



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**.

The screenshot shows the NCR Silver University console interface. At the top, there are navigation tabs for 'Dashboard', 'Store', 'Reports', and 'Resources'. The 'Store' tab is selected, showing a dropdown menu with options: 'Day-to-Day', 'Labor', 'Planning', and 'Product'. The 'Product' option is highlighted with a green box. Below the 'Store' tab, there is a 'Dashboard' section with 'Alerts' and 'Current' sections. The 'Alerts' section shows a message 'Unavailability Received' dated 3/29/2016. The 'Current' section shows 'Sales By Day' with buttons for 'Today', 'Prev Week', and 'Prev Year'. To the right of the 'Store' dropdown, there is a 'Monthly Progress' chart showing sales for May 16, Jun 16, and Jul 16. The chart data is as follows:

Month	Sales
May 16	\$45.8K
Jun 16	\$52.08K
Jul 16	\$1.7K


Below the 'Store' dropdown, there is a 'Product Management' section with a 'Go Back' button. The 'Product Management' section contains an 'Inventory' option with a subtext 'Manage your store's inventory', which is highlighted with a green box. A green arrow points from the 'Product' option in the 'Store' dropdown to the 'Inventory' option in the 'Product Management' section.


TO TAKE INVENTORY


1. Click **Take Inventory**



Inventory [Go Back](#)


 **Add Inventory**
Update your inventory with the latest delivery or purchase

 **Inventory Tools**
Tools to create and manage all your inventory items, including recipe and ingredients

 **Take Inventory**
Take current inventory of your store and reconcile against theoretical 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
 - a. 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**

Take Inventory [Go Back](#) [More Options](#)

As of: 

Category : Beverage

	Item	Min Qty	Max Qty	Quantity	Quantity	Quantity	Quantity
Hide	Coffee Regular Gold			<input type="text"/> cs	<input type="text"/> Each		
Hide	Freestyle Diet Sweetener			<input type="text"/> cntr	<input type="text"/> gal		
Hide	Freestyle Sweetener			<input type="text"/> cntr	<input type="text"/> gal		
Hide	Syrup Fruit Punch (3gal)			<input type="text"/> cntr	<input type="text"/> gal		
Hide	Syrup Fruit Punch (5gal)			<input type="text"/> cntr	<input type="text"/> gal		
Hide	Syrup Lemonade Pink BIB			<input type="text"/> bib	<input type="text"/> gal		



Category : Test Items

	Item	Min Qty	Max Qty	Quantity	Quantity	Quantity	Quantity
Hide	Bun Hamburger GF Clssc 3.2oz			<input type="text"/> cs	<input type="text"/> Each		
Hide	Mushroom Slicd Thin 1/4in			<input type="text"/> cntr	<input type="text"/> lb		

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

! **Important:** If you are entering inventory for the very first time, you must **ADD Inventory** for all items you have on hand. Do **NOT Take Inventory** first. Adding inventory first **STARTS** your inventory.

store.cimplebox.com says:

You have taken inventory for the following date:

8/8/2016 1:56 AM

Do you want to continue?

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**



Take Inventory Go Back More Options

Category : Beverage

Item	Theoretical On Hand	Actual On Hand	Difference	Reason
Coffee Regular Gold	138.00 Each	64.00 Each	-74.00 Each	Select a reason ▼
Freestyle Diet Sweetener	3.00 cntr	1.40 cntr	-1.60 cntr	Select a reason ▼
Freestyle Sweetener	9.00 cntr	1.40 cntr	-7.60 cntr	Select a reason ▼
Syrup Fruit Punch (3gal)	10.00 cntr	1.00 cntr	-9.00 cntr	Select a reason ▼
Syrup Fruit Punch (5gal)	8.00 cntr	1.00 cntr	-7.00 cntr	Select a reason ▼

Category : Test Items

Item	Theoretical On Hand	Actual On Hand	Difference	Reason
Bun Hamburger GF Clssc 3.2oz	48.00 Each	24.00 Each	-24.00 Each	Select a reason ▼
Mushroom Slicd Thin 1/4in	2.00 cntr	1.00 cntr	-1.00 cntr	Select a reason ▼

Submit Cancel

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

