CRUNCHTIME! ENTERPRISE MANAGER

Change the Inventory Unit

How To Guide

Document Details

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System Requirements

- CES Version 08.20.00 or higher

Related User Group Permissions

Screen Name	Control Name	Description
Bid Sheet - Vendor Bids	Add/Delete/Save	Enter and save vendor bids for each vendor and market.
Company Product Details	Add/Delete/Save	Access the Company Products summary & detail screens.
Company Products List	Assign Storages	Access the Assign Storages check boxes and button.
Company Product Setup - Inventory Units	Add/Delete/Save	Add/Remove alternate count units for a product.
NC-Daily Store Tasks	Inventory Adjustment	Create and save inventory adjustments.
Recipe	Save	Save changes to recipe records.
Recipe Summary	View	Access the Recipe summary screen.

Be sure to grab the latest version of this document here:

https://links.crunchtime.com/EMHT-ChangeTheInventoryUnit

OR by scanning the QR code to the left.

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Change the Inventory Unit

Process Overview

Introduction

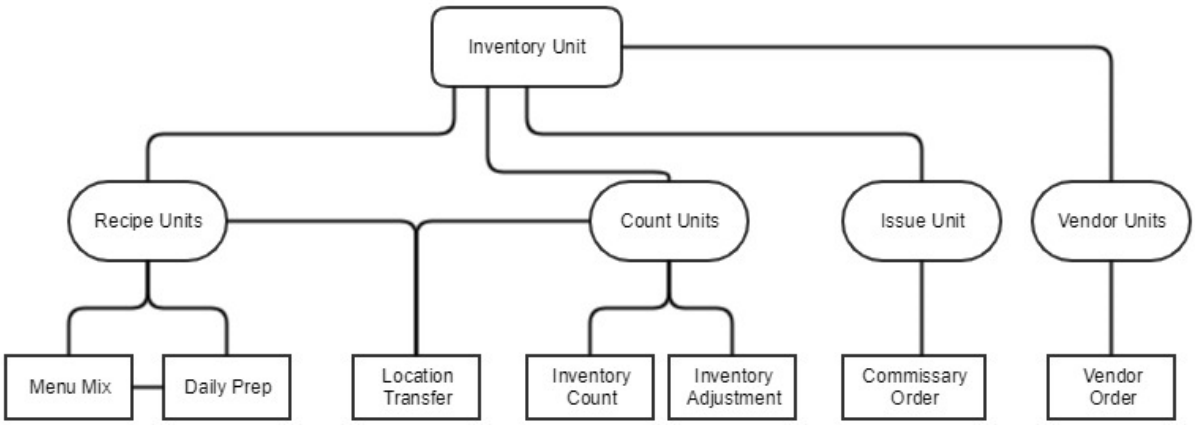
This document outlines the process for changing a Product's inventory unit (not just the label) as well as other configurations that relate back to this unit.

Warning: Changing a product's Inventory Unit is **not** recommended by CrunchTime, but we do understand that business needs may arise in which this task is necessary.

This should be done only after all Locations have posted the most recent period.

What is the impact of changing the Inventory Unit?

The Inventory Unit is the Global Reporting unit for Products. In Recipes, the Portion Unit acts as the Global Reporting unit. All transactions, costs, and other units convert back to the Inventory Unit. The diagram below demonstrates the connection from how a product is used in Recipes, Counting Units, and Internal and External Purchasing. If the Inventory Unit (or Portion Unit for a Recipe) is changed after transactions occur, this can affect multiple areas of the application.



	Company Product Formula	**Example:** Milk (Inventory Unit = GAL)
Issue Unit	"How many of this Issue Unit are in 1 Inventory Unit"	[Issue Unit = GAL] Conversion = 1
Recipe Units	"How many of this Recipe Unit are in 1 Inventory Unit"	[Recipe Unit 1 = OZ] Conversion = 128
Alt. Count Units	"How many of this Count Unit are in 1 Inventory Unit"	[Alt. Count = 4 GAL CASE] Conversion = 0.25
Vendor Units	"How many Inventory Units are in 1 Vendor Unit"	[Vendor Unit = 4 GAL CASE] Conversion = 4

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Change the Inventory Unit

Process Overview (Continued)

What is the impact of changing the Portion Unit?

