Vendor and Purchasing

A practical system for supplier comparisons, approved orders and receiving discrepancies.



PRACTICAL GUIDE / WORKED EXAMPLES / EDITABLE TEMPLATES

Tools for independent restaurant owners and managers

Start with one practical change

Buy against a clear specification, record the approval and close the loop at delivery. These five guide pages and six editable sheets focus on supplier selection, purchasing controls, receiving and credits. Use your inventory process to determine quantity; use this toolkit to control how that purchase is made.

Inside this toolkit

1. Define the item and the buying authority
2. Compare the cost of equivalent usable product
3. Move from request to approved order
4. Receive against the order, not memory
5. Close credits and review supplier performance

Make the templates your own

Read the short guide, work through the example, and choose the forms you need. The printable forms follow the guide. The companion Word file lets you change instructions, add your restaurant name, and replace every blank or bracket before use. Duplicate a clean copy for each new shift, campaign, employee, or event.

Edition October 2026. Examples are original and hypothetical. This is an operating resource, not legal, employment, accounting, or food-safety advice. Confirm location-specific requirements and get qualified review where needed.

Define the item and the buying authority

Before requesting prices, write the item specification. Include the product type, acceptable grade or quality attributes, pack size, unit, intended use and required documentation. A lower price is not a fair comparison if the portion yield, product formulation or package size differs.

- Assign roles: requester proposes need; buyer checks the specification and quote; owner or authorized approver approves; receiver verifies delivery; accounts reviewer matches the invoice. In a small team, one person may hold multiple roles, but the checks still need to happen.
- Keep an approved supplier and item reference. Record contact details, delivery pattern, minimums, ordering cutoff and escalation route.
- Define who can approve substitutions and price changes. An apparently equivalent ingredient can change a recipe or allergen information.
- Use supplier payment and account systems securely. Do not copy bank details, card numbers or account passwords into shared purchasing sheets.
- Specify what requires renewed approval: different supplier, changed item, higher total, revised terms or an unplanned commitment.

Scope: these are internal business-planning tools, not contracts, purchasing authority, legal advice or a complete supplier-approval program. FDA’s Food Code is a model; the PIC must apply locally adopted source, receiving and record requirements. A competitive quote does not establish food-safety acceptability. (Source 1)

Start with ten frequently purchased items and one clear approval route. Do not redesign the whole supplier list before the team can follow a single order from request to invoice.

Compare the cost of equivalent usable product

Ask suppliers to quote the same specification and quantity basis. Record the quote date, validity, delivery charge, minimum order, lead time and substitution policy. Compare the total delivered cost, not just the number printed beside the case.

Hypothetical offer	Pack price	Allocated delivery	Usable quantity	Cost / usable lb
Supplier A, 20 lb case	$44	$4	18 lb	$2.67
Supplier B, 25 lb case	$60	$0	22.5 lb	$2.67

Both examples assume a verified 90% usable yield. Supplier A costs ($44 + $4) ÷ 18 = $2.67 per usable pound; Supplier B costs $60 ÷ 22.5 = $2.67. The larger case is not automatically cheaper or better. Check that the full quantity can be used safely and that delivery allocation is consistent.

- Use actual yield tests or known specifications, not optimistic percentages supplied without verification.
- Identify whether prices include or exclude applicable taxes, fuel surcharges and other charges. Keep the comparison basis consistent with your accounting policy.
- Compare reliability, quality consistency and response to problems alongside cost. State the evidence rather than assigning unsupported ratings.
- Keep a qualified backup for critical items where feasible, with reviewed alternatives rather than emergency improvisation.
- Do not split orders to avoid an approval threshold or hide the full commitment.

Decision check: if the preferred supplier is more expensive, write the operational reason, such as a smaller usable pack or reliable delivery, and identify how you will verify that benefit.

Move from request to approved order

Treat the internal purchase-order draft as a request for approval, not a message ready to send. Issuing an order can create obligations. Only the owner or authorized buyer should release the separately reviewed order through the restaurant’s approved purchasing process.

