Create Cycle Inventory Counts

Quick Start Guide

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Overview

Looking to count a limited set of products each week? Cycle Counts modify your count sheet to include only key products on the weekly Final for Post Inventory. Don't forget, Cycle Counts also allow you to perform a full inventory count, including products like paper supplies or chemicals on a monthly or as needed basis.

System Requirements

- Be sure to grab the latest version of this document here: https://links.crunchtime.com/EMQS-CreateCycleCounts

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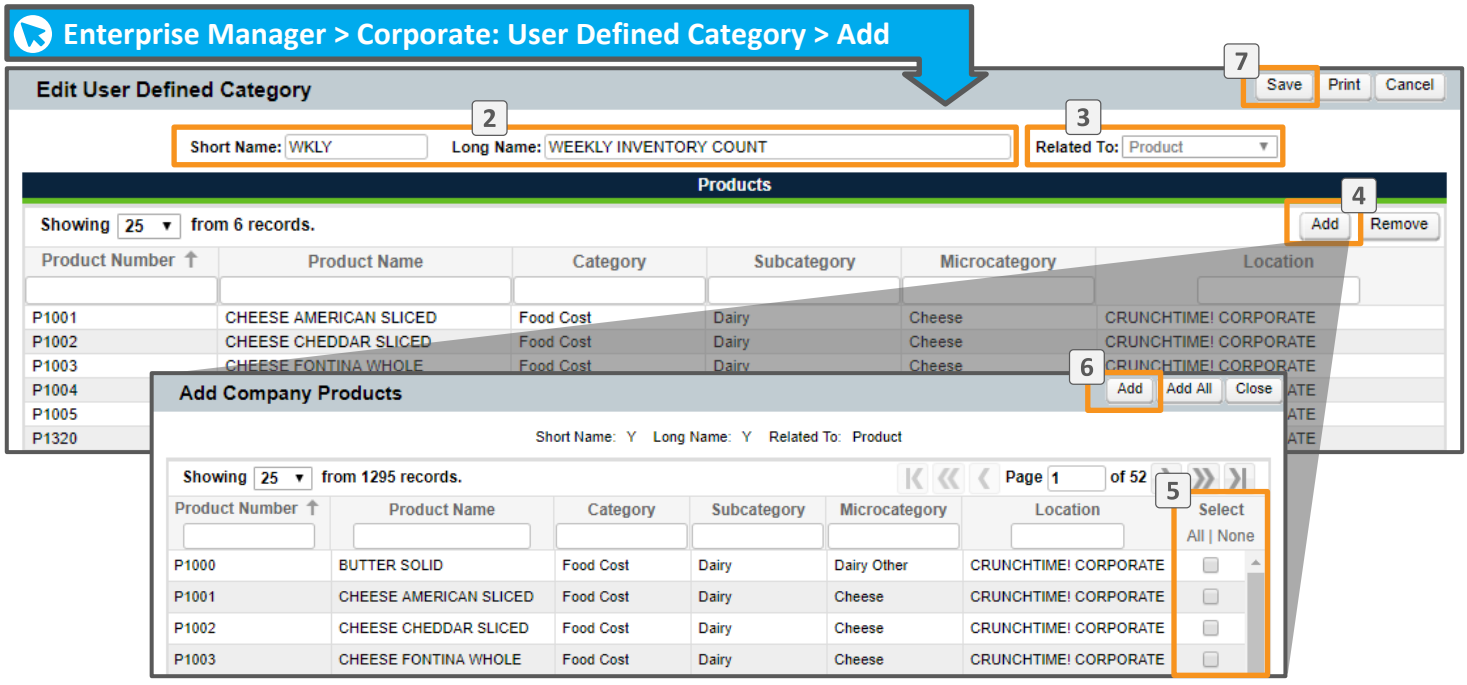
Create Cycle Counts

Where do I start?

As designed, the application includes every Location Product on a Count Sheet. Using Cycle Counts allows you to replace your full inventory at Final for Post with a smaller list of products that excludes those you typically count less often (like paper supplies and chemicals).

Create User Defined Categories

The first step is to define the key list of Products that **will** be counted weekly.



1. From the Corporate menu, select *User Defined Category,* then click *Add*.
2. Enter a *Short Name* and *Long Name*. The Long Name will be used later when scheduling inventory, so name your User Defined Category (UDC) something meaningful.
3. From the *Related To* drop-down, choose 'Product'.
4. Click *Add* to open a pop-up window listing all Company Products.
5. Check box in the *Select* column to add the Products you wish to count weekly. If necessary, Filter by Category (or other column) to locate all the Products you need.
6. Click *Add* to associate the Products with the UDC.
7. Don't forget to *Save*!

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Create Cycle Counts

(Continued)

Create the Inventory Cycle

Here's the question: Which weeks do I count the **important things** and which weeks do I count **everything**?

