

Manage Storage Locations

Quick Start Guide

Document Details

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Overview

This guide shows you how to sequence products in a storage location, change product/storage combinations, and remove products from a storage location. Managing storage locations to reflect where product is actually stored allows your *Count Sheet* and *Data Entry* screen to match what is physically stored in each area. When the page matches your storage, we call that “shelf-to-sheet”.



Download the latest version of this document here:

<https://links.crunchtime.com/NCQS-ManageStorageLocations>

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



Watch the video tutorials:

[NCI 101 - Primary & Secondary Storages](#)

[NCI 105 - Storage Sequencing & Alternate Count Units](#)

Related Documentation

- NCQS –Set Alternate Count Units: <https://links.crunchtime.com/NCQS-SetAlternateCountUnits>

Related User Group Permissions

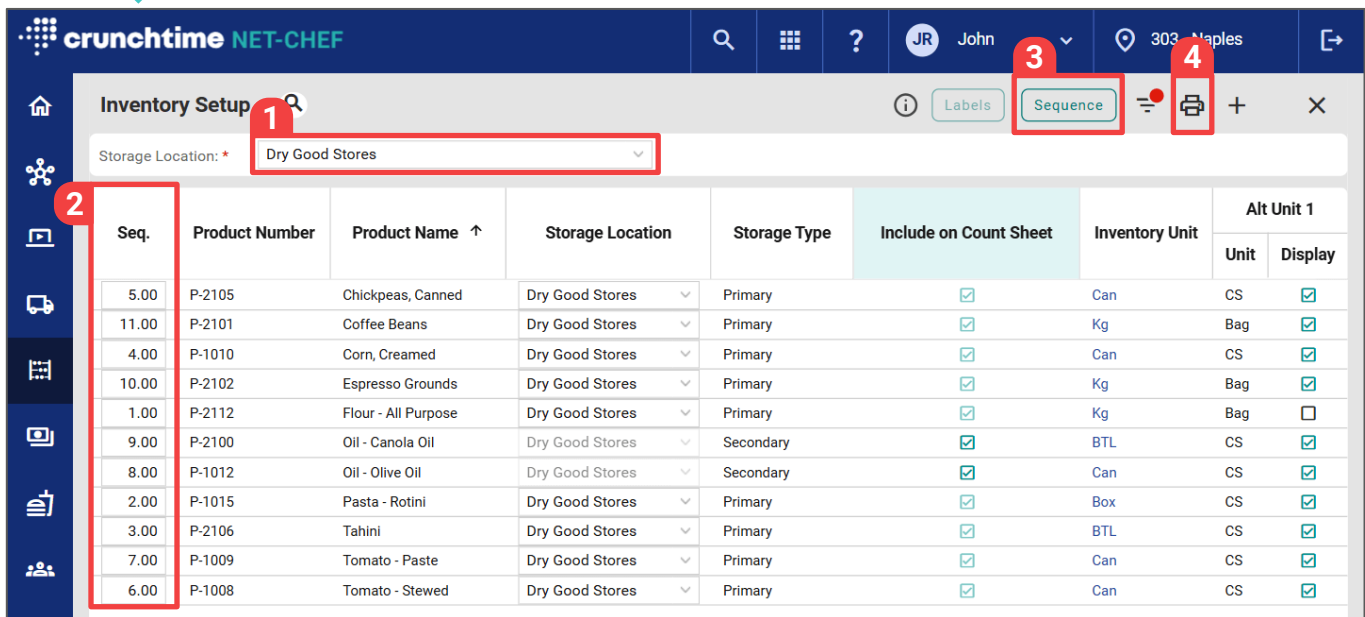
Screen Name	Control Name	Description
NC-Administrative Options	Inventory Setup	Enables this option on the Inventory menu.

Manage Storage Locations

Sequence Products

Products can be arranged on the Inventory Setup screen in the same order they are stored on the shelf. The new product sequence will appear on the Count Sheet and Data Entry screens, simplifying the process of physically counting inventory in these storage locations each period.

