Menu Analysis Application
Tour Guide for Customers

Sysco Market

Good things come from Sysco
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welcome to menu analysis

The Menu Analysis application is an online tool for creating menus and plates that helps you manage food costs and maximize profits.

Menu Analysis provides easy access to all product, plate, and menu information and associated cost and profitability calculations. You can quickly perform plate analysis, then choose and order attractive alternative products to help you save time and money.

With Sysco Menu Analysis you can:
- Create menus and plates
- Create plate analysis simulations to ensure target food costs and profitability
- Easily print plates for reference
To access Menu Analysis from Sysco Market:

1. Select the Order heading. *Sysco Market Express Ordering* displays.

2. If you have access to multiple accounts, select the account.

3. Select the Menu Analysis heading. The Menu Analysis application displays.
Indicators and buttons display across the Menu Analysis application. The list below describes these indicators and buttons.

**Alert**
Under the Menu heading, any menu that does not meet the percentage for maintaining target food cost displays an alert. Under the Plates heading, any discontinued items display an alert next to the product. Any plate that does not meet the percentage for maintaining target food cost displays an alert. Hover over an alert to view an explanation of the alert.

**Add Ingredient**
Click to add ingredients from your custom ingredients, your order guide, or the product catalog.

**Add Ingredient Recipe**
Click to add an ingredient recipe to your plate.

**Create New**
Click to create a new plate.

**Import Plate**
Click to add existing plate details to a new plate.

**Add to Menu**
Click to add the selected plate to a new or existing menu.

**Update Pricing**
Click to update pricing information for items within a plate or plate analysis.

**Add to**
Click to add ingredients to a new or existing plate.

**Upload Image**
Click to add a photo of your plate.

**Remove**
Click to delete an existing plate or ingredient.

**Move Up**
Move item up in a list of ingredients.

**Move Down**
Move item down in a list of ingredients.

**Sysco**
Sysco product brand.
Select the **Home** icon to return to the **Menu Analysis** homepage.

View custom-created or shared menus, or create new menus from the **Menus** heading.

View custom-created or shared plates, or create new plates from the **Plates** heading.

Click the **Ingredients** heading to access Sysco ingredients in your existing recipes, the order guide, or product catalog, or to access your custom ingredients.

Click the **Get Started** button to create a new menu or plate.

Use the **Search Product Catalog** field to search for products to add to your new or existing plate.

Switch your account by expanding the **Locations** heading.

Note: The **Locations** heading is only visible for those customers who have access to multiple accounts.
Click to display the Plates Summary page.

Create a new plate by adding products and custom ingredients.

Change the target food cost percentage.

Create a new plate using plate details from an existing plate.

Click a plate category to view all My Plates, Sysco Recommended Plates, or Shared Plates.

Click a plate name to display the Plate details screen.

Create a new plate using plate details from an existing plate.
my plates page

Click to display the My Plates page.

Add plates to a new or existing menu.

Change how and which columns display in the grid.

Group plates by menu or category.

Select the checkbox to copy, delete, share, send, print, or order a plate.

All created or imported plates display in the plate grid.

The alert icon indicates plate exceeds target food cost.
plate management

With Menu Analysis, you can create plates, perform menu analysis, and easily print or email the results.

In this section, the following topics are detailed:
• Adding and deleting plates and plate details
• Determining the difference between Sysco products and custom ingredients
• Adding and deleting products, ingredients, and recipes to plates
• Entering products and ingredient attributes
• Scaling plates
• Sending or sharing plates
adding and deleting plates

As you start creating new plates, the application displays them in the Plate grid. You can group them into menus (see Creating and Editing Menus). Use the Plate details screen to create plates by adding Sysco products, custom ingredients, and existing plates.

To add a plate:

1. From the Menu Analysis homepage, click Get Started.
2. Select the Create a new Plate radio button.
3. Type a name for your new plate in the Enter Plate Name field.
4. Click Next. The Plate details screen displays, where you can continue customizing your plate.

You can also add a plate from the Plates Summary page by clicking Create New.

