Quick Count

Feature Description

The **Quick Count** interface provides inventory control for a revenue center without the purchase of a third-party application. With Quick Count, a manager can define recipe ingredients and costs, monitor inventory levels, and analyze menu item performance. Item Variance reports, which detail the difference between expected versus actual inventory, are also included. These reports help a manager identify excess supplies, determine when to adjust prices, or indicate problems with recipe preparation or portion control.

Quick Count is a fully integrated part of the 3700 POS System.

Interfaces USAGE

Quick Count

Usage

Quick Count's inventory process uses two key modules of the 3700 System:

- **POS Configurator**—This is where access to the inventory is granted and the database of ingredients is defined.
- **Manager Procedures**—This is where the physical inventory is added, counted, and then reconciled against projected usage as tracked by the system.

Quick Count

Using the POS Configurator

Using Manager Procedures

Using the POS Configurator

The POS Configurator is used to define the inventory items (i.e., the basic ingredients) used to prepare menu items, to establish the unit cost per ingredient, and to link these ingredients to the appropriate menu items and menu item prices sold through the POS System.

To do this, two new forms were added to the POS Configurator:

- **Item Definition**—This form is used to define the inventory item, to specify the unit of measure (i.e., the smallest increment) used for a recipe or menu item, and to attach a unit cost to that increment.

  For example, hamburger is purchased by the pound, but is sold to the customer in portions measured by the ounce (e.g., 2 oz. = kids burger, 3 oz. = regular burger, and 4 oz. = quarter pounder). In the inventory, then, the unit of measure would be one ounce, with a cost per unit calculated as 1/16 of the price of pound of hamburger. If hamburger is purchased at a price of $1.60/pound, then the unit cost would be $0.10.

- **Item Assignment**—This form establishes a link between ingredients (and their unit costs) and the menu items in which they are used. Up to 10 units of an ingredient can be added to a menu item. For example, a regular burger includes 3 oz. of hamburger. If hamburger is inventoried by the ounce, then a regular hamburger would have 3 hamburger units assigned.

  Similarly, more than one ingredient can be linked to a particular menu item. For a regular cheeseburger menu item, the ingredients might include 3 oz. (or units) of hamburger, 1 slice of cheese, and 1 roll. The cost per unit of each ingredient would be added to the total menu item cost. There are no limits to the number of ingredients that may be assigned.

  And finally, this form is used when the same menu item may be sold at more than one price. Multiple pricing is used to differentiate between revenue center (bar versus restaurant), order type (eat-in, carry out, delivery) or service period (dinner versus happy hour). Up to 10 price levels are allowed per menu item. (Refer to Menu Levels for more information on this topic.)

POS Configurator

FEATURE

Menu Levels

Feature Description

Menu Levels determine which transaction items are available when an employee presses a touchscreen key. Transaction items include menu items, discounts, service charges, and tender/media.

The system provides two stages of definition—*Main* and *Sub*—where *Main* is the primary level and *Sub* is a secondary stage beneath a *Main* menu level. Only one main and one sub menu level can be active at any time, however, every transaction item must be active on at least one of them (main and sub).

The system allows you to define up to 10 main and 10 sub menu levels.

Menu levels act as filters, allowing you to control transaction items in the following ways:

- **Availability**—Menu levels are used to determine which transaction items are accessible under certain conditions. For example, a restaurant may have separate menus for breakfast, lunch, and dinner. Breakfast items are not sold during dinner, and dinner items are not available at breakfast. When the server presses the [Entrées] key during breakfast hours, the UWS displays keys for breakfast items (pancake combo, fruit-and-cereal special) but not dinner items (spaghetti, roast duck, catch-of-the-day). Limiting the number of items displayed speeds up service (less items to scan for selection) and reduces the number of transaction errors (ordering pizza at breakfast, bagels at dinner).

- **Price**—Menu levels are used to change the value of a transaction item (e.g., the price of a menu item, the amount of a discount) when ordered during different serving periods. For example, a restaurant with a bar may have special prices for drinks when they are ordered during Happy Hour (4-6pm, Monday through Friday). When a server presses the [Rum Punch] key during Happy Hour, the system automatically charges the special price. Using menu levels in this way means that employees only need to learn one method of placing orders. The system worries about time and price.

