

PREP TO SHELF

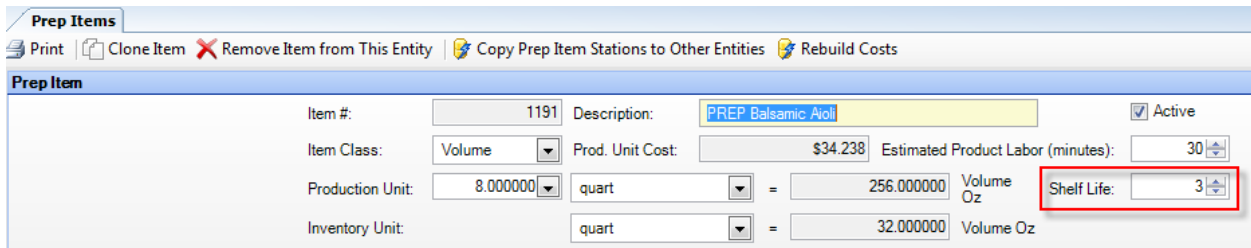
Compeat Advantage provides the ability to perform daily prep by calculating the quantities of each recipe you need based on your average usages and recipe shelf life. This tool is useful for users who have fully implemented their actual and theoretical inventory systems. The primary advantage to using 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

- a. [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)
- b. [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.
- c. [*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
- d. [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

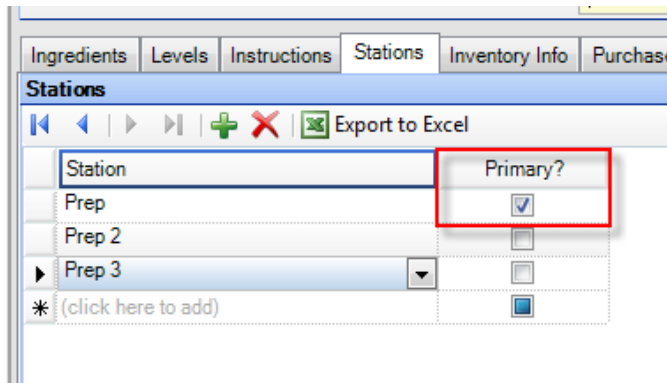
Prep Item

Item #: 1191 Description: PREP Balsamic Aioli Active

Item Class: Volume Prod. Unit Cost: \$34.238 Estimated Product Labor (minutes): 30

Production Unit: 8.000000 quart = 256.000000 Volume Oz Shelf Life: 3

Inventory Unit: quart = 32.000000 Volume Oz



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"/>

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

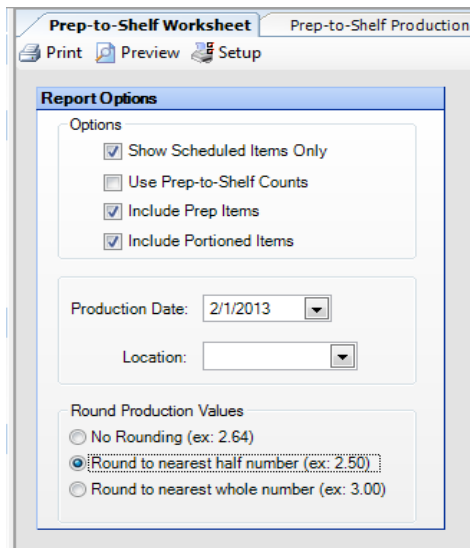
Save Changes Mark Unmark

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"/>

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



Prep-to-Shelf Worksheet | Prep-to-Shelf Production

Print Preview Setup

Report Options

Options

- Show Scheduled Items Only
- Use Prep-to-Shelf Counts
- Include Prep Items
- Include Portioned Items

Production Date: 2/1/2013

Location: [Dropdown]

Round Production Values

- No Rounding (ex: 2.64)
- Round to nearest half number (ex: 2.50)
- Round to nearest whole number (ex: 3.00)

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.

