Recommended Order

Setup Guide

Document Details

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System Requirements

- CES Version 20.26.02.05 or higher

Overview

This document provides details to help corporate users configure the parameters used in the Recommended Order formula.

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

… or scan the QR code to the left.

Related Documentation

- Recommended Order Reference Guide: https://links.crunchtime.com/RG-RecommendedOrder

Related User Group Permissions

Screen Name	Control Name	Description
Preferences	Save	Allows users to make and save changes to Preferences.

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SETUP GUIDE

Recommended Order Setup

Getting Started

What is Recommended Order?

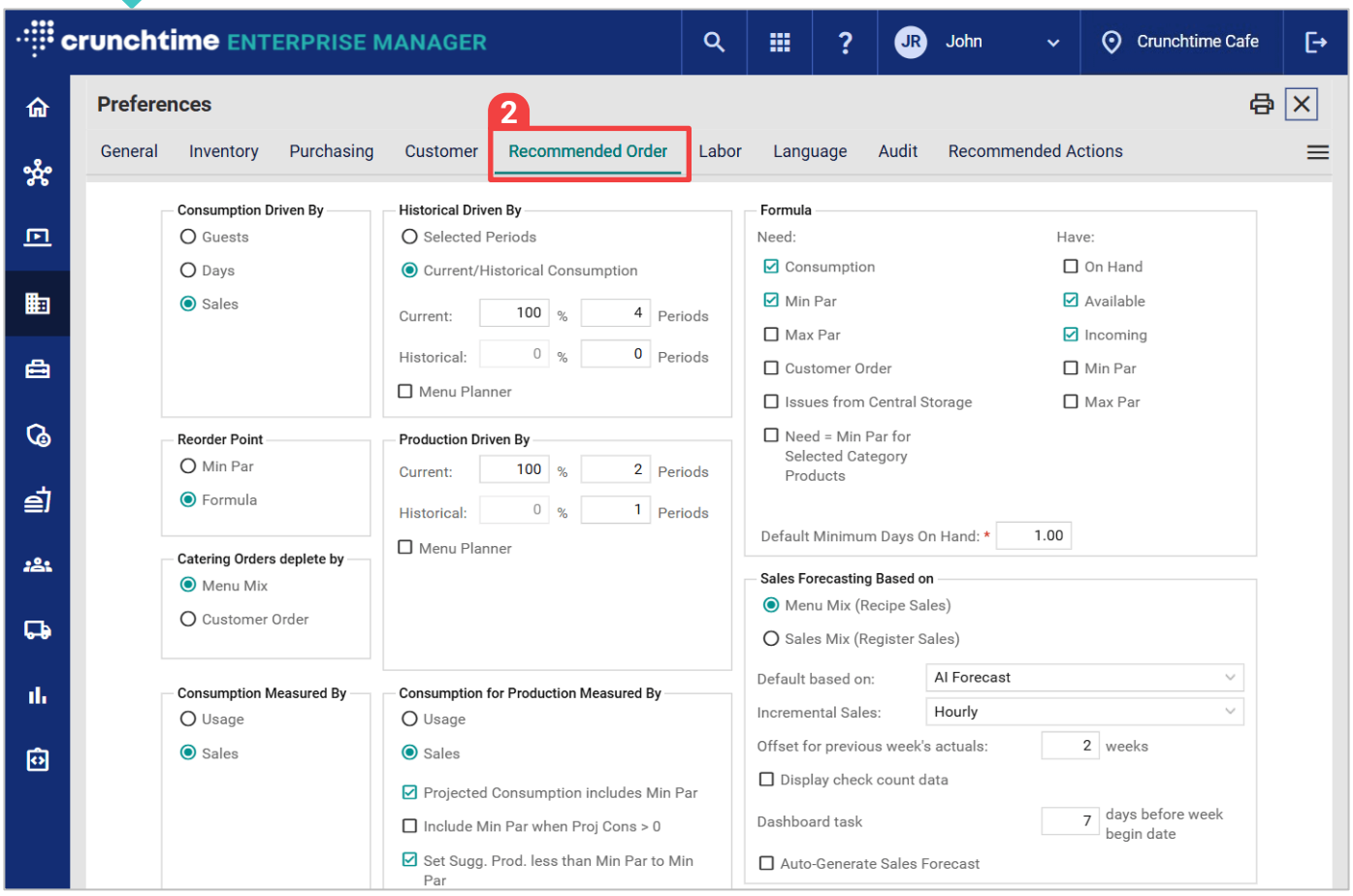
Recommended Order is a quantity calculated by Crunchtime that makes it easy to regulate inventory and lower food costs. The application recommends what should be ordered by comparing what a location *needs* to restock to what they already *have* in inventory. This formula can be summarized as:

