



## Inventory Taker

The Inventory taker allows you complete control and customization of your storage locations and allows users to take inventory directly from a 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 90 days.

**Prep Item Creation:** The blue **[Prep Item Creation]** button is used to count 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 counts for all Prep Items will be entered by first choosing your location and then clicking on the **[Prep Item Button]**. Enter your counts and any notes and then click **[Save]**

- **Creating Prep Items:** To actually create prep items see the [Recipe How To](#).

**Add Storage Locations:** Create your desired storage locations within the inventory taker.

### Popular Storage Location Set Ups:

- Order in which you would walk the store
- Separate Storage Locations for each Supplier (can use this as a way to create a PO)
- 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.

**Assigning Items to the storage location:** We recommend using existing inventory sheets as your guide once all storage locations have been set up.

- Click the Blue **[Edit Button]** next to the desired Storage location to assign items
- Click the Blue **[Add Components button]**
- Select a Category in the first **[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 orange **[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 item you wish to add in the second **[drop-down]**
- Sorting Items Within Each Storage Location:** once all items from all categories have been added you may sort the items by clicking and dragging the **[Sort Icon]** on the left of the item.

The screenshot shows a user interface for adding items. At the top, it says "BREAD FLAT THIN OVEN FIRED (6105298) : (Remove -)". Below this, there is a sort icon (two vertical bars) on the left, a dropdown menu in the center, and a plus icon on the right. The dropdown menu is currently set to "CS (SYSCO)".

**Set how the item is counted:** In the right **[drop down]** select the counting unit (CS, Pound, slice, Ounce, etc.) for each item.

- If an item is counted multiple ways you may click the blue **[Plus Icon]** to add an additional counting unit.

Click **[Save]** at the bottom of the page when done!

**Entering Beginning Inventory's:** Once all your storage locations have been set up and all items have been added, you are ready to start taking inventory in efish. You can take your inventory directly from the Inventory Taker page in efish, open it on a tablet or phone if you wish or you may use your existing sheet to shelf method and then enter the counts into efish, Make sure that you enter your counts under the correct date if you are using a previous count from a spreadsheet.

- Click **[Edit]** next to the storage location you wish to count first.
- Make sure the date listed at the top of the page is the date you wish to enter your count.
- Go down the list of Items and start entering your counts for each item.
- If you need to make any adjustments for an item click the orange **[Add Adjustment]** button. This will prompt a pop up where you will enter the Adjustment Type, Unit, Adjustment Amount, and Reason for the adjustment, then click **[Save]**
- Once you are done entering counts for each item in the storage location click the blue **[Save]** button at the bottom of the screen.
- Do this for all storage locations until each item has been counted.

**Print Count Sheet:** You can 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: Demo

<u>Item Description</u>	<u>Unit</u>	<u>Last Count</u>	<u>Min</u>	<u>Max</u>	<u>Need</u>	<u>Adj</u>	<u>Notes</u>
BEEF GRND BULK 81/19 CHUB FRS (566838)	CS	2000.00	120	450			
LETTUCE ROMAINE CHOPPED FRESH (2189819)	CS	600.00	3	10			
BUN HAMBURGER MLTIGRAIN 4.5 (6538185)	CS	3599.97	150	400			