  
  There are times when a restaurant may want to override the price change between serving periods. For example, a group of customers arrives during Happy Hour, order drinks, and decides to stay for dinner. If Happy Hour expires during dinner, the restaurant can continue to charge them Happy Hour prices by programming repeatable menu items that use the menu levels that were in effect during the previous round.

- **Size**—Menu levels are used to change the price of a transaction item based on the size ordered. For example, a restaurant offers soda in three sizes (small, medium, large), soup in two sizes (small, large),

and salads in two sizes (small, large). The price of each menu item is dependent on the size ordered. Three menu level keys are placed on the touchscreen and labeled: [Small], [Medium], and [Large]. When the server presses [Small][Soup], [Large][Salad], and [Medium][Soda], the system automatically selects the price appropriate for the size of the menu item. When you have many items at different prices, this feature helps to conserve touchscreen space as well as speed up daily operations.

Quick Count

Enabling the POS Configurator

This section provides instruction for establishing an inventory and configuring the links that will track item usage and cost. Inventory setup is done through the POS Configurator and comprises the following processes:

- Defining Inventory Items
- Linking Inventory to Menu Items
- Configuring Reports

Quick Count

Defining Inventory Items

With permissions assigned, the next step is to establish and define the items that comprise the restaurant's inventory. These are the recipe ingredients used in the menu items sold though the POS System.

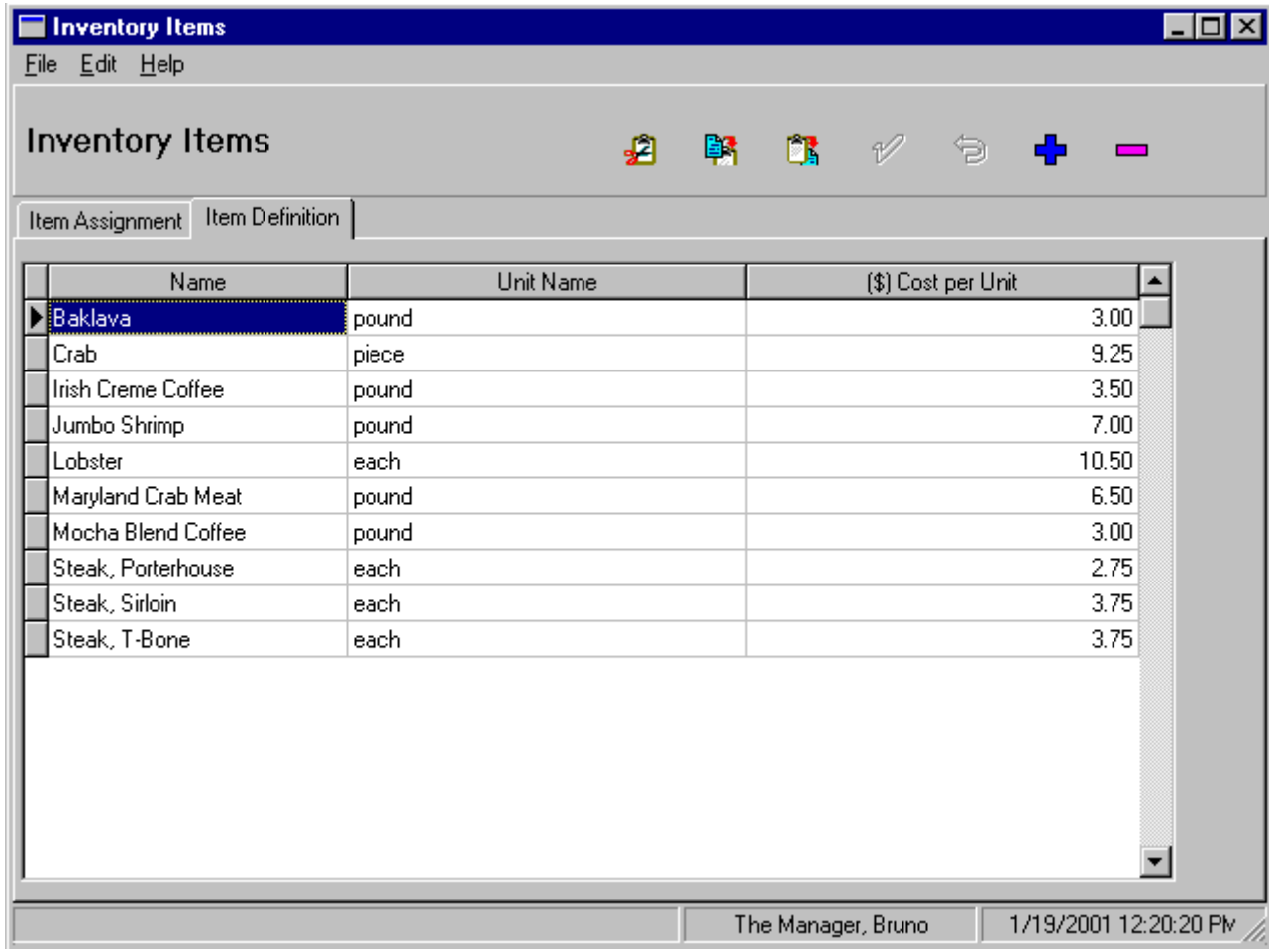
Each ingredient listed includes a standard unit of measure and a cost per unit. The unit measure is always the smallest increment by which an ingredient would be included as part of a menu item (e.g., ounces, pound, glass, each).