Recommended Order = Need – Have

Recommended Order quantities are displayed and can be used when creating Vendor Orders, Master Orders, and Commissary Orders. There are many ways to configure the Recommended Order formula to fit your organization's needs. This guide will show you the parameters you need to define.

Getting Started

Enterprise Manager > Corporate: Preferences > Recommended Order



1. From the Corporate menu, select *Preferences*.
2. Choose the *Recommended Order* tab.

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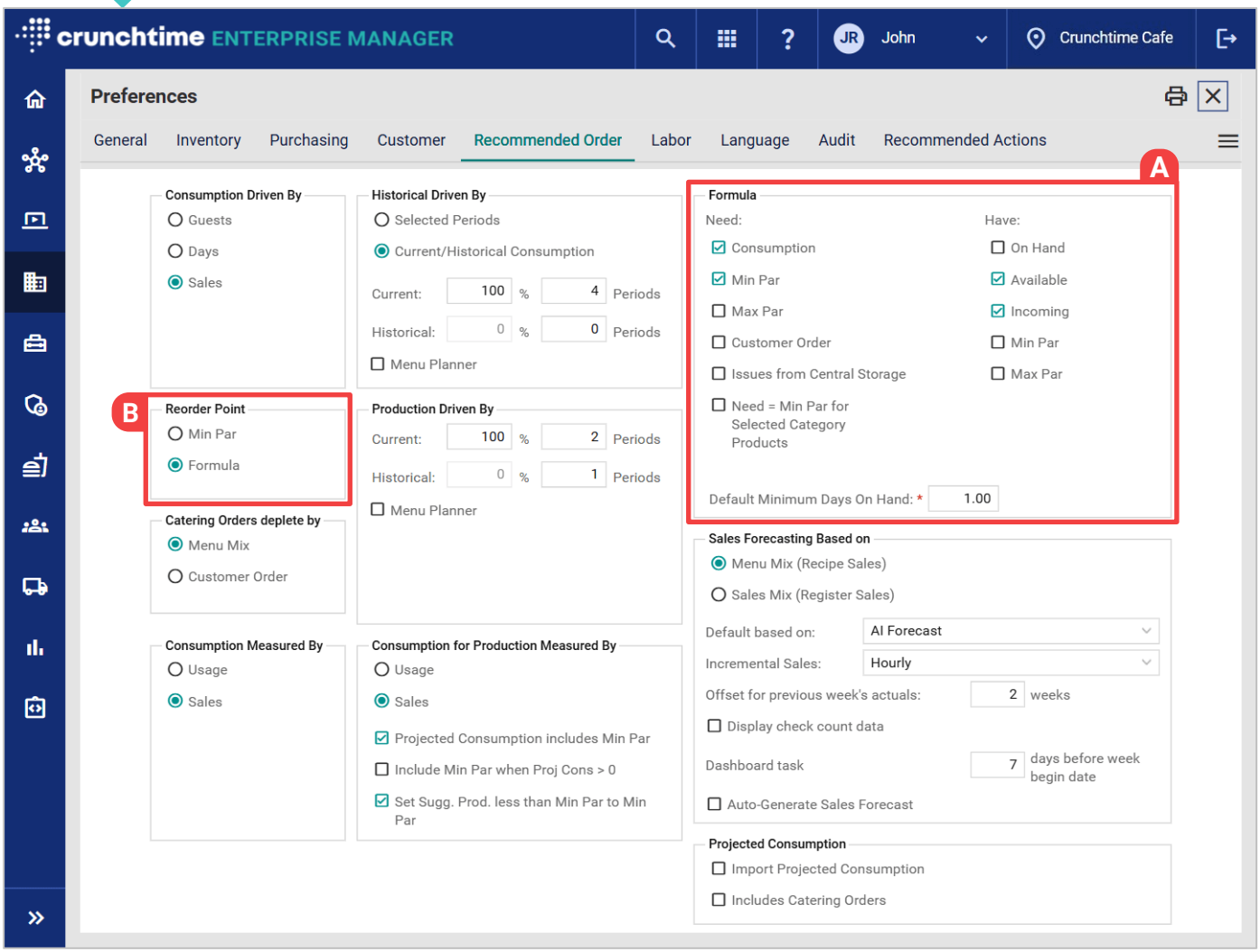
Recommended Order Setup

Configure the Formula & Reorder Point

The Recommended Order settings are the foundation of the Recommended Order formula. This is how you tell the application exactly which factors you want it to consider when recommending order quantities. Think about what information your best manager takes into consideration when they place their orders.