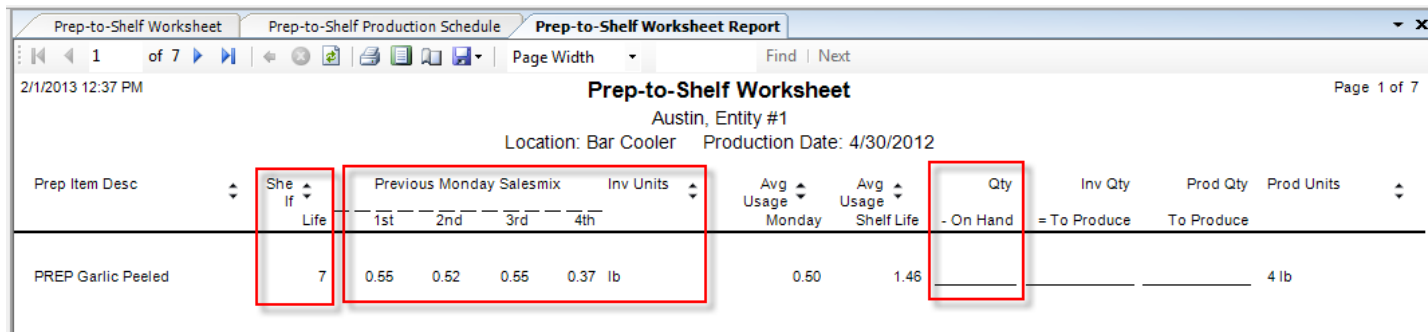
Production date should reflect todays date.

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	Prod Qty	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’.

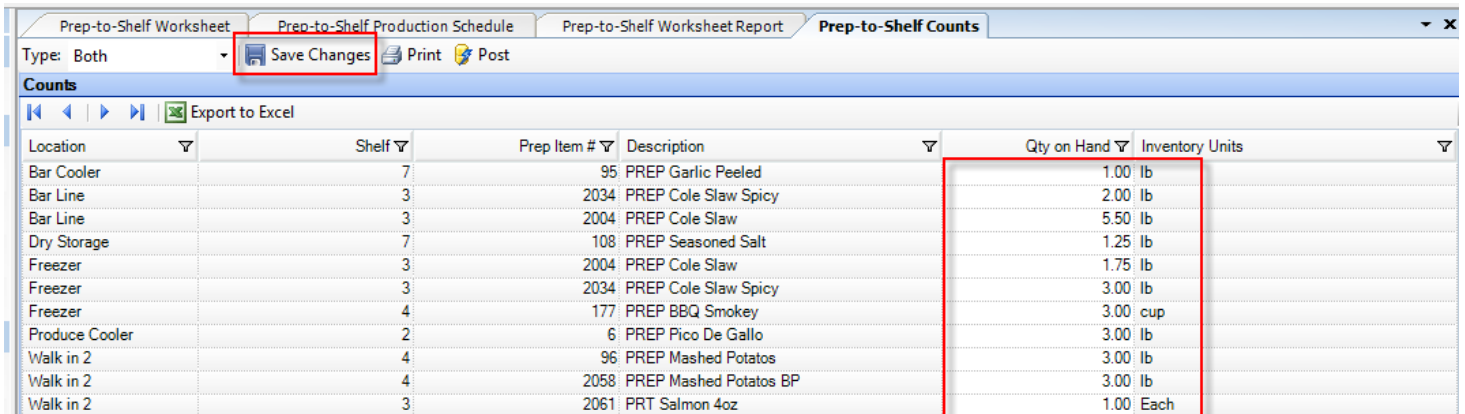
Previous Salesmix – Quantities used from salesmix during last 4 weeks on this day (using inventory units).

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.

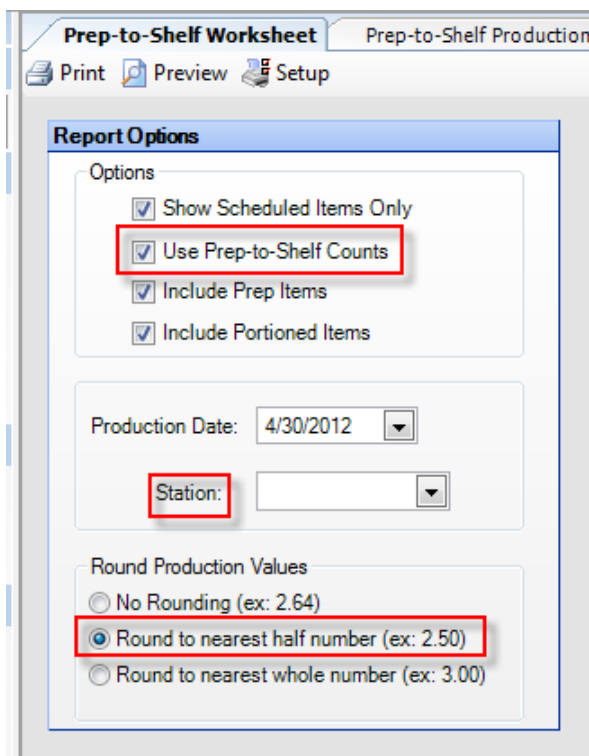


Location	Shelf	Prep Item #	Description	Qty on Hand	Inventory Units
Bar Cooler	7	95	PREP Garlic Peeled	1.00	lb
Bar Line	3	2034	PREP Cole Slaw Spicy	2.00	lb
Bar Line	3	2004	PREP Cole Slaw	5.50	lb
Dry Storage	7	108	PREP Seasoned Salt	1.25	lb
Freezer	3	2004	PREP Cole Slaw	1.75	lb
Freezer	3	2034	PREP Cole 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)