Stage	Record to retain	Control
Request	Item, need date and quantity basis	No duplicate request
Check	Current quote and specification	Units and total checked
Approve	Approver, amount and scope	Before release
Release	Actual order and reference	Authorized sender only
Confirm	Supplier acknowledgement	Differences reapproved
Receive / match	Receipt and invoice records	Discrepancies resolved

- Review the complete total, delivery details, payment terms, cancellation restrictions and any agreement before committing. This toolkit does not supply those terms.
- Record the supplier’s confirmation and expected delivery. An order sent is not an order accepted on the same details.
- Recheck changed quantities, substitutions, delivery dates and price differences before accepting them.
- Use one order reference across the request, confirmation, receiving record and invoice.
- If the supplier misses the needed date, involve the authorized buyer before placing a duplicate emergency order.

Worked example: a request for four cases of six units means 24 units, not four units. Record both the order unit and pack conversion. Have the approver review the full amount and any delivery charge before release.

Receive against the order, not memory

Prepare the receiver with the approved order and the PIC’s receiving procedures. Compare supplier, item, pack size, quantity and agreed commercial details. Complete required safety checks using approved instructions and instruments; this worksheet intentionally contains no temperature thresholds.

- Keep ordered, delivered and accepted quantities distinct. Record rejected or held goods under the PIC’s procedure and prevent them being treated as usable stock.
- Photograph discrepancies only under your normal policy, and link the evidence to the order and invoice. Keep relevant product identifiers and required records.
- Record the exact issue: short quantity, wrong pack, unapproved substitute, damaged packaging or price difference. “Bad delivery” will not resolve a credit.
- Notify the authorized buyer promptly. Record what was requested from the supplier, what was agreed and when the next update is due.
- Match the invoice to the approved order and accepted receipt before payment approval. Never alter the original record to make a mismatch disappear.

Illustrative example: ten cases were ordered, nine arrived and one of those nine was rejected under the approved process. Record 10 ordered, 9 delivered, 8 accepted and 1 rejected. A claim may concern two cases, but verify the invoice and supplier resolution before assuming a credit.

Check: can a manager who was not present understand the discrepancy, locate the evidence and see who owns the resolution? If not, the receiving record is incomplete.

Close credits and review supplier performance

Maintain an open-discrepancy list. A promised credit is not a received credit. Record the supplier reference, expected amount, due date, actual credit note and how it was applied. Reconcile it with your accounting records before closing the issue.

Measure	Definition for this toolkit
On-time, in-full deliveries	Deliveries meeting both agreed date/window and quantity ÷ deliveries due
Unapproved substitutions	Count and affected order references
Accepted quality discrepancies	Issues under your specification, not assumptions
Open credit value	Verified claims not yet reconciled
Total comparable cost	Delivered cost on the same unit and scope

Example: 18 of 20 due deliveries arrive on time and in full, giving 90%. Inspect the two misses by operational impact. One late critical ingredient may matter more than several small paperwork issues. Do not use a headline rate as proof of supplier suitability.

- Review the suppliers and items that caused actual disruption, not just the largest invoices.
- Agree on one improvement and a verification date. Retain evidence of changed performance.
- Assign responsibility for relevant supplier and official recall notices. FDA describes product identifiers in recall notices and points to FDA and USDA recall sources; use the actual notice and PIC response procedure. (Source 2)
- Keep required traceability and receiving records accessible under the applicable retention policy. This worksheet does not determine legal record requirements.
- Requalify substitutions or new suppliers through the approved process before relying on them.

Next step: review the next order from draft through invoice and close one unresolved discrepancy before expanding the system.

Supplier and item specification card

Supplier: _____ Item / SKU: _____ Version / date: _____ Owner: _____

Specification or operating detail	Approved information
Product / quality / intended use	_____
Pack size / order unit / conversion	_____
Required product or source records	_____
Delivery days / cutoff / lead time	_____
Minimum order / quoted charges	_____
Contact / escalation record reference	_____
Substitution review requirement	_____
Backup supplier / item reference	_____

PIC source / receiving procedure reference: _____

Commercial review by: _____ PIC review by: _____ Date: _____

Next review date / trigger: _____

Store account credentials and financial details only in approved secure systems.

