

# Prep-To-Shelf/Portioning

## PREP TO SHELF

Compeat Advantage provides the ability to suggest daily prep by calculating the quantities of each recipe you need based on your average usages and recipe shelf life. This tool is useful for users who have fully implemented their actual and theoretical inventory systems. The primary advantage to using this system is to provide tighter control of on-hand prep inventory, prevent waste, and reduce labor costs by prepping to a recipe's full shelf life.

### Setting up Prep-to-Shelf

Using this feature requires that Prep and Menu Items are setup and your salesmix is being polled from your POS system.

### Setting up Prep Items

- [Shelf life](#) – Number of days the product should be prepped for (whole days from 1-7) these will be used to calculate how much product to make (enough to last for the shelf life listed)
- [Station](#) – Recipe books that will include this item – the primary station is the list that will include the quantities to make each day. A station must be assigned for the item to be included in daily suggested prep and on the Recipe Book.
- [\\*Produced](#) – If you will be logging production of the item to track the prep items on variance reports this should be checked  
\*it is not recommended that this box be checked for new users
- [Location](#) – Locations that you will keep the product for counting both daily and during inventory counts

Prep Items

Print Clone Item Remove Item from This Entity Copy Prep Item Stations to Other Entities Rebuild Costs

Prep Item

Item #:	1191	Description:	PREP Balsamic Aioli	<input checked="" type="checkbox"/> Active
Item Class:	Volume	Prod. Unit Cost:	\$34.238	Estimated Product Labor (minutes): 30
Production Unit:	8.000000	quart	= 256.000000	Volume Oz
Inventory Unit:		quart	= 32.000000	Volume Oz

Shelf Life: 3

Ingredients Levels Instructions Stations Inventory Info Purchase

Stations

Export to Excel

Station	Primary?
Prep	<input checked="" type="checkbox"/>
Prep 2	<input type="checkbox"/>
Prep 3	<input type="checkbox"/>
* (click here to add)	<input type="checkbox"/>

# Prep-To-Shelf/Portioning

Ingredients Levels Instructions Stations Inventory Info Purchase Units Schedule Vendor Info/Par Levels Bar Codes

**Inventory Information**

Inventoried     Order Counts     Hot Item  
 Produced     Supplied by Commissary

Inv. Unit Cost: \$4.279770  
 Last Cost Update: 7/30/2012  
 Inventory Unit Yield: 100 % of quart  
 Theo Qty On Hand: -15.0000 quart

**Locations**

Location  
 Walk-in  
 \*(click here to add)

## Scheduling Your Prep Items (Inventory > Prep Items > Prep-to-Shelf Production Schedule)

This is where you can turn items on/off for counting and prep for specific days of the week.

Example – If a product has a 4-day shelf life, you may not count it every day. It would not be included on your daily count sheets or your suggested prep lists for that day of the week.

You can schedule both prep and portioned items using this tool

**Prep-to-Shelf Production Schedule**

Save Changes     Mark     Unmark

Type: Portioned Items  
 Level 1:    Level 2:    Level 3:

Export to Excel

Item #	Item Description	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
68	CHICKEN Wings Portioned	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
2155	PORTION Steak 10oz	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
2157	PORTION Steak 6oz	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
2156	PORTION Steak 8oz	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
112	PRT BEEF Steak Filet 16oz	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
111	PRT BEEF Steak Filet 8oz	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
2061	PRT Salmon 4oz	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
2060	PRT Salmon 8oz	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
2006	PRT TENDERLOIN Pieces	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

# Prep-To-Shelf/Portioning

## Counting Your On Hand Amounts (Inventory > Prep Items > Prep-to-Shelf Worksheet)

Part of your daily prep process should include a count of your current on hand amounts for recipes scheduled to be prepped on that day.

The first step in our process is to print of a worksheet to use when counting our on hand amounts.

*Show Scheduled Items Only* applies the schedule you setup.

When printing count sheets DO NOT include count.

Include Prep/Portioned items if you are counting those types of products for your daily prep.

Production date should reflect todays date.

Leave your location filter blank to print count sheets for all areas of your restaurant.

Rounding is not applicable to the sheets at this time.

Your Count sheets will be organized in the same sequence that your inventory count worksheets are sequenced.

Prep Item Desc	Shelf Life	Previous Monday Salesmix				Inv Units	Avg Usage Monday	Avg Usage Shelf Life	Qty - On Hand	Inv Qty = To Produce	Prod Qty To Produce	Prod Units
		1st	2nd	3rd	4th							
PREP Garlic Peeled	7	0.55	0.52	0.55	0.37 lb	0.50	1.46				4 lb	

Shelf Life – The shelf life listed on the prep recipe will be used in calculating the ‘avg usage shelf life’.