Because restaurants are subject to a changing marketplace, inventory items may be added, deleted, or modified at any time.

Follow these steps to define the inventory:

Step	Procedure
1	Open the POS Configurator and select **Sales | Inventory**.
2	Go to the Item Definition tab.
3	Click to add a new record. The sequence in which ingredients are entered is not critical. The system will automatically alphabetize the listing once the entry is complete.
4	Type in the **Name** of the item.
5	In the **Unit Name** column, right-click to open the drop-down list and select the appropriate unit measure for the ingredient. If the preferred unit measure is not on the list, enter it manually. Once a unit is defined for the first time, it will be automatically added to the drop-down list.
6	In the **$ Cost per Unit** column, enter the unit cost of the ingredient. This field supports up to two decimal places.

Item Definition



Quick Count

Linking Inventory to Menu Items

Once an inventory is established, the next step is to link the ingredients to the appropriate menu item offered through the POS system. This accomplishes several important functions:

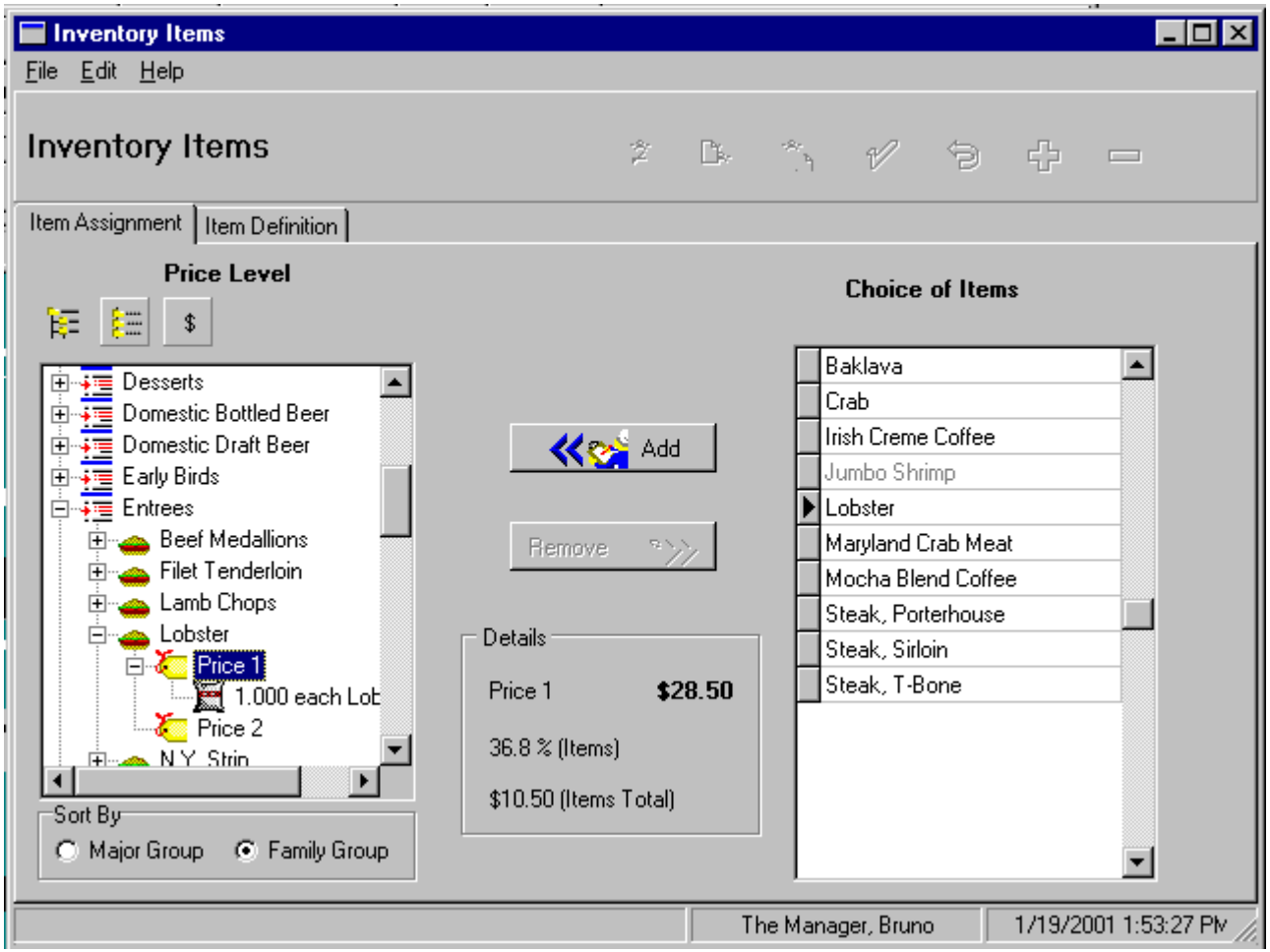
- **Costing**—The cost of each ingredient is added to the total cost of producing a menu item. Cost is one of the variables considered when setting a price for a menu item and in determining menu item profitability.
- **Price Levels**—Because each menu item can have up to 10 prices associated with it, the ingredients must be linked to each menu item price. This allows the system to compare the cost of the ingredients against a range of menu item prices. It is another method for determining menu item profitability.
- **Inventory Levels**—When a menu item is ordered, the system automatically depletes the linked ingredients from the current supply. At the end of the report period, the sum of all the depletions (as tracked by the system) determines the inventory's theoretical usage. Theoretical usage assumes that the ingredients were added consistently and that all transactions have been properly recorded. A comparison of theoretical versus actual usage may indicate problems with current procedures (e.g., inventory handling or recipe/portion control).

Follow these steps to assign the inventory items:

Step	Procedure
1	Open the POS Configurator and select **Sales | Inventory**.
2	Go to the Item Assignment tab.
3	Select an ingredient from the **Choice of Items** table on the right.
4	Using the database table on the left, select a menu item from the directory listing. Menu items may be sorted by **Major Group** or **Family Group** by checking the appropriate radio button beneath the directory.
