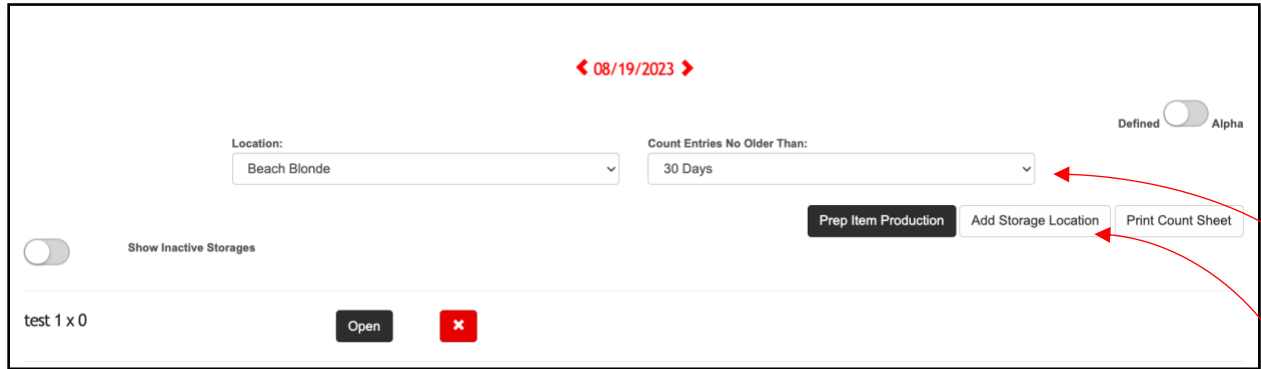




Inventory Taker

The Inventory taker allows you complete control and customization of your storage locations and component counts and allows users to take inventory directly from a smart phone or tablet.

Navigate to: **Operations > Inventory Taker**



Filters: The **Location Drop Down** is where you will choose your desired location. The **Count Entries No Older Than Drop Down** allows you to exclude counts older than 90, 180, or 360 days. You may select "All entries" to show all counts without excluding any stale count entries.

- *The default setting will be to exclude any counts older than 30 days.*

Add Storage Locations: Using your existing sheet to shelf or inventory spread sheet create each storage location:

****Enter the locations in the order you want them, the order may not be changed once created****

- Click **Add storage location** in the upper left > Type in the designated name for the storage location > click **Save** > Repeat for each storage location until all have been added.

Primary Methods for storage Location Set Ups:

- Order in which you would walk the store (walk in, Freezer, cooler, etc.)
 - Most users use this set up option.
- Separate Storage Locations for each Supplier (Sysco, Shamrock, Ben E. Keith, etc.)

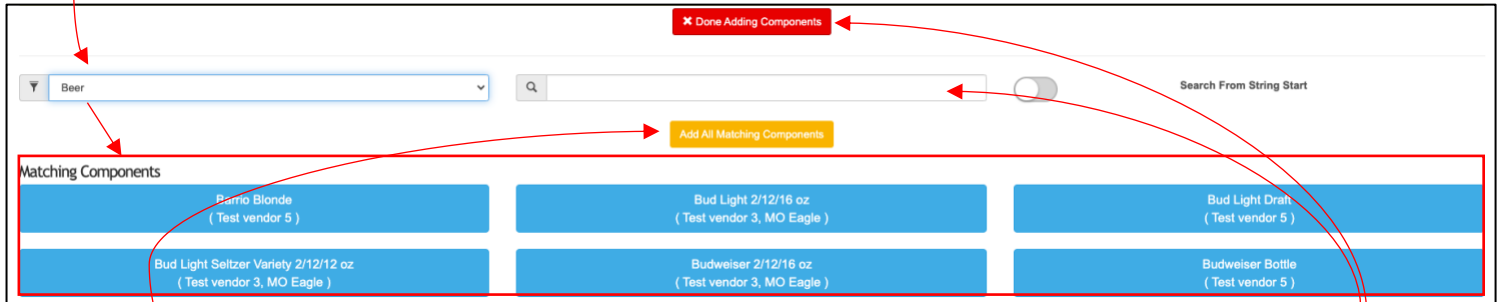
Assigning components to each storage location: We recommend using existing inventory sheets as your guide once all storage locations have been set up to add all the components to each applicable storage location in efish.

- Click the **Open Button** next to the desired Storage location to assign components to it for counting





- Click the **Add Components button**
- Select a Category in the **drop-down**. All inventory items in the system assigned to that category will populate.



