Feature Reference Manual

myinventory

8th Edition

Declarations

Warranties

Trademarks

Design and Production

This manual was written with Adobe FrameMaker.

Printing History

New editions of this manual incorporate new and changed material since the previous edition(s). Minor corrections and updates may be incorporated into reprints of the current edition without changing the publication date or the edition number.

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5th	March	2008	3.1
6th	September	2011	6.3
7th	February	2012	6.3 Rev. A
8th	March	2012	7.1

Welcome

Welcome to the MICROS myinventory application. myinventory is a Web-based enterprise wide inventory management solution which provides purchasing, receiving, and stock management functionality, along with full recipe and product costing capabilities. Since the database is hosted centrally, there is no software installation required at the location level. All software updates are automatic, allowing the User to benefit immediately from any newly added features or reports.

Like mymicros.net, myinventory is hosted by MICROS, and can be delivered as an ASP service, or a traditional software license may be purchased with separate hosting services.

This section describes some of the “basics” for understanding and using the myinventory User Interface. Please be sure to look over these concepts, as they are the building blocks for many of the myinventory modules that you and your organization will be using to simplify your inventory needs.

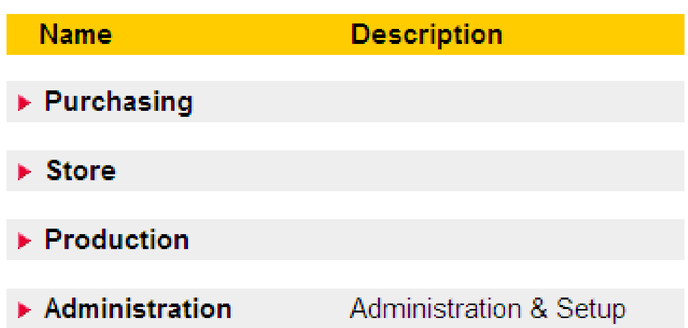
The Main myinventory Menu

There are 3 different menu layouts for the myinventory Application:

1. Collapse Menu
2. Classic Menu
3. Advanced Menu

Menu view is determined in the Settings module. Organizations can decide for themselves which view is most appealing to them.

The Collapse Menu View



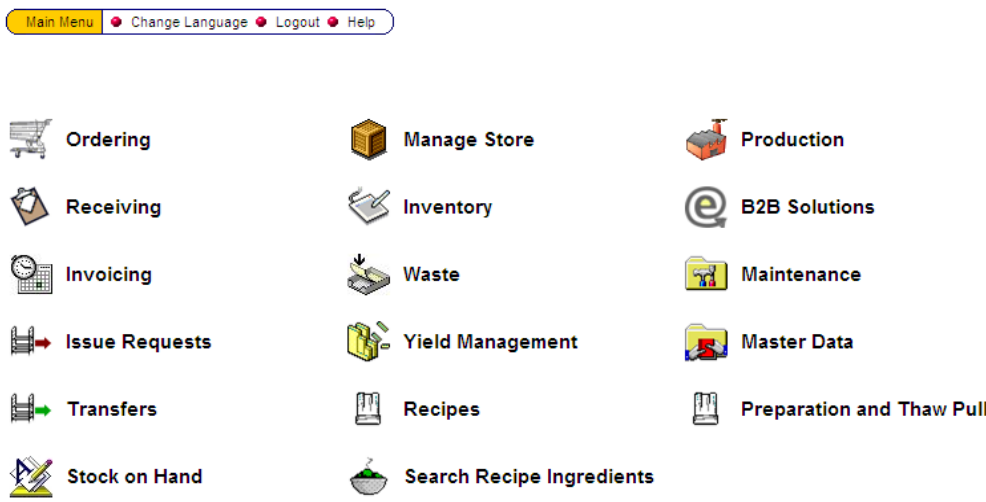
The Collapse Menu has modules categorized by 4 groups:

1. Purchasing – any action requiring the purchase of goods
2. Store – any store level action

3. Production – functions dealing with production of recipes, prep, etc.
4. Administration – all administrative level tasks

Clicking on any of these group names reveals a sub-menu of information. Many of the options in the sub menus may not be available to all Users. The ability to access these modules is determined by User Rights. User Rights are assigned by the System Administrator in Maintenance | User Management.

The Classic Menu View



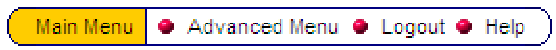
Similar to the Collapse Menu View, many of the icons seen here are not available to all Users. The ability to access these modules is determined by User Rights, which are assigned by the System Administrator. These icons include:

◆ Ordering	◆ Yield Management
◆ Receiving	◆ Recipes
◆ Invoicing	◆ Search Recipe Ingredients
◆ Issue Requests	◆ Production
◆ Transfers	◆ B2BSolutions
◆ Stock on Hand	◆ Maintenance
◆ Manage Store	◆ Master Data
◆ Inventory	◆ Preparation and Thaw Pull
◆ Waste	

Classic Menu

Top Menu Bar – Classic Menu

The Top Menu Bar is described in the table below. Click on the label/link that you wish to use. This Top Menu Bar is consistent throughout the entire application with only subtle differences.

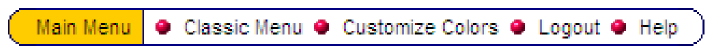


Menu Item	Description
Advanced Menu	Click to enable the Advanced Menu option
Logout	This will log you out of the application
Help	Launch the Help file

The Advanced Menu View

The Advanced Menu is where you can decide how you would like your screen to look. You have the option of using side menu navigation, or using the icons (similar to the Classic Menu).

Top Menu Bar - Advanced Menu



Menu Item	Description
Classic Menu	Click to enable the Classic Menu option
Customize Colors	This option allows you to change the colors of the Advanced Menu. A list of possible color options for modifiable fields will appear
Logout	This will log you out of the application
Help	Launch the Help file

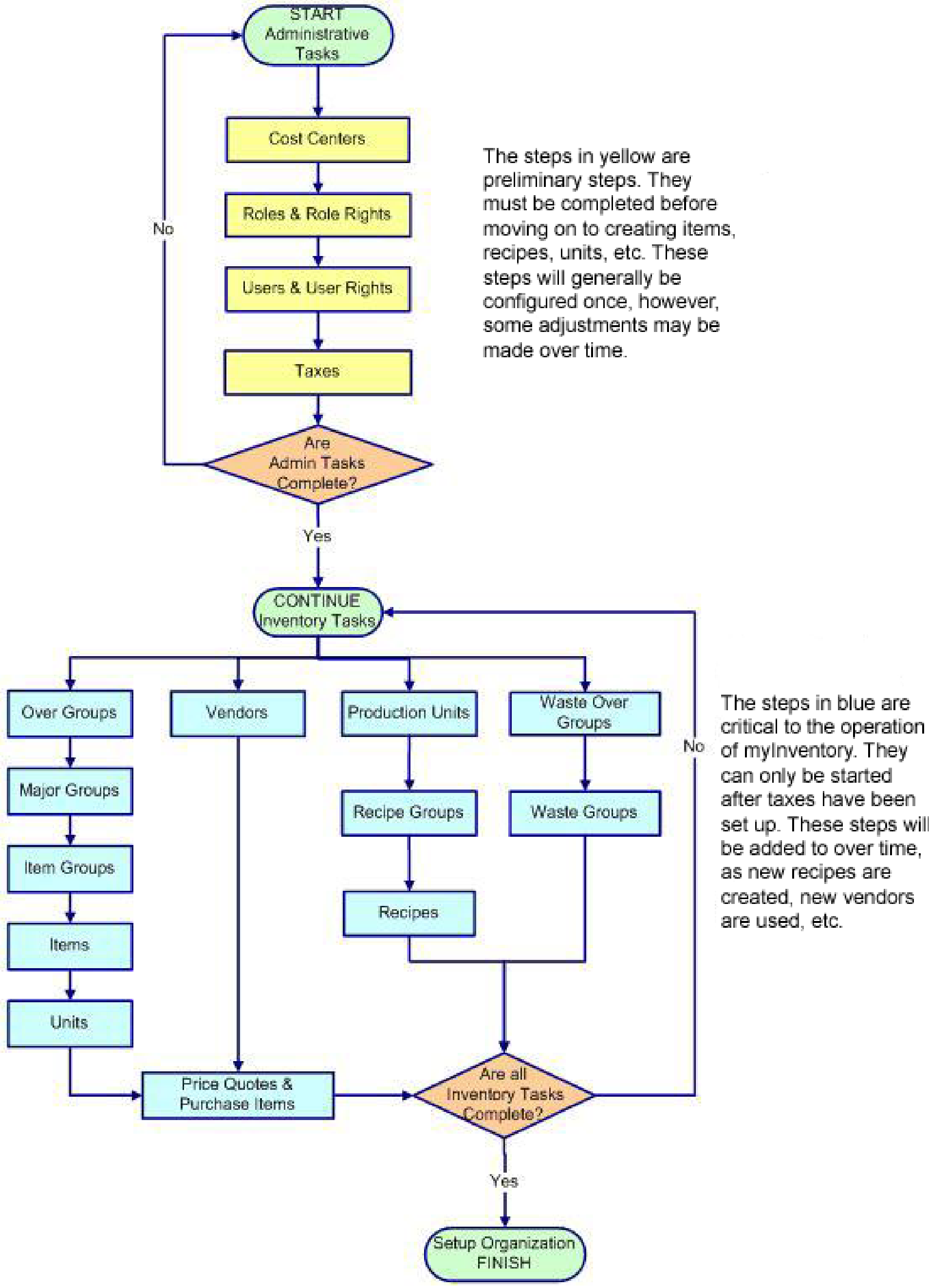
System Administrators have the ability to “lock down” a specific menu type on an enterprise level. If desired, an organization can force Users to use either the Advanced Menu or the Classic Menu, or continue to allow Users to select which view they use.

Suggested Setup

myinventory is a multi-faceted, feature rich application. There are many components to the myinventory application, therefore setting up a new organization does require careful consideration and attention to detail. There are both required configurations, as well as optional configurations. Implementing the required steps will allow an organization to utilize the application in its most basic form. Inclusion of the optional configurations will allow for a fuller myinventory experience.

Required Configuration

The following flow chart displays the typical and suggested order for setting up an organization for basic use:



Optional Configuration

Unlike the required configuration, there is no set order for optional tasks. The only restriction is that they be set up after the organization has been completely configured. Optional configuration includes, but is not limited to:

- Menu Item Linking (although this is optional, you will not be able to track depletions without configuring this feature)
- Order Cycles
- Lists
- Visibility Criteria
- Categories

Screen Layout

All screens are designed with a consistent look and feel. The goal is to provide easy navigation for all Users, regardless of graphical user interface (GUI) experience or inventory tracking experience. There are 3 main components in any module:

1. Top Menu Bar
2. Filters
3. Information Bar

The next few sections describe these components.

Top Menu Bar

The Top Menu Bar will be located in the same area of the screen on every page: the top left. It is easily recognized as an oval-shaped bar, with the module/screen name on the left side on a yellow background, and selectable functions to the right of the divider on a white background. A typical Top Menu Bar looks like:

Note that this particular Top Menu Bar was taken from the Inventory Module. You can see the name, Inventory, displayed, which will orient Users to their current page. All of the red-ball options are selectable. Periodically, a grayed option is seen; grayed options are dependent upon either an action that must take place first or on a User Right. Not all Top Menu Bars are the same. They will be discussed in greater detail in their appropriate sections.

For every Menu Bar, there is a Help option and a Main Menu option. The Help option will open a pop-up window with information about the current module. The Main Menu option will redirect you back to the Main myinventory Menu.

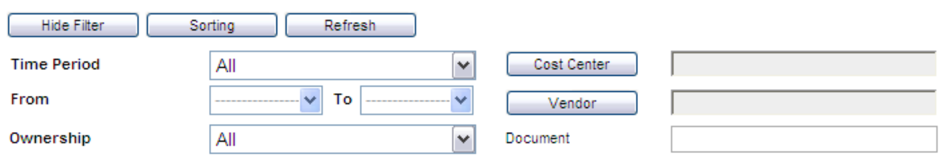
For the Maintenance and Master Data modules, the Top Menu Bars will also include a Maintenance option and a Master Data option if the Classic Menu View has been selected. Both of these options will return you to the respective sub-menu. Maintenance and Master Data accessibility are dependent upon User Rights. In the event of the Collapse Menu, the User will only have the option of being taken back to the Main Menu. For more information, refer to Maintenance or Master Data.

Filters

In almost every module, there are filtering techniques that can be applied to search for records. This can be especially helpful since many modules may have hundreds of records. For example, in the Stock on Hand module, hundreds, potentially thousands, of entries could exist. Rather than having to scroll one-by-one in search of the desired Item, we have provided filters to speed up the process.

Filters behave the same way, regardless of where you might find them. Some filters will seem “standard” amongst modules, whereas some filters are module-specific.

Common Filters



There are many filters that tend to be standard and can be found throughout the myinventory application. The following section describes a few of these seemingly standard filters.

Screen Element	Description
Hide Filter	Use this to hide the filters on the page, which will conserve space and show more data in the information area.
Sorting	Use this to open a Sort window that will allow you to select the order in which to sort columns, as well as determine whether the results will be in ascending or descending order.
Refresh	Use this once after choosing a different filter set to execute and display the new settings. This also includes any changes made to the Items.

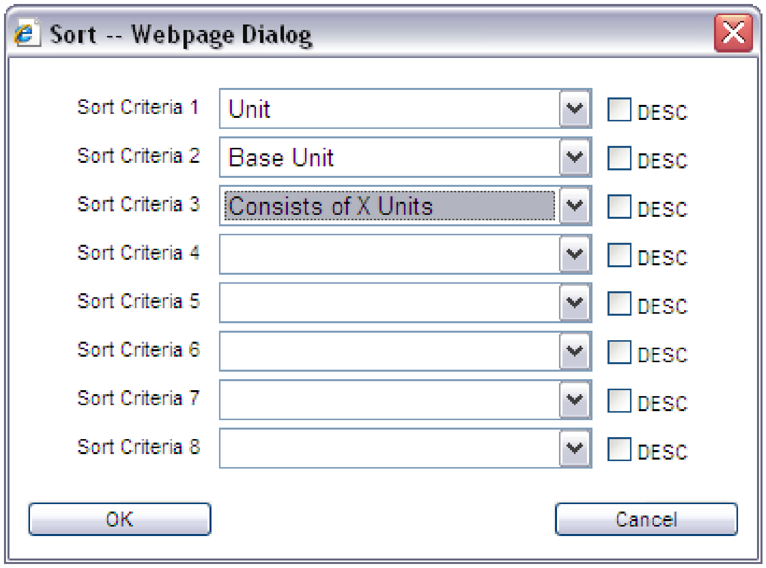
Screen Element	Description
Time Period drop-down From drop-down Ownership drop-down	Use this filter to change your view by time period and ownership. To filter Time Period on all data, current year, last year, etc, click on the drop-down box and make your selection. Choose User-defined to enter a specific date in the From and To fields. Use the calendar icons to choose a specific date range that you would like to view. When filtering by ownership, you might find that you are limited to only your User. This means you can only see what you have created and worked on yourself; otherwise, you may be allowed to view everything within your department, or both, depending on User Rights set up at the system administrator level.
Cost Center and Vendor	These filter fields allow you to search for documents and Items belonging to a certain Cost Center or Vendor. There are many examples of these filter fields throughout the myinventory application. Some include Item Group, Item, Base Unit, ect.
Document	This type of filter field can be identified by the lack of a button. Examples of this filter throughout the application are Document, Item, Unit, Name, ect. To use this filter, enter the starting characters of the document, Item, ect., that you wish to search for. After Refreshing the page, anything beginning with the entered characters will be displayed.

Show/Hide Filters

You can choose to see or hide all of the filters available for this particular module by clicking Show/Hide Filters in the Overview window. Hiding the filters creates more space in the window to show the filtered results. If the filters are already hidden, click the Show Filters button to re-display the filters.

Sorting

You can use the Sorting option to open a new window and enter different criteria by which to sort.



Depending on the module you are using, the sort criteria may differ.

Sorting by Columns

In addition to the sort button that allows a User to select a criteria, there is also the ability to sort by column headers. The User can click the column header to sort by that column. A single click sorts ascending. Clicking the header again will sort in descending fashion.

Item No.	Item	Unit	SOH	Min	Par	Max
	9000 Bread Texas Toas W/Egg Sli	OZ	0.000	0.000	0.000	
	Bagel, Sesame Frozen	EACH	0.000	0.000	0.000	
	BR, Egg Thick	BAG/16 SLICE	6.250	0.000	0.000	
	BR, Flat Herb	Bag/10 CT	0.000	0.000	0.000	
	BR, Rye	Bag/13 SLICE	0.000	0.000	0.000	
	BR, Sourdough	Bag/13 SLICE	0.000	0.000	0.000	
	BR, Wheat	BAG/14 SLICE	0.000	0.000	0.000	
	BR, White	BAG/22 SLICE	-0.136	0.000	0.000	

Refresh

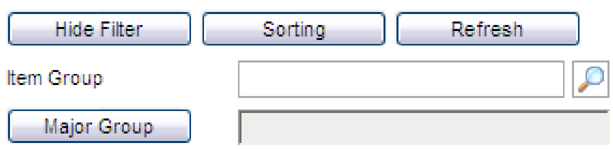
Use the Refresh button to update data in the myinventory user interface. In some instances, you may be required to select a filter and then click the Refresh button for data to display. In other instances, when first accessing a module, there may not be any data currently populated in the window. To see this data, you must click Refresh.

