



Creating an Initial Milk Entry for a New Center/Site

INITIAL NOTE: IT IS IMPORTANT TO COLLECT INFORMATION FROM THE NEW SITE BEFORE THEY SERVE THEIR FIRST MEAL THAT REQUIRES MILK ON THE FIRST DAY OF THEIR TRANSITION.

- Contact the sites the afternoon before the date of transition.
- Obtain the information regarding the amount of milk currently on site (that will roll over to the new month in CenterPilot).
- It is not necessary to make the electronic entry in CenterPilot before the month starts since you may back date the initial entry and the “milk math” will correct accordingly.

CenterPilot is developed to assist centers/sites track milk daily. CenterPilot tracks:

- The amount of milk **required** for each meal to accommodate the number of planned/expected participants by age group.
- The actual amount of milk **served** according to the attendance taken at each meal.
- The amount of milk **purchased** according to the receipts entered.
- The amount of all of the above is tracked for all 3 types of milk:
 - Whole milk
 - Skim milk
 - Alternate milk

When a new site joins your sponsorship, you as the sponsor will need to assist the site by creating an initial milk entry to begin the “milk math” process that will then continue in the Milk Bank. If several sites are joining your sponsorship at once, or if you are a sponsor new to CenterPilot and are transitioning several sites, you may want to use a worksheet to collect the information from your sites and then enter it into CenterPilot. This grid serves as an example of the worksheet you may want to create (there is also one attached and online at www.centerpilot.com):

Name of Center/Site	Date of Transition to CenterPilot	Amount of Whole Milk on Site	Amount of Skim Milk on Site	Amount of Non-Dairy Milk on Site
Ex: Test Site No. 1	10/1/2019	2.5 gallons	100 half pints	1 half gallon

Once the information has been collected from the site(s), enter it into CenterPilot as a “fake” Receipt Entry.

- Log into CenterPilot as the sponsor.
- From the menu at the top, choose Receipt/Receipt Entry.
- On the top left, select the center/site.
- On the top left, select the claim month (in the example above, the claim month would be: Live Claim: October / 2019).
- Begin entering a “fake” receipt in the middle of the screen:
 - Enter the date as the first day of the month or the date of transition to CenterPilot.
 - From the drop down to select receipt type, choose Donation: Donor Name.
 - In the next cell that appears, enter “Initial Milk Entry” or “Initial Milk Carryover”.
 - Skip all other cells and click on SAVE RECEIPT.
 - When the entered receipt appears in the Receipts for This Claim grid at the bottom, click on the pencil on the left to bring the receipt back into the Enter a Receipt grid above.
 - To the left, click on + Milk Entry on the Milk Entry grid.
 - Make the entries until all milk types on site for the center are entered against this receipt. In the example above, we would enter:
 - Whole Milk – 5 half gallons (to equal 2.5 gallons)
 - Skim Milk – 100 half pints (cups) (to equal 6.25 gallons)
 - Non-Dairy Milk – 1 half gallon (to equal .5 gallons)
 - Make as many entries as required to show the correct amounts of all milk types on site
 - Click on SAVE RECEIPT to the right.
 - Notice that the milk entries are now reflected in the columns in the grid at the bottom.
- Now check the Milk Bank to view the initial entry.
 - From the menu at the top, select Meal Reports/Milk Bank
 - Notice the initial milk entries and balances showing up in the Milk Bank.

Your site(s) should now show accurate “milk math” going forward.

NOTE THAT EACH SITE WILL NEED TO PROCESS MILK MONTHLY ON THE LAST DAY OF THE MONTH (OR AFTER) TO CARRY OVER MILK EACH MONTH.

To create a Carry Over amount for each month:

- Choose the previous month in the upper left corner.
- In the Milk Served for the Period grid, click on Process Milk.
- The milk balances from the last day of this month will transfer to the first entry in the same section of the current month.