Previous Salesmix – Quantities used from salesmix during last 4 weeks on this day (using inventory units).

Inv Units - Unit of measure to be used for counting.

Qty On Hand – Quantity of inventory units on hand.

## Enter Your On Hand Amounts (Inventory > Prep Items > Prep -to-Shelf Counts)

Entering your on hand amounts will allow you to print worksheets for your prep team out of Compeat.

# Prep-To-Shelf/Portioning

Location	Shelf	Prep Item #	Description	Qty on Hand	Inventory Units
Bar Cooler	7	95	PREP Garlic Peeled	1.00	lb
Bar Line	3	2034	PREP Cole Slaw Spicy	2.00	lb
Bar Line	3	2004	PREP Cole Slaw	5.50	lb
Dry Storage	7	108	PREP Seasoned Salt	1.25	lb
Freezer	3	2004	PREP Cole Slaw	1.75	lb
Freezer	3	2034	PREP Cole Slaw Spicy	3.00	lb
Freezer	4	177	PREP BBQ Smokey	3.00	cup
Produce Cooler	2	6	PREP Pico De Gallo	3.00	lb
Walk in 2	4	96	PREP Mashed Potatos	3.00	lb
Walk in 2	4	2058	PREP Mashed Potatos BP	3.00	lb
Walk in 2	3	2061	PRT Salmon 4oz	1.00	Each

The entry of your on hand counts will be in the same sequence as your prep count sheets. Make sure to enter your counts for all items to generate a suggested prep sheet.

\*Save your changes but DO NOT post your counts at this time.

## Creating Prep Sheets For Your Team (Inventory > Prep Items > Prep-to-Shelf Worksheet)

You will reprint your worksheet with the suggested numbers that were calculated from your on hand counts.

*Use Prep-to-Shelf Counts* should now be checked.

Notice that selecting the *Use Prep-to-Shelf Counts* option changes the sorting from "Location" to "Station".

All Prep Items must have a station in order to print on a suggested sheet.

It is recommended that your suggested prep values be rounded to the nearest half batch size.

# Prep-To-Shelf/Portioning

Prep Item Desc	Shelf Life	Previous Monday Salesmix				Inv Units	Avg Usage Monday	Avg Usage Shelf Life	Qty - On Hand	Inv Qty = To Produce	Prod Qty = To Produce	Prod Units
		1st	2nd	3rd	4th							
PREP Garlic Peeled	7	0.55	0.52	0.55	0.37 lb	0.50	1.46	0.00	1.50	0.50	4 lb	

30 total records  
 \* = item is not scheduled but is an ingredient in a prep item that is scheduled for this production date.

The reprinted worksheet now contains suggested quantities to prep. The suggestion will list the quantity of inventory units needed and the number of batches (prod units) to create to achieve the required amount (this is where the rounding is applied).

In the Example above, the suggestion is to create 1.5 lbs. of PREP Garlic Peeled, or .5 batches (the batch size is 4lb per batch).

\*\*\*If the Prep Item's inventory and production values are identical on the prep recipe then no 'Prod Unit' will be displayed. The quantity of inventory units will be the only amount displayed.\*\*\*

These sheets will be organized by 'Station' and can be given to your team to guide their prep.

## Posting Counts (Inventory > Prep Items > Prep-to-Shelf Counts)

When you have completed your prep, you can post your original count to clear this out for the following day.

To clear out your count screen return to the Prep-to-Shelf Counts screen.

Now you can post your counts. If any of your items are marked as "produced" then you will be taken to the *Produce Prep Items* screen and the suggested amounts to create will be automatically filled in for you.

This is the screen you will use to enter exact quantities created for "produced" prep items and affect the yield on individual production events.

## Logging the Productions of "Produced Items" (Inventory > Prep Items > Produce Prep Items)

For any recipe that is marked as "produced" on the inventory section of the prep recipe, you MUST log the exact quantities that you created on a daily basis.

To have Compeat give you a suggestion of how much you should have made for each item you can post your prep-to-shelf counts.