Time Period:

Use the Time Period filter to specify the time period for the data you want to display. Choose from:

1. **All Data** – to show all data entered into the system
2. **Current Year** – to show data entered in the current calendar year. The dates in the From and To fields will change to reflect the selected range.
3. **Current Month** – to show any data entered into the system in the current calendar month. The dates in the From and To fields will change to reflect the selected range.
4. **Last Month** – shows any data entered into the system during the last calendar month. The dates in the From and To fields will change to reflect the selected range.
5. **Last Year –** shows any entries made in the last calendar year – not the last 365 days. The dates in the From and To fields will change to reflect the selected range.
6. **User Defined –** allows you to specify a time period of your choosing by selecting custom dates from the pop-up calendar in the From and To fields.

Search Filters

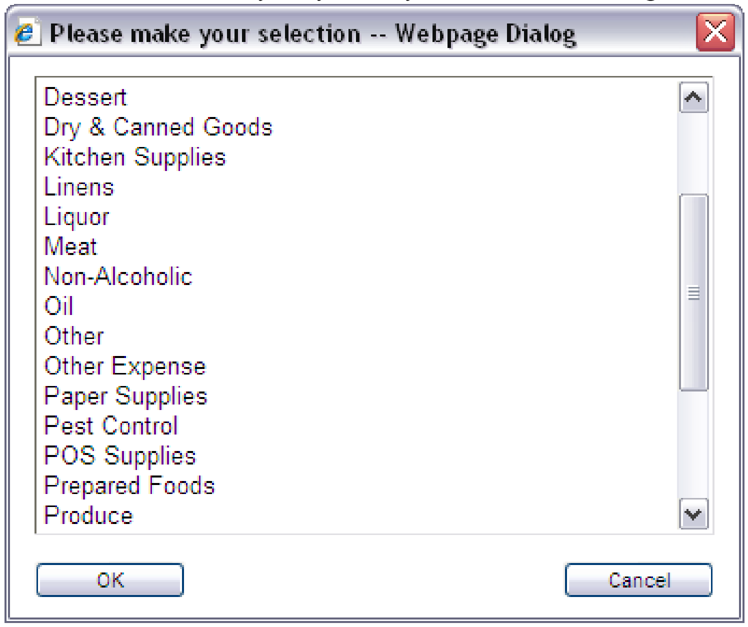


These filter fields give you the option of searching the database for the specified record.

For example, if you need to find an Item Group and you know the Major Group it belongs to, you can set your filters to only show Item Groups belonging to that Major Group:

1. Place your cursor in the Major Group field

2. Press the Enter key on your keyboard; the following window will be displayed:



3. Select the Major Group by clicking the name and selecting OK
4. Refresh the screen and all of the Item Groups belonging to the selected Major Group will be displayed

This functionality is found in many modules in the myinventory application. These filter options can include, but are not limited to: Cost Centers, Vendors, Items, Units, Roles, etc. Once again, User Rights play a part in how someone is able to filter results and whether they will have access to some filters.

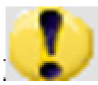
Wildcard Search

Anywhere there is a Name field such as the one on the left, you will have the ability to do a Wildcard search. This means that you may search for the characters in any part of a document or Item's name by putting a % at the beginning and end of the entered characters. For example, cheddar cheese may be named cheese, cheddar in the Items module. To find it by entering cheddar, type %cheddar% in the search field and click Refresh. Any Item with cheddar anywhere in the name will be displayed in the result set.

Magnifying Glass

Another search feature available is the magnifying glass. The magnifying glass will appear primarily in the Master Data Module. The magnifying glass is a means of searching in the current result set, i.e. it will only search the data that is already populated. That means that after narrowing down your searches, you may have an idea of what you might be looking for. By entering the name or partial name of the record in the Name field and clicking the magnifying glass, you will be taken to the first possible result that matches the entered search criteria.

Exclamation Mark



Throughout the application, you may encounter an exclamation mark in some of your Item lists within modules. This exclamation mark is an indicator that something has happened to your Item:

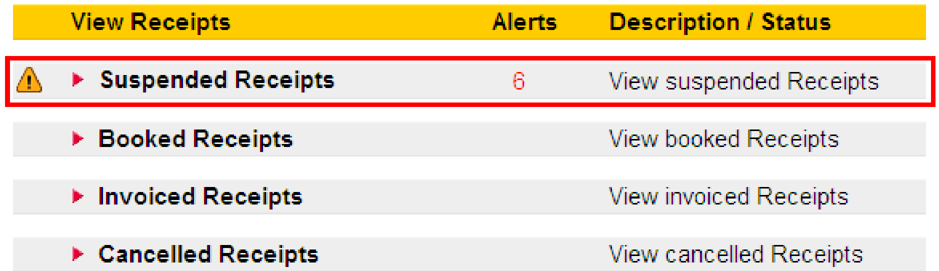
Item	Unit	Article No.	Price
Bread Crumbs Italian	1/25 LB	4313235	41.82000
Meal Corn Yel Self Rising	1/25 LB	6297362	12.62000
Wheat Germ	1/25 LB	0996595	68.96000
Sugar Granulated Cane x Fine	1/25 LB	5087572	17.40000
Chocolate Chip Semi Real	1/25 LB	4144697	48.39000
Bread Crumbs Japanese	1/25 LB	5495460	26.18000
Pepper Red Roasted	12/28 OZ	5818455	29.78000
Walnut Half & Pieces	6/1.75 LB	4069399	77.87000

When you move your mouse over the yellow exclamation mark and pause while hovering over it, information will appear:

Item	Unit	Article No.	Price
Bread Crumbs Italian	1/25 LB	4313235	41.82000
Meal Corn Yel Self Rising	1/25 LB	This item has already been linked	00
Wheat Germ	1/25 LB	0996595	68.96000
Sugar Granulated Cane x Fine	1/25 LB	5087572	17.40000
Chocolate Chip Semi Real	1/25 LB	4144697	48.39000
Bread Crumbs Japanese	1/25 LB	5495460	26.18000
Pepper Red Roasted	12/28 OZ	5818455	29.78000
Walnut Half & Pieces	6/1.75 LB	4069399	77.87000

Alert Symbol

Whenever a Alert Symbol is displayed, it means that there is something worth examining within that module. For example, if you see a Warning Symbol in the Receipts | Suspended line, it means that there is something that needs your attention:



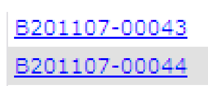
Information Bar

On many screens and in many modules, you will find a long, blue bar that extends the width the page. This is the information bar. In it are the headings for the columns of those lists. This bar is dynamic and will change depending on the module you are working in. An information bar looks something like:

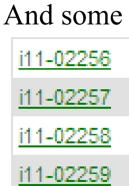
This is the information bar from the Receiving module. In this case: Document is the name of the Receipt; Vendor is the name of the Vendor the goods were from; Status is the current state of the document; Delivery Date is the date the goods were delivered to the Cost Center; Changed By displays the last User who changed the Receipt; Changed At is when the last change was made; Created By is the User who created the Receipt; Created At is when the Receipt was created.

Also, in most modules, you will see records on the page, which vary depending on status:

Some records are blue, such as Lists and Inventory Counts:



And some records are green, such as suspended Purchase Orders and Receipts:



Standard Tasks

Standard Tasks in myinventory Include:

- Saving and Suspending
- Adding Items
- Printing and Previewing
- Deleting Items and Documents

Saving and Suspending

Saving is a standard function offered in many of the modules. Saving will retain the information until it is ready to be used again.

Suspending assigns an interim status called “Suspended”. Generally, modules that have suspending capability are those that have something that needs to be “booked”. Booking is the concept of submitting and finalizing your order/request/transfer, etc. In most cases, Suspending means you have not finished creating or composing a record, or that you have finished and have elected not to book it yet.

Save Using the Toolbar

If you are creating a new record or you want to update a previously created record, use the Save toolbar option.

1. From the Top Menu Bar, select Save

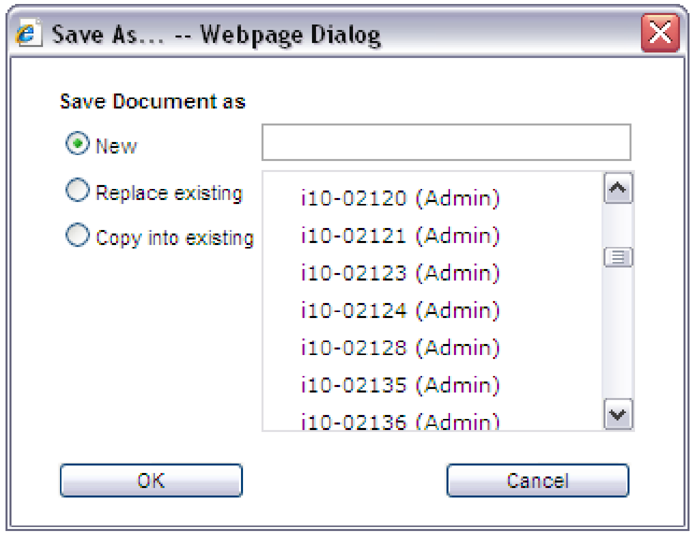
2. The window will refresh and the information is saved as the same name before it was updated in the database.

Save As…

If you want to save information for a record under a different name, use the **Save As…** option in the tool bar at the top of the window.

To save information under a new name:

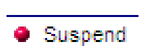
1. Select **Save As…** from the Top Menu Bar; the Save As… dialog box appears:



2. Choose to save either as a new filename or an existing filename
   - If you choose New, enter the new filename in the text field.
   - If you choose Replace Existing - this completely replaces the originally saved document.
   - If you choose Copy into Existing - this will add/include the changes to the originally saved document.
3. Select **OK**
4. The screen will refresh after the information has been saved.

Suspending

You can suspend a document in a few different ways. When you save without booking, the status is automatically set to Suspended and you will remain in the Details window. You can also actively set the status to Suspended by clicking Suspend in the Top Menu Bar, which will return you to the Overview screen. You can always return to a Suspended record to finish it later, provided that you have saved it first.

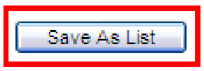


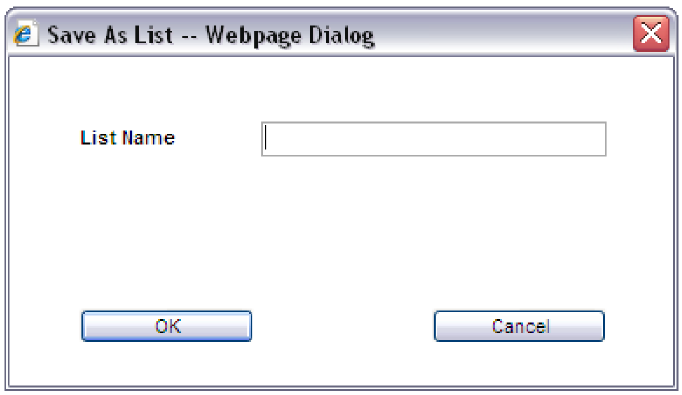
Saving as a List

Similar information can be saved as a List and used again like a template from which to create new Orders/Requests/Transfers, etc. These Lists can be added to or subtracted from. A pre-saved List provides a more convenient starting point by pre-populating new Items with common Items.

Once you have created a new document and added the Items you would like to appear in the List, you can save the Items as a List. To save as a List:

1. Select the Save as List button; the Save as List dialog box appears:





2. In the field, enter the name for the List – click OK; a confirmation box will appear
3. Click OK

When you return to an Overview window, you can set your filters to search for your new List.

Adding Items

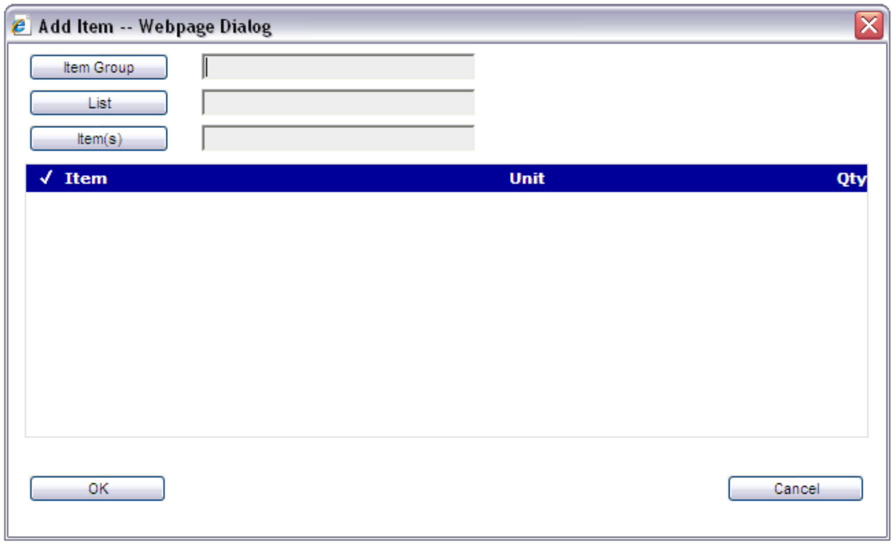
You will find that you are able to add Items to documents throughout many modules. Although the Items may vary depending on the document, the concept is the same.

For our example, we will add Items to a Transfer:

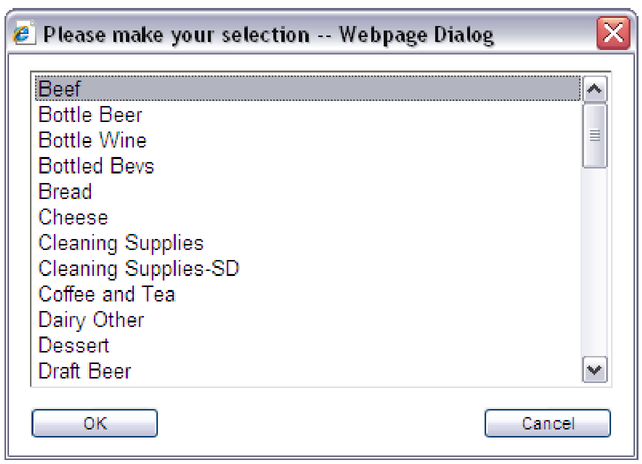
Once you have opened a Transfer, you can add Items:

1. Select a Transfer To to add an Item to, or create a new Transfer

2. From the Transfer To Detail window, click the Add Item(s) button; the following window will be displayed:

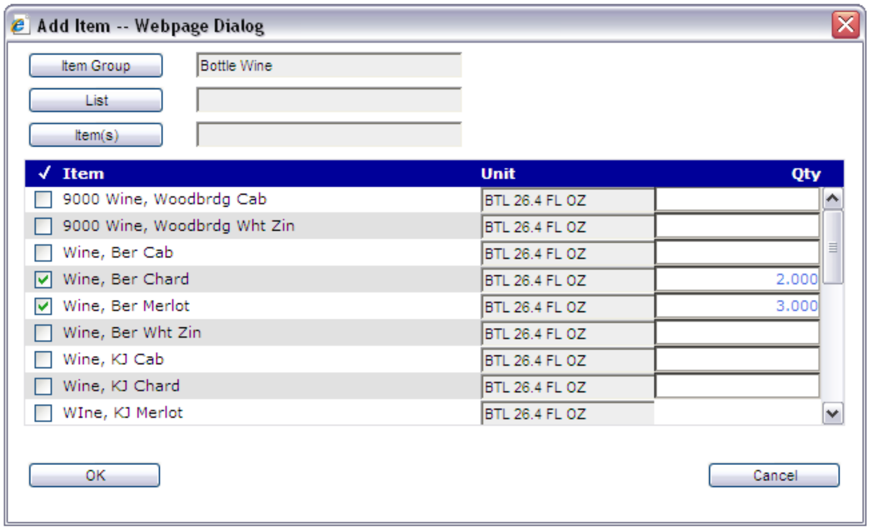


3. If you know the Item Group, List, and/or Item, click in their corresponding fields to pull up all of the available options.



Select the appropriate option and click OK

4. Enter the quantity of each Item you would like to add to the Transfer To and click OK:



5. Repeat steps 3-4 to add more Items (if necessary)
6. Click Cancel from the Add Items dialog box when you have finished adding Items

The Transfer To Detail window will refresh with the Items you have added.

Printing and Previewing

When it comes to printing, there are generally two means by which to print. Printing can be achieved by clicking Print or Preview. Both options will open a PDF document of the current information in an internet browser, and then you can use the PDF print button to print. By converting to PDF format, you will have a nicely formatted copy of the information you have elected to print.

