



Schedule Inventory Counts

Quick Start Guide

Document Details

Document #: 161_QS1000_221115

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Overview

This document describes how to schedule mid-period inventories and copy them to other periods.

System Requirements

- CES Version 10.00.00 or higher



Be sure to grab the latest version of this document here:

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

OR by scanning the QR code to the left.

View the related tutorial on MainCourse – NCI 108 - Schedule Inventory Counts:

Related User Group Permissions

Screen Name	Control Name	Description
NC-Inventory	Physical Inventory	Controls whether the "Create/Review Inventories" option is available on the menu and the "Count Sheet" link is available for an Inventory event.
NC-Inventory	New Scheduled Inventory	Controls whether the "New Scheduled Inventory" button is visible in the Physical Inventory summary screen, whether users may "Cancel" a locally-created inventory event, and whether users can copy inventory events.



Schedule Inventory Counts

New Scheduled Inventory

The Physical Inventory module lets users schedule inventory counts for various days within a post period. For example, if the post period ends on Wednesday but the Prep Kitchen Cooler needs to be counted on Sunday, that inventory can be scheduled, a count sheet printed just for that Storage Location, and the counts entered on Sunday.



Note: Inventory counts can only be scheduled for a particular date if that date is within an open (unposted) period.

Net-Chef > Inventory: Create/Review Inventories

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October 3 - October 9, 2022 | Local | Corporate | Last Recalculation Date: 09/27/2022 16:02

Performance Metrics

Metric	Monday 10/03/2022	Tuesday 10/04/2022	Wednesday 10/05/2022	Thursday 10/06/2022	Friday 10/07/2022	Saturday 10/08/2022	Sunday 10/09/2022	Week-to-Date	Period-to-D...
Inventory									
1 Inventory Overview									
2 Create/Review Inventories									
3 Create Location Transfer									
Recent Location Transfers									
Create Inventory Adjustment									
Create Recipe Adjustment									
View Recent Adjustments									
Inventory Setup									
Location Products									
Reports									

Physical Inventory

Post Period: 11/01/2022 | New Scheduled Inventory

Date	Type	Detail	Status	Process
11/01/2022	Final for Post		Scheduled	Count Sheet

Today's Sales (21:00) \$2,453.40
Sales (WTD) \$4,839.75
Today's Labor (0:27) \$480.98
Labor Cost (WTD) 22.79%

Bar chart showing sales trends over time.

- 1 From the Inventory menu, select *Create/Review Inventories*.
- 2 Select the appropriate *Post Period*.
- 3 Click *New Scheduled Inventory*.

(Continued)



Schedule Inventory Counts (Continued)

New Scheduled Inventory (Continued)

Net-Chef > Inventory: Create/Review Inventories > New Scheduled Inventory

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Physical Inventory for Post Period 11/01/2022

Date: 10/30/2022

Save and Close Close

4

5

6

Storage Location

	Storage Location
☐	Bakery Stores
☐	Beverage Stores
☐	Deli Cabinet
☐	Deli Cooler
☐	Dry Good Stores
☐	Grill Cooler
☒	Prep Kitchen Cooler
☐	Produce Cooler
☐	Unassigned
☐	Walk In
☒	Wine Stores

- 4 Select a *Date* from the drop-down.
- 5 Inventory Types are displayed as section groups. Inventory counts can be scheduled by “Template”, “User Defined Category”, “Category”, “Subcategory”, “Microcategory”, “Storage Location”, or for “All Products”. Click the expander (**V**) control at the right of a section header to display the options available for that type.
- 6 Check the box corresponding to the appropriate selection(s) from the list of those available. *(The first option in the list will select the entire list.)*
- 7 Repeat steps 5 & 6 for each Inventory Type to be created for the selected date.
- 8 If desired, repeat Steps 4 - 7 to schedule counts for additional dates within the period.
- 9 When finished, select *Save and Close*.



Tip: Any variances captured during a scheduled inventory become adjustments, so that the inventory data remains accurate.





Copy Inventory Counts

Copy Scheduled Inventory

Users can copy scheduled inventory events created for one post period to other future post periods. This can include dates prior to that of the inventory event being copied, as long as the new date is in an open period. Inventory events will be copied to the same day of the week within the new post period.

Net-Chef > Inventory: Create/Review Inventories

CrunchTime! Net-Chef

October 3 - October 9, 2022 | Local | Corporate | Last Recalculation Date: 09/27/2022 16:02

Performance Metrics

Metric	Monday 10/03/2022	Tuesday 10/04/2022	Wednesday 10/05/2022	Thursday 10/06/2022	Friday 10/07/2022	Saturday 10/08/2022	Sunday 10/09/2022	Week-to-Date	Period-to-D...
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Inventory

- 1 Inventory Overview
- 2 Create/Review Inventories**
- Create Location Transfer
- Recent Location Transfers
- Create Inventory Adjustment
- Create Recipe Adjustment
- View Recent Adjustments
- Inventory Setup
- Location Products
- Reports

Physical Inventory

Post Period: 11/01/2022 | New Scheduled Inventory | **3 Copy Scheduled Inventory**

Date	Type	Detail	Status	Process
10/28/2022	User Defined Category	Critical Items	Scheduled	Count Sheet Cancel
10/30/2022	Storage Location	Prep Kitchen Cooler	Scheduled	Count Sheet Cancel
10/30/2022	Storage Location	Wine Stores	Scheduled	Count Sheet Cancel
11/01/2022	Final for Post		Scheduled	Count Sheet

Today's Sales (21:00)
\$2,453.40
↓\$347.60 to forecast
↓\$128.25 to SDLW
↑\$89.40 to SDLY
\$9.93 Avg. Sales per Check

Sales (WTD)
\$4,839.75
↓\$342 to forecast
↓\$880 to last week
↑\$585 to last year
↓14.51% to budget

Today's Labor (0:27)
\$480.98

Labor Cost (WTD)
22.79%

Bar chart showing sales and labor costs over time.

- 1 From the Inventory menu, select *Create/Review Inventories*.
- 2 Select the appropriate *Post Period*.
- 3 Click *Copy Scheduled Inventory*.

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Copy Inventory Counts (Continued)

Copy Scheduled Inventory (Continued)

Net-Chef > Inventory: Create/Review Inventories > Copy Scheduled Inventory

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Select the Scheduled Physical Inventory event(s) to copy.

Date	Type	Detail	Day	Post ...	Post Period
10/28/2022	User Defined Category	Critical Items	Friday	3	11/08/2022
10/30/2022	Storage Location	Prep Kitchen Cooler	Sunday	5	11/15/2022
10/30/2022	Storage Location	Wine Stores	Sunday	5	11/22/2022
					11/29/2022
					12/06/2022
					12/13/2022
					12/20/2022
					12/27/2022

Save and Close Close

- 4 The left portion for the screen lists the scheduled Physical Inventory events, one row for each Date/Type/Detail/Day combination. Check the box corresponding to the event(s) to be copied, or check the box in the header row to select all scheduled events.
- 5 The right portion of the screen lists all eligible Post Periods to which the events can be copied. Check the box corresponding to the each period to which to copy, or check the box in the header row to select all eligible Post periods.
- 6 When finished, select *Save and Close*.



Note: When the list of events displayed in the summary screen includes Location Inventory Schedules created by a corporate user in Enterprise Manager, the notation “(Corporate)” will appear on-screen as part of the “Type” label for each of these events. Net-Chef users **are able** to copy corporately scheduled events.