Supplier comparison worksheet

Item specification: _____ Quantity basis: _____ Comparison date: _____

Comparison point	Supplier A	Supplier B	Supplier C
Pack / order unit	_____	_____	_____
Quote price / expiry	_____	_____	_____
Delivery / other charges	_____	_____	_____
Verified usable quantity	_____	_____	_____
Cost per usable unit	_____	_____	_____
Minimum / lead time	_____	_____	_____
Reliability / quality evidence	_____	_____	_____
Unresolved conditions	_____	_____	_____

Cost basis: (pack cost + consistently allocated charges − confirmed applicable credits) ÷ usable quantity. Keep taxes and units consistent.

Preferred option and reason: _____

Specification / PIC review complete: ___ Full commitment reviewed: ___

Decision approved by: _____ Date: _____

Purchase-order planning draft

NON-BINDING INTERNAL DRAFT. Not a contract or an order for supplier acceptance. Owner approval is required before any separately reviewed order is issued. Do not send this worksheet to a supplier.

Draft reference: _____ Requester: _____ Date: _____ Supplier: _____

Needed date / destination: _____ Quote reference / expiry: _____

Item / spec reference	Qty	Order unit / pack	Unit price	Line total
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

Subtotal: _____ Delivery / charges: _____ Applicable tax: _____ Total / currency: _____

Need and quantity basis / duplicate-order check: _____

Terms requiring review / substitution restrictions: _____

Owner approval: pending / approved / declined. Name: _____ Date: _____ Limit: _____

Actual authorized order reference, entered only after release: _____

Order approval and confirmation tracker

Order reference: _____ Supplier: _____ Responsible buyer: _____

Workflow step	Owner	Date / evidence	Status
Need and specification checked	_____	_____	_____
Current quote / full total checked	_____	_____	_____
Owner approval recorded	_____	_____	_____
Actual order released by authority	_____	_____	_____
Supplier confirmation compared	_____	_____	_____
Changes reapproved if needed	_____	_____	_____
Receiver informed / records ready	_____	_____	_____
Receipt / invoice / credit matched	_____	_____	_____

Confirmed delivery window: _____ Supplier confirmation reference: _____

Difference from approved order: _____

Decision / approving authority / date: _____

Next action / owner / due: _____

Receiving discrepancy and credit log

Order / invoice reference: _____ Supplier: _____ Received at: _____

Receiver: _____ PIC procedure and record reference: _____

Item / identifier	Ordered	Delivered	Accepted	Discrepancy
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

Held or rejected quantity / approved disposition record: _____

Evidence reference / exact issue: _____

Supplier notified by / date / response: _____

Claim amount / currency: _____ Expected resolution: _____

Actual credit note / amount / applied invoice: _____

Next owner / due: _____ Reconciled and closed by / date: _____

Do not treat a promised credit or an unresolved receiving exception as complete.

Supplier performance review

Supplier: _____ Review period: _____ Reviewer: _____

Measure	Result	Evidence / order references
On-time, in-full deliveries / due	_____	_____
Unapproved substitutions	_____	_____
Specification discrepancies	_____	_____
Open credit value / oldest item	_____	_____
Comparable delivered unit cost	_____	_____

Most significant operational impact: _____

Improvement requested / agreed / date: _____

Responsible buyer / verification date: _____

Recall-notice responsibility and current contact route verified: _____

Backup supplier readiness / unresolved review: _____

Decision: retain / improve / reassess. Approved by: _____ Date: _____

Sources and use notes

Official reference sources were checked during preparation in October 2026. Numbered source mentions in the guide refer to the entries below. Original worksheets, examples, and calculations are 63Labs planning tools, not material endorsed by these organizations.

1. FDA Food Code

The Food Code is a model for adoption by jurisdictions; the establishment must verify the locally applicable rules. Accessed 23 October 2026.

https://www.fda.gov/food/retail-food-protection/fda-food-code

2. FDA: Food Recalls: What You Need to Know

Official recall sources, product-identification details and following product-specific recall instructions. Accessed 23 October 2026.

https://www.fda.gov/food/buy-store-serve-safe-food/food-recalls-what-you-need-know

Before use

Replace hypothetical values with verified restaurant data. Confirm responsibilities, approval limits, dates, offer terms, and local requirements. Do not send drafts, promise prices, or change operating procedures until the appropriate owner has approved them. The pack does not include legal contracts or ongoing updates.