5	With the menu item expanded, highlight the appropriate **Price** level. Depending on how the system is configured, up to 10 price levels may be listed. When a price is highlighted, the following information is displayed in the **Details** box to the right:

	• **Price**—Displays the selected level (1-10) along with the price charged for the menu item. • **% (Items)**—Indicates what percentage of the menu item price is consumed by the cost of its ingredients. • **$ (Items Total)**—Provides the total cost for all ingredients added to the menu item.  A comparison of the total cost with the selected menu item price provides a rough indicator of whether or not the menu item is profitable.
6	With the **Choice of Item** highlighted, link the ingredient to the menu item by clicking the **Add** button. This adds one unit of the ingredient to menu item price level. The **Details** box is automatically updated to reflect the change. If more than one unit of the ingredient is required (i.e., four 1-oz. units of hamburger for a quarter-pounder menu item), click the **Add** button until the correct number of units is assigned. The system will consolidate the units automatically. Up to 10 units of a single ingredient may be added to the menu item.
7	Select another ingredient from the **Choice of Items** table and add it to the menu item. Repeat this process until all of the relevant ingredients have been added.
8	(Optional) To delete an ingredient from a menu item, select the ingredient and click the **Remove** button.  Do not use this button to reduce the number of units of a selected ingredient. The Remove button deletes the ingredient in its entirety from the menu item price. If more than one unit was assigned, the system will not unconsolidate the item before the deletion is made.
9	(Optional) To adjust the number of units assigned, highlight the ingredient listed beneath the appropriate menu item price. The **Details** box will change, displaying an entry field for the unit measure. Enter or modify the quantity shown, **using whole numbers only**. As the quantity changes, the cost of the ingredients (quantity multiplied by number of units) will be updated as well.  Be careful! Although the **Details** box can display the cost of a partial unit of an ingredient (e.g., 0.5 lb. of crab meat), the system can only deplete the inventory in full units. In other words, assume that crab meat is inventoried in pounds at a unit cost of 6.50/lb. If a crab cake menu item uses half a pound of crab meat, changing the number of units to 0.50 lbs will show the ingredient cost as $3.75. This is correct. However, when the menu item is sold, one entire unit (i.e., 1 lb) of crab meat will be depleted from the inventory, even though only half a pound was actually sold. To correct this problem, the unit measure for crab meat should be defined in half pound (or lower) increments.