Recipes are built based on how much is made (1 x Batch Unit) or sold (1 x Portion Unit)at a time. The Portion Unit becomes the global reporting unit for the finished prepped recipe going in to inventory – ask yourself, when you prep this recipe, how do you store it in inventory? The conversions from Portion Unit, Recipe Units, and Issue Unit all convert back to the Batch Unit. When assigning Alternate Count Units to a prep recipe to count it in multiple forms other than the Portion Unit, the Alternate Count Unit is based on 1 Portion Unit since that is the global reporting unit for the Recipe.

	Recipe Formula	**Example:** Soup (1 GAL BATCH)
Portion Unit	"How many of this Portion Unit are in 1 Batch"	[Portion Unit = QT] Conversion = 4
Issue Unit	"How many of this Issue Unit are in 1 Batch"	[Issue Unit = GAL] Conversion = 1
Recipe Unit	"How many of this Recipe Unit are in 1 Batch"	[Recipe Unit 1 = OZ] Conversion = 128
Alt. Count Units	"How many of the Count Unit are in 1 Portion Unit"	[Alt. Count = OZ] Conversion = 32

Getting Started

To avoid improper amounts being reported by the application, be sure to do the following prior to changing a product's Inventory Unit. After all Locations have posted the most recent period, be sure to note the quantity of the product in inventory at each Location.

Process Overview

1. Change the Company Product's Inventory Unit, along with the Conversions for its Issue and Recipe Units.
2. Remove/Update any existing Alternate Count Units associated with the old Inventory Unit.
3. For all Vendor Bids, verify/update the Conversion from the new Inventory Unit to the Vendor Unit.
4. For each location, manually update the Location Product's Issue Cost and Inventory Cost to reflect the cost per the new Inventory Unit.
5. At each location, perform an Inventory Adjustment to correct the On Hand quantity of the product.

Warning: Until after the changes are complete, store users **must not perform any transactions with the product** (Vendor Orders, Commissary/Customer Orders, Transfers, Adjustments, etc) or import/enter POS data into CT. There will be a one-time quantity variance for the product, but this variance will be resolved after posting the next period.

Note: If you are well acquainted with the screens noted in Steps 1-5 above, you can stop here – the remaining pages provide detailed examples showing how to complete this process.