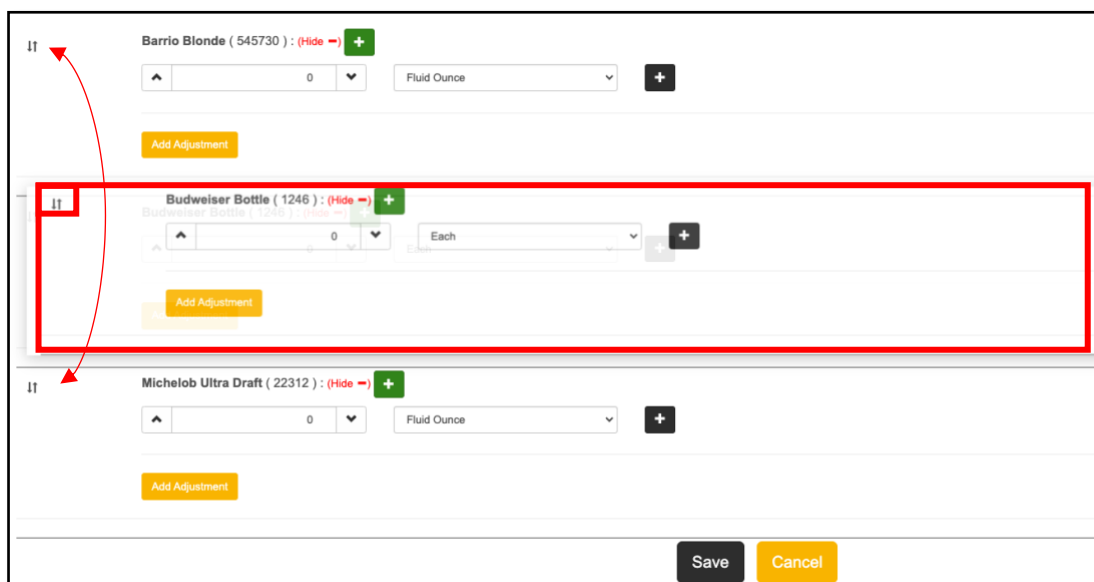
- Click on all the items in that category which go in this storage location.
 - If every Item that appears in blue goes into that storage location, you can simply click the **Add All Matching Components** button. This will add all the items that appeared in blue to that storage location.

OR

- Type in the name of the specific component(s) you wish to add in the **search bar** and add them each individually.
- Once All items have been added click the **Done Adding Components Button**

you may have the same item in different storage locations (they will all be totaled into one count on your inventory reports based on the conversions set for that item

Sorting components within each Storage Location: once all components from all categories have been added you may sort the components within each Storage Location by clicking and dragging the **Sort Icon** on the left of each component to move it to the desired position in the list.





Setting Additional Count Unit drop downs for how each component is counted: each component in the storage location will have 1 count unit by default. The default count unit for each item is the Base Unit set for that component.

- You can change the default count by unit in the **[unit drop down]** (CS, Pound, slice, Ounce, etc.) for each component. The **[unit drop down]** will show selection options for the Base unit, Price Unit, and any Universal or Item specific Custom conversion that have been set up for that item. Select the unit you wish to count by.

The screenshot shows the 'Budweiser Bottle (1246)' item page. It features a unit dropdown menu currently set to 'Each'. A dropdown menu is open, showing options: 'Box (Universal)', 'Case (Test vendor 5)', 'Case (Universal)', 'Ounce (Universal)', 'Oz (Universal)', and 'Pound (Universal)'. A red arrow points to the dropdown menu, and another red arrow points to the 'Black Plus Button' (a black square with a white plus sign) located to the right of the unit dropdown. A green plus button is also visible at the top right of the item card.

- If an item is counted multiple ways, click the **[Black Plus Button]** to add an additional Count Unit Line and select the additional count unit you wish to count that item by from the unit list.
 - If the unit DOES NOT already exist in the drop down, you can create a custom unit conversion for that item by clicking the **[Green Plus Button]** and filling out the “Add Unit/Custom Conversion Modal.”
 - Don't forget to click **[Save]**!

The screenshot shows the 'Add Unit / Conversion for Michelob Ultra Draft' modal form. It contains the following fields and options:

- 'What is the name of the NEW CUSTOM UNIT?' with the value 'New Unit'.
- 'What is the Unit Code for the NEW CUSTOM UNIT?' with the value 'new unit'. Below this field is a note: '(use the Unit code in this middle column here applicable) i.e. use "cs" for case'.
- 'Is the NEW CUSTOM UNIT Larger than 1 Base Unit?' with radio buttons for 'Yes' (selected) and 'No'.
- 'How many New Units are in 1 Base Unit?' with the value '2'.
- A summary line: '1 Base Unit = 2 New Unit(s)' with a refresh icon.
- 'Cancel' and 'Save' buttons at the bottom right.

- This will add the “New Unit” to the Count Unit list for that item which you can now add for that item in the storage location by clicking the **[Black Plus Button]** to add an additional Count Unit Line and selecting the “New Unit” from the unit list.
- Click **[Save]** at the bottom of the page when each item in the storage location is set up with all applicable count by units.



Taking Inventory: Once all your storage locations have been set up and all components have been added along with their respective count by units, you are ready to start taking inventory in efish. You can take your inventory directly from the Inventory Taker Page in efish by opening it on a tablet or phone. or you may use your existing sheet to shelf method and enter the counts into efish from the physical sheet afterwards.

