etc). When rotating, the entire display must be cleared before any new items are put up. Each older package that is taken down must be inspected for quality (see special inspection notes below). All new products must be inspected before they are place on the table, and any large amounts of bad product should be shown to the produce manager or assistant manager.

Special Inspection Notes:

Due to their highly perishable nature, or the difficulty in determining the quality of a product, some items require special attention when they are examined during rotation.

Berries must be examined multiple times throughout the day to ensure that the department never has any moldy, wrinkled, soft or oozing berries on the tables. These are all quality issues that negatively impact the impression of the produce department. If there are only a few bad berries in a package, remove only those berries, reserving the good product for combining with other packages. If there are multiple packages of berries that need to be combined, remove these from the table and take them to the back of the store to combine them. Never sort through packages of berries while customers are in the store (during store hours). If you are restocking berries at the time of rotation, place all new berries underneath the older packages.

All packaged salads must also be inspected for quality as well as the date. Any salad container that has decaying, yellow or wilting leaves must be removed from the department. Loose spinach and spring mix must also be examined for decay, yellowing and wilting. Since the loose salads are directly exposed to warm air, they will have a higher rate of decay than packaged salads, and must be inspected multiple times throughout the evening. Salads are always rotated according to date, with newer dates (dates that have a longer life) placed on the shelf behind the older dates (packages that will expire sooner). There should never be more than 2 differently dated packages on the table at any given time. If a situation arises where there are multiple salads with different dates, try to fill the display with 2 of the older dated packages if possible.

For more specific details about product quality, consult the Produce Manager, Assistant Produce Manager or a Store Manager.

Arranging Dry and Wet Table Backstock

One responsibility that all produce staff has, at one time or another is to arrange the produce cooler and dry table backstock. This is activity will be undertaken at various times throughout the day, but it will be done most thoroughly in the morning during the initial stocking activity. Proper arrangement of the cooler and dry backstock area is extremely important for the following reasons: A) To assure the overall efficiency of the "setting up" process in the department, and B) to assure optimum quality control of all products in the department.

In order to execute the arrangement of the cooler and dry table backstock with the utmost efficiency, the following steps should be followed:

- **Step 1. Empty the produce cooler of all backstock products.** Any wet produce left over from the previous evening will be stored in buckets in the produce cooler. These buckets should be taken to the sink for re-prep and soaking each morning.

  Additionally, any full or partial cases of cold table items should be removed from the cooler and taken to the produce department to be stocked. These items include peppers, mushrooms, packaged salads, bagged carrots, etc. These items must be used before any items from the current delivery are stocked.

- **Step 2. Take the dry table backstock products from their designated areas to the produce department area.** Dry table products that will be used while stocking the dry table should be taken from their designated backstock areas and brought to the produce department floor. The physical location of the dry table backstock varies according to store location.

- **Step 3. Stock the produce cooler with refrigerated products.** Once the cooler has been emptied of all the backstock items that will be displayed on the produce tables, then the new backstock items can be placed in the cooler. When stocking the cooler it is important to remember consider the following tips:

  - ***Tip 1. Always rotate older boxes/cases with the new arrivals***, for example if a new case of romaine lettuce arrives to the store and there is already a case of romaine in the cooler, the newer case should be put underneath the older one. This will help assure that the oldest products are on top of stacks in the cooler and are used first.

  - ***Tip 2. When stocking the cooler you should never put heavy case on top of cases that might be crushed by the weight of the heavier item.*** For example: a case of cabbage should never be placed on top of a box of chard.

  - ***Tip 3. Large sized boxes should never be stacked on top of small-sized boxes***; For example, lettuce boxes should never be placed on top of zucchini boxes, as this will cause toppling to occur in the cooler.

  - ***Tip 4. Remove heavy ice from products.*** Some of the leafy vegetable (collards, kales, chards, radish with tops) and herbs (cilantro, parsley, and Italian parsley) come to us packed in ice. Often times the amount of ice is excessive and can harm the quality of the product if left on too long, as a result, the ice should be removed before putting the product in the cooler. One exception to this tip is broccoli. Broccoli is always packaged in ice and should be left on until prep.

- ***Tip 5. Broccoli cases be stacked one of top of each other.*** The bottom case should always be placed in a plastic tote to avoid water leakage onto the cooler floor as the ice melts

- ***Tip 6. Store backstock so you can easily read the cases.*** All produce boxes/cases should be stocked with their description (name) facing outwards so that it is easy to locate items throughout the day.

Additional Note: Before putting newly arrived products into the cooler it is important to first communicate with the produce manager or her/his assistant to find out what items they may need to be left out of the cooler for immediate prepping.

Spraying Down Wet Produce

What is our policy about spraying down produce?

Not all vegetables get sprayed down. As a result, it is important to first learn which produce items get sprayed and which do not.

The following items are always sprayed down:

- Leafy Greens (Lettuces, Collards, Kales, Dandelion Greens, Chards, etc)
- Herbs - these may require a little less water since they are more delicate than leafy greens. Note: that if bunched herbs look wilted, it is best to remove them from the table to be soaked in the sinks rather than try to rehydrate them with the sprayer. If the herbs have not re-hydrated after a lengthy soaking (10-20 minutes), it is best to request credit or compost this product.
- Cabbages, Broccoli, Bunched and Loose Roots (Loose Roots often require more frequent spraying than other items, and can be sprayed separately if needed).
- Almost any item that comes packed in ice or is a normal part of the "wet area" of the cold table.

The following items are never sprayed:

- Loose Spring Mix/Loose Baby Spinach - spraying will cause the product to wilt and eventually decay at a much higher rate.
- "Top Rack" Items (Peppers, Cucumber, Eggplant, Zucchini, etc)
- Mushrooms - spraying will cause mushrooms to decay at a much higher rate

- Apples, Oranges, Stone Fruit, etc that may be kept on the cold table.
- Any item not in the "wet area" of the cold table.

Spraying Down guidelines:

- Spraying down produce is the responsibility of every employee.
- Consistent spraying (every 15 to 20 minutes) is important because it helps keep the produce hydrated and makes sure that we are keeping the displays looking fresh.
- Spraying down should not be done superficially. In other words, if you spray please make sure that all vegetables get a thorough soaking. This may require you to move items from the top of a larger display so that the product at the bottom receives the same amount of water as the product on top.
- Roots (beets, turnips, radishes, parsnips, rutabagas, etc) will need to be sprayed more often since they frequently soak up more water than other products on the wet table. A good way to tell if roots need to be sprayed is their appearance - if they look dry, spray them down. Keep in mind that they can be sprayed down separately, so if the rest of the table is still well hydrated, spraying just the roots is OK.

Important Note: When training a new employee, spraying down should be among the first routines established, and everyone on the produce staff should understand that they are required to spray down produce according to the instructions and guidelines above.

Signage Policies and Procedures

Having correct signage in the produce department is extremely important in showing our customers the high standards we have for our produce departments. Not having accurate signage (incorrect prices, origin, missing signs, etc.) is a major "black eye" to the produce department and MOM's as a whole.

Correct signage means that all signs must denote the correct:

- Variety of fruit and or vegetable;
- Origin of the item (list the country if non-local. If local, list the state).
- Price of the items,
- Whether the product is sold by the each (unit) or lb.

Moreover, signs must:

- be correctly spelled
- be free of smudges,
- not have watermarks (incorrectly laminated signs allow for water seep in and discolor the paper inside the laminating strips),

- have prices written using a black permanent marker - It is also okay to use the p touch machine to print prices
- be written legibly (in other words, no "chicken scratch"). Please allow only those with good penmanship to write on signs.
- Not have scratch outs (if the sign is made incorrectly - replace it).

When is it time to clean and/or make new signs?

When a sign looks bad it needs to be immediately changed, which means:

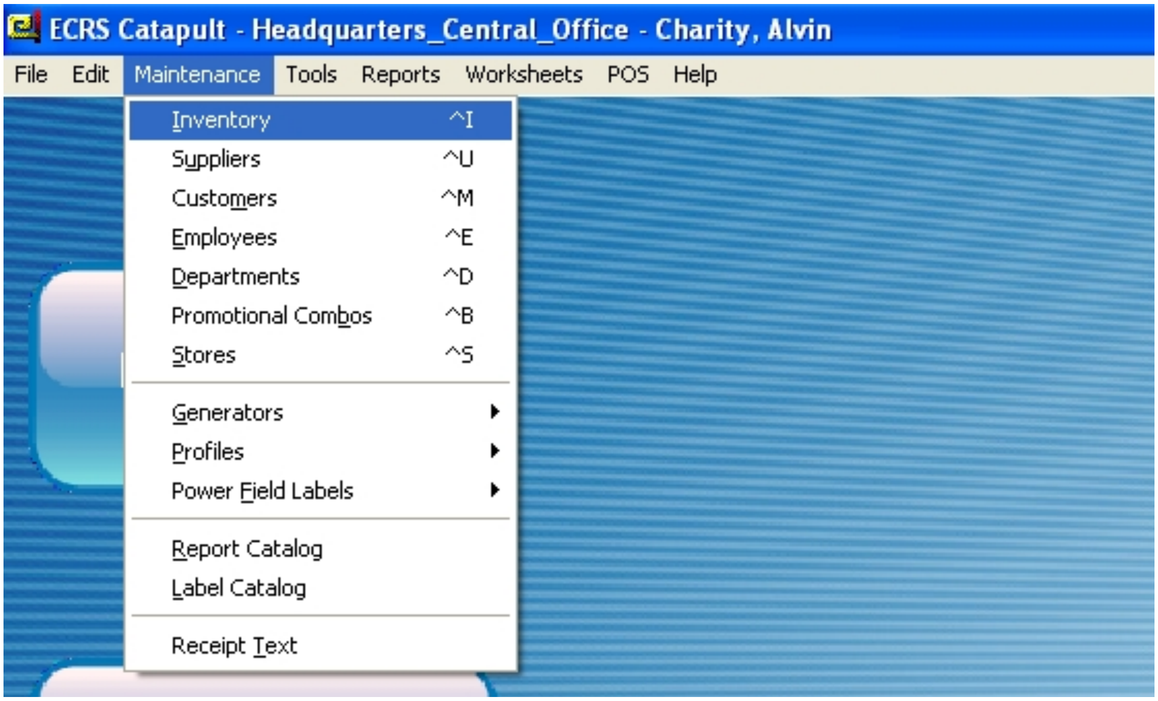
- Signs are cleaned when smudges appear. Finger nail polish remover from the Supplements/HBA department can be used for this purpose (Note: If Nail Polish Remover is removed from the Supplements/HBA department it always needs to be recorded as shrinkage for in-store use.), or Remarkable Ink Remover can be ordered from Huberts.
- Signs that have water seeping in to the signs in an undesirable way must be remade as soon the discoloration is noticed.
- Whenever signs are being cleaned it should be done away from the departments display areas. Many customers and fellow employees strongly detest and/or are allergic to the fumes of the nail polish remover that is used. Whenever, possible it is recommended that the cleaning takes place outdoors.

Note: If you need a copy of a sign template, please contact someone from the Regional Produce Support Team.

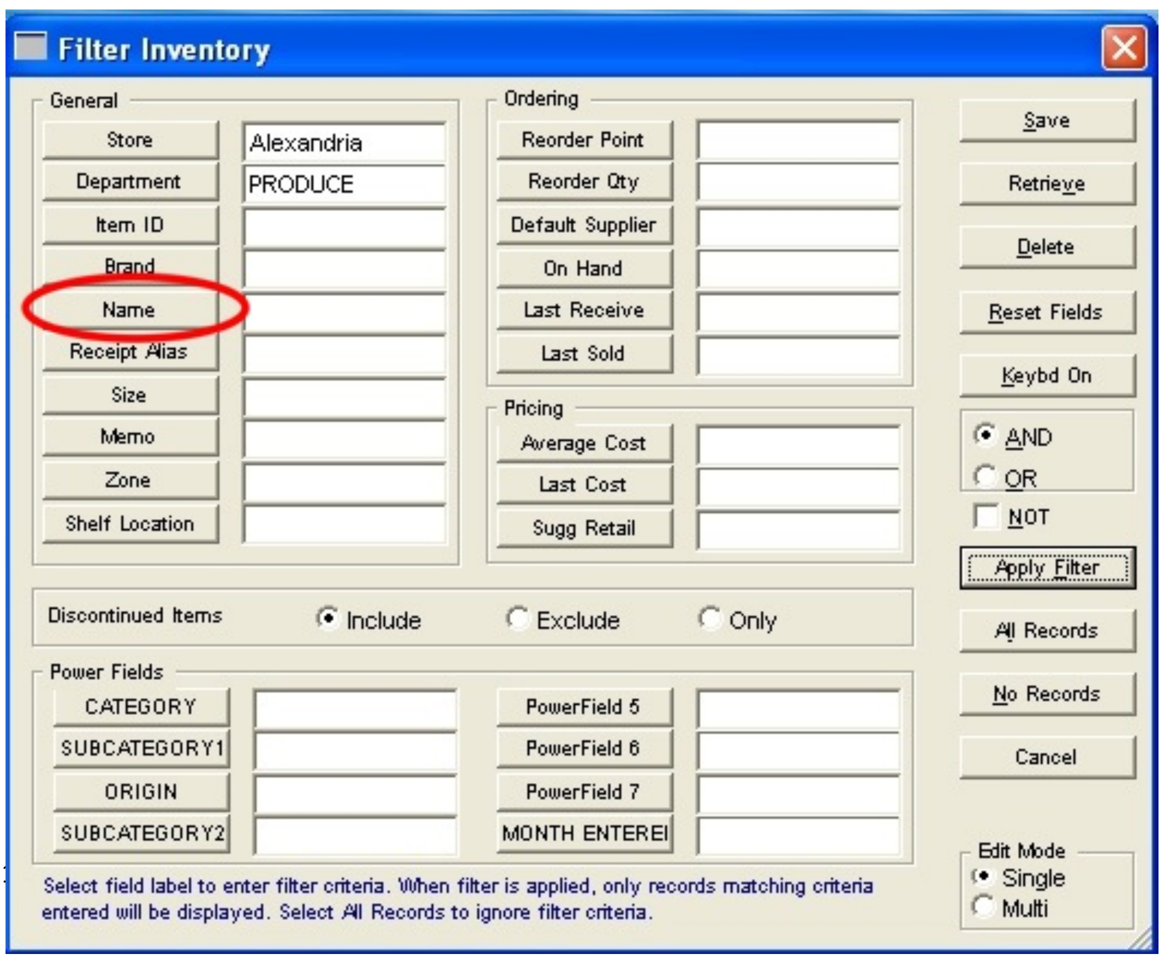
Looking Up Items and Prices in Catapult

Sometimes it is necessary for hourly employees to look up item plus or check prices in Catapult. This guide can serve as a reference for any employee who is working their first shifts alone and needs a reminder on the process of finding items in Catapult.

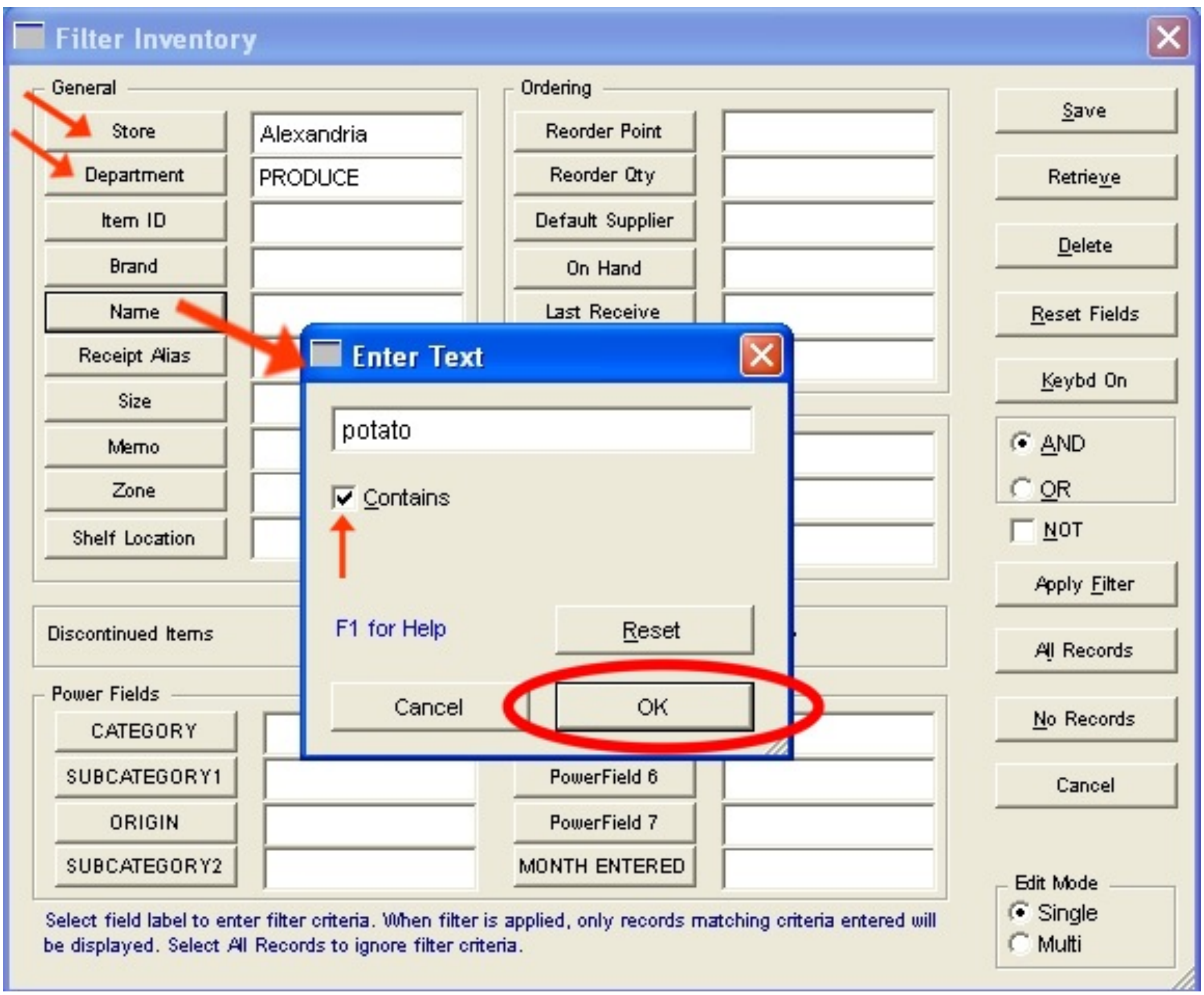
1. In Catapult, locate the menu bar at the top of the screen. On this menu, find the “Maintenance” selection. This will give you access to the produce items in Catapult.



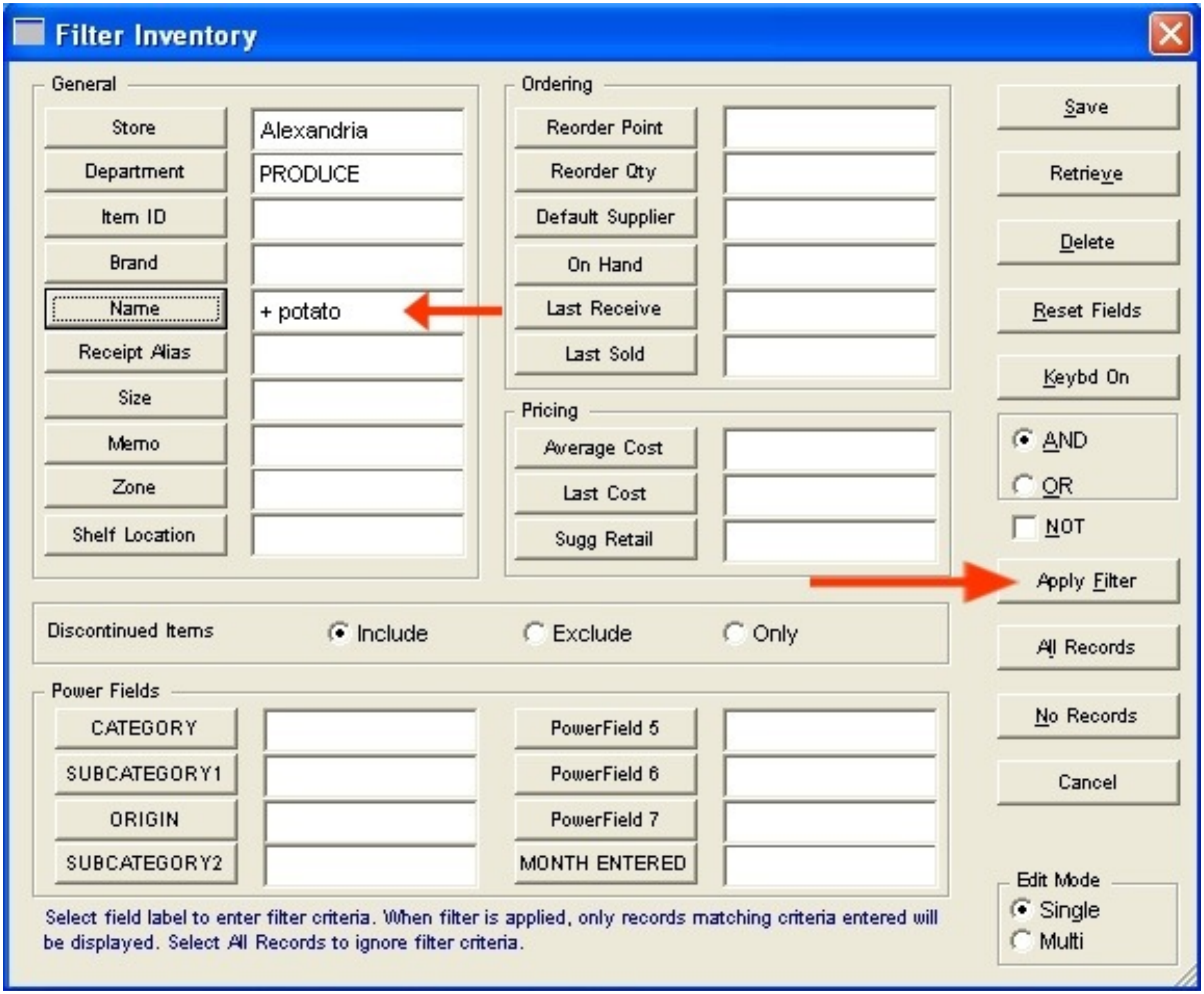
2. After clicking "Maintenance," a screen titled "Filter Inventory" will appear. On this screen you can enter the name of the item you wish to look up by clicking the "Name" button on the left side of the screen. Please note that:
   a. You must be sure the "Department" box contains the name of your department (Produce). If Produce is not selected, Catapult will include items from the Grocery and Wellness departments in your search.
   b. You must be sure that "Store," "Department" and "Name" are the only boxes that contain search information.



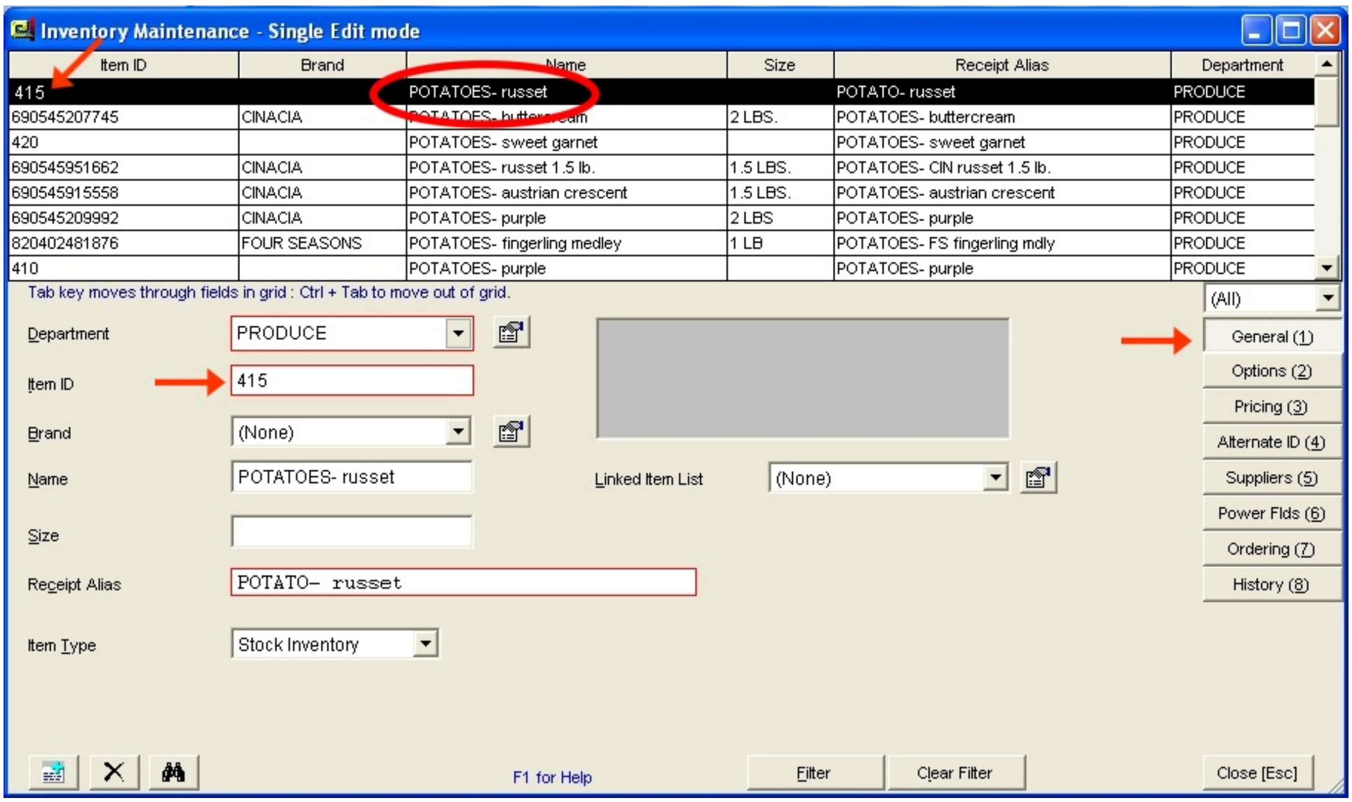
3. When you are certain the "Filter Inventory" screen contains the correct information, click the "Name" button.
4. A new screen will appear that allows you to type the name of the product you wish to search for. For the best search results:
    a. Enter the name of the item as simply as possible. For example, you can search for Russet Potatoes by typing "potato" into this text box.
    b. Be sure the "Contains" button is selected. This will allow you to search for any produce item that contains the word in the text box, which gives you a wider range of search results.
5. After you are finished entering information, click "OK" at the bottom right of this screen.



6. The “Name” box on the “Filter Inventory” screen should contain the text you typed.
7. To search for your item, click “Apply Filter” on the right side of the screen.



8. A new screen titled “Inventory Maintenance” will appear. This screen displays information about the Produce item you searched for.
    a. If there are a lot of results for the item you searched for, you may have to use the up and down arrows on the right side of the screen to search for the particular item you need.
    b. To select the item, click anywhere on the row of that item. The entire row will change from white to black when you have selected the item.
9. The PLU of the item you were searching for will be located in the boxes marked “Item ID.”

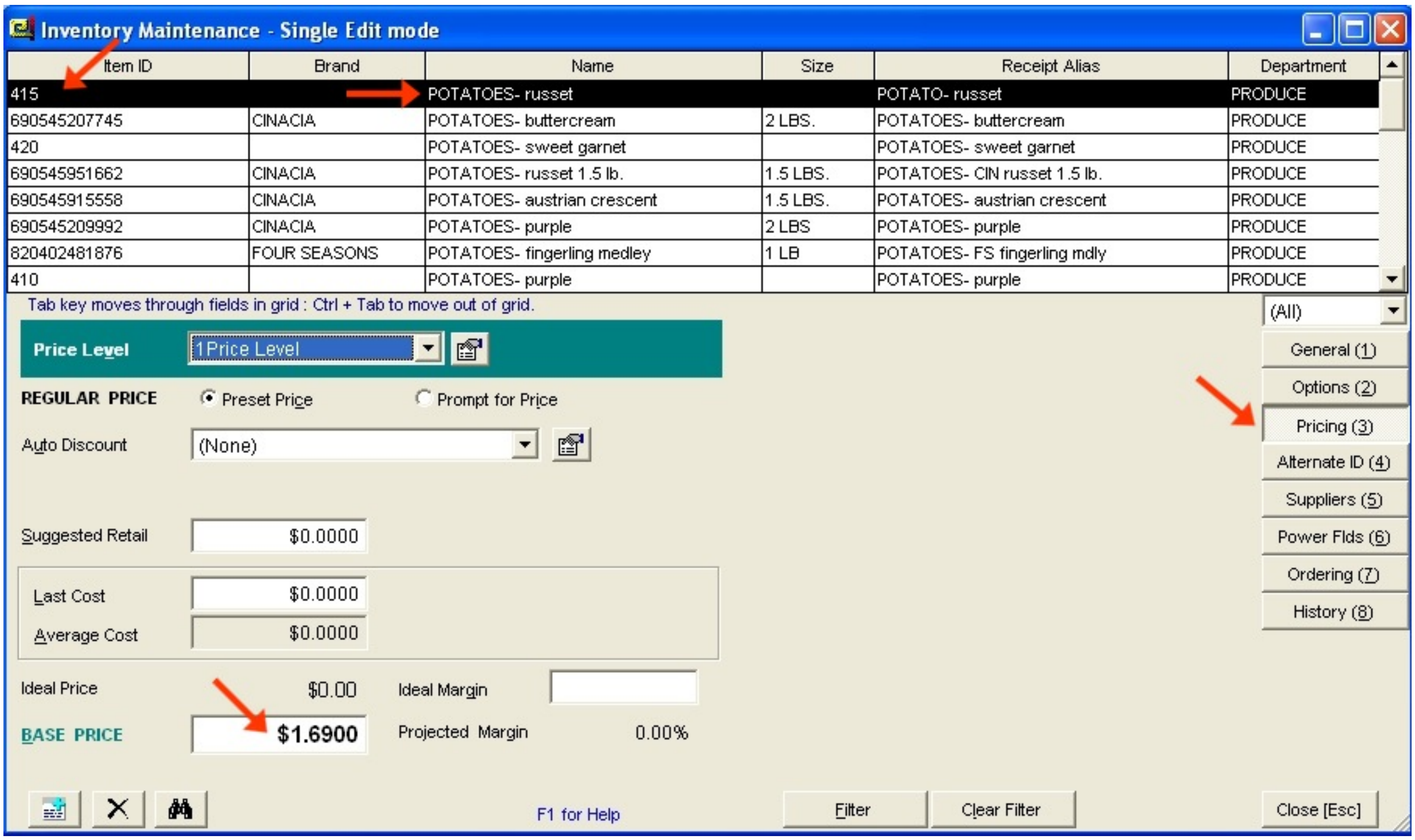


If you want to search for new items, or have made an error and want to start again, click the “**Filter**” button at the bottom of the “**Inventory Maintenance**” screen. This will return you to the “**Filter Inventory**” screen, where you can enter new information.

Looking Up Prices

If you are searching for the price of a particular item in Catapult, follow steps 1 through 8 above. After the “Inventory Maintenance” screen appears:

1. Locate the item you were searching for. If necessary, use the up and down arrows on the right side of the screen,
2. On the right side of the screen (below the up and down arrows) there are 8 buttons. Locate and select the button marked “Pricing (3).”
3. After clicking “Pricing,” the information on the lower left side of the screen will change. You will now see pricing for the item you have selected. This information is located in a text box marked “Base Price.”
4. “Base Price” is the current price of the item.



Checklists for Hourly Staff

Daily Produce Quality Check List

Wet Table	Initials YES	NO
All Items are well hydrated		
Products on table cover the entire table (no empty spaces)		
All display items (basket, tables, etc) are clean		
All bags are marked (small or large)		
Rotation: All items on the table have been rotated		
Salads not within 3 days of expiration		
Cucumbers: no shrived ends or bruises		
Zucchini: not wrinkled, soft		
Yellow Squash: not wrinkled, soft		
Eggplant: not wrinkled, soft, bruised, or light spots (age spots)		
Peppers: not soft, bruised, broken, wrinkled		
Mushrooms: good color, not slimy or dark brown		
Loose Salads: no wilting, yellowing, or decaying leaves		
Packaged Items: not within 3 days of expiration		
Sprouts: no decay, dry bottoms, no mold		
Packaged Herbs: not dried out, slimy, or brown leaves		
Bunched Herbs: good size, flat bottoms, not wilted, no yellow		
Carrots w/ tops: not browning, at least three stems on each		
Cabbage: no brown butts, pale, torn, leaves		
Lettuce: no brown butts, slime, brown or torn leaves		
Chards: no browning, clean cut butts, no torn leaves		
Scallions: not slimy, evenly cut tops		
Roots: well hydrated, not shriveled		
Berries: no mold, mushiness, or juicing in package		

	Dry Tables/Cold Table	Initials YES	Initials NO	
	Products on table cover the entire table (no empty spaces)			
	All display items (basket, tables, etc) are clean			
	All bags are marked (small or large)			
	Rotation: All items on the table were rotated.			
	Apples: no bruising, knicks on skin, stem holes			
	Coconuts: no mold around eyes, liquid inside			
	Pineapples: leaves are not dried out, brown			
	Pears: no bruises, overripe, or punctured skin			
	Banana: face up, no dark spotting			
	Citrus: no mold, not too soft			
	Potatoes: not soft, green, or sprouting			
	Sweet Potatoes: no soft spots, mushy end, black eyes			
	Tomatoes: not soft, oozing, no fruit flies			
	Avocados: not overly soft/over ripe			
	Onions: no sprouting, no slimy skins			
	Garlic: no sprouting, no soft and/or dried out bulbs			
	Shallots: no sprouting, no slimy skins			
	Hard Squash: no decay, bruises or soft spots			
	Ginger: no shriveled items or small broken pieces			
	Stone Fruit: not overly soft, no juicing, mold, fruit flies			
	Seasonal Display: Swept, rotated, organized, well stocked			
	Delicate products properly stocked (no over stacking)	**Initials YES**	**Initials NO**	
	Tomatoes			
	Kiwi			
	Pears			
	Stone Fruit (peaches, plums, nectarines, etc.)			
	Avocado			

Evening Checklists

In the evening, MOM's produce staff tends to work a great deal by themselves, without the produce manager and/or assistant produce manager being present. Furthermore, the evening produce positions are often times filled by a new hire that do not have a great deal of experience working with produce. As a result, these staff members' individuals tend to need a bit more guidance in the daily completion of their responsibilities. The checklist below has been created to assist evening produce staff with their required tasks.

Please note: This checklist should be used as a starting point for the produce manager to develop a checklist to suit the needs of their store. In no way should the list below be viewed as exhaustive: the Produce Manager or Assistant Produce Manager can add other tasks to this list at any time, and all times can be adjusted.

Daily Closing Checklist - Produce

Responsibility	Time of Day	Time it Takes	Initials
Preparing the Department			
Walk the department – thoroughly spray down, check signs, and face items	3:30	30 minutes	
Fill all of the holes and prep necessary product	4:00	One hour	
Restock all items	5:00	2-3 hours	
Preparing to Close			
Sweep and mop the back area	7:30	15 minutes	
Sweep and mop the walk-in cooler	7:45	15 minutes	
Clean out the bins	8:00	15 minutes	
Clean out the sink	8:15	5 minutes	
Closing the Department			
Thoroughly spray the wet table	8:45	10 minutes	
Breakdown the wet table and place the products into the bins (spray product before topping) – including watercress	9:00	15 minutes	
Put the bins into the cooler	9:15	10 minutes	
Clean the debris from the wet table	9:25	5 minutes	
Cover the mushrooms and potatoes and bag the green beans	9:30	5 minutes	
Remove the recycling, trash, and compost	9:35	10 minutes	
Leave signs on the desk	9:45	15 minutes	
Turn off the lights for the cooler and clock out			

Adjustments/Comments:

Produce Department Slow Day Task List

Even in busy Produce Departments, there are slow days, and these are a great chance to catch up on general cleaning and maintenance you might not be able to take care of on a regular basis. In order to prioritize those tasks, a Slow Day list has been created.

Below is a sample Slow Day list. Produce Mangers are encouraged to modify this list, or create their own to suit the needs of their store.

Once a month

- Clean out the produce side of the walk-in cooler and mop the floor.
- Go through all signs on the tables and in the office area, pull out bad ones, and make new ones.

Once a week

- Mop the silver grate under the wet table.
- Clean the silver bar in the middle of the dry table/ Clean the drawer and metal framing on Euro tables.
- Scrub all the produce totes with soap.
- Organize the display and prop shelf. (Look for props on top of the wet table and other strange places).

Every day

- Wash the produce sink with soap.
- Clean the gray plastic rims of the wet and dry tables (take off stickers).
- Organize all backstock (make sure labels are facing out and all like items are together, oldest at the top of the stack.)
- Clean the office area.
- Be sure all pallets, produce waste and other miscellaneous produce items are cleared from produce delivery areas.

Quarterly (When store is not open but before a day that is going to be busy)

- Power wash the refrigerated table
- Scrub refrigerated table racks
- Change foam liner on the refrigerated table

Links to Human Resources Information

Click any link below to view information about that topic

- **Produce Department Job Descriptions**
  View descriptions of typical produce department positions

- **Using IApplicants.com**
  Learn to create, manage, and delete job postings on iapplicants.com

- **Tools for the Interview process**
  Hourly interview checklists and guides, Top-grading checklist and guides

- **Produce Check Ins**
  Produce employee check-in forms

- **Employee PAN Forms – Employee Warning forms, Termination forms and Checklist**
  Documents relating to corrective action, termination, and employee information changes

- **Vacation Requests**
  Forms to use when submitting a vacation request

Chapter 2 – Managing Purchases

In this chapter, Produce managers will find information related to managing daily purchases, including basic Vendor Contact information, how to request and submit new products, and how to update items that are already in Catapult.

There are also detailed instructions on how to receive invoices into Catapult and check receiving in each Produce department to catch potential errors. Several checklists are included in this portion to guide Produce Managers through the process for the first time, or as a review.

Next, there is information detailing the process of creating both the Inventory Transfer and Inventory Adjustment Worksheets, and when to use each. There is also a brief discussion of the Vendor Usage report, where Produce Managers can find purchases for their store broken down by vendor.

Lastly, Produce Managers will find instructions on how to complete the Inventory process, along with a checklist to guide them through.

Vendor Information

Vendor Contact Information

Alberts Organics

1 800 899 5944

Salesperson: Josh Kay
jkay@albertsorganics.com
1 800 899 5944 x63389

Order Deadline: 12 pm (Noon) Monday-Friday, 10am Sunday (for Monday delivery)

Delivery Days: Monday-Saturday, No Sunday Delivery
For Monday delivery, the following extensions are routinely checked: 63667, 63254, 63250, 63232

Transportation For Transportation Issues (late delivery, no delivery, wrong items delivered) call:
Bob Butler x63119 - Call first
Lou Carter x63110 - Call second
Russell Kean x63122 - Transportation Manager

Four Seasons Produce

fsproduce.com
1 800 899 5944

Salesperson: Eric Pottiger
ericp@fsproduce.com
717 721 2739

Order Deadline: 2pm Monday-Friday (add on items until 3 pm), 10 am Saturday and Sunday (for Sunday and Monday delivery)

Delivery Days: Daily (Monday-Sunday)

Other Information: The Four Seasons website is used to place orders, with add on items called in/emailed to Eric.
Dennis (dennism@fsproduce.com) will also contact stores about orders.
For other general quality, credit, pallet packing issues (etc), contact Brian Dey: briand@fsproduce.com or 717-629-1808

Transportation For Transportation issues, call: 1 800 422 8384

Class Produce

410 799 5700

Salesperson: Tracy or Tina
410 799 5700

Order Deadline: 11pm for next day delivery

Delivery Days: Monday-Saturday, No Sunday Delivery

Other Information: Mushrooms need to be ordered by 2 PM the day before
Some items, like Chesapeake, need to be ordered a little in advance if you want a lot/certain delivery.
10 case minimum (watermelon bin counts as a full pallet)
Under 25 cases, fuel charge of $5

Transportation: For Transportation issues, call 410 888 9175. You will need to ask for "CFC" or "Transportation Department"
They tend to deliver on the late side, so please contact Tracy or Tina to adjust delivery times if possible.

Coastal Sunbelt

301 617 4357

Salesperson: Lisa Chertok
301 317 4357
LChertok@coastalsunbelt.com

Order Deadline:

Delivery Days: Daily (Monday-Sunday)

Other Information: If Lisa is not specific about each item you are ordering. Coastal Sunbelt deals primarily with Non-Organic product, so to
be sure we receive only Organic, you must specify that you wish to order Organic produce only

Tuscarora Organic Growers (TOG)

814 448 2173

Salesperson: Jeff Taylor
814 448 2173
jeff@tog.coop

Order Deadline: 11am Mondays and Wednesdays

Delivery Days: Tuesdays and Thursdays

Other Information: Orders can be called in or emailed to Jeff by the deadline.
Tim or Reina will often call prior to the deadline to take orders.
For Transportation issues, call: 814 448 2173. Keep in mind that TOG is a small cooperative
and their delivery times may vary.

