

Recommended Actions

Setup Guide

Document Details

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Overview

This document provides details to help corporate users set up the Recommended Actions feature.



Download the latest version of this document here:

<https://links.crunchtime.com/EMSG-RecommendedActionsSetup>

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

Related User Group Permissions

%	Screen Name	Control Name	Description	ID #s
04	Preferences	Save	Allows users to make and save changes to Preferences & Recommended Actions.	[40][3]
72	NC-Administrative Options	Sales Forecasting	Enables "Manage Sales Forecasts" on the Sales menu.	[144][351]
72	NC-Sales Forecasting	Update/Save	Make and save changes to a sales forecast.	[173][354]
83	NC-Other Store Tasks	View/Edit Recent Vendor Order	Enables "Recent Vendor Orders" on the Purchasing menu.	[135][251]

Recommended Actions

Overview

The settings noted below will enable the Recommended Actions panel in Net-Chef, determine which insights are available, and configure thresholds for when alerts will appear in the panel.

Enable Insights

Enterprise Manager > Corporate: Recommended Actions

1. From the Corporate menu, select *Recommended Actions*.

- 2 *Enable Recommended Actions* – Toggle this setting to make the Recommended Actions icon and panel in available in Net-Chef.
- 3 *Allow locations to turn off insights* – Toggle this setting if you want to allow locations to manage which insights (actions) are available for their store. If not enabled, only corporate admins can control which insights are available.
- 4 For each Insight, toggle the setting to enable the alert.
- 5 Use the Gear (Change Parameters) icon to modify which “User Groups” and “Locations” will see the alert; all are selected by default. For some Insights, other parameters may also need to be configured, as indicated on the next page.
- 6 Click Save to confirm your settings.

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Recommended Actions (Continued)

Available Insights

- *Default Forecasting Method* – Advises users to change the default forecasting method when another method is calculated to be more accurate. Define additional parameters for “Threshold %” and “Forecasting Method” (‘Sales’, ‘Guests’, or ‘Checks’).
 - Prompt: An inventory period is posted, there is no current active recommendation, and based on the last 6 posted periods another method would yield a more accurate result.
 - Related Requirement: The location must have a forecast defined for at least one future period, and the “Preferences > Save” user group control must be enabled.
- *Employee Availability* – Indicates when Active employees haven't been scheduled within the last 4 weeks. Define additional parameter for “Future Schedule Check” to look beyond the current week's schedule.
 - Prompt: Once per week, after a labor period is posted.
 - Related Requirement: Use of Teamworx, and the location must have a schedule defined for at least one future period
- *Forecast Change* – Advises users to change their sales forecast when it varies from the AI Forecast by more than the specified percentage. Define additional parameters for “Threshold %” and “Forecasting Method” (‘Sales’, ‘Guests’, or ‘Checks’).
 - Prompt: AI generates a new sales forecast for the location, and there is no current active recommendation.
 - Related Requirements: The location must have a forecast defined for at least one future period, the sales forecasting “Default based on” setting must be ‘AI Forecast’, and the Sales Forecasting user group controls must be enabled.
- *Frequent Shift Swaps* – Indicates when employees have been declining shifts or asking for swaps too often.
 - Prompt: Once per week, after a labor period is posted.
 - Related Requirement: Once per week, after a labor period is posted, and at least one employee requested 4 or more swaps each week
- *Labor Hours Variance* – Indicates when the variance between Actual and Earned Hours exceeds the specified percentage. Define additional parameter for “Threshold %”.
 - Prompt: Once per week, after a labor period is posted.
 - Related Requirement: Use of Teamworx, the period has completed shifts, and Earned Hours were calculated for the period
- *Significant Price Change* – Indicates when the cost of an item varies from the previous cost by more than the specified percentage. Define additional parameter for “Threshold %”.
 - Prompt: After a vendor order is reconciled with a variance exceeding the threshold.
 - Related Requirement: The “NC-Other Store Tasks > View/Edit Recent Vendor Order” user group control must be enabled.
- *Weather Events* – Indicates impending severe weather that might have a significant impact on your business.
 - Prompt: Appears daily at 06:00 UTC
 - Related Requirement: The location must have a defined Zip code OR City & Country.



Recommended Actions

What Managers Will See

Net-Chef > Dashboard

Performance Metrics

Metric	Monday 01/05/2026	Tuesday 01/06/2026	Wednesday 01/07/2026	Thursday 01/08/2026	Friday 01/09/2026
Actual Net Sales	\$5,362	\$4,789			
Forecasted Sales	\$4,663	\$4,560			
Net Sales to Forecast	\$699	\$229			
Net Sales to Last Year	\$831	\$83			
Actual Labor	\$1,135	\$999			
Actual Hours	102.04	104.33			
Labor % of Net Sales	21.17%	20.86%			

Configuration

Available Insights

- ☒ Frequent Shift Swaps
- ☒ Labor Hours Variance
- ☒ Significant Price Change
- ☒ Weather Events

Recommended Actions

- Storm Warning on 01/12/2026
 - Storm Warning Issued January 12 at 12:00 PM until January 13 at 7:00 AM EST Boston MA
 - [Acknowledge](#)
- Forecast Change for week ending 01/16
 - Last reviewed your forecast, the days have changed by more than 10 days. Consider reviewing those days.
 - Dismiss
 - [Revise Forecast](#)

- 1 In the screen header, select the *Recommended Actions* icon. This icon will appear on every screen and indicates the number of actions available.
- 2 Click the relevant Action button to acknowledge the alert or go to the relevant screen to make the recommended change.
- 3 Click the 3-dots command icon, then select *Configuration* to open the panel.



Tip: The *Configuration* option only will be available if "Allow locations to turn off insights" was enabled by a Corporate user in the Recommended Actions setup screen in Enterprise Manager.

- 4 In the Configuration panel, you can toggle an event to disable it if desired.
- 5 Click the **X** (Close) icon to close the respective panels.



Important: After receiving these alerts, you need to follow up and make the recommended change.