How inventory is counted is critical. efish assumes any counts entered were taken at the end of the day selected (if you take it first thing in the Morning you may want to select the Previous date to enter your counts), make sure quantity entered matches the unit in the [drop down] (case, lb, etc.) Make sure that you enter your counts under the correct date if you are using a previous count from a spreadsheet.

- Make sure the date listed at the top of the page is the date you wish to enter your count.
- Click **[Open]** next to the storage location you wish to count first.
- Go down the list of Items and enter your counts for each item with their respective count units.
- If you need to make any adjustments for an item, click the **[Add Adjustment]** button under that component.
 - This will prompt a pop up where you will enter the Adjustment Type, Unit, Adjustment Amount, and Reason for the adjustment, click **[Save]** when done.

The screenshot shows the efish inventory management interface. A modal window titled "Inventory Adjustment for Budweiser Bottle" is open, allowing for adjustments to a specific item. The modal contains the following fields:

- Adjustment Type:** Loss (Reduction)
- Unit:** Each
- Adjustment Amount:** -4
- Reason:** Jimmy Dropped 4 bottles by accident

At the bottom of the modal are "Close" and "Save" buttons. A red box highlights the "Save" button. In the background, the main inventory list is visible, showing items like "Barrio Blonde" and "Budweiser Bottle". A red arrow points from the "Add Adjustment" button for "Budweiser Bottle" to the modal. Below the modal, a table displays the resulting adjustment:

Adjustment Type	Reason
x-4 Each Loss	Jimmy Dropped 4 bottles by accident



- Once you are done entering counts for each item in the storage location click the **[Save]** button at the bottom of the screen.

Michelob Ultra Draft (22312) : (Hide =>) +

^ 0.25 v Fluid Ounce +

Add Adjustment

Save Cancel

- Repeat the steps above for all storage locations until each item has been counted.

Adding Prep Item Production Counts: The **[Prep Item Production]** button is used to enter items that are made internally and then used in other recipes.

- *For example, if a store makes their own sauce and then uses the sauce in another pasta recipe. The entries for all Prep Items will be entered by first choosing your location and then clicking on the **[Prep Item Production Button]**. Enter the amounts made and any notes and then click **[Save]***
 - **Prep Item Production is only used to enter items as they are made** – to take inventory counts for prep items, you would do that in the specified storage location which each item resides just like any other item.
 - **Creating Prep Items:** To create a prep item in the Recipe Section see the [Recipe How To](#).

< 08/19/2023 >

Defined Alpha

Save Cancel

BPN sauce

Gallon ^ 0 v Note +

+ Add More Entries

****To ensure accuracy across efish prep items MUST always be entered in the inventory taker when made, you may enter multiple entries per day with the **[+ Add More Entries]** Button – add notes to your entries to keep track of the time such as (noon, Lunch, 10pm, etc.)****



Print Count Sheet: You may also print your count sheet any time by clicking the **[Print Count Sheet]** button in the upper right corner on the Inventory Taker Page. This will allow you to print your count as formatted below:

Storage Location: test 1								
Item Description	Unit	Min	Max	Last Count	Current Count	Need to Order?	Adjustments	Notes
Barrio Blonde (545730)	fl oz	--	--	0.25				
Budweiser Bottle (1246)	EA	--	--	0.25				
Michelob Ultra Draft (22312)	fl oz	--	--	0.25				

TO REVIEW A COUNT: you may click the **[view report button]** at the bottom of the Inventory Taker for any day inventory was taken.



- The report will display the previous count, number purchased, any transfers, it will give you any alert when something needs to be adjusted and allow you to enter the adjustment within the report. It also displays the current count, and pending delivery, and the Reorder threshold – if needed to reorder based on the threshold the box would automatically be checked.

Pending Orders 3 (show)

Report

Component	Previous Count	Purchased	Sales	Internal Transfer	Adjustments	Current Count	Pending Delivery	Reorder Threshold
Barrio Blonde (545730)	Never Counted Before	0	0			Fluid Ounce x0.25	0	<input type="checkbox"/>
Needs to be adjusted:								
0.25						Initial Stock (Increase)	Reason	
Budweiser Bottle (1246)	Never Counted Before	0	0		Total: -4.00	Each x0.25	0	<input type="checkbox"/>
-4.00 Each						Loss	Jimmy Dropped 4 bottles by accident	
Needs to be adjusted:								
4.25						Initial Stock (Increase)	Reason	
Michelob Ultra Draft (22312)	Never Counted Before	0	0			Fluid Ounce x0.25	0	<input type="checkbox"/>
Needs to be adjusted:								
0.25						Initial Stock (Increase)	Reason	

[Back](#) [Create PO For Selected Items](#)

- After you view the report of items entered you may Create a PO for selected Items.
 - Note: When you view report and generate PO it will only be for counted items.*