Lancaster Farm Fresh Cooperative

717 656 3533

Salesperson:
717 656 3533
orders@lancasterfarmfresh.com
andrew@lancasterfarmfresh.com

Order Deadline: 11am Wednesday for Saturday delivery, 6pm Saturday for Wednesday delivery

Delivery Days: Wednesday and Saturday

Other Information: Orders can be called in or emailed by the deadlines listed above.
For Transportation issues, call 717 656 3533

Requesting Credits and Returns from Vendors

Before attempting to contact any vendor about credits or returns:

1. **Determine which vendor the item came from.** Find the invoice from that vendor. Be sure the invoice is for the correct item you need Credit for or Return.
2. **Look for the invoice number and date.** You will need to give the invoice number and the date to the Vendor in order for them to process the Credit or Return.
3. **Items can only be returned if their original case is intact.** If an item is missing its original case, there is a chance that this item cannot be returned or we will not be issued credit. Checking the quality on product before or during stocking will help eliminate this issue.
4. **Never attempt to return any product that has already been stocked.** Once it has been put on display, it cannot be returned.
5. **Never attempt to return any product in a different case.** E.G. Do not return Fennel using a case that originally contained Parsley. If the original case is not intact, please contact the vendor for possible options.

> Our Vendors have a relationship with MOMs based on trust – they rely on us to only send legitimate returns back to them. Once the product is stocked, it is ours. This means if bad product has been stocked in your department, you must compost it. Do not attempt to contact any vendor for returns once product has been placed on our tables.

Calling in Credits and Returns

Four Seasons:

1. We can return Full cases to Four Seasons by using the Green Sheet that is attached to every invoice that comes in to us. If you are sending anything less than a full case, contact Brian Dey (717 629 1808 or briand@fsproduce.com) to be sure he knows and will help if there are any issues receiving credit for these items.
2. Using the invoice, find the date the item came in. Next, find the green sheet that matches the date of the invoice.
3. On the green sheet, find the item you need to return.
4. In the column marked **"Qty. Returned"** there are two sections: **"Piece"** and **"Case."** Only using the **"Case"** column, write how much of the item you need to return.

   For example: if you need to return ½ case of Collards, you would find the line for the Collard Greens and under the column marked "**Qty. Returned,"** write ½ in the **"Case"** column.
5. The column to the right of the **"Qty. Returned"** column, there is a column marked **"Ret. Code."** These are codes Four Seasons uses to determine why we returned an item. At the bottom of each Green Sheet, there are **"Return Code Descriptions."** Most of the returns we request will be because of quality issues. The code for Quality is 1.
6. If an item needs to be returned but does not have any quality issues (the item was a misshipment, the item was not ordered but arrived with the delivery, accidental over ordering, etc), make sure to enter the correct code in the "Ret. Code" column on the green sheet.
7. Write the proper Return Code in the column marked "Ret. Code."

8. Attach the green sheet to the Item that needs to be returned. It also might be helpful to place a note on all Four Seasons returns with a list of items to be returned so the driver is aware of all items and can check the items on the note against their green sheet.
9. If you have any questions, contact Eric: 888-237-1964 or Brian: 717 629 1808

Alberts:

1. We cannot return anything less than a full case to Alberts. All partial cases must be called in as credits. Our sales person will let us know if they will accept the item for credit.
2. For Credits or Returns, call Josh (1 800 899 5944, extension 63389). He will need to know the following
    - **a.** The Invoice Number and Date
    - **b.** Which Item you need credit for, or need to return (full cases only)
    - **c.** Why you need the credit or return on that item
    - **d.** If you need credit, how much of the item you need credit for.
    - **e.** Mark all Alberts returns with a note that says “Alberts Returns” and place them in the return area. If there is more than one case that needs to be returned, it is helpful to list all items on the note.

All Other Vendors:

1. For Credits and Returns from **Class**, call Tracy at 410 799 5700. She will need to know the name of item and the invoice number.
2. For Credits and Returns from **Tuscarora**, call Jeff at 814 448 2173. He will need the name of the Grower and the Lot number (this is a 3 digit number) from the Item you need credit for, or to return.
3. For Credits and Returns from **Lancaster Co-op**, call 717 656 3533. They will need the name of the item you are requesting credit on, as well as a grower name and/or lot number.
4. For Credits and Returns from **Coastal Sunbelt**, call Lisa at 301 617 4357. She will need the name of the item and the invoice number.
5. If you are buying from a local farmer, you must contact them directly for credits or returns.

Produce Managers and Assistant Managers can reject any item at the time of delivery due to quality issues from any vendor. This must be done before the invoice is signed. The delivery driver is responsible for noting the return on the invoice and/or writing a Return Authorization (Alberts), Credit Memo (Lancaster Foods), or crediting the invoice for the product on the spot (Tuscarora, Lancaster Co-op). The salesperson will send a credit memo for the rejected items (with the exception of local vendors), but it may be helpful for the produce manager or assistant manager to contact the vendor as soon as possible the same morning the product is rejected.

Every Vendor needs to know why we need credit or return. Give them as much information as possible – for example: if you need ½ case credit on Collard Greens, tell them why you could only use half of the case (“yellow leaves in the bunches that had to be thrown away”, “broken leaves that had to be thrown away”, “small bunches that had to be combined to make regular sized bunches”, etc).

Giving the Vendors this information will help them understand our quality standards and hopefully prevent them from sending anything in the future that does not meet those standards.

Bringing In New Products

Produce Managers (and Assistants) must check with the Produce Director before any new packaged products can be brought into a store. This pertains to both older packaged items that have never been sold in your store before and/or items that our brand new to a vendor.

The reason that new products cannot be brought in without approval is two-fold:

1. New products must have the ingredients verified and we also need to determine if the grocery department already sells a similar product (caramel sauce, packaged nuts are two examples of such a product)
2. New products must have a PLU assigned to it in Catapult before it is sold in your department (Note: this is true for all packaged items).

> **NOTE:** All new product request s should be sent to Regional Produce support staff through the "Submitting New Items into Catapult" Form. (Clicking this link will take you to the Form).
>
> **PLEASE REMEMBER to submit items through this form when you order them**, and not when they arrive at your store. This will allow the item to be updated and ready for sale immediately after arrival, instead of storing the item in your backstock while it awaits approval.

Updating Items that are Already in Catapult

Products that are already in Catapult, but arrive with a different UPC

Occasionally, a new bar code is put on an item that we already carry in our department. This typically happens when brands switch growing regions, and need a new UPC to identify the change. An example would be a 5 oz. Earthbound Spinach Salad in the clamshell that has a new code but it is product that we always carry. Unlike the process with bringing in brand new items, you do not need to contact the Produce Director before bringing them in, since the item had been approved at an earlier time. However, it is important that the new UPC is submitted through the form (see NOTE below), so that the item can be updated and sold in your department.

It is also important to note that an invoice will sometimes not import if the vendor item ID associated with it is wrong. To fix this issue, you will need to send all information about the item (which item was imported, what item came up instead of the item you imported, which vendor the item was purchased from, etc) through the form.

> **NOTE**: All new bar codes/SKUs/UPCs must be sent to Regional Produce support staff through the "Catapult Item Issues" Form (Clicking this link will take you to the Form). Please remember to submit new bar codes/SKUs/UPCs through this form as soon as they arrive in your store.

Policy for Paying Small Local Farmers

MOMS Policy on Paying Small Local Farmers is that they must be paid immediately upon delivery of product. This will involve coordination with the Store Manager so that there is a check prepared and waiting for the farmer/delivery person when they bring your order to the store.

While the current Local Produce program at MOMs eliminates the stores need to deal with individual farmers, there may be times when an approved farmer is only able to deliver to a few stores directly. In these cases, it is important to be aware of the tips below, so the transaction between the store and the farmer is as smooth as possible.

Please keep in mind:

- **It is extremely important to prepare a check for the farmer in advance** so they are not waiting for someone to write it after they deliver items to the store. Paying as quickly as possible helps facilitate a positive relationship between MOMs and Small growers.
- **This policy does not apply to TOG or Lancaster Farm Fresh Growers.** These vendors already have accounts set up with MOMs and do not need to be paid immediately.
- **The Small Local Farmers that are delivering to your store must provide a physical invoice for your purchase.** This invoice is how the payment will be reconciled with the accounting department on a Period-by-Period basis.
- **Be sure to enter all invoices from Small Local Farmers into catapult the same way as any other vendors invoice**. If you can't find the Farmer in Catapult, please contact Alvin and Evy for assistance.

Receiving Invoices Manually and Importing Invoices into Catapult

Receiving invoices is one of the most important back-end tasks assigned to the Produce Manager, and must be completed on a daily basis. The totals from each invoice relate directly to several key components to the continued success of the Produce Department at MOMs:

- When invoices are received daily, Produce Managers can use Catapult as an accurate assessment of their margin, sales, purchases, and on-hand totals, and can reference these numbers with confidence on a regular basis.
- Our Accounting department relies on invoices that are received into Catapult to pay our vendors. Receiving Invoices on time and on a daily basis means that are vendors are paid the full amount we owe them when our bill is due.
- When invoices are received by using this instruction guide and checklist, the Produce department is more efficient- mistakes made when entering invoices require additional time and effort to fix, not only on the part of the Produce manager, but also our Accounting department. Mistakes not only waste your time, but other peoples time as well.

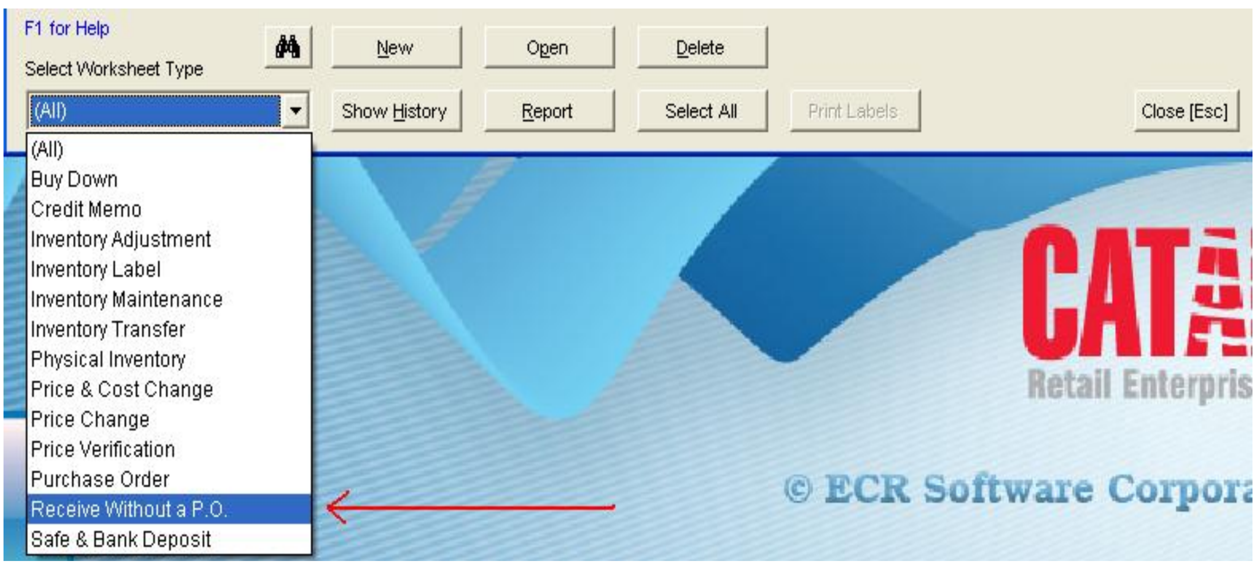
- Invoices are somewhat time-consuming, but it is important to create a schedule that allows for plenty of time to receive without distraction, or the need to rush. If you constantly feel distracted, rushed, or understaffed, please contact Chris, Jason, or Soren for additional support.

The steps for receiving invoices electronically begin in exactly the same way as the steps for receiving invoices manually. To receive invoices into catapult you must:

1. Open and log in to Catapult.

2. Find the **Worksheets** tab at the top of the program window. Click this tab, and then click **Worksheet Editor** to start a new worksheet**.**

3. In the bottom left of the worksheet editor there will be a box that says **(All)**. Click on the down arrow, and choose the very last item on the list, "**Receive Without a P.O.**" This is the type of worksheet you want to create.



4. Once you do this, click on the "**New**" button. A box will appear and you will have to enter a name for your worksheet. You want to be able to find your worksheet again in Catapult if needed, so you need to be sure the worksheet name includes the vendor's name, the invoice number, and the date on the invoice. Obviously, this differentiates invoices from one another so they can be found in Catapult.

Use the following format:

(your store)(**vendor name**)(**invoice number**)(**Invoice date**)

(ex.: cppro **ALB** **e005-06068** **052810**)

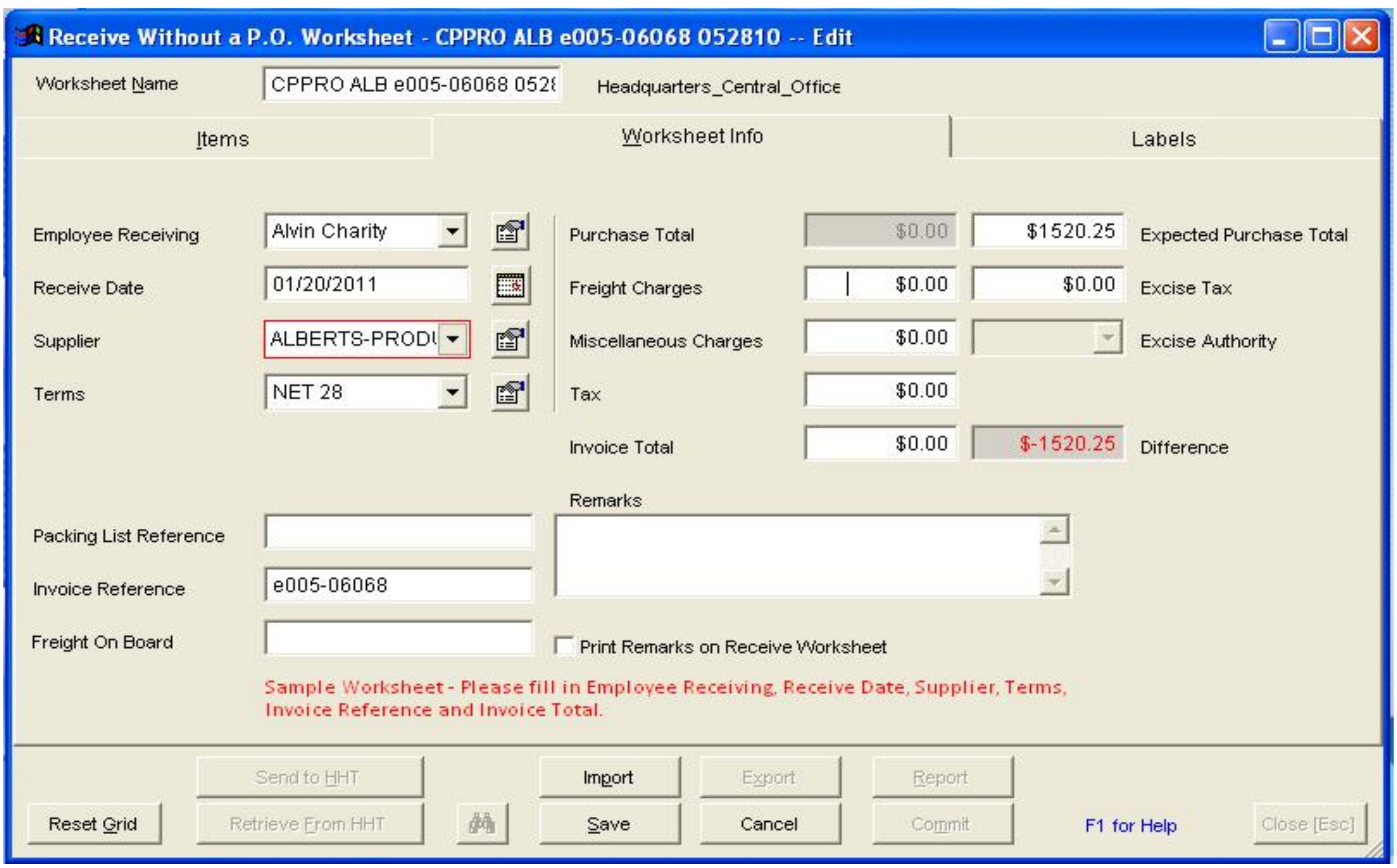
Always use the full invoice number as it appears on the invoice. Always type the date in MMDDYYY format. (ex. July 1st, 2012 = 070112)

5. After you enter the vendor name and invoice information, click “**Save.**”

6. A box will appear and you will be prompted to enter various items. It’s easiest to use the “tab” button on the keyboard to move from item to item.

- In “**Employee Receiving**”, scroll down until you find your name.
- In “**Receive Date**”, enter the current date. **Be sure to put the date you are entering the invoice, not the date on the invoice itself** (the date on the invoice always goes into the worksheet name).
- In “**Supplier**”, scroll down until you find the correct vendor for the invoice you are working on. Always make sure you select the correct vendor for the invoice you are entering.
- In “**Terms**”, enter the payment terms stated on the invoice (These can usually be found at the top of the invoice, and will say something similar to “Net 30,” “Net 15,” etc)
- In “**Invoice Reference**” enter the invoice number.
- In “**Purchase Total**”, enter the invoice total.

7. Click the “**Save**” button in the bottom center of the page. Catapult crashes and freezes all the time, so it’s good to save periodically.



8. Up until now, you have been working in "**Worksheet Info**." Click on the "**Items**" tab at the top of the page. This is where you are going to add the individual items on the invoice. Just beneath the "Worksheet Info" Tab, there are three buttons marked "Pkg," "Unit" and "Tot". You always want to receive items the "**Tot**" button pressed.

Up to this point, the steps for receiving invoices electronically have been the same as receiving them manually. Currently, Produce is only able to receive Alberts and Four Seasons Invoices electronically. Instructions for receiving invoice electronically are located further in the guide.

Instructions for Receiving Invoices Manually

Adding Items to the Worksheet

There are a few different ways to add an item.

- The easiest and most accurate (and preferred) way is to use the item's PLU, which you can find by using the "Inventory" under the "Maintenance" tab. On packaged Items that do not have a PLU (Clamshell Salads, Dressings, Croutons, Bottled Volcano Juice, etc) will need to be entered using the UPC that is on the package or in Catapult. You can search for a UPC in catapult using the same search method as you would when searching for an item PLU.
- Some UPC codes are listed on the physical copy of the invoice. In these cases, it may be faster to type the UPC straight from the invoice rather than searching for the item in catapult.
- Another way to enter an item us to use the item ID/code/number listed on the invoice. A fair amount of product ID's from Alberts and Four Seasons are in Catapult, but this method is generally slower than using the PLU codes. Additionally, only Alberts and Four Seasons product ID's are in Catapult, so using codes listed on other vendors invoices (Coastal Sunbelt, Lancaster) would not work.
- The final way to enter an item is to use the "**Add Item**" function. If you don't have the UPC/PLU, can't find the number, and no item codes/numbers/etc. from the invoice work, click on this button to search for the product in Catapult. From here out, this

works just like searching for things in Catapult like you already know how to do. When you find the correct item in Catapult, click the "Add to Worksheet" button.

- If you cannot find an item using any of the methods listed above, use the "Submitting New Items" Form to send the information to Regional Produce support staff. In most cases, The items will be available the following day.

You may need to double-click in the "ID Add" box to make sure the blinking cursor in that box (and so that you do not accidentally enter item IDs on the wrong line).

Repeat this process for every item listed on the invoice you are receiving.

To delete an item from the worksheet, click the "**Remove Item**" button that is located top right next to the "Add Item" button.

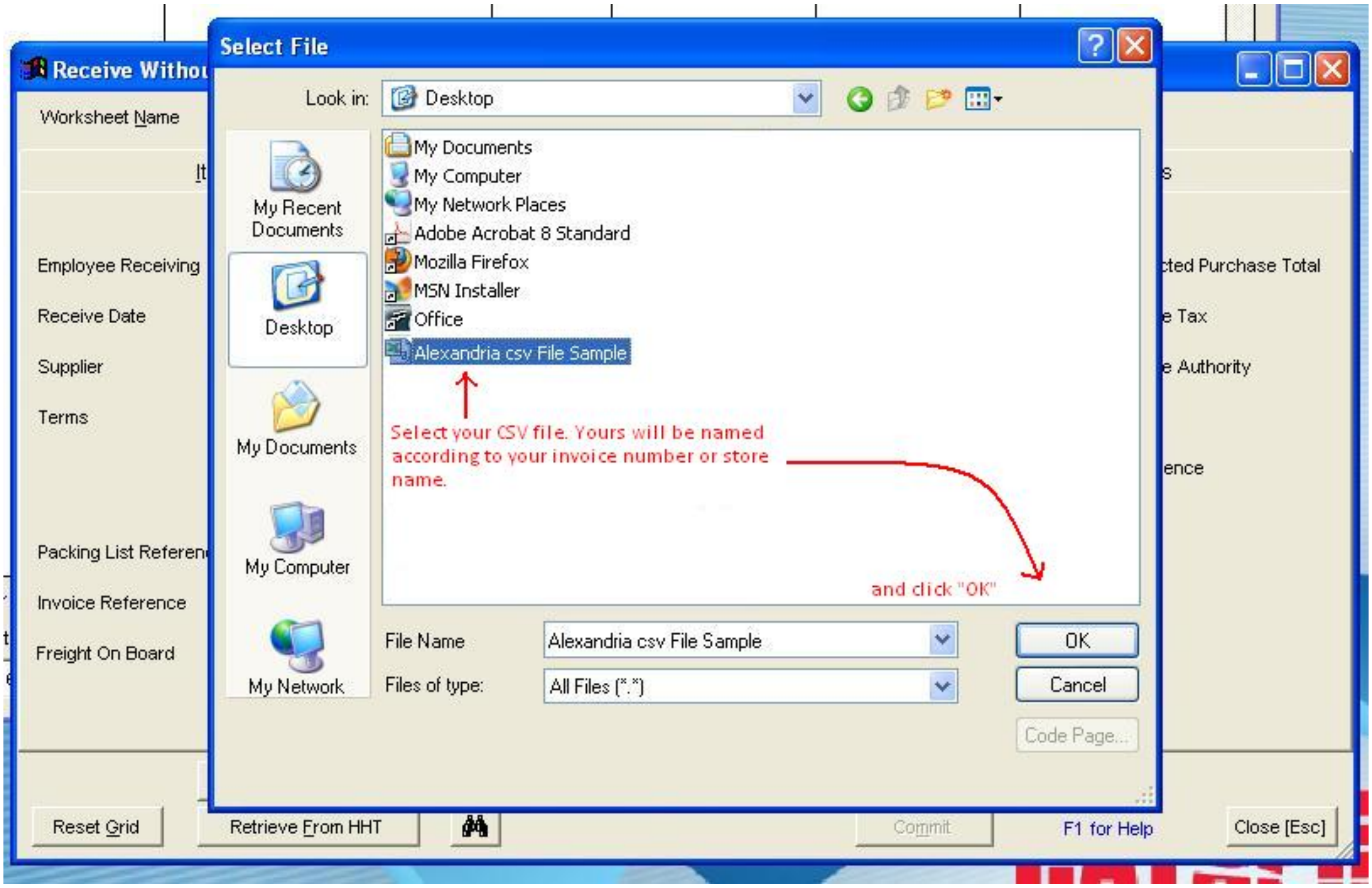
These next set of instructions will detail how to upload Four Seasons and Albert's CSV invoices into catapult.

*__A Note on CSV files:__ The CSV file will be sent out by Four Seasons or Albert's prior to the arrival of your delivery each morning. This file is simply an electronic copy of your invoice formatted so that catapult can process all invoice information in a short period of time, and contains the same basic data as the physical invoice. However, the **Produce Managers must adjust the case quantities and total cost for all items uploaded via CSV file.** Additionally, tems from the CSV file may fail to upload, and catapult will provide a list of these items in a text file that will be saved automatically to the computer. Produce Managers must locate this file and enter all items manually; otherwise they will not be added to your inventory.

Receiving Invoices Electronically:

1. In the "Items" tab of the Receive without a PO worksheet, locate the "Import" button at the bottom of the screen.

When you click this button, a screen will appear, allowing you to locate the CSV file that you received from the vendor. Select this file and click OK.

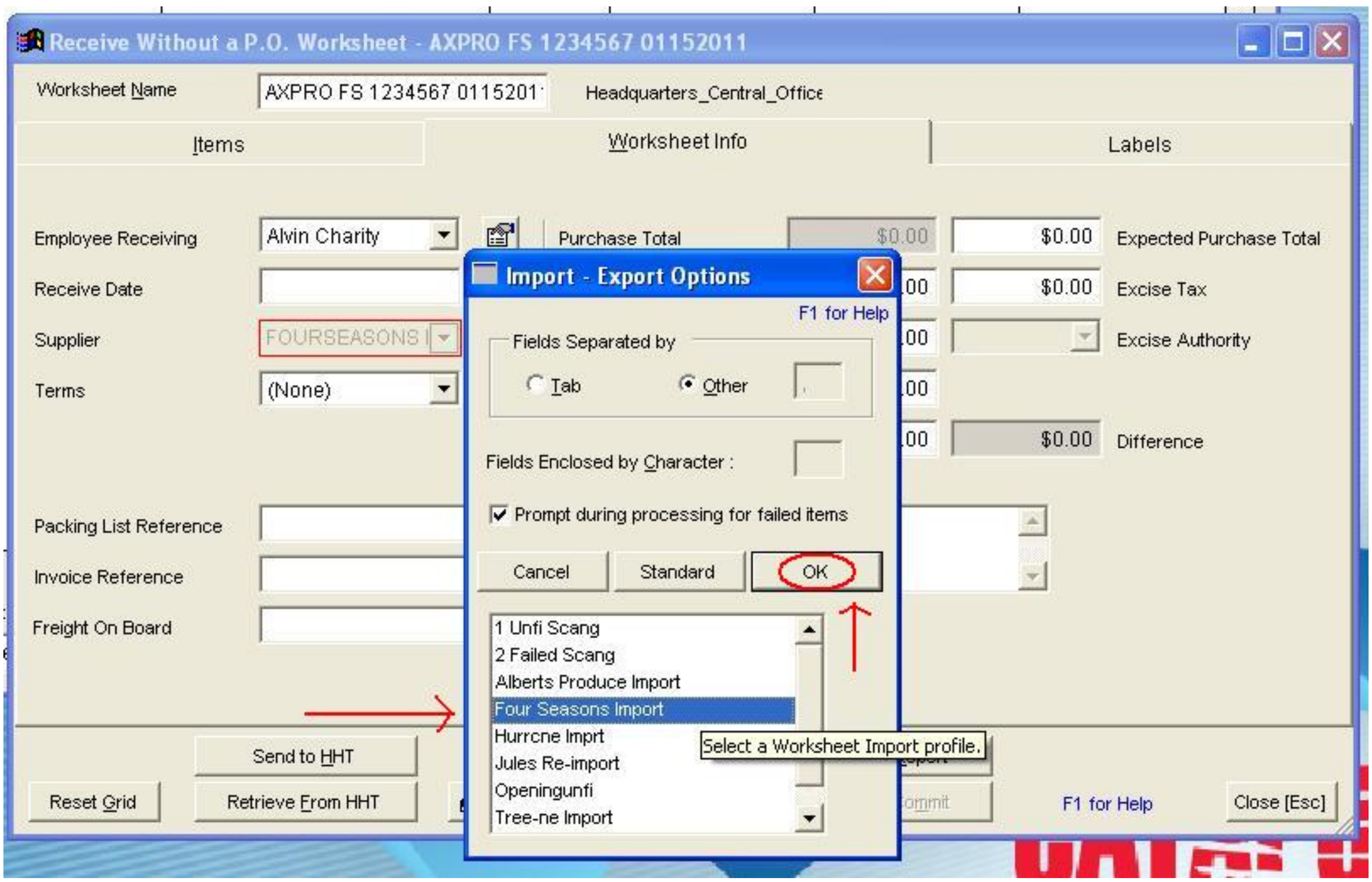


2. After you click OK, a window will appear, allowing you to select options for importing your CSV file. Locate and click the button marked “Advanced” at the bottom of the window.

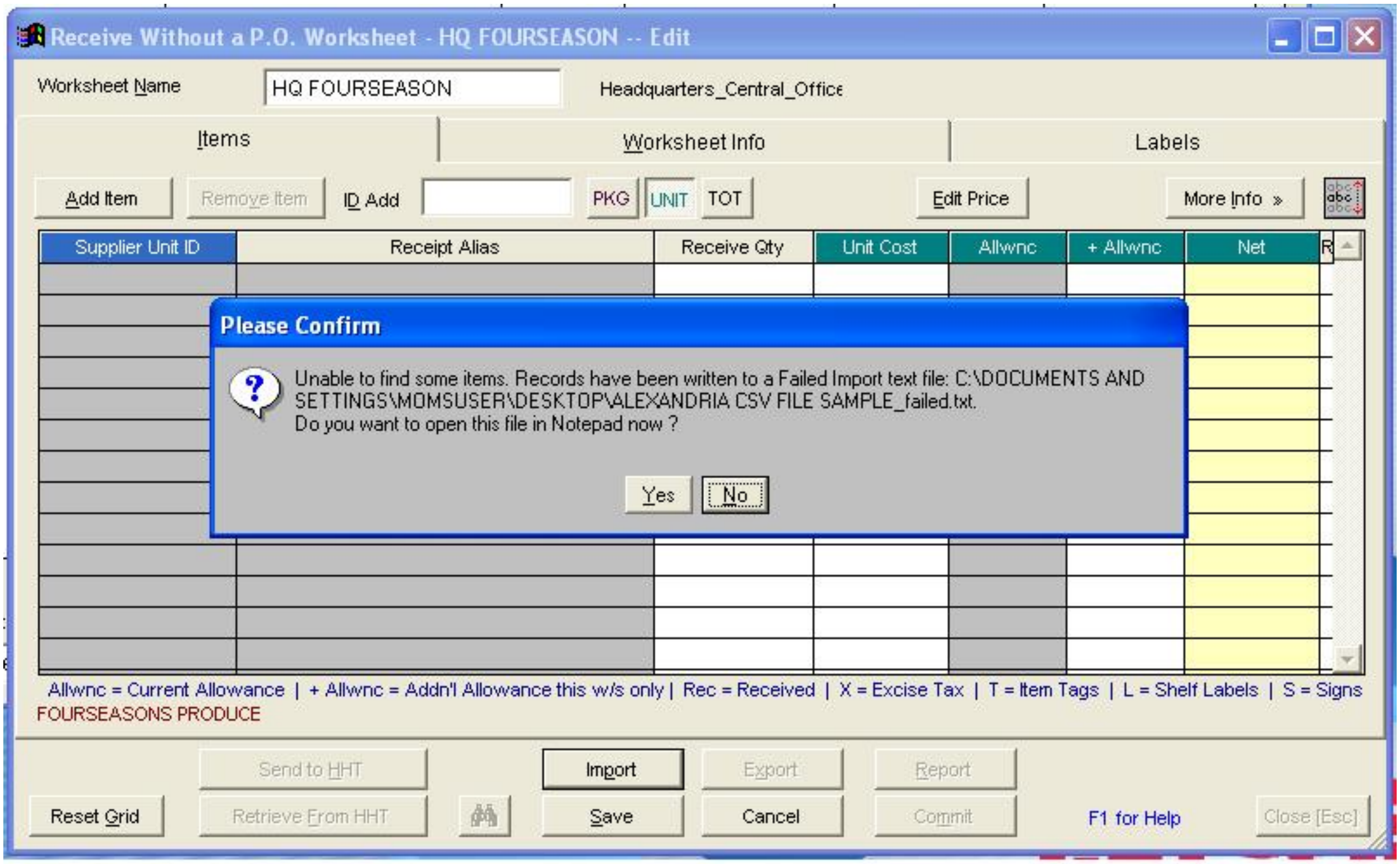
3. A menu will appear at the bottom of the screen, allowing you to select a vendor profile. Choosing the correct profile is extremely important, otherwise your CSV file will not import properly. Simply find the vendor in the list - these should be easy to find, they are titled by vendor: “Four Seasons Import” and “Alberts Produce Import.”

Currently, we are only able to import Four Seasons and Alberts invoices.

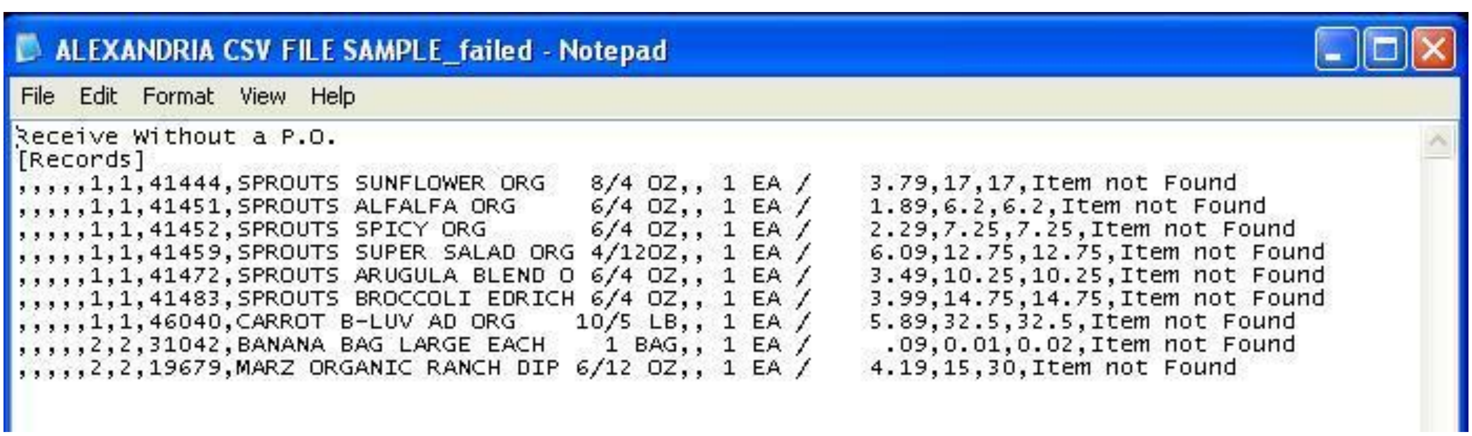
4. After you have located and selected the vendor profile, click OK. The items from the CSV file will import, which may take a few moments depending on the number of items on your invoice.



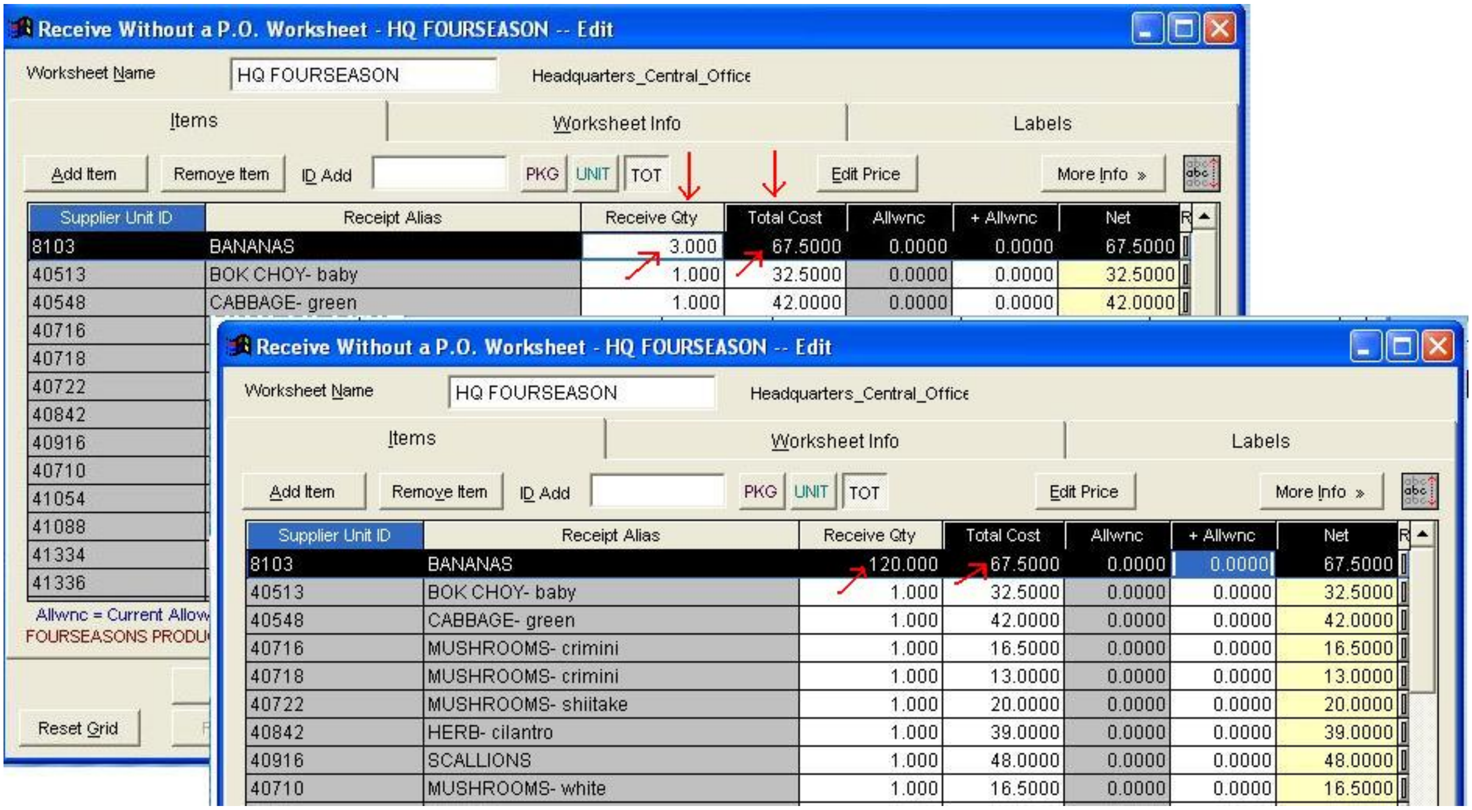
5. If any items have failed to upload, you must enter them into the worksheet manually. All items will be listed in a file that catapult will automatically save to the computer. The process of entering items manually is explained in the “Receiving Invoices and Credit Memos into Catapult” instruction guide.



Please submit all failed items through the "Catapult Item Issues" Form so that they can be updated in catapult. Be sure to send these as soon as they appear – we rely on these form submissions to update items, and updating will prevent delays when receiving invoices.



6. Once all items have been added to your worksheet, you must check each item to be sure that the correct numbers in the "Receive Quantities" and "Total Cost" columns are entered.



***NOTE on Adjusting Product Totals on Four Seasons Invoices:** Currently, Four Seasons totals are not correct, and you must go through the worksheet and adjust the totals for each item. Simply locate the item on the physical copy of the invoice and adjust the totals to match the invoice.

For all items (each or lb) you must enter the total weight or count of the case. For Example: Apples always come in 38 lb cases, so you would enter 38 as the "Receive Quantity." For more than 1 case, just multiply the weight or count of the case by the number of cases (3 Apple cases x 38 lbs per case = 114 lbs *OR* 2 Collard Green Cases x 24 ct = 48 bunches).

Be sure to enter the item by the unit we sell them for, not by the unit the vendor chooses. There are several items that are sold to us as Ea, but we sell as Lb (Broccoli, Cauliflower, etc) and vice versa. **Always enter case totals in units we use, and not the units listed on the vendor invoice!**

7. Click the "**Save**" button in the bottom center of the page.

8. After saving, return to the "Worksheet Info" page. If everything has been entered correctly, the "**Purchase Total**", "**Expected Purchase Total**", and "**Invoice Total**" should all be the same; while the "**Difference**" should be zero. If this is not the case, go back to the "Items" page and double check all

totals, quantities, and items to be sure they are correct. Remember: **The number in the "Invoice Total" box will not update unless you save the worksheet.**

9. If all items on the invoice are entered, and everything is correct, click the "**Report**" button in the bottom center of the page. A box will appear, choose the second option, "**Items received by department without Purchase Order**". Then click "**Display**".

10. A **"Report Viewer"** page will appear. This is a list of all the items added onto the invoice and the margins we make based on the prices that are currently in Catapult. Scroll way over to the right and take a look at the percent margin column. Check the margins to make sure none are really bizarre. If a margin is negative (red), this is an indicator an item has been added incorrectly (quantities are wrong, it's the wrong item, the price is wrong, it's in the system incorrectly, etc.). Same thing goes for a margin that is extraordinarily high.

It is also helpful to check the "Received Quantity" section of this report. If any of these numbers do not match the amount of product you received, there may be items from your invoice that have been entered into catapult incorrectly. Make sure you make any adjustments to the "Receive Quantity" section of the worksheet before committing.

On the last page of the report, there is an "Average Margin." As long as all items are entered correctly, the average margin should give you a good idea of your pricing accuracy as it relates to the vendor.

11. Save again.

If **you notice that you have made a mistake that you can not correct** (enter an invoice twice, select the wrong supplier, etc), **or need to delete a worksheet for any reason, DO NOT COMMIT THE WORKSHEET. Put an X in front of the worksheet name and save.** Evy will delete these worksheets monthly.

13. If the invoice is entered completely, correctly, and a report has been reviewed for accuracy, it's okay to go ahead and commit the invoice. This is permanent, so it's really important to be sure that everything is done correctly. If everything is correct, press the "Commit" button on the bottom right.