To delete a plate:

1. From the My Plates page, select the checkbox next to the plate.
2. Click Delete. A delete confirmation window displays.
3. Click Yes.
adding plate details

To customize your plate on the Plate details screen:

1. In the Name field, enter a plate name.
2. From the Category drop-down list, select a category. For example, Appetizer, Entrée, Side, etc.
3. Click Add Ingredient or Add Ingredient Recipe to add ingredients to your plate.
5. Enter Plate Instructions.
6. Click Save.
When creating a plate, you can add Sysco products, custom ingredients, or a mixture of both. To add ingredients to your plate, click the Add Ingredient button.

1. Select Sysco Ingredients to add Sysco ingredients that are currently used in your plates or ingredient recipes.

2. Select Custom Ingredients to add new or existing custom ingredients to your plate. If you select a new custom ingredient, you will be able to manually add ingredient information.

3. Select Order Guide or Browse Catalog to add Sysco products. Sysco provides product information such as volume, weight, and portion that you can easily add to a plate for analysis.
adding Sysco products

To begin building your plate, use the Plate details screen to add Sysco products, custom ingredients, and existing plates.

To add Sysco products from the Catalog:

1. Click Add Ingredient.
2. Select the Browse Catalog radio button.
3. Click Submit. The application displays the Product Catalog screen.
4. Search for products by expanding the category in the left pane.
5. Select the checkbox next to the items to add to the active plate.
6. Click Add to. The Plate details screen displays.
7. Repeat steps 1–6 to add more products to the active plate.
8. Click Save to save products to the active plate.

Tip: To delete an ingredient from a plate, click the Delete icon for the ingredient in the plate.
adding Sysco products

To add Sysco products from your Order Guide:

1. Click Add Ingredient.
2. Select the Order Guide radio button.
3. Click Submit.
4. The application displays 2 months of order history. To view items older than 2 months, select a range (such as Last 2 Months, Last 3 Months, Custom, etc.) from the Filter Order Guide dropdown. You can view your order history as far back as 14 months. You can also filter your displayed results by Previously Ordered, Category, Brand, Pack, Size, Stock Indicator, and Storage type.
5. Select the checkbox next to the items to add to the active plate.
6. Click Add to. The Plate details screen displays.
7. Repeat steps 1–6 to add more products to the active plate.
8. Click Save to save products to the active plate.
adding Sysco ingredients

The Add Ingredient button allows you to quickly add Sysco ingredients that you have currently used in your existing plates or ingredient recipes.

To add existing Sysco ingredients to a plate:
1. Click the Add Ingredient button.
2. Select the Sysco Ingredients radio button.
3. Click Submit. The Sysco Ingredients list displays all ingredients that are currently used in your plates or ingredient recipes.
4. Select the checkbox next to the items to add to the active plate.
5. Click Add to. The Plate details screen displays.
6. Repeat steps 1–5 to add more products to the active plate.
7. Click Save.
adding custom ingredients

The Add Ingredient button allows you to add custom ingredients to plates. For example, you can add ingredients from a local farmers market. Use the Custom Ingredients screen to add new custom ingredients or select existing custom ingredients from the ingredient list.

To add existing custom ingredients to a plate:
1. Click the Add Ingredient button.
2. Select the Custom Ingredients radio button.
3. Click Submit. The Custom Ingredients list displays all ingredients created by you that are currently used in your plates or ingredient recipes.
4. Select the checkbox next to the items to add to the active plate.
5. Click Add to. The Plate details screen displays.
6. Repeat steps 1–5 to add more products to the active plate.
7. Click Save.

To create new custom ingredients:
1. From the Custom Ingredients list, click Create New.
2. Enter the ingredient name, quantity, pack, size, etc.
3. Click Save. The ingredient is added to the Custom Ingredient list.

To delete custom ingredients:
1. From the Custom Ingredient list, select the checkbox next to the ingredient to delete.
2. Click the Delete (red X) icon.
3. Click Yes at the confirmation screen.

Important: Deleting a custom ingredient from the Custom Ingredient list deletes the ingredient from ALL plates/ingredient recipes within Menu Analysis.
adding ingredient recipes

The Add Ingredient Recipe button allows you to add existing recipes or a subplate. For example, click the Add Ingredient Recipe button to add an existing side salad plate to a steak plate.