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Change the Inventory Unit

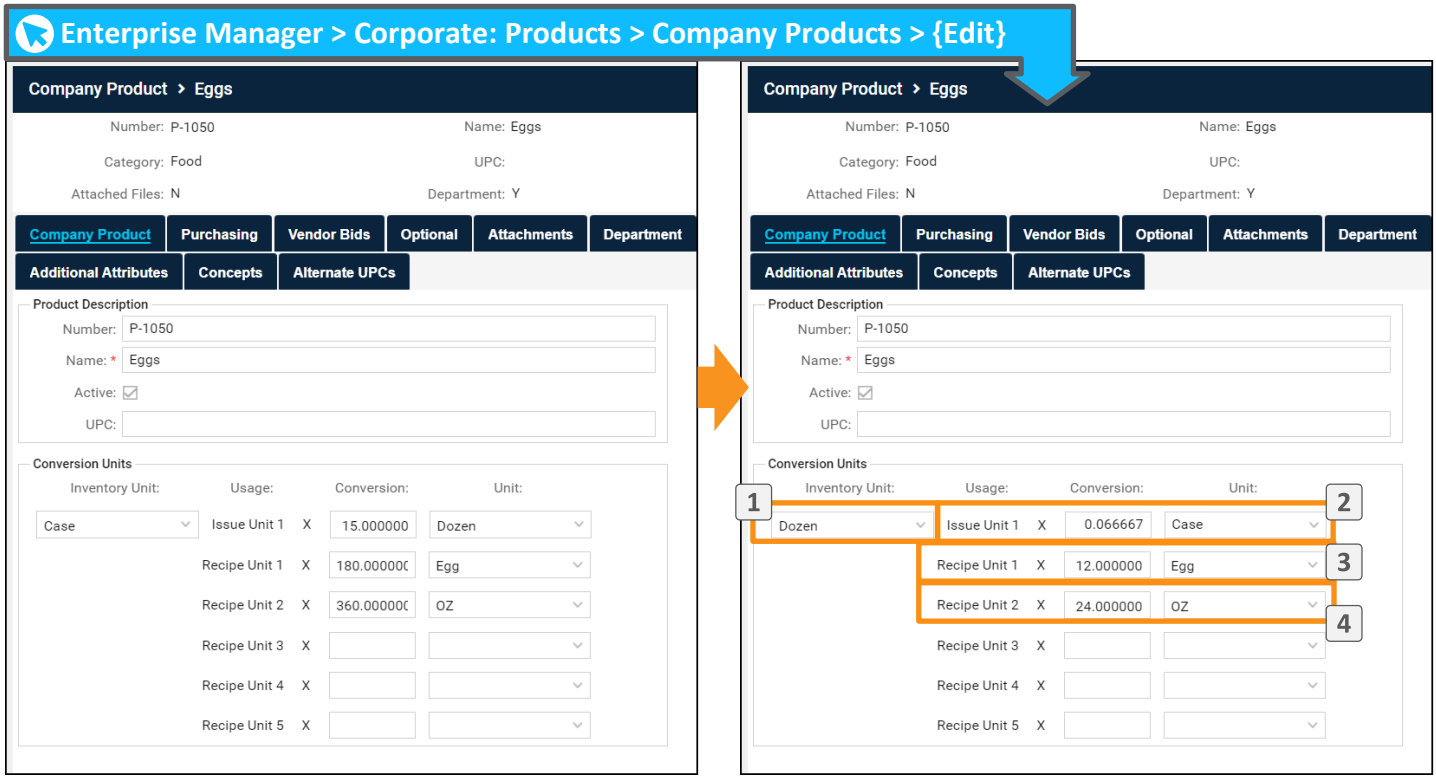
Process Details

Updating a Company Product

This section provides a detailed example of how to change a Product's inventory unit and other configurations that relate back to this unit. In the following examples, we will be changing the Inventory Unit for Large Eggs from CASE to DOZEN.

Step 1 – Change the Company Product's Inventory Unit, along with the Conversions for its Issue and Recipe Units.

The Inventory Unit is a generic label used in the application but it is the most important setting for a Product because every other pack type is linked back to it using Conversions. When the Inventory Unit is changed after transactions have been reconciled, the label is updated in finalized transactions as well. However, even though the label changes, the quantity/value does not. If the Inventory Unit is changed, the conversions to the Recipe Units, Issue Units, and Alternate Count Units will all need to be updated.



Related User Group Permission ▶ Company Product Details: Add/Delete/Save

1. Change the *Inventory Unit* from **Case** to **Dozen**.
2. Change the *Issue Unit 1* from **Dozen** to **Case**. The new *Conversion* is calculated as "How Many Cases in 1 Dozen?" Since there were 15 Dozen in 1 Case, the equation gets flipped to 1 Case = 1/15 of 1 Dozen, which = **0.066667**.
3. The new *Conversion* for *Recipe Unit 1* is calculated as "How Many Eggs in 1 Dozen?", which is **12**.
4. The new *Conversion* for *Recipe Unit 2* is calculated as "How Many Ounces in 1 Dozen?" Since there are 180 Eggs and 360 OZ in 1 Case, each Egg is 2 OZ so there are **24** OZ in 1 Dozen.