A message will appear asking if a report should be run for this worksheet. Click yes and select **"Items received by department without Purchase Order."** DO NOT PRINT THIS REPORT. This report should be saved in PDF format by clicking the "file" button on the upper left corner of the report window. When the save screen appears, select "PDF" from the drop down menu. All reports should be saved in the "Produce File Server" at each store. If you are unsure about the location of the file server, contact Alvin or Evy.

14. The process for entering invoices is complete. **Remember – If you can't find an item in Catapult, use the "Submitting New Items" Form. If you have general issues with entering invoices, use the "Catapult Issues" Form, and feel free to contact Alvin at any time.**

Receiving Invoices – Special Circumstances

Although entering most invoices is a relatively straight-forward process, there are occasions when a vendor is not equipped to provide the Produce department with invoices separate from credit memos, or when grocery items cannot be separately invoiced. In these situations, it is important for Produce Managers and Assistant Managers to be aware of the process needed to enter these invoices.

> **NOTE:** Please follow these instructions carefully. Failure to properly receive these "Special Circumstance" invoices will result in delays in our vendors being paid and/or accounting issues that create more work for both Produce Managers and members of the Accounting Department. If you still need clarification about these processes after reading the instructions below, please contact Alvin or your District Produce Manager for more information.

Receiving Invoices that Contain Grocery Items

With smaller vendors, it is not unusual for grocery items to be placed on the same invoices as produce items. In these instances, it is important for the Manager who is receiving the invoice to remember a few things before proceeding:

- These types of invoices should be received using only one worksheet. Do not create a separate Produce worksheet.
- Discuss the invoice with the Grocery Receiver in your store before attempting to enter any items. Let them know what Grocery items are on the invoice, and when you will enter items into the Produce portion of the invoice in catapult.
- Invoices containing Grocery items should not be committed until both Produce and Grocery items have been entered into the worksheet. The Grocery Receiver will enter their items into the worksheet, but it is important to discuss who will be responsible for committing.

To Receive Invoices that Contain Grocery Items:

1. Open Catapult and create a "Receive Without a P.O." worksheet.
2. Enter all produce items from the invoice into this worksheet.
3. Be sure to double-check all costs and quantities entered into the worksheet to be sure there are no errors.
4. Save this invoice. **Do Not Commit.**
5. Let the grocery receiver know that you are finished, and give them the worksheet name and original copy of the invoice so they can enter the grocery items.
6. Either the produce manager or the grocery receiver can commit the invoice, but be sure that you discuss the procedure with the grocery receiver to be sure it is committed.

If the Grocery Receiver is Not Available:

There may be times when your grocery receiver will not be available to complete the invoice on the same day, so you will have to receive the invoice using a slightly different method. **The instructions below should only be used in these cases, and should not be relied on to commit these types of**

invoices on a regular basis. It is important to avoid using this method unless necessary because having two worksheets in Catapult for the same item causes confusion with our accounting department. This could result in delayed payments to our vendors.

To receive this invoice when the grocery receiver is unavailable, please complete the following steps:

1. Email the grocery receiver in your store to let them know about the invoice. You will have to commit the produce items on the invoice, and the grocery receiver will commit the grocery items. Be sure to mention the naming process below.
2. Open Catapult and create a "Receive Without a P.O." worksheet.
3. The worksheet title should contain an "A" or "1" at the end to indicate that there will be a second worksheet. The grocery receiver will attach a "B" or "2" to the end of the worksheet that they commit to indicate that they have completed the second worksheet for this invoice.
4. Enter all produce items from the invoice into your worksheet.
5. Be sure to double-check all costs and quantities entered into the worksheet to be sure there are no errors.
6. It is important to communicate to accounting why the invoice is being committed with two worksheets. In the "comments" box of the worksheet, include a short summary of what you entered into the worksheet, and the title of the second worksheet that will be committed by the Grocery Receiver.
7. Save this worksheet.
8. If you are certain all items have been entered correctly, you may commit.
9. Pass the original copy of the invoice on to the grocery receiver. Be sure to include the title of your worksheet so they can use the same information for the worksheet they commit.

Receiving Invoices that Contain Credits

Many of our local vendors do not provide us with separate credit memos for bad or returned product, but will instead subtract the credit total from the next invoice that is sent to your store. Since these credits are not assigned a separate credit memo slip or number, they must be received using the procedure described below. Please remember that this process should only be used in the event that you receive an invoice with credits subtracted from the invoice total.

These types of invoices are the **only** exception to using the credit memo worksheet. **Please do not use the "Receive without a PO" worksheet for credits that have separate memos.** The worksheet should be named using our standard worksheet naming procedure - no special worksheet name is needed for this type of invoice.

Since the credits aren't being sent with their own separate memo, **it is not necessary to add these credits to the Margin Tracking sheet**. The invoice total reflects the credits well enough, and the accounting department only looks at catapult worksheets (and not the margin tracking sheets) when it comes time to pay the vendors. Additionally, **these credits do not need to be entered into the credit log of your margin tracking sheet.** These credits were already deducted from the invoice total, so listing them again would result in them being counted twice in the end of period reports.

PLEASE NOTE: If the credits are deducted from the invoice on the same day (i.e. you checked a delivery for quality while the driver was there, and had to return items that came in), you do not need to use the method below. Simply enter the invoice as normal with the newly adjusted total that is hand-written somewhere on the invoice.

If you notice invoices that have any hand-written changes, please proceed by:

- Noting whether the hand-written items are credits from a previous delivery (typically in red ink).
- Noting any items that were credited from the same delivery.
- Calculating the cost of the items on the invoice, and subtracting any credits. If your total does not match the total hand-written on the invoice, contact the vendor with the details. Always double check your math.

To Receive Invoices with Credits Included:

1. Open Catapult and enter the items from the invoice as you would normally
2. Double-Check all costs and quantities to be sure there are no errors.
3. Enter the items that are being credited as negative totals. For Example: If you are being credited $28 for a 24 count case of Collard Greens, you would enter the dollar amount as "-28" and the quantity as "-24."
4. The negative dollar amounts will subtract from the worksheet total. When you are finished entering both the regular and credited items into Catapult, the total should match the total on the invoice. If this total does not match, please review your worksheet to be sure all items were entered correctly.
5. Save the invoice.
6. Once you are certain all items are entered correctly, you may commit.

Receiving Weights

This is a basic guide to receiving weights. Not every case will weigh this amount, but it is important that the same weight is entered for products on a consistent basis. For Example if the weight of a case of peaches fluctuates between 16 and 20 lbs over the course of a week, you should enter 18 lbs, since that is the average weight of the case. **NOTE:** there is usually (if not always) a case weight from the vendor. Please use this weight if the item you are receiving is not on the list below.

Weighed Items for Receiving into Catapult

Item	Weight	
Apples	38	
Apricots	16	
Bananas	38	Fair trade from Alberts are 38 lbs, otherwise 40. always check the invoice.
Broccoli	20	
Cantaloupe	35	
Cauliflower	28	
Fennel	22	
Grapefruit	30	
Leeks	20	
Lemons	38	
Nectarines	18	
Oranges (valencia/navel)	38	
Peaches	18	2-layer soft fruit is usually 18 lbs (except apricots), but volume fill is sometimes 22-25 lbs. check the invoice.
Pears	40-44	
Plums/Pluots	18-22	
Tangerines	20	Cases sometimes vary. The half-sized cases are usually around 20 lbs, but some tangerines come in full-size cases. Check the invoice for weig
Watermelon (4-6 ct)	35-55	Cases vary, depending on the size of the melons. Bins vary, check the invoice or the pricelist

***When you bring new items into your departments, always check the weight on the invoice before receiving.**

****If you bring similar items in from different vendors, remember to check the weight on the invoice before receiving**
(Example: Watermelon cases from Alberts might be a different weight than Watermelon cases from Four Seasons)

*****This list is a basic guide, so there may be other items whose weight is uncertain. It is important to always check your invoices to calculate the weight before you receive.**

Receiving Invoices Checklist

Before Receiving the Invoice

- [ ] Saved the CSV Invoice to your computer
- [ ] The Receive Without a P.O. worksheet in Catapult was named correctly
- [ ] All other appropriate information was entered into the "Worksheet Info" section of the Receive Without a P.O. worksheet

Receiving the Invoice

- [ ] The CSV file was Imported into the worksheet electronically
- [ ] Failed Items were entered into the worksheet manually
- [ ] In the "Items" section of the worksheet, the "TOT" button was pressed
- [ ] All totals in the "Receive Quantities" and "Total Cost" columns in the worksheet have been adjusted
- [ ] All totals and items in the worksheet have been compared with the totals and items on the physical copy of the invoice

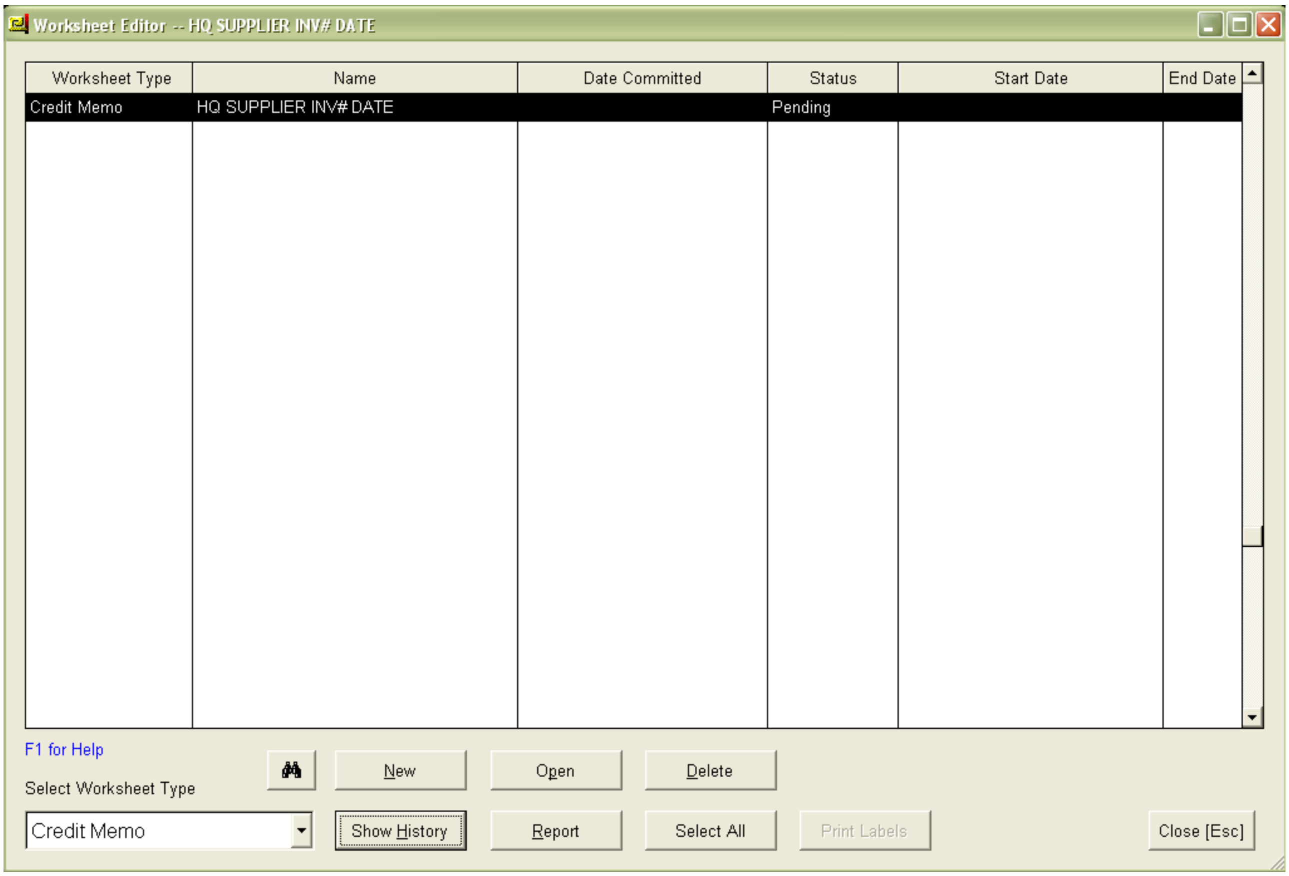
After Receiving the Invoice

- [ ] The Worksheet has been saved
- [ ] The "Worksheet Info" and "Items" sections have been checked for errors.
- [ ] **The "Items Received by Department without Purchase Order" report has been run to find cost or quantity errors <u>before committin</u>**
- [ ] Any errors have been corrected.
- [ ] The worksheet has been saved and committed
- [ ] The "Items Received by Department without Purchase Order" report has been printed and stapled to the physical copy of the invoice

Receiving Credits/Credit Memo Worksheets

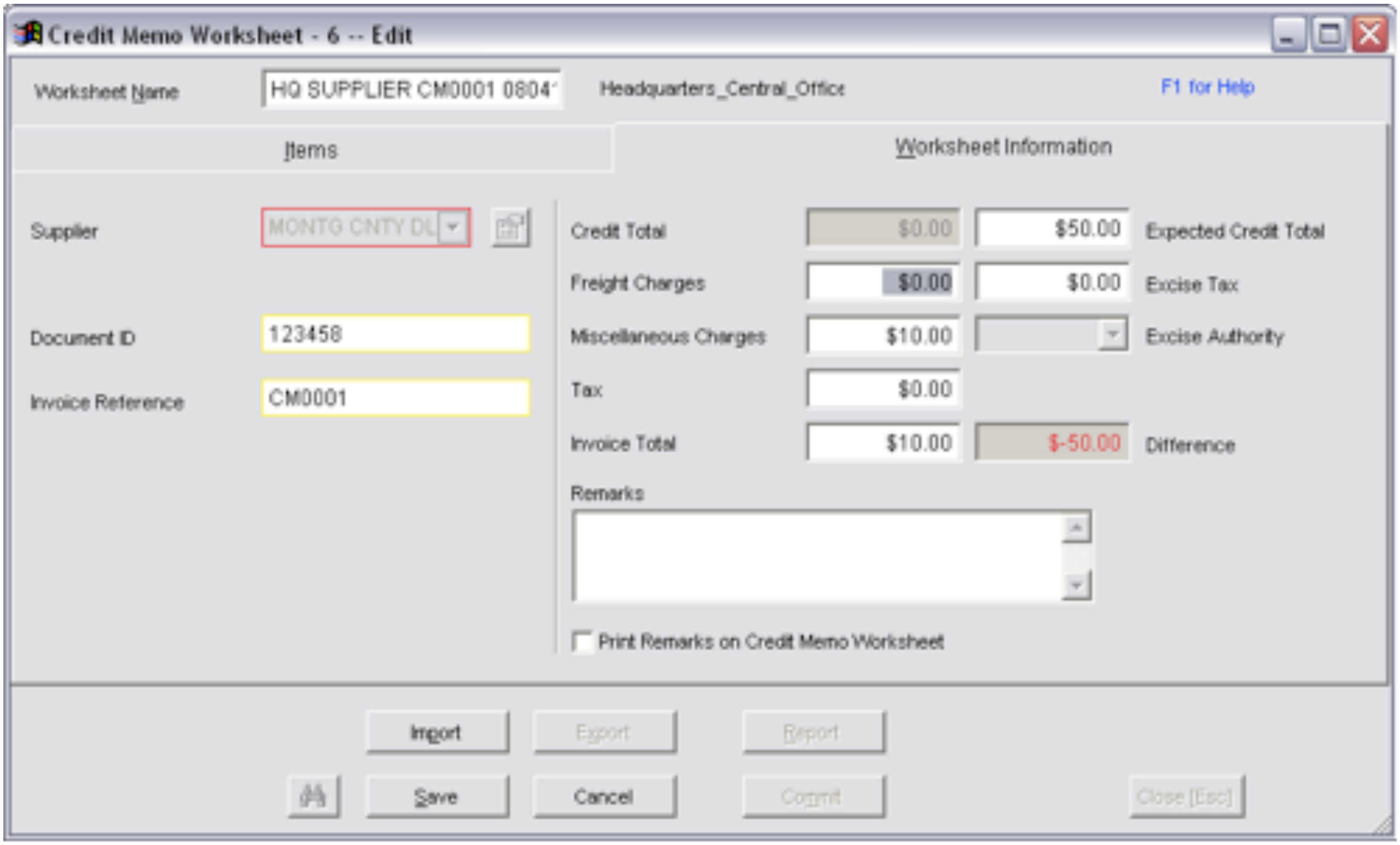
This worksheet does not have a option to view detail information on each item like in a Receive without a P.O. Worksheet so you will need to look up case sizes to enter the correct quantities for credit quantities less than a case. All quantities should be positive since the worksheet subtracts the quantities and costs from the current inventory, in other words there is no need to enter negative numbers like your would in a Receive without P.O. Worksheet.

1. Go to **Worksheets** from the file menu and then choose Credit Memo from the Select Worksheet Type drop down.



2. Click **New** to create a new worksheet or select a worksheet from the list and click **Open** to continue a worksheet already started. Name the worksheet the same way you would a Receive without P.O. worksheet – XX PRO Vendor CM# DATE (in MMDDYY format)
   - For Example: RV PRO FS 012345 081012
3. There are two tabs, Items and Worksheet Information

4. Worksheet tab



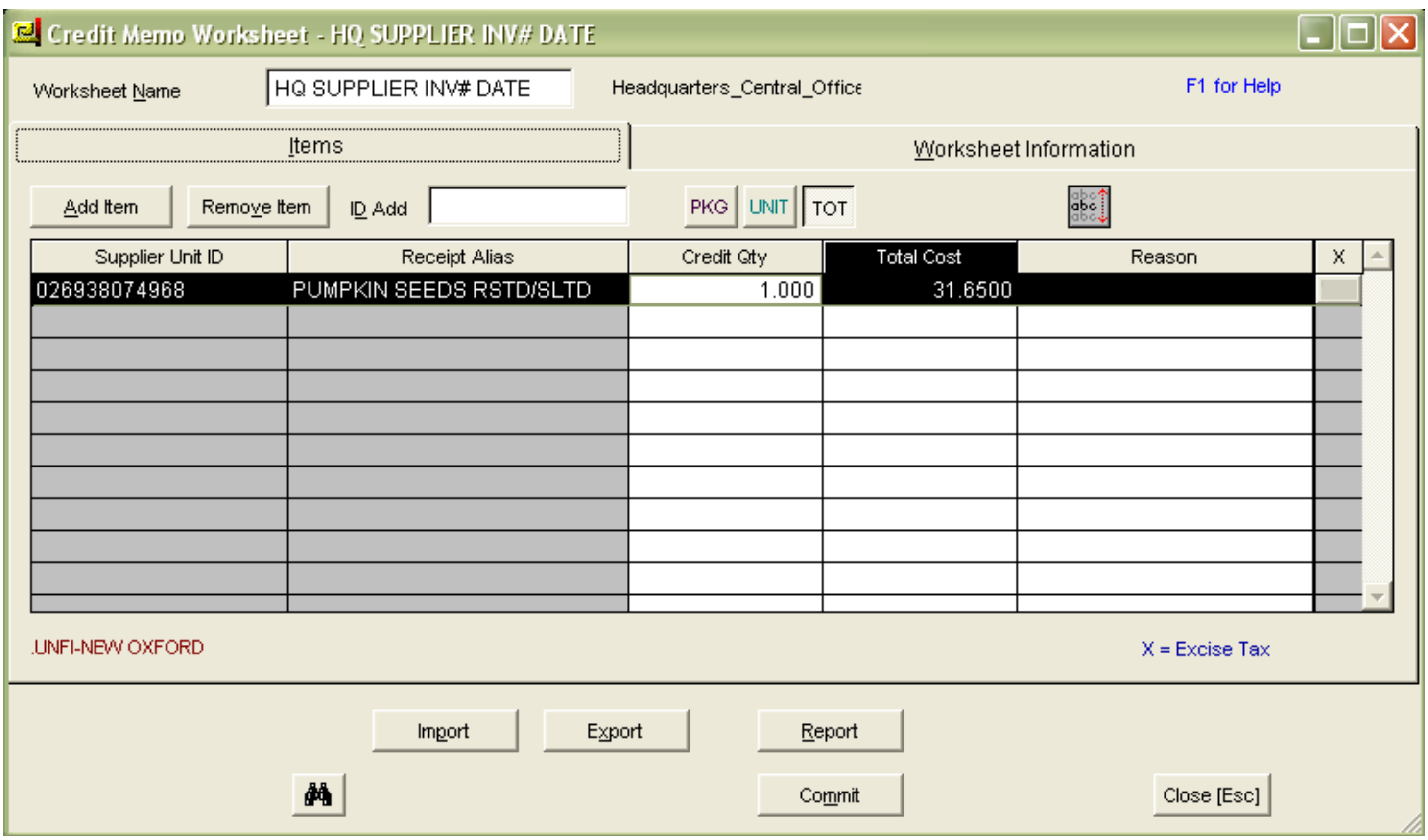
A. Select supplier for the credit memo
B. Enter credit memo number in Invoice Reference box. If it is on the credit enter the six digit date prefixed by "CM" (CM<MMDDYY> = CM060811). Invoice Reference must have a value to commit.
C. Enter invoice number of the invoice that is being credited in Document ID box. If the invoice number is not known/available then use the credit memo number. Document ID must have a value to commit.
D. Enter the total credit amount excluding freight charges, miscellaneous charges and tax into Expected Credit Total box.
    1. If Credit Memo total = $879.00, Shipping $7.83, Miscellaneous Charge $5.00 then Expected Credit Total = $879.00-($7.83+$5.00) >> $886.17
E. Enter shipping or freight in Freight Charges box if applicable.
F. Enter any other charges in the Miscellaneous Charges box if applicable.
G. Save the worksheet by clicking **Save**.

5. Items tab

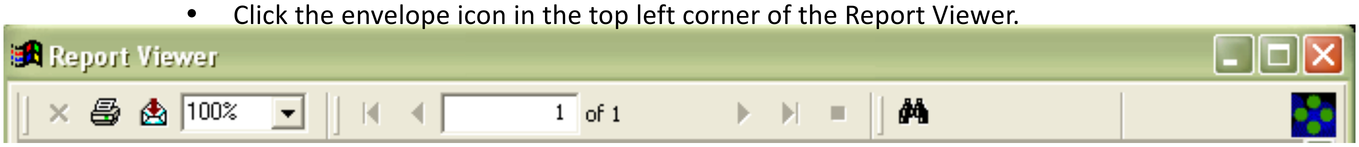
A. Click the TOT button to enter to the total cost per item and avoid entering total costs as unit or package costs.

B. Click **Add Item** to search for items or enter the Item ID or UPC into the ID Add box to add items to worksheet. All quantities and total costs should be positive.

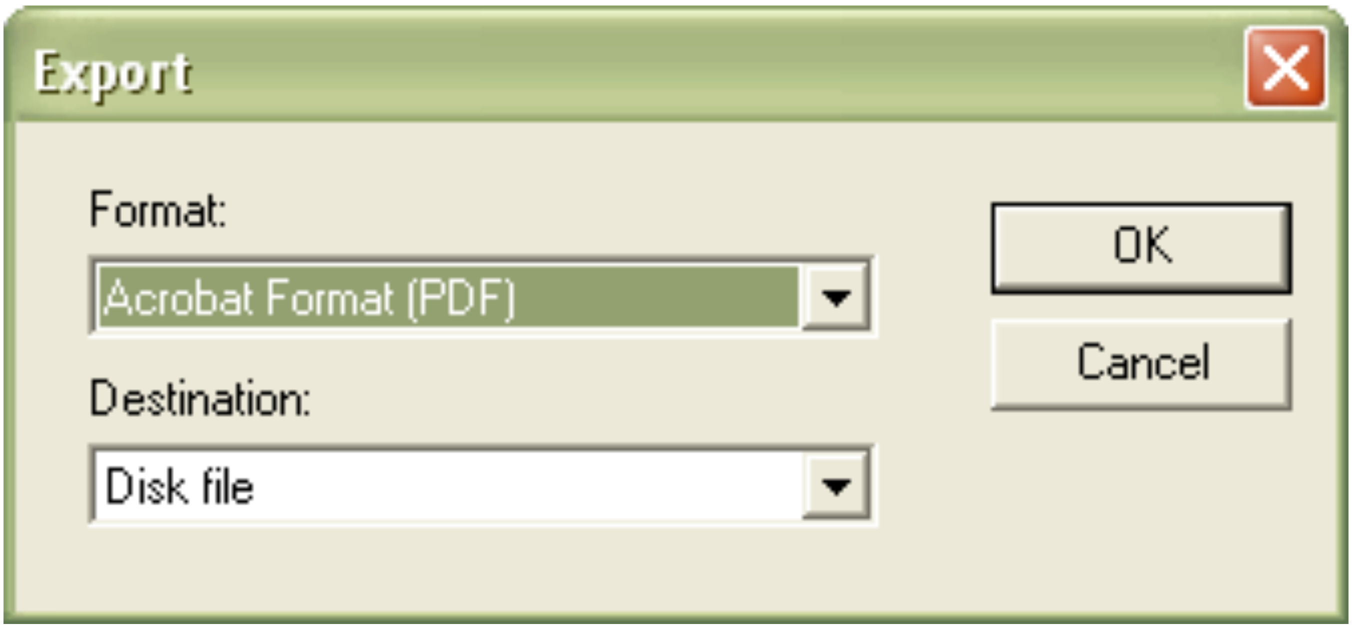
1. If the credit indicates credit for a quantity less than the case size and the item only has a case ID for the supplier in Catapult divide the quantity received by the case size in Catapult.
   - Loose Beets are 25 lb in Catapult , you receive credit for to lbs >> 10/25 = .40 >> Credit Quantity is .40
2. Enter total cost (positive number) in the Total Cost column for each item.
3. Click **Save** when finished adding items and editing quantities and costs.
4. Go back to the Worksheet tab to verify that the total of the worksheet matches the expected totals entered.
5. Click **Report** and then click **Display** to view a report of the worksheet.



6. Export the report
    - Click the envelope icon in the top left corner of the Report Viewer.



    - Verify the Export format is Adobe PDF and the destination is Disk File and click OK.



    - Verify Page Range is set to All and click OK.
    - Save to the location where all invoice exports are stored and name the file the same name as the worksheet name.
7. You are done.

Receiving Credits Checklist

Before Receiving the Credit Memo

- [ ] Gathered all credit memo information (electronic memos, physical copies, etc)
- [ ] The Credit Memo Worksheet was named correctly
- [ ] **The Credit Memo Number has been entered into the "invoice Reference" and "Document ID" Box.**
- [ ] **If you are entering a Four Seasons Credit Memo, you have made sure to separate all individual credit memo numbers from the sheet.**
- [ ] All supplier and credit memo information has been entered into the "worksheet information" tab, and all information has been reviewed for accuracy.

Receiving the Credit Memo

- [ ] In the "Items" tab, the "TOT" button was pressed before entering any information into the worksheet
- [ ] All information in the "Credit Quantity" column has been entered as a positive number.
- [ ] The amount of the credit has been entered into the "Total Cost" column of the worksheet.
- [ ] All totals in the "Credit Quantity" and "Total Cost" columns have been reviewed for accuracy.
- [ ] All information entered into the worksheet has been checked against the vendor Credit Memo for accuracy.

After Receiving the Credit Memo

- [ ] The Credit Memo Worksheet has been saved
- [ ] The "Worksheet Info" and "Items" sections have been checked for errors.
- [ ] All information in the "Worksheet" tab has been reviewed to be sure that the total of the worksheet matches the expected totals entered.
- [ ] Any errors have been corrected.
- [ ] The worksheet has been saved and comitted.
- [ ] A report for the Credit Memo worksheet has been saved to your computer.

Local Totals

During "Local Season" (typically mid/late spring to mid fall), the MOMs Produce Buyer organizes the delivery of local produce from various Maryland and Pennsylvania farms. These deliveries are received at a central location, and sorted for each store for delivery.

Saturday Aug 12 Local Breakdwon

You will be getting a drop from the MOM's truck & from LFFC
Blow out bin cantaloupe as low as $0.69
Blow out roma tomatoes on sale at $1.99

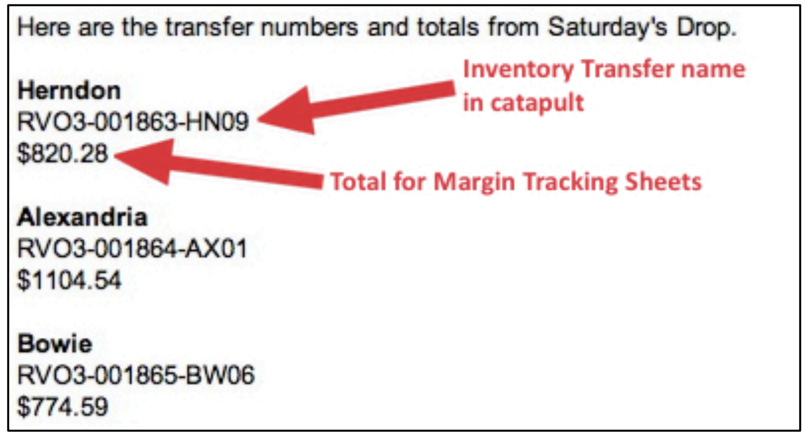
PLU	Item	Available	Actual	Per case	Origin	Comments
395	Yellow onions		41	40 lbs	PA	Weeks worth
393	Red onions		20	40 lbs	PA	Weeks worth
315	beets, red loose		20	40 lbs	PA	$1.99 sale item
137	Cantaloupe	12	12	35 lbs	PA	
212	rhubarb	8	8	10 lbs	PA	
320	green cabbage	8	8	45 lbs	PA	
322	red cabbage	8	8	20 lbs	PA	
327	bu. Carrots	3	3	12 ct	PA	
340	Collards	7	7	24 ct	PA	
364	Lacinato	3	3	24 ct	PA	
365	green kale	6	6		PA	Needs washing
405	Green Peppers	16	16	25 lbs	PA or MD	$1.99 sale item
501	Basil	2	2	20 bags	PA	
353	Eggplant, reg	8	8		MD	
582	Eggplant, multi	8	8		MD	
480	Inverness heirlooms tomatoes	8	8	25lb?	MD	
480	Mixed Heirlooms	31	31	10 lbs	PA	
478	Regular Tomatoes	19	19	20 lbs	PA	
99993	Sungolds	11	11		PA	
99991	Rainbow cherries	12	12		MD	
1159	Tomatillos	8	8	10 lbs	PA	
211	Plants	264	264			

Before the delivery is made, Produce Managers will receive an allocation email and spreadsheet that lists the specific products and case totals that they will receive. Since these case totals need to be entered into Catapult into the Inventory Transfer worksheet, it is important to keep track of this email until the Inventory Transfer worksheet is available in Catapult (it sometimes takes up to 2 days for the Inventory Transfer worksheets to appear).

Herndon

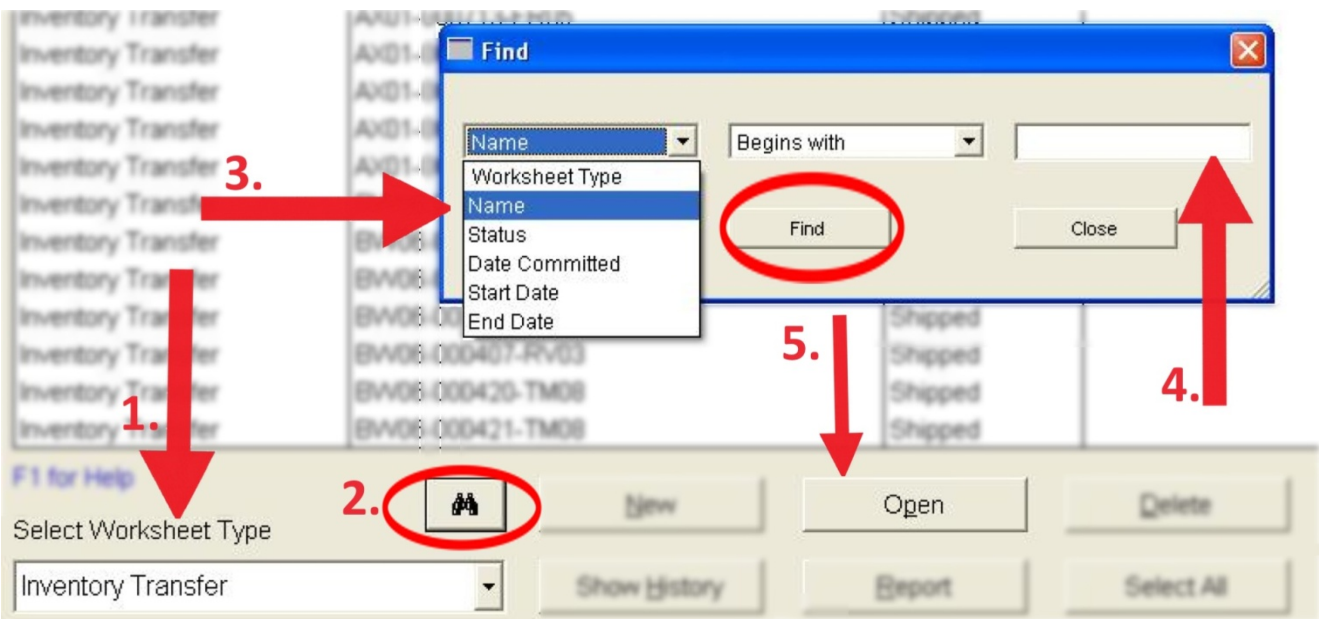
PLU	Item	Quantity
395	Yellow onions	3
393	Red onions	2
315	beets, red loose	2
137	Cantaloupe	3
212	rhubarb	1
320	green cabbage	1
322	red cabbage	1
327	bu. Carrots	1
340	Collards	1
364	Lacinato	1
365	green kale	0
405	Green Peppers	1
501	Basil	0
353	Eggplant, reg	1
582	Eggplant, multi	1
480	Inverness heirlooms tomatoes	1
480	Mixed Heirlooms	2
478	Regular Tomatoes	2
99993	Sungolds	1
99991	Rainbow cherries	1
1159	Tomatillos	1
211	Plants	33

The invoices for these deliveries are handled by the Regional Produce team, but to account for the cost of each stores local product, an Inventory Transfer worksheet is created and sent to each store. The transfers and cost are both listed in the “Local Totals” email that is sent out by the Produce Buyer shortly after each delivery is made.



To find the transfer in Catapult, simply:

1. Select “Inventory Transfer” as the Worksheet type
2. Click the binoculars to search for the Inventory Transfer name
3. When the Find box appears, click the down arrow, and select “Name” to search for the name of the Inventory Transfer
4. Enter some or all of the Inventory Transfer name into the blank space on the right side of the Find box
5. Once the worksheet is found, click “Open” to open the Inventory Transfer



For detailed instructions on receiving the Inventory Transfer, please see the “Creating and Receiving Inventory Transfers in Catapult” file.

It is extremely important that these transfers are received in catapult, and the total dollar amount is entered into the Margin Tracking sheet as soon as possible.

Box Count Policy and Explanation

In order to provide customers with the freshest possible products at all times, we track the number of Boxes a Produce Department has in back stock at any given time. Currently, the weekly box count average for every department should fall between 25 and 35 boxes.

A department that averages noticeably higher than 25-35 boxes per day often indicates:

- There might be issue with ordering. This sometimes means that there is consistent over-ordering happening in the department, which sometimes happens during change in seasons (specifically from Spring to Summer). During these times it is important for the Produce Manager to run sales history reports to get an accurate view on how much should be ordered on a day-to-day basis.
- If there are a lot of cases of product on back stock, but the displays are running out of product, there may be too many of the wrong products on back stock (items that do not sell fast enough to necessitate having multiple cases). It is also important in this case to review sales history reports to be sure the right products are being ordered on the right days of the week.
- Occasionally, having a high nightly box count is due to a lack of stocking by the produce night staff. This issue is usually resolved by explaining the importance of rotating and stocking all possible product during the evening to ensure that the displays are as abundant as possible.

A department that averages noticeably lower than 25 boxes per day often indicates:

- There might be an issue with ordering. This sometimes happens when a Produce Manager is overly concerned about purchasing too much, but neglects the needs of their department. Again, it is important to order the *right* products on the right days of the week, however, it is also important to have *enough* product (most importantly items included in the top 20 high sellers list for each department) in stock at all times. This means that every produce department should have enough products to fill all tables and baskets – it is okay to spread product out or "dummy up" baskets to give the department an appearance of abundance.
- Low box counts also indicates that the Produce Manager may need to pay extra attention to sales history reports to be sure that the amount of items in each order matches the projected amount of sales for the day. In this case, it is helpful to use the "Sales Projection Tool," which keeps a running total of the department sales history and provides an accurate basis for order totals.
- Low box counts occasionally are the result of changing seasons, specifically Winter to Spring and Summer to Fall. It is important to run sales history reports going into these times of year to ensure that our customers can always find what they need, and we are only carrying product that is as fresh as possible.

Every department varies, so there may be other issues that affect the average box count from week to week. The Produce Manager in each department should take advantage of all tools at their disposal (sales reports, fellow Produce Managers, GMs and AGMs, regional staff, etc) to better understand and increase department sales while serving needs of our customers.

Checking On Hand Totals in Catapult:
High and Low On-Hand Totals and Margins

The most frequent errors made in Catapult often result in wrong on-hand totals or wrong cost for items in your department. These errors are likely because the wrong case totals are being entered into catapult.

If this is happening in your department, you may notice:

- When you run the reports in Catapult (Department Net Optimized, Item Net Optimized, etc), you have an extremely high or extremely low (or negative) margins.
- Certain items on these reports also may have extremely high or low on-hand totals.

These mistakes are made more frequently when the person receiving invoices is not checking their work before committing. To find these errors, there are **three reports** that need to be run: **High Cost and On-Hand Detail Report, Low Cost and On-Hand Detail Report** and the **Optimized Net Sales Report.**

These reports should be run every Tuesday . This acts as a check on receivers and invoices being entered over the course of the previous week and allows you to find instances where inventory on-hand totals are entered incorrectly. This process should take no more than 30 minutes per week.

You should always choose **Monday to Sunday** dates for these reports.

As always, it is important that the person receiving in your department check their work before committing any invoices. It is the Produce Managers responsibility to ensure that all invoices are entered into catapult on a daily basis, and are committed without any errors.

Additionally, any invoices that are committed with errors must be reported to Alvin immediately. The Produce Manager is responsible for correcting any and all receiving errors in their department, regardless of who made them.

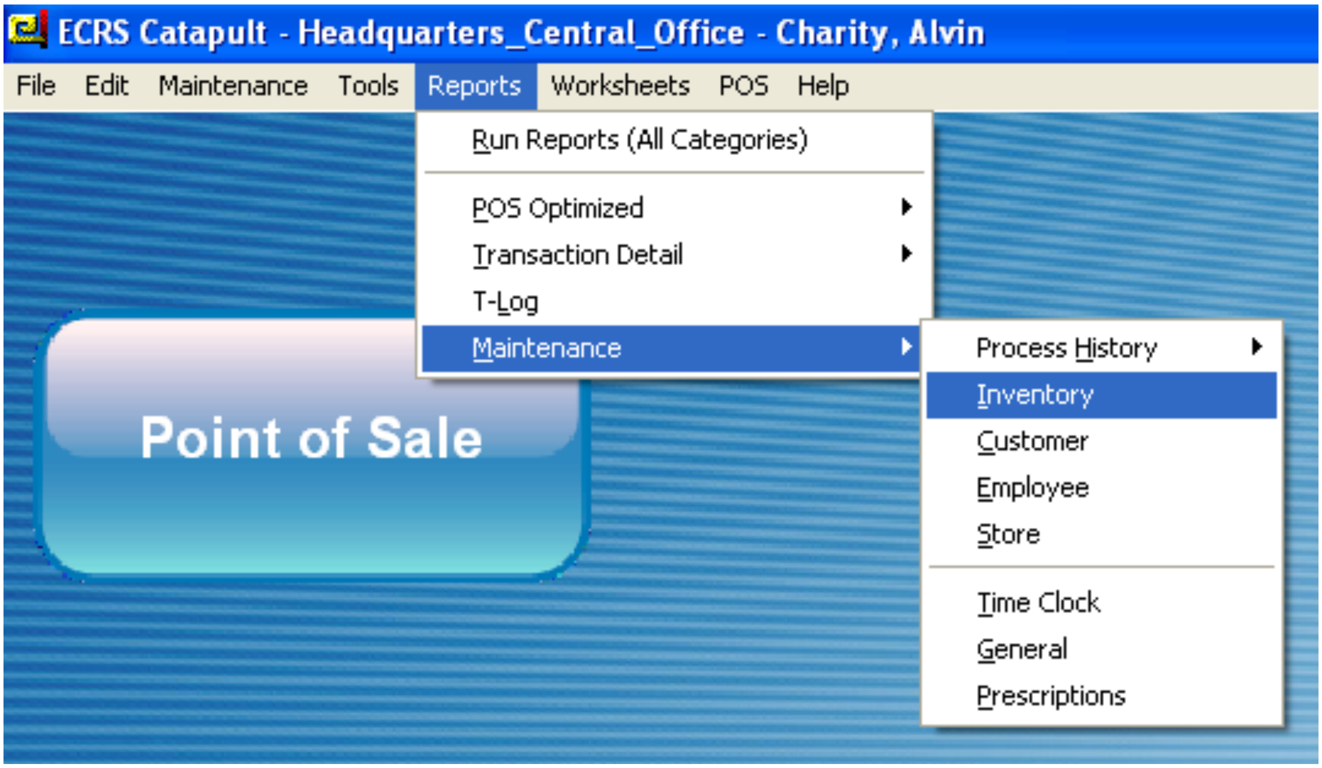
If there are any questions about receiving invoices into Catapult, please contact Alvin.