Enterprise Manager > Corporate: Financial Calendar > Post > Select Location

Financial | Post | Reporting | Scheduled Closed | Promotions | Holiday | Excluded Consumption

Previous Fiscal Year

Begin Date	Date	Weekday	Inventory Type	# of Days	Status	Posted Date	Actions
01/01/2019	01/02/2019	Wednesday	WEEKLY INVENTO... (A)	2	Not Posted		Delete
01/03/2019	01/09/2019	Wednesday	WEEKLY INVENTO...	7	Not Posted		
01/10/2019	01/16/2019	Wednesday	WEEKLY INVENTO...	7	Not Posted		Delete
01/17/2019	01/23/2019	Wednesday	WEEKLY INVENTO...	7	Not Posted		Delete
01/24/2019	01/30/2019	Wednesday	(B)	7	Not Posted		Delete
01/31/2019	02/06/2019	Wednesday	WEEKLY INVENTO...	7	Not Posted		Delete
02/07/2019	02/13/2019	Wednesday	WEEKLY INVENTO...	7	Not Posted		Delete
02/14/2019	02/20/2019	Wednesday	WEEKLY INVENTO...	7	Not Posted		Delete
02/21/2019	02/27/2019	Wednesday		7	Not Posted		Delete

(A) **Cycle Inventory period** (Count the important things): Apply the UDC you created as the *Inventory Type* for all weeks that you will count a limited group of Products.

(B) **Full Inventory period** (Count everything): Leave the *Inventory Type* blank for all weeks that you will perform a full inventory count of all Products.

Tip: The Inventory Type can be copied to using the Location Copy feature:
EM > Corporate: Locations > Copy icon > (Choose your Source & Destination Locations) > Post Calendar Inventory Type (updates only)

Define Closing Methods

So what happens to the products I'm not counting?

Enterprise Manager > Corporate: Products > Storage Locations > Select Location

			Primary Closing Method				Secondary Closing Method (C)			
Code	Storage Name	Prep Station	Stock	Non-Stock	Sales	Intermediary	Stock	Non-Stock	Sales	Intermediary
			All	All	All	All	All	All	All	All
UNASGN	Unassigned		Zero	Zero	Zero	Zero	Book	Book	Book	Book
0006	BAR	BAR PREP	Zero	Zero	Zero	Zero	Book	Book	Book	Book
0013	BAR ISLAND		Zero	Zero	Zero	Zero	Book	Book	Book	Book
0014	BAR JUICE COOLER		Zero	Zero	Zero	Zero	Book	Book	Book	Book

(C) Set your **Secondary Closing Methods** to 'Book' – This will ensure that even when Products like paper supplies are not present on the Count Sheet, the Book Quantity will carry over from week to week.

Setup is complete! Continue to the next page to learn what the Application User now sees in Net-Chef.

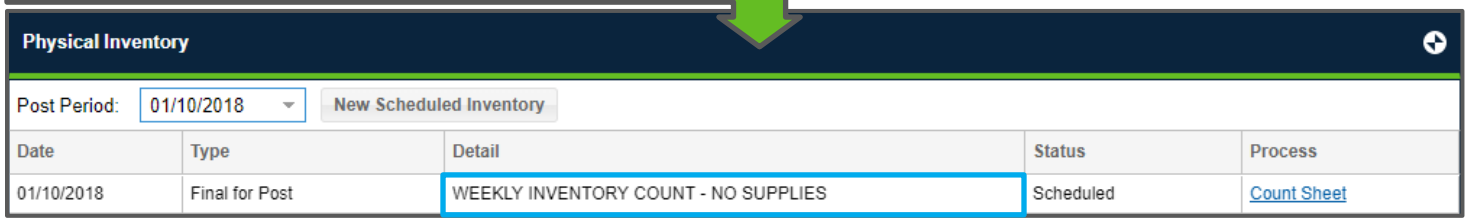
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Perform Cycle Counts

Performing Cycle Inventory Counts in Net-Chef

1. The General Manager will print the *Count Sheet* or open the Counter App for the Final for Post inventory. The Count Sheet will only display the items associated with the UDC assigned to the Post Period.

Net-Chef > Inventory: Create/Review Inventories



Tip: The "Detail" section of the *Physical Inventory* screen (outlined above) displays the Long Name of the UDC that was created on Page 2 of this document. This is how General Managers know that they are counting a limited group of Products.

If the "Detail" section is blank, the GMs will be performing a full inventory count of all products.

2. Products will be physically counted.
3. Inventory counts will be entered for all of the products counted.
4. "By Exception" will be used to populate count fields left blank.
    - These products will update using the Primary Closing Methods.
    - Any products **not** listed on the Count Sheet will update using the Secondary Closing Methods.

Note: If a UDC Inventory Type is not defined in the Post Calendar, a full inventory is expected and all counts populated "By Exception" will use the Primary Closing Methods.

5. The General Manager will review the physical counts and troubleshoot any exceptional variances.
6. The period will be posted.

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