Item Assignment



Quick Count

Configuring Reports

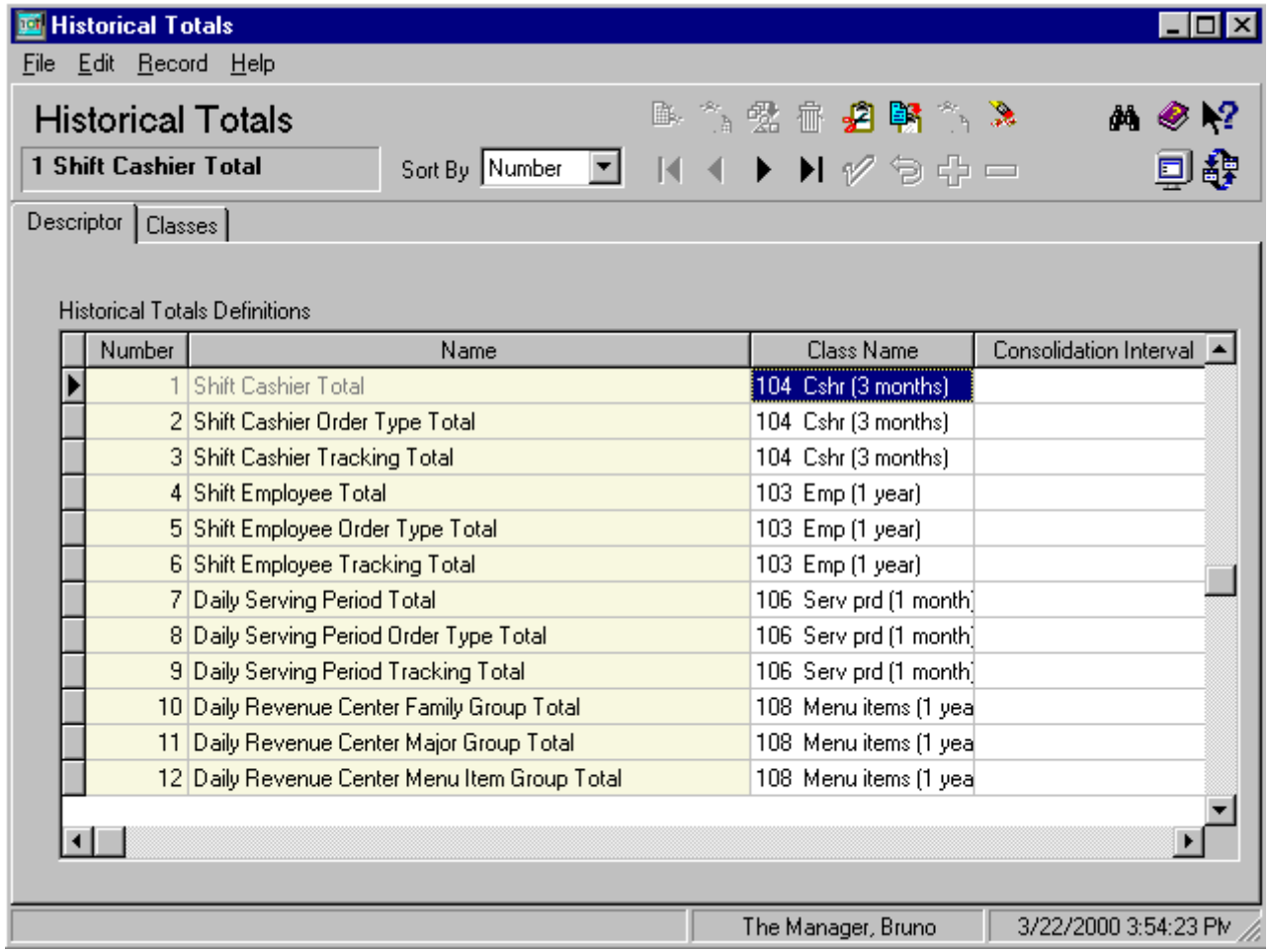
With the inventory itemized and linked to menu items, the system is now able to monitor POS transactions and record the results in the database. These data become the basis for generating the Quick Count inventory reports provided with the feature.