To add an existing ingredient recipe:

1. From the Plate details screen, click the Add Ingredient Recipe button. The Add Ingredient Recipe From screen displays.
2. Select Existing, and click Submit. The Add Ingredient Recipe screen displays.
3. Select the All category to view all existing ingredient recipes, or select a category.
4. Select the Ingredient Recipe to add to the active plate, and enter a quantity.
5. Click Add.
6. Click Save to save the ingredient recipe to the active plate.
To add a new ingredient recipe:

1. From the **Ingredient Recipes** screen, click ✪ Create New.

2. In the ✬ Name field, type a name for the Ingredient Recipe.

3. From the ✫ Category drop-down menu, select a category. For example, Appetizer, Entrée, Side, etc.

4. From the Unit of Measure drop-down menu, select the appropriate value.

5. Type the number of servings, number of plates served in selected time frame, and a description.

6. Click ✪ Add Ingredient or Add Ingredient Recipe to add ingredients to your ingredient recipe.

7. Add ✫ Waste and Labor costs.

8. Enter any ✪ Instructions or notes for the Ingredient Recipe.

9. Click ✪ Save.
entering product and ingredient attributes

Use the Plate details screen to complete product and ingredient attributes according to plate specifications. Menu Analysis calculates unit cost based on portion, weight, quantity, or volume.

To enter product and ingredient attributes:

1. From the Plate details screen, click the arrow next to the product or ingredient to display details (QTY, QTY Unit of Measure, or Yields).
2. Complete the fields.
   - Review to ensure that the portion, weight, and volume values assigned to Sysco products meet your plate specifications.
   - To calculate unit cost for custom ingredients, enter one of the following fields: portion, weight, or volume. You must enter these values manually.
3. Click Save.

Note: If the item exists in multiple plates, you are prompted to select if you want to save changes to the product/ingredient locally or globally.
   - Select Locally to change the attributes for this product/ingredient ONLY within the active plate.
   - Select Globally to change the attributes for this product/ingredient in ALL plates/menus containing the product within Menu Analysis.
Use the Servings field to easily scale plate products and ingredients according to desired servings produced. Scaling adjusts the unit cost as well as the analysis component.

To scale a plate:

1. From the Plate details screen, select the Scale checkbox next to each product and ingredient.
2. Enter a value in the Produces field.
3. Change QTY Unit of Measure, which represents the amount that the plate creates. For example, vegetable soup produces 5 GAL.
4. In the Servings field, enter the number of servings. For example, a 5 gallon quantity of vegetable soup produces 100 servings.
5. Click Save.

![Screen capture of Sysco Market showing the Plate details screen with scaling fields and instructions.](image-url)
sending plates

Use the Send feature to send a copy of your selected plate to other users. Sending a plate gives the user their own copy of the plate, which they can save and modify. Any modifications you make to your plate after sending it will not be visible to other users.

To send a plate:
1. From the My Plates screen, select the checkbox next to the plate to send.
2. Click Send.
3. On the Send Plate screen, select the checkbox next to the account and users to send the selected plate to. Note: You must have access to the account.
4. Click Send.

5. The Success message displays. Click OK.
sharing plates

Use the Share feature to share your plate with all users with access to the account. The shared plate will display in the Shared Plates category, and they will not be able to edit the plate details.

To share a plate:

1. From the My Plates screen, select the checkbox next to the plate to share.
2. Click Share.
3. On the Share Plate Options screen, click Share.
4. The Success message displays. Click OK.

The shared plate now displays in the Shared Plates category. Other users can view the plate, however they cannot modify the plate.

Tip: To unshare the plate, select the plate and click Unshare > Do Not Share.
target food cost and profitability

To help minimize cost and maximize profitability, you can set an ideal percentage for maintaining target food cost for all plates and menus created in Menu Analysis.

Menu Analysis compares the target food cost percentage to the total food cost percentage of each plate.

If the plate has a food cost percentage that is higher than the target food cost percentage, Menu Analysis displays the Food Cost Alert icon for the plate in the Info Column.

If a menu contains plates that exceed the target food cost percentage, the Food Cost Alert icon displays in the Info Column for the menu.

If either icon displays, you can analyze the plate/menu and address items that fall outside of the parameter settings to increase profitability.
adjusting target food costs

To set the Target Food Cost indicator:

1. From the Menus or Plates Summary screen, enter the desired percentage in the Target Food Cost % field.
2. Click outside the window. The application displays the Confirmation screen.
3. Click Yes to change the target food cost.

