CRUNCHTIME! ENTERPRISE MANAGER

Prepare to Import Company Products

Setup Guide

Document Details

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Overview

This guide will prepare you to import your Company Products into your CrunchTime Database. The goal of the import is to get your Products into the database accurately so you can track their purchase, use and costs.

Be sure to grab the latest version of this document here:
https://links.crunchtime.com/SG-PrepareToImportCompanyProducts
OR by scanning the QR code to the left.

Watch the video: The following course is the fastest way to see what it is and how it works. Click the course link (or copy the URL into your browser): Product Basics - https://links.crunchtime.com/PT-EMS103-ProductBasics

Related User Group Permissions

Screen Name	Control Name	Description
Company Products List	Add/Delete	Add a new company product, delete a product from the list.
Company Product Details	Add/Delete/Save	Add Company Product details, delete non-required information, make and save changes.
Company Products Setup – Inventory Units	Add/Delete/Save	Make and save changes to the “Count Units” tab.

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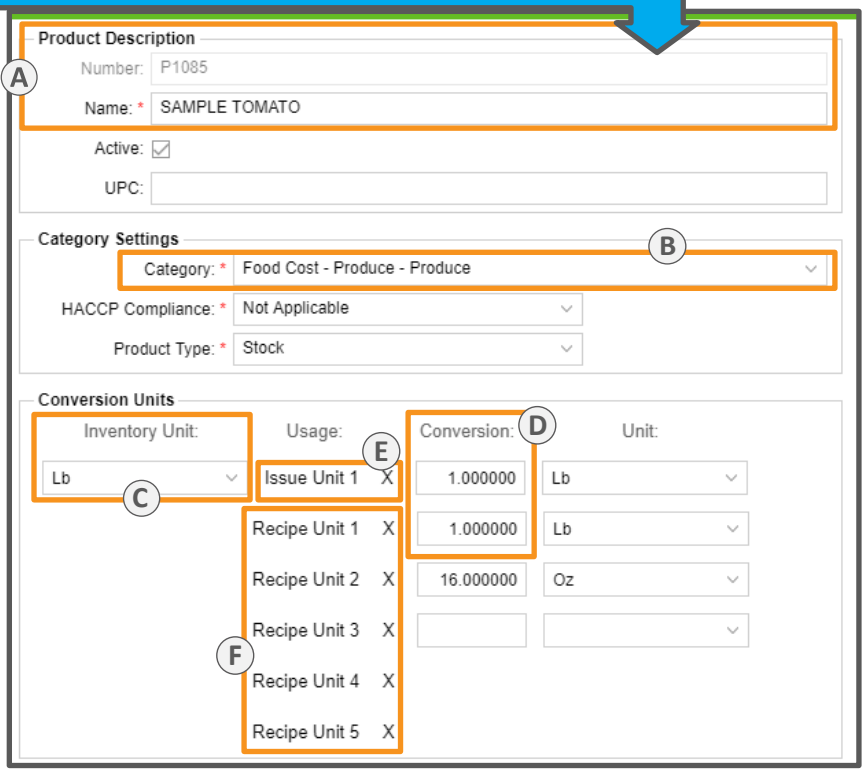
Prepare to Import Company Products

What are Company Products?

Company Products are the list of all Products across the entire company that can be used in the application via purchasing, recipes and inventory.

What are the attributes of a Company Product?

Enterprise Manager > Products: Company Products > Edit > Company Product tab



(A) **Product Description:** Each Product requires a unique Name and Number that does not match any other Company Product or Recipe in the application. The Number can be auto-populated by CrunchTime.

Standards should be set for naming formats (eg. All caps, mixed caps, dashes, dollar signs) to make reading reports and lists easier.

Product numbering should begin with a 'P' to easily identify Products vs Recipes when they are combined in reports and lists.

(B) **Category:** Products require a Category/Subcategory/Microcategory assignment for reporting and to link the Product to a General Ledger account.

(C) **Inventory Unit:** All Products will be valued by 1 global unit of measure, known as the Inventory Unit. All other units of measure such as recipes, purchasing, and alternate counting options will convert back to the Inventory Unit.

This unit of measure should never be changed or it will skew historical data

It should be a sensible unit (not too general; not too small). Weighted units are recommended (eg. Lbs, Liter, Oz.) since they do not change over time as does 'Case' which can vary by supplier.

(D) **Conversions:** Conversions are used to tell the application what calculation to use when using the product in other units of measure other than the Inventory Unit.

(E) **Issue Unit:** This unit is used when a Commissary is supplying the Product to a Location.

(F) **Recipes Units:** A Product can have up to 5 different Recipe Units to be able to use the Product as a Component, or ingredient, of a Recipe.

