

Post Multiple Periods

Quick Start Guide

Document Details

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Overview

This guide shows you how to post multiple inventory and/or labor periods (aka “bulk post up”) for one or more locations, with just a few clicks. This reduces the setup time needed for new locations and allows managers to start recording inventory/labor in the correct period right away.



Download the latest version of this document here:

<https://links.crunchtime.com/EMQS-PostMultiplePeriods>

... or scan the QR code to the left.

Related User Group Permissions

Screen Name	Control Name	Description
Financial Calendar	Post Up	Enables this button/menu option, which opens the wizard for guiding users through posting inventory and/or labor for one or more locations up to a selected date.

Post Multiple Periods

Overview

Say you have a new location that opened midway through the year. They're ready to enter inventory and labor this week, but Net-Chef is prompting them to start from the very beginning of the year. You could go into Net-Chef and manually post each open period until you get to the current week – but that could take hours! Instead, a system admin can use the "Post Up" feature in Enterprise Manager to quickly post all these open periods for one or more locations. The best part? It only takes a few clicks.

Use Case(s)

This feature will be most useful in situations where a location has several consecutive open periods, such as:

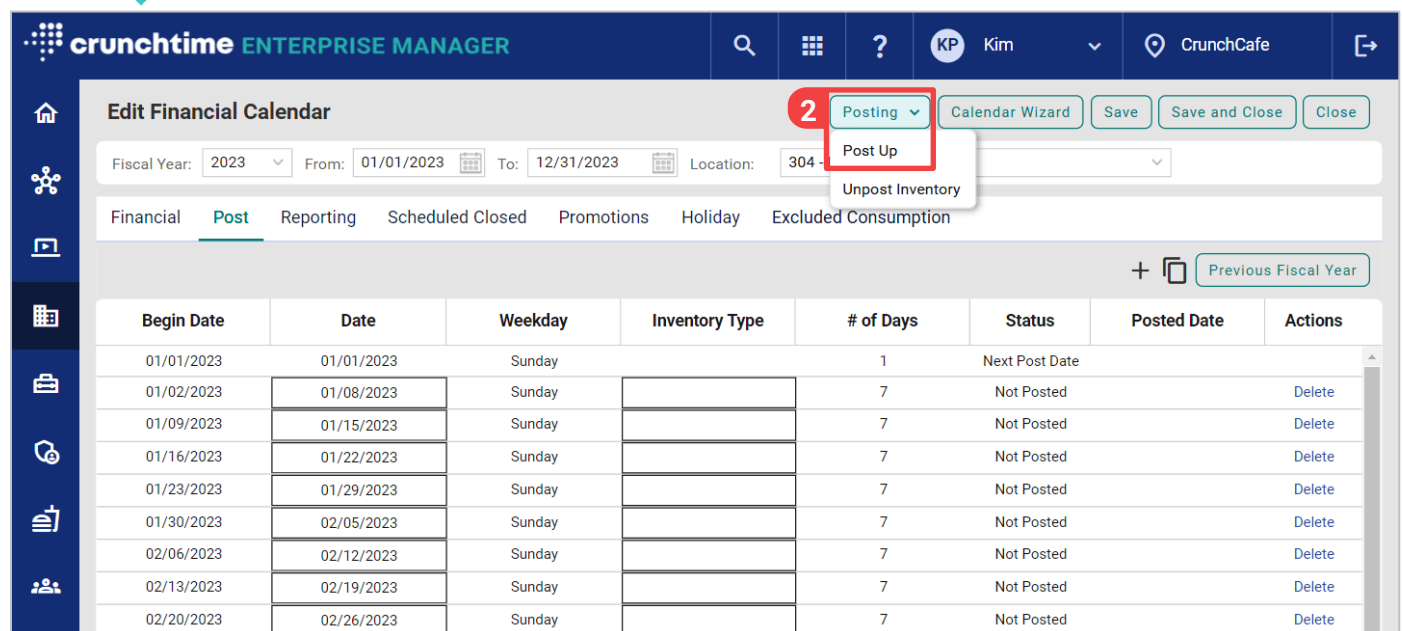
- A Post Calendar is created for a full year for a new location, even if it opens part way through the year.
- An existing location closes for an extended period and then reopens.



Note: This feature will maintain the list of active Location Products by ignoring the "Deactivate Products After ___ Post Periods" preference, ensuring no products are deactivated during Post Up.

Using the Screen

Enterprise Manager > Corporate: Financial Calendar



Edit Financial Calendar

Fiscal Year: 2023 From: 01/01/2023 To: 12/31/2023 Location: 304

Posting (selected) | Calendar Wizard | Save | Save and Close | Close

Post Up (selected) | Unpost Inventory

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

+ Previous Fiscal Year

Begin Date	Date	Weekday	Inventory Type	# of Days	Status	Posted Date	Actions
01/01/2023	01/01/2023	Sunday		1	Next Post Date		
01/02/2023	01/08/2023	Sunday		7	Not Posted		Delete
01/09/2023	01/15/2023	Sunday		7	Not Posted		Delete
01/16/2023	01/22/2023	Sunday		7	Not Posted		Delete
01/23/2023	01/29/2023	Sunday		7	Not Posted		Delete
01/30/2023	02/05/2023	Sunday		7	Not Posted		Delete
02/06/2023	02/12/2023	Sunday		7	Not Posted		Delete
02/13/2023	02/19/2023	Sunday		7	Not Posted		Delete
02/20/2023	02/26/2023	Sunday		7	Not Posted		Delete

1. Under the Corporate menu, choose *Financial Calendar*.

2. Select the Posting button and choose *Post Up*.



Tip: You can also navigate to the Corporate menu and select *Post Up*.

