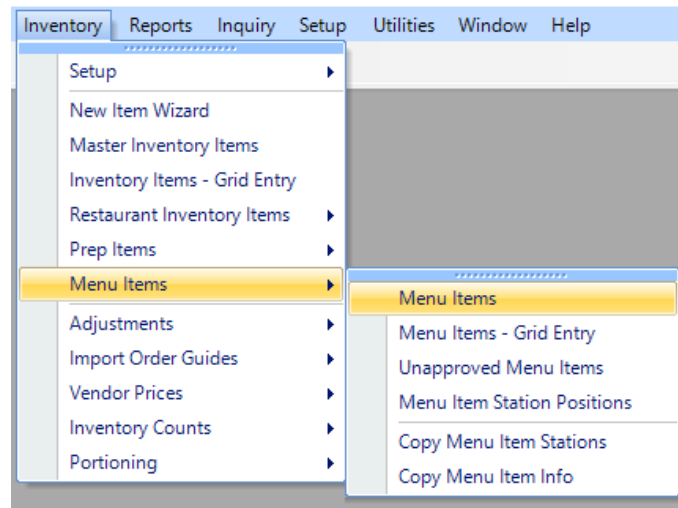


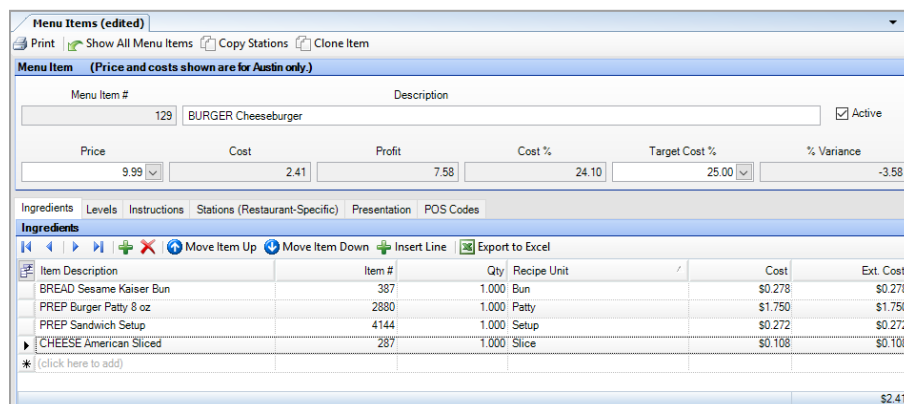
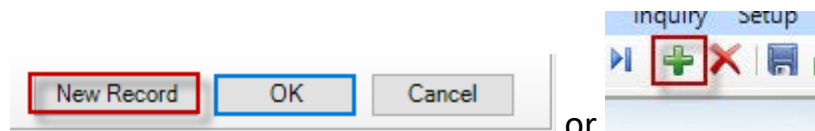
Creating Menu Items in Compeat

Menu Items in Compeat are the link to your Point of Sale (POS). They are the theoretical receipt that depletes the inventory of Inventory and Prep Items as well as offer a way to organize you Sales Mix.

To open the screen, navigate to Inventory → Menu Items → Menu Items

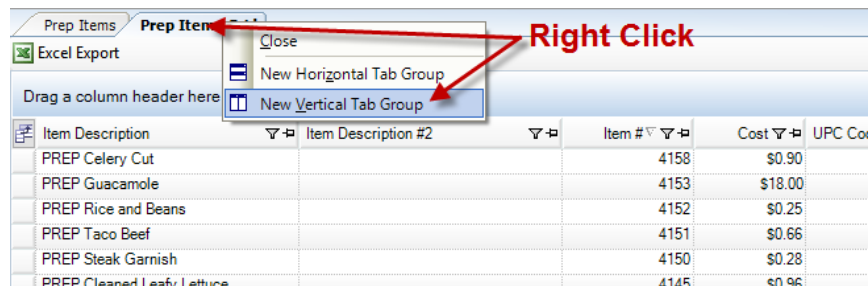
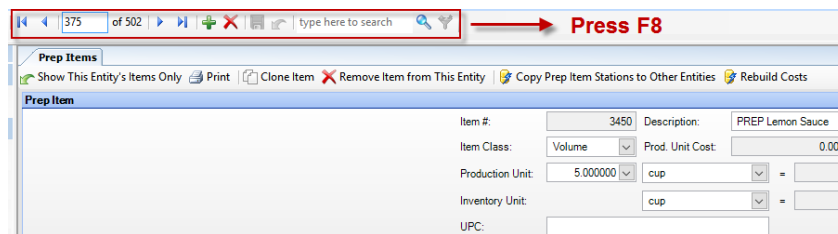