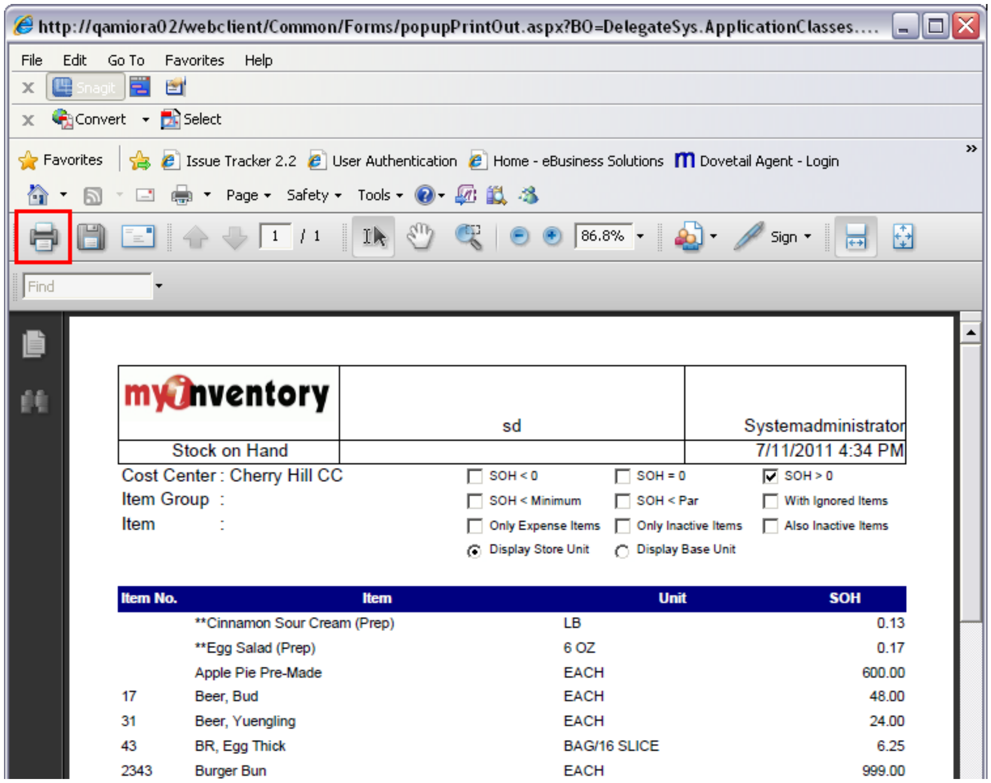
In some modules you will see **Print** and **Preview** listed separately. In other modules you may only see **Print**. And again, in some modules you will only see **Preview**. Ultimately, they serve about the same purpose.

Not all modules allow for printing. Be sure to see if any of the terms above are available in the Top Menu Bar.

You can print using the options provided on the Top Menu Bar. For our example, we are printing from the Stock on Hand Module.

1. Select the Stock on Hand icon from the Main myinventory Menu
2. Use the filters and the Refresh button to show data
3. Select a Stock on Hand
4. Select Print from the Top Menu Bar:

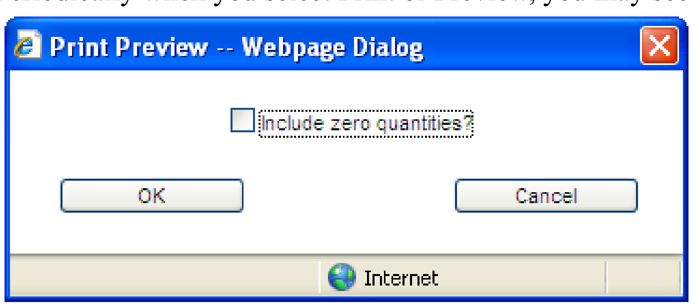
5. A PDF will open; use the print button from the PDF toolbar to print.



Note	*Depending on the Settings configured in Maintenance | Settings | General tab, the Report could be displayed as an HTML printout, instead of a PDF.*

Additional Information

Periodically when you select Print or Preview, you may see the following box:



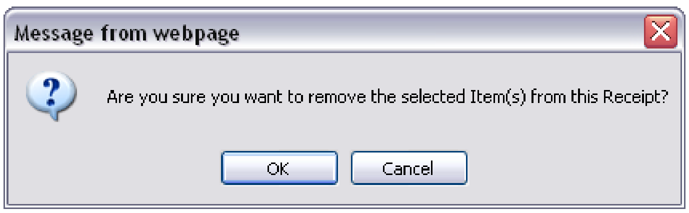
By selecting “Include zero quantities”, your print out will display Items with a quantity of zero. If you do not enable this option, any Items with the quantity of zero will be omitted from the PDF and will not print.

Deleting Items

In many modules, you are able to delete individual Items or additions from a record. For example, if a Vendor was out of an Item that was on the Purchase Order, it would need to be removed from the Receipt so that it does not get received into inventory.

To delete (for our example, we are using a suspended Receipt):

1. Enter the Receipt Detail window
2. Select the Items you want to delete using the check box to the left of the Item name.
3. Click the Delete Item(s) button
4. Select OK from the confirmation dialog box



The Items are removed from the Receipt and the Receipt Detail window will be refreshed without the Items that have been removed.

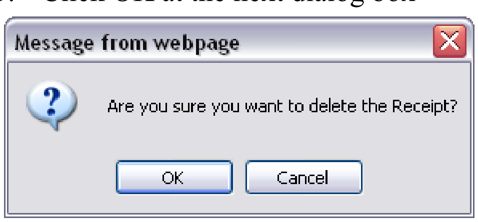
Deleting a Document

Deleting is a relatively straightforward concept. The idea is that a document, be it a suspended Purchase Order or Receipt, exists and you do not need it any longer. The steps are relatively similar, regardless of the module. To delete:

1. Enter the Detail window for the document you want to delete
2. Select Delete from the Top Menu Bar:

The document type being deleted will always be included in the Top Menu Bar; for this example, we have selected the Waste module, so the corresponding dialog box will be specific to Waste.

3. Click OK at the next dialog box



Tips & Tricks

Throughout this document, you will come across myinventory Tips & Tricks:

Tips & Tricks	*This is a Tips & Tricks box. Inside will be valuable information or advice on previously identified "trouble spots" for the myinventory configuration*

The Tips & Tricks areas were developed as a "helpful hint" for myinventory setup. MICROS recognizes the complexities of creating any automated inventory system, and as such, has taken great lengths to try to advise Users of where potential pitfalls might exist.

As always, MICROS and myinventory would appreciate any feedback you may have on this document. After reviewing this document and configuring the myinventory application for your organization, if you have any suggestions as to other trouble spots, please feel free to contact the MICROS eBusiness Solutions group at mymicros@micros.com.

Ordering

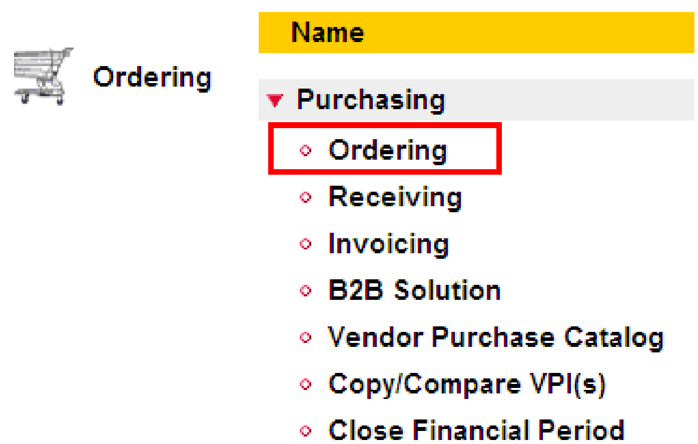
Introduction and Overview

The ordering process within myinventory is extremely simple and quick, allowing the busy manager to spend minimal time creating an Order. Tools have been designed to create “Order Lists” for common or regularly Ordered Items. One function that simplifies the process is the ability to create an Order containing multiple Vendors.

myinventory provides three different methods of Ordering: 1) manual, 2) automatic based on par levels, and 3) automatic based on usage. When the Order is final, in addition to placing the Order by phone or fax, it can be sent electronically via email or through a B2B Interface with the Vendor.

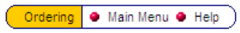
Accessing the myinventory Ordering Module

To access the Ordering module, from the Main Menu, click the Ordering icon or select Purchasing | Ordering:



The Ordering Overview Window

The Ordering Overview window is the first window you see after accessing the Ordering icon on the main myinventory page.



Order by	Description
Master Order List	Create an Order by Master Order List
Order Cycle	Create an Order by Order Cycle
Order List	Create an Order by List
Vendor	Create an Order by Vendor
Suggested Order by Vendor	Create an Order using Suggested Order by Vendor
Blank Order	Create a blank Order

View Orders	Alerts	Description / Status
Suspended Orders	10	View Suspended Orders
Open Purchase Orders	16	Open Purchase Order(s)
Pending Orders	28	View Pending Orders
Booked Orders		View Booked Orders

From this window, you can create an Order from scratch, begin working on an Order from a pre-established list, or complete a suspended Order you worked on earlier. You can also view Orders that have already been completed or booked.

In the Ordering module, you can create an Order by Order list or by Order Cycle, create a blank Order, create an Order using suggested quantities, as well as view existing Orders.

Creating Orders

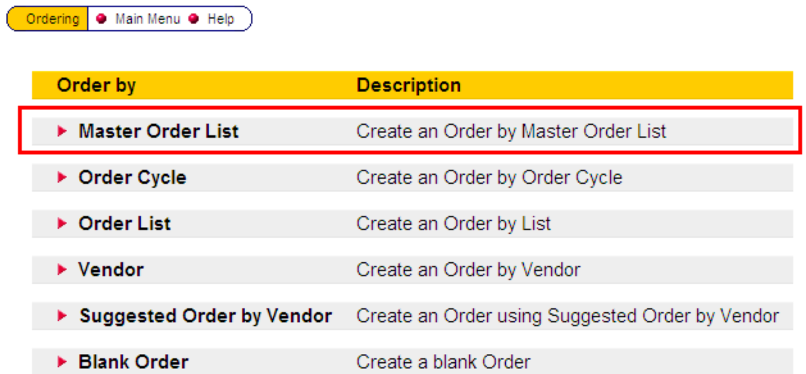
Orders can be created by various formats:

- By Master Order List
- By Order Cycle
- By Order List
- By Vendor
- By Suggested Order Quantity
- Blank Order

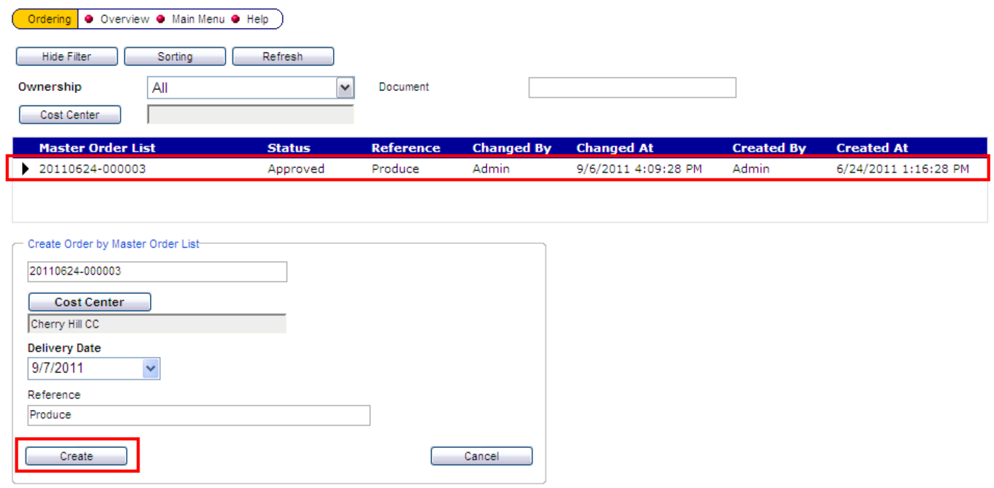
Order by Master Order List

Master Order Lists define Item Prices by List vs. Vendor Purchase Item. It allows for a specification of quantities available at the List Price and tracking of quantities ordered at that Price. Items whose Quantity Ordered has met the limit will no longer be available for Ordering.

1. Select Master Order List from the Ordering Overview window:



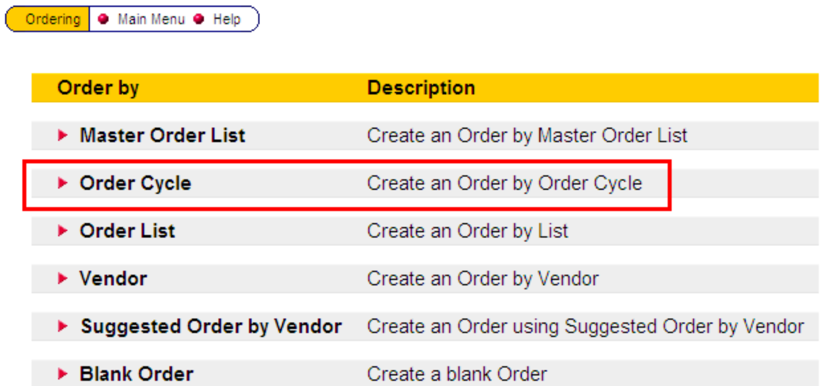
2. Select an existing Master Order List and modify the Delivery Date, and/or Reference fields as necessary, and click Create:



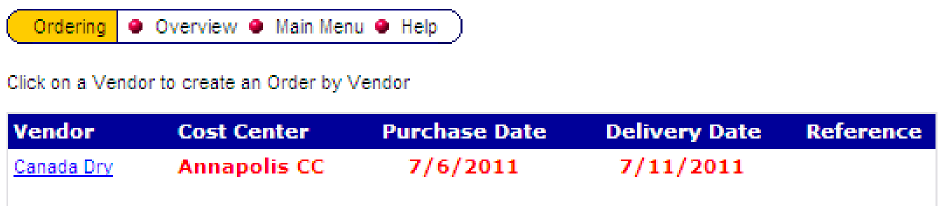
You will be taken to the Purchase Order Detail page where you can make modifications to the Order, as needed.

Order by Order Cycle

1. Select Order Cycle from the Ordering Overview window:

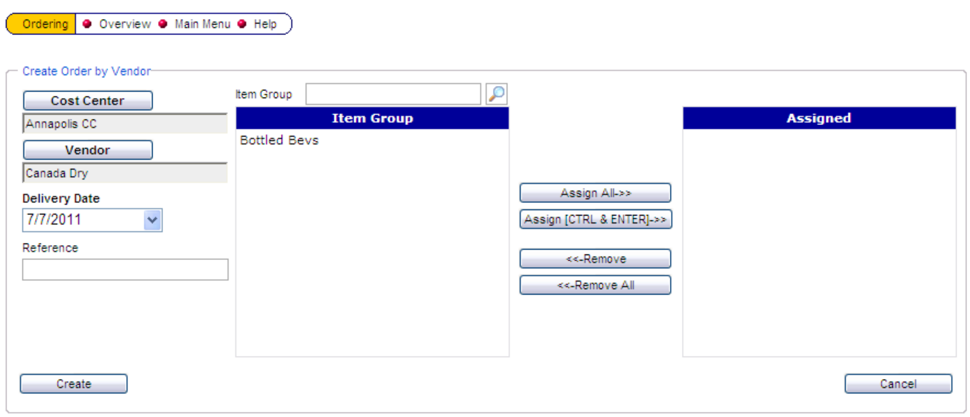


2. Click on a Vendor

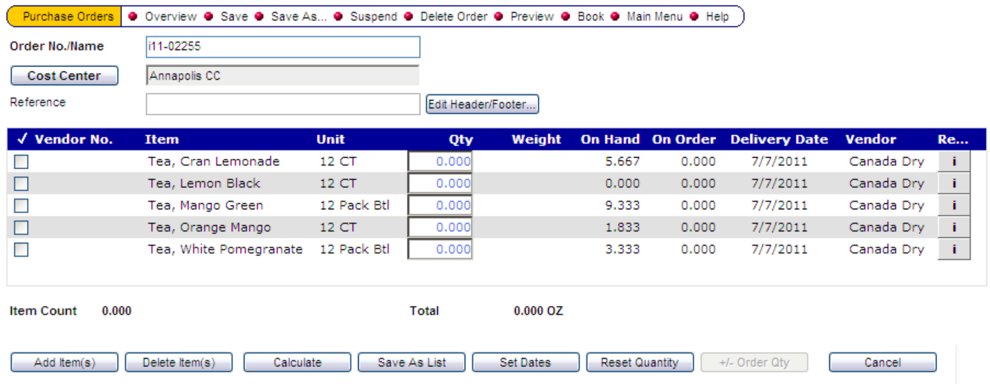


Note — *Records in red signify an Order that should be placed on the current date.*

3. Select Item Groups and assign them; when you are finished, click Create



4. From the Purchase Order Detail page, add Items, modify the Order, and then Save, Suspend, and/or Book the Purchase Order

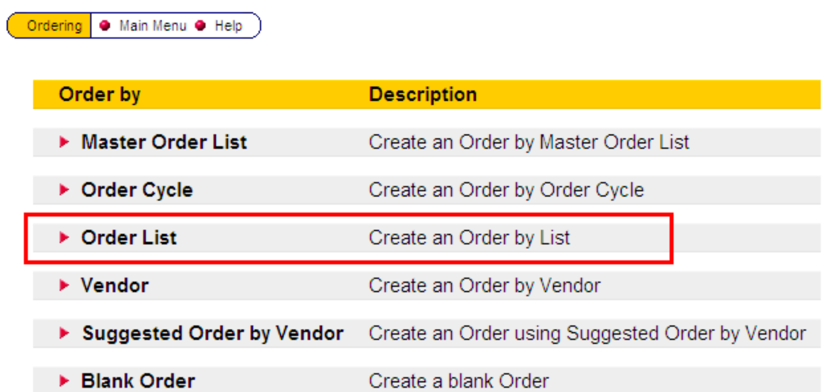


Order by Order List

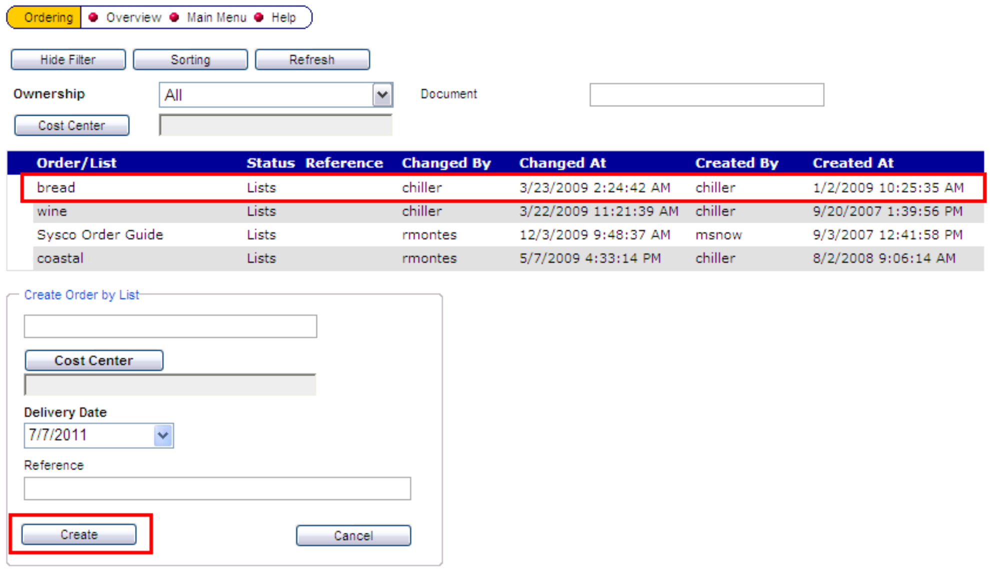
Tips & Tricks

MICROS recommends creating Orders from Lists. This is a big time saver. Suggested Orders can only be done by a List or a Vendor.