How to run the Cost and On-Hand Detail report in Catapult

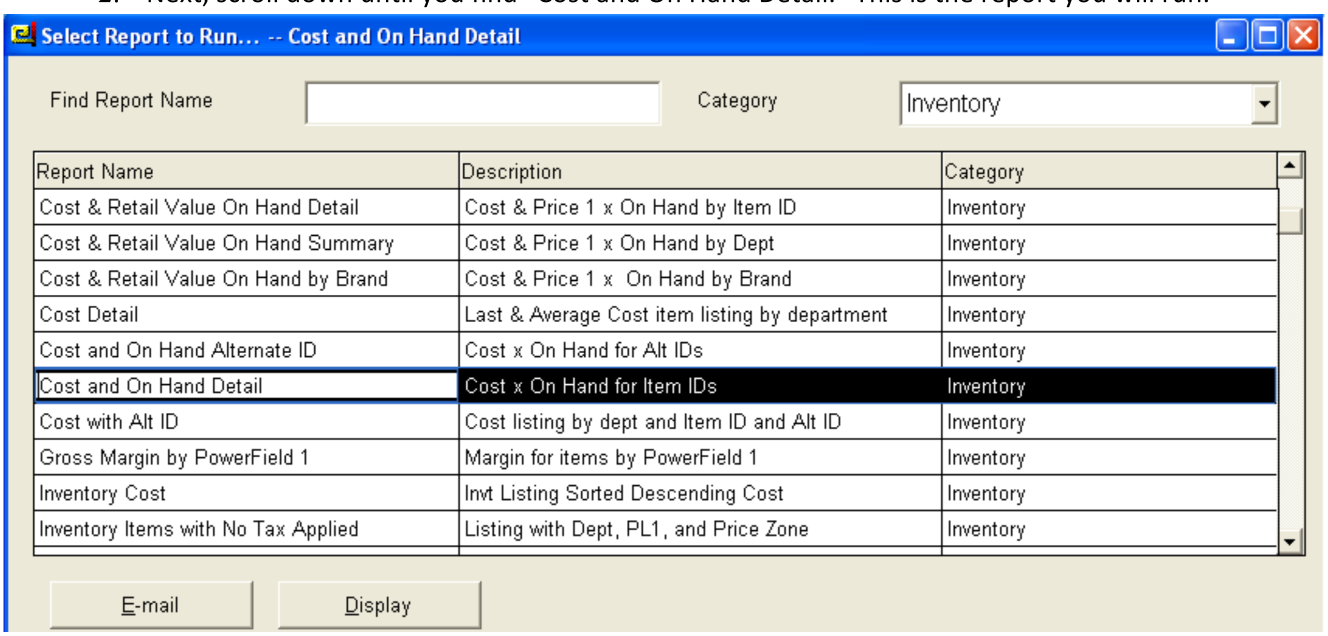
This report is used to check for extremely high or low on hand totals in your department. When the on hand totals in your department are extremely high or low (or negative), this is an indication of a receiving error.

To run this report:

1. Open and log in to Catapult
2. At the top of the page, select “Reports”.
3. When the drop-down menu appears, select “Maintenance” and then choose “Inventory.”

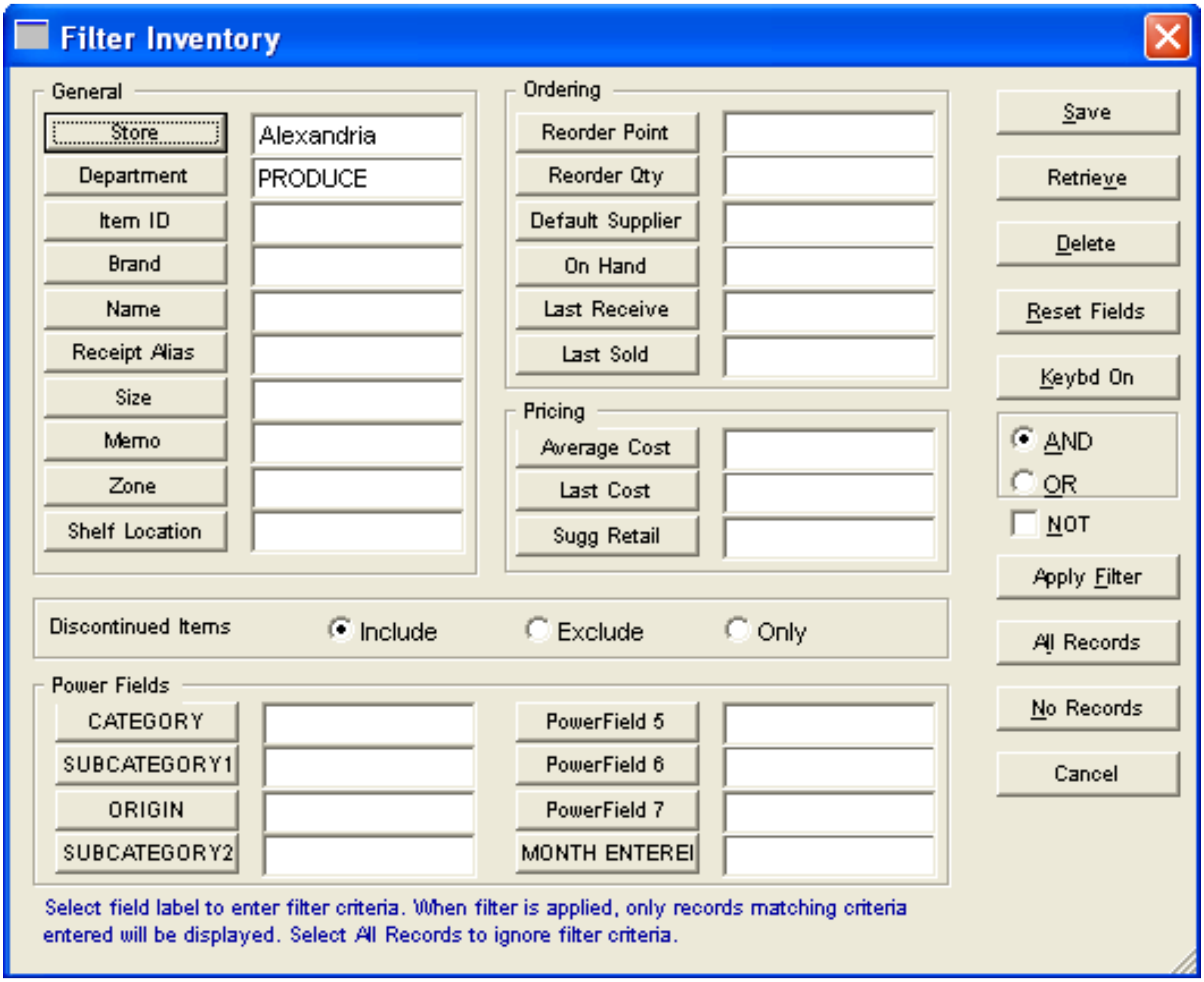


2. Next, scroll down until you find “Cost and On Hand Detail.” This is the report you will run.

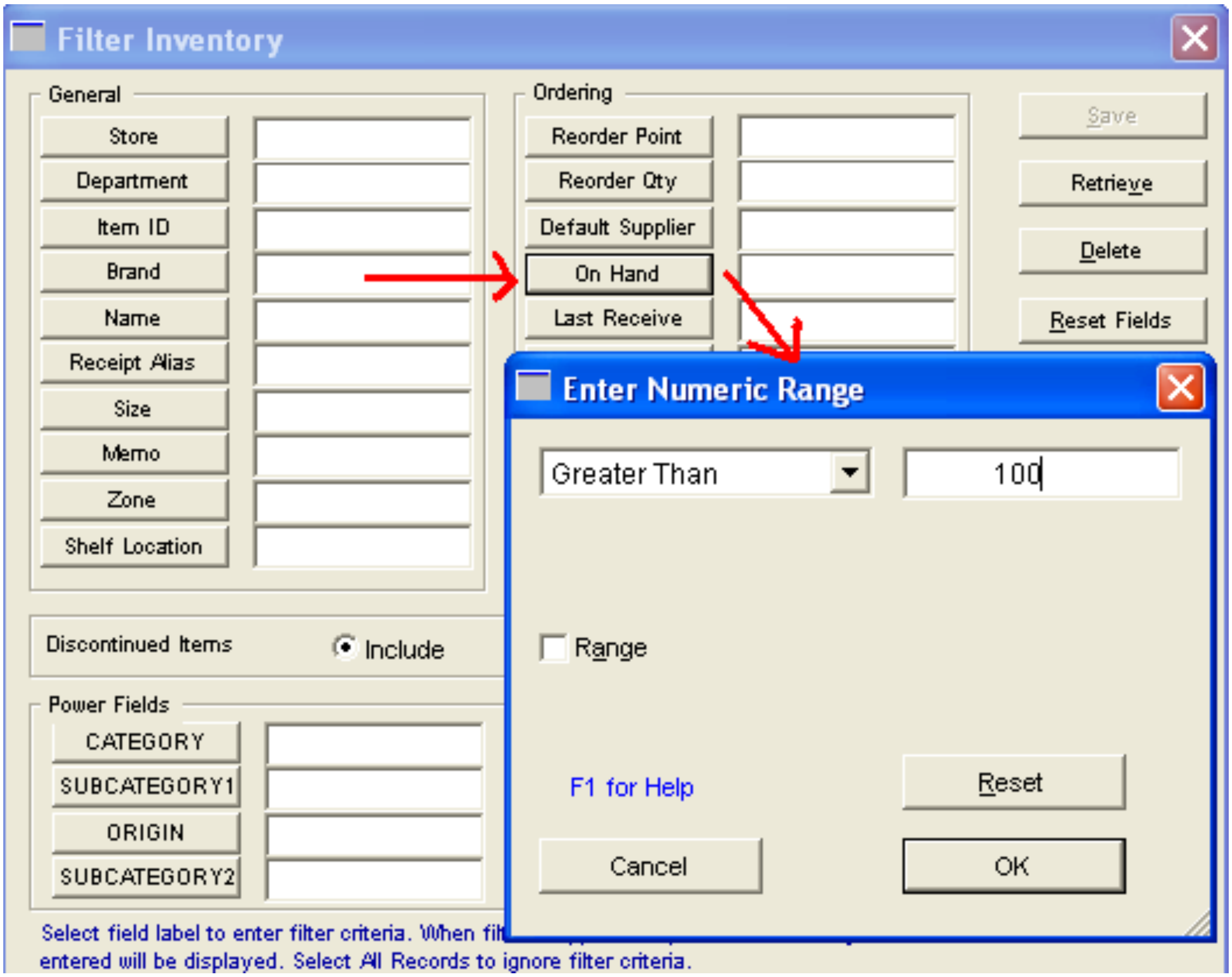


Report Name	Description	Category
Cost & Retail Value On Hand Detail	Cost & Price 1 x On Hand by Item ID	Inventory
Cost & Retail Value On Hand Summary	Cost & Price 1 x On Hand by Dept	Inventory
Cost & Retail Value On Hand by Brand	Cost & Price 1 x On Hand by Brand	Inventory
Cost Detail	Last & Average Cost item listing by department	Inventory
Cost and On Hand Alternate ID	Cost x On Hand for Alt IDs	Inventory
Cost and On Hand Detail	Cost x On Hand for Item IDs	Inventory
Cost with Alt ID	Cost listing by dept and Item ID and Alt ID	Inventory
Gross Margin by PowerField 1	Margin for items by PowerField 1	Inventory
Inventory Cost	Invt Listing Sorted Descending Cost	Inventory
Inventory Items with No Tax Applied	Listing with Dept, PL1, and Price Zone	Inventory

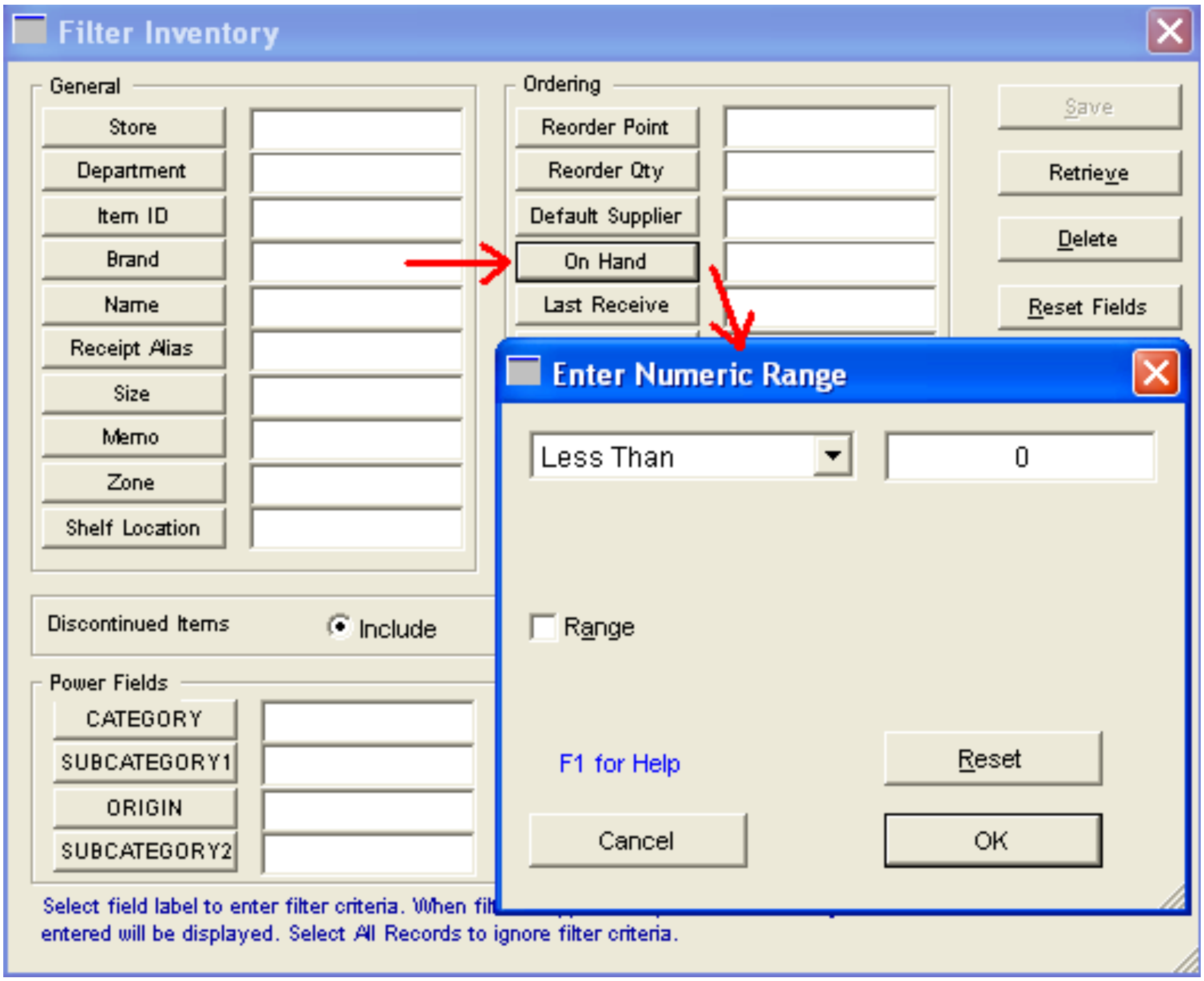
3. Click “display”. After the filter appears, click “Reset fields.”
4. In the Departments field, choose “Produce.”



5. You will have a choice to find High or Low on-hand totals.
   - **To find High on hand totals** -- In the "On Hand" field, choose "**greater than**" and enter the number **100.**



- **To find Low or Negative on hand totals** -- In filter, in the "On Hand" field, choose "**less than**" and enter the number **0**.



6. Look in the On Hand column for and make note of any unusual on-hand totals.
   - **If these totals seem too high**, these may be items you think are incorrect because the total in Catapult is a lot more than you currently have in back stock or they could be items you do not carry.

Cost and On Hand Detail

Page 1 of 1

Print Date : 4/17/2011 11:59 AM

Reporting Range : Department: PRODUCE
Store: Alexandria
On Hand: > 100.000

** High On Hand Totals **

Item ID	Receipt Alias	Store	Average Cost	On Hand	Ext Cost
318	BROCCOLI	Alexandria	$ 0.3929	548.270	$ 215.4153
Grand Totals				548.270	$ 215.4153

   - **If these totals seem too low**, these might be items that you think are incorrect because you know you have been physically receiving the product into the store, or you have been working with this product on a daily basis. This usually points to invoices not being entered correctly (or not all) into catapult.

Cost and On Hand Detail

Page 5 of 5

Print Date : 4/17/2011 12:01 PM

Reporting Range : Department: PRODUCE
Store: Alexandria
On Hand: < 0.000

** Low or Negative On Hand Totals **

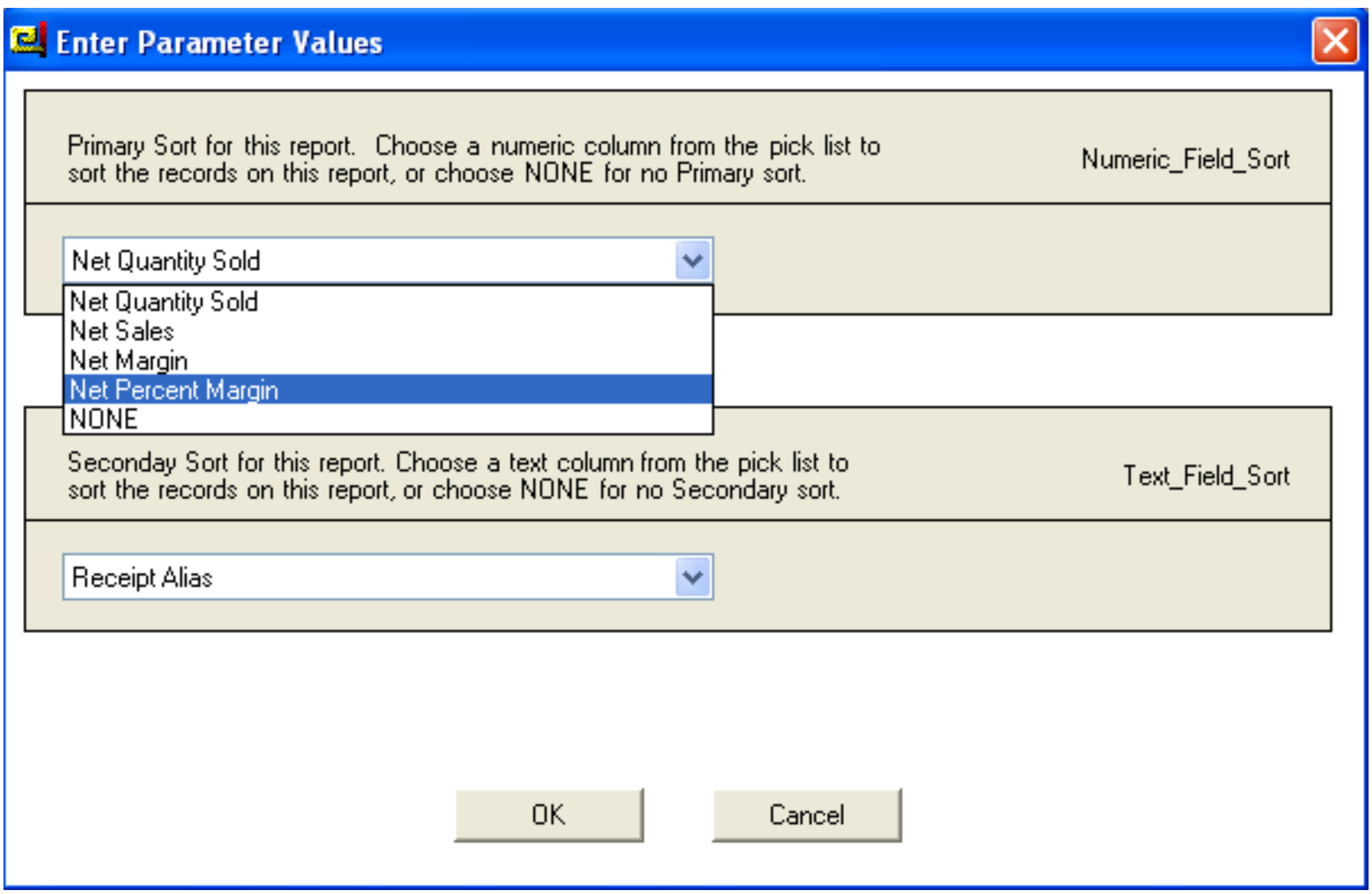
Item ID	Receipt Alias	Store	Average Cost	On Hand	Ext Cost
527	BOK CHOY- baby	Alexandria	$ 2.2500	(98.240)	($ 221.0400)
530	BEETS- gold loose	Alexandria	$ 2.1000	(29.070)	($ 61.0470)
99995	BROCCOLI SLAW PKGD	Alexandria	$ 0.0000	(36.000)	$ 0.0000
Grand Totals				(30,329.513)	($ 48,422.6806)

How To Run the Optimized Item Net Sales reports in catapult

The Optimized Item Net Sales report is used to check for extremely high or low margin percentages. When the margin percent is extremely high or low (or negative) on an item, this is an indication of a receiving error.

To run this report:

1. In Catapult, select "Reports."
2. Next, select "POS Optimized", and then choose "Inventory Transaction."
3. Next, choose "Item Net Optimized" and click "Display."
4. Enter the date range for the week (Monday to Sunday)
5. Enter the your store and click "Apply Filter"
6. When the "Filter Inventory" screen opens, click "Reset Fields"
7. Next, choose Produce as your department and click "Apply Filter"
8. Before the report appears, a screen marked "Enter Parameter Values" opens. On this screen you can choose from two menus. Pull down the menu at the top of the screen and highlight "Net Percent Margin." Then click OK.



A report will appear showing all items sold for the Monday to Sunday week in your department. The items will be listed by margin, so the first items will have the highest margin and the last item will have the lowest. A returns summary will also be listed separately on the last page.

Optimized: Item Net Sales

Page 1 of 6

Print Date : 4/17/2011 12:15 PM

Note: An asterisk (*) after Net % Margin indicates that Prompt for Price items with no cost used Ideal Margin assigned to inventory record to calculate margin.

Reporting Range: DateTime Range: 04/03/2011 12:00:00 AM - 04/09/2011 11:59:59 PM
Department: PRODUCE
Store: Alexandria

Report Sorted By: Net Percent Margin, Receipt Alias

Item Net Sales Summary

Item ID	Receipt Alias	Net Qty Sold	% Qty Sold	Ext Cost	Net Sales	Net Margin	Net % Margin
358	EGGPLANT- purple rain	0.180	0.00%	$ 0.00	$ 0.72	$ 0.72	100.00%
225	FENNEL	32.170	0.21%	$ 6.97	$ 128.36	$ 121.39	94.57%
206	PLUMS- red	1.510	0.01%	$ 0.76	$ 7.53	$ 6.77	89.96%
410	POTATOES- purple	57.600	0.37%	$ 17.35	$ 171.22	$ 153.87	89.87%
318	BROCCOLI	472.800	3.05%	$ 191.20	$ 1,412.27	$ 1,221.07	86.46%

a few examples from the beginning of the report

a few examples from the end of the report

Item ID	Receipt Alias	Net Qty Sold	% Qty Sold	Ext Cost	Net Sales	Net Margin	Net % Margin
472	ZUCCHINI	193.920	1.25%	$ 485.32	$ 579.85	$ 94.53	16.30%
033383655925	TOMATOES- LMF grape 1 pt.	216.000	1.39%	$ 675.00	$ 757.24	$ 82.24	10.86%
348	CUCUMBER	265.830	1.71%	$ 872.67	$ 794.27	($ 78.40)	(9.87%)
249	WATERMELON- seedless	38.090	0.25%	$ 41.55	$ 29.71	($ 11.84)	(39.86%)
364	KALE- lacinato	148.000	0.95%	$ 1,074.38	$ 441.92	($ 632.46)	(143.12%)
Item Net Sales Totals		15,521.583	100.00%	$ 24,476.74	$ 39,380.40	$ 14,903.66	37.85%

NOTE: It is important to look at both the lowest margin items and the highest margin items so that you can determine if the margins are accurate. The margins listed on the report are calculated using the average cost (of the product currently on hand) and using the net sales price (the amount that was charged at the register).

Often the very high margins (over 80%) are the result of a wrong average cost, or a zero average cost which can be the result of receiving errors. High margins are also possible from receiving free product, receiving credits for invoices that haven't been received, or from invoices that haven't been received in general.

Low margins can also result from receiving errors but there are instances where the cost is correct but the net sales price is lower due to discounts (case, employee, Scott, etc.) applied at the register. In this situation, the margin is accurate and does not need fixing.

Over Under Margin Analysis Checklist

Analyzing the High On Hand Report (for on hand totals above 100)

- [ ] Reveiewed report for items not currently in your department
- [ ] Noted items that have high on hand totals due to possible cashier/plu errors
- [ ] Noted items that have high on hand totals due to possible vendor item ID/Catapult errors
- [ ] Reviewed "Average Cost" column to be sure there are no cost or quantity receiving issues

Analyzing the Low On Hand Report (for on hand totals that are negative)

- [ ] Reveiewed report for items not currently in your department
- [ ] Noted items that have low on hand totals due to possible cashier/plu errors
- [ ] Noted items that have low on hand totals due to possible vendor item ID/Catapult errors
- [ ] Reviewed "Average Cost" column to be sure there are no cost or quantity receiving issues

Analyzing the Maring Percentage Report

- [ ] Reviewed high margin percent items (80-100% margin) to determine possible misrings and/or receiving issues
- [ ] Reviewed the low margin percent items (20%-negative) to determine possible misrings and/or receiving issues
- [ ] Reviewed "Average Cost" column for all items to be sure there are no cost or quantity receiving issues

After Analysis

- [ ] Compiled a list of items with on hand totals that need to be fixed
- [ ] Contacted Alvin regarding items that might have possible Average Cost (contact through Email),
in addtion to any PLU or Vendor Item ID issues (use the Form)
- [ ] Contacted Soren regarding items that might have possible Margin Percentage issues
- [ ] All issues fixed before Sunday evening

Fixing On Hand Totals In Catapult Using the "Physical Inventory" Worksheet

On-Hand Totals in Catapult

It is now the responsibility of the Produce Manager to correct any On-Hand total issues. It is important for the Produce Managers to review the weekly on-hand total reports for items that have inventory totals that seem too low or too high based on the amount of product you currently have in your department.

For example: If your On-Hand report stated that you had 250 lbs of Red Delicious apples in your department, but there is only 1 case on your tables and no cases in back stock, this is an item that will need to be adjusted.

Another example: If your On-Hand report stated that you had -150 lbs of White Grapefruit, but White Grapefruit was not available during this time (or White Grapefruit was not brought into your department), this is an item that will need to be adjusted.

NOTE: These items will need to be fixed in Catapult every week, no later than Sunday night. It is important to take care of issues as they arise so that the On-Hand totals in Catapult are accurate for Inventory and Accounting purposes.

Also remember that you should not fix any On-Hand totals while the store is open. Adjusting these totals while the store is open and sales are being rung through the registers creates possible conflict with Catapult reports. Please restrict On-Hand total corrections to hours before 9 am and after 9 pm.

Fixing On-Hand Totals in Catapult

To fix any item that is too high in Catapult (like the Red Delicious Apple example above), you must take inventory of that item, which must happen before the store opens (before 8 am) or after the store closes (or after the last customer has finished checking out). Taking inventory on these items is to be done in exactly the same way as the Period Inventory.

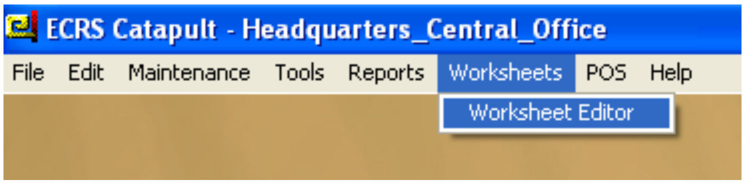
Fixing items that have negative On-Hand totals (as in the White Grapefruit example), you do not need to take inventory. Issues with negative on-hand totals are most often due to an item being received correctly, but sold incorrectly. For Example: if CA Grapefruit were received into catapult, but they were displayed and/or sold as White Grapefruit. It is important to always sell the item as it is received. This is mandatory for all items, such as Grapefruit, FL and CA Navel Oranges, FL and CA Valencia Oranges, All Apples, etc.

Since you will be running these reports and fixing the On-Hand totals on a weekly basis, there should be very few items that need correction from week to week. It is also important to follow all proper invoice receiving procedures, since the majority of the On-Hand total errors are made when receiving invoices into catapult. If you have questions or concerns about receiving invoices, please contact a member of the Regional Produce Support staff for assistance.

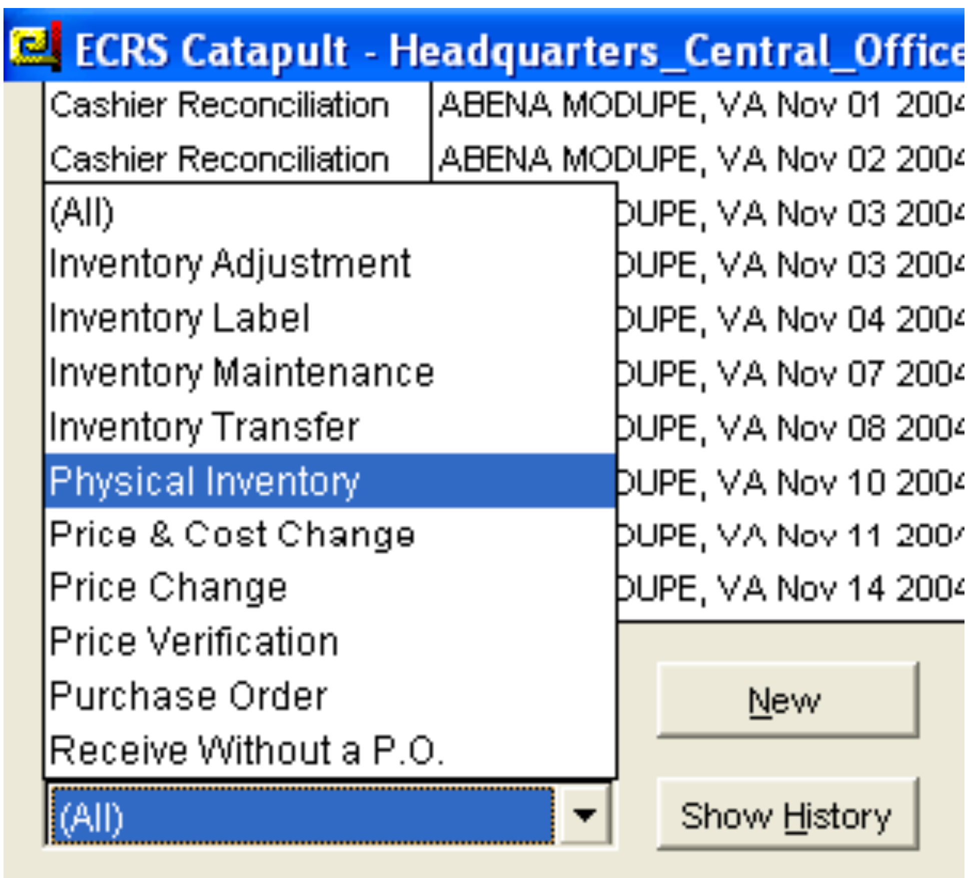
After you have taken inventory on the items that need to be corrected, you will now create a Physical Inventory Worksheet in catapult.

Creating a Physical Inventory Worksheet in Catapult

1. To create the Physical Inventory worksheet, open and log in to Catapult. Click "Worksheets" at the top of the screen.



2. Next, a screen will appear that allows you to select the type of worksheet you wish to create. Normally, you would use this screen to create a price change worksheet. For this purpose you will create a "Physical Inventory." Using the drop down menu at the bottom of the screen, locate and select "Physical Inventory Worksheet"



and then click the “new” button to create this worksheet.

3. Next, you must name your worksheet to signify you are making an inventory adjustment. It is important that all worksheets **must** be typed in the following format:

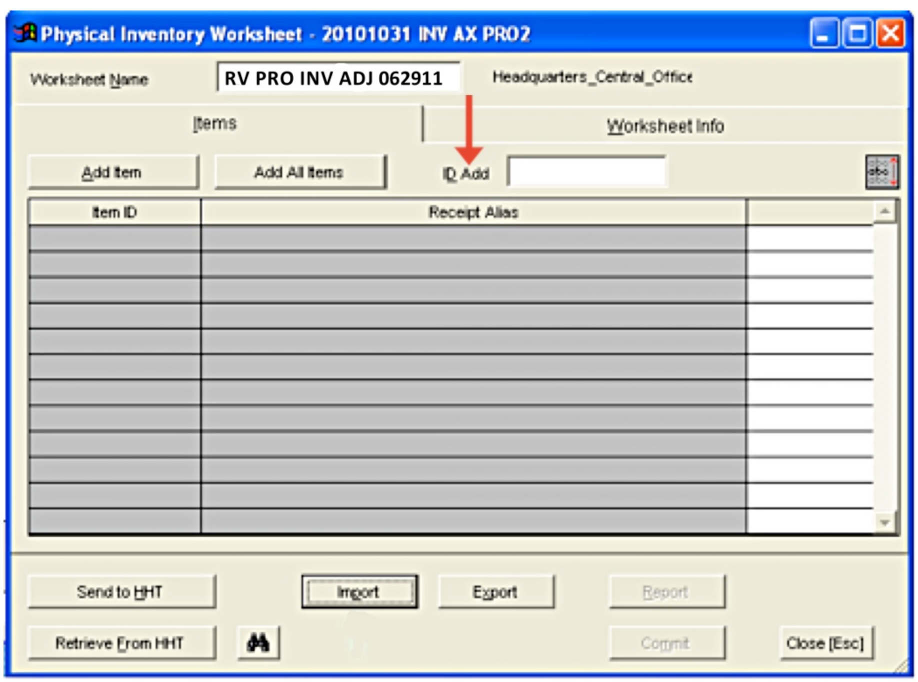
Store Initials > PRO INV ADJ > Date.
For Example: a Rockville Physical Inventory Worksheet for 6/29/2012 would be labeled: **RV PRO INV ADJ 062912**

Again – **ALL WORKSHEETS MUST BE SAVED IN THIS FORMAT.**

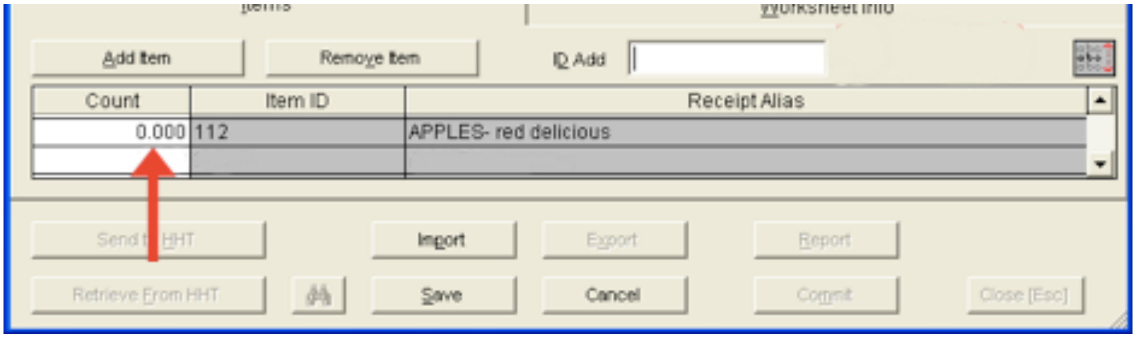
Adding Items to the Physical Inventory Worksheet

This process is similar to the Period Inventory, except that you will not need to add all items to this worksheet. Please remember to only add the items that you are adjusting.

To enter your new item Totals, use the “ID ADD” box in the Physical Inventory Worksheet:



After you add your items, enter the correct weights in the “Count” Column:



When you are finished adding items:

- Be sure your Count totals are correct. These will be your new On-Hand totals in Catapult.
- After you are certain all of the information in this worksheet is accurate, click “Save.
- And after you have saved this worksheet, click “Commit.” Again, only commit this worksheet once you are certain your totals are correct.
- At this time, it is not necessary to run a report for this worksheet. However, you may want to save a copy of this worksheet for your records to track any potential receiving issues.

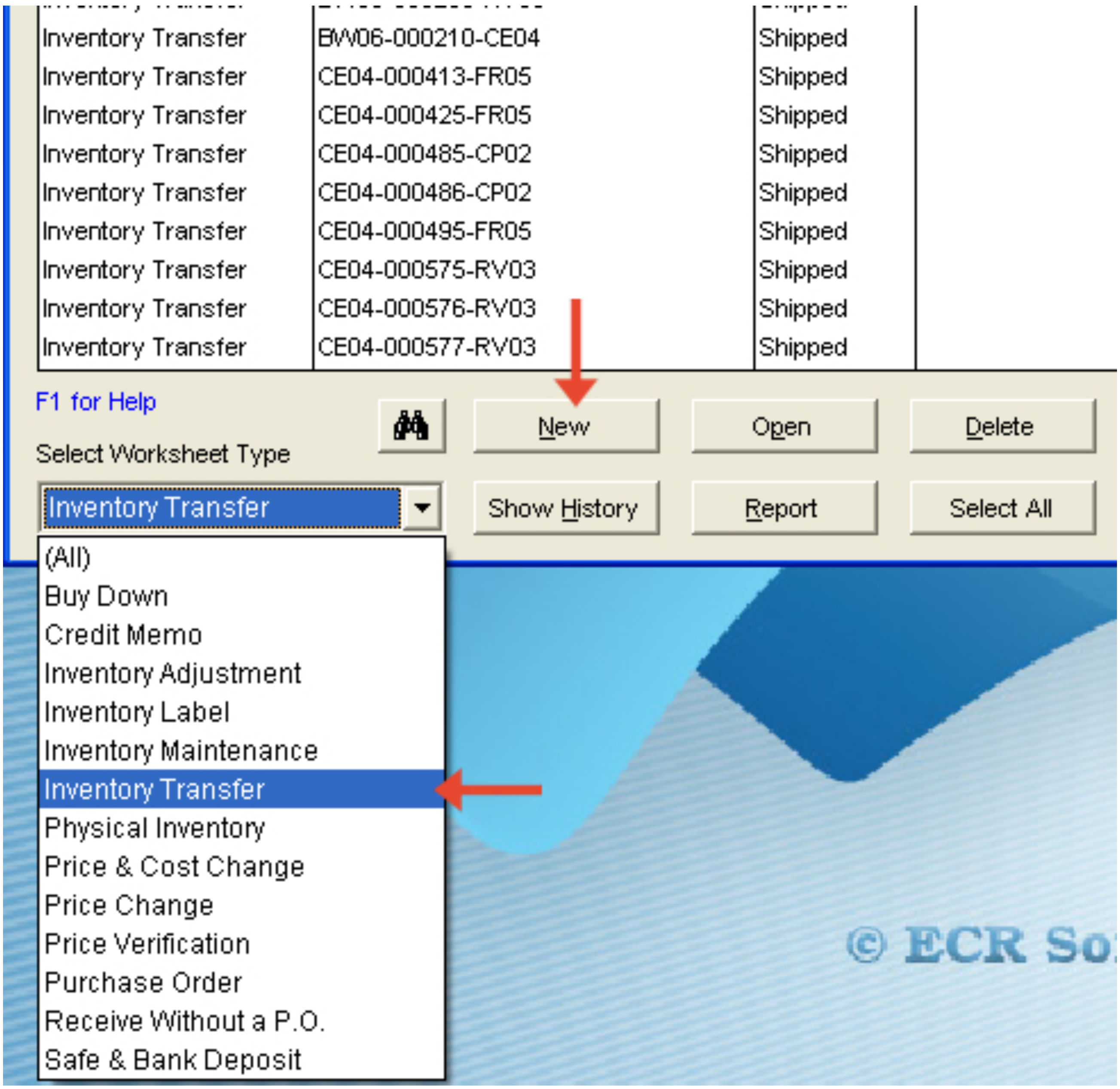
Creating an Inventory Transfer Worksheet in Catapult

Inventory transfers are created to account for product being shared between stores, and for any regional produce deliveries (mostly local). To be sure Catapult has a record of these transfers, both the department sending the transfer and the department receiving the transfer must create Inventory Transfer Worksheets in Catapult.