If you have created Menu Items before, you will need to select New Record at the bottom of the listing screen. Otherwise, when the screen opens it will be on a brand new item. If you are in an item already and wish to create a new item, click the Green Plus Sign at the top of the screen to start a new Menu Item.



General Notes:

- The following fields are entity specific (every other field is global)
 - Stations
 - Active Status
 - POS Code(s)
 - Price
 - Target Cost
- Anytime you're on a list of records in Compeat, press the F8 key on your keyboard at any time to bring up the grid view. You can right click on the newly created tab and select Vertical Tab View for a split screen that will allow for easier navigation.



Header – Top Line

Menu Item (Price and costs shown are for Austin only.)	
Menu Item #	Description
129	BURGER Cheeseburger <input checked="" type="checkbox"/> Active

- **Menu Item #:** As with Master Inventory Items, leave this blank and Compeat will auto-generate.
 - The Item number will be auto generated using the last Item # plus 1. If you create your own item numbers, the sequence will change and this cannot be modified.
- **Description:** It is recommended to identify items with an all caps identifier in front of the description so that they stand out in a list.
 - If you have multiple concepts with recipes that share a name, you may also want to designate the concept in the recipe name. you may want to do something like

B&G (for Bar and Grille) or MEX (for Mexican) if there are two similar recipes but they are ultimately concept specific (ie, Salsa or Ranch Dressing).

- **Active:** This is entity Specific – leave Active unchecked in entities that will not be using this item. Another setting to consider is located under Setup > Enterprise Definitions – near the bottom is a checkbox to “Activate New Menu Items Across Entities” – if you have one concept and all entities are very similar, leave this box checked, if you have different concepts and Menus are not typically shared, uncheck this box.

Header – Costing Line

Price	Cost	Profit	Cost %	Target Cost %	% Variance
9.99	2.41	7.58	24.10	25.00	-3.58

- **Price:** This field is neither polled in nor pushed out. It is a manual entry only. This would represent either the current menu price of the item or, in certain situations, a “what-if” price – for example if you wanted to run a Menu Engineering Report, you could say “what if I charged \$.25 more for a category of items to see what costing/margins would look like.
- **Cost:** This field will auto-populate with the total cost of the ingredients below. (note: regardless of valuation method, this will always be calculated based on Last Invoice of the raw ingredients).
- **Profit:** the margin of this item > Price – Cost. Playing with the price field will auto-update the cost and profit fields.
- **Cost %:** Cost divided by Price = Cost %
- **Target Cost %** - The hypothetical target cost for this item – this is used on the Menu Item Contribution Report
- **% Variance** – how far off from target the cost % is (cost % minus target cost % divided by target cost %).

Ingredients						
Item Description	Item #	Qty	Recipe Unit	Cost	Ext. Cost	
BREAD Sesame Kaiser Bun	387	1.000	Bun	\$0.278	\$0.278	
PREP Burger Patty 8 oz	2880	1.000	Patty	\$1.750	\$1.750	
PREP Sandwich Setup	4144	1.000	Setup	\$0.272	\$0.272	
CHEESE American Sliced	287	1.000	Slice	\$0.108	\$0.108	
* (click here to add)						
						\$2.41

Ingredients

The Ingredients Tab is where you will physically build the recipe for the Menu Item. These ingredients can come from Restaurant Inventory Items or Prep Items. In order to use another item as an ingredient in a Menu Item, it must be marked as “Active” on the Restaurant Information Tab in the entity where you are building the Menu Item.

- **Item Description/Item #:** Enter the items using one of these two field (the other will populate automatically when the first is selected). You can use the drop-down to

scroll through your list, or (more efficiently) begin typing the first few letters of the item's description.