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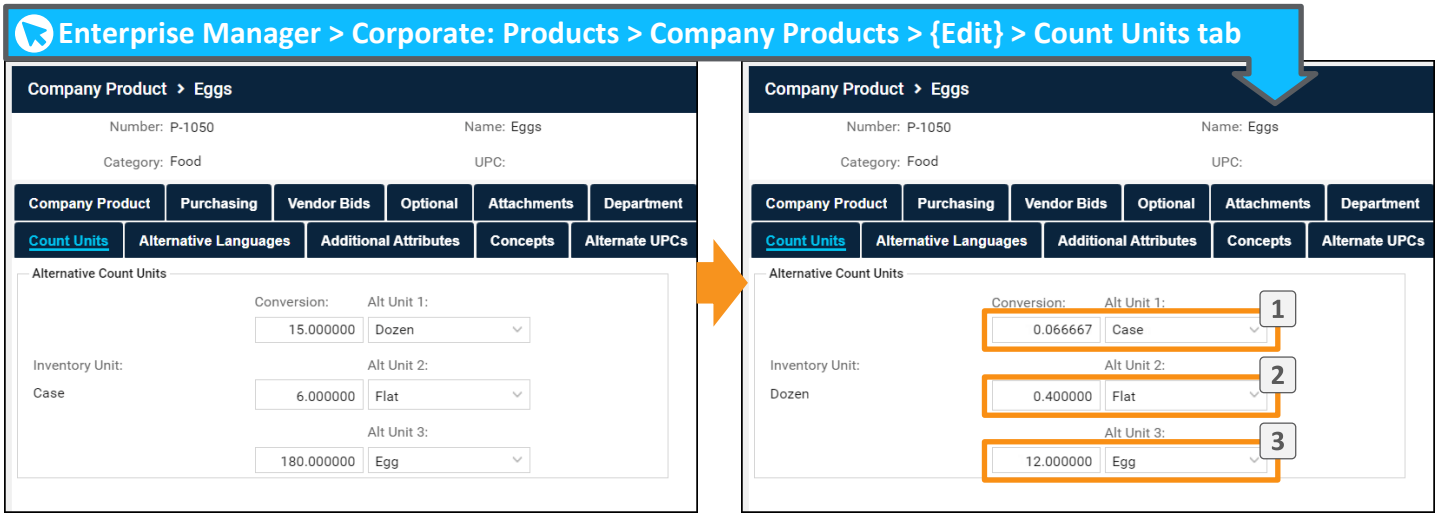
Change the Inventory Unit

Process Details (Continued)

Step 2 – Remove or Update any existing Alternate Count Units associated with the old Inventory Unit.

Alternate Count Units are set up the same way however often times the Alternate Count Unit is based on a larger unit than the Inventory Unit. In this case, you still would ask the question: "How many Alternate Count Units are in 1 Inventory Unit" but if the Alternate Count Unit is larger, the conversion will be a fraction of the Inventory Unit.



Related User Group Permission ▷ Company Product Setup - Inventory Units: Add/Delete/Save

1. Change the *Alt Unit 1* from **Dozen** to **Case**. The new *Conversion* is calculated as "How Many Cases in 1 Dozen?" Since there were 15 Dozen in 1 Case, the equation gets flipped to 1 Case = 1/15 of 1 Dozen, which = **0.066667**.
2. The new *Conversion* for *Alt Unit 2* is calculated as "How Many Flats in 1 Dozen?" Since there are 180 Eggs and 6 Flats in 1 Case, each Flat holds 30 Eggs. There are 2.5 Dozen Eggs on 1 Flat, so the new Conversion is calculated as 1 Flat = 1 / 2.5 Dozen, which = **.40**.
3. The new *Conversion* for *Alt Unit 3* is calculated as "How Many Eggs in 1 Dozen?", which is **12**.

Tip: This can be done at the Company Product level if the Units and Conversions are the same at all Locations. If not, then this must be done at the Location Product level for Location with different Units and/or Conversions.