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Post Multiple Periods (Continued)

Using the Screen

Enterprise Manager > Corporate: Financial Calendar

Post Up

1 Date 2 Locations 3 Closing Method 4 Review

Warning: The system will automatically close all open inventory and labor transactions when you complete this Post Up process.

Post Up feature provides the ability to post up periods for one or several locations simultaneously.
For reference, your Company Week Ending Day is: Sunday

Which date would you like to post up to?

3 Post Up Through* 03/19/2023

Would you like to Post Up for Inventory, Labor, or both?

4 ☒ Inventory and Labor
☐ Inventory Only
☐ Labor Only

5 Next

- 3 On the "Dates" screen, select the *Post Up Through* date to determine when the locations will be posted through. (Dates available will be $\leq$ the current date).



Tip: When a non-post date is selected, the application will default to the closest post date prior to the date selected. For reference, your Company's Week Ending date will be listed at the top of this screen.

- 4 Choose whether to post *Inventory and Labor* (default), *Inventory Only*, or *Labor Only*.
- 5 Choose *Next* to continue.

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Post Multiple Periods (Continued)

Using the Screen

Enterprise Manager > Corporate: Financial Calendar

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Post Up

1 Date 2 Locations 3 Closing Method 4 Review

Selected post up date: 03/19/2023
Post up for: Inventory Only

Please select Location(s) to post up Select All Deselect All

Location Name ↑	Location Code	Last Inventory Post Date	Last Inventory Post User	# of unposted Inventory periods	☐
301 - Cardiff	300001	03/12/2023	Kim Possible	1	☐
302 - Dubai	300002	03/12/2023	Jose LeBlanc	1	☐
303 - Naples	300003	03/12/2023	Kim Possible	1	☐
304 - Portland	300004	12/25/2022	Ron Stoppable	12	☒
305 - Anaheim	300005	02/12/2023	Mohammad Barakat	5	☐
306 - Atlanta	300006	03/12/2023	Wade Mowry	1	☐
307 - Beverly Hills	300007	02/26/2023	CRUNCHTIME USER	3	☐
308 - Boise	300008	03/12/2023	Camille Leon	1	☐
309 - Charlotte	300009	03/12/2023	Mohammad Barakat	1	☐

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Back Next

- 6 On the "Locations" screen, check the box in the *Select* column for one or more locations.



Notes: *Select All / Deselect All* includes all locations from all pages but respects any filters applied. In other words, locations excluded by the filter settings will not be included. If a Commissary location is selected, all locations it supplies will be added automatically, which can be seen at the *Review* step.

- 7 Choose *Next* to continue. (If necessary, click *Back* to return to the previous screen.)

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Post Multiple Periods (Continued)

Using the Screen

Enterprise Manager > Corporate: Financial Calendar

Post Up

1 Date 2 Locations 3 Closing Method 4 Review

Please select closing method.

Closing Method selection is only required when posting Inventory, not Labor.

8 ☒ Primary Closing Methods
Physical inventory counts will be entered based on the Primary Closing Method defined on the Storage Locations screen.

☐ Book
Physical inventory counts will be entered as [Book - In Transit] for each product.

☐ Zero
Physical inventory counts will be set to zero for all products.

Vendor Orders

☐ Cancel open vendor orders
Unreconciled Vendor Orders and Simple Receipts with Expected Delivery Date ≤ the selected "Post Up Through" date will be canceled.

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- 8 On the "Closing Method" screen, select the desired method for posting Inventory. (Skip this step if only posting Labor.) Options include:
 - Primary Closing Methods (default)
 - Book = [Book – In Transit]
 - Zero = '0'
 - Cancel open vendor orders – Check the box if you want the Post Up process to do this for all selected locations & periods.
- 9 Choose Next to continue. (If necessary, click Back to return to the previous screen.)

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Post Multiple Periods (Continued)

Using the Screen

Enterprise Manager > Corporate: Financial Calendar

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Post Up

1 Date

2 Locations

3 Closing Method

4 Review

Selected post up date

Post up for

Closing Method

03/19/2023

Inventory Only

Primary Closing Methods

Please review before saving

Location Name	Location Code	Last Inventory Post Date	Last Inventory Post User	# of unposted Inventory periods
304 - Portland	300004	12/25/2022	Ron Stoppable	12

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Complete

- 10 On the "Review" screen, verify the Locations you plan to post, post up date, Closing Method, and the number Inventory and/or Labor periods to be posted.
- 11 When ready, select *Complete*.

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Post Multiple Periods (Continued)

Eligible Locations

A location will be available for Post Up if the following conditions are met:

- Location is active.
- Location is linked to one or more Concepts.
- Location is within the current Franchise Entity.
- Location is *not* a Ship Location.
- Location has one or more post periods available to post up based on the selected date.
(i.e. the location has one or more posted periods that are $\leq$ the selected *Post Up Through* date.)

A Few Notes:



Post Up will override any Posting Restrictions that are configured for the selected Locations. In other words, any criteria that would normally prevent a period from being posted due to the Post Restriction settings will not prevent the post-up from continuing.

When posting-up Inventory, this process will do the following:

- Cancel any scheduled (non-Final for Post) inventories.
- Cancel any open Purchase By Invoice transactions.
- Cancel any open Daily Prep transactions.

When posting-up Labor, this process will do the following:

- Automatically review any unreviewed Labor records.

If any of these conditions exist, you should examine and address them before performing this process.