- Note: this can only be done by way of Description Starts With (not Contains) – you will need to know your naming convention from other items to take full advantage of the tab and type functionality. For instance, in my example above, to actually bring up Buttermilk quickly I cannot simply start typing Buttermilk, I must type MILK Buttermilk in that exact format. The item will begin populating as you type, so typing the entire name is unnecessary, usually the first 2-6 characters will suffice.
- **Qty:** Enter the number of Recipe Units of this item that are needed to make this batch.
- **Recipe Unit:** This is a drop down list (which can be typed into as well) that displays all available Units of Measure for this item. This is based on the Item Class set at the Master Level on Inventory Items or on this screen's header info for Menu Items. Any available unit can be chosen. For instance, if you receive something by the gallon, that does not mean you have to choose gallon here, you can use cup; tsp; quart etc.). If you find that a specific unit of measure isn't available, you will either need to create a new one in Inventory → Setup → Standard Units of Measure or you may need to do a Conversion Class on the item's Master Level (such as in the Flour example outlined on the Creating New Items Doc).
- **Cost:** This is the Last Invoice cost on the unit chosen in this Entity (the tab is global, the costing is entity specific). This is always based on the last posted invoice price (if there has been no invoice received yet, it will use the hand-entered cost on the Inventory Unit of the item. If there is no cost displayed, no cost has been entered at the Restaurant Inventory Item level).
- **Ext Cost:** This will multiply the Qty by the Cost to give a total extended cost of the line item. In my example, 1 Bun is \$.278; 1 8oz. Patty is \$1.75; 1 Sandwich Setup is \$.272 and 1 Slice of Cheese is \$.108. This math happens for all items and the total for the recipe cost is at the bottom right of the screen, in my case: \$2.41.

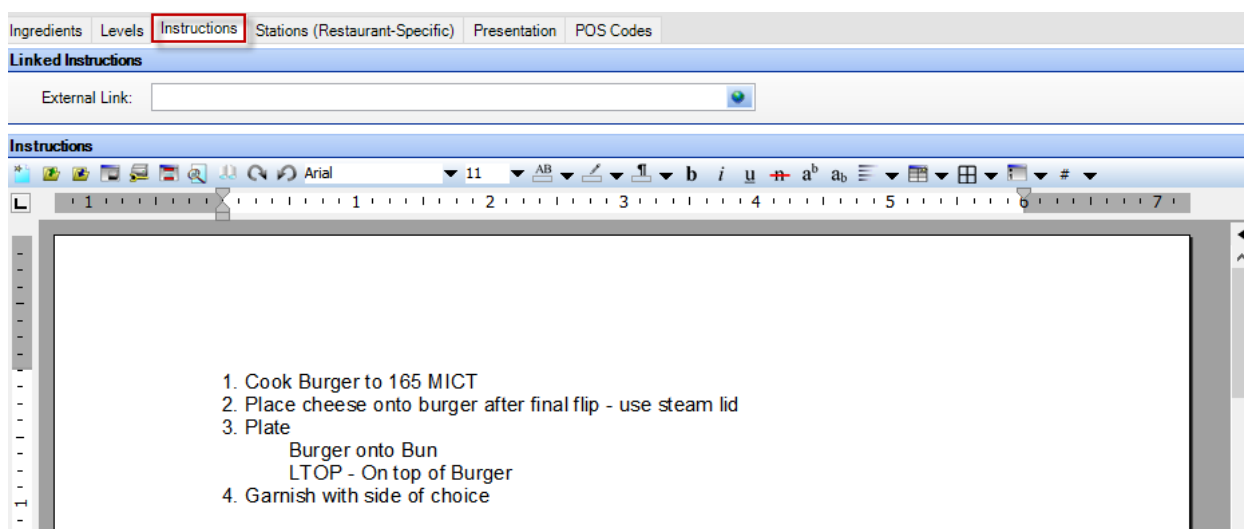
Levels

Ingredients	Levels	Instructions	Stations (Restaurant-Specific)	Presentation	POS Codes
Levels					
Level 1:	Food				
Level 2:	Sandwiches				
Level 3:					

The Levels tab allows you to set the Menu Levels for this Menu Item. These are Menu Levels, not Inventory Levels. These are established under Inventory → Setup → Menu Level (1, 2, or 3).

