



References

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Portioning Overview

What Is Portioning

Portioning allows for you to portion a bulk item into various resulting items. A classic example of portioning is breaking down bulk meat items into steaks. You may not get the same quantity of each type of steak cut every day and your yields will vary from portioning event to portioning event.

When Should You Use This Feature

You want to get variable yields and resulting items to calculate individual plate costs. Operators who cut different quantities of steaks and/or the steaks will have variable yields will benefit from this process. You may also use this to get exact quantities of items out of cases with variable quantities. For example, you may wish to get the exact number (and therefore per item cost) of shrimp received in a case of 16/20 shrimp.

Setting up Portioning

1. Setup of items you will be purchasing from vendors
2. Generally, these items will be setup with a Weight item

The screenshot displays the 'Master Inventory Items' window. The 'Item Info' section shows Item # 15 and Description 'BEEF Tenderloin Whl'. The 'Item Class' section has 'Weight' selected in a dropdown menu, with 'Weight Oz' as the Base Unit. The 'Item Options' section includes checkboxes for 'Available', 'Catch Weight', and 'Limit Counts To Inv. Units (catch weight items only)'. The 'Unit Conversion (optional)' section shows a conversion setup: 'Conversion Class' dropdown, a quantity input, 'of' text, 'Conversion Units' dropdown, an equals sign, another quantity input, 'of' text, and 'Item Units' dropdown. The 'Inventory Levels' section shows three levels: Level 1 (Food), Level 2 (Meat), and Level 3 (empty dropdown).

3. Setup of items you will be creating from portioning events

- a. Optional conversion to "count"
- b. Optional station, schedule and shelf-life setup* (Shelf life is defined at the master level- Station assignments are made on the restaurant inventory item record- Set the schedule of days you plan to portion this item and wish to have it included in suggested totals)

*This is an optional setup for users who want suggested portioning quantities

- c. Resulting items should be the same item class as the product being broken down
- d. If you will only be obtaining these items through portioning you can put the name prefix "PORT" or "PTN" in front of the item name. This will help distinguish these items from products you purchase

Master Inventory Items | Master Inventory Items Grid | **Restaurant Inventory Items** | Restaurant Inventory I

Show This Entity's Items Only | Print | Copy Portioning Stations to Other Entities

Master Information

Item #: 112 | Description: PORT BEEF Steak Filet 16oz | Desc 2:
 Level 1: Food | Level 2: Meat | Level 3:

Restaurant Information | Locations | Par Levels / Vendor Info | Bar Codes | Notes | **Portioning**

Weekly schedule for Prep-to-Shelf production

Monday Tuesday Wednesday Thursday Friday
 Saturday Sunday

Stations

Navigation: Home, Back, Forward, End, Add, Delete, Export to Excel

Station	Primary
▶ Portion	<input checked="" type="checkbox"/>
* (click here to add)	<input type="checkbox"/>

**All items must be setup as restaurant inventory items in the entities that will be using them

4. Portion Types (**Inventory > Portioning > Portion Types**) – the relationships between purchased items and resulting items

- Item to be broken down
- Minimum/Maximum yields (not used often)
- Resulting Products – List the items you will be getting out of this event in the units of measure you wish to produce

5. Employees (optional) –(**Inventory > Portioning > Portioning Employees**)

Adding employees to transactions will allow you to obtain reporting on employee performances for comparison and training. The employee list is global, but employees can be assigned to only the entities they work in

Portioning Employees

Employee

First Name: Active

Last Name:

Entities

Entity #	Entity Name
1	Austin
3	Dallas
2	San Antonio
4	Vancouver
* (click here to add)	

Brands (optional)

Tracking brands on individual transactions can help with purchasing. You can track the yields and overall output costs by vendor and make purchasing decisions.