Tip: Any change to the target food cost will reflect on both the Menus Summary screen and Plates Summary screen. The menu and plate target food cost is always in sync.
After you specify the quantity, product, and ingredient attributes, Menu Analysis automatically calculates total food cost and profitability. To calculate profit, you must enter a Menu Item Price. Use the Analysis component to change these figures to meet business needs such as profit, labor, and waste.

To calculate plate profitability:

1. From the Plate details screen, ensure all products and ingredients have QTY and QTY Unit of Measure and that the Weight, Volume, or Portion fields are completed.
2. In the Analysis column, enter a menu item price.
3. Using the arrow steppers, add Waste, Labor, and Other costs.
4. Click Save.
You can perform plate analysis simulations to determine which product or ingredient in a plate controls cost and increases profitability. These what if scenarios provide a side-by-side comparison between the actual and proposed plate and forecast profitability for the day, week, month, or year.

Use plate analysis to help you make informed decisions about product choices and determine the plates to include in your menu.

In this section, the following topics are detailed:

- Performing a plate analysis
- Updating pricing
- Copying a plate
- Importing a plate
- Creating a plate PDF
- Creating and editing menus
- Creating an open order
Performing a plate analysis allows you to identify ingredients and products that negatively affect profitability and then select alternatives to increase profitability.

For example, you may be using whole-head lettuce for a recipe, unaware that waste is decreasing profits. Substituting chopped lettuce (even at a higher per case cost) might increase your profitability.

To perform a plate analysis:

1. From the My Plates page, click the plate to analyze.
2. From the Options drop-down menu, select $ Comparison Analysis. The Plate Analysis screen displays (read-only mode in left column and editable copy of existing plate in right column; see next page).
performing a plate analysis

3. Click Add Ingredient or Add Ingredient Recipe to substitute alternative products that increase profitability.

4. Modify the plate analysis according to desired specifications. For example, reduce labor and waste cost by substituting fresh produce with comparable pre-portioned and sliced products.

5. Adjust Waste, Labor, Other, and Profit to desired levels.
   
   *Note:* If you adjust the profit to a higher percentage, Menu Analysis overwrites the current price to reflect the increased margin with an adjusted price.

6. Select number of plates served and frequency to forecast plate profitability (Plates Served Day-Week-Month).

7. From the Options drop-down menu, select Print to print the plate analysis or Copy to retain a copy of the plate analysis.

8. To overwrite your current plate and product/ingredient information (left column) with the adjusted recipe (right column), click Save.
   
   *Important:* Do not click Save unless you want to overwrite your existing plate (left column) with the modified plate (right column).

9. To discard your modifications, click Cancel. The Plate details screen displays.
   
   *Note:* Reset returns the analysis and the product/ingredient information to those of the current plate (only works if analysis has not been saved).
You can update pricing on a regular basis to ensure plate costing is accurate. You can also lock pricing on products where market pricing is volatile. For example, you might want to include an average price for an item rather than the market low or high price, to ensure profitability is maintained.

Pricing does not automatically update; however, after you click the Update Pricing button, Menu Analysis changes your prices.

**Tip:** Pricing is only changed for the selected plate. Menu Analysis does not update the subplates. Also, you cannot undo pricing updates, so you should proceed with caution.

To update pricing for selected ingredients:

1. From the *Plate details* screen, select the 🔒 Price Lock checkbox for the items you do not want to change (clear if you want to update).
2. Click ✂ Update Pricing. The application retrieves all current pricing for the selected plate.

**Note:** Menu Analysis does not update pricing for locked products.

To update pricing for a plate:

1. From the *My Plates* screen, select the checkbox next to the plate to update.
2. Click Update Price. Menu Analysis retrieves all of the current pricing for the selected plate.

**Note:** Products or Ingredients that have been locked are not updated. To lock prices, go to the *Plate details* page.
copying a plate

Use the Copy Plate function to easily create plates that are similar to existing plates. For example, add onion rings to a hamburger to create a hamburger basket.

To copy a plate:
1. From the My Plates page, click a plate to copy. The Plate details screen displays.
2. From the Options drop-down menu, select Copy. The Copy Plate dialogue box displays.
3. Type a name for the new plate.
importing a plate

Use the Import Plate function to easily add already existing plate details to a new plate in Menu Analysis.