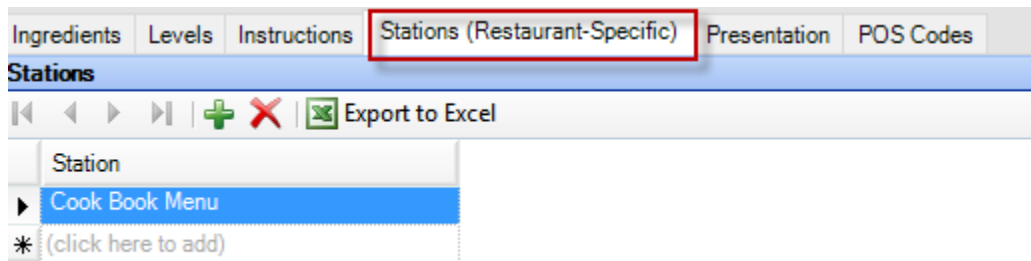
- **Level 1:** Select the broadline Menu Category that this item fits into – in my example Food.
- **Level 2:** Menu Level 2 should come from your Menu itself – the menu sections are your Level 2s – typically Entrees; Appetizers; Desserts; etc. Think of these in terms of running “apples to apples” Menu Engineering or Sales Mix Reports. Which items do you want to compare to each other.
- **Level 3:** Level 3 is rarely used on Menu Items, only if you wanted to break down your Level 2s into separate categories for reporting such as Sauces/Dressings/Wine or Beer categories (IPA; Cabernet etc.).

Instructions



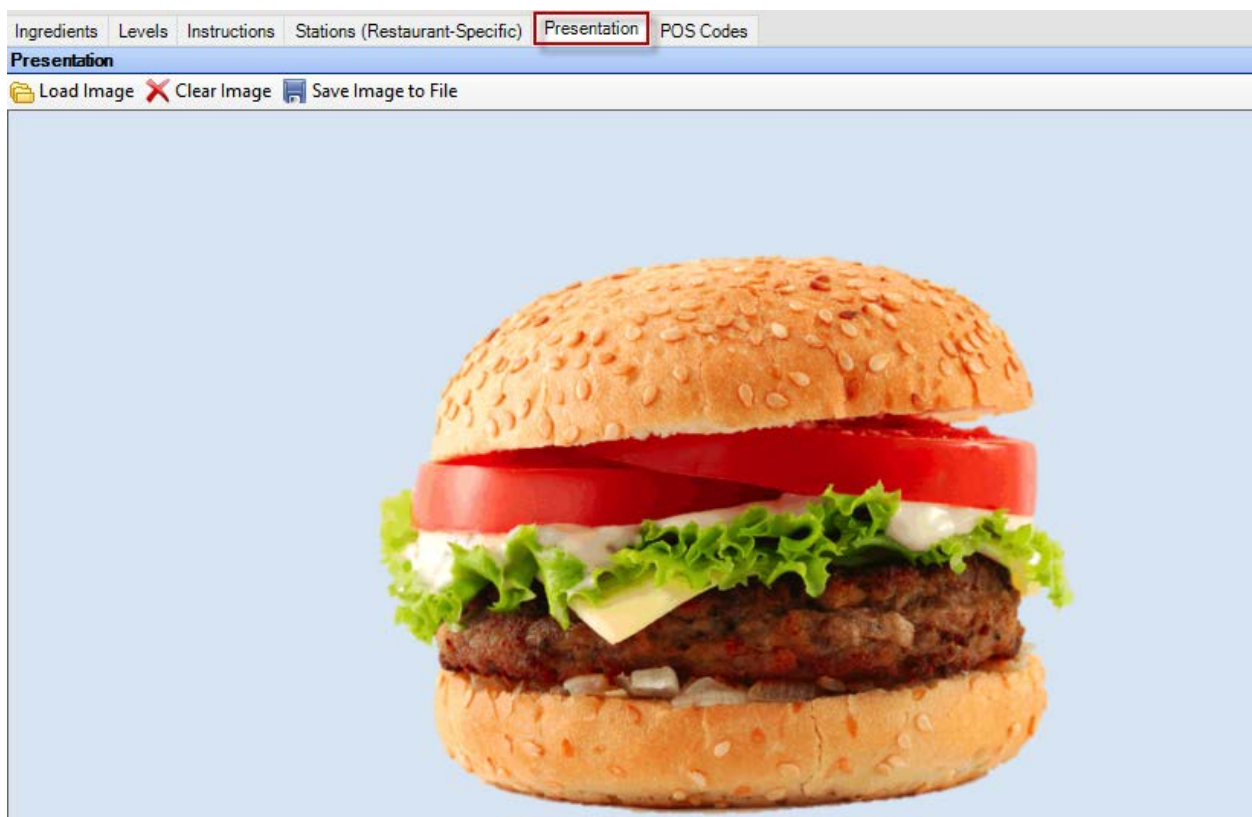
Instructions is the tab to type the free-form recipe for display in a Recipe Book. Things like Shelf Life; Tools; and different batch sizes can be entered for ease of use by the Plater. Instructions function like a common word-processor and can be copied into from another word-processing software such as Microsoft Word. You could also use the External Link feature to link to YouTube videos or online resources your company may have. It is recommended to check the formatting of anything typed or copied into this field after one or two items under Reports → Inventory Listings → Recipe Book.