Location	Shelf	Prep Item #	Description	Qty on Hand	Inventory Units
Bar Cooler	7	95	PREP Garlic Peeled	1.00	lb
Bar Line	3			2.00	lb
Bar Line	3			5.50	lb
Dry Storage	7			1.25	lb
Freezer	3			1.75	lb
Freezer	3			3.00	lb
Freezer	4			3.00	cup
Produce Cooler	2			3.00	lb
Walk in 2	4			3.00	lb
Walk in 2	4	2058	PREP Mashed Potatos BP	3.00	lb
Walk in 2	3	2061	PRT Salmon 4oz	1.00	Each

Post to Produce Prep Items

Production Date: 02/01/2013

OK Cancel

Make sure to post these counts with the current date and your suggested prep for "produced" items will flow through to your *Produce Prep Items* screen. Posting will clear out this screen for your next count.



# Prep-To-Shelf/Portioning

\*\*\*Note: You can also access your Produce Prep Items screen directly by going to Inventory > Prep Items > Produce Prep Items if you need to edit prior to posting\*\*\*

When entering in your productions it is important that you enter the exact quantities that you created in order to have accurate theoretical inventory calculations.

Station	Shelf	Prep Item #	Description	Prod. Qty	Production Unit	Inv. Qty	Inventory Unit	Yield
Prep	1	7	PREP Brisket	3.00	13.5 lb	28.00	lb	69%
Prep	4	62	PREP BBQ Bourbon	0.65	128 Vol oz	10.40	cup	100%
Prep	2	6	PREP Pico De Gallo	6.18	15 lb	92.70	lb	100%
Prep	5	135	PREP Garlic Butter	1.83	5.5 lb	10.05	lb	100%

If you would like to adjust the inventory quantity that was produced to reflect a yield of less than 100%, you can affect the yield on this specific production.

You must post this production in order to affect your theoretical inventory for the raw ingredients and the produced prep items.

## Portioning

### 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 class

Master Inventory Items Grid

Item # 15  
Description: BEEF Tenderloin WH

Item Class: Weight  
Base Unit: Weight Oz

Item Options: Portioned Shelf Life: [ ] Available [x] Catch Weight [x] Limit Counts To Inv. Units (catch weight items only) [x]

Unit Conversion (optional): Conversion Class: [ ] # [ ] of [ ] Conversion Units [ ] # [ ] of [ ] Item Units [ ]

Inventory Levels: Level 1: Food Level 2: Meat Level 3: [ ]

# Prep-To-Shelf/Portioning

3. Setup of items you will be creating from portioning events
  - a. Optional conversion to "count"
  - b. Optional station, schedule and shelf-life setup\*
    - i. Shelf life is defined at the master level
    - ii. Station assignments are made on the restaurant inventory item record
    - iii. 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

The screenshot shows the 'Restaurant Inventory Items' window. The 'Master Information' section contains the following data:

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

The 'Portioning' tab is selected, showing a 'Weekly schedule for Prep-to-Shelf production' with checkboxes for all days of the week (Monday through Sunday) checked. Below this is a 'Stations' table:

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
  - a. Item to be broken down
  - b. Minimum/Maximum yields (not used often)
  - c. 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

# Prep-To-Shelf/Portioning

Entity #	Entity Name
1	Austin
3	Dallas
2	San Antonio
4	Vancouver

- 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.

Brand Code:	GRE
Brand Name:	GRE Prime
City:	Houston
State:	TX

## Entering Portioning Events (Inventory>Portioning>Portioning)

- Select a portioning type
  - Optional employee/brand information may be filled out
- Apply Date – The date this event took place and will affect theoretical inventory
- Beginning Quantity – Amount of product you start with (usually in weight)
- Actual Quantity – Total amount of product when your process is finished (this is typically the total ending weight of all items you created)
- QTY Produce – Quantities of each possible output you created (how much or how many of each item did your event create)
- Portioned Cost– Calculated Per inventory unit value of resulting products
- Post – Transactions must be posted to update theoretical inventory and item costs

# Prep-To-Shelf/Portioning

**Portioning (edited)**

Print Post

**Portioned Item**

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

10/7/2013 10:48 AM
Portioning Register
Page 1 of 1

Austin, Entity #1  
 Batch Code: PC-001-000050

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Portion Type: BEEF Ribeye	Posted Date: 6/20/2013
Portion Date: 6/20/2013	Portioned Cost Per lb: \$4.72
Cost Per lb: \$4.40	
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.

# Prep-To-Shelf/Portioning

The screenshot shows the 'Portioning Pivot Table' report options. The 'Entities' section has 'Entity #' set to 1. The 'Date Range' section has 'From' and 'To' fields. The 'Portioning Filters' section has 'Brand', 'Portioned By', and 'Portion Type' dropdowns. The 'Initial View' is set to 'Expanded' and 'Group By' is set to 'Employee, Brand'.

## 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.