Tip: The majority of your Company Products will be added using the Data Import Worksheet provided to you by your deployment team. If any major product changes happen in the future, products can be added and edited both manually (shown here) and by import (see next page).

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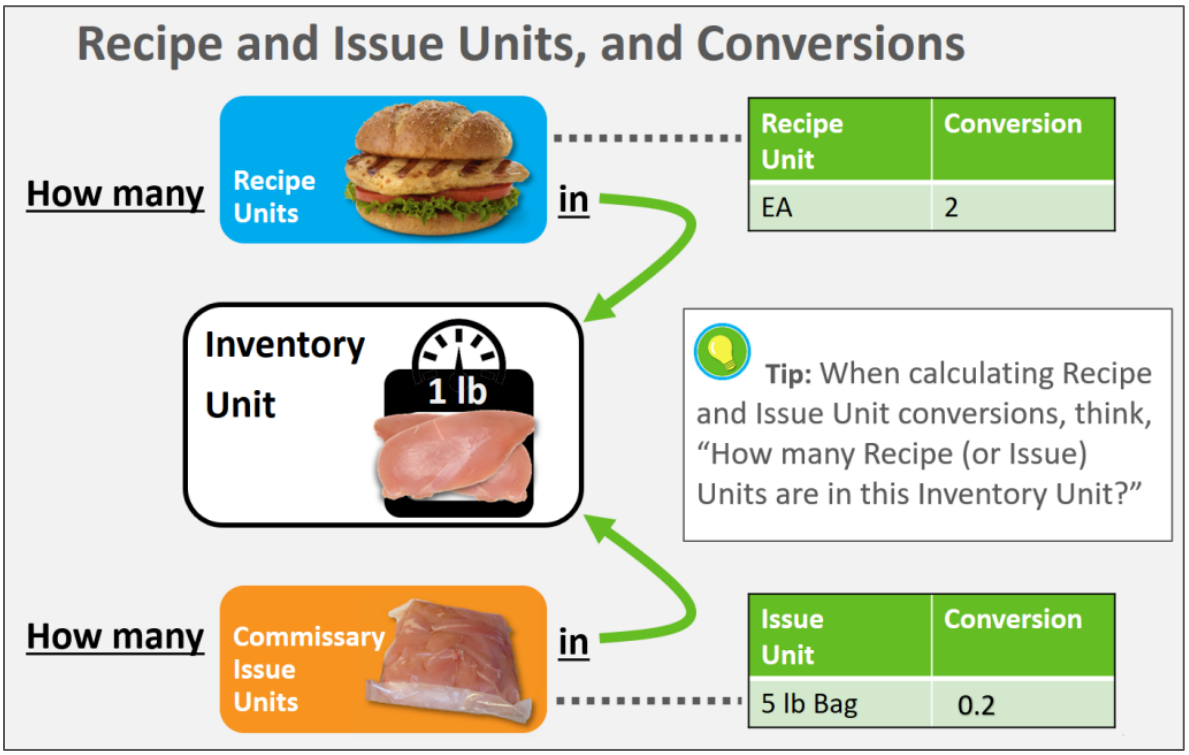
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Additional Import Attributes

Alternate Count Units: These are optional units of measure that you can use to count Inventory. Other than the Inventory Unit, a Product can have 3 additional count units. The Conversion would be "how many of the Count Unit are in the Inventory Unit". An example of this would be if the Product's Inventory unit was Lb. and the Alternate Count Unit was a 5lb Case, the conversion would be 0.2.

Wait what? How should I think about Conversions?

To keep your inventory accurate, all Company Products make use of Conversions to convert Recipe Units, Commissary Issue Units, and Alternate Count Units to a single Global unit of measure…The *Inventory Unit*:



Import Company Products

The goal of the import is to get your Products into the database accurately so you can track their purchase, use and costs. The fastest and most accurate way to do this is to use the Data Import Worksheet provided to you by your deployment team:

Always = 1	Name must be the same throughout the workbook	Must be unique #	Defaults to Y	Not used	Not used	Global Reporting Unit (i.e Gal, Lb) - Use drop down	Same as 'G'	Always = 1	Not used	Not used	Not used	Most common recipe pack type for product	How many of 'M' in 'G'		
Record Type (1) 1=Header	Product Name** (80)	Product Number** (40)	Active (1) Y/N	Primary UPC	Univ Product Number	Inventory Unit Pack	Issue Unit 1 Pack	Issue 1 Conv.	Issue 2 Pack	Issue 2 Conv	Issue 2 Invert Flag	Recipe Unit 1 Pack	Recipe Unit 1 Conv	Recipe Unit 2 Pack	Recipe Unit 2 Conv
1	Sample Tomato	P1000	Y			LB	LB	1				LB	1	OZ WT	16

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