Stations



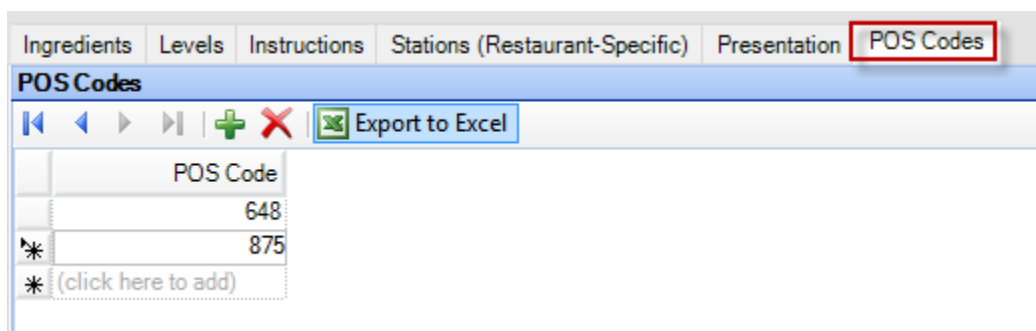
- **Station:** You can define as many stations as needed per Menu Item – Stations allow you organize your items for use in the Recipe Book. This is an optional field, but if you intend to use the Recipe Book, Stations must be set up and used. To set them up, navigate to Inventory → Setup → Stations.

Presentation



You can load in an image of your finished product to appear on the recipe book. Image size is typically limited to 50k and should be reviewed once saved on the recipe book report itself to ensure alignment/display is to your satisfaction.

POS Codes

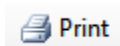


POS Codes is where you will enter the store specific POS Codes as determined by your POS Provider. Typically a report can be ran from the POS to determine which codes correspond to which items. This is the tab you will enter these codes. You can have multiple codes on one item (as in my example), however you can only have a code used exactly once. In other words, in my example, Codes 648 and 875 would not be allowed to be used on a different Menu Item in this specific Entity.

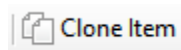
Tool Bar Buttons



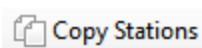
In the top left of the screen you will see one of the above buttons. The button you see means you are currently filtered to the OPOSITE set of data. For instance, if you see the button Show All Items, that means you are currently only seeing the items that have been brought into this Entity via the Inventory Info Tab and Clicking here to add to this entity. If you are seeing the Show this Entity's Items Only, you are seeing ALL possible Menu Items, whether set up in this entity or not.



The Print button will launch the Menu Item Listing Report for just this item, and will show all of the details associated with this Menu item on 1 – 3 pages. This can be a convenient, printable version of the Menu Recipe without utilizing the Recipe Book.



Similar to “Create a Similar Item” in the New Item Wizard, this button allows you to create an exact replica of this Menu Item (as approved or unapproved). It will insert the word CLONE on the end of the item’s description. This can allow for easy duplication of a Menu Recipe without having to retype the entire item.



This is a quick link to the Menu Item Stations Copy Utility. For more information on that tool, refer to the Copy Station Positions Tool guide.