

OPERATIONS POINT OF CONTACT/USER: _____

PHASE 1 – ITEMS IN

- Vendor Items, Purchased Items, and Units of Measure imported and shown to User
- User understands and can explain Vendor Item>Purchased Item relationship
- User provides historical net sales and coach imports
- Vendor integration(s) submitted

PHASE 2 – MANAGING ITEMS

- User can create new Purchased Items, Vendor Items, and Units of Measure
- User understands the UofM Equivalencies tab on Purchased Items
- User has set all necessary vendors to invoice “By Item”
- User has mapped all missing vendor items. If “No”, how many remain? _____
- Operational Reporting Categories are set up
- Restaurant Managers setup as users in R365 with Restaurant Manager as primary role
- Coach has shown receiving report(s)**

PHASE 3 – INVENTORYING ITEMS

- One Stock Count Template exists per polling location
- User understands Stock Count Template maintenance
- User understands starting, performing, and reviewing Stock Counts
- User has taken first test counts. Date of 1st Count: _____
- User is aware of first stock count process and necessary JE's
- Coach has shown Actual vs Theoretical Analysis report to User**

PHASE 4 – RECIPE MANAGEMENT

- User understands difference between Yield, Prep, and Menu Item Recipes
- User has mapped a Recipe to a Menu Item
- Coach has provided Menu Item Category worksheet to User
- Coach has shown Menu Item Analysis reports to User**