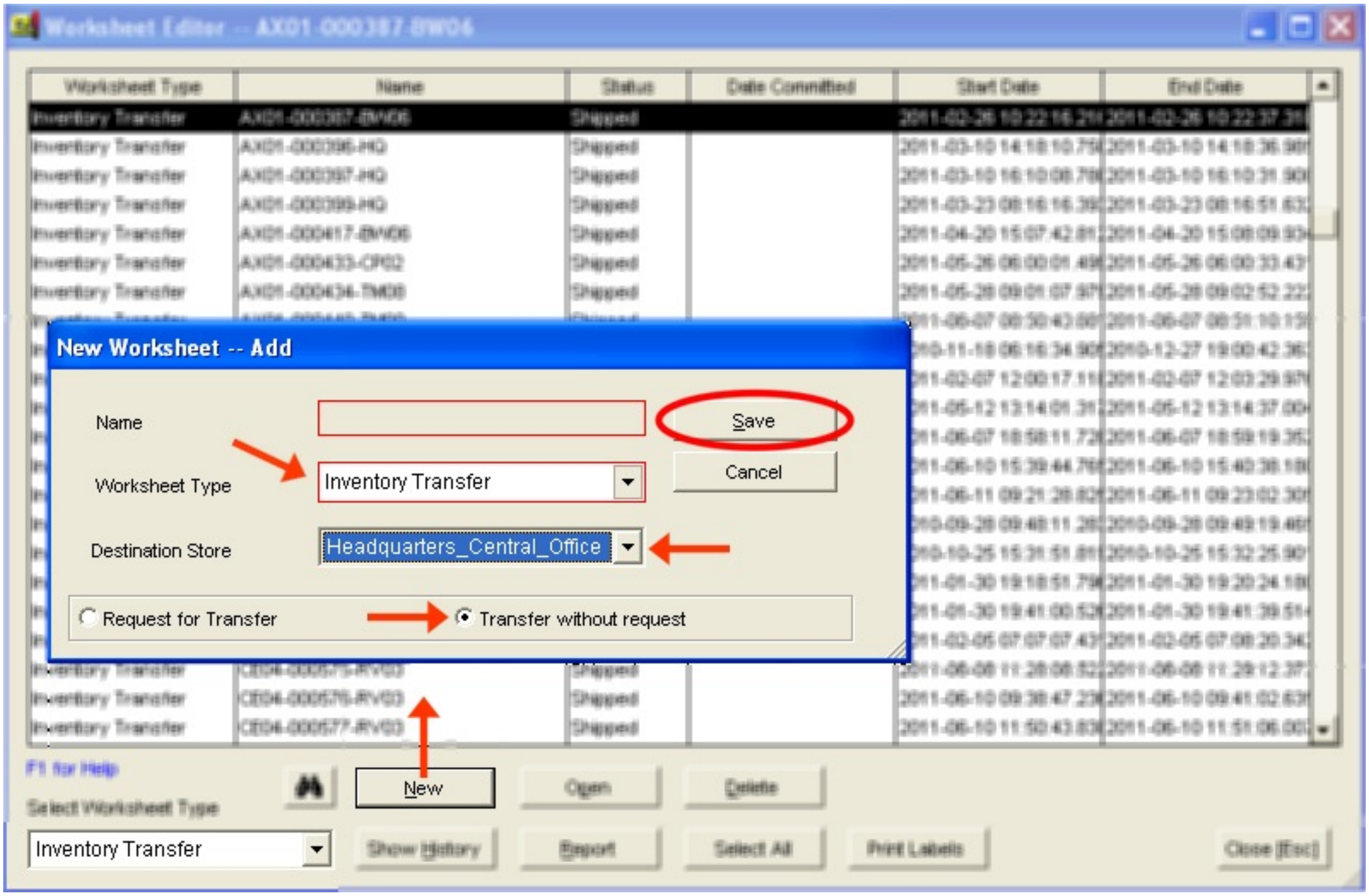
To Create an Inventory Transfer Worksheet:

(The following instructions are for Transferring items out of your department. Instructions for receiving a transfer are located after step 18 of these instructions)

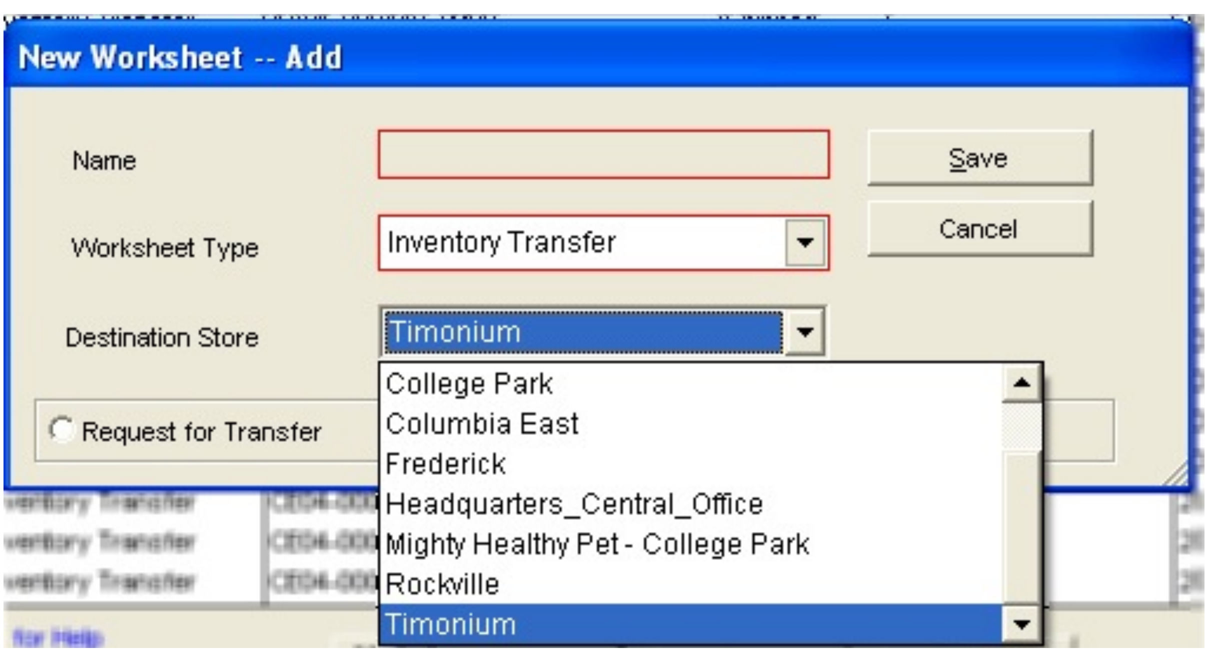
1. In Catapult, Select "Worksheets" from the top of the screen.
2. Using the drop down menu at the bottom of the "Worksheet Editor" screen, find and select "Inventory Transfer"



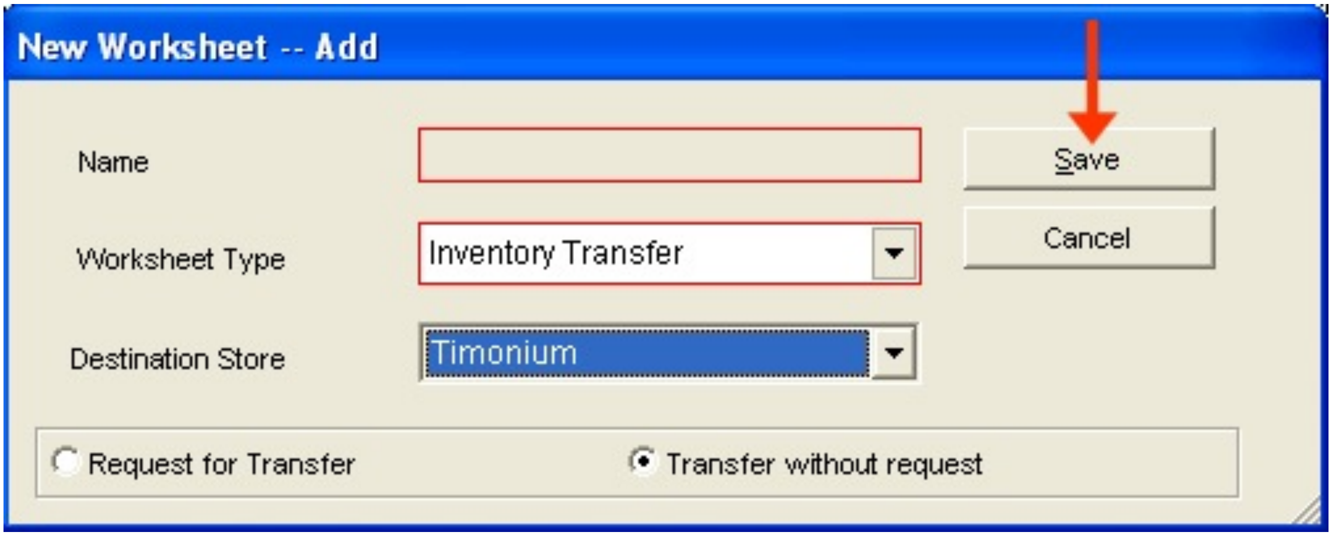
3. Next, you will be prompted to enter information for your worksheet. Be sure the “Worksheet Type” is listed as Inventory Transfer.
4. Click the down arrow to the right of the “Destination Store” box.



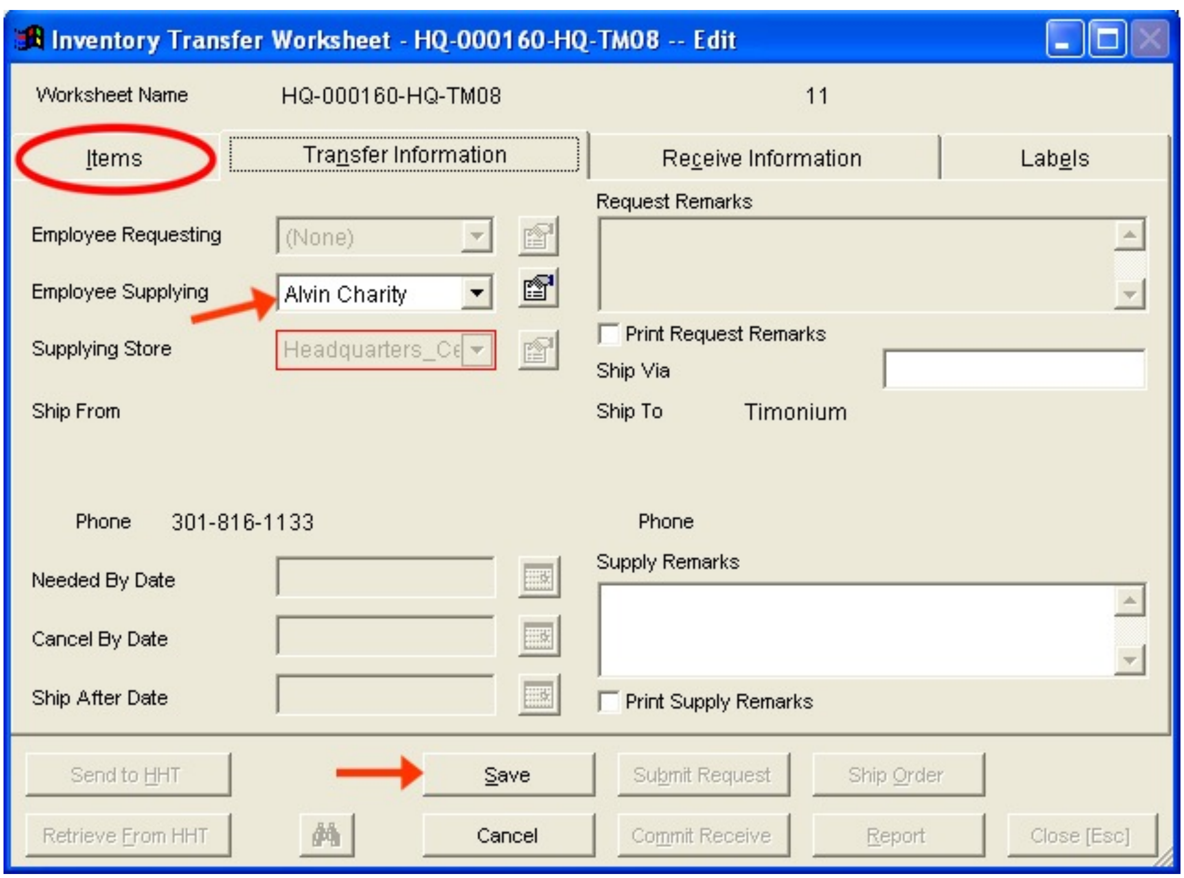
5. From the options listed in this menu, select the store that will be receiving items from your department.



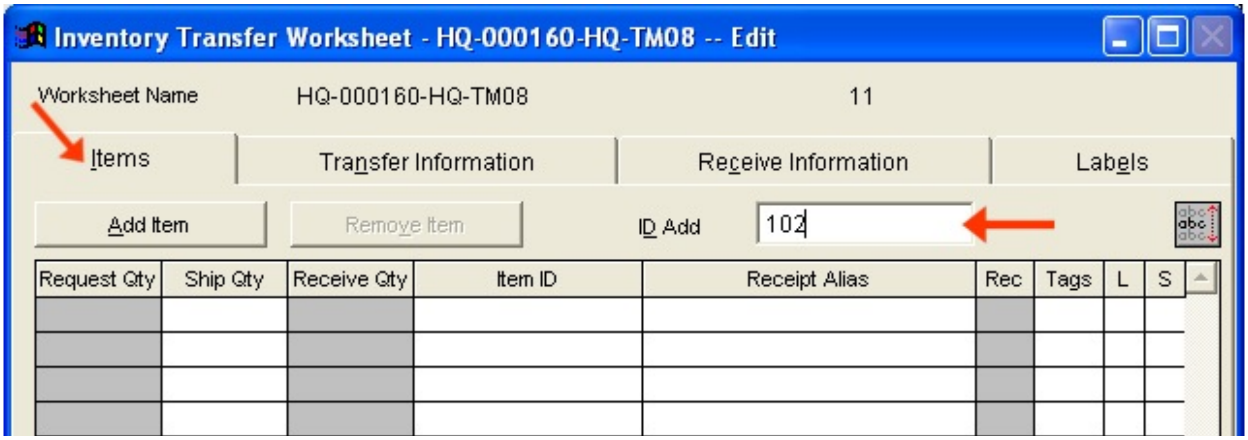
6. Once you have selected a Destination Store, click “Save.”



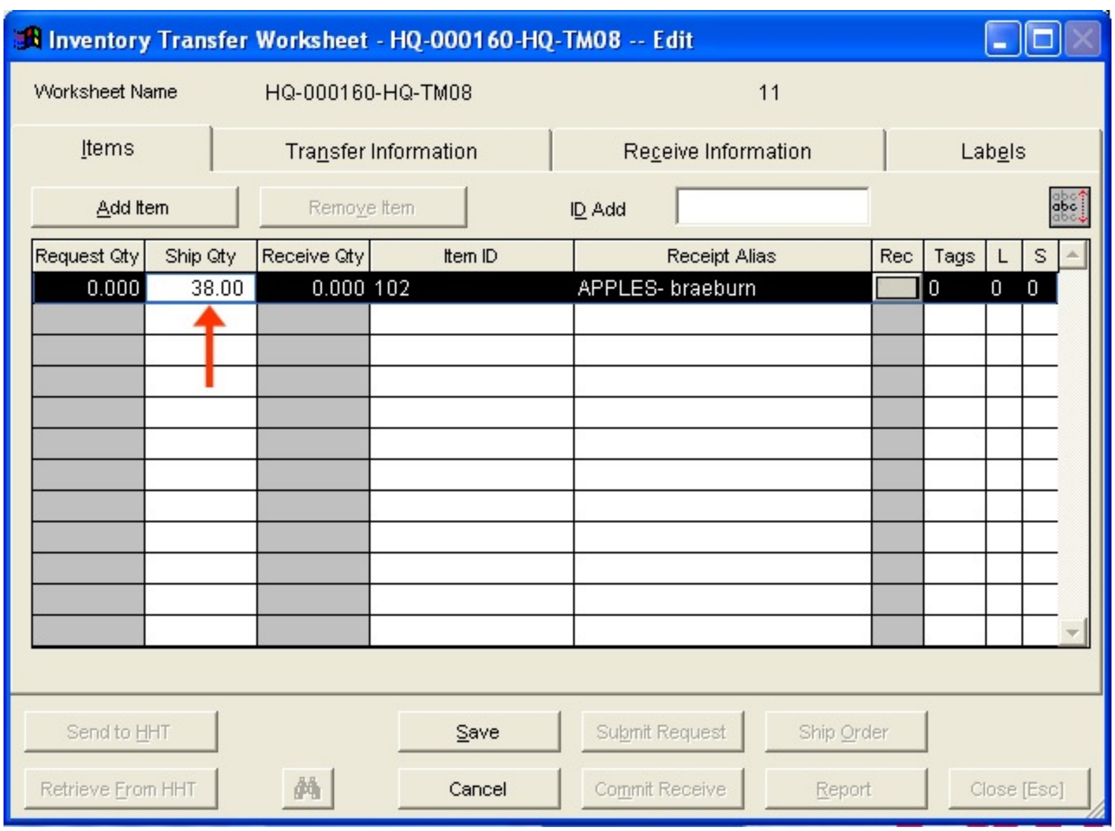
7. A new window will appear, allowing you to edit “Transfer Information.”
8. If you are sending items to another store, be sure that the “Employee Supplying” and “Supplying Store” boxes have the correct information.
9. Be sure to enter the Vendor and Invoice Number into the “Supply Remarks” box.
10. Next, click the “Items” tab, located next to the “Transfer Information” tab at the top of the screen.



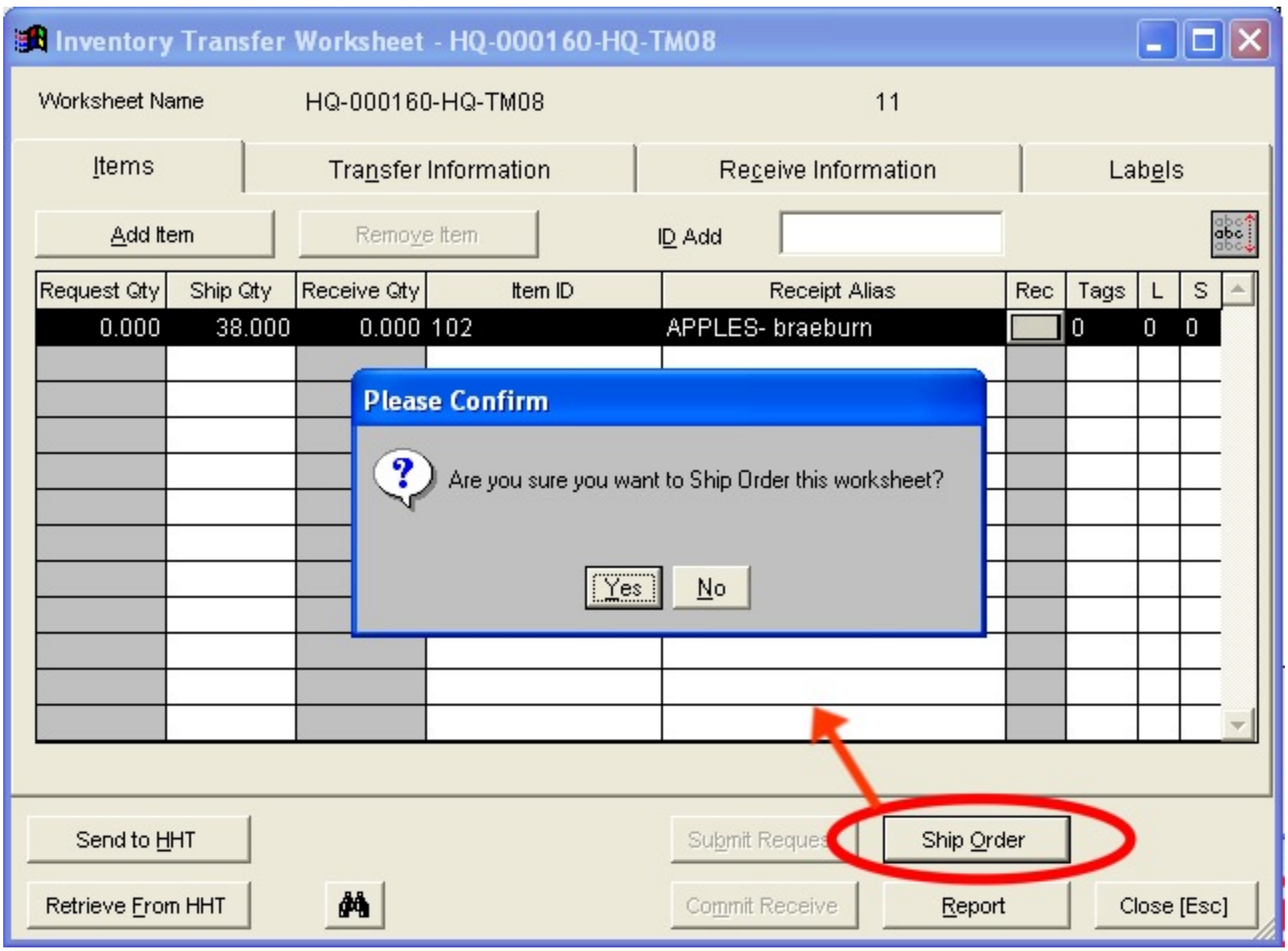
11. In the “Items” screen, you can now begin entering the items you wish to transfer. Using the “ID Add” box, you can enter the PLU or UPC of any produce item in Catapult.
12. Enter the PLU or UPC of the item, and press the Enter button on your keyboard.



13. Your Item will appear on the worksheet.
14. Next, enter the amount of the item you are transferring in the column marked “Ship Qty.”



15. If you are transferring more than one item to the same store, return to the "ID Add" box and continue to enter items.
16. When you are finished entering items, Save the worksheet.
17. After Saving, be sure to review the worksheet to be sure the item names and transfer totals are correct. Once you have reviewed this information, click "Ship Order."
18. A confirmation screen will appear asking if you are sure you want to Ship Order. Click Yes.



If you are receiving a transfer from another store:

1. When the transfer is "Shipped" from the supplying store, Catapult will send the file to your store (the "Destination" store). **This can take up to two (2) days to happen** – if RV creates a sheet on 8/23, it may not appear in the Destination store until 8/25.
2. If you are the Destination store, please do the following to find the inventory Transfer:
   a. In Catapult, click "Worksheets" at the top of the screen
   b. A new screen will appear. Using the drop-down menu at the bottom of the screen, choose "Inventory Transfer"
   c. After you have selected "Inventory Transfer" you can scroll through the worksheet names to find the one assigned to the items you have received. The easiest way to do this is to request the worksheet name from the supplying store.
   d. For Example: If BW is receiving items from RV, RV will create the Inventory Transfer worksheet and email the Produce Manager in BW the name of the worksheet. The following day, BW can use this worksheet name to find the Inventory Transfer In Catapult.
   e. Open the Inventory Transfer once it has been located.
   f. In the "Items" tab, locate the column marked "Received Qty"
   g. Enter all received totals in this column.

      IMPORTANT: Please be sure to enter totals for all items on the Inventory Transfer. If the transfer has items that you did not receive, simply leave the Receive Qty at "0". If you commit a worksheet without entering totals, you will not receive the items into your department.

      Additionally, the items will have already been taken from the supplying store, which may cause issues in Catapult at the end of the Period. As with any Catapult worksheet, double check all information before the worksheet is committed.

   h. After you have entered all quantities in the "Receive Qty" column, be sure all totals are correct.
   i. You may now commit the Inventory Transfer. At this point, the item quantities will begin to transfer into your department. This process may take up to 1 day to complete.
   j. That's it. At this point it is not mandatory to run a report, but you may want to have a copy for your records.

Please Remember the Following:

If you are transferring items out of your department, remember to add the total cost of the items to your Margin Tracking sheet, in the "Transfers Out" column, which is located in the "Credits" section.

If you are receiving a transfer, be sure to include the total cost in the "Transfers In" column, on your Margin Tracking sheet, which is located in the "Vendors" section.

Checking inventory transfers is an extremely important aspect of managing your purchases, so **all inventory transfers should be committed on a weekly basis**, and **there should never be outstanding transfers in catapult after the period ends.**

Inventory Adjustment Worksheet in Catapult

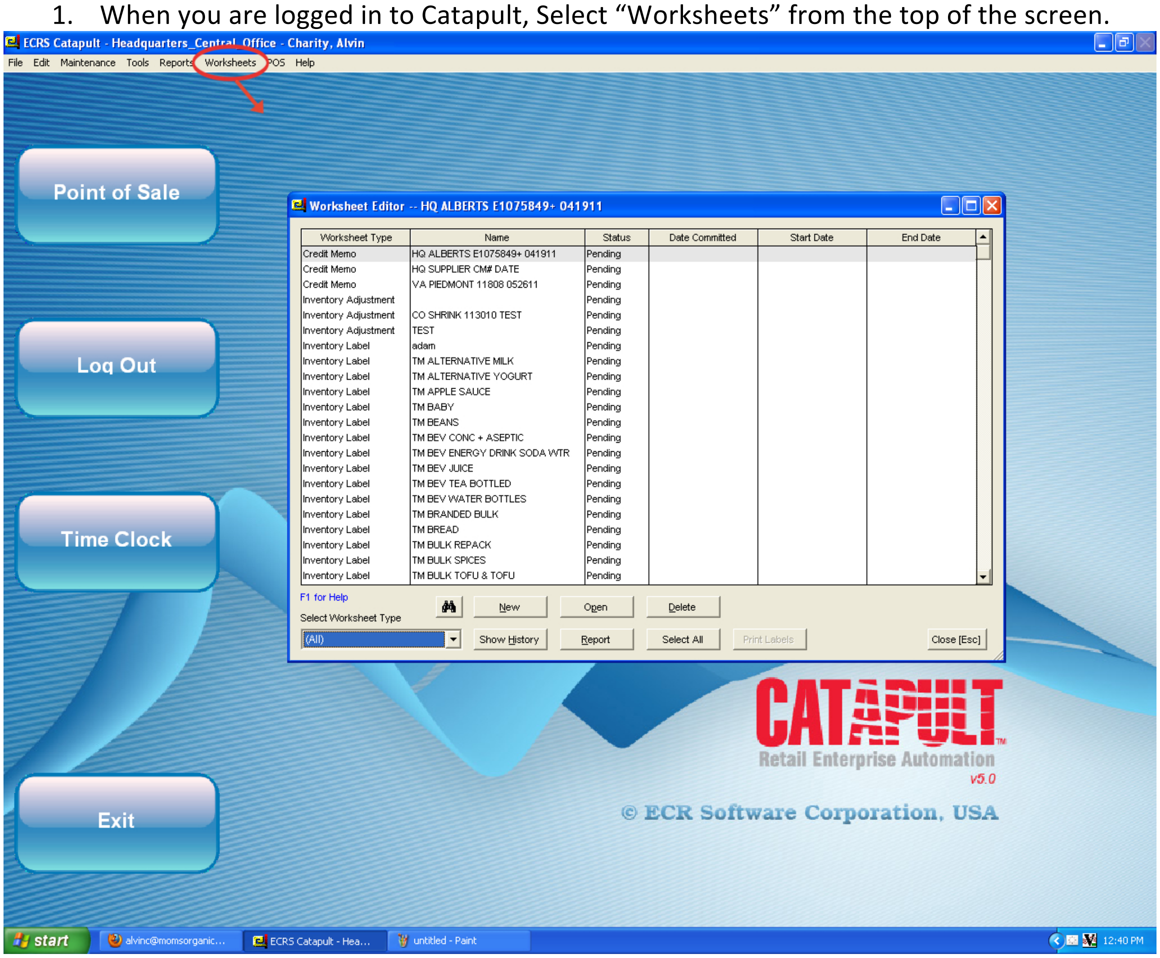
In the Produce Department, the Inventory Adjustment Worksheet will primarily be used to account for Donations requested for special events. A Store Manager or Central Office Employee will contact the Produce Manager about donating product ahead of time, and donations should be ordered a few days before the event to ensure we are providing a high quality product.

All donations are to be received into Catapult with any regular orders, meaning if the donation came in on an invoice that had a typical order for your department, you will receive the invoice as you would normally.

In order for Catapult to adjust your totals for the donation, you must create an Inventory Adjustment Worksheet.

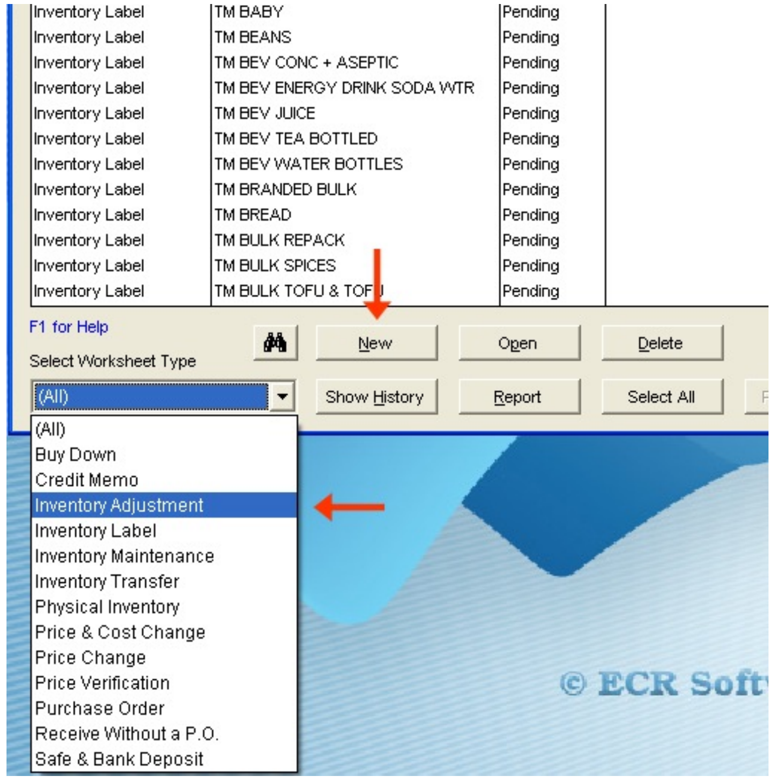
To create an Inventory Adjustment Worksheet:

1. When you are logged in to Catapult, Select "Worksheets" from the top of the screen.



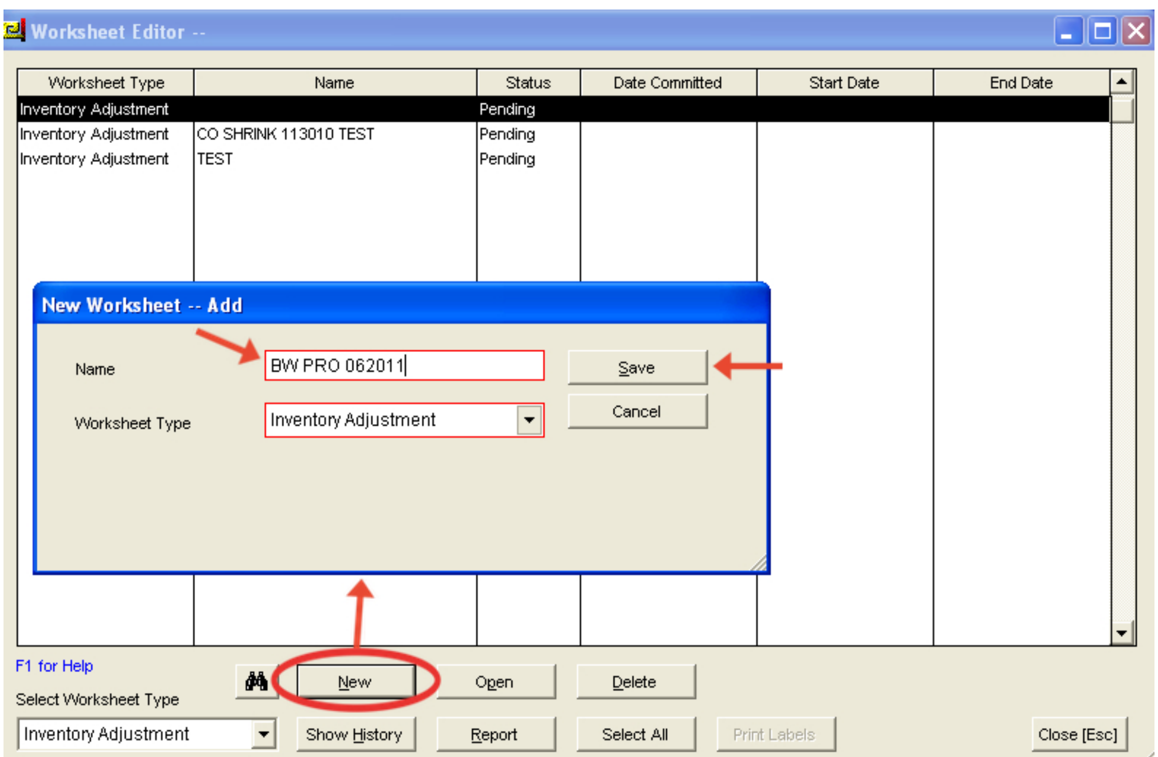
3. When the “Worksheet Editor” window appears, use the drop-down menu at the bottom of the window to find “Inventory Adjustment.”

4. Select “Inventory Adjustment” and click “New” to create a new Inventory Adjustment Worksheet.

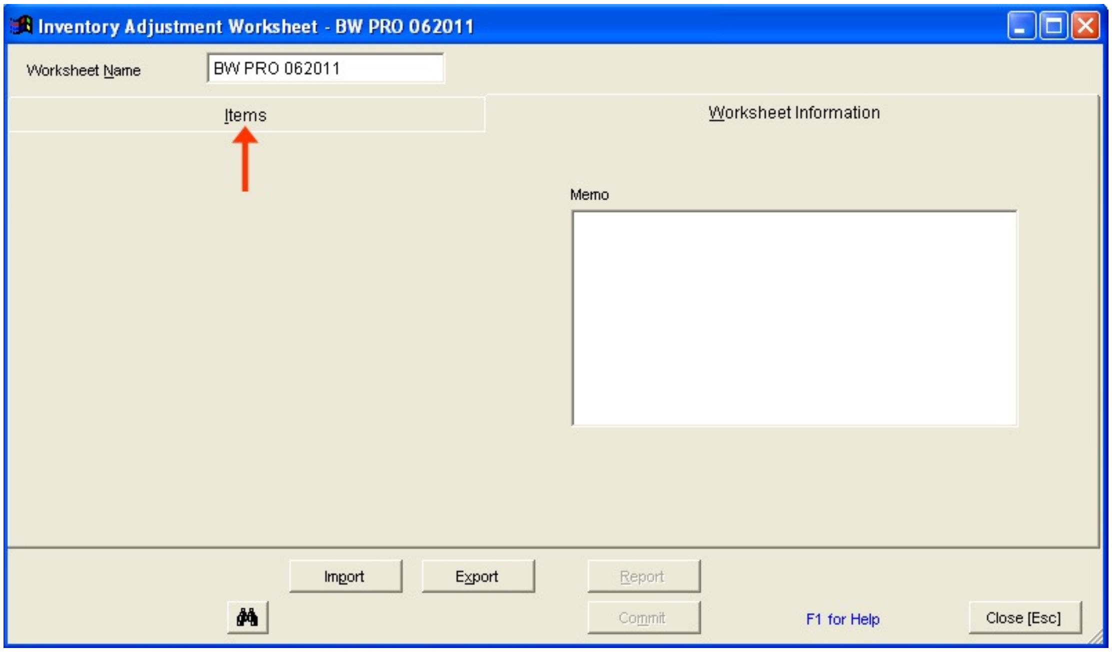


5. A new window will appear, allowing you to enter a worksheet name. All Inventory Adjustment Worksheets should be titled in the following format: **Store Initials > PRO > Date**. For Example, a Bowie Inventory Adjustment Worksheet for 6/20/2011 should be titled **BW PRO 062011**.

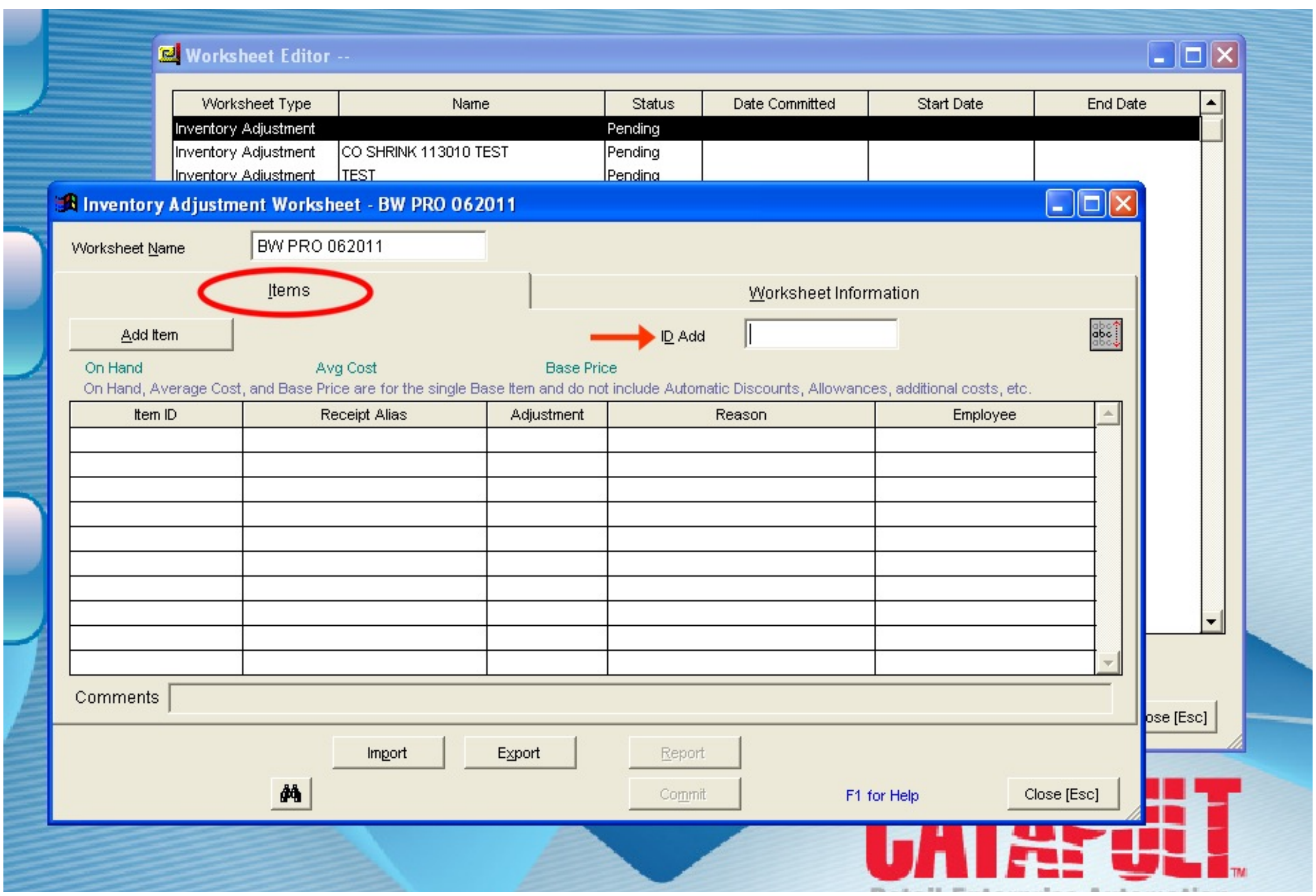
6. Click “Save” when you have finished entering the worksheet title.



7. A new screen will appear with tabs titled "Items" and "Worksheet Information." Select the tab marked "Items".

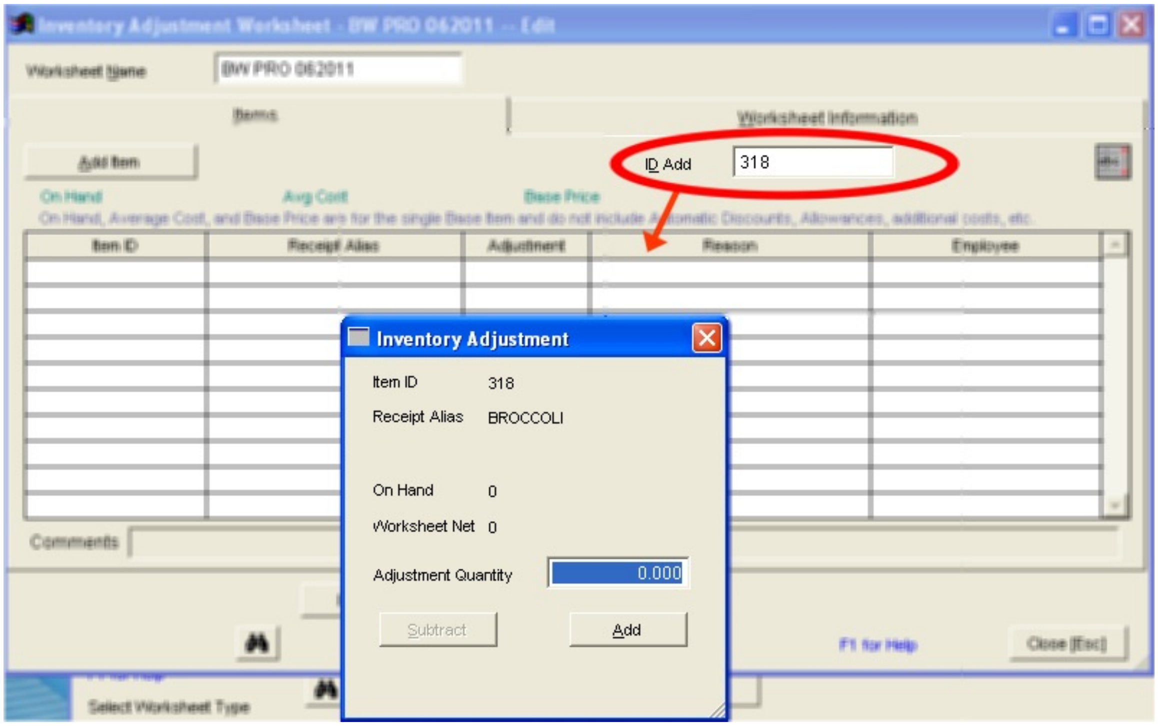


8. You will now have the opportunity to add items to your worksheet. To begin, Use the "ID Add" box located towards the top of the window.