Prep-to-Shelf Worksheet Prep-to-Shelf Production

Print Preview Setup

Report Options

Options

- Show Scheduled Items Only
- Use Prep-to-Shelf Counts
- Include Prep Items
- Include Portioned Items

Production Date: 4/30/2012

Station: []

Round Production Values

- No Rounding (ex: 2.64)
- Round to nearest half number (ex: 2.50)
- Round to nearest whole number (ex: 3.00)

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 Worksheet Report												
2/1/2013 12:52 PM												
Prep-to-Shelf Worksheet												
Austin, Entity #1												
Station Prep 3 Production Date: 4/30/2012												
Prep Item Desc	Shelf Life	Previous Monday Salesmix				Inv Units	Avg Usage Monday	Avg Usage Shelf Life	Qty - On Hand	Inv Qty	Prod Qty	Prod Units
		1st	2nd	3rd	4th					= To Produce	To Produce	
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.

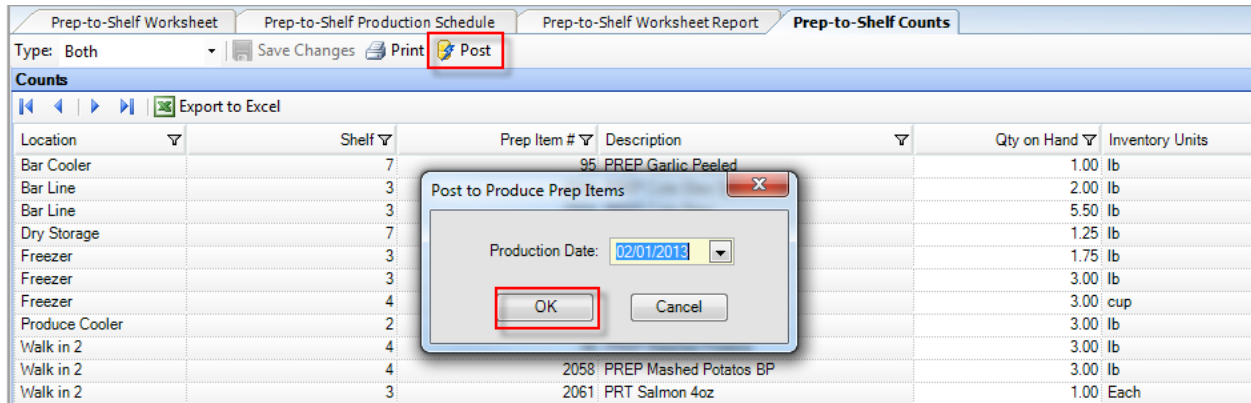
Now you can post your counts. If any of your items are marked as "produced" then you will be taken to the *Produce Prep Items* screen and the suggested amounts to create will be automatically filled in for you.

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.

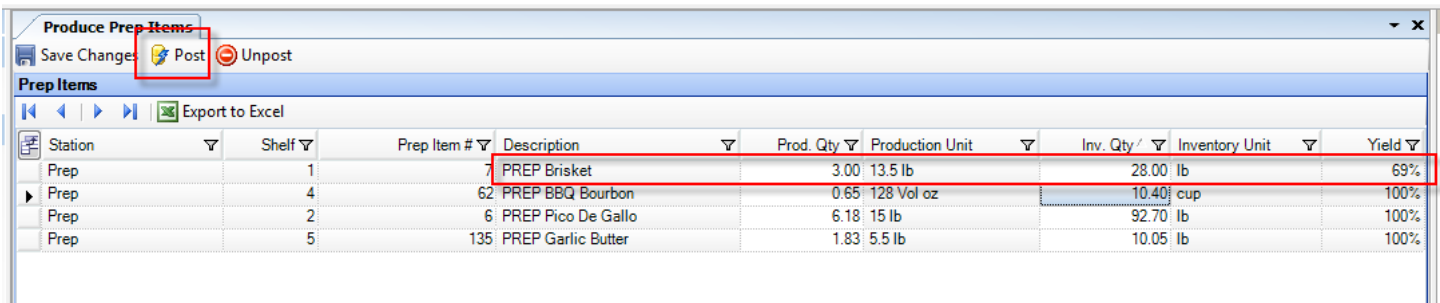
To have Compeat give you a suggestion of how much you should have made for each item you can post your prep-to-shelf counts.



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.

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.



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.