Year-End Calendar Checklist

Job Aid

Document Details

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Overview

This document provides a checklist of all required and optional calendar setup that should be completed before the start of the 2027 calendar year.

Download the latest version of this document here:
https://links.crunchtime.com/EMJA-EndOfYearChecklist

… or scan the QR code to the left.

User Group Permissions

Screen Name	Control Name	Description
Financial Calendar	Add/Delete/Copy/Save	Allows users to add periods/dates to the Financial, Post, Reporting, Scheduled Closed, Promotions, or Holiday calendars; copy or delete periods; save changes to the calendars
Financial Calendar	Calendar Wizard	Enablers this button, which opens the wizard for guiding users through setting up the Global (Financial & Reporting) and Location Post Calendars.
Financial Calendar	View	Access the screen in view-only mode.
NC-Administrative Options	Budget Setup	Enables the “View/Edit Budget Data” option on the Administration menu.

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Required Setup

Introduction

If you haven't done so already, now is the time to do your year-end calendar setup to ensure a smooth transition into 2027.

Important: Setting up your Financial, Post, and Reporting Calendars is a critical required step, and must be done so that your users can continue to:

- Place Vendor Orders
- Enter & Post Inventories
- Create Labor Schedules & Import Time Records

It's easy to forget things you may only do once a year, so to help make this easier we've pulled together the Year-End Checklist below. As always, please reach out to your Customer Success Manager, or Crunchtime Support, with any questions.

Review Current Calendars

Before creating calendars for next year, it is important to review a few items on your Financial, Reporting, and Post Calendars for the current fiscal year to ensure there are no gaps or discrepancies:

1. Confirm the End Date of your Fiscal Year is correct. This date should be the day immediately before the first day of your next fiscal year.
2. Review your Reporting Calendar to ensure the LAST period is **exactly** 7 days and ends on your Week Ending Day. Reporting Calendar periods must be exactly 7 days long to enable Labor and Sales Forecasting functionality.

Alert: What if the last period in your Reporting Calendar isn't exactly 7 days?

- If the period is **less** than 7 days, delete it. Those extra days will automatically go into the first period of the next year. It's OK if the last period ends a little bit before the end of the fiscal year.
- If the period is **more** than 7 days, delete it *and* recreate as many 7-day periods as necessary to get to the end of the year. Do not include any periods that are less than 7 days.

3. Confirm all Post Calendars extend through the entire fiscal year. Use the *Post Calendar Missing* task on the "Today's Corporate Tasks" dashboard widget to identify any locations that need additional Post Periods to complete the current fiscal year.

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Year-End Calendar Checklist

Required Setup (Continued)

Create Essential Calendars

The next step is to create the Financial, Reporting, and Post Calendars for the upcoming year. These calendars must be setup before the beginning of your new fiscal year.

Tip: We recommend using the Calendar Wizard to make completing this step faster, easier, and more accurate. Here's how: https://links.crunchtime.com/EMSG-TheCalendarWizard
When you're finished, continue working through this checklist at the top of page 4.

Financial Calendar:

1. In Enterprise Manager, go to *Corporate > Financial Calendar*.
2. Set the Fiscal year drop-down to 2027.
3. Add periods for all financial periods in 2027.

Reporting Calendar:

On the same Financial Calendar screen as above…

1. Select the *Reporting* tab and verify the Fiscal Year is set to 2027.
2. Click or tap the Add (+) icon and add your first period. (The date you choose should fall on the same day as your Company's Week Ending Day).
3. Select the *Increment* icon and select the desired increment period *(Note: We strongly recommend choosing the 'Weekly' option)*.
4. Match up the 2027 period numbers to the 2026 period numbers to have accurate year-over-year reporting.

Post Calendar:

On the same Financial Calendar screen as above…

1. Select the *Post* tab and verify the Fiscal Year is set to 2027.
2. Choose the appropriate Location from the drop-down menu.
3. Click or tap the *Add* (+) icon and enter the first Post Period end date. (The date you choose should fall on the same day as your Company's Week Ending Day).
4. Select the *Increment* icon and choose the desired increment period. The system will generate the rest of the post calendar for this Location. The last post date should match the fiscal year end date. *(Note: We strongly recommend choosing the 'Weekly' option)*.
5. Choose the *Copy* icon to copy this Post Calendar to other Locations.

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Year-End Calendar Checklist

Required Setup (Continued)

Resume Setup Here: If you used the Calendar Wizard to create your Financial, Reporting, and Post Calendars, start here to complete the rest of the Year-End Checklist.

Budgets (in Net-Chef)

This is recommended if you base your Cost of Goods % on anything other than Total Net Sales.

1. Login to Net-Chef for each Location.
2. From the Administration menu, select *View/Edit Budget Data*.
3. Select the first period of the 2027 Fiscal Year.
4. Choose *Retrieve* and enter the *Budget Type* ($ or %) and *Value* for all desired fields.
5. Use *Apply Budget* to copy this budget over to multiple periods for this Location.

Tip: You can also import Budgets using the Crunchtime Data Pump (CDP). Check out the Standard Interface Guide for more information: https://links.crunchtime.com/LatestStandardInterfaceGuide

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Optional Setup

Holiday Calendar

On the Financial Calendar screen:

1. Select the *Holiday* tab and verify the Fiscal Year is set to 2027.
2. Select the appropriate Location.
3. Click or tap the *Add* (+) icon to enter dates and holiday names.

Promotions Calendar

On the Financial Calendar screen:

1. Select the *Promotions* tab and verify the Fiscal Year is set to 2027.
2. Select the appropriate Locaiton.
3. Click or tap the *Add* (+) icon to enter begin and end dates for each promotion, along with the name of the promotion.

Scheduled Close Calendar

On the same Financial Calendar screen:

1. Select the *Scheduled Closed* tab and verify the Fiscal Year is set to 2027.
2. Select the appropriate Location.
3. Click or tap the *Add* (+) icon to add dates the Location is scheduled to be closed.

Location Inventory Schedule (for mid-week or critical item counts)

To schedule Physical Inventories for completion in Net-Chef, go to *Corporate > Location Inventory Schedule*:

1. Click or tap *Add*.
2. On the *Products* tab, choose an *Inventory Type*.
3. On the *Locations* tab, select the Locations.
4. On the *Dates* tab, set up the inventory schedule for the upcoming year.

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