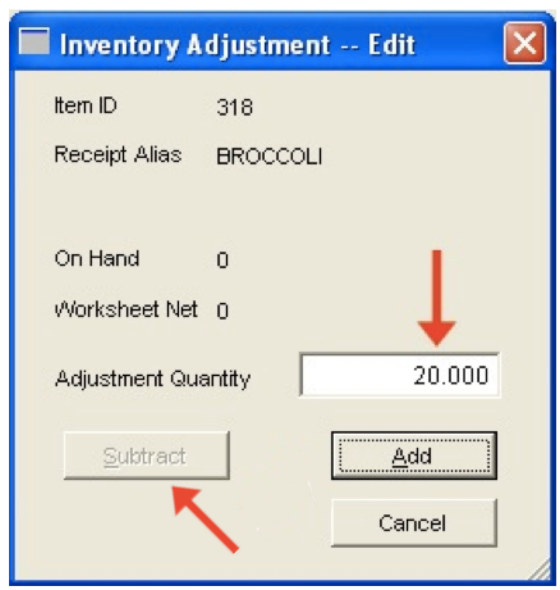


9. Enter the PLU or UPC code for the item you are donating.

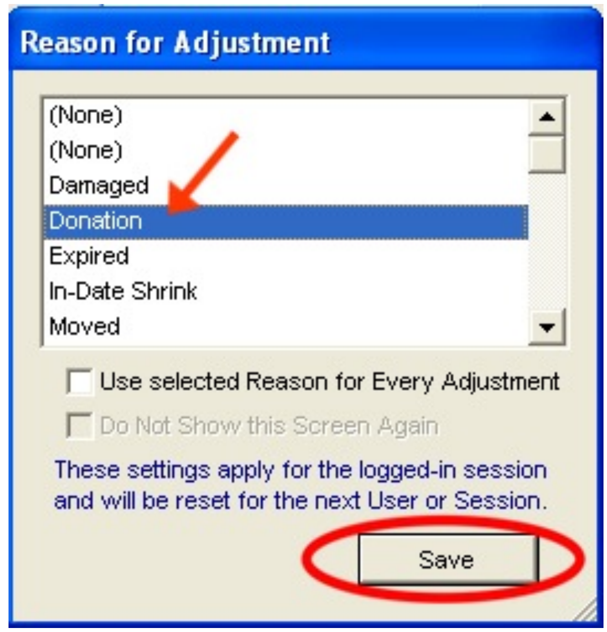
10. A new window will appear, allowing you to enter the total amount of the item you are donating.



11. In the "Adjustment Quantity" box, enter the total amount of your donation. Remember that you must enter this total using the same units that we sell them – For Example, If 1 case of Gala Apples was being donated, enter "38.00" OR, If 1 case of Broccoli was being donated, enter "20.00."



13. After you click "Subtract" a new window will appear. Here you will enter the reason for your Inventory Adjustment. Find and Select "Donation." Then click "Save."



> **NOTE:** At this time, <u>we are not</u> using the Inventory Adjustment Worksheet to enter Expired Items, Shrink Items, or Damaged Items. **Please only use this worksheet for Donations ONLY.**
>
> If you have lost product due to power outage or refrigeration issues, **contact the Regional Produce support staff for instructions on how to enter these items into Catapult.**

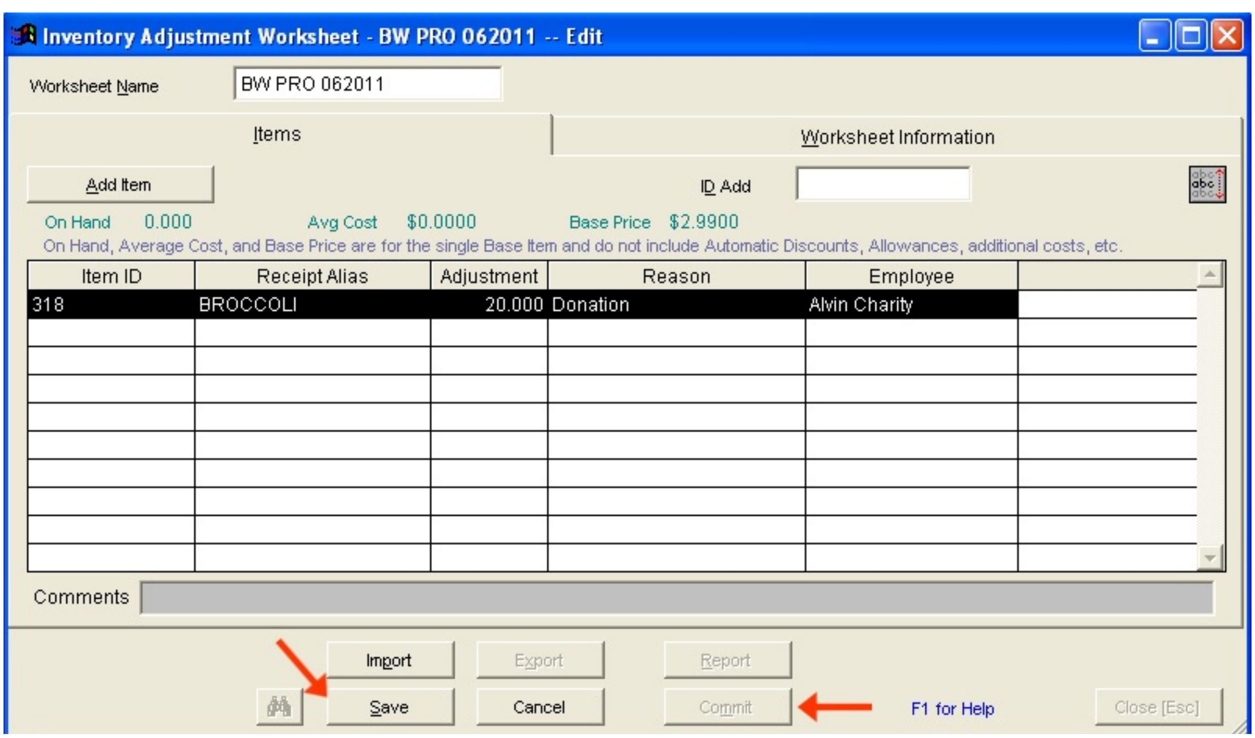
14. After you click "Save" the "Items" window will appear, now containing the item and quantity you are donating. If you are donating additional items, use the "ID Add" box to enter them and follow steps
    10 – 13 above.

15. When you are finished adding items to the worksheet, click "Save."

16. After the worksheet has saved, please review your information to be sure all items and donation totals are correct.

17. When you are certain the worksheet contains accurate information, you may "Commit."

18. When you are prompted, please print a report for this worksheet. This report must be stapled to the original copy of the invoice to be delivered to the Central Office.



How to Read The Produce Vendor Usage Report

Period/Year Tabs

The Produce Vendor Usage report gives Produce Managers a broad view of their purchases from all vendors per period, according the Margin Tracking Sheet from each store.

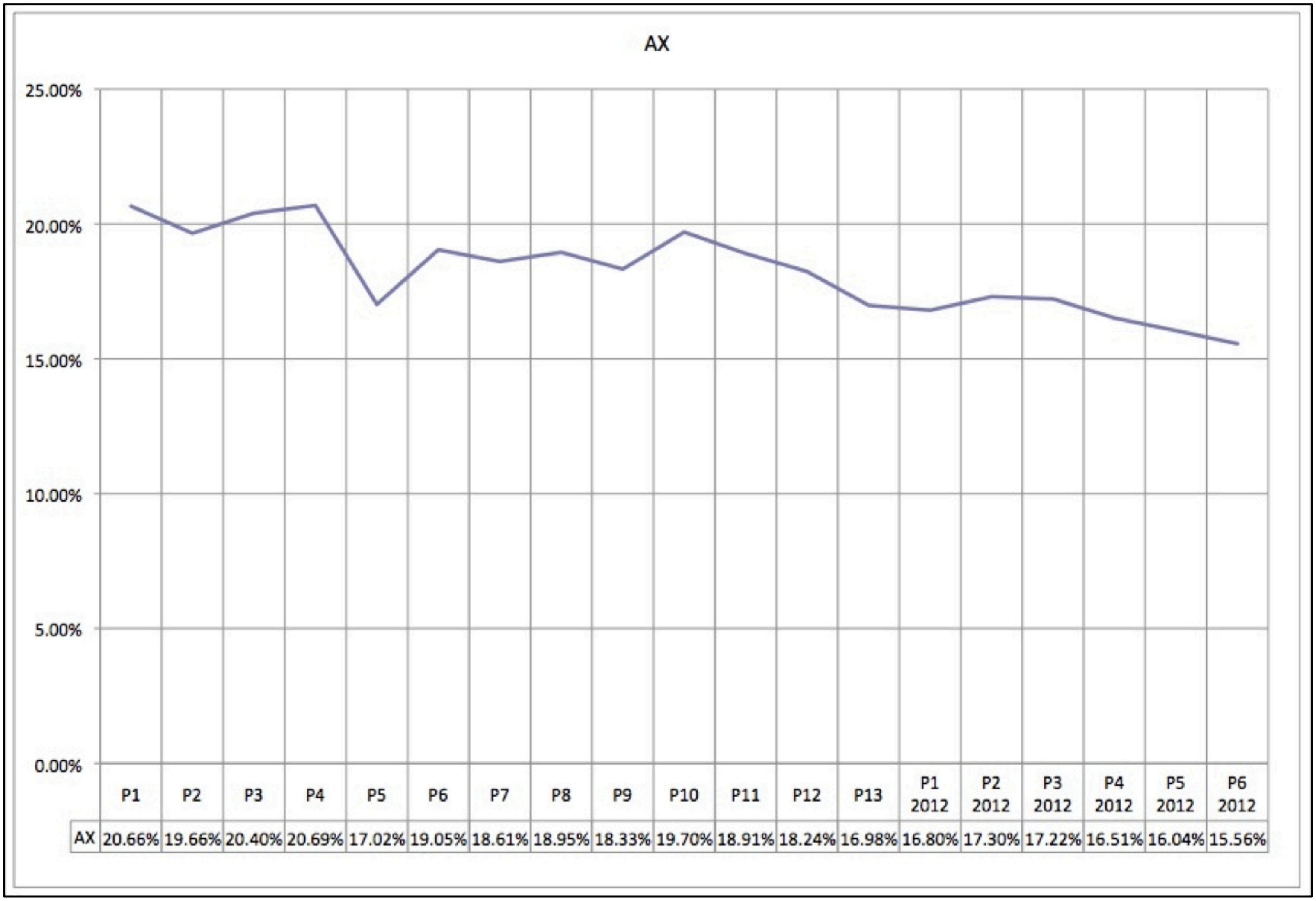
	A	B	C	D	E	P	Q
1	Vendor Usage						
2	Period 5 5/21 - 6/17	AX		BW		TM	
3	Alberts	$16,975.01	13.28%	$15,884.46	21.56%	$10,079.86	11.34%
4	Four Seasons	$97,278.45	76.11%	$45,431.05	61.65%	$68,455.40	77.01%
5	Lancaster	$-	0.00%	$-	0.00%	$320.00	0.36%
6	Coastal	$-	0.00%	$1,064.00	1.44%	$-	0.00%
7	Class Produce	$9,339.95	7.31%	$9,824.75	13.33%	$7,139.10	8.03%
8	TOG	$1,324.00	1.04%	$-	0.00%	$-	0.00%
9	Lancaster Coop	$2,002.67	1.57%	$883.00	1.20%	$-	0.00%
10	Latimore Valley	$-	0.00%	$-	0.00%	$-	0.00%
11	Transfers In	$524.08	0.41%	$602.53	0.82%	$2,153.57	2.42%
12	Other	$373.90	0.29%	$-	0.00%	$739.24	0.83%
13	Other - Local	$-	0.00%	$1,690.26	2.29%	$-	0.00%
15	Total	$127,818.06		$73,689.79		$88,887.17	
16	% of all stores		15.56%		8.97%		10.82%
17							

There is also a total for each vendor located on the far right side of the report. Each vendors percentage of total company purchases (**% of all vendors**), the change in dollar amount of the purchases from the previous period (**$ change over previous period**), and the change in the vendors percentage of total company purchases compared to last period (**change in % from previous period**) are all also detailed in this section of the report.

P	Q	R	S	T	U
TM		Total	% of all vendors	$ change over previous period	change in % from previous period
10,079.86	11.34%	$ 140,193.54	17.07%	$ 146,717.33	2.44%
68,455.40	77.01%	$ 559,180.38	68.07%	$ 387,558.04	-0.50%
$320.00	0.36%	$ 1,012.30	0.12%	$ 6,857.45	-0.39%
$-	0.00%	$ 1,064.00	0.13%	$ 4,077.74	0.02%
$7,139.10	8.03%	$ 95,160.60	11.58%	$ 45,482.89	-1.77%
$-	0.00%	$ 4,959.00	0.60%	$ (86.37)	-0.11%
$-	0.00%	$ 5,726.00	0.70%	$ 2,848.15	-0.05%
$-	0.00%	$ -	0.00%	$ 2,969.88	-0.03%
$2,153.57	2.42%	$ 12,542.92	1.53%	$ 7,212.37	0.78%
$739.24	0.83%	$ 1,614.88	0.20%	$ (356.50)	-0.40%
$-	0.00%	$ 3,773.61	0.46%	$ (4,089.11)	-0.69%
7		$ 821,453.62	100.00%	$ 603,280.98	
	10.82%	100.00%			

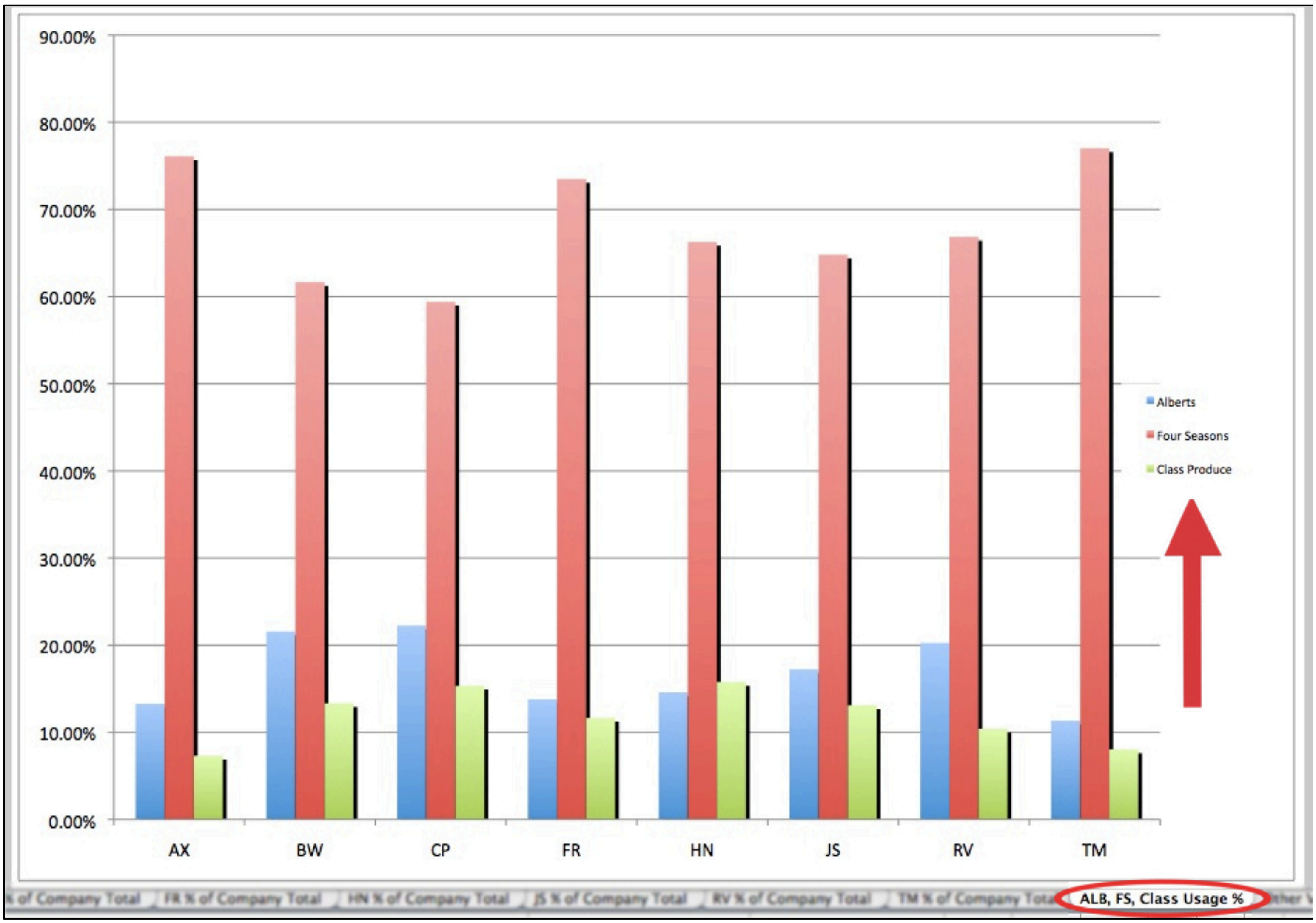
Individual Store Tabs

Each stores purchases are displayed in a period-by-period breakdown over the previous 26 periods (two years). Each store has an individual tab that tracks this data via line graph, and is relatively easy to monitor the high and low purchases by period throughout the year. Using this data, Produce Managers can compare their purchase totals with the totals from other stores (via their tabs), and discuss any patterns with that store, or with the Regional Produce Support staff.



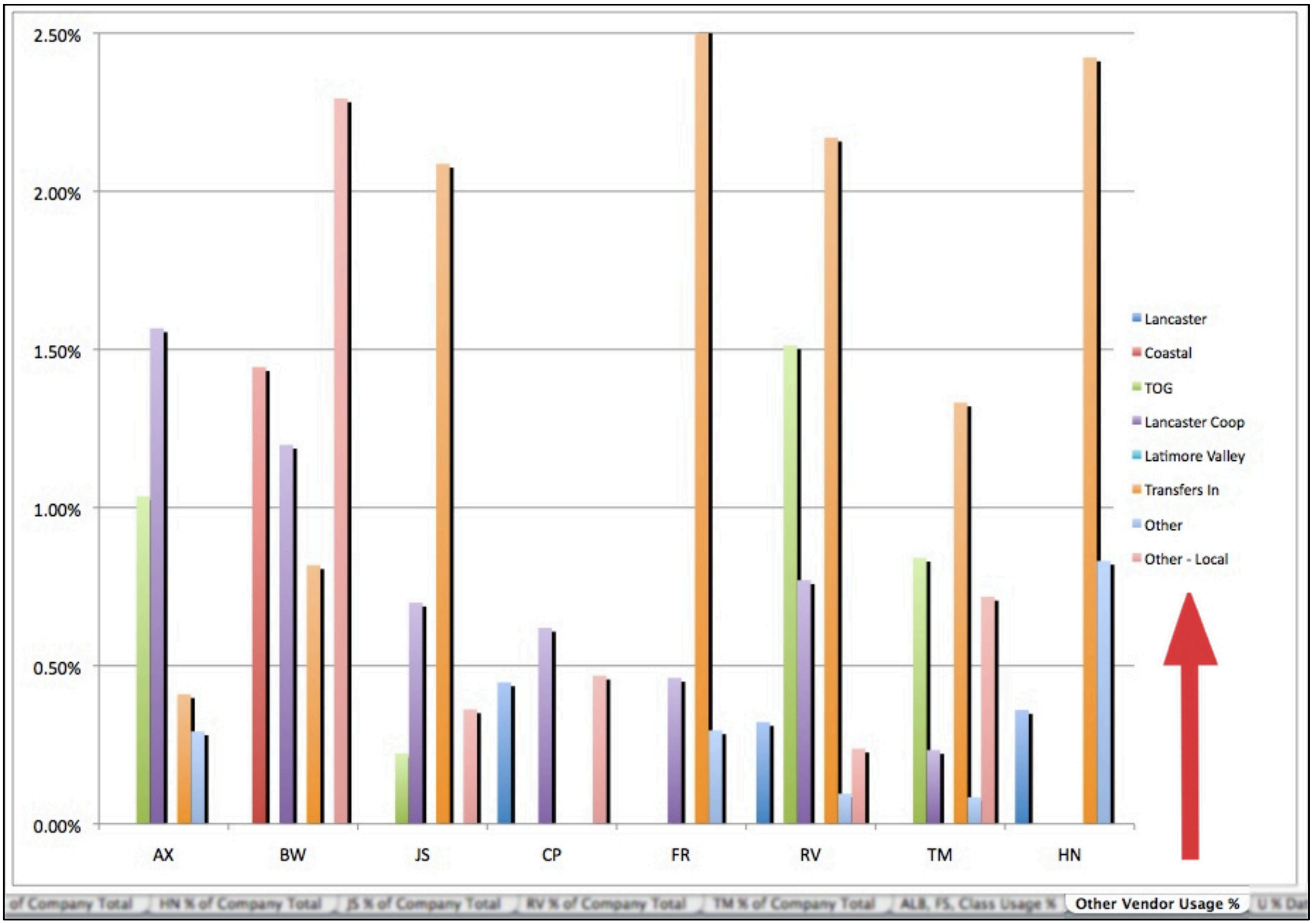
ALB, FS, Class Usage % Tab

The total purchases for each store are broken down in this tab by our three primary vendors. Here again, Produce Managers can compare their purchases from a particular vendor with another store, with the goal of locating patterns and discussing them with other Produce Management and/or Regional Support Staff.



Other Vendor Usage % Tab

The last tab in the Vendor Usage report details each stores total purchases from the lesser-used vendors (Lancaster Foods, Lancaster Co-op, Other Local Vendors, etc). This report should be read and analyzed in the same way as the ALB, FS, Class Usage % Tab.



Receiving Physical Inventory into Catapult

The Physical Inventory worksheets are used to set or reset the current count (on-hand) of product in the store. Therefore numbers entered into the Count column can never be negative but can be zero. Your count should always include:

- **Product in wet and dry backstock**,
- **Product stocked in the produce department**
- **Cross-merchandized product**
- **Any returns that have not been credited to your department.**
- **Any seasonal outdoor displays (plants and soil, winter squash, watermelon bins, etc)**

> **Important Inventory Notes:**
>
> It is mandatory to complete inventory the last day of the 4-week period (which will always be Sunday evening), and not the first day of the new period.
>
> This inventory process should be complete no later than 11 PM on the last day of the period and must be saved into after the store closes.
>
> Produce Managers are responsible for accuracy in counting and entering inventory totals, as well as checking for any and all possible errors.
>
> Produce Mangers do not commit the Physical Inventory Worksheets.

There are three steps to this process:

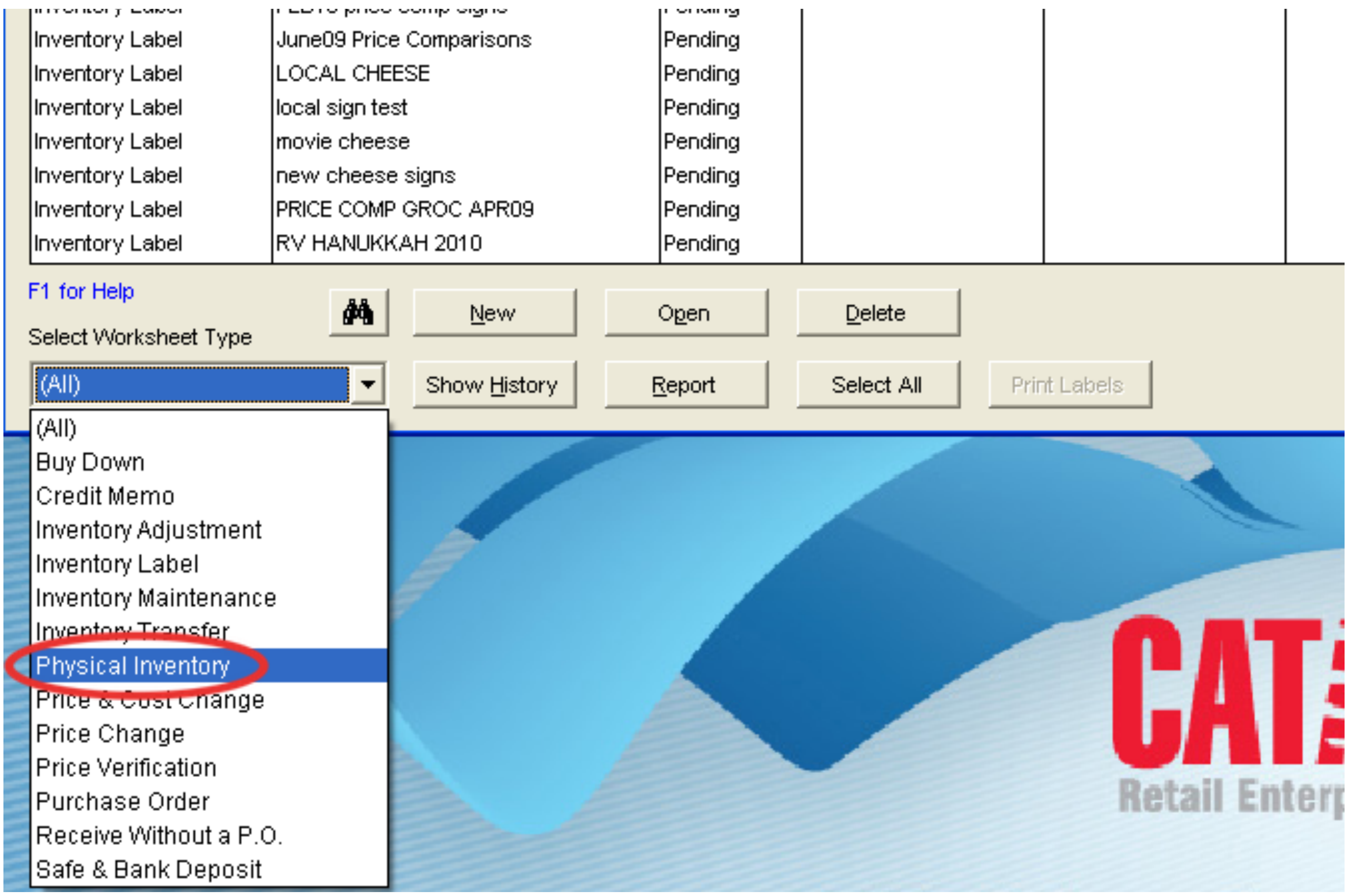
1) **Count all items currently in your department**
    - Use a scale to count items that are sold by the pound. Each department should have a floor scale, but the hanging scale in the produce department and/or the scale at the registers can also be used.
2) **Enter your end of month inventory count totals into catapult**.
    - Entering your end of month inventory into catapult involves entering your inventory totals into **Worksheet 2**, which will also be created by Alvin.
3) **Run the Cost and Retail Value On-Hand report to find your total inventory cost.**
    - This cost will be entered into the consolidated inventory sheet and sent out to Regional Produce Support Staff on the Tuesday following inventory.

Please be aware that each individual UPC and PLU will have to be counted as a separate item. For example: All salads will be counted individually by Brand and Type, so something like an Olivia's Baby Spinach 5 oz clamshell will be counted separately from any other salad clamshells, including other Olivia's varieties.

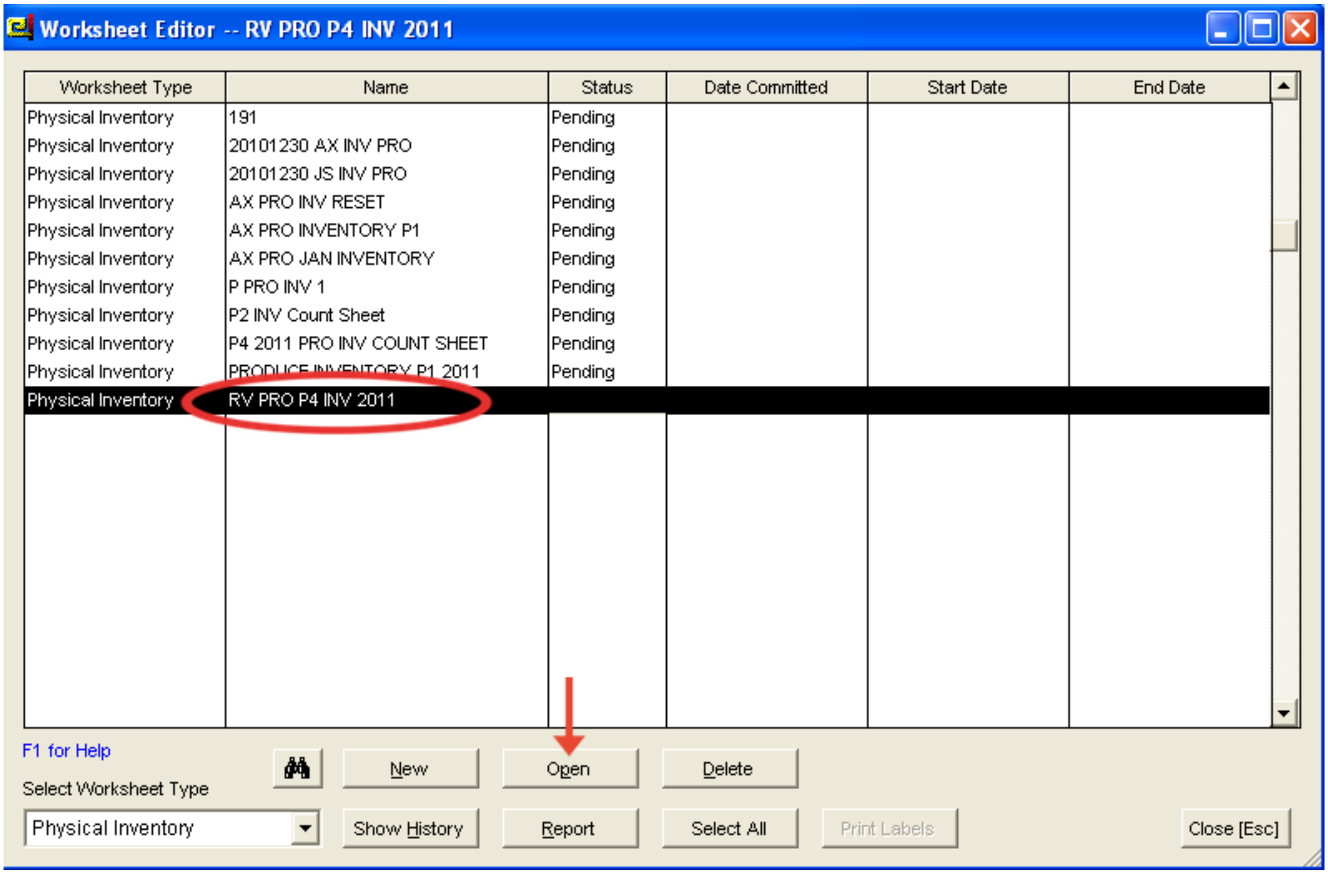
When you finish counting all product and returns in your department:

1. Open and log in to Catapult
2. Click “Worksheets” at the top of the page, select “Worksheet Editor”.

3. A screen will open, allowing you to choose the worksheet type. In the drop down menu at the bottom of the screen, locate and select “Physical Inventory.”



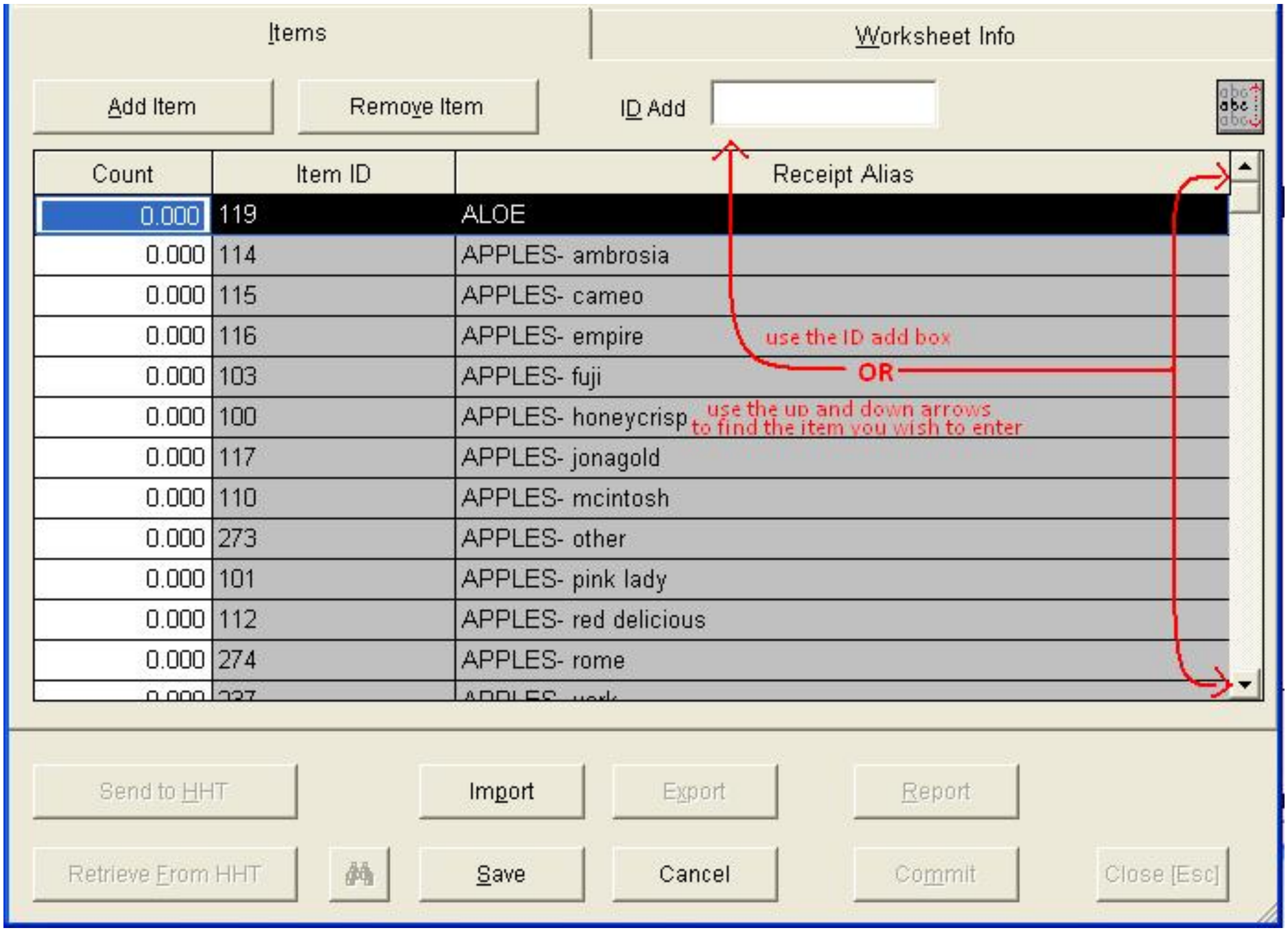
4. In the new window that appears, scroll through the worksheets listed until you find the Physical Inventory Worksheet for produce.
5. These worksheets will always be titled using the following format: **(your store initials) PRO (Period Number) INV 20XX (year)**. (Example – if you are in Rockville for Period 4 inventory, look for the worksheet titled **RV PRO P8 INV 2012.**



6. When you have located the correct worksheet, click "Open" at the bottom of the screen. You are now ready to enter your inventory totals into this worksheet.

To enter your inventory into this worksheet:

1. Scroll through the file to find the item you wish to enter. You may also enter the PLU or UPC of the item in the "ID Add" box located near the top of the screen. The cursor will travel to the item automatically.
    - If the item is not in the worksheet, entering the PLU or UPC will add that item to the worksheet automatically.



2. To enter your inventory count for each item, locate the “Count” column and enter the total volume in the line that corresponds to the item you have just entered. After the count for this item is entered, scroll through the file to find your next item. Or, return to the “ID Add” box and begin entering your next item.

3. Repeat steps **1** and **2** for all items in your physical inventory.
4. When you are finished, check the file to be sure all of the inventory totals are accurate. Also remember to be sure all of the items counted as part of your inventory are in Catapult.
5. If all totals are accurate, save the worksheet.

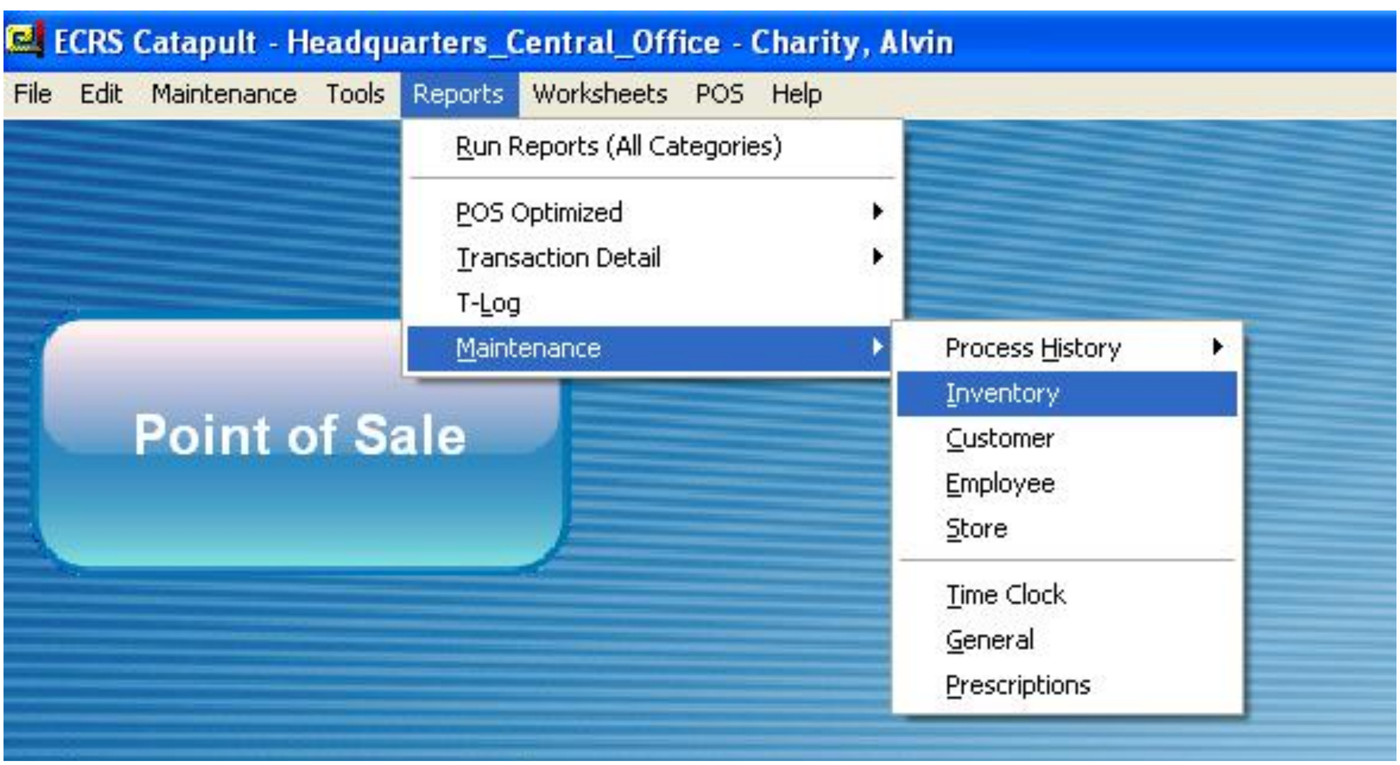
After you have saved the worksheet, you must email Alvin to let him know that you are finished entering your inventory. If you are leaving the store immediately after you finish entering your totals, please have your cell phone on, or provide another way for Alvin to get in touch with you in the event of an emergency. **Please remember to leave your computer on after inventory!**

Running the Cost and Retail Value On-Hand Report

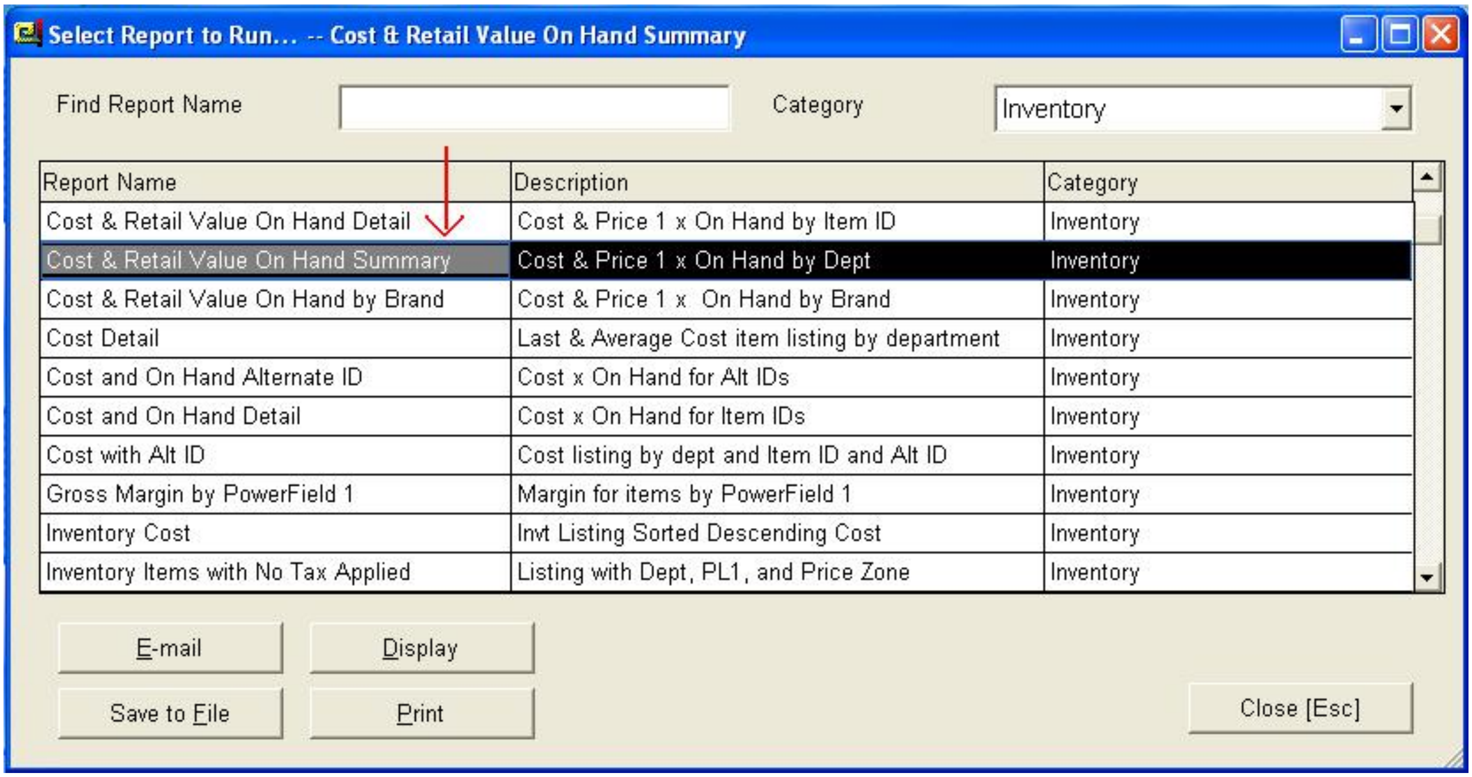
This report will be used to determine the final inventory total for Produce at the end of each period. It is important to use the total from the "Cost" column of this report – this is the total that will be entered into your Consolidated Margin sheets. Remember that all inventory files must be sent out no later than Tuesday immediately after inventory.