Portioning Brands

Brand

Brand Code:

Brand Name:

City:

State:

Entering Portioning Events (Inventory>Portioning>Portioning)

1. Select a portioning type a. Optional employee/brand information may be filled out
2. **Apply Date** – The date this event took place and will affect theoretical inventory
3. **Beginning Quantity** – Amount of product you start with (usually in weight)
4. **Actual Quantity** – Total amount of product when your process is finished (this is typically the total ending weight of all items you created)
5. **QTY Produce** – Quantities of each possible output you created (how much or how many of each item did your event create)

6. **Portioned Cost**– Calculated Per inventory unit value of resulting products

7. **Post** – Transactions must be posted to update theoretical inventory and item costs

Portioning (edited)

Print Post

Portioned Item

Batch Code:	PC-001-000064	Portion Date:	10/7/2013
Portion Item:	BEEF Tenderloin Whl	Portion Item #:	15
Portioned By:	Bouza, Karen	Brand:	GRE Prime
Cost Per lb:	0.39	Portioned Cost Per lb:	0.49
Starting Qty:	10.0000 lb	Yield %:	80.00 %
Theo Used Qty:	7.7500 lb	Quality %:	103.23 %
Actual Used Qty:	8.0000 lb		

Resulting Items

Export to Excel

Qty Produce	Resulting Items	Portioned Qty	Portioned UOM
6.0000	PORT BEEF Steak Filet 16oz	1.00	Each
3.0000	PORT BEEF Steak Filet 8oz	1.00	Each
0.2500	PRT TENDERLOIN Pieces	1.00	lb

Reporting

1. Register reports – (**Inventory > Portioning > Portioning Register**) Shows the details of each transaction a. These can be looked up individually or by date range

Portion Type:	BEEF Ribeye		
Portion Date:	6/20/2013	Posted Date:	6/20/2013
Cost Per lb:	\$4.40	Portioned Cost Per lb:	\$4.72
Portioned By:	Eric Hutchinson		
Brand:	Green Acre Ranch		
Starting Qty:	10.3000 lb	Yield:	93.2039%
Theo Used Qty:	10.7500 lb	Quality:	89.3023%
Ending Qty:	9.6000 lb		

Qty Produced	Resulting Item	Portioned Qty	Portioned UOM
8.00	PORTION Steak 10oz	1.00	Each
10.00	PORTION Steak 8oz	1.00	Each
2.00	PORTION Steak 6oz	1.00	Each

2. Detailed reporting and Exports (Inventory > Portioning > Portioned Items)

You can view reporting by portion type/date/employee/brand or export this data directly to Microsoft Excel. The export to Excel includes storable column data as well as a built in Pivot Table for complex data analysis.

Portioned Items

Print Preview Setup **Portioning Pivot Table**

Report Options

Entities
 Entity #: 1 State: Area:

Date Range
 From: To:

Initial View
 Expanded
 Collapsed

Group By
 Employee, Brand
 Brand, Employee

Portioning Filters
 Brand:
 Portioned By:
 Portion Type:

Misc.

1. Printing Worksheets (Inventory > Portioning > Portioning Worksheet)

Print worksheets that include all the data your team will need to provide to enter portioning events.

The reports can be laminated and hung in the portioning station to be filled out over and over

2. Inclusion in Suggested Prep

Along with Prep Items, you can obtain daily suggested portioning lists with quantities of items you should be creating (based on the shelf life of your resulting items, as defined at the master inventory level). There are three extra steps for items you wish to have suggested portioning. a. Set a shelf life at the master level for the items that will result from the portioning event b. Set a station assignment and schedule on the portioning tab of the restaurant inventory item c. Follow your normal daily suggested prep procedures (see suggested prep training materials for this daily process)

3. Voiding Transactions (Inventory > Portioning > Void Portioning)

If a transaction is entered incorrectly it can be voided and re-entered from scratch.

It is very important that the void date selected be the same as the original transaction date.

Voiding the transaction will remove the "portioned" items from inventory and undo the cost update that was made when you broke down the bulk product.

Void Portioning

Void

Portioning Batch

Batch Code: PC-001-000024 Void Date: 09/20/2013

Portioned Items

Export to Excel

Batch Code	Portioned Item	Cost Per Inv Unit	Starting Qty	Actual Used Qty
PC-001-000024	BEEF Tenderloin Whl	\$4.29	100.0000	80.0000

Was this Helpful ?