Net-Chef > Inventory: Inventory Setup



The screenshot shows the 'Inventory Setup' screen in the Net-Chef application. The interface includes a top navigation bar with the 'crunchtime NET-CHEF' logo and user information. A search bar at the top right shows '303 - Naples'. Below the navigation bar, the 'Inventory Setup' title is followed by a search icon and a 'Labels' button. A 'Storage Location' dropdown menu is set to 'Dry Good Stores'. The main table lists products with columns for 'Seq.', 'Product Number', 'Product Name', 'Storage Location', 'Storage Type', 'Include on Count Sheet', 'Inventory Unit', and 'Alt Unit 1'. The 'Seq.' column contains values from 5.00 down to 6.00. A red box highlights the 'Seq.' column, and a red box highlights the 'Sequence' button in the top right. A red box highlights the 'Disk' (Save) button in the top right. A red box highlights the 'Storage Location' dropdown menu.

Seq.	Product Number	Product Name	Storage Location	Storage Type	Include on Count Sheet	Inventory Unit	Alt Unit 1
5.00	P-2105	Chickpeas, Canned	Dry Good Stores	Primary	☒	Can	CS
11.00	P-2101	Coffee Beans	Dry Good Stores	Primary	☒	Kg	Bag
4.00	P-1010	Corn, Creamed	Dry Good Stores	Primary	☒	Can	CS
10.00	P-2102	Espresso Grounds	Dry Good Stores	Primary	☒	Kg	Bag
1.00	P-2112	Flour - All Purpose	Dry Good Stores	Primary	☒	Kg	Bag
9.00	P-2100	Oil - Canola Oil	Dry Good Stores	Secondary	☒	BTL	CS
8.00	P-1012	Oil - Olive Oil	Dry Good Stores	Secondary	☒	Can	CS
2.00	P-1015	Pasta - Rotini	Dry Good Stores	Primary	☒	Box	CS
3.00	P-2106	Tahini	Dry Good Stores	Primary	☒	BTL	CS
7.00	P-1009	Tomato - Paste	Dry Good Stores	Primary	☒	Can	CS
6.00	P-1008	Tomato - Stewed	Dry Good Stores	Primary	☒	Can	CS

- 1 Select the desired *Storage Location* from the drop-down menu.
- 2 In the *Sequence* column, number each product in the order they are counted in the storage location. Enter '1' for the first product on the shelf, '2' for the second product, and so on.
- 3 Select the *Sequence* button. This will reorder the products by the numbers entered in Step 2 in descending order, so the lowest number will appear at the top of the screen, and the largest number will appear at the bottom of the screen.
- 4 Select the *Disk* (Save) button to finalize your changes.



Tip: To insert a product into the sequence between two other sequenced products, enter a decimal sequence number that falls between the numbers of the other two products. For example, to add a product to the sequence between the items currently numbered 4 and 5, enter a sequence number of 4.1.

You can also drag and drop a product row into the desired position between other products. When you select *Sequence*, the numbers in the sequence column will be automatically adjusted to sequential whole numbers.

Manage Storage Locations

Change the Primary Storage

Storage Locations are areas within a location where product is physically kept.

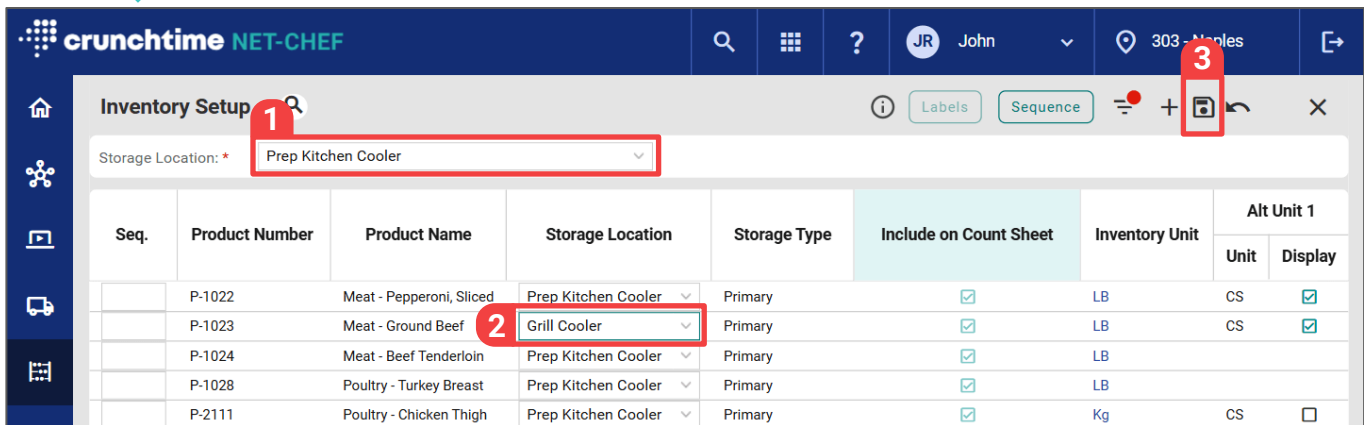
There are two types of Storage Locations:

- **Primary:** This is the main location where a product is stored. The application will use this storage to add and deplete inventory as product is bought and sold.
- **Secondary:** These are any additional areas where a product is stored at a location. These storages allow product to be listed in multiple storage areas on the *Count Sheet* and *Data Entry* screens.



Note: Each product must be assigned a Primary Storage (other than “Unassigned”) before it can be purchased, issued, or inventoried.

Net-Chef > Inventory: Inventory Setup



The screenshot shows the 'Inventory Setup' screen in Net-Chef. At the top, there is a search bar and a dropdown menu for 'Storage Location' currently set to 'Prep Kitchen Cooler'. Below this is a table with columns: Seq., Product Number, Product Name, Storage Location, Storage Type, Include on Count Sheet, Inventory Unit, and Alt Unit 1. The table lists several products, including 'Meat - Pepperoni, Sliced', 'Meat - Ground Beef', 'Meat - Beef Tenderloin', 'Poultry - Turkey Breast', and 'Poultry - Chicken Thigh'. Red boxes and numbers 1, 2, and 3 highlight the steps to change the primary storage location: 1. Select the current Primary Storage Location from the drop-down menu. 2. Locate the Product you wish to update and select the new Primary Storage from the product's Storage Location drop-down menu. 3. Select Save. The storage selected in Step 2 will become the new Primary Storage Location.

Seq.	Product Number	Product Name	Storage Location	Storage Type	Include on Count Sheet	Inventory Unit	Alt Unit 1
							Unit Display
	P-1022	Meat - Pepperoni, Sliced	Prep Kitchen Cooler	Primary	☒	LB	CS ☒
	P-1023	Meat - Ground Beef	Grill Cooler	Primary	☒	LB	CS ☒
	P-1024	Meat - Beef Tenderloin	Prep Kitchen Cooler	Primary	☒	LB	
	P-1028	Poultry - Turkey Breast	Prep Kitchen Cooler	Primary	☒	LB	
	P-2111	Poultry - Chicken Thigh	Prep Kitchen Cooler	Primary	☒	Kg	CS ☐

In the instance that a product is being physically placed in a new location, the Primary Storage should be updated in Net-Chef. This will ensure the application is adding and depleting product from the correct area.