To import a plate:
1. From the Plates Summary page, click Import Plate. The file finder window displays.
2. Click a plate file to import.
3. Click Open.
creating a plate PDF

You can easily create a plate PDF that you can download and print for easy reference.

To create a plate PDF:
1. From the My Plates page, click a plate. The Plate details screen displays.
2. From the Options drop-down menu, select Print. The Print Options window displays.
3. Select the Print Image checkbox if you want to print a copy of the plate.
4. Select the checkbox next to the options to include in the PDF.
5. Click OK. The plate PDF displays.
6. Right-click the file and select Save to save the PDF file to a desired location.
creating and editing menus

Use the Menus screen to create and edit menus.

To create and edit a menu:

1. From the Menu Analysis homepage, click Menus. The Menu Summary page displays.
2. Click Create New Menu.
3. Type a name for the new menu.
4. To add an existing plate, click Add Existing Plate, select a plate to add, and click Add.
5. To add a new plate, click Add New Plate. See Adding Plate Details to configure your new plate.
6. Click Save.
creating an order

After you create a menu, you can easily order products right from Menu Analysis. Use the Menus screen to initiate an order, and then use Order Management to review or change your order. Menu Analysis adds the list of products to an active order in Order Management where you can validate and submit them.

To create an order:

1. From the Menu Summary page, click the menu category to display the desired menus.
2. Select the checkbox next to the menu to order.
3. Click Order.
4. The application displays the confirmation screen with the order number. Note the order number and click OK.
   
   Note: Your order will remain in open status until you review and submit it.

5. Log on to Order Management to review or change the order, and then submit it.

Tip: All items in your order default to a quantity of 1 regardless of the quantity specified in the plate.
plate photos
adding and deleting plate photos

After creating a plate, you can add a photo of a plate for quick reference. You can also create a plate booklet for your kitchen staff by printing the finished plates.

To add a plate photo:
1. From the Plate details screen, click Upload Image. The file finder window displays.
2. Click a plate picture to upload.
3. Click Open. The application displays the image thumbnail.
4. Click Save to save the photo to the plate details.

To delete a plate photo, click Remove.

Note: The file format must be a JPG or GIF file. The application automatically compresses files to the required 300 kb maximum file size.
menu management

What is menu analysis?

Performing a menu analysis breaks down a recipe's total food cost by products and ingredient units of measure to help understand what is contributing to menu item profitability.

Can I place an order from the menu analysis application?

Yes. You can convert a menu into an open order. This process creates an open order in Order Management that you can edit and submit. A confirmation number displays in the Menu Analysis application.

I am not getting any costs associated with my choice of products. What should I do?

Make sure that you have indicated a quantity. The menu analysis application does not display cost without an associated quantity. Also, ensure that the volume, weight, and portion fields have values or else the application will not calculate.

What does it mean when I see a Food Cost Alert icon?

The Food Cost Alert icon indicates that your recipe has exceeded the amount that you set for your target food cost % and will result in a reduced profit.

What is the difference between a recipe analysis and a profitability analysis?

A profitability analysis shows you cost breakdowns and profit margins. A recipe analysis is a what-if scenario that allows you to substitute alternate products to reduce cost and compare recipes side by side.

Do I have to start from scratch each time I add a recipe or can I leverage other recipes and menus?

No. You can copy a recipe and modify it to meet your current needs.

system access

How do I access the menu analysis application?

You can access the menu analysis application through Sysco Market using the following path Manage My Business > Tools > Menu Analysis or from within Express Ordering under the Menu Analysis tab.

Whom do I call for help with the Menu Analysis application?

Contact your Sales Associate tor Sysco Business Services for help 1-800-SYSCO CS.
frequently asked questions

plate management

Is there a way to block the application from updating prices for certain products?

Yes, select the lock price checkbox next to the product. This selection locks the current price and does not change it during the next update.

How does the application account for product yields?

You have the ability to indicate yield amount of a product as well as add waste and labor costs to ensure an accurate analysis.

How do I scale a plate?

To scale a plate, select the scale checkbox next to the plate products and ingredients. Then, type in the desired number of servings.

What is the difference between a product and a custom ingredient?

Sysco offers products while custom ingredients are not purchased from Sysco.

When I search for a product I get too many results. How can I get a more manageable list just for the items I need?

You can use the product search filters to narrow your search results by brand, pack, size, category, storage, and stock indicator.