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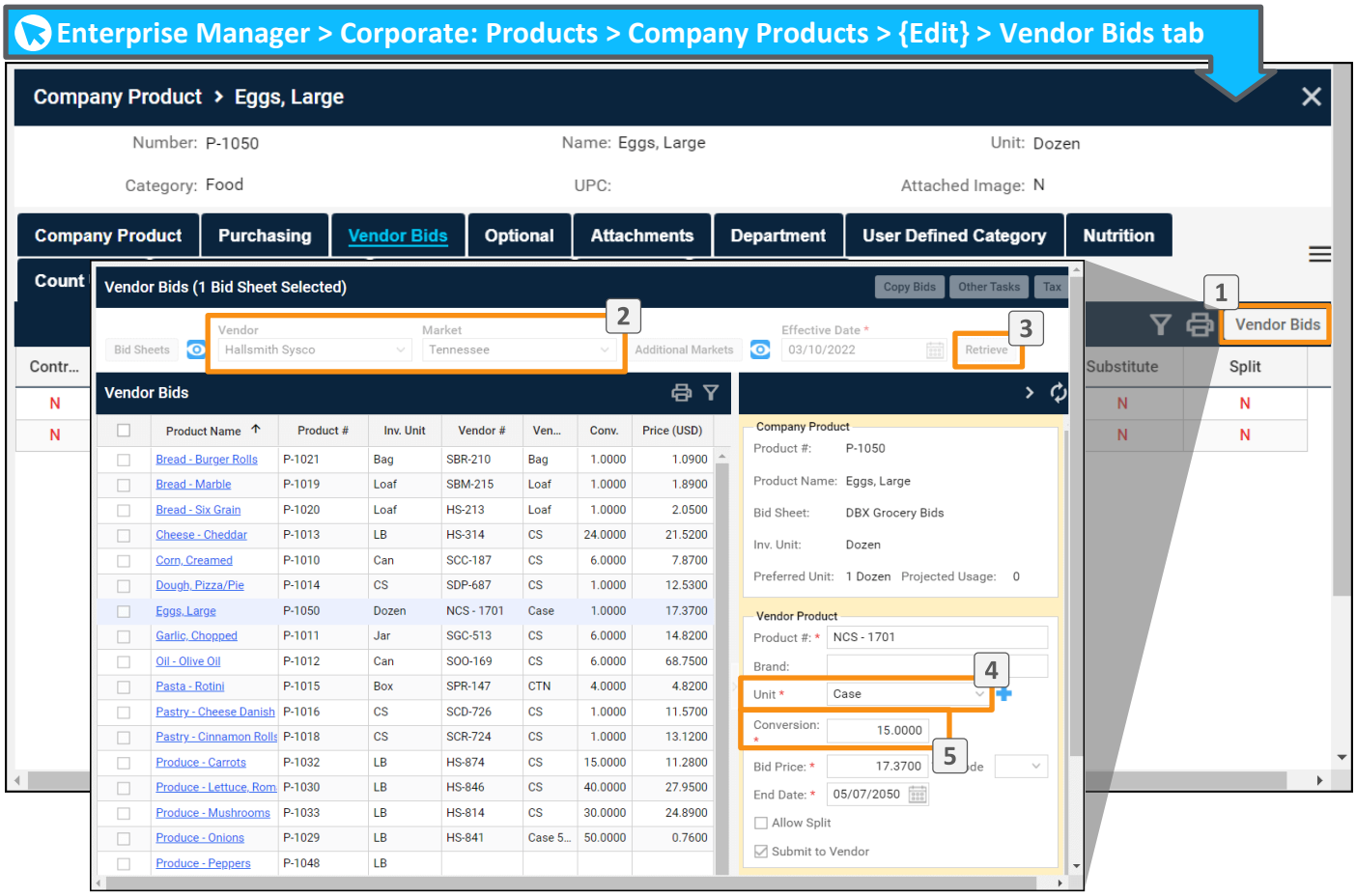
Change the Inventory Unit

Process Details (Continued)

Step 3 – For all Vendor Bids, verify/update the Conversion from the new Inventory Unit to the Vendor Unit.

Vendor Units also relate back to the Inventory Unit. Vendor Unit *Conversions* are configured differently than Recipe, Issue, and Alternate Count Units. When configuring Vendor Unit Conversions, you should ask yourself "How Many Inventory Units are in 1 Vendor Unit?"