To run this report:

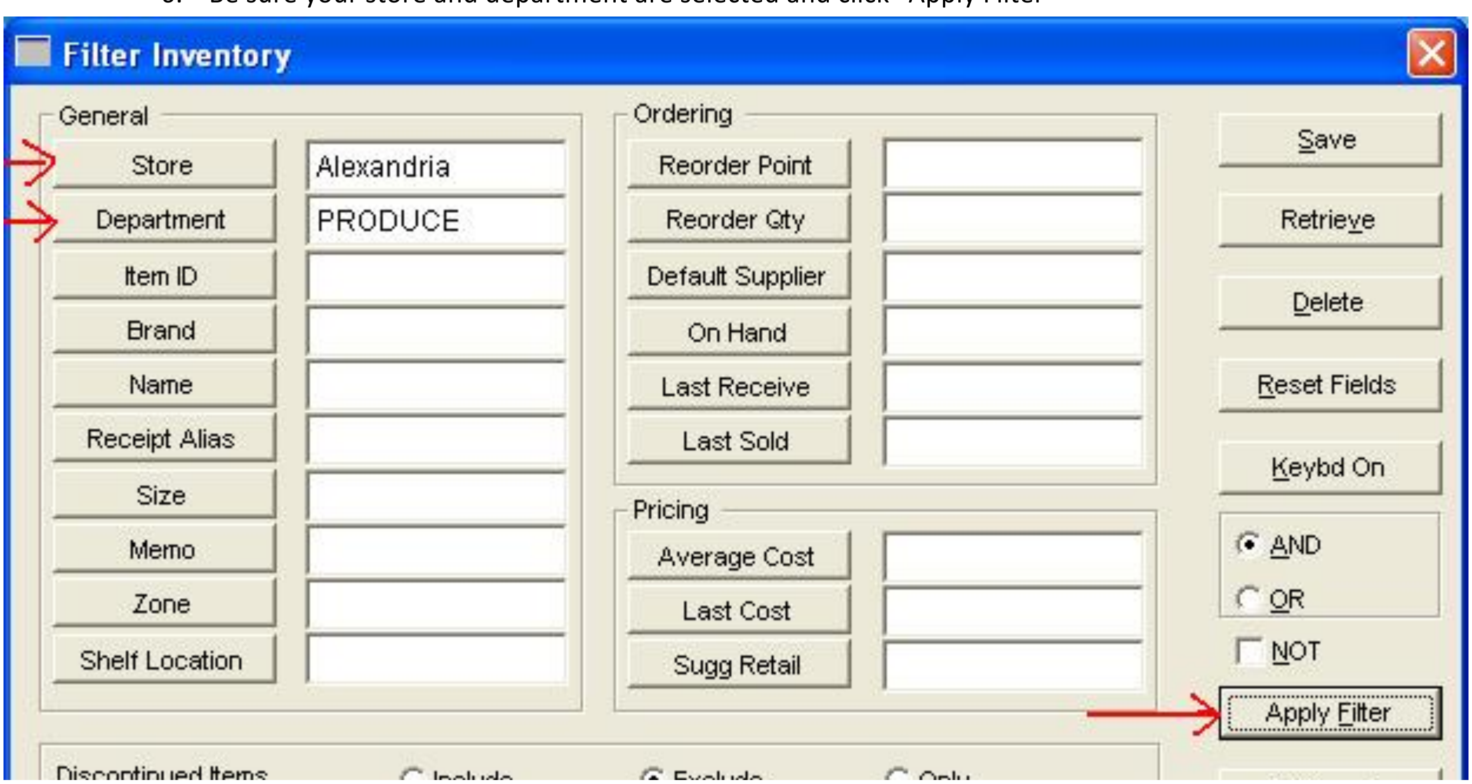
1. In Catapult, select "Reports"
2. Next, select "Maintenance" which is the last option.
3. Then, select "Inventory"



4. A new screen will open, allowing you to select which report you wish to run. Choose the second option – “Cost & Retail Value On Hand Summary”
5. Click “Display”



6. Be sure your store and department are selected and click “Apply Filter”



Cost & Retail Value On Hand Detail

Page 17 of 17
Print Date : 7/15/2012 10:23 PM
Note: Service Items not included on report
Reporting Range : Department: PRODUCE
Store: Rockville

Item ID	Receipt Alias	Store	Avg Cost	Base Price	On Hand	Ext Cost	Ext Retail
Grand Totals					2,792.800	$4,397.8665	$7,773.48

Executive Report Summary

Number of Departments :	1
Number of Unique Items Reported :	733
Average Number of Unique Items per Dept. :	733.00
Number of Items with Negative On Hand Count :	0

7. Use the total in the "Cost" column as your final Inventory Total.
8. Remember: this report must be run before the store opens on Monday following inventory.

Contact Alvin if you have any issues running this report.

Receiving Inventory into Catapult Checklist

Day Of Inventory (Sunday)

Before 5PM

- [ ] Entered all Invoices for the Period by 5 pm.
- [ ] Committed all outstanding Inventory Transfers by 5pm.

Before 8PM

- [ ] Called in to the Inventory Huddle at 7PM.

After 8PM

- [ ] Located Worksheet 2 in Catapult.
- [ ] Filled in inventory totals into Worksheet 2.
- [ ] Checked all items and count totals for accuracy.
- [ ] Saved Worksheet 2.

Before 11PM

- [ ] Emailed Evy, Alvin and Jon that inventory is complete.
- [ ] The computer remained running so that Alvin can review and commit your worksheets.

Before 12AM

- [ ] Inventory worksheets are checked and committed (Alvin does this)

After Inventory (anytime before 8am Monday)

- [ ] Run "Cost & Retail Value On Hand Summary" Report to find inventory dollar total.

Chapter 3 – Managing Sales

In this chapter, Produce Mangers will find information on pricing, and the Central Price Change file and AD items information, which includes information on what to do if poor quality AD items are sent to the stores.

There is also information on using the daily sales reports available in Catapult, updating the Produce Margin Tracking Sheets, Produce PLU information and details on how to process a special order.

Lastly, Produce Managers will find useful information on checking items for organic certification, merchandising and maintaining produce, and how to create and maintain signage.

Produce Pricing Information

Changing Produce Prices

While most items at MOMs are centrally priced, there are some items that are changed by the Produce manager, including lettuces, some mangoes, and other items. There are also rare occasions when Catapult does not update prices for certain stores, or price changes simply do not go through in time. In these situations, it is important that all MOMs Produce Managers know how to change prices in catapult.

1. Figure out if the price needs to be changed by calculating our cost of the item.
   a. To do this, divide the price we pay for the case by the weight or number of items in the case. For Example: If Lemons are $45 for a 38 pound case, divide $45 by 38. $45/38lbs=$1.18 per Pound. This is how much we pay for the item before our 1.6 mark up.

      Another example: If Collards are $45 for a case of 24 bunches, divide $45 by 24. $45/24 bunches=$1.87 per bunch. This is the cost of the item before our 1.6 mark up.

   b. If the cost of the item per pound or per bunch is **less** than the price that is listed in Catapult, you don't need to change the price right away. If the cost of the item is **more** than the price listed in Catapult, you need to change the price as soon as possible.

2. Use the following steps to Change the price of the item in Catapult:
   a. Click **"Worksheets"** on the bar at the top of the screen. Then Click **"Worksheet Editor"**
   b. When the Worksheet Editor screen comes up, click **"New"** at the bottom of the screen.
   c. You will have to enter a Name for the worksheet and a Worksheet Type.
      i. The Name of the worksheet will be "**HN-PRO-MMDDYY."** Enter todays date in the mm/dd/yyyy section. Example: if today is **July 15, 2012**, you would enter **071512** in that section.
      ii. The Worksheet type is **"Price Change"**
   d. The next screen is the **Price Change Worksheet** editor.
      i. You must enter the date by clicking the calendar box next to the date box. Make sure the day listed is todays date, and click **OK**.
      ii. Next, click the button for **"Permanent Price Change."**
      iii. Click **"Save"** at the bottom of the screen. The worksheet is now saved.
      iv. At the top of the screen, click the **"Items"** tab. Here you will begin entering PLU numbers to change their prices.
   e. In the Items Tab, you will enter the PLU number of the item you want to change the price for. Enter the PLU number in the **"ID Add"** Section near the center of the screen.
   f. The current price will come up in the column marked **"Adj Price."** Click in this area to change the price for that item. Remember that ALL PRICES MUST END WITH A 9 (.99, 1.29, 1.39, 1.49, etc).

Enter each PLU number and change the price for that item before moving on to the next PLU you need to change. Repeat steps a - f for each item that requires a price change in catapult.

g. When you are finished changing prices, click **"Save"** at the bottom of the screen.
h. When the worksheet is done saving, the **"Save"** button will disappear. Next, click the **"Commit"** button. This will make the price change final. A screen will come up asking "are you sure you want to commit this worksheet?" If you want to commit the worksheet, Click **"Yes."**
i. Catapult will ask if you want a report. Click **"No."**
j. You are finished changing prices. Click **"Close"** at the bottom of the screen.

Changing prices during store hours

The Central Price Change (CPC) sheets are sent out with enough time to be checked before the store opens, but occasionally it may be necessary to change produce prices during operating hours. When this is the case it is important to make sure that the price change is done as efficiently and in a customer service friendly manner. This means that the price change should be unnoticeable to customers that are shopping at the time of the price change. In order to do this, adhere to the following steps:

- Start a price change worksheet in catapult for the produce items that need adjusted,
- Save the price change worksheet,
- Remove signs from the produce department,
- Clean signs with fingernail polish remover or "Remarkable Ink Remover" (**Note:** Make sure that whenever fingernail polish remover is taken from the Wellness Department, that the wellness manager is aware of the item, and can shrink it out. Do not take products from Wellness without approval of the Wellness Department manager. Remarkable Ink Remover is available from Huberts),
- Write the new prices on the signs. Be sure your handwriting is clear and legible.
- Update the origin on the sign if necessary.
- Commit the price change worksheet
- Wait approximately 15 minutes before returning the signs to the department. (**Note:** Price changes sometimes take up to 20 minutes to reach the registers. It is important to check the price at the register to be sure it has changed before the sign is returned to the department).

Remember that the prices on the Central Price Change file have been changed by the produce buyer, unless otherwise noted. Produce Managers should not have to change the majority of these prices.

Shopping the competition

Produce Managers and Assistant Produce Managers are encouraged to shop their competition on a weekly basis. Competition is defined as any Whole Foods in your store's area, as well as, any independent grocery/natural food stores in the area (Roots, Common Market, TPSS, etc.). Competition may also include regular supermarkets with a somewhat of a natural food focus, for example Wegmans and Bloom.

When visiting a competitor, you should pay attention to the following:

- Sales Items
- Item prices that are significantly above or below what you are charging you department
- Merchandising strategies

Note 1: When visiting a competitor's retail location it is OK to memorize and/or write down prices, but it should be done in a way that you are not drawing attention to yourself. And when you are noticed it is important to stop at once.

In general, the way that we have always done price comparisons is to attempt to compare approximately 20 fruits and 20 vegetables. These items should be common, high-volume items that customers might purchase on a daily basis. For Example: Onions, Potatoes, Collard Greens, Kale, Broccoli, Cabbage, Navel and Valencia Oranges, Bananas, Lemons, etc.

As mentioned earlier in the document, it is not necessary to price check specialty items, like Bok Choy. These items are generally sell in too low a volume to make any significant impact on the Produce Departments margin, and are sometimes priced below full mark up so that they sell quickly.

Note 2. Cell phone is another way to quickly and efficiently report prices back to your store.

Remember the following when viewing produce in our competitor's stores:

- Pay attention to quality because price should definitely be a function of quality. So, if for example our quality far exceeds the quality of our competitor with an item like broccoli, then it is OK that our price is higher.
- Pay attention to brand name. Brand names can often tell you which vendor has sent a particular product. That information can prove very beneficial to MOM's in our attempt to consistently acquire the best product at the lowest price.

Central Price Change (CPC) file and AD Items

Most of the items in the Produce department at MOMs are centrally priced. Each week, the produce Buyer adjusts these prices based on current market cost (cost we pay the vendors for these items), which allows the Produce Manger to spend more time with customers and produce staff.

These adjustments are sent to each store via the Central Price Change file. The worksheet contains two tabs: a "Packaged" tab that lists all of the pricing and changes for packaged items, and a date tab (titled with the date the price changes take effect).

The tab titled with the date lists the following information:

a) **The date the price changes take effect.** It is important to make note of this date, and use the CPC file to walk your department for any discrepancies.
b) **"Buy From" columns.** The three primary produce vendors are listed, along with the items we have committed to purchasing from them during the upcoming week. While the majority of this list is updated on a weekly basis, some of these items will not change from week to week (Olivia's Salads from FS, BL Carrots from Alberts, and others possible).
c) **"Specials" and "Local" sections.** Any items that are priced outside of the normal pricing scheme, and should have special attention paid to them ("2 for $1" deals, deeply discounted prices, local specials, etc).
d) "**Notes/Reminders."** Special noteworthy changes in signage, deliveries, product quality, etc.

AD Items

Throughout the year, the Produce Buyer works on securing special prices on items from our primary vendors. These items are listed in the "Buy From" columns of the CPC file, and must be ordered from these vendors. It is important that all Produce Management (including Strong 3rds) order the AD items from the appropriate vendor – it is the Produce Managers responsibility to communicate this information to their Assistant and Strong 3rd to ensure that these items are ordered.

In the event that there are quality issues on an item, please use the "AD Item Quality Issues" Form. This will supply the Regional Produce Support Team with the information necessary to discuss the issue with the vendor. Poor quality AD items that arrive are often the result of old lots, and can be switch out or substituted in later deliveries.

If the issue persists, the Produce Buyer will decide when to cancel the AD on that item. The decision to cancel an AD should not be made by individual Produce Managers.

The Date Tab of the CPC file

July 27, 2012 Central Price Changes

Buy from FS	Buy from Alb	Buy from Class
Olivia's Baby Salads!!!	Ad Items:	Items
$38.50 36 ct. grapefruit	$32.50 pint blueberries	$26.50 salsa (made w/local tomatoes)
$28.50 56 ct. valencias	$17.50 cantaloupe (for low volume stores)	$20.00 8 ct pineapple
$21.50 Driscoll strawberries	$15.50 honeydew	$36.00 kiwi
$29.50 red plums	$49.00 avocado	$54.00 95 ct Lemons
$42.50 yukon gold potatoes	$26.00 cauliflower	$46.50 "Sweet 2 Eat" Peaches
$56.50 russets	$30.50 celery	$46.50 "Sweet 2 Eat" Nectarines
$23.00 grape tomatoes		$38.00 Anthony Vineyard Red Grapes
		$38.00 Anthony Vineyard Green Grapes
		$38.00 Anthony Vineyard Black Grapes
		$27.00 Bonipak Broccoli
	Non-Ad Items:	
	$40.70 5# BL carrots	JS, RV, AX & CP are getting dropped
	$40.70 2# BL carrots	cantaloupe bins on FRIDAY!
	$40.70 1# BL carrots	Pls. let me know how long it takes to
	$12.00 crimini mushrooms	run out, thanks.
	$15.75 portabella mushrooms	
	$19.00 shiitake mushrooms	
	$21.00 broccoli sprouts	
	$15.20 crunchy sprouts	
	$12.65 mung/"bean" sprouts	
	$25.20 sunflower sprouts	
	$9.20 sweet pea shoots	

	Specials	Local
2 for $1 kiwi or $0.69	$3.99 pint blueberries	Try to get local watermelon bins
$3.99 Strawberries	$3.99 local heirloom tomatoes	from Lancaster Farm Fresh
$0.69 cantaloupe	$2.99 grape & rainbow cherry tomatoes	

Notes/Reminders:

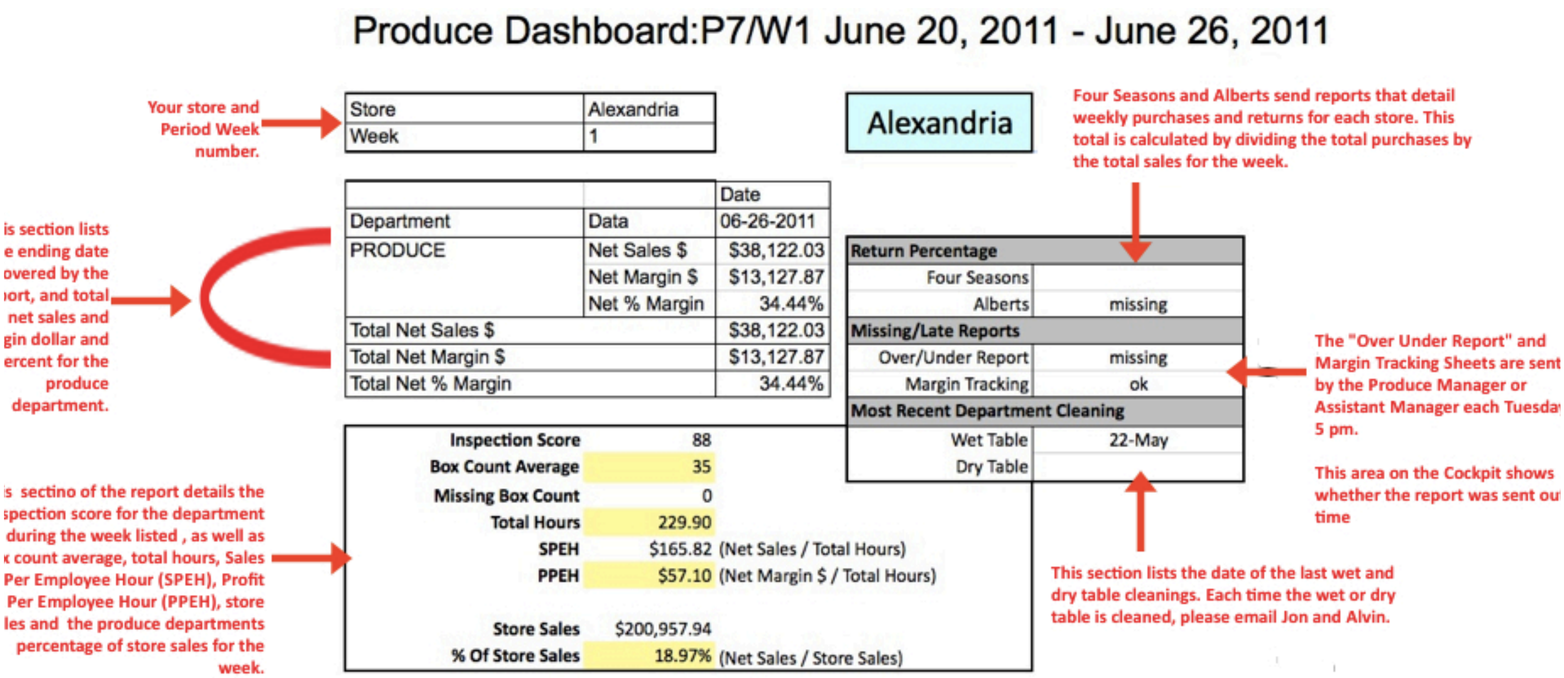
Feel Free to Remove sale sign for Kiwi and use "Moms has Lowest Price" sign

MOMs Local Truck This FRIDAY

Try to avoid bringing in Galas if possible. They are margin killers right now. -->Shoot for alternative apples

*Cantaloupe: So, high volume stores are each getting a bin from Class on Friday. Low volume stores, please order the ad carton cantaloupe from ALBERT'S. Super sale at $0.69 while supply lasts. Thanks

How to read the Produce Cockpit and Box Count report



Produce Dashboard:P7/W1 June 20, 2011 - June 26, 2011

Your store and Period Week number.

Store	Alexandria
Week	1

Alexandria

Four Seasons and Alberts send reports that detail weekly purchases and returns for each store. This total is calculated by dividing the total purchases by the total sales for the week.

is section lists e ending date overed by the ort, and total net sales and gin dollar and ercent for the produce department.

		Date
Department	Data	06-26-2011
PRODUCE	Net Sales $	$38,122.03
	Net Margin $	$13,127.87
	Net % Margin	34.44%
Total Net Sales $		$38,122.03
Total Net Margin $		$13,127.87
Total Net % Margin		34.44%

Return Percentage	
Four Seasons	
Alberts	missing
Missing/Late Reports	
Over/Under Report	missing
Margin Tracking	ok
Most Recent Department Cleaning	
Wet Table	22-May
Dry Table	

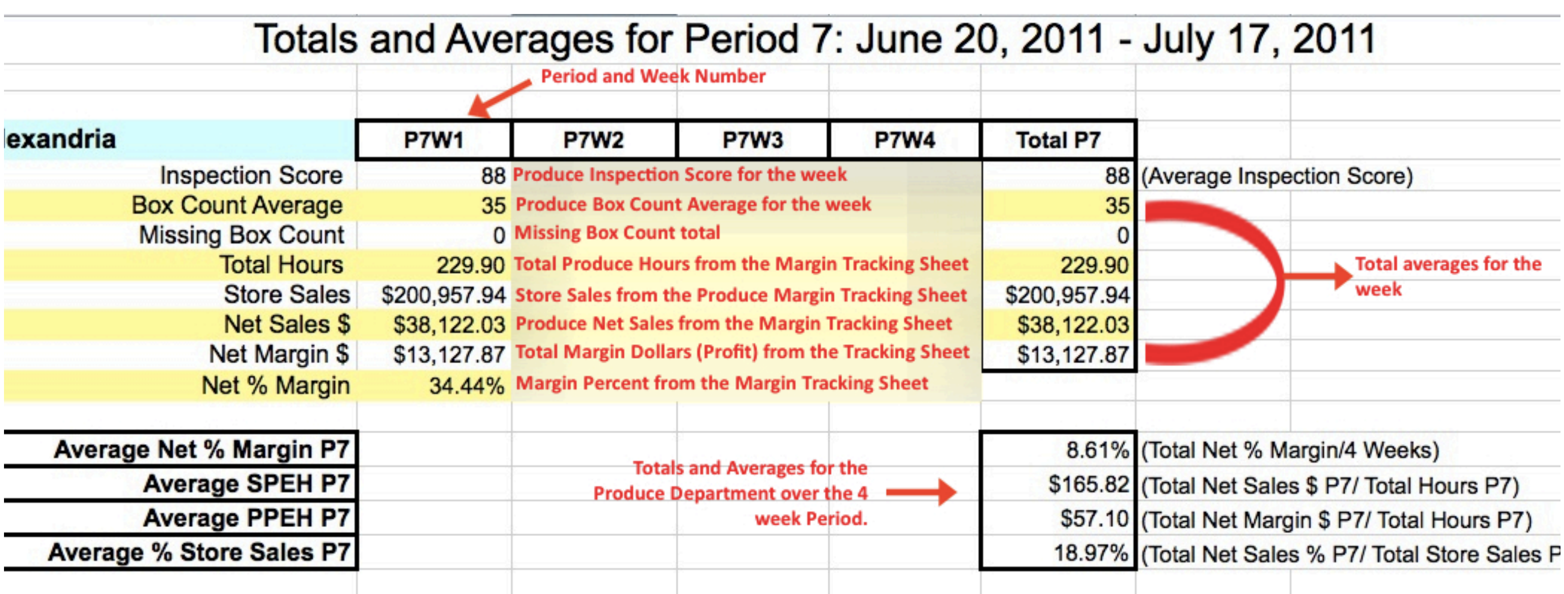
The "Over Under Report" and Margin Tracking Sheets are sent by the Produce Manager or Assistant Manager each Tuesda 5 pm.

This area on the Cockpit shows whether the report was sent ou time

s sectino of the report details the spection score for the department during the week listed , as well as count average, total hours, Sales Per Employee Hour (SPEH), Profit Per Employee Hour (PPEH), store les and the produce departments percentage of store sales for the week.

Inspection Score	88	
Box Count Average	35	
Missing Box Count	0	
Total Hours	229.90	
SPEH	$165.82	(Net Sales / Total Hours)
PPEH	$57.10	(Net Margin $ / Total Hours)
Store Sales	$200,957.94	
% Of Store Sales	18.97%	(Net Sales / Store Sales)

This section lists the date of the last wet and dry table cleanings. Each time the wet or dry table is cleaned, please email Jon and Alvin.



Totals and Averages for Period 7: June 20, 2011 - July 17, 2011

Period and Week Number

exandria	P7W1		Total P7	
Inspection Score	88	Produce Inspection Score for the week	88	(Average Inspection Score)
Box Count Average	35	Produce Box Count Average for the week	35	
Missing Box Count	0	Missing Box Count total	0	
Total Hours	229.90	Total Produce Hours from the Margin Tracking Sheet	229.90	
Store Sales	$200,957.94	Store Sales from the Produce Margin Tracking Sheet	$200,957.94	
Net Sales $	$38,122.03	Produce Net Sales from the Margin Tracking Sheet	$38,122.03	
Net Margin $	$13,127.87	Total Margin Dollars (Profit) from the Tracking Sheet	$13,127.87	
Net % Margin	34.44%	Margin Percent from the Margin Tracking Sheet		

Column headings P7W2, P7W3 and P7W4 appear between P7W1 and Total P7.

Total averages for the week

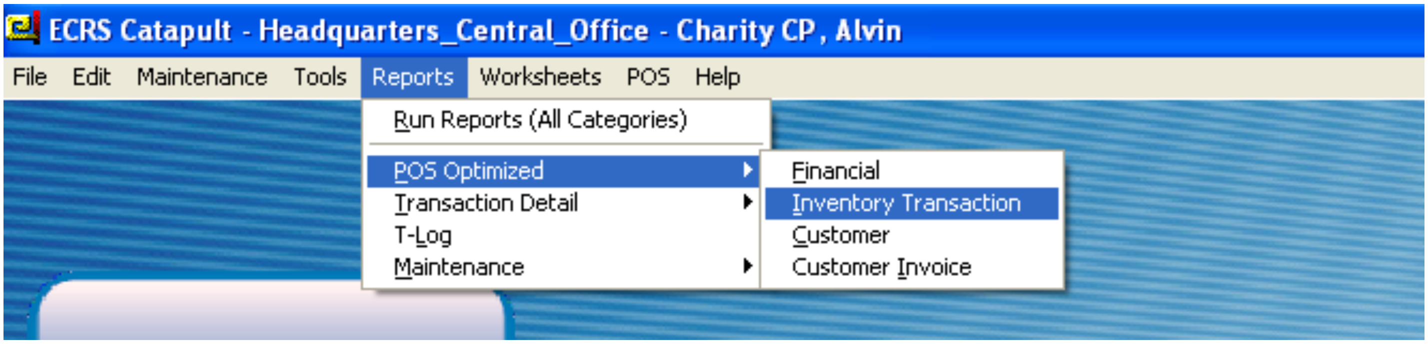
Average Net % Margin P7	8.61%	(Total Net % Margin/4 Weeks)
Average SPEH P7	$165.82	(Total Net Sales $ P7/ Total Hours P7)
Average PPEH P7	$57.10	(Total Net Margin $ P7/ Total Hours P7)
Average % Store Sales P7	18.97%	(Total Net Sales % P7/ Total Store Sales P

Totals and Averages for the Produce Department over the 4 week Period.

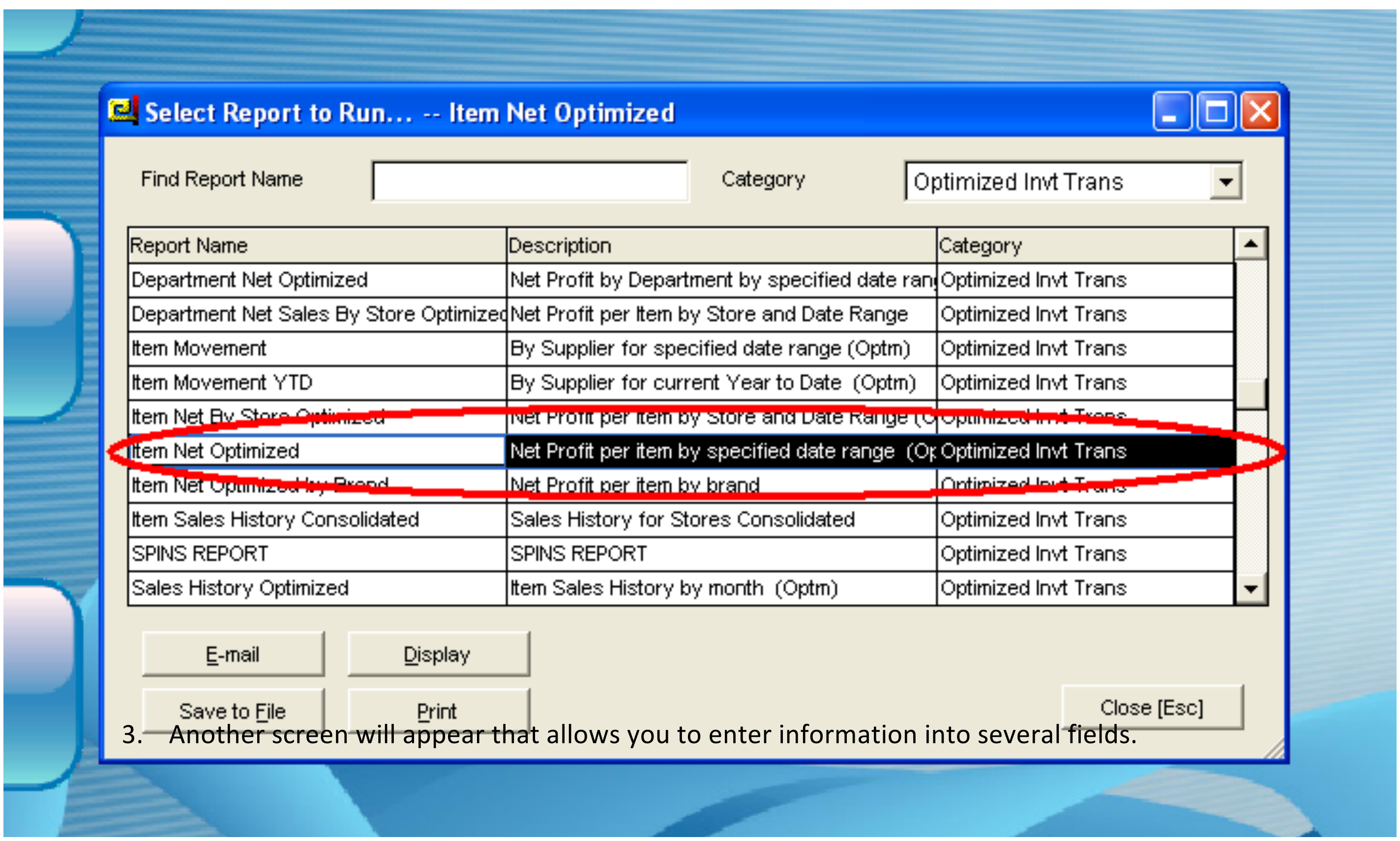
Running Sales History Reports for the Produce Department

In order to determine the movement (sales) on an item or group of items from dates prior to the current date, a report must be run. This report will allow you to enter a specific date range for the item you would like to research and provide you with movement details and total sales on that item.

1. Under the “Reports” tab in Catapult, choose POS Optimized and then choose Inventory Transaction.

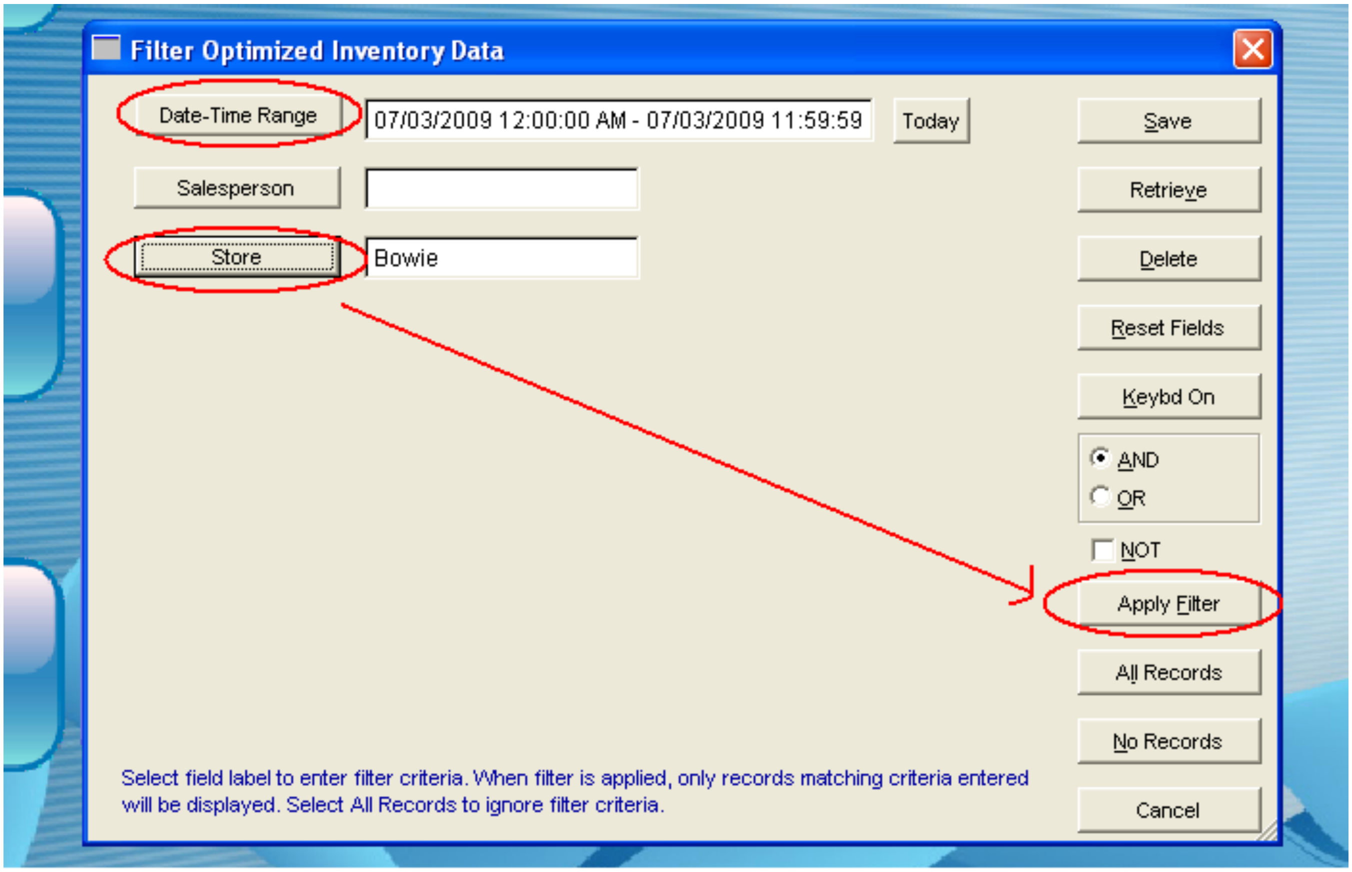


2. A screen will open in the center of the screen that will show a number of report options. The report you need to find the sales history of an item(s) is the “Item Net Optimized” report. Click this line so that the report name is highlighted, and click the “Display” button on the bottom left-hand corner of the box.