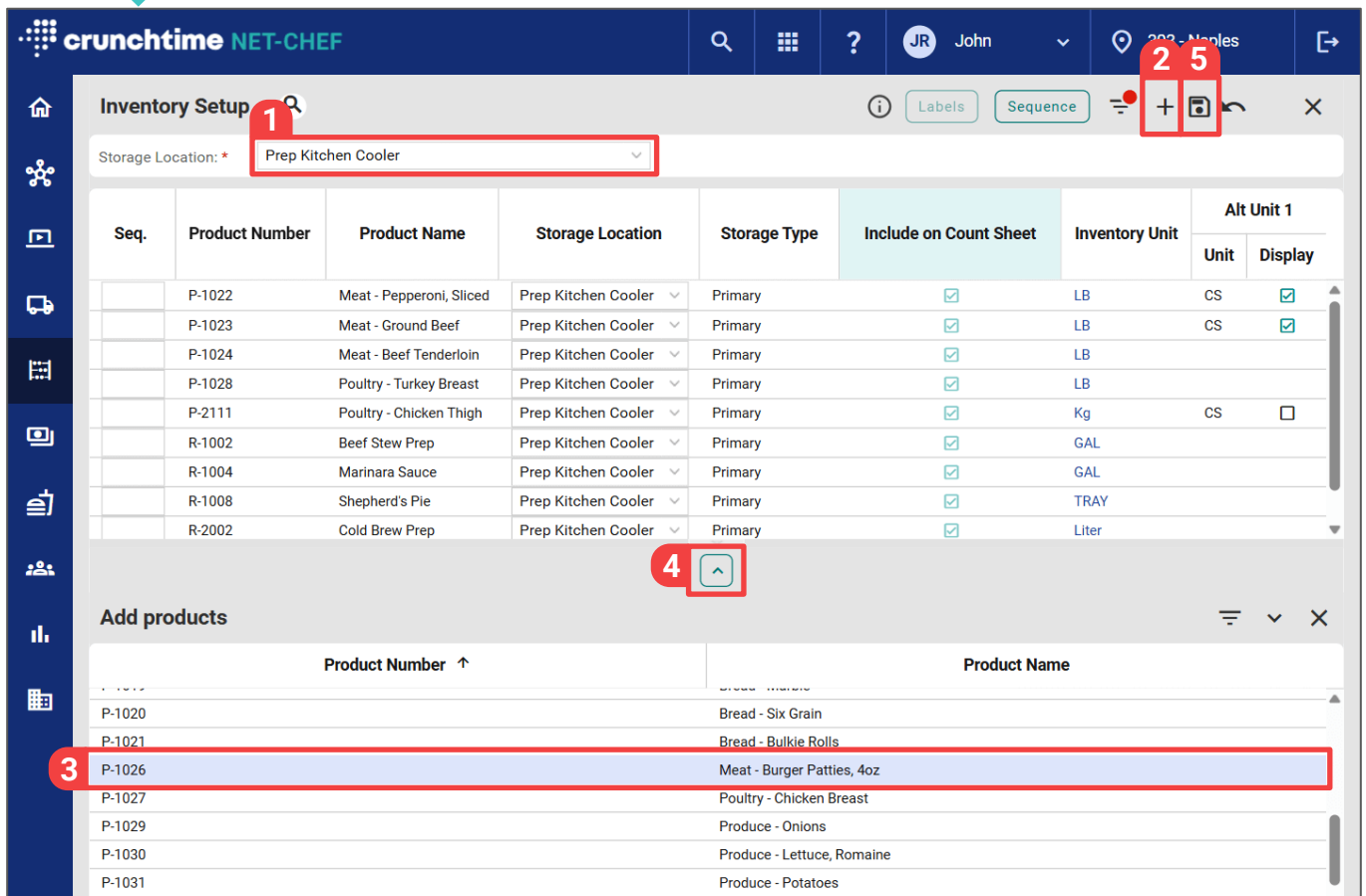
- 1 From the Inventory Setup screen, select the current *Primary Storage Location* from the drop-down menu.
- 2 Locate the Product you wish to update and select the new Primary Storage from the product's *Storage Location* drop-down menu.
- 3 Select Save. The storage selected in Step 2 will become the new Primary Storage Location. The old Primary Storage will become a *new Secondary Storage* for this product. All inventory that was in the old Primary Storage will be moved to the new Primary Storage.

Manage Storage Locations

Add a Secondary Storage

If a product is stored in multiple places, one or more Secondary Storage Locations can be added for that product. This allows the product to appear in multiple areas on the Count Sheet and Data Entry screens, making it easy for you to count the product stored in each area separately without needing to do any additional math later.

Net-Chef > Inventory: Inventory Setup



The screenshot shows the 'Inventory Setup' screen in the Net-Chef application. The 'Storage Location' dropdown is set to 'Prep Kitchen Cooler'. A table lists products with their storage locations and types. The 'Add products' panel is open, showing a list of products. The product 'Meat - Burger Patties, 4oz' is selected. The 'Up Arrow' button is highlighted, and the 'Save' button is also highlighted.