Related User Group Permission ▷ Bid Sheet - Vendor Bids: Add/Delete/Save

1. Click the *Vendor Bids* button.
2. Select the Vendor and Market.
3. Click *Retrieve*.
4. For this product, the *Vendor Unit* is still **Case**.
   (*This won't necessarily change when you change the Inventorty Unit*.)
5. The new *Conversion* is calculated as "How Many Dozen are in 1 Case?", which is **15**.
6. Repeat steps 2-5 for each bid.

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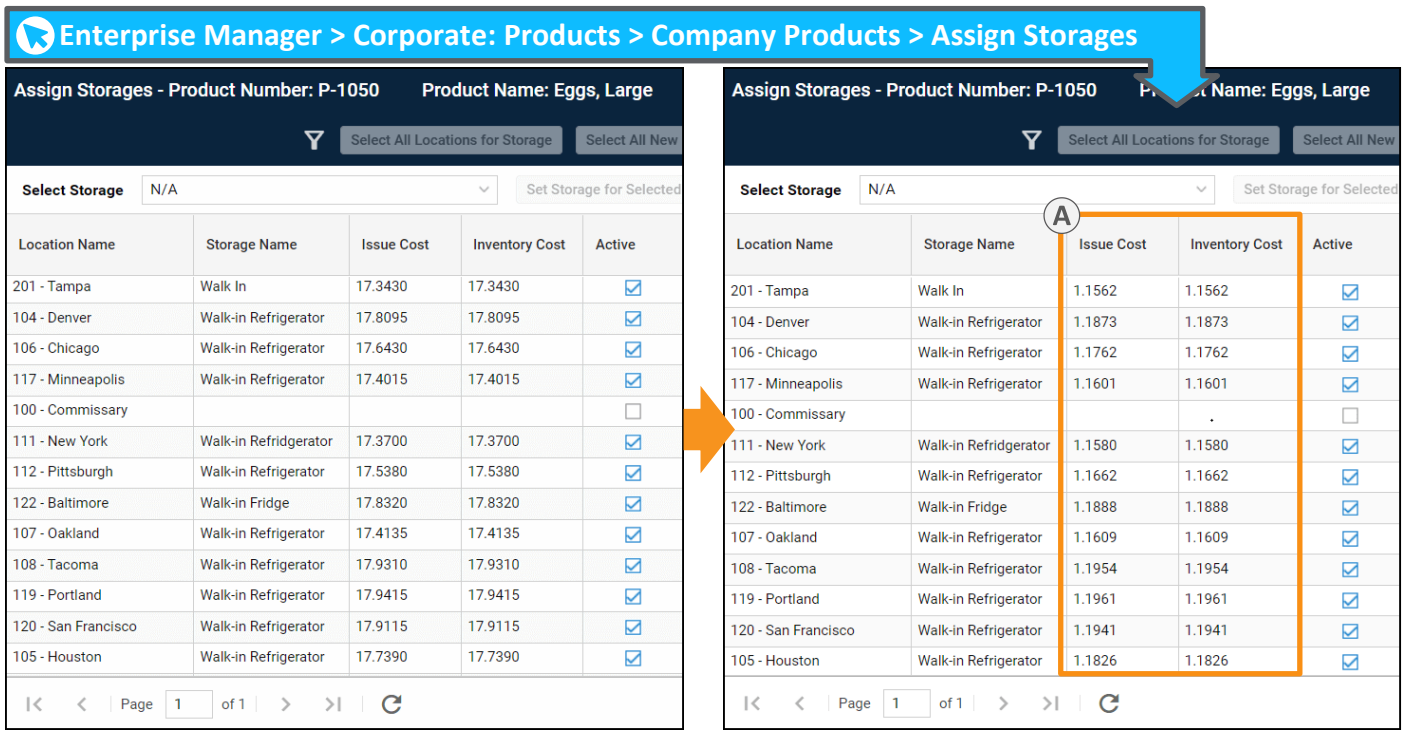
Change the Inventory Unit

Process Details (Continued)

Step 4 – For each location, manually update the Location Product's Issue Cost and Inventory Cost to reflect the cost per the new Inventory Unit.