1. Select Order List from the Ordering Overview window:



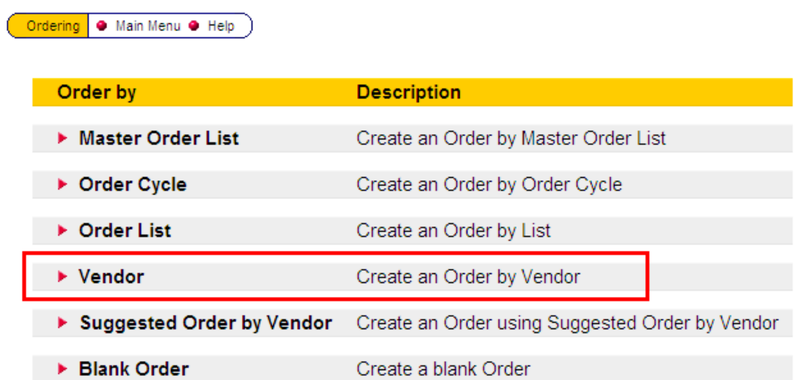
2. Select an existing Order List and modify the Cost Center, Delivery Date, and/or Reference fields as necessary, and click Create:



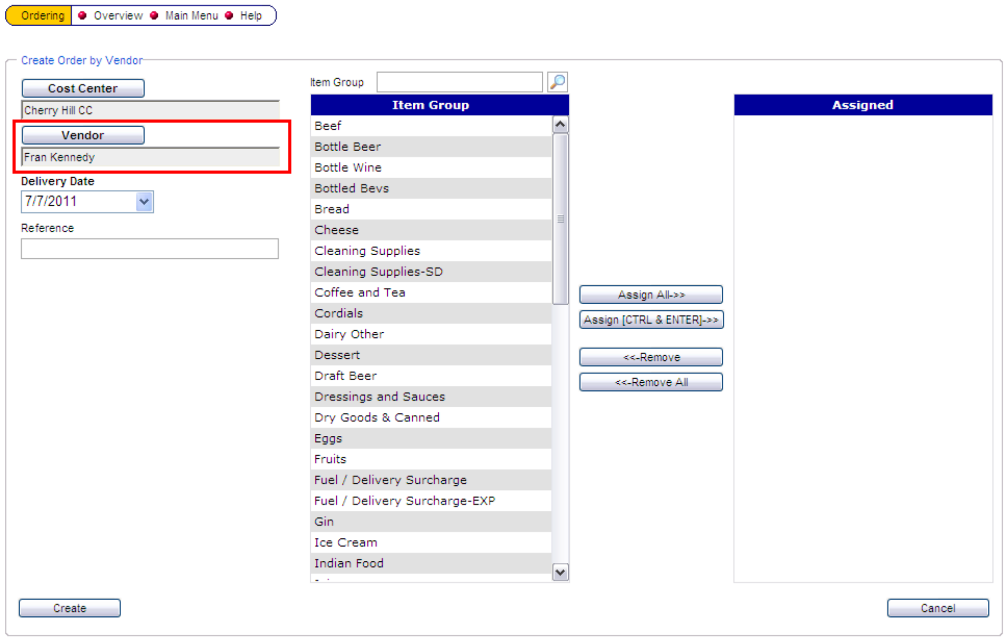
You will be taken to the Purchase Order Detail page where you can make modifications to the Order, as needed.

Order by Vendor

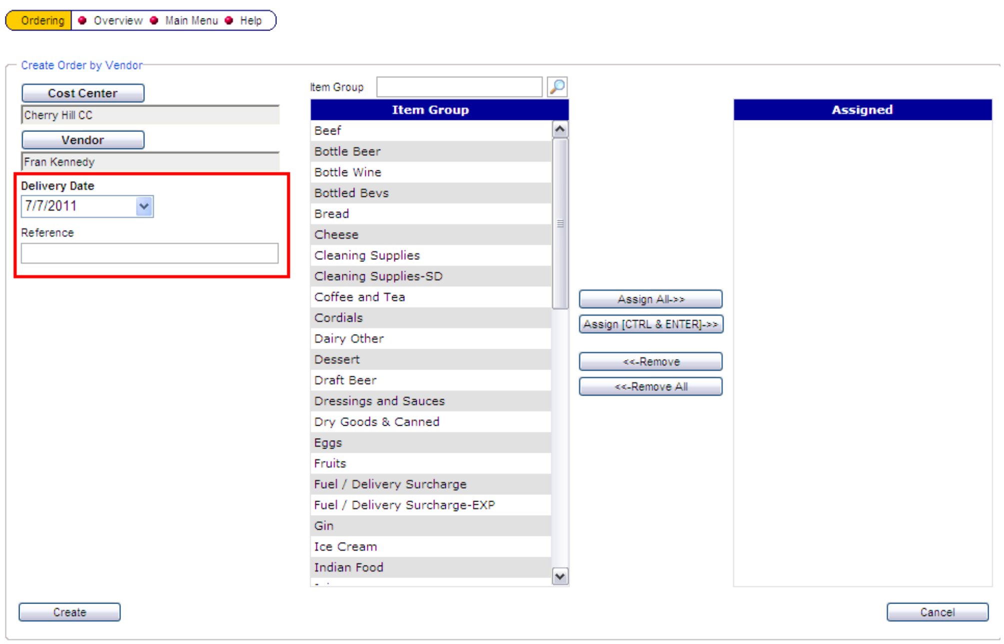
1. Select Vendor from the Ordering Overview window:



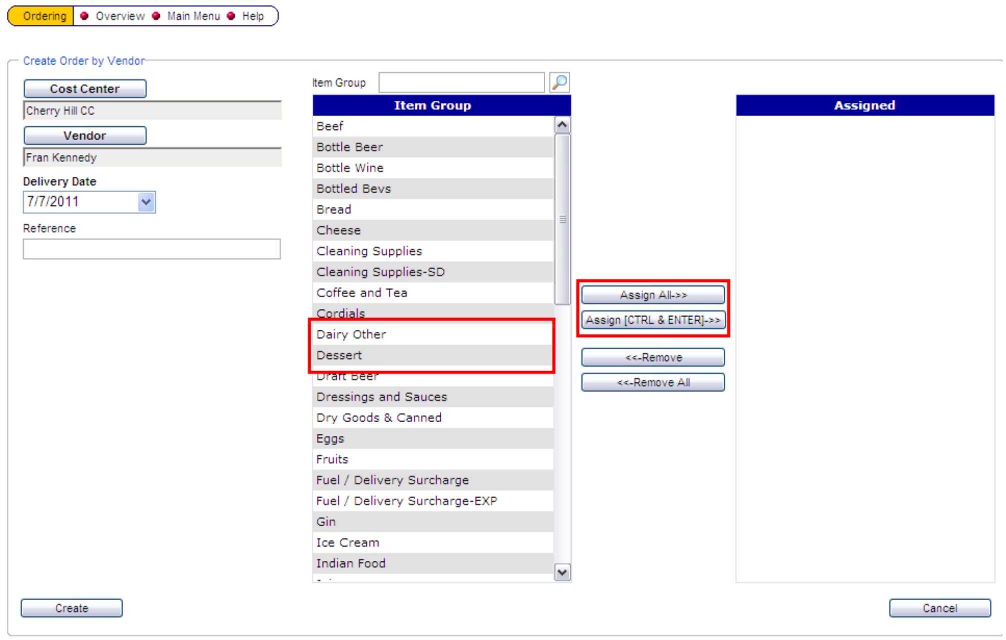
2. Select a Cost Center and a Vendor:



3. Enter a Delivery Date and any pertinent information in the Reference field:



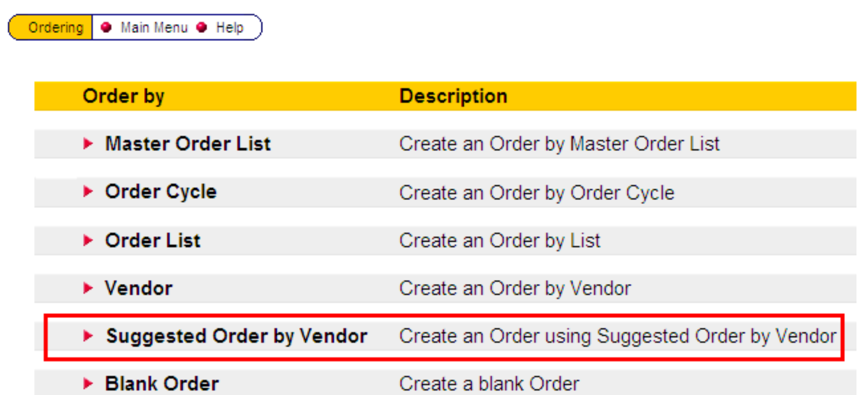
4. Select the Groups from the Item Group column (use CTRL to select more than one) and click Assign



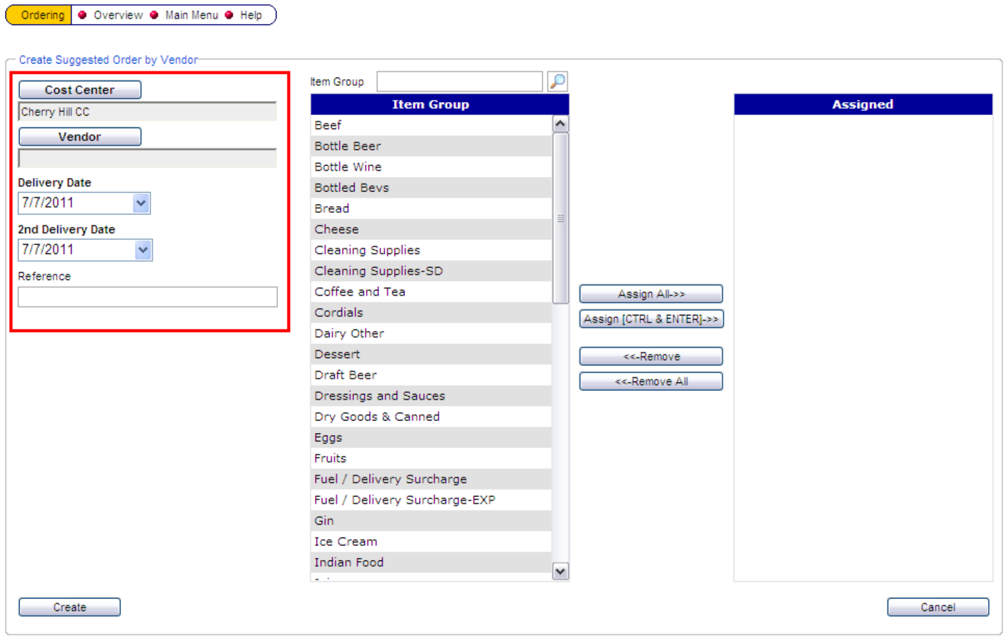
5. When complete, click Create
6. You will be taken to the Purchase Order Detail Page:

Order by Suggested Order Qty

1. Select Suggested Order Qty from the Ordering Overview window:

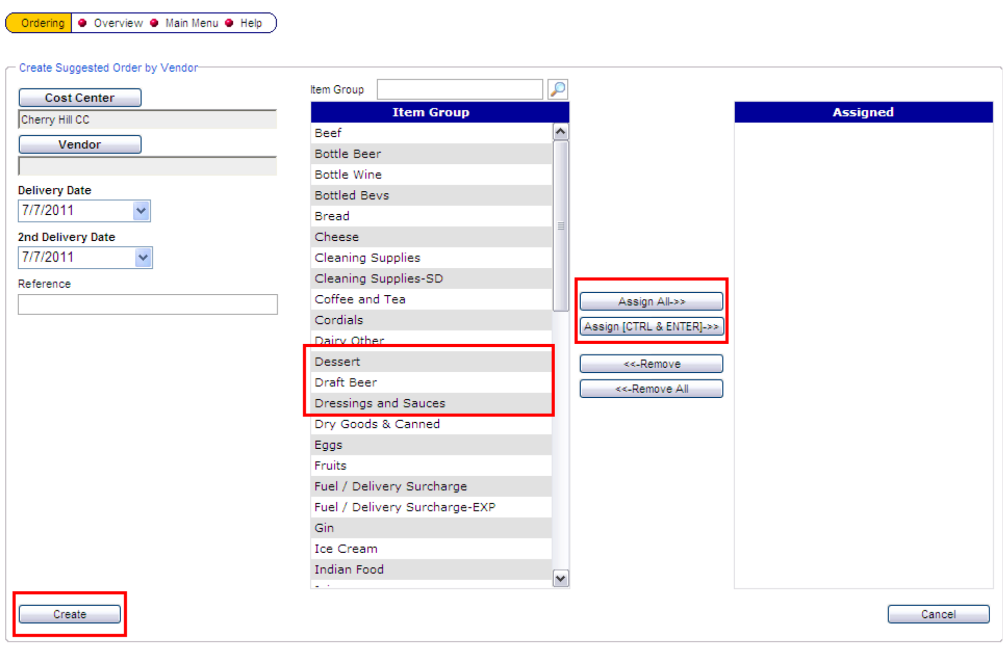


2. Select a Cost Center and a Vendor:



3. Modify the Delivery Dates and enter any pertinent information in the Reference field

4. Select an Item Group (hold CTRL for more than one selection) and click Assign:

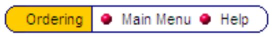


5. When you have finished, click Create

You will be taken to the Purchase Order Detail window.

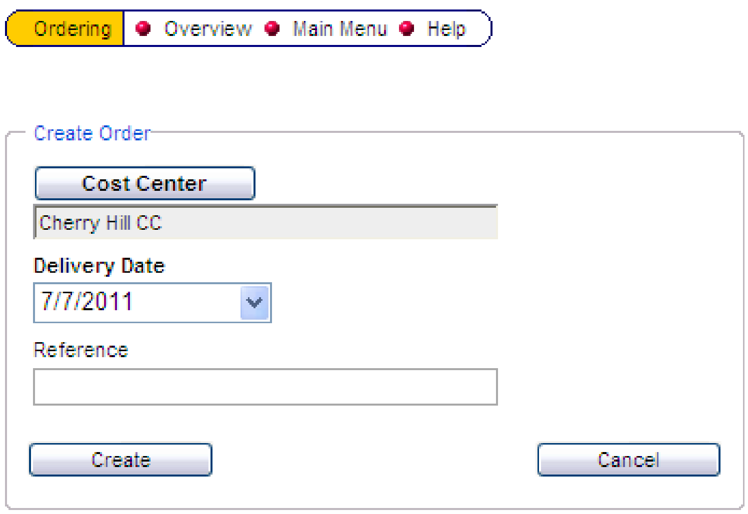
Order by Blank Order

1. Select Blank Order from the Ordering Overview window:



Order by	Description
Master Order List	Create an Order by Master Order List
Order Cycle	Create an Order by Order Cycle
Order List	Create an Order by List
Vendor	Create an Order by Vendor
Suggested Order by Vendor	Create an Order using Suggested Order by Vendor
Blank Order	Create a blank Order

2. Select a Cost Center and enter a Delivery Date and any pertinent information in the Reference field and click Create



3. From the Purchase Order Detail window, begin adding items as necessary

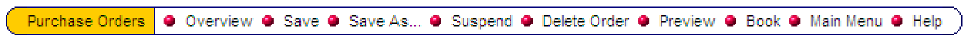
The Purchase Orders Detail Window

While in the Purchase Orders Detail window, you can modify the Order, add Items, adjust quantities, and save or suspend the Order.

Once all changes have been made, save or suspend the Order. Save will keep you in the Purchase Orders Detail Window, whereas Suspend will return you to the Ordering Overview Window

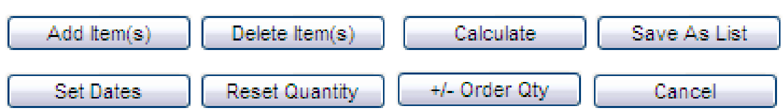
The following section describes the Purchase Orders Detail Window. You ‘build’ your Orders using this window.