Recommended Order Formula

Enterprise Manager > Corporate: Preferences > Recommended Order



A The Recommended Order formula is defined by the selections made in the *Formula* settings.

B The *Reorder Point* determines when users will see Recommended Order quantities.

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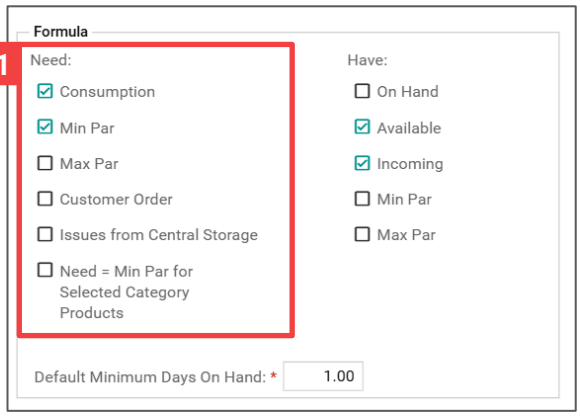
Recommended Order Setup

Configure the Formula & Reorder Point (Continued)

How much product do you need?

First, define the *Need* portion of the Recommended Order formula. This variable is used to determine how much product a location needs until their next order.

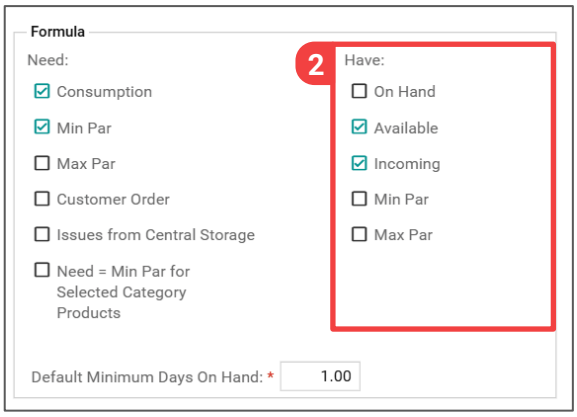
1. Check the box for each component you would like to include when calculating how much product is needed.



How much product do you have?

Next, define the *Have* portion of the Recommended Order formula. This variable is used to determine how much product the location already has. This helps make sure locations don't order more product than necessary.

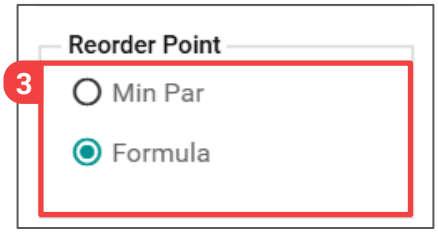
2. Check the box for each component you would like to include when calculating how much product the location has in stock.



When do you want to see Recommended Order quantities?

Next, set the *Reorder Point*. This tells the application when you would like to see the results of the Recommended Order formula as configured in the previous steps.

3. Choose when to see Recommended Order:
   - *Min Par* – Users will only see Recommended Order quantities when the On-Hand quantity dips below the product's minimum par.
   - *Formula* – Users will always see Recommended Order quantities.



Important: The rest of the document covers settings that apply when "Consumption" is included in your Recommended Order formula. We strongly advocate including Consumption, but if you choose not to include it, you can stop reading here.