Product Costs will also be affected by this change. The value of a Product at a Location is assigned either manually, by reconciling invoices, or by finalizing prep. If the Inventory Unit is changed, the product is still valued at the cost of the old unit until an invoice is reconciled or someone manually updates the Location Product *Issue Cost* and *Inventory Cost*. If the Product Cost is not updated, the Inventory Value for the product will be incorrect, Recipe Costs will be incorrect when sold, and Prep Recipes will be valued incorrectly when prepped.



Related User Group Permission ▷ Company Products List: Assign Storages

Ⓐ Calculate the new product value and enter it in the *Issue Cost* and *Inventory Cost* fields. This is done by dividing the the current cost by the conversion factor between the old Inventory Unit and the new one. Since there were 15 Dozen Eggs in 1 Case, each current cost must be divided by 15 to calculate the new cost.

For example: In Tampa, the new Issue & Inventory Cost is calculated as [17.343 ÷ 15] = **1.1562**

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CRUNCHTIME! NET-CHEF

Change the Inventory Unit

Process Details (Continued)

Step 5 – At each location, perform an Inventory Adjustment to correct the On Hand quantity of the product.

The On Hand quantity at each location must be updated to reflect this change. You must adjust in or out an appropriate quantity in the new Inventory Unit so that you end up with the correct On Hand quantity in that unit.

Net-Chef > Inventory: Create Inventory Adjustment

Inventory Adjustment

Date: 03/10/2022 Daypart: N/A Retrieve Save Add Selected Products

Memo:

	Product ...	Product Name	On Hand	Adjustment Qu...	Unit	Unit Cost	Storage Location	Qualitative Judgment
								N/A
	P-1014	Dough, Pizza/Pie	3.80		CS	17.9900	Walk In	N/A
A	P-1050	Eggs, Large	10.00	-140.00	Dozen	1.1562	Walk In	Inventory Correction
	P-1011	Garlic, Chopped	19.58		Jar	3.4900	Deli Cooler	N/A
	P-1005	Juice - Fruit Punch	41.00		EA	0.8271	Beverage Cooler	N/A
	P-1006	Juice - Iced Tea	40.00		EA	0.8500	Beverage Cooler	N/A
	P-1007	Juice - Lemonade	25.00		EA	0.8438	Beverage Cooler	N/A
	P-1024	Meat - Beef Tips	70.00		LB	2.6900	Prep Kitchen Cooler	N/A
	P-1026	Meat - Burger Patties	50.00		LB	2.5900	Grill Cooler	N/A
	P-1023	Meat - Ground Beef	50.00		LB	1.9900	Prep Kitchen Cooler	N/A
	P-1022	Meat - Pepperoni, Sli...	84.17		LB	1.7900	Prep Kitchen Cooler	N/A
	P-1012	Oil - Olive Oil	22.77		Can	15.9900	Deli Cabinet	N/A
	P-1015	Pasta - Rotini	20.00		Box	1.6900	Storeroom	N/A
	R-1009	Pasta Salad	10.00		LB	1.7740	Deli Cooler	N/A
	P-1016	Pastry - Cheese Dani...	20.00		CS	16.9900	Walk In	N/A

Related User Group Permission ▷ NC-Daily Store Tasks: Inventory Adjustment

Ⓐ If you had 10 Cases in your inventory, it now looks as though you have 10 Dozen. Since there were 15 Dozen Eggs in 1 Case, you would actually have 150 Dozen Eggs in inventory. Therefore, you need to create an Inventory Adjustment for **-140 Dozen** to increase your inventory to 150 Dozen.