yes

no

► **Financial Reports**

Overview of Inter-Company Transactions

How to Record Inventory Items we Purchase Through Paid Outs

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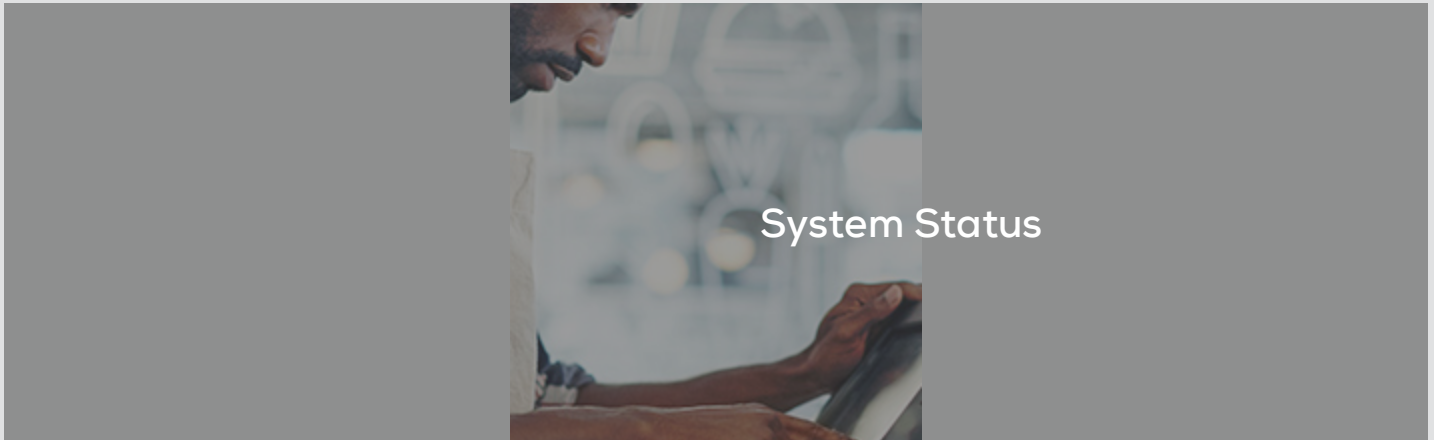
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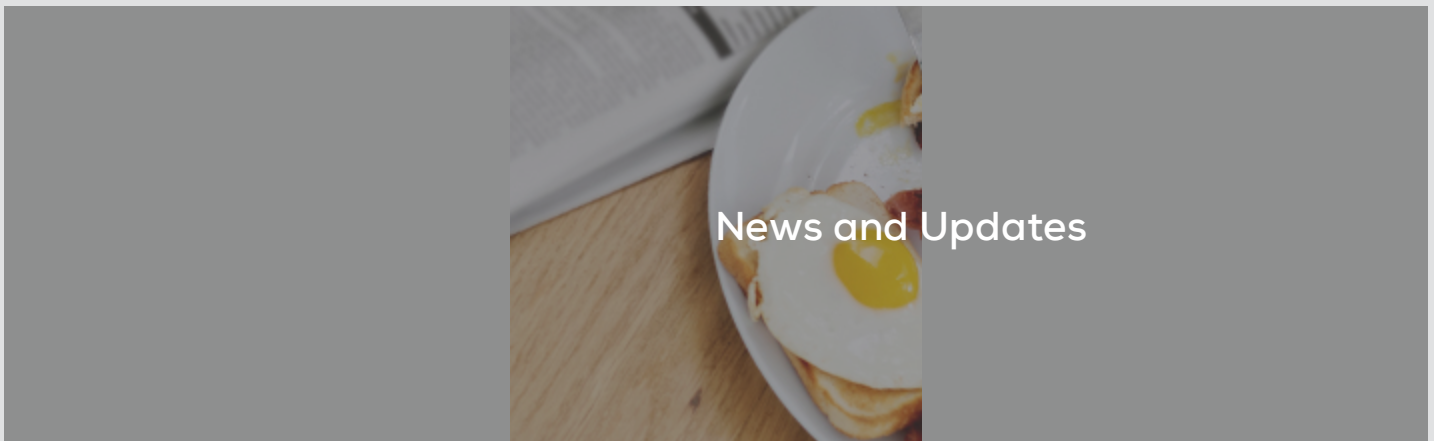
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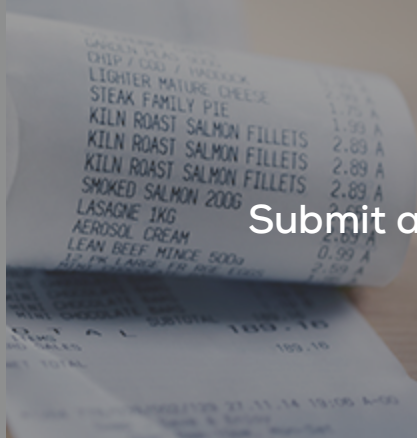


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