To run a report, the user must establish a link to the appropriate database tables.

Follow these steps to set up the report configuration:

Step	Procedure
1	Open the POS Configurator and select **Reporting | Historical Totals.**
2	Go to the Descriptors tab.
3	From the **Name** column in the **Historical Totals Definition** table, highlight *Daily Quick Count Inventory Totals*.
4	Right-click in the **Class Name** column to open the drop-down list and select the appropriate class.
5	Click ✔ to save the record.

Descriptors



Quick Count

Using the POS Configurator

Using Manager Procedures

Using Manager Procedures

Although ingredients are defined in the POS Configurator, inventory levels are recorded and tracked through Manager Procedures. To accommodate the Quick Count feature, a new Inventory form was added. This form is used to monitor deliveries and waste, to enter the results of a physical inventory, and to provide a comparison of actual versus theoretical usage. Inventory Count Sheets and the I Variance report are also run from here.

The Inventory form consists of the following fields and options:

- **Inventory Item**—An alphabetical listing of all the ingredients entered in th POS Configurator. The column cannot be edited from Manager Procedure
- **Beginning Amount**—Indicates how much stock is on hand at the start of new period. The column cannot be edited. Data are posted automatically the period is closed. The new amount will always equal the ending inventc the previous period.
- **Deliveries**—Represents the sum of all deliveries for that inventory item du the current period. This value is entered manually; Multiple deliveries of th same item must be totaled by the user and entered as a single unit value.

  To avoid confusion and error, MICROS recommends entering deliveries once a period. You may enter deliveries more often as long as you remember that the system will neither total the entries for you nor che to ensure their accuracy.

- **Waste**—Refers to the inventory depleted but not sold through the POS sy (e.g., items wasted through spoilage, breakage, etc.). As with deliveries, tl entry is a manual adjustment, representing the total amount wasted for the current period.
- **Theoretical Usage**—Indicates how much of the inventory was used durin current period. This is the value calculated by the system, based on the number of menu items sold through the POS. It cannot be edited.
- **Ending Inventory**—Represents the results of an on-premises, hand coun the inventory. This is a manual entry.

- **Unit Name**—This is the unit measure (smallest increment) assigned to an inventory item in the POS Configurator. It cannot be edited in Manager Procedures.

- **Print Count Sheets**—Prints a blank form, listing all of the ingredients item in the POS Configurator. This form is used as a checklist for conducting a recording the results of a physical inventory. Items are listed alphabetically

- **Compute Amounts**—Calculates the theoretical usage. This value is syste generated and cumulative for the current period.