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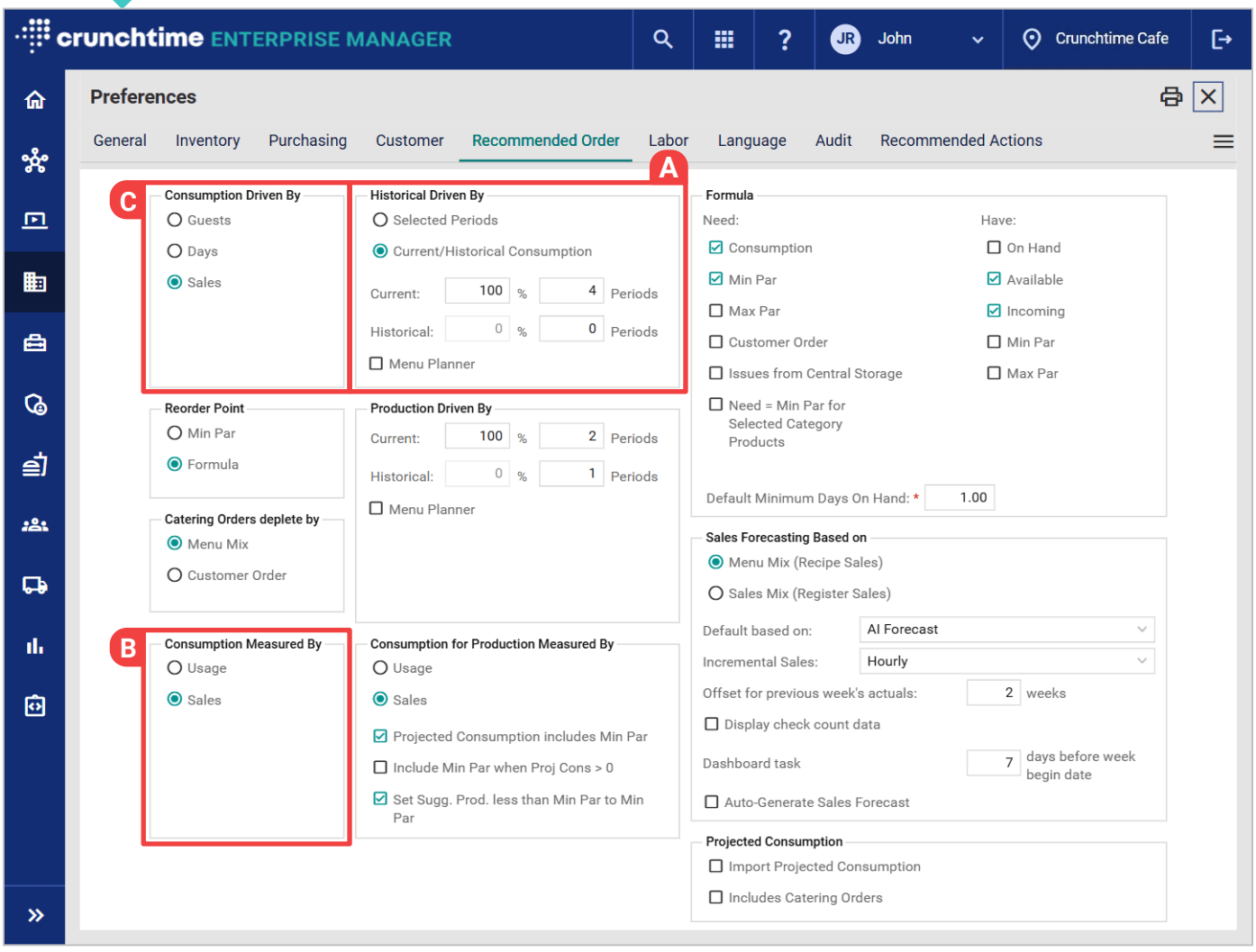
Recommended Order Setup

Configure Consumption

Consumption Overview

Consumption is a calculated value based on inventory and sales information collected by Crunchtime. This is also referred to as the "Projected" Consumption, since it represents how much product you're expected to use in the future. These next three settings are used to tell the application where and how to find the right information to calculate projected consumption based on your operational needs.

Enterprise Manager > Corporate: Preferences > Recommended Order



A *Historical Driven By* determines which periods are referenced for past consumption.

B *Consumption Measured By* determines if consumption is based on actual or theoretical usage.

C *Consumption Driven By* determines which metric drives consumption.