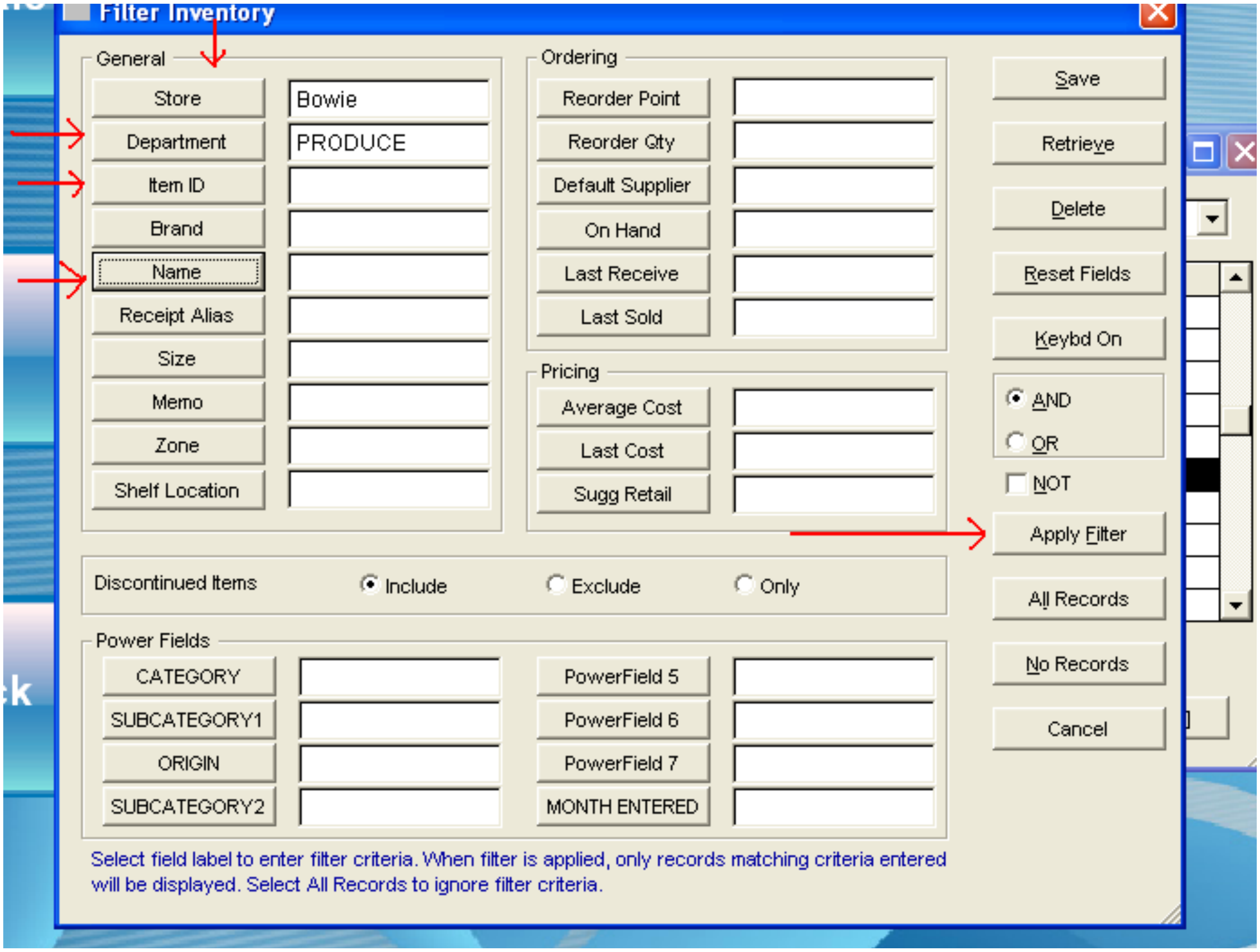


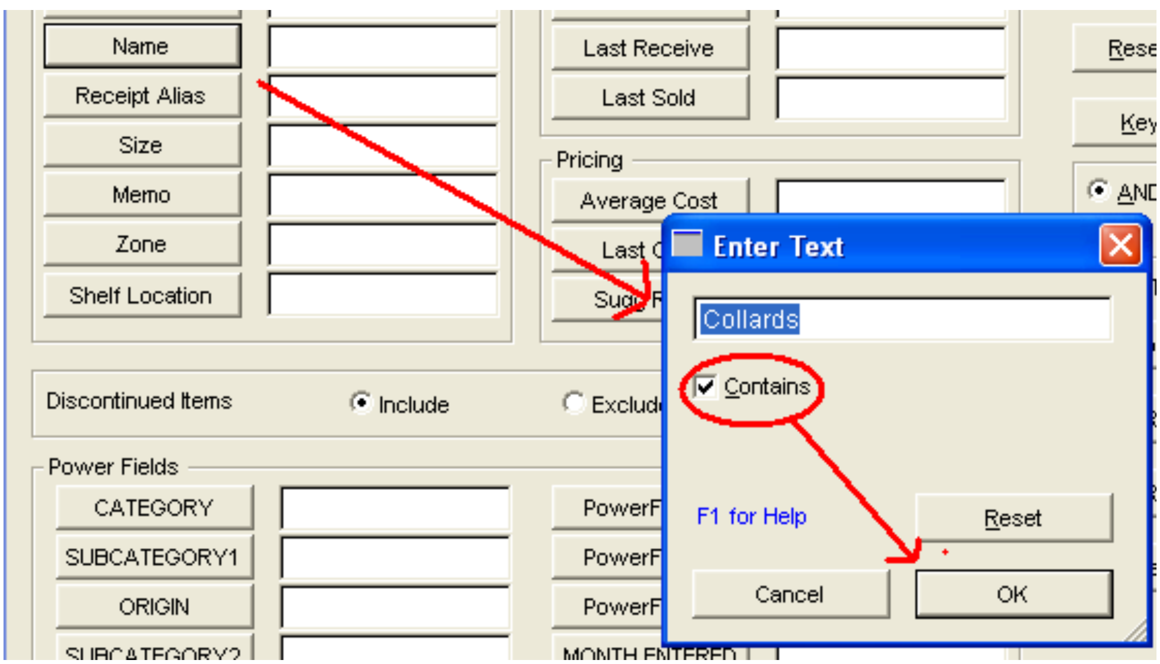
3. Another screen will appear that allows you to enter information into several fields.

a. Under “Date-Time Range” enter the dates you wish to search. All dates must be entered in MMDDYY format, and also must include the time of the transaction (to search for entire days, be sure the time reads “!2:00:00 AM” after the first date entered and “11:59:59 PM” after the second date entered. If you want to search for a specific time of day, simply adjust these two numbers to suit your needs).
b. You will not need to enter any Salesperson data, so you may skip this section.
c. In the “Store” line, choose your location.

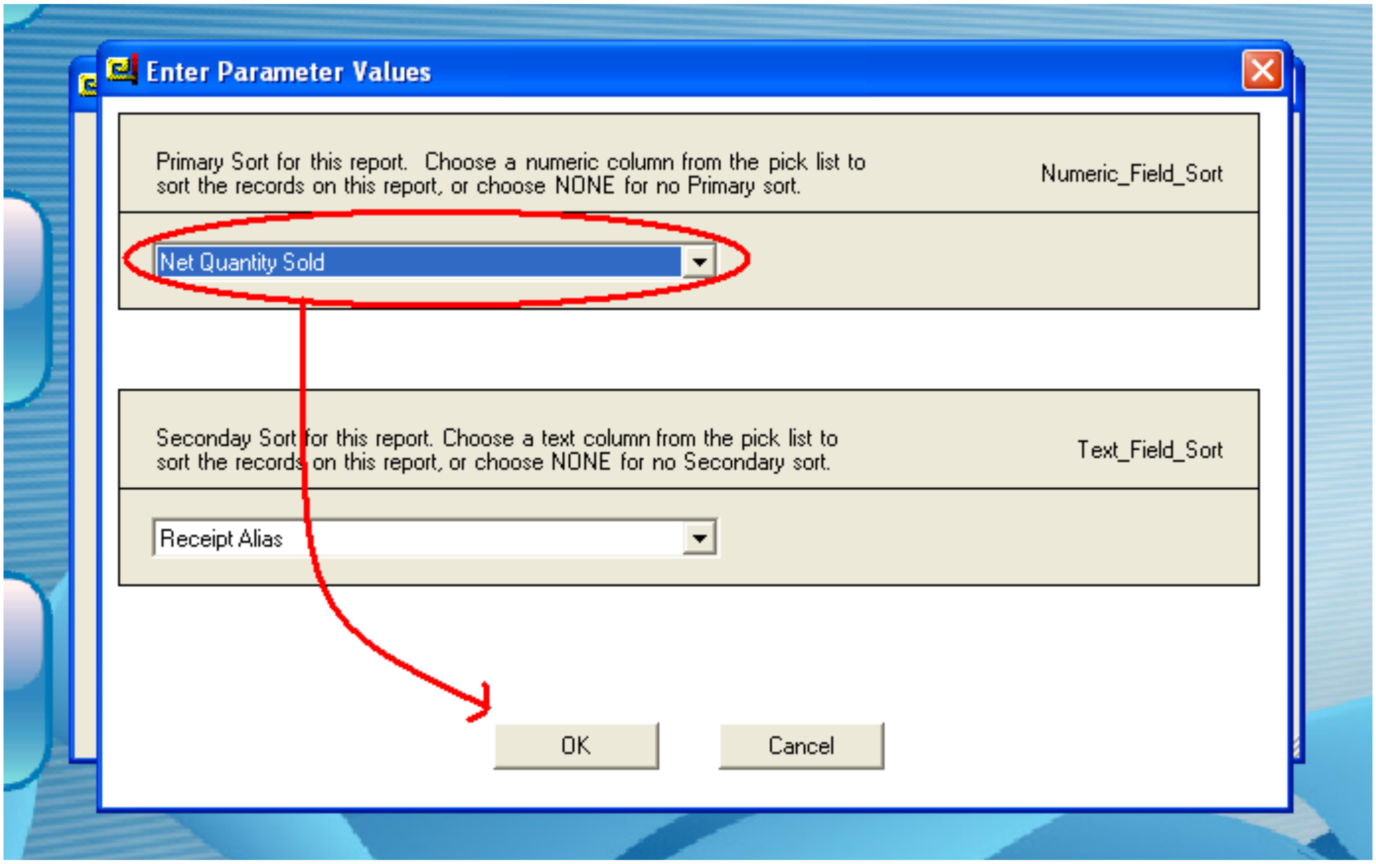


4. AAfter all information is entered, click “Apply Filter” and wait.
5. In a few moments, a screen will appear that will now allow you to enter additional information pertaining to your search.
   a. Under the “Store” line, enter your location. This must match the location you entered on the previous screen or the report will not contain any relevant results.
   b. On the “Department” line, enter Produce. If produce is not entered, results from the entire store will appear on the report.
   c. If you know the item id (PLU or UPC code) of the item you wish to search for, enter it on the “Item ID” line. If you would like to search for the item by name, leave this line blank.
   d. Click the “Name” button to enter the name of the product you want to search for. Selecting “contains” will allow more results to show up on the report.
   e. When you are finished, click the “Apply Filter” button on the right side of the screen and wait.


Filter Inventory
General
Store
Bowie
Department
PRODUCE
Item ID
Brand
Name
Receipt Alias
Size
Memo
Zone
Shelf Location
Ordering
Reorder Point
Reorder Qty
Default Supplier
On Hand
Last Receive
Last Sold
Pricing
Average Cost
Last Cost
Sugg Retail
Save
Retrieve
Delete
Reset Fields
Keybd On
AND
OR
NOT
Apply Filter
All Records
No Records
Cancel
Discontinued Items
Include
Exclude
Only
Power Fields
CATEGORY
SUBCATEGORY1
ORIGIN
SUBCATEGORY2
PowerField 5
PowerField 6
PowerField 7
MONTH ENTERED
Select field label to enter filter criteria. When filter is applied, only records matching criteria entered will be displayed. Select All Records to ignore filter criteria.


Name
Receipt Alias
Size
Memo
Zone
Shelf Location
Last Receive
Last Sold
Pricing
Average Cost
Discontinued Items
Include
Power Fields
CATEGORY
SUBCATEGORY1
ORIGIN
Enter Text
Collards
Contains
F1 for Help
Reset
Cancel
OK

6. A screen labeled “Enter Parameter Values” will appear. Be sure to choose “Net Quantity Sold” on the first line (this option should automatically select when the screen appears).



7. Click “OK” and wait.

This report is useful for finding the item movement on certain holidays, or during a time of year when the movement is highest. Using this information can help predict future sales on this item on upcoming holidays, etc, and prevent any over or under ordering in the produce department.

Entering Invoice Totals into the Margin Tracking Sheet

Margin Tracking Sheet Information

1. The margin tracking sheet name should always begin with your stores abbreviated name (AX, BW, CP, FR, HN, JS, RV, TM) and end with the year. Example: **CP Produce Margin Tracking 2012**. The Margin Tracking sheet should also be set up so that the entire year is visible, meaning the margin tracking sheet has "tabs" at the bottom that show each individual month of the year and that months corresponding credit log.

2. The margin tracking sheet should have a "Monthly Totals" section at the bottom of the sheet for each month that give an accurate total for all of the weekly information. The weekly and monthly totals should always match weekly and monthly totals in catapult, and it is the responsibility of the produce manager to check purchase/sales/credit totals, and maintain an organized and accurate margin sheet.

3. Before sending the Margin Tracking Sheet out every week, be sure to save the file with the current week and period showing. For Example: If you are sending a Margin Tracking Sheet for Period 7 Week 2, be sure to save the file with the Period 7 tab open. If you have any questions about this process, please contact Alvin.

NOTE: Produce managers must check all information for accuracy BEFORE sending any weekly margin sheets to the central office on Tuesday.

Entering Invoice Totals

To avoid inaccuracies, invoice totals should be entered into the margin tracking sheet on a daily basis. To do this, simply enter the invoice total on the day you receive the delivery (and the invoice that corresponds to that delivery). If you are entering an invoice for a day other than the present day (today), then you must find the date on the invoice.

Steps for entering invoices in either case are as follows:

Four Seasons Invoices:

ii. The Invoice Total on Four Seasons Invoices is in the bottom right hand corner of the sheet between the word **"Total"** and a percentage (the percentage is not important for the Margin Tracking sheet).

iii. Enter the Invoice Total in the row marked **"Four Seasons"** under the applicable date.

iv. Make sure the date on the actual Four Seasons Invoice matches the date you're using on the Margin Tracking sheet.

v. Check the Margin Tracking sheet on a weekly basis to be sure that the invoice totals match the dates for which you are entering them. Four Seasons invoice dates always correspond

Produce Special Order Procedures

Any MOM's Customer is entitled to a 10% discount off of the retail price of any produce item in our stores.

Taking Special Orders

- Special orders can be taken over the phone, or when the customer is in the store. However, it is sometimes unlikely that there is a case of the product available in back stock at the time the order is placed.
- If the case is not available in back stock, it is important for a produce staff person to write down the customers contact information including: 1) full name and 2) phone number. When the case arrives in the store, the customer should be contacted immediately after the store opens to let them know their order is available for pick-up.
- Only special orders for organic produce items should be taken. The only exception to this rule is if a customer request Thai Coconuts. When you receive this product in your back stock, it should be kept as far away from your organic back stock as possible to prevent contamination.
- When the customer requests a case they should be told immediately what the cost will be (Note: you should not tell them how you arrived at the cost). It is important that the produce manager on duty takes the time to examine our current pricing and margin in catapult to determine the cost of the case.

Determining the price of the case

- There are a few important factors to consider when determining the price of a case for a customer:
    - It is important to pay attention to items we are selling at a discount, or at a loss/low margin. **We do not give 10% case discounts on these items.**
    - An easy way to determine whether a discount should be applied to an item is to run an Item Net Optimized report for that item. If the margin in catapult is lower than 30%, this item is not eligible for a discount.
    - Be sure to let the customer know that the item is already being sold at our regularly discounted price, so the price cannot be reduced any further. If the item has multiple varieties, it may be helpful to offer suggestions of similar products. For example, if a customer wants a case of Galas that cannot be discounted, suggest a similar-tasting apple for them. Make sure the cost of the suggested item with the discount would be lower than the price of a case of the original item.

Calculating the price

- The easiest way to determine the cost of the case is to subtract 10% off of our retail price.
    - Example: if an item is $2.49 each, multiply .10 by 2.49
        - 2.49 x .10 = .249 -- .249 is the dollar amount of the discount per unit.
- Next, subtract the dollar amount of the discount from the retail price.

    - Example: 2.49 - .249 = 2.24 -- $2.24 is the discounted price per unit
    - **NOTE: if the discounted price per unit is equal to or lower than the cost of the item in catapult, this item is not eligible for a discount.** To find the cost of an item in Catapult:
        - Click “Maintenance” at the top of the Catapult window
        - Next, enter an item name in the “Name” field, and click “Contains”
        - Then, click “Apply Filter”
        - When the item appears, find the buttons on the right side of the screen.
        - Select the “Pricing (3)” button.
        - Finally, look for the “Last Cost” and “Average Cost” lines on the left side of the screen.
        - To determine whether the price per unit of the item is lower than the cost in catapult, use the total in the “Last Cost” box.
    - Also keep in mind that if the price per unit is very low (but not equal or lower than the cost) it might be an item that we should not sell at a discount.
- To find out the cost of the case, multiply the discounted price per unit by the number of items in the case.
    - Example: $2.24 x 24 = $53.76 -- $53.76 is the price of the case for the customer.

Finishing the special order process

- Once the price is agreed upon you can either get them the case (if it is available) or let them know when the case will arrive.
- Be sure a customer is aware of when their order will tentatively arrive. Remember that special orders placed after our vendor cut off times will be delayed by one day. For example: if a customer requests a case of Navel Oranges after 4 pm during the week (or 11 am on weekends), the order cannot be placed until the following day. This means the customer will not receive their case until 2 days after they placed the order.
- When the customer arrives at the store to pick up their order, a member of the produce staff should take it to the register for the customer. The case should have the price written on it for the cashier to consult at the time the customer is being checked out.
- All Special Orders should be rung up by using the PLU or UPC associated with this item. Special orders are never to be sold using the “open price” codes.

Setting Up Produce Displays

In order to assure that merchandising is consistent at all MOM’s locations the following core principles and procedures have been developed.

How to set up produce diplays, and maintain them during the day

The set up of the produce department begins each day with the arrival of the produce staff at 6 am. Throughout the morning additional members of the produce team arrive and fulfill different function depending upon the store and the needs of the produce manager on any given day. The goal of this process can be divided into 4 principal areas:

1. Setting up the produce displays. When setting the displays at MOM's, it is important to remember MOM's promise to our customers: We only sell the Highest Quality, 100% Organic Produce. As a result of MOM's Promise the department has developed a classification procedure that evaluates all produce items as being either 1) salable, 2) marginal, or 3) compost material. Defining to which of the above mentioned categories a piece of fruit or vegetable pertains is paramount to the department's ability to fulfill its' promise to the customers:

1. **Salable:** Items identified as salable (able to be sold, no signs of quality defects or age) must be of the highest quality and should always be placed on the display tables
2. **Marginal:** Items defined as marginal are still edible items, but they are not salable because of issues such as blemishes, discoloration, oddly shaped, marginal wilting, over ripened, etc. These items should not be displayed in any produce department.
3. **Compost Material:** Items defined as compost material are those that are in a state of severe decay, i.e. rotting and are thus unusable for human consumption. Some common compost materials include: bagged salads, sprouts, berries, and fruits with a lot of rot in certain areas. Half eaten fruits are also to be composted.

MOM's Produce Standards - At MOM's it is always better to take marginal items of the table and compost them. From a marketing standpoint it is important to realize that marginal items almost never sell and if they do, they sell at a very slow rate. It is especially important to remove marginal produce from the tables when we have the same product but fresher in the "walk in cooler" or another back stock location.

It is important to separate marginal and compost materials. MOM's donates a great deal our marginal and compost materials to local philanthropies and/or farms. As a result, it is important to keep the two categories of product separate from one another.

Some tips for doing this include:

- Keep the compost materials out of the marginal boxes
- Save and use boxes for compost and marginal items
- Keep marginal and compost boxes only in designated locations. They should always be kept away from salable items (cases). The presence of these items around salable cases of fruits and vegetables can actually speed up the ripening process of salable items and this increase your shrinkage rates.
- Any items put in a compost box must be free of all plastic, including but not limited to plastic bags, rubber bands, plastic containers.

2. Setting up the bottom rack of the wet table. On a daily basis the setting up of the bottom rack of the wet table is generally the responsibility of the produce manager or her/his assistant or strong third.

While execution of this task varies depending on the produce department schedule, the minimum goal is to stock all of the high quality product from the day before and fill in any new product that may have arrived with the new deliveries.

Early arrivers are able to not only put up new products from that days' deliveries but she/he is also able to cull through and re-prep all (or at least a large portion) the "day old" product before opening.

ALL PRODUCE (whether left over from the previous day, or from the delivery that day) must be prepped before it is placed on the bottom rack of the wet table.

3. Setting up the dry table

- **All items on the dry table must be rotated daily.** To properly rotate the following steps should be followed for any single product:

    - ***Step 1. Remove old items from the table.***
    - ***Step 2. Clean the empty spot of leftover debris.*** The dry table must be swept free of any debris anytime product is removed from a location on the dry table. Items such as onion skins, garlic skins, and shallot skins are particular problem areas on the dry table.
    - ***Step 3. Place new items on the table.*** New items should be placed on the table. When putting up a new case you should never dump the case into the display rack. "Dumping" causes bruising of the fruit or vegetable. All new items must be inspected for quality and organic certification before being placed on the table.

    - ***Step 4. Inspect items removed from the table.*** Inspect all the leftover items one-by-one that were removed from the table in ***Step 1***. All marginal items should be removed and only high-quality items should be placed back on top of the newer items. When inspecting older products on the dry table it is necessary to consider the following: a) If the item removed from the table is visibly lower in quality than the new item, you must compost the older item. b) Never mix varying sizes of the same produce item; especially products sold as individual units/by the each. In this case it is important to let the older product run out or get very low before new (different sized) product is put up on the table; and c) When a display for a product becomes low, any remaining items must be removed, and new product stocked in its place.

- **Create an appearance of abundance and diversity of products on the table(s).** The creation of a produce display is almost as important as the condition of the produce itself. When creating a display it is helpful to consider the following:
    - Items should be stacked as high as possible, but not to the extent that items can roll off of the table and onto the floor.

    - There are certain items that should never be stacked more than two rows high. These items include stone fruit, avocados, tomatoes, etc. With these items, it is important to "dummy up" the displays by placing a black basket underneath the matting in the basket to give the appearance of abundance. This allows the display to look full while avoiding damage.

    - Categories of produce should be kept together. For example, all varieties of potatoes should be displayed in the same area of the dry table.

- Within each product category, it is important to try to vary color, shape, and size. For example: red potatoes should be placed between russets and yellow potatoes, or Large Navel oranges should be placed between smaller Valencia oranges and Tangelos, etc.

4. Setting up the top rack of the wet (refrigerated) table and other "pre-pack" areas and or fruit areas of the wet tables.

When stocking the wet (refrigerated) table it is important to note that every item must be inspected to assure MOM's high quality standards.

- **All new prepackaged items must be inspected for their "sell by dates".** To ensure optimal freshness of the prepackaged items in the produce department it is important to assure that all newly arrived items should have at least a 7-day shelf life from the day that we receive them. For example, if today's date is June 10th all bagged salads that are received today should have a sell by date at least June 17th. When short-dated packaged items arrive to a store it is important to bring this to the attention of the produce manager and/or his/her assistant so that a credit can be obtained from the distributor.

- **When filling in new packaged items behind older packaged items it is important to inspect quality of the older products.** If there is a large discrepancy between the quality of the new items compared with the older/leftover items, then the older items should be either placed in a compost box.

- **Always inspect the sell by date on packaged items.** MOM's policy is that all packaged items should be pulled off the produce department tables when they are within three days of the sell by date. For example, if today is June 7th and the sell by date on the package says June 10th then it should be pulled from the department.

- **Always inspect prepackaged items for decay and blemishes.** Prepackaged items must be examined with the same care as any other items in the produce department. This means that bags and containers must be looked into and opened to assure the highest degree of freshness. Some items that require a high degree of attention are berries (strawberries, raspberries, blueberries, blackberries), packaged herbs, grapes, tomatoes (grape and cherry), and sprouts.

Chapter 4 – Department Maintenance

In this final chapter, Produce Managers will find information pertaining to the regular upkeep of their departments and display areas, including checklists for Managers and staff, Produce inspection information, cleaning the Wet and Dry tables, and maintaining outside displays.

Produce Managers Daily Checklist

Daily Task List for Produce Managers

This is a sample Daily Task List for Produce Managers. This list is particularly useful for individuals who are new to Produce Management, and need guidance with establishing a routine. This list can and should be adjusted to suit the needs of the store.

5:00 am	Walk Department and check dry table for low product as well as above wet table product.
5:05 am	Start computer and fill sinks.
	Check any deliveries and break down product that arrived before you.
	Make note of returns.
	Rotate Stock (FIFO)
	Make note of new items.* (*Update PLU sheets for cashiers.)
5:30 am	Pull sales numbers, enter sales totals into margin tracking sheet.
	Enter invoices (if time allows).
	Check and respond to any time-sensitive email.
6 am (or earlier)	Start to trim and Set wet table as applicable to store.
6 am (or earlier)	Instruct assistants on necessary items to be stocked and rotated.
7:30 am	Start to set wet table
8:25 am	Begin Cleaning Floors, wipe down tables, make signs, set signs (origin if possible as well).*
8:45 am	Store Huddle
9:00 am	Walk department to check quality, signs, and pricing.
9:15 am	Make note of necessary trim and prep for the day.
11:00 am	Work on orders (some local orders will need to be placed earlier than this).
	Sign Walk
12:10 am	Enter any outstanding invoices.
1:00 pm	Prepare for the Produce Huddle (Huddle is at 1:03 pm)
1:15 pm	Finalize any merchandising.
	Manager walk and Reset.
2:00 pm	Manager out

Produce Department Cleaning

Dry Table

Date of last Cleaning	Parts of table cleaned (baskets, euro tables, grates, etc)	GM Signature

Wet Table

Date of last Cleaning	Parts of table cleaned (top rack, grates, interior, etc)	GM Signature

Cooler

Date of last Cleaning	Areas of Cooler cleaned (beneath racks, walls, etc)	GM Signature

Produce Wet Table Cleaning Checklist

This checklist covers the basic details of cleaning the produce wet table.
The process varies from store to store, but feel free to use the checklist below to guide you through the process.

Prior to the Produce Wet table cleaning

- [ ] Made sure all supplies were available, or will be available before cleaning day
- [ ] Scheduled adequate staff

Day of cleaning

- [ ] Gathered Supplies
- [ ] Created space in the cooler for "top rack" product
- [ ] Talked to closing store manager about the cleaning

Cleaning

- [ ] Removed all product from the table and place in cooler
- [ ] Removed all signs from the table
- [ ] Turned wet table off
- [ ] Removed black matting for cleaning or disposal
- [ ] Removed metal grates and plastic/metal covers for cleaning
- [ ] Unplugged all fans
- [ ] Removed all rotten produce "sludge" from the inside of the table, cleaned walls and shelves, wiped down mirrors
- [ ] Used bleach to clean drains (if needed)

After Cleaning

- [ ] Turned table back on and plugged fans in
- [ ] Returned the metal grates and plastic or metal covers back to bottom portion of the table
- [ ] Placed washed or new black matting on the shelves and bottom of the table.
  Replaced velcro, if needed.
- [ ] Returned all "top rack" product and signs
- [ ] Returned all supplies to their designated areas
- [ ] Disposed of any trash or waste water, swept and mopped department floor as needed

Produce Dry Table Cleaning Checklist

This checklist covers the basic details of cleaning the produce dry table.
The process varies from store to store, but feel free to use the checklist below to guide you through the process.

Prior to the Produce Dry table cleaning

- [ ] Made sure all supplies were available, or will be available before cleaning day
- [ ] Scheduled adequate staff

Day of cleaning

- [ ] Gathered Supplies
- [ ] Set aside storage area for product while table is being cleaned
- [ ] Talked to closing store manager about the cleaning

Cleaning

- [ ] Removed all product from the table and taken to storage area
- [ ] Removed all signs from the table
- [ ] Removed any baskets or additional matting/supplies from table for cleaning or disposal
- [ ] On newer tables, removed metal grates and plastic/metal covers for cleaning
- [ ] Removed all rotten produce from the inside of the table/off of the table frame (eurotables), cleaned walls and/or table frame, vacuumed dust and dirt, wiped down all parts of the table

After Cleaning

- [ ] Returned the metal grates and plastic or metal covers back to bottom portion of the table
- [ ] Placed washed or new black matting, baskets, other supplies on the shelves and bottom of the table.
- [ ] Returned all product and signs
- [ ] Returned all supplies to their designated areas
- [ ] Disposed of any trash, swept and mopped department floor as needed

Produce Inspection Training Guide

Why we do inspections?

- Produce inspection are meant to be a learning tool for produce managers and their staff. As a learning tool, the inspection identifies areas were the department is performing well, as well as, areas where the department can improve;
- The inspection form is a type of “checklist” that affords store managers and regional produce staff with a consistent instrument to evaluate a produce department;
- The inspection ensures that we are all generally looking at the same things in the department;
- Inspections will identify issues quickly, allowing produce department managers to correct quickly as well. The key to this happening is consistent, thorough inspections;
- In general it is hoped that inspection will not need to be used as a punitive tool. Nonetheless it is worth noting that a pattern of poor inspections is an indicator of a department not measuring up to expectations.

How often should inspections take place?

Store managers are asked to complete at least one produce inspection per week.

- It is best if the inspection occur on different days every week and at different times. This will give a well-rounded assessment of the department over time.
- Regional produce staff will complete produce inspections at all stores as well.

How long does it take to do an inspection?

An average inspection takes about 90 minutes to complete, with an additional 20 minutes to type up the inspection results.

What should you do with an inspection after it is completed?

Review with produce manager and/or assistant produce manager. Deductions should be discussed with a plan of action outlined.

Send inspections to:

- "Alvin Charity" - alvinc@momsorganicmarket.com
- “Chris Miller” chris.miller@momsorganicmarket.com
- “Jason Caston” jason.caston@momsorganicmarket.com
- “Jon Croft” - jon@momsorganicmarket.com
- "Soren Huber" - sorenh@momsorganicmarket.com
- "William Deal" - williamd@momsorganicmarket.com
- Store managers in store where the inspection took place
- Produce Manager and Assistant

Scoring

The score on produce inspection does not represent a letter grade.

Over longer periods of time (several months), scores can be used a quantitative indicator. For example: an analysis of scores spanning several months can tell: a) if one store is lagging behind others, b) if there is consistency in scores in a store (fluctuations may mean that the department standards go up and down – fluctuation may also indicate that inspectors are scoring differently.

What constitutes a numerically good score is subject to some debate. Generally it is believed that any score above 40 is an acceptable score. Below 40, the produce manager and assistant produce should be engaged in a challenging debate in which they outline a plan of action to address issues that were identified during the inspection.

Regardless of the actual score, the results of the inspection should be shared and discussed with the Produce Manager and Assistant Manager as soon as possible.

Follow up from Inspections

- Any issues identified on the inspections should be corrected immediately by the produce manager and her/his assistant;
- Each produce manager is expected to come to PnL meetings with a summation of the inspections that occurred in her/his department over the last month. They should identify areas of success and areas that need improvement, including what is being done to correct issues identified on the inspection.

Checklist Category	Details about how to inspect	Points
Quality and Rotation Practices:	In this category, we are looking for negatives. The assumption is that we are largely delivering on our promise to the customer of "the highest quality 100% organic produce" and that poor quality issues are rare. Specifics about what products to inspect and what to look for: • **Strawberries-** mushy, moldy, juicing • **Blueberries-** shriveled, moldy, juicing • **Blackberries-** shriveled, moldy, juicing • **Raspberries-** moldy, oozing, juicing • **Apples-** bruised, nicked up (stem from an apple punctures the skin of another one) • **Pears –** over ripe, shriveled necks, significant scaring, punctured skins (caused by stems of other pears digging into very ripe fruit)	**4 points deducted for each category that doesn't meet our standards**

	• **Bananas-** facing up, spotting • **Citrus-** mold, soft spots, discoloration, skin may be very dried out and hard (lemons, limes) • **Potatoes-** soft, green, sprouting (eyes of the potatoes have vegetative growth) • **Tomatoes-** Soft, oozing (look for fruit flies) • **Cilantro-** Bunch size is adequate. Look for slimy leaves and wilted/droopy bunches. • **Salads (Packaged)-** within 3 days of expiration date • **Carrots w/tops-** browning stems, bunched tops are adequate (3 or more on each carrot), no broken carrots in the bunch • **Cabbage-** brown butts, pale/anemic, torn leaves. • **Lettuce-** brown butts, slimy, browning, lots of torn leaves • **Chards-** slimy, browning, lots of torn leaves • **Scallions-** slimy leaves, uneven tops • **Roots-** soft, wrinkled • **Squash (Zucchini & Yellow Squash)-** wrinkled, soft • **Eggplant-** wrinkled, soft, bruises • **Peppers -** wrinkled, soft, pock marks, discoloration (for example red coloring on green peppers) • **Mushrooms-** soft, brown/dark, slimy, broken up • **Loose spring mix & spinach-** wilting, decaying leaves	
	Additional quality and/or rotation issues on products <u>not already inspected above</u>.	**4 points deducted per product with quality and/or a rotation issue –** A numerical value must be given in this section for deduction accuracy. For example: if there are 2 products identified, then the number 2 needs to be inputted for a total deduction of 8. If an x is put in to denote the 2 products, only 4 total points will be deducted.

Rotation issues to look for:

- ***<u>Is product being rotated?-</u>*** When stockers are rushed, not trained properly, or don't care about doing a good job, they put new product directly on top of older product. To tell if rotation is happening the best thing to do is "dig down" into displays on both the wet and dry tables and see what is underneath. <u>Some tell tale examples of</u>

when rotation is not happening correctly:

1. On a display of broccoli, you might find a few beat-up bunches from a different grower than the majority of nice bunches on top;
2. On a display of potatoes, you might find soft or sprouting potatoes on the bottom.
3. Even with packaged items like berries, salads, and sprouts, you might find older dates on the salads towards the back of the display;
4. Berries and sprouts that are noticeably older (poor quality) behind fresher product.

Special Note – Always inspect wet table items left on the display over-night such as summer squash, zucchini, peppers, eggplant, mushrooms, etc.

If you get the opportunity, watch the staff as they stock.

- ***Cutting our losses- no mixed/poor quality product-*** Sometimes a display will have a noticeable difference in the quality of product. This happens when a stocker is rotating, but not culling. Rotating poor quality product to the top of the display severely deters sales of the fresh/good product that was recently put up. Doing this is actually worse than not rotating at all, as it just brings the poor quality product into full view for customers. It is better to simply cut our losses at this point by shrinking the mediocre/older product. Lesson Learned - Customers who want the best product are smart enough to dig through the display and find the good product, so we end up shrinking out the old product in the end anyway!
- ***Layering on top rather than pulling product forward-*** The proper way to rotate is to remove existing product, stock the fresh product, and then put the older product (which still meets our high quality standards) on top. What we don't want to do is pull the old product forward and then put the newer product behind it. It seems that this most frequently happens with mushrooms, btw.
- ***All wet-table product that needs cutting is being brought to the back when fresh product is put up (look for old product on bottom and fresh on top)-*** For the most part, you can tell by looking at the quality of the product on top whether or not it was re-cut when rotated. What you'll find when product only gets rotated and not re-cut and hydrated is inconsistent coloring on the butts of products in the display. This also applies to root vegetables- when not re-prepped, the stems will become brown/slimy and the product will start to shrivel. From experience, I have found that this problem is most easily identified with lettuces, cabbage, celery, and scallions (scallions are alive and will start growing unevenly on the tops if not cut for a couple days). Look at those butts!

Checklist Category	Details about how to inspect	Points
Wet Table:	**Product is well hydrated-** Fail is noted if Items on the wet table are not well hydrated. The best way to tell if products are well hydrated is when the roots are completely dry – at that point spraying is over-due.	**10 points deducted**
	None of the bottom table is showing	**5 points deducted**
	Display fixtures are clean - This includes shelves, baskets, containers, etc.	**10 points deducted**

Checklist Category	Details about how to inspect	Points
Dry Table	• **Not over stacking products-** On the dry table, are there products that when ripe should not be over-stacked as it can damage the product – tomatoes, kiwi, avocado, peaches, nectarines, plums, pears, bananas, etc.	**10 points deducted**
	• No baskets on the dry table are empty	**5 points deducted**
	• **Display fixtures are clean-** tables, baskets, containers, etc.	**5 points deducted**

Checklist Category	Details about how to inspect	Points
Signage:	• ***Each item has a sign and each sign has an item-*** First, look at each product and make sure there is a sign. Then, look at each sign to see if we have the product up.	**3 points deducted per error – A numerical value must be given in this section for the deduction total accuracy. For example: if there are 4 missing signs then the number 4 needs to be inputted for a total deduction of 12. If an x is put in to denote the 4 missing signs, only 4 total points will be deducted.
	• ***Straight within close proximity to product-*** signs sometimes end up far away from the product, which is almost just as bad as not having a sign at all.	**2 points deducted per error** – A numerical value must be given in this section for deduction total accuracy. For example: if there are 4 misplaced signs then the number 4 needs to be inputted for a total deduction of 8. If an x is put in to denote the 4 missing signs, only 4 total points will be deducted.
	• ***Looks professional- neat writing, no smudges/smears, no fading-*** prices on signs should be written by someone with great hand-writing (can be anyone- a	**5 points deducted**

	cashier, bagger, customer service, etc.).	
	• ***<u>Origin Accuracy- origin/local, specific variety-</u>*** Product that is local should have a local signs denoting this product. All signs need to list the origin of the product. Abbreviations are never accepted on imported products (in other wards products from Israel must have the country name written out completely not the abbreviation ISR. All descriptions on the sign must be accurate, including variety. For example, CA pink grapefruit might have a sign that says "rio star grapefruit", etc.	**4 points deducted per error – ** A numerical value must be given in this section for deduction total accuracy. For example: if there are 4 origin signs then the number 4 needs to be inputted for a total deduction of 16. If an x is put in to denote the 4 missing signs, only 4 total points will be deducted.
	• ***<u>Pricing Accuracy (pricing on signs matches prices in catapult-</u>*** Review 20 items (or more) to make sure the price on the sign matches what's being charged at check-out. Some easy ways to check accuracy: 1. Reprint the receipt of a customer who has purchased lots of produce and check their receipt against the signs, or 2. You can also walk through the department and randomly select 20 items, write down the prices and then review in catapult.	**15 points deducted**

Checklist Category	Details about how to inspect	Points
Department Appearance:	• ***<u>Floors are free of sticky spots, debris, etc.-</u>*** This is particularly a problem in summer and fall with grapes. On an ongoing basis, look at for pieces of lettuce and other greens debris.	**5 points deducted**
	• ***<u>Aisles are not blocked and all products are accessible-</u>*** 1 small cart is allowed on the floor at a time and must not be left unattended. No more than 2 people should be working in entire department M-F. <u>Note:</u> We should not be selling product on the pull-out bottom shelves of the dry tables.	**5 points deducted**
	• ***<u>Floor is dry - or wet floor signs are out-</u>*** make sure wet floor signs are not left on floor well after the floors have dried.	**5 points deducted**

Checklist Category	Details about how to inspect	Points
Produce Quiz	• ***<u>Item Rotation –</u>*** Produce quiz items are changed frequently (at least 3 times per week)	**5 points deducted**

	• ***Results of quiz is posted on a weekly basis –*** Quiz results are posted for easy verification of cashiers that are taking quiz, as well as, those that are not.	**5 points deducted**
	• ***Products on display in the quiz are fresh-*** Items displayed as part of the quiz should not be dried out to the point that they do not resemble the product as it will arrive to the register.	**5 points deducted**

Checklist Category	Details about how to inspect	Points
Miscellaneous:	• **Passive Sample Tray** is maintained (sample dome is clean, trash can provided, sample is clearly labeled, at least half full)	**5 points deducted**
	• Bags are in-stock and marked "small" and "large"	**5 points deducted**
	• **Has the PLU sheet for cashiers been updated in the past 7 days?** PLU sheets should be updated at least every 7 days. It is very easy to tell if this has been done by first checking the date in the header at the top or bottom of the page. Also, if there is more than a handful of items hand written in the margin, it is fair to assume that too long a period has passed since the sheet was last updated	**15 points deducted**

Checklist Category	Details about how to inspect	Points
General Comments	• ***Products you would not buy due to quality and/or price?-*** Products specific feedback about products that they would not buy because of either quality or price.	• No points deducted
General Comments	• ***At the prep area, how many cases of perishable product are not in the walk-in?-*** Sometimes deliveries are not put away for an extended period, which ultimately has a detrimental impact on quality of wet table products. For this reason it is a great thing to keep an eye on	• No points deducted
General Comments	• ***Product Variety?-*** No points are deducted in this section, but when a total # of local products and all products are recorded; a percent breakdown of local variety in the department will be generated. This is useful when tracking overall variety in the department	• No points deducted
General Comments	• Opportunity to share any other pertinent insights about the department as observed during the inspection.	• No points deducted

Maintaining an Outdoor Display

While seasonal displays are primarily set in the morning, it is important for all produce staff to recognize the importance of maintaning the display througout the day. This checklist can be applied to Melon/Apple bins, Soil displays, or Fall Squash displays.

Setting the display

- [ ] Set aside space near the entrance of the store
- [ ] Gathered any display tools (baskets, hay bales, other props)

Morning Maintenance

- [ ] Reorganized the display, consolidating any items that sold down during the previous day
- [ ] Swept the display area, wiped down any ledges or shelving
- [ ] Restocked display with any new product from that mornings delivery
- [ ] Updated PLU Sheet for Cashiers with any new items
- [ ] Checked prices for all items in display
- [ ] Added, Reorganized, and Removed any signs

Display Maintenance During Store Hours

- [ ] Reorganized the display as needed
- [ ] Removed or Reorganized signs as needed
- [ ] Swept the display area, Reorganized any display tools
- [ ] Culled any marginal items, Restocked all low baskets/displays
- [ ] Consolidated items as needed

Display Maintenance at Closing

- [ ] Moved product and display tools inside as necessary (cold, possibility of damage or theft)
- [ ] Swept display area, Wiped down any ledges

Plant Care Checklist

Plant care is the responsibility of all members of the Produce department, from opening to close. Please use the checklist below to guide you through the basics of the plant care process.

Receiving plants

- [ ] Checked for damaged plants, yellow leaves. Returned or set aside any unusable plants
- [ ] Organized a display area/Created space for plants in current display

Morning Plant Maintenance

- [ ] Watered Plants
- [ ] Moved plants to a sunny area to receive light
- [ ] Reorganized plant display, regrouped similar plants, removed damaged or dying plants
- [ ] Swept plant display area, wiped down shelving/plant racks, rearranged signs
- [ ] Updated cashier PLU sheet to reflect any new plant PLUs
- [ ] Checked pricing on all plants

Plant Maintenance During Store Hours

- [ ] Watered Plants as needed
- [ ] Checked for damage or dying plants
- [ ] Moved plants to a sunny area to receive light, if needed
- [ ] Swept plant display area, wiped down shelving/plant racks, rearranged signs
- [ ] Consolidated plants as the display is sold down

Plant Maintenance at Closing

- [ ] Watered Plants if needed
- [ ] Moved delicate plants indoors, if temperature drops
- [ ] Swept plant dispay area, wiped down shelving/plant racks, rearranged or removed signs

MOMs Video Training Series

Below is a list of all Produce Videos that are a apart of the MOMs Video Training Series.

Conducting Produce Inventory
Instructions on Conducting Produce Inventory, including details on preparing for inventory, counting items, entering items into Catapult, and reports to find the inventory total.

Produce Weekly Reports
Instructions on analyzing the weekly On Hand and Item Net Optimized (Margin) reports, and how to fix any errors that are found.

Receiving Produce Invoices
Instructions on how to prepare to receive invoices, receiving Four Seasons and Alberts invoices by importing, and running the correct reports after receiving.

Appendix A – Search Using Previous Produce Training Binder Table of Contents

Since some documents have been removed from the 2012 edition of the Produce Training Manual, some items from the 2011 Table of Contents may not link to a current document. If you would like to view an older version of the document, please email Alvin.

Table of Contents 2011

Appendix B – Search By Topic

Click any link below to view that section of the training manual.