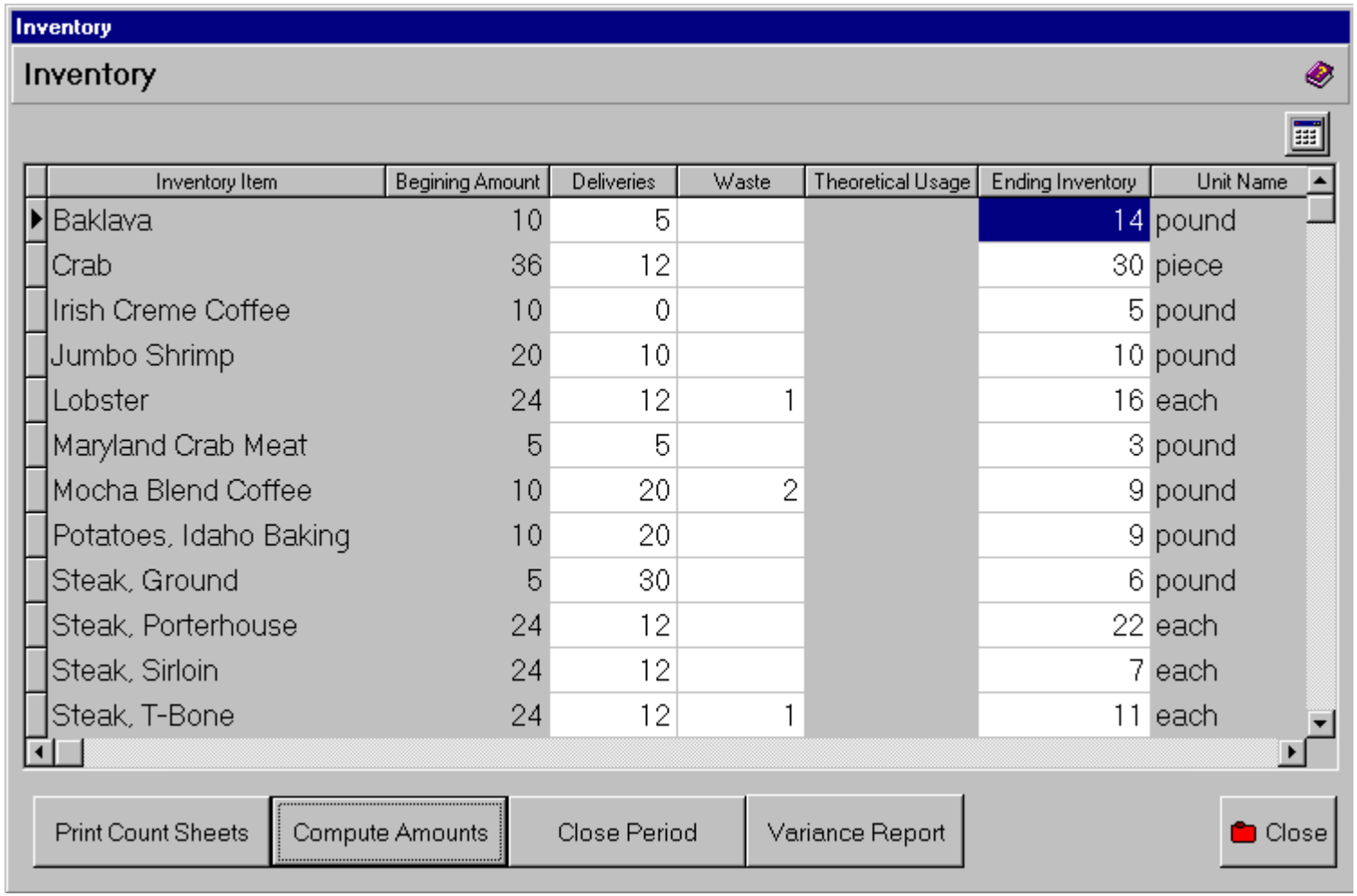
- **Close Period**—Allows the user to specify the end of the current report pe this is a manual process. There are no system-defined periods in Quick C

  Once a period is closed, the form is cleared, and the manually entered **Ending Inventory** is automatically transferred to the **Beginning Amount** column. This process cannot be rolled backward!

- **Variance Report**—Compares actual versus theoretical usage. The syster allows you to define the parameters of a report period through the selectio beginning and ending dates.

Inventory


Inventory
Inventory
Inventory Item
Begining Amount
Deliveries
Waste
Theoretical Usage
Ending Inventory
Unit Name
Baklava 10 5 14 pound
Crab 36 12 30 piece
Irish Creme Coffee 10 0 5 pound
Jumbo Shrimp 20 10 10 pound
Lobster 24 12 1 16 each
Maryland Crab Meat 5 5 3 pound
Mocha Blend Coffee 10 20 2 9 pound
Potatoes, Idaho Baking 10 20 9 pound
Steak, Ground 5 30 6 pound
Steak, Porterhouse 24 12 22 each
Steak, Sirloin 24 12 7 each
Steak, T-Bone 24 12 1 11 each
Print Count Sheets
Compute Amounts
Close Period
Variance Report
Close

Quick Count

Enabling the POS Configurator

Using Manager Procedures

Using Manager Procedures

Follow these steps to monitor and track inventory usage though manager procedures:

Step	Procedure
1	Open Manager Procedures and select the **Menu Items | Inventory** form.
2	In the **Deliveries** column, enter the sum of all deliveries for each item received during the current period. To avoid confusion and error, MICROS recommends entering deliveries once a period. You may enter deliveries more often as long as you remember that the system will neither total the entries for you nor check to ensure their accuracy.
3	In the **Waste** column, enter the sum of all wasted ingredients (i.e., from spoilage, breakage, etc.) recorded during the current period.
4	Click the **Print Count Sheets** button to print out an itemized list of the inventory. Use this list to tabulate the results of a physical inventory of the stock on hand.
5	In the **Ending Inventory** column, enter the results of the physical inventory.
6	Click the **Close Period** button to end the period. When the confirmation box is presented, click **Yes** to continue, **No** to cancel the process. When the period is closed, the **Inventory** form is cleared and the **Ending Inventory** is posted as the **Beginning Amount** for the next period.
7	(Optional) Run the Variance Report. This can be done in two ways: • **As part of the Close Period process**—A dialog box is presented after confirmation, asking if you want to run the report. • **As a separate process—**Click the Variance Report button to run the report independently. When the variance report option is selected, the system prompts you to specify a beginning and end date for the report period.

Quick Count

Reports

The following report provides information relevant to this feature:

- Item Variance
- Inventory Count Sheets

Item Variance Report

Purpose

This report provides a comparison of actual versus theoretical inventory usage for the time frame specified.

Theoretical usage is calculated by the system and based on a consistent use of assigned ingredients which are tracked as menu items are sold through the POS System. Actual usage is calculated from manually entered variables (i.e., Beginning Inventory + Deliveries – Waste – Ending Inventory = Actual Usage). Ending Inventory is the results of a physical count of the stock on hand. Once a report period is closed, this value is automatically assigned as the Beginning Inventory for the next period.

Template

INVENTORY_VAR.RPT

Preview

Click sample to preview this report.

Quick Count – Item Variance Report

Inventory Comparison

Restaurant Name - Location Name 1

From : 01/19/2001 To : 01/19/2001

Report Employee
Printed on Wednesday, January 24, 2001 - 2:45 PM

Ingredient Name	Beginning Inventory	Delivery	Waste	Usage	Theoretical Inventory	Actual Inventory	Variance
Friday 1/19/2001							
Period 1							
Chicken	0.00	0.00	0.00		0.00	0.00	20.00
Ground Beef	0.00	0.00	0.00		0.00	0.00	30.00
Period 2							
Cheese	0.00	5.00	1.00	2	2.00	1.00	-1.00
Chicken	20.00	10.00	2.00	2	26.00	15.00	-11.00
Ground Beef	30.00	12.00	3.00	2	37.00	28.00	-9.00
Period 3							
Cheese	1.00	0.00	0.00		1.00	1.00	0.00
Chicken	15.00	0.00	0.00		15.00	11.00	-4.00
Ground Beef	28.00	0.00	0.00		28.00	29.00	1.00
Salmon	0.00	4.00	2.00	2	0.00	0.00	0.00
Period 4							
Cheese	1.00	3.00	1.00	2	1.00	4.00	3.00
Chicken	11.00	4.00	3.00	2	10.00	5.00	-5.00
Ground Beef	29.00	5.00	2.00	2	30.00	5.00	-25.00
Salmon	0.00	7.00	1.00	2	4.00	66.00	62.00

Inventory_var.RPT

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Inventory Count Sheet

Purpose

This report provides an alphabetical listing of the inventory items currently entered in the system database. The count sheets item names and unit measures, and provide blank spaces to record the results of a physical inventory of the stock on hand. The results are then entered as Ending Inventory in the **Manager Procedures | Menu Items | Inventory** form.

Template

STOCK_TAKE.RPT

Preview

Click sample to preview this report.

Quick Count – Inventory Count Sheet

StockTake List

MICROS Systems - Bar & Grille

Employee Name
Printed On 1/26/2001 1:33:23PM

Item Name	Quantity	Unit	Remarks
american cheese		slice	
burger		patty	
burger bun		each	
caviar		gram	
donut		each	
fries		order	
salmon cake		each	
shrimp		each	

STOCK_TAKE.RPT

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