Seq.	Product Number	Product Name	Storage Location	Storage Type	Include on Count Sheet	Inventory Unit	Alt Unit 1
							Unit Display
	P-1022	Meat - Pepperoni, Sliced	Prep Kitchen Cooler	Primary	☒	LB	CS ☒
	P-1023	Meat - Ground Beef	Prep Kitchen Cooler	Primary	☒	LB	CS ☒
	P-1024	Meat - Beef Tenderloin	Prep Kitchen Cooler	Primary	☒	LB	
	P-1028	Poultry - Turkey Breast	Prep Kitchen Cooler	Primary	☒	LB	
	P-2111	Poultry - Chicken Thigh	Prep Kitchen Cooler	Primary	☒	Kg	CS ☐
	R-1002	Beef Stew Prep	Prep Kitchen Cooler	Primary	☒	GAL	
	R-1004	Marinara Sauce	Prep Kitchen Cooler	Primary	☒	GAL	
	R-1008	Shepherd's Pie	Prep Kitchen Cooler	Primary	☒	TRAY	
	R-2002	Cold Brew Prep	Prep Kitchen Cooler	Primary	☒	Liter	

Product Number	Product Name
P-1020	Bread - Six Grain
P-1021	Bread - Bulkie Rolls
P-1026	Meat - Burger Patties, 4oz
P-1027	Poultry - Chicken Breast
P-1029	Produce - Onions
P-1030	Produce - Lettuce, Romaine
P-1031	Produce - Potatoes

- 1 Choose the desired Secondary Storage from the *Storage Location* drop-down menu.
- 2 Select the *Add* button. The selection panel will slide open from the bottom of the screen.
- 3 Click or tap on the desired product from the list.
- 4 Choose the *Up Arrow* (^) to add the selected products.
- 5 Select *Save*. The Storage Type for this product will automatically be set to *Secondary*.

Manage Storage Locations

Remove a Product from a Storage

Removing a Product/Storage Location combination improves the accuracy of inventory management by excluding products from the count sheet under a storage location where they are no longer kept. This results in a cleaner and more accurate count sheet.



Warning: Do not remove products from a storage once inventory has started or before it has been posted. Doing so can result in inaccurate inventory counts.

Net-Chef > Inventory: Inventory Setup

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NET-CHEF

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Inventory Setup

Labels

Sequence

Storage Location: *

Prep Kitchen Cooler

Seq.	Product Number	Product Name ↑	Storage Location	Storage Type	Include on Count Sheet	Inventory Unit	On Hand
	R-1002	Beef Stew Prep	Prep Kitchen Cooler	Primary	☒	GAL	7.00
	P-1013	Cheese - Cheddar, Mild	Prep Kitchen Cooler	Secondary	☐	LB	10.00
	R-2002	Cold Brew Prep	Prep Kitchen Cooler	Primary	☒	Liter	8.00
	R-2004	Hummus Prep	Prep Kitchen Cooler	Primary	☒	Kg	12.00
	R-1004	Marinara Sauce	Prep Kitchen Cooler	Primary	☒	GAL	6.00
	P-1024	Meat - Beef Tenderloin	Prep Kitchen Cooler	Primary	☒	LB	890.00

- 1 Select a *Storage Location* from the drop-down menu.
- 2 Uncheck the box in the *Include on Count Sheet* column for the desired product(s) to remove the product/storage combination.

A By default, the screen is filtered to display only products that have this box checked for the selected Storage. If necessary, adjust the *Filters* to show all products.
- 3 Select Save.

Remove from a *Primary* Storage

Products may be removed from a Primary Storage only when the *On Hand* quantity is zero. If the *On Hand* does not equal zero, an *Inventory Adjustment* can be used to remove the product from inventory prior to deactivation. Another option is to update the product's Primary Storage to a new area. This will update the old Primary storage to a new Secondary storage, at which point it may be removed.

Remove from a *Secondary* Storage

Products may be removed from a Secondary Storage even if there is currently product *On Hand* in this storage. If the storage has an *On Hand* quantity other than zero, the product will be transferred to the *Primary* Storage Location when removed from the *Secondary* Storage. This transaction will be recorded as a Storage Transfer.



Note: Location Product records will not be deactivated during this process. This will only occur after the on-hand quantity is zero, and the product is not purchased, issued, or transferred for a designated number of post periods. The number of post periods will be determined by the '*Deactivate Products after __ Post Cycles*' preference in Enterprise Manager.