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Change the Inventory Unit

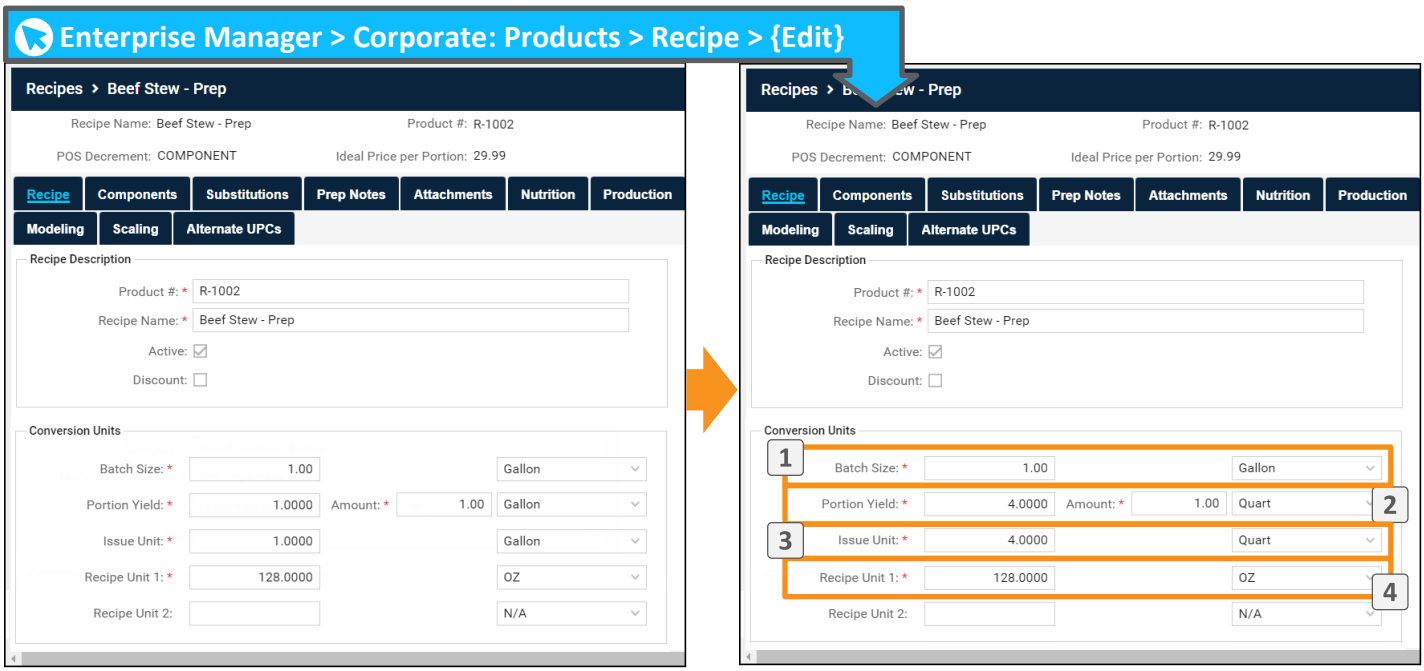
Process Details (Continued)

Updating a Recipe

This section provides a detailed example of how to change a Recipe's Portion unit and other configurations that relate back to this unit. In the following example, we will be changing the Portion Unit for Beef Stew Prep from **Gallon** to **Quart**.

Change the Recipe's Portion Unit, along with the Conversions for its Issue and Recipe Units.

0Just like with Products, Recipes use conversions back to a primary inventory unit known as the Portion Unit. Recipes are configured based on their Batch Size and Unit (how much of the Recipe is made or sold at one time), but it is the Portion Unit that the Recipe is valued by. The Portion, Recipe, and Issue Units all have conversions back to the Batch Unit.



Related User Group Permissions ▷ Recipe: Save and Recipe Summary: View

1. The Batch Size does not need to change, so this will remain 1 Gallon.
2. Change the *Portion Yield, Amount* & *Unit* from **1 1-Gallon** portion to **4 1-Quart** portions.
3. Change the *Issue Unit* from **Gallon** to **Quart**. (*If you're portioning by the Quart, then you're likely issuing that package type on your Commissary/Customer Orders as well.*)
   The new *Conversion* is calculated as "How Many Quarts in a 1 Gallon Batch?", which is **4**.
4. The *Conversion* for *Recipe Unit 1* does not need to change, so this will remain **128** (OZ in the Batch).

Reminder: For Prep Recipes, be sure to update the Recipe's Alt Count Units, Issue and Inventory Costs, Vendor Bids (if any), and perform an Inventory Adjustment to update the On Hand quantity to reflect the new Portion (Inventory) Unit.

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