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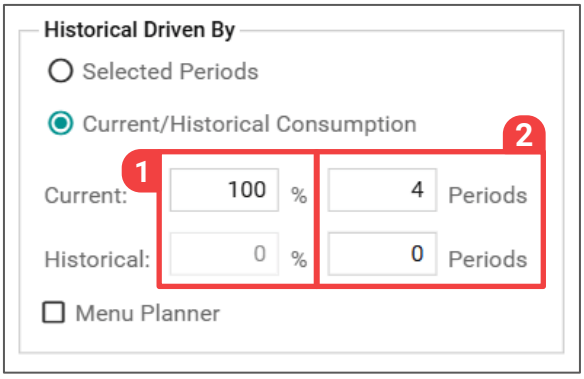
Recommended Order Setup

Configure Consumption (Continued)

Which periods should be referenced for past consumption?

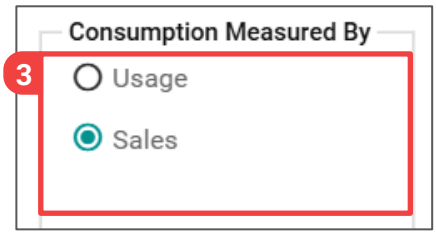
The *Historical Driven By* setting tells the application which periods to reference when calculating past consumption. You can choose to include data from the most recent post periods (Current) and/or data from the previous year (Historical). This setting also enables you to prioritize data from a particular period by adding a higher percentage to that time frame.



1. Enter a percentage to indicate how heavily the current/historical data should be weighted.
2. Enter the number of periods that will be referenced when calculating past usage (if more than 1 period is entered, the application will take the average of these periods).

How much product was consumed?

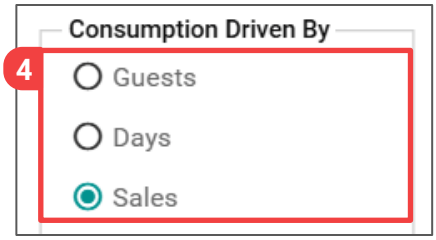
Next, we will define *Consumption Measured By*. This setting tells the application how to determine the amount of product that was used. You have two options when deciding how to measure consumption:



3. Choose how you want to measure consumption:
   - *Usage* – This selection will use actual consumption based on inventory depletion (which includes factors such as waste and over-portioning).
   - *Sales* – This selection will use theoretical consumption based only on what was used to fulfill sales.

Which metric drives your consumption?

Finally, we will define *Consumption Driven By*. This setting is used to determine which metric will drive your past and projected consumption.



4. Choose the metric that will drive past and future consumption:
   - *Guests* – Quantities will be based on past and forecasted guest counts.
   - *Days* – Quantities will be based on the number of days covered by the order.
   - *Sales* – Quantities will be based on past and forecasted monetary sales.

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Recommended Order Setup

Tips for Success

- **Review your Sales Forecast:** Crunchtime will scale up or down any order quantities based on your established forecast.
- **Keep a waste log:** Use *Inventory Adjustment* transactions to record daily waste, especially for high-cost items.
- **Record Daily Prep:** Do you keep a high volume of prepared goods on the shelf? Implement *Daily Prep* or use the *Kitchen Sync* mobile app to ensure raw ingredients are removed from inventory when you prep a recipe. Once that stock is removed, Crunchtime will make sure the product is replenished using Recommended Order.
- **Place all purchase orders through Crunchtime:** If you placed a phone or web portal order, this incoming quantity may not be reflected in the Recommended Order formula. In addition, if you ran to the grocery store, be sure to record this as a *Simple Receipt* so your stock on hand is accurate.
- **Check Projected Consumption:** If this quantity is too low or too high, you may have an issue with recipe setup and theoretical depletion. Review the *Actual vs Theoretical* report to see each amount of product used to make each menu item.
- **Enable *Need = Min Pars for Selected Category Products*:** If you want to get Recommended Order for products that do not have consumption from sales, try adding a *Minimum Par* to those non-stock products and then enable the *Need = Min Par for Selected Category Products* for the categories containing those products.
- **Add safety stock:** If you find that Recommended Order quantities are too lean for your operations, try adding *Min Par* to the 'Need' variable of the formula, or updating the *Minimum Days on Hand* to add extra consumption days for certain products.

Note: All of the settings in this document refer to the *Preferences* screen, which is used to set the global defaults for all new Locations. If necessary, these settings can be adjusted for a specific Location on the Recommended Order tab in that Location's detail screen.

Want More Info? Check out the EMRG - Recommended Order reference guide for more details on each Recommended Order setting and an example that breaks down the formula's calculation.

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