Top Menu Bar



Menu Item	Description
Overview	Go to the subject area overview
Save	Saves the Order as is and keeps you in the Detail window to continue working on the Order
Save As...	Allows you to suspend the Order, rename it, and continue working on the Order under its new name
Suspend	This feature allows you to save the Order and returns you to the Overview window where you can continue working on this suspended Order at another time. Suspended Orders are highlighted with the color green
Delete Order	This deletes the current Order completely and returns you to the Overview window
Preview	Allows you to preview and print your Order before booking
Book	Finalizes the Order by creating a Purchase Order that is available for printing or electronic submission to the Vendor
Main Menu	Return to the Main myinventory Menu
Help	Launch the Help file

Additional Screen Elements



Screen Element	Description
Add Item(s)	Use this to add Items to the Ordering Detail window
Delete Item(s)	To use this option, first select an Item or Items by checking the box to the left of the Item. Then, click Delete Item(s) to delete the Item(s) from your Order
Calculate	Use this whenever you would like a Total for your Order to be display at the bottom of the Detail grid

Screen Element	Description
Save As List	Use this to save the Order you are working on for future use as a List. This list will show up on the Purchase Order Overview window and will be highlighted with the color blue. Creating Order Lists will speed up the process of Ordering so you will not have to start new each time
Set Dates	This will allow you to set all of the delivery dates for the Items on the Order that you are currently working on
Reset Quantity +/- Order Qty	These features may or may not have any affect on your Order quantities; however, if you are set up by your system administrator to use these Order quantity calculation features, then Reset Quantities will reset your Items according to the original suggested levels. The +/- Order Qty will increase/decrease your Order by a percentage with respect to Suggested Ordering
Cancel	Cancels the Purchase Order, but does not delete it

Information Bar

Screen Element	Description
Vendor No.	Displays the Vendor Item number
Item	Displays the name of Item
Unit	Displays the Purchase Unit of Measure for this Item
Qty	Enter a value here to change the Quantity of the Item to be Ordered
Weight	Displays the Weight of the Item
On Hand	Displays the current Stock on Hand
On Order	Displays the quantity of the Item that is currently on another Purchase Order
Delivery Date	Displays the date the Item will be delivered
Vendor	Displays the Vendor
Re...	This column is used to display information for the Item. A red “i” indicates that information has been entered for that Item. Clicking on a black “i” allows you to add information for that Item

Adding Items to an Order

To add, please refer to the Add Items Section of this document.

Tips & Tricks *MICROS recommends adding by Item Group whenever possible. This method saves times and allows you to add multiple Items at a time, rather than only one Item at a time*

Deleting Items from an Order

To delete, please refer to the Delete Items section of this document.

Set Dates

If a Cost Center uses multiple Vendors, setting dates may be an invaluable function. It allows you to assign different delivery dates for different Vendors. This feature is turned on in Settings under the Maintenance Module. Depending on User Rights, a User may or may not be able to access or use these features. To set dates (if feature is available):

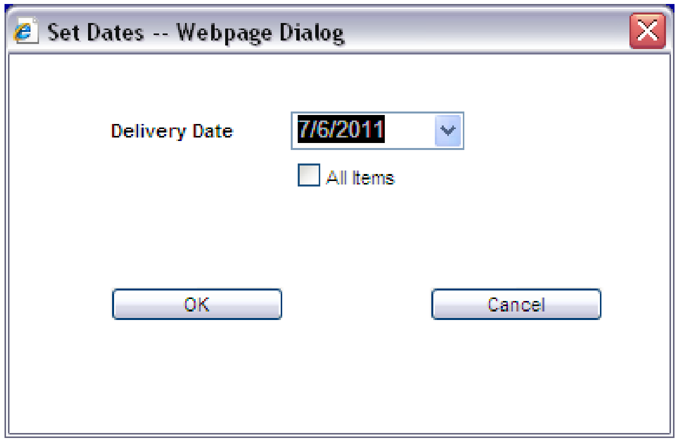
1. Search for and select the desired Order
2. Select the check boxes next to the Items that will have the date set for them

✓	Vendor No.	Item	Unit
☑		Cheese Cream Cup	EACH
☑		Cheese Cream Orig Pouch	EACH
☑		Cheese Cream Plain Cup	EACH
☑		Cheese Crm Cup Grdn Veg	EACH
☐		Cheese Cube, Swiss/Pepper/Ched OZ	

Note *For all Items, you may select the check above the column of check boxes OR you may click Select Dates without any Items being selected. This enables all Items to be selected for the Set Date.*

3. Select Set Dates

4. From the Set Dates window, select a delivery date from the drop-down list



5. Click OK

The delivery date will be set according to your preferences.

Reset Item Quantities

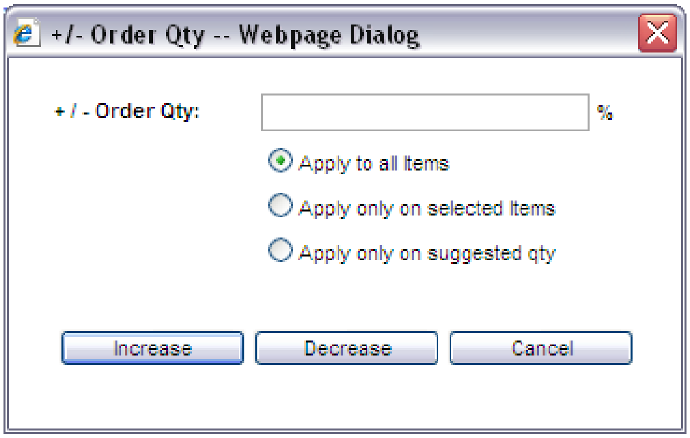
If you have begun an Order using Suggested Ordering, you may reset the quantities to the original suggested levels by clicking the Reset Quantity button. This feature is also helpful if you have entered any quantities incorrectly, and you would like to start over. To reset Item quantities:

1. Click the Reset Quantities button
2. Click OK if you would like to reset to system calculated quantities, or 0 (zero) if Suggested Ordering is not being used.

+/- Order Quantities

For Orders begun using Suggested Ordering, you may increase or decrease the Suggested Order quantity based on percentages of the actual usage. This feature is ONLY available when Suggested Ordering has been used. To use this feature, from the Order Detail screen:

1. Click the +/- Order Qty button.



Note	*Use this only on Suggested Orders; otherwise, the list will always reset all quantities to zero*

2. Enter the percentage you want to increase (or decrease) the Order by
3. Determine if the increase (or decrease) will be applied to all Items, the Items selected, or only Items that have a suggested quantity
4. Click increase (or decrease)
5. Click OK. Your order has been increased (or decreased) by the percentage entered.

View Orders

You also have the ability to view all Purchase Orders of various statuses. The steps for viewing either Suspended Orders or Booked Orders is the same (depending on which Order type you select, suspended or booked, you will have different results). The steps for viewing an Open Purchase Order vary slightly.

View Suspended/ Booked Orders

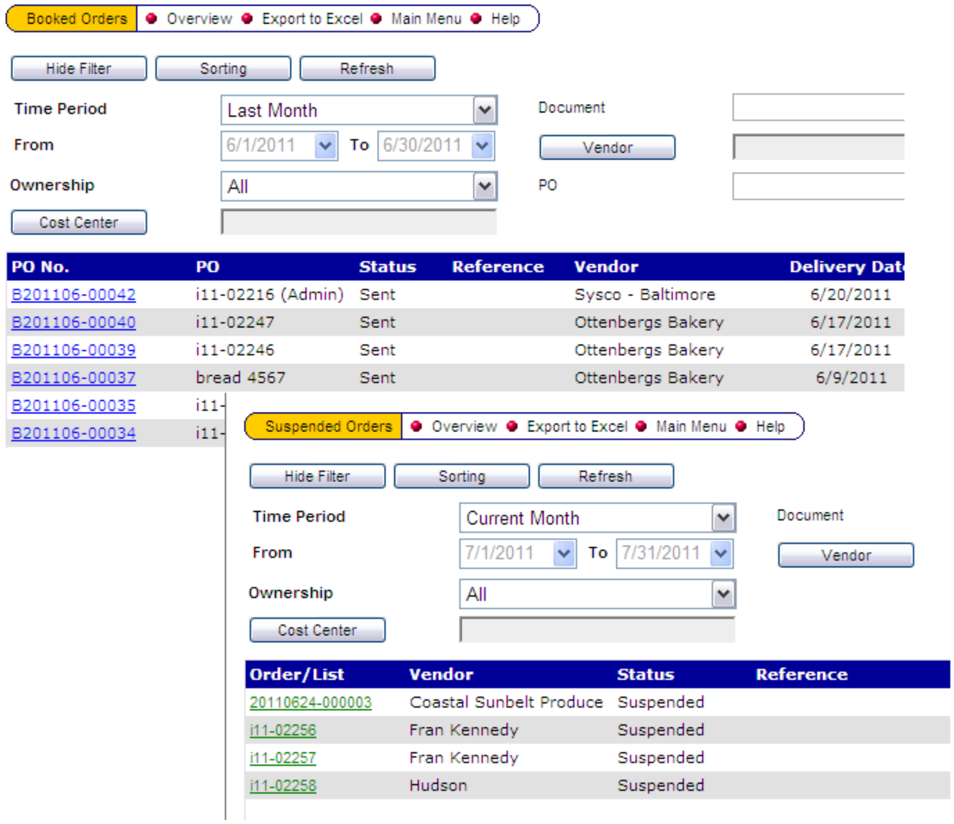
1. Select the Suspended or Booked Orders option from the Ordering Overview window

Ordering • Main Menu • Help

Order by	Description
Master Order List	Create an Order by Master Order List
Order Cycle	Create an Order by Order Cycle
Order List	Create an Order by List
Vendor	Create an Order by Vendor
Suggested Order by Vendor	Create an Order using Suggested Order by Vendor
Blank Order	Create a blank Order

View Orders	Alerts	Description / Status
Suspended Orders	8	View Suspended Orders
Open Purchase Orders	6	Open Purchase Order(s)
Pending Orders	2	View Pending Orders
Booked Orders		View Booked Orders

2. Select the Purchase Order number:

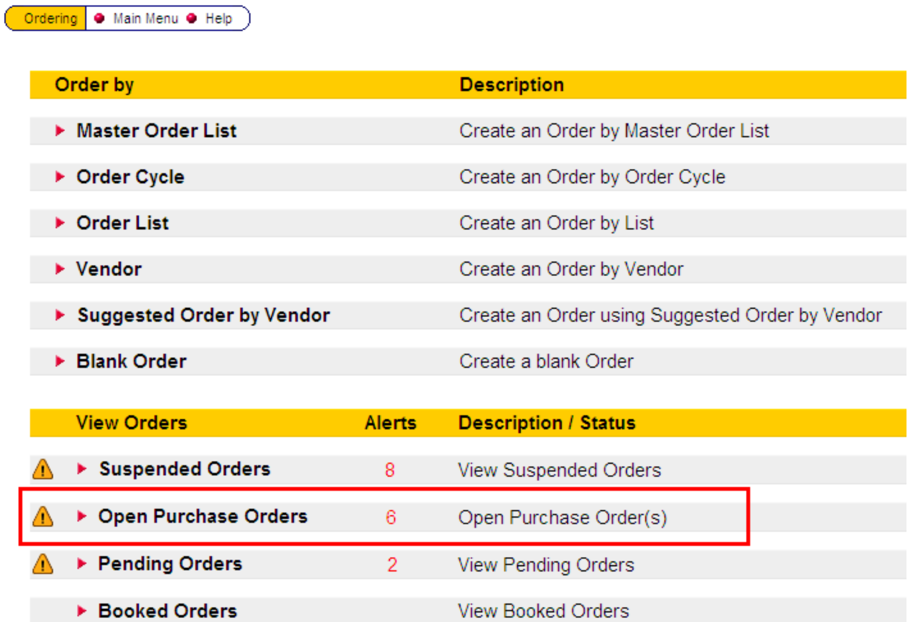


a. If you have selected a Booked Purchase Order, then a PDF file will open so that you may print it out

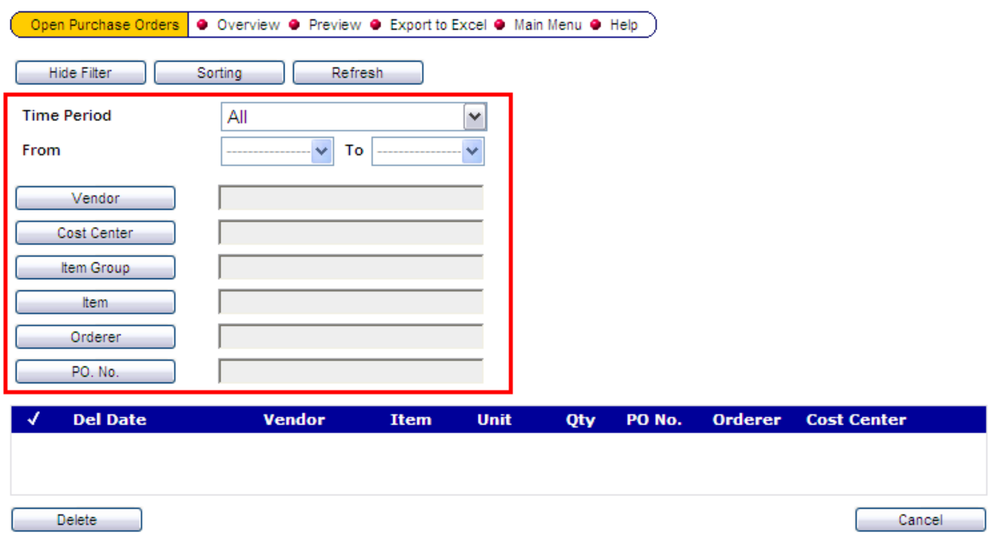
b. If you have selected a Suspended Order, the Purchase Order Detail page will appear where you can modify, save, and/or book as necessary

View Open Purchase Orders

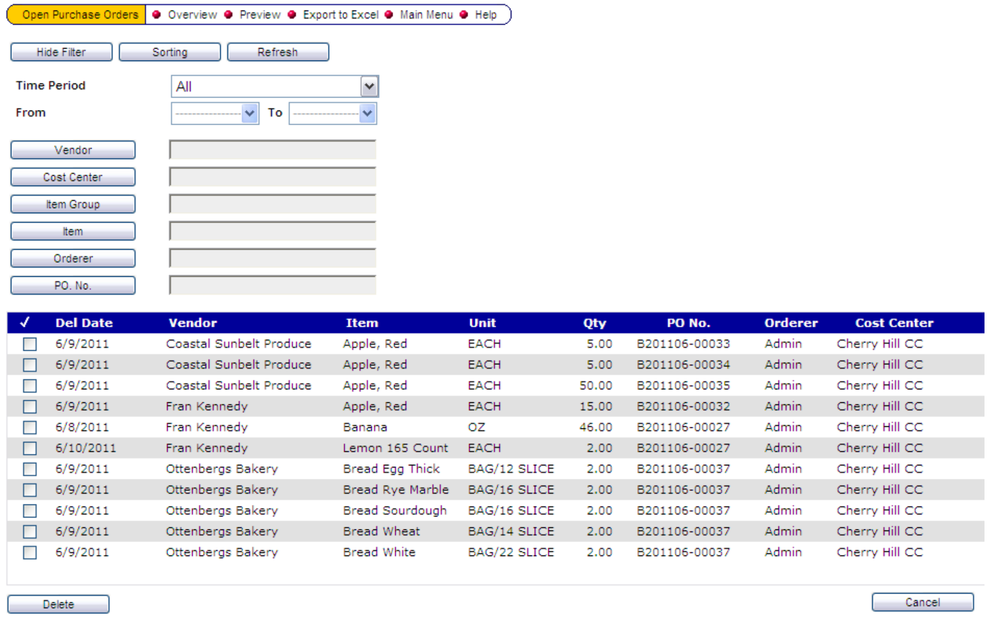
1. Select Open Purchase Orders from the Ordering Overview window



2. Use the filters to specify which Open Purchase Orders you would like to view, and then click Refresh



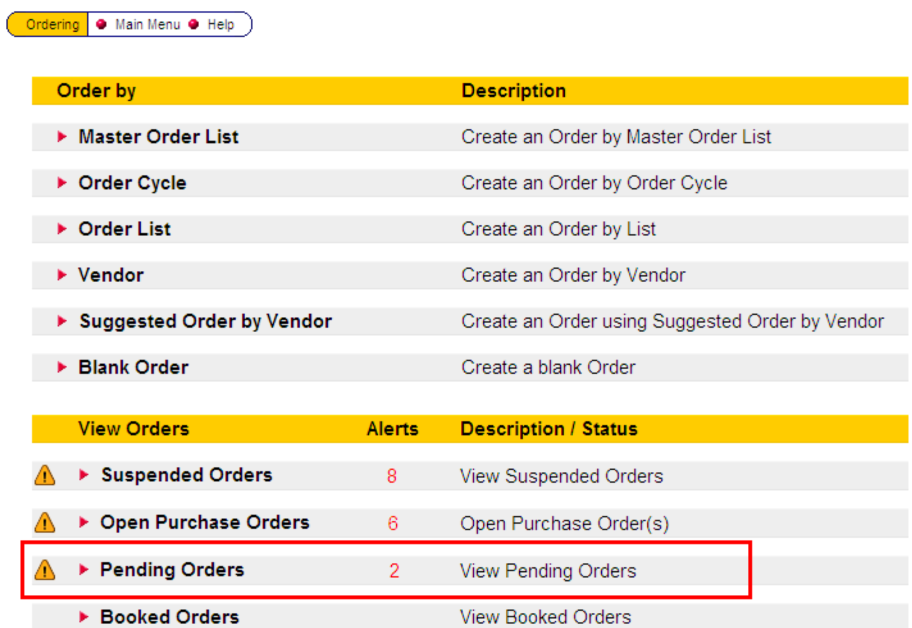
3. Results matching your criteria will appear



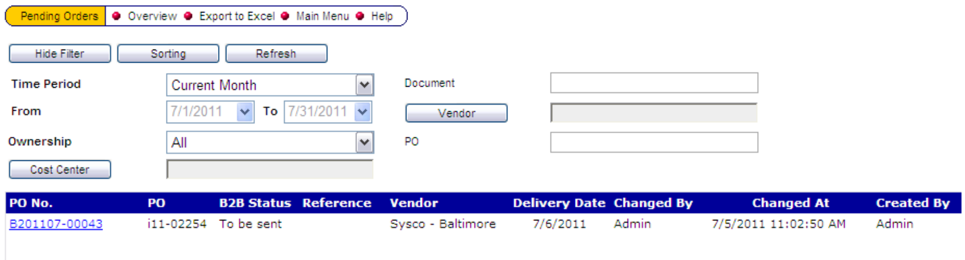
View Pending Orders

Pending Orders are Orders that have not yet been sent to the Vendor using a B2B interface. They are closed Purchase Orders, therefore may not be edited. To view Pending Orders:

1. Select Pending Orders from the Purchasing Overview window:



2. Select the Purchase Order number:



3. A PDF will be opened, displaying the Purchase Order information

Book an Order

After you have created an Order and are ready to finalize it, you can book the Order:

1. From the Purchase Orders Detail window, click Book from the Top Menu Bar.

Note

1. *Make sure the delivery date is in the present or future; otherwise, the Order will not be booked*
2. *Once you book an Order, you cannot UN-book it.*

3. Click OK from the next dialog box

A booking confirmation page will appear with Purchase Order (PO) numbers, Vendor information, delivery dates, and the cost for the Order.

Receiving

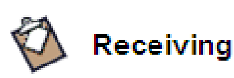
Introduction and Overview

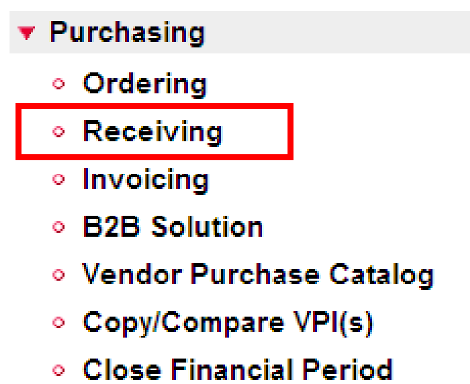
Product receiving and delivery approval are handled very efficiently within myinventory. The system recalls the Purchase Order created during the Ordering process, allowing Item by Item verification. Depending on various security and Vendor option settings, modifications can be made to reflect changes to quantities received and currently invoiced prices. Information from this process updates Stock on Hand reporting in real time.

If an operator chooses not to use the myinventory Ordering Module for acquisition of goods, the Receiving process can also function just as effectively. Rather than having a pre-established Order to confirm, the operator follows the same process of creating a list of Items, and establishing quantities and prices for the delivery being Received.

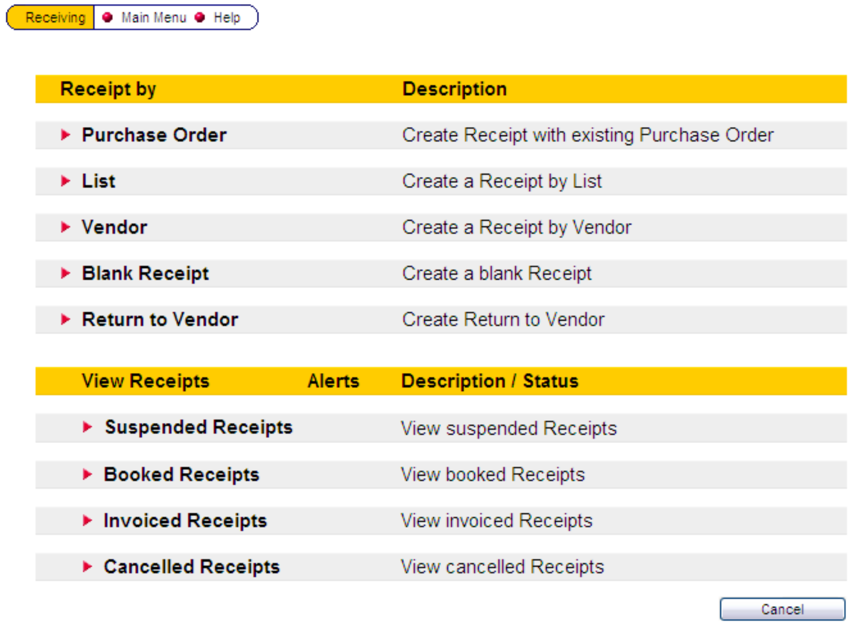
Accessing the myinventory Receiving Module

To access the Receiving module, from the Main Menu, click the Receiving icon or select Purchasing | Receiving





The Receiving Overview Window



From this window, you can create a Receipt from a Purchase Order, begin working on a Receipt from a pre-established List and create a Blank Receipt. You can also view Receipts that have already been booked or invoiced.

Create a Receipt

There are various ways of creating a new Receipt. You can create a new Receipt by:

1. Purchase Order
2. List
3. Vendor
4. Blank Receipt

You can also create a Return to Vendor.

Tips & Tricks

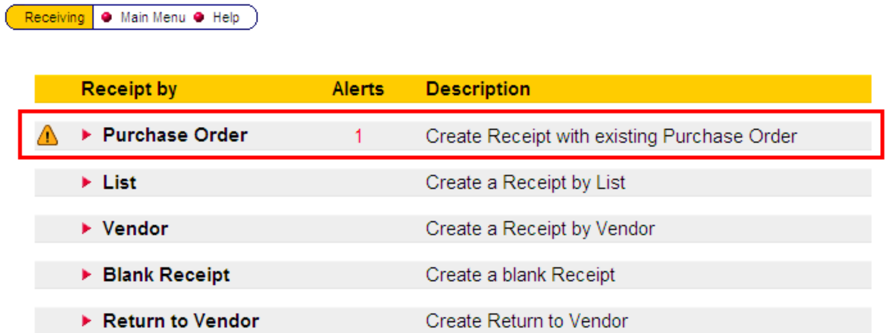
MICROS recommends creating a Receipt from a Purchase Order (PO) whenever possible to save time. If a site is not using Ordering, then create a Receipt from a List.

Ordering Lists = Receiving Lists except Lists that contain more than 1 Vendor - those are only visible during Ordering. The User is able to Order from multiple Vendors at a time. However, the User is only able to Receive from one Vendor at a time.

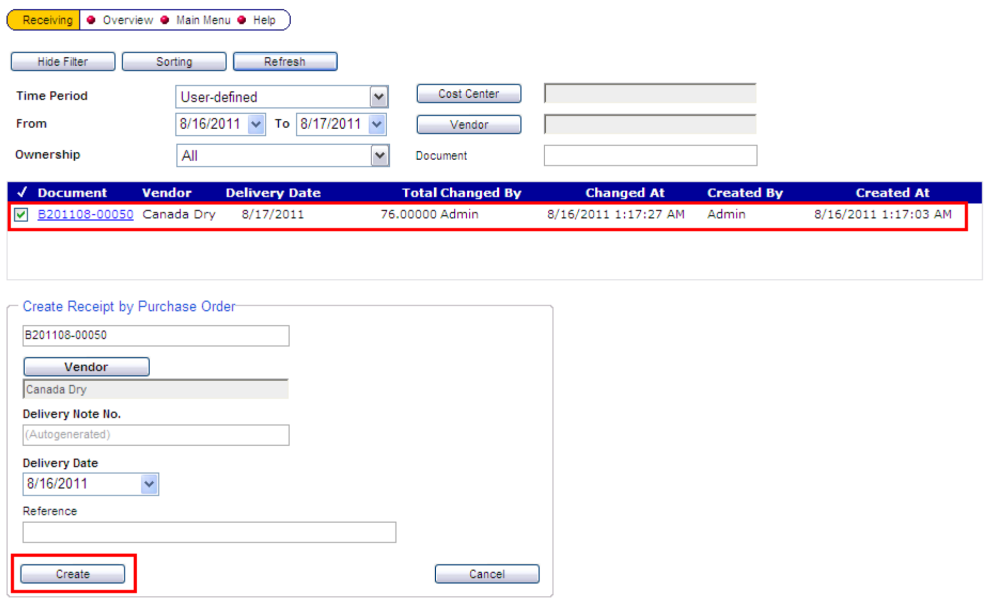
Creating a Receipt by an Existing Purchase Order

To create a new Receipt by Purchase Order:

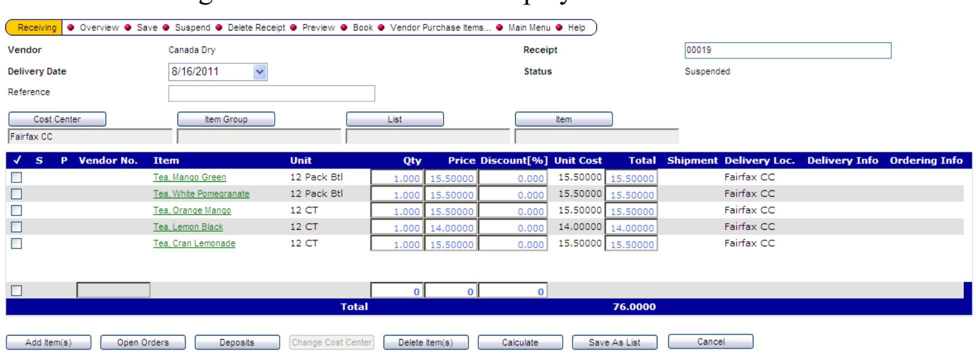
1. Select Purchase Order from the Receiving Overview window:



2. Select the box next to the Purchase Order Number that you would like to base your Receipt upon, enter a Delivery Note No. and click Create:



3. The Receiving Detail window will be displayed:



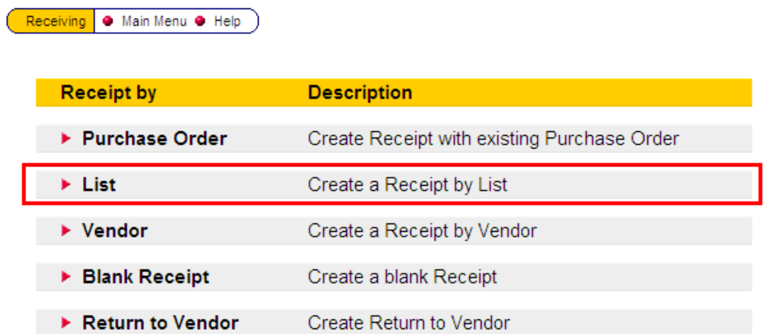
While in the Receiving Detail window, you can modify the Receipt, add Items, adjust quantities, and save or suspend the Receipt.

4. Click Save/Book when you are finished

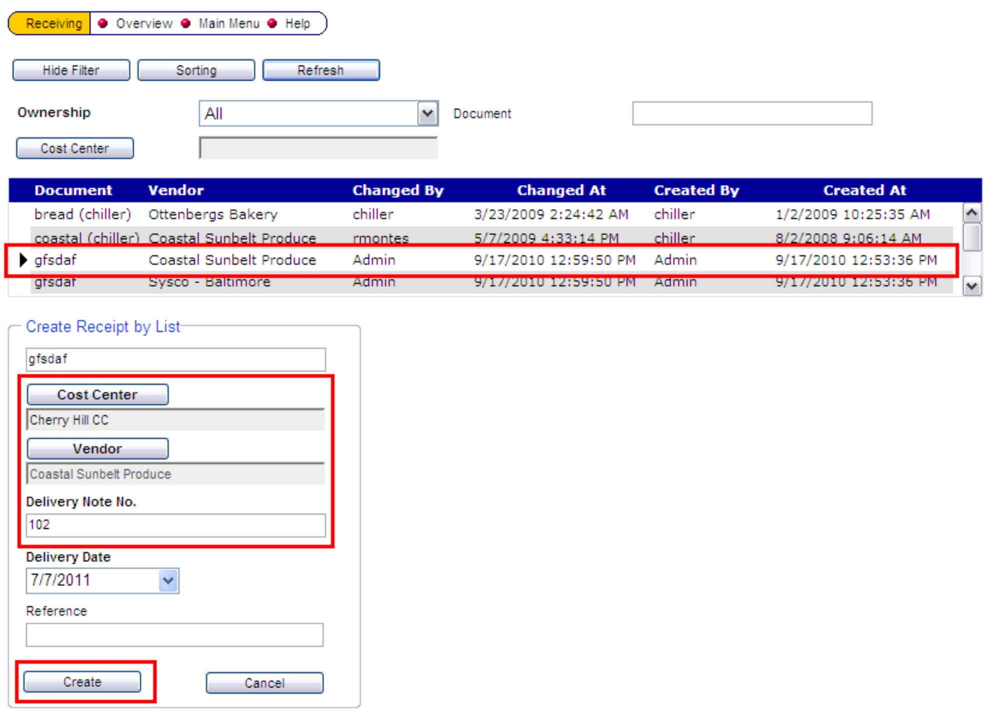
Create a New Receipt from a List

To create a Receipt from a pre-existing List.

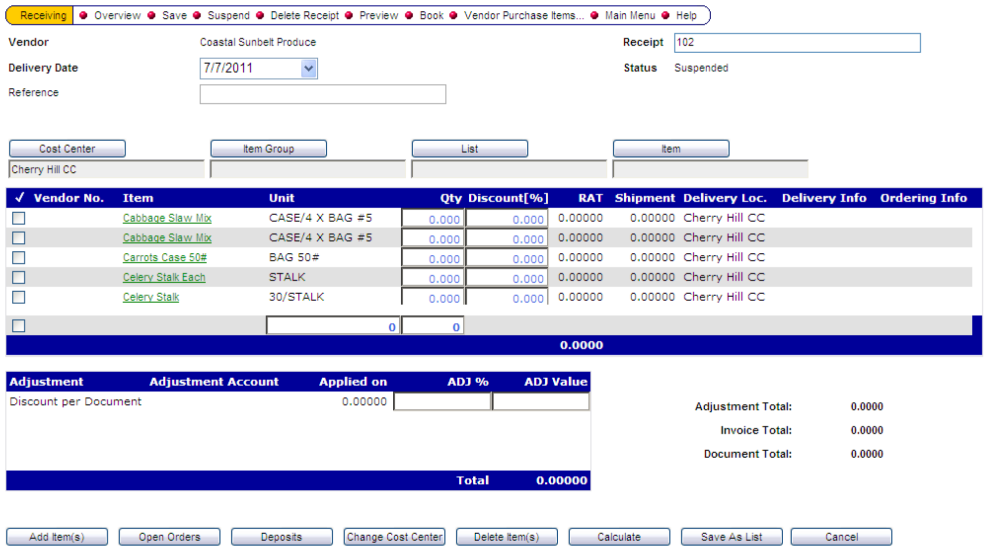
1. Select List from the Receiving Overview window:



2. Select a List by clicking on its name in the Document Column, enter a Cost Center and a Delivery Note No. and click Create:



The Receiving Detail window will be displayed, pre-populated with the Items previously saved in the List:

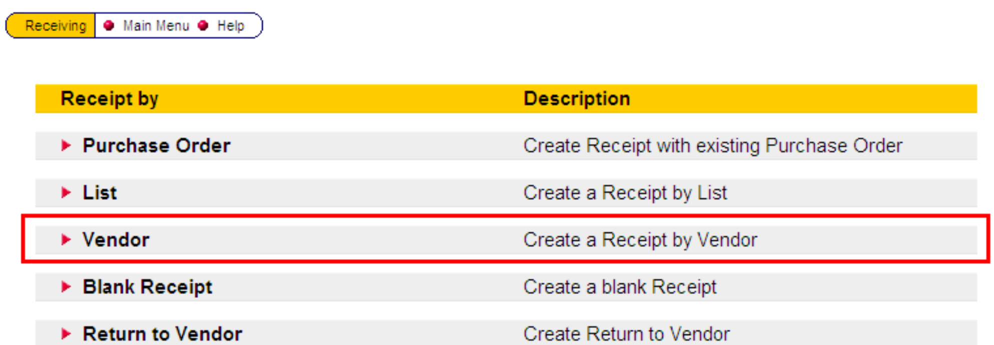


3. You may now add, remove, or modify Items on the Receipt
4. Click Save/Book when you are finished

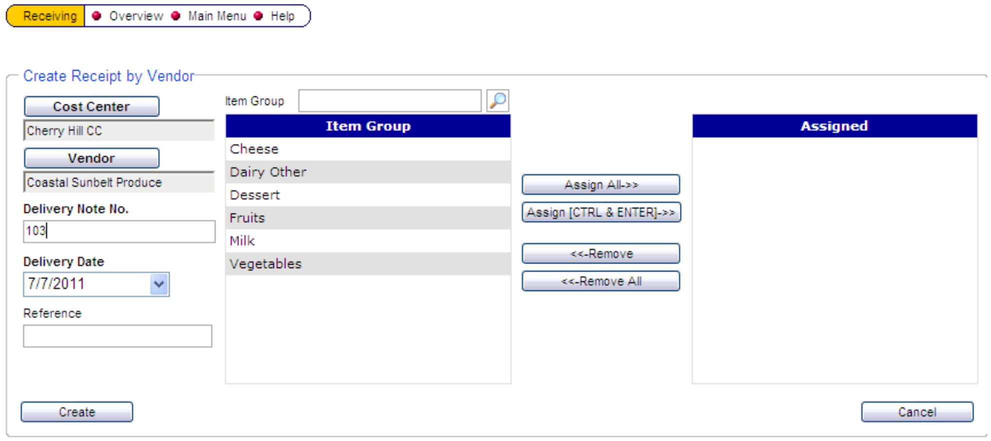
Create a Receipt from a Vendor

To create a Receipt from a specific Vendor:

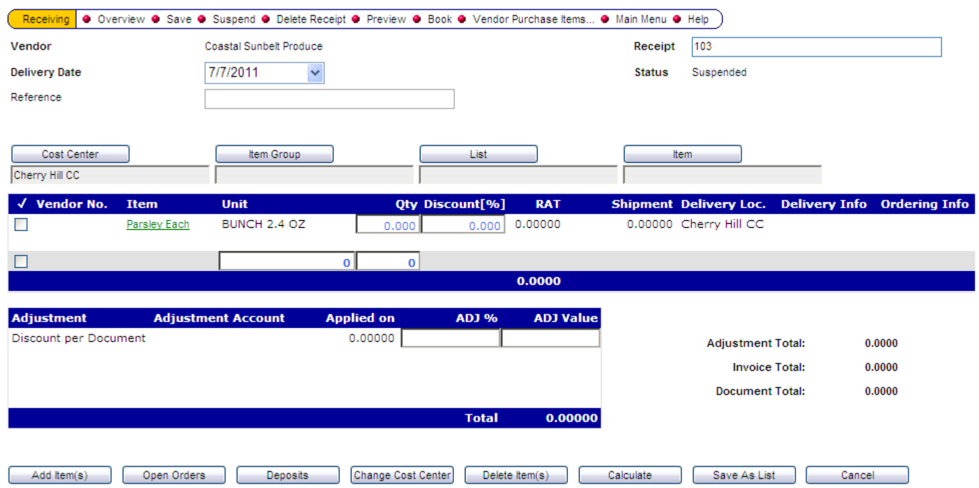
1. Select Vendor from the Receiving Overview window:



2. Select a Vendor, enter a Delivery Note No., assign Item Groups and click Create:



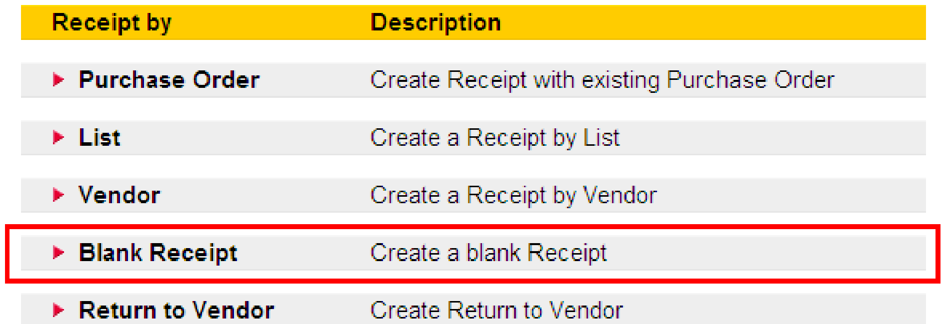
3. The Receiving Detail window will be displayed with Items from the Item Groups that were assigned:



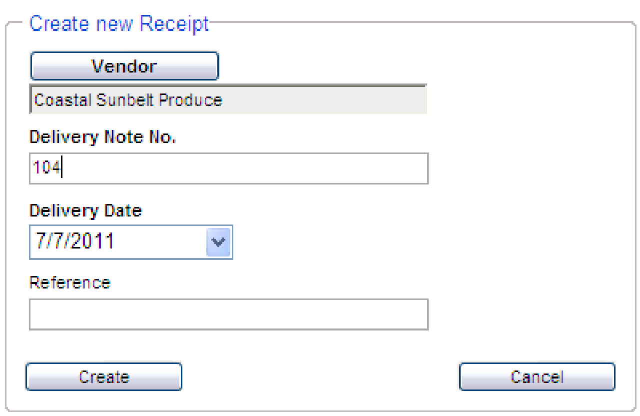
4. Enter quantities for the necessary Items and select Save/Book

Create a Blank Receipt

1. Select Blank Receipt from the Receiving Overview window:



2. Select a Vendor and enter a Delivery Note No., Delivery Date and any pertinent information in the Reference field and click Create:

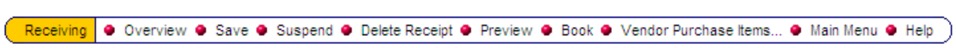


3. The Receiving Detail page will be displayed
4. Begin adding Items as necessary
5. Click Save/Book when you are finished

The Receiving Detail Window

The following section describes the Receiving Detail window.

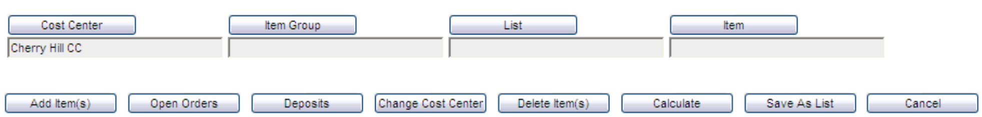
Top Menu Bar



This Top Menu Bar is described in the table below. Click on the label/link that you wish to use. This Top Menu Bar is consistent throughout the module, with only subtle differences.

Menu Item	Description
Overview	Go to the subject area overview
Save	Saves the Receipt as is and keeps you in the Detail window to continue working on the Receipt
Suspend	Allows you to save the Receipt and returns you to the Overview window where you can continue working on this suspended Receipt at another time. Suspended Receipts are identified by the color green
Delete Receipt	Deletes the current Receipt completely and returns you to the Overview window
Preview	Allows you to preview and print out your Receipt before booking
Book	This will book the Receipt
Vendor Purchase Items…	This feature will open the Vendor Purchase Catalog so you may add a Vendor Purchase Item (VPI) for one of your Purchase Items, if necessary. You will not need to Save or Suspend your current Receipt, since you will be returned to where you left off when you have completed entering the VPI
Main Menu	Return to the Main myinventory Menu
Help	Launch the Help file

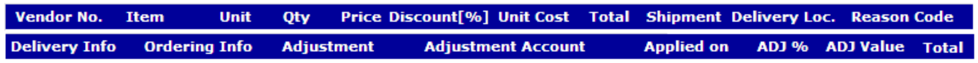
Additional Screen Elements



Screen Element	Description
Cost Center	Enter a Cost Center when using the Quick Entry function. The Item(s) added during Quick Entry will be Received for this Cost Center
Item Group	To narrow the search for Items using Quick Entry, enter an Item Group in this field. Only Items belonging to that Group will be available in the Item Quick Entry field

Screen Element	Description
List	To narrow the search for Items using Quick Entry, enter a List in this field. Only Items belonging to that List will be available in the Item Quick Entry field
Item	Search for an Item in this field for Quick Entry onto the Receipt
Add Item(s)	Use this to add Items to the Receiving Detail window
Open Orders	Use this to see all Open Orders for the specific Vendor that you have already chosen. At this point, you can choose to save one or all of the Open Orders to the Receipt Detail window so you can Receive those Orders with ease
Deposits	Use this to initiate the Deposits pop-up window. This pop-up window will allow you to view all possible Deposit Items within your Receipt. At this point, you may adjust the quantity of Deposits being delivered or returned to the Vendor
Change Cost Center	Use this to change the Cost Center. You can change the Cost Center for all Items or only selected Items. You can Receive for more than one Cost Center at a time. Even though you can Order under a statistical location, you might have to change the Receiving location since you can only Receive for a valid Cost center, not a statistical location
Delete Item(s)	Use this to delete a selected Item from the Receipt
Calculate	Calculate the value of the Receipt as you add Items
Save As List	Use this to keep the Receipt you are working on for future use as a List. This List will show up on the Receiving Overview window and will be highlighted with the color blue. You can select a List to begin creating an Order that is pre-established or routine. Ordering and Receiving Lists are similar, except for Orders with multiple Vendors. In the event that an Order is created with multiple Vendors, that Order will be unavailable for use as a template for creating a Receiving list
Cancel	Use this to return to the Receiving Overview window. It will also Suspend the Receipt

Information Bar

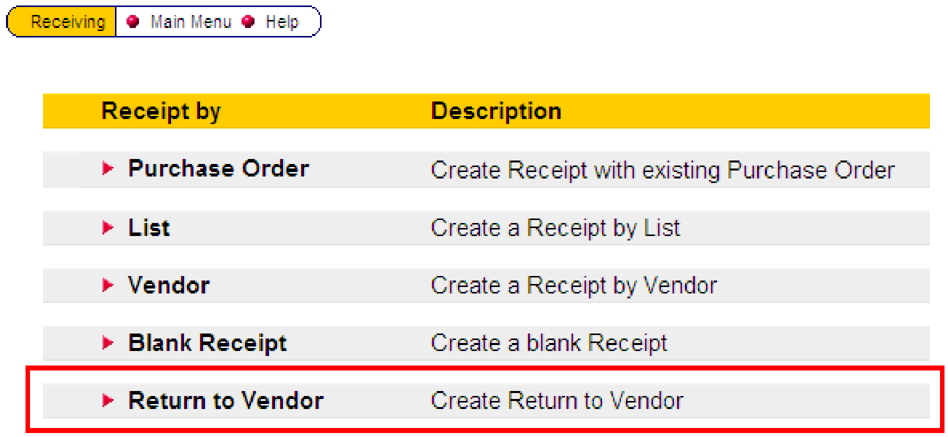


Screen Element	Description
Vendor No.	Displays the Vendor Item Number
Item	Displays the Item Name
Unit	Displays the Unit of Measure
Qty	Displays the quantity of the Item on this Receipt. This can be changed if different from original Order
Price	Displays the price of the Item
Discount [%]	Displays the discount percentage. This can be changed if different from original Order
Unit Cost	Displays the cost of the Item's Unit
Total	Displays the Item's Total price
Shipment	Displays any Shipment Adjustments for the Item
Delivery Loc.	Displays the Cost Center that Received the Item
Reason Code	Used in conjunction with Vendor Ratings. Indicates why the Vendor Item received a Rating
Delivery Info	Displays information regarding Vendor ratings, if they are implemented
Ordering Info	Displays any information for the Item that was entered on the Purchase Order
Adjustment	Displays the type of Discount being applied to the Receipt
Adjustment Account	Displays the Discount Account
Applied on	Displays the total value of the Receipt that the Discount is being applied to
ADJ %	Displays the percent of the total that the Discount represents
ADJ Value	Displays the total value of the Discount
Total	Displays the total value of all Discounts

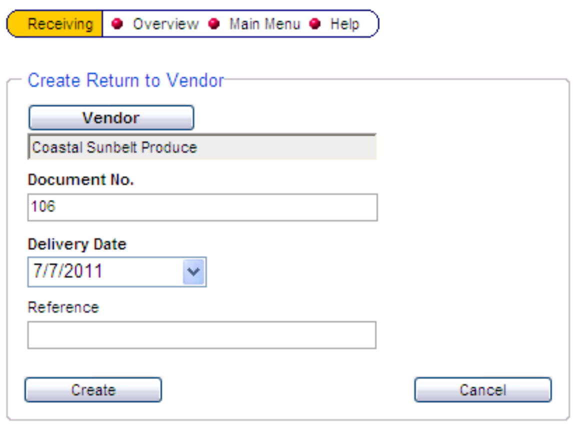
Create a Return to Vendor

In the event that you wish to return a Receipt:

1. Select Return to Vendor from the Receiving Overview window:



2. Enter the Vendor, Document No and click Create:



3. From the Receiving Detail window, begin adding Items that will be returned to the Vendor
4. Click Save/Book

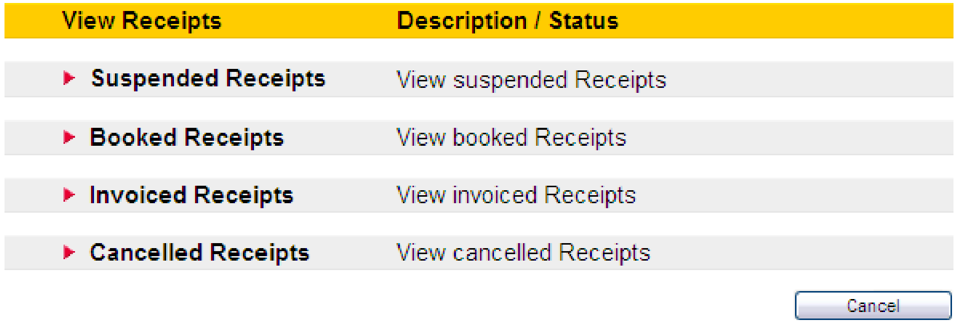
View Receipts

There are four viewing functions available in the Receiving module:

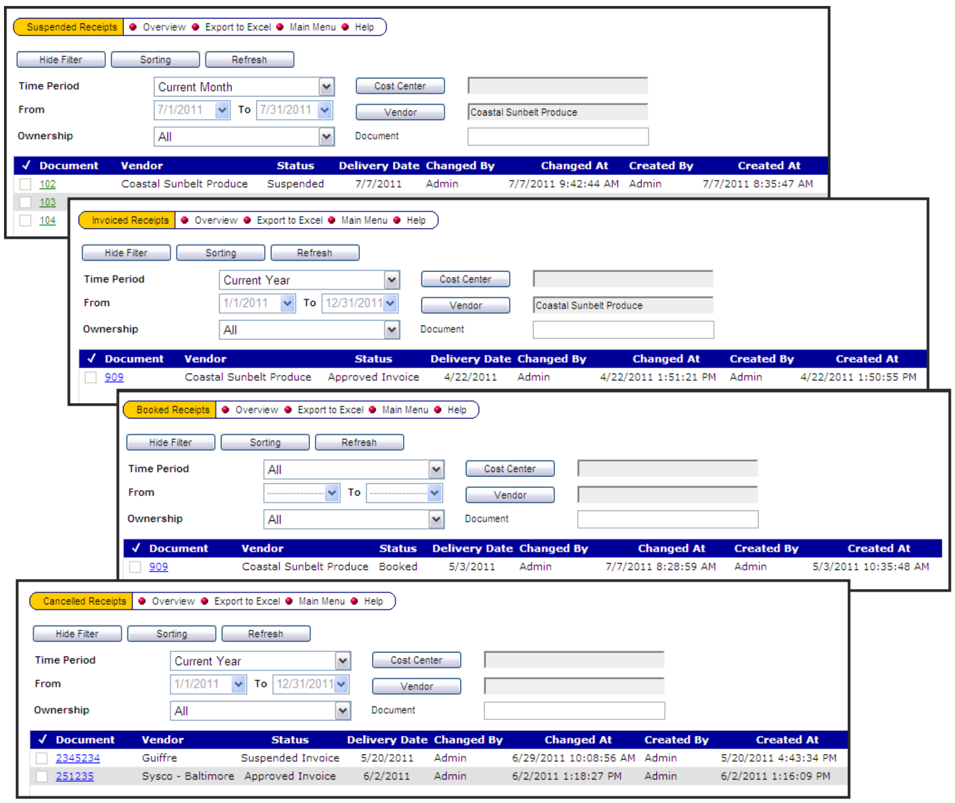
1. Suspended Receipts
2. Booked Receipts
3. Invoiced Receipts
4. Cancelled Receipts

Generally, the steps to view are the same; the Receipt type you select will obviously determine what types of Receipts you will view. To view a Receipt:

1. Select Suspended, Booked, Invoiced, or Cancelled from the Receiving Overview window:



2. Select a Document Name



3. The Receiving Detail window will be displayed with the Items contained in the Receipt; modify as necessary
4. When you are finished, click Save or Book

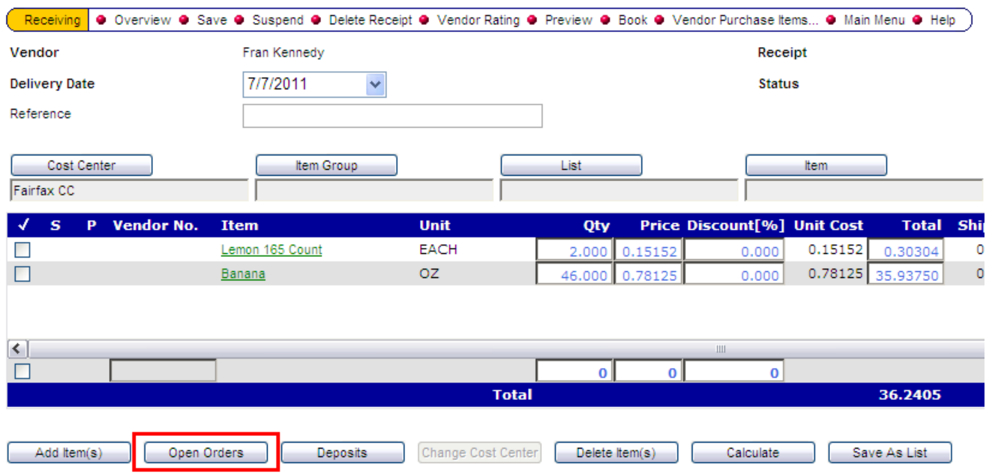
Add Items to a Receipt

To add Items, please refer to the Add Items section of this document.

