

PREFACE

In this module, you will learn:

• How to take inventory (raw ingredients/goods) to Console

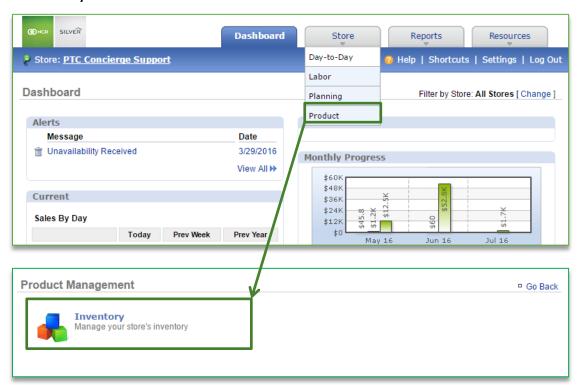
TAKING INVENTORY

Take Inventory means taking inventory of what you have *on hand* the day you typically take inventory (*which may include recent deliveries*).

It can also be used to establish a starting inventory. If you are establishing your initial inventory for products you already have on hand, you must perform a "**Take**" to set your starting quantities. This will allow you to tell the system what you have on hand without skewing reporting costs.

Note: If you are a new business with **NO** starting quantities, you will need to instead perform an "**Add Inventory**" as you receive order(s).

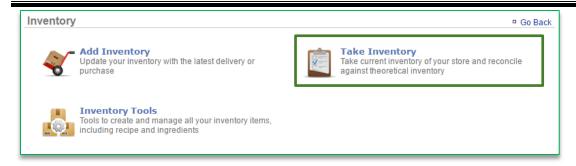
To take inventory you will need to navigate to the **Product Management** module and click **Inventory**.



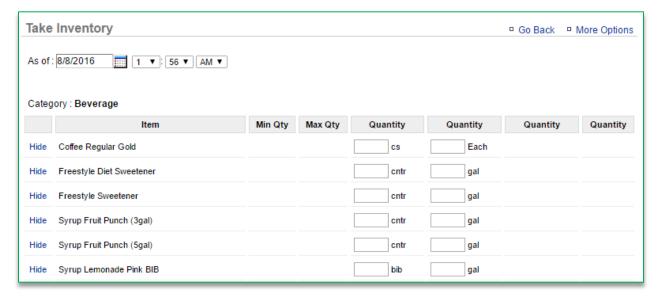
TO TAKE INVENTORY

1. Click **Take Inventory**

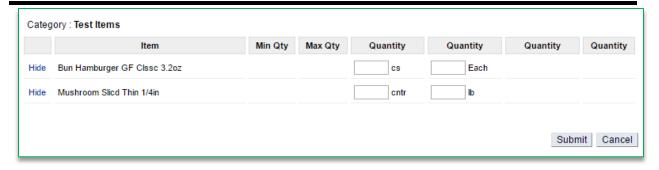




- 2. Click the calendar icon to the right of **As of** to select the date and enter the time you took inventory
 - a. It's important the date you enter reflects the date that you actually took inventory of ingredients/goods (even if it is not the date that you are entering the totals into the system)
 - b. Inventory should always be entered in the sequence of events it occurred
- 3. Enter quantity of all items received in the applicable fields
 - All units of measure that are set up for the items in your inventory will be shown so that you can take inventory off of multiple units of measure for the same item
- 4. Click Submit

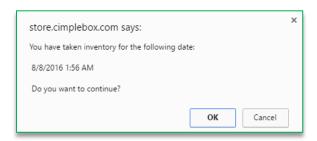






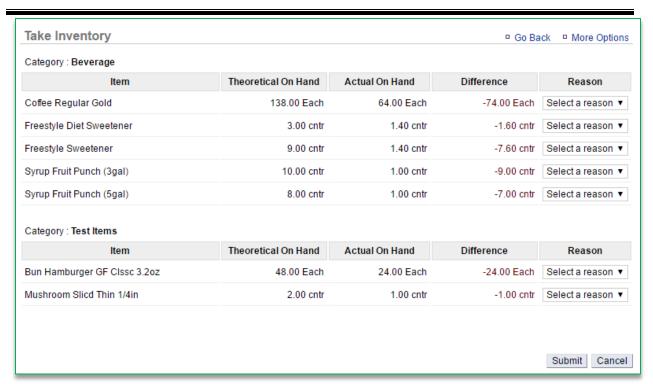
5. You will be asked to confirm your choice. Click **OK**





- 6. A summary of your take will appear
 - a. You can *select a reason* for the take of each item by clicking the dropdown menu to the right of the item (*optional*)
 - b. **Important:** If you are establishing an initial inventory, you must select "**Initial Inventory**" in the dropdown menu. This will allow you to tell the system what you have on hand without skewing reporting costs.
- 7. Click Submit





8. You will be asked to confirm your choice. Click OK