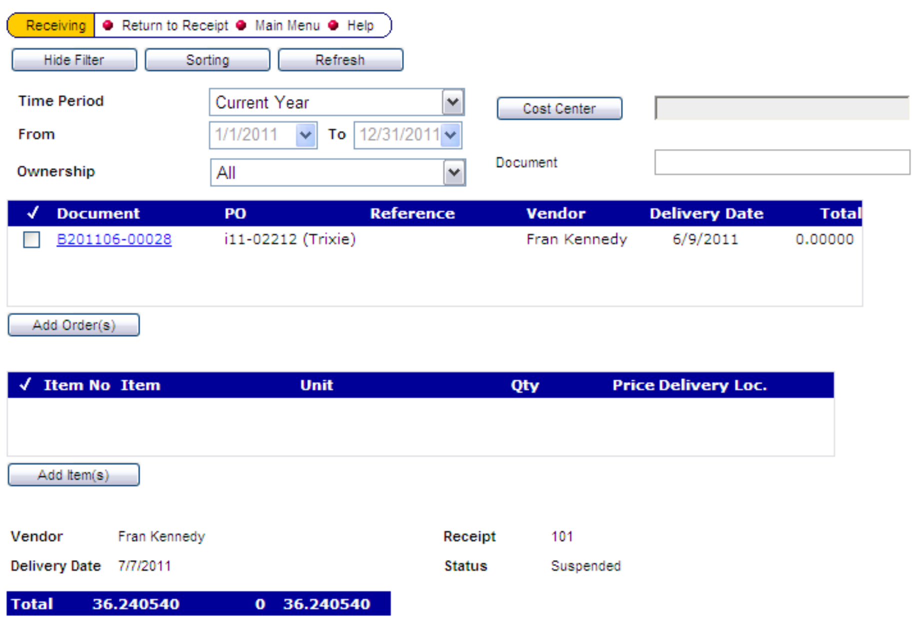
Add Open Orders to a Receipt

To add an Open Order to a Receipt:

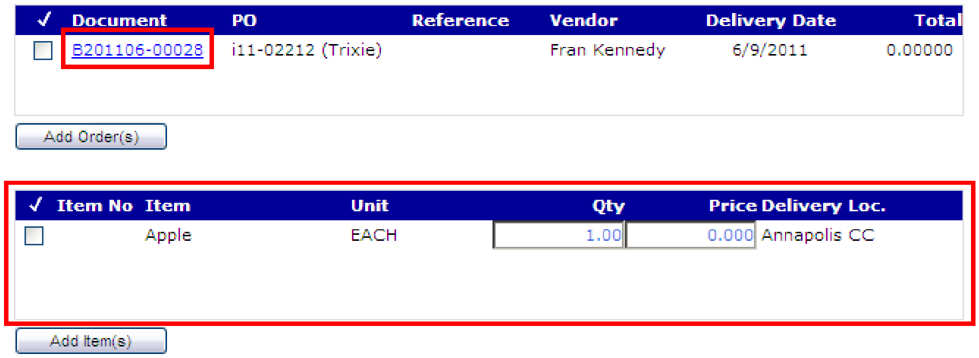
1. From the Receiving Detail window, select Open Order(s):



2. A screen will be displayed, from which you can select an Order to add to the Receipt. Use the filters to find the Order to be added:



3. To add an entire Order select the box to the left of the Order and click Add Order(s). More than one Order may be added at a time.
4. To view the Items included on an Order and add specific ones, click the Document link for the necessary Order; the Items will be displayed in the lower box:

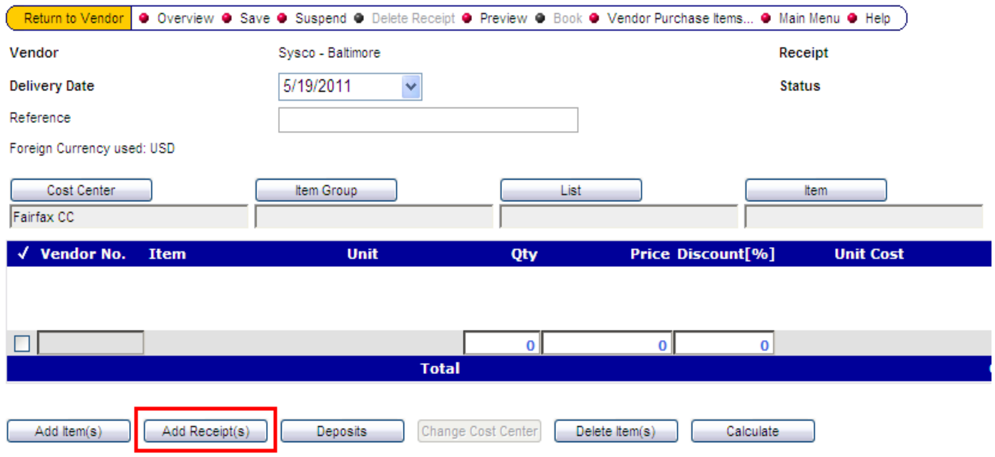


5. To add Items, select the box to the left of the Item and click Add Item(s). More than one Item may be added at a time.
6. When finished adding Orders and/or Items from Orders, select Return to Receipt from the Top Menu Bar.

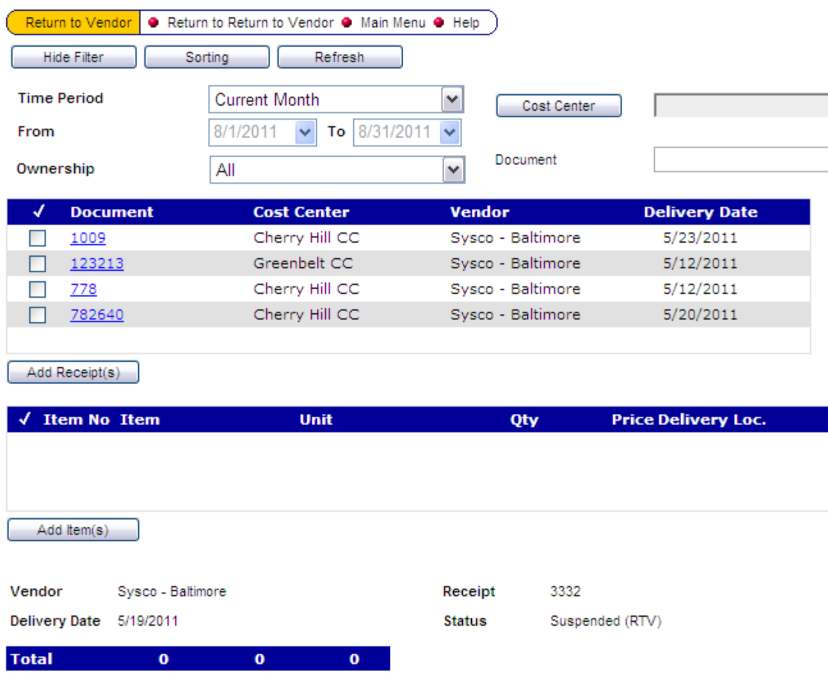
Add Receipts to a Return to Vendor

There may be occasions when an entire shipment must be sent back to the Vendor. To accommodate this, you may add entire Receipts to a Return to Vendor. This function decreases the time it takes to do a RTV for a large shipment because you can add all of the Items that were in the shipment to the Receipt at once, as opposed to keying them in manually. To add a Receipt to a Return to Vendor:

1. From the Return to Vendor Detail window, select Add Receipt(s):

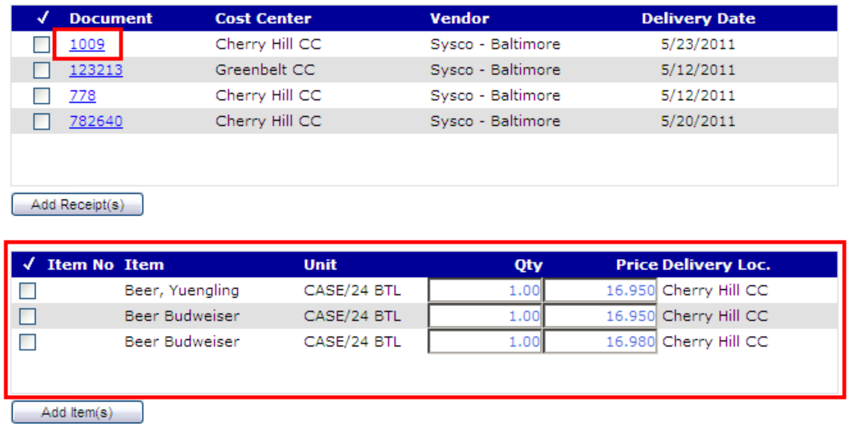


2. A screen will be displayed, from which you can select Receipts to add to the Return to Vendor. Use the filters to find the Receipt to be returned:



3. To add an entire Receipt, select the box to the left of the Receipt and click Add Receipt(s). More than one Receipt may be added at a time.

4. To view the Items included on a Receipt and add specific ones, click the Document link for the necessary Receipt; the Items will be displayed in the lower box:



✓	Document	Cost Center	Vendor	Delivery Date
☐	1009	Cherry Hill CC	Sysco - Baltimore	5/23/2011
☐	123213	Greenbelt CC	Sysco - Baltimore	5/12/2011
☐	778	Cherry Hill CC	Sysco - Baltimore	5/12/2011
☐	782640	Cherry Hill CC	Sysco - Baltimore	5/20/2011

Add Receipt(s)

✓	Item No	Item	Unit	Qty	Price	Delivery Loc.
☐		Beer, Yuengling	CASE/24 BTL	1.00	16.950	Cherry Hill CC
☐		Beer Budweiser	CASE/24 BTL	1.00	16.950	Cherry Hill CC
☐		Beer Budweiser	CASE/24 BTL	1.00	16.980	Cherry Hill CC

Add Item(s)

5. To add Items, select the box to the left of the Item and click Add Item(s). More than one Item may be added at a time.
6. When finished adding Receipts and/or Items from Receipts, select Return to Return to Vendor from the Top Menu Bar.

Deleting Items from a Receipt

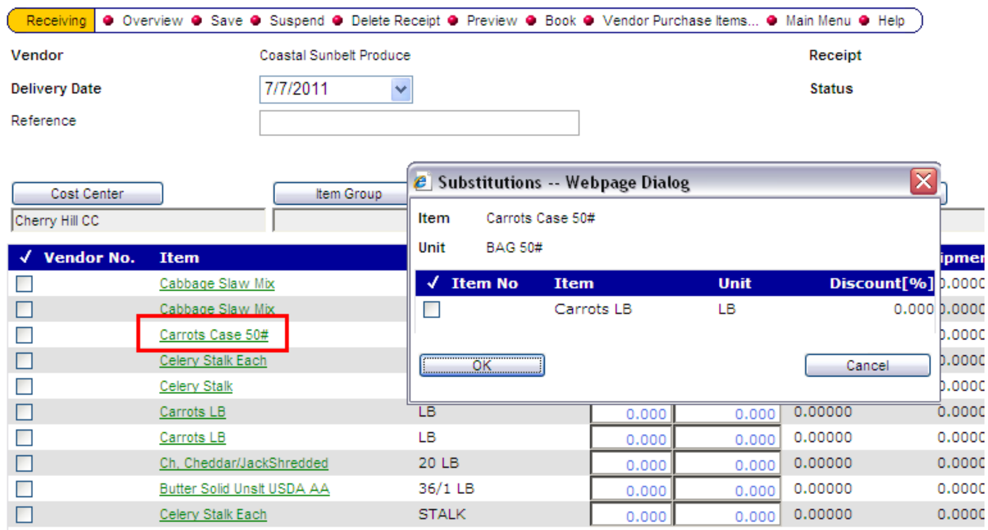
To delete Items, please refer to the Delete Items section of this document.

Substitutions on Receipts

There are times when the Vendor does not deliver exactly what has been ordered. For situations such as these, using the substitutions feature will allow you to accurately account for your inventory. myinventory makes it easy to substitute one brand for another or one case pack for another. To use substitutions:

1. From the Receiving Overview, select Suspended Receipts
2. Select a Document Name

3. Select the link for the Item that will be substituted – the Substitutions Pop-Up box appears:



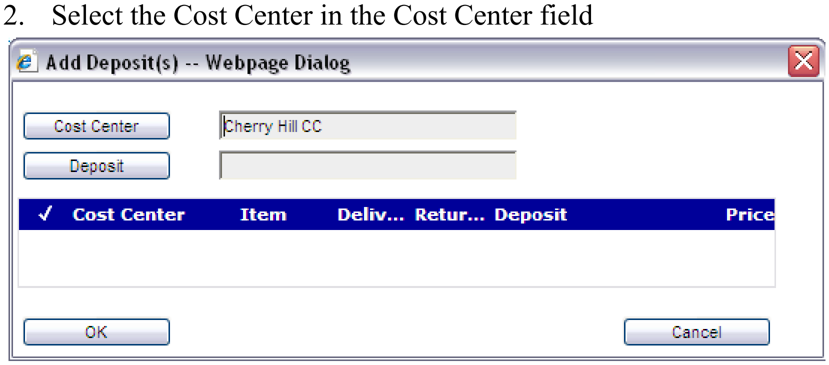
4. Select the Item that will replace the original Item and click OK. The Receipt will be updated with the new Item

Note	*When substituting an Item, you must have created a Vendor Purchase Item. If you have no Vendor Purchase Items, the substitution page will open with no possible substitution options*

Deposits

To assign a deposit:

1. From the Receiving Detail window, click the Deposits button
2. Select the Cost Center in the Cost Center field



3. Select the appropriate Items and enter qty delivered or returned
4. Click OK

Changing Cost Center

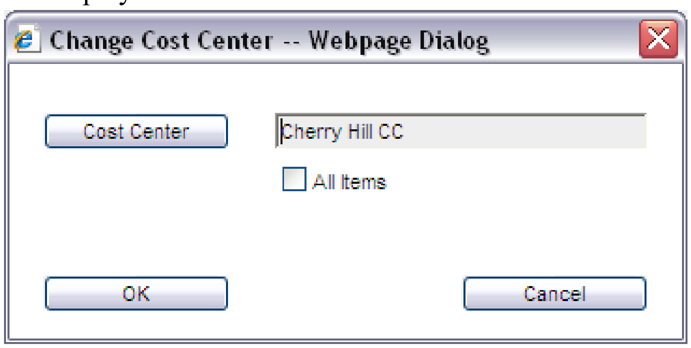
You can apply a new Cost Center to all Items on a Receipt or only to selected Items. To change Cost Centers for a select number of Items, check the box to the left of the Item name prior to beginning the following instructions.

Tips & Tricks

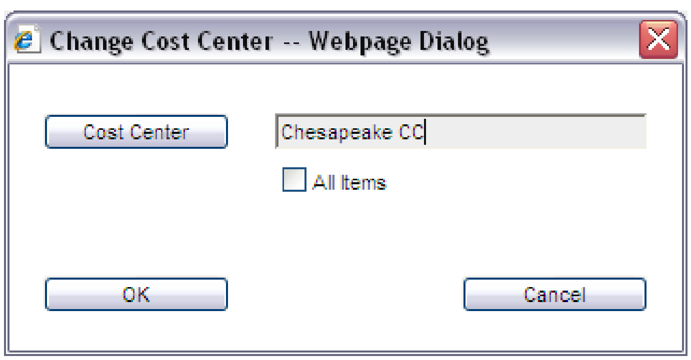
Never do this unless the Cost Center has an assigned purchase manager. Sites that do not use central purchasing should not use this option, as Items may be received into the wrong location.

To change Cost Centers for one or more Items on the Receipt, from the Receiving Detail window:

1. Click the Change Cost Center button; the Change Cost Center window will be displayed:



2. Place the cursor in the Cost Center field and press Enter; the Cost Center Options window appears and shows a list of available Cost Center:
3. Select a Cost Center and click OK:

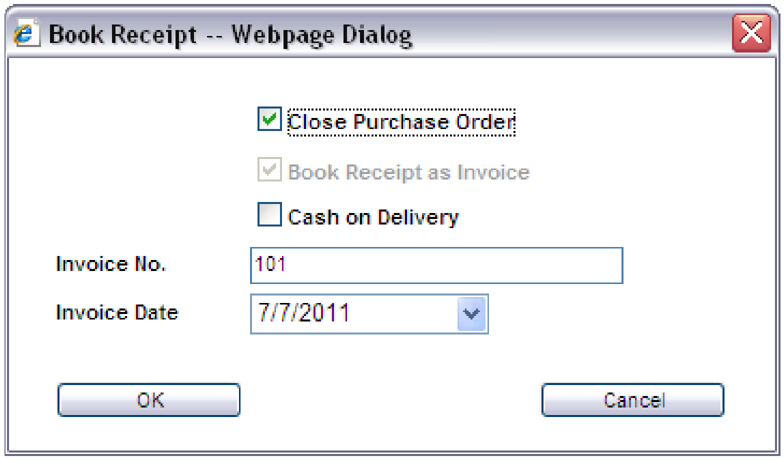


4. Select whether you want to change the Cost Center for all Items or only for selected Items; click OK.
5. The Cost Center will be changed with the options you have chosen.

Book Delivery Note

After you have created a Receipt and are ready to finalize it, you can book the Receipt:

1. From the Receiving Detail window, click Book from the Top Menu Bar; the Book Delivery Note window appears:



Close Purchase Order

When a delivery is made, Items that have been ordered may not have been delivered. When Items do come in, they are removed from the Purchase Order. Items that have yet to come in or are not coming in at all will remain on the Receipt. Unless the Purchase Order is closed, these Items will remain on the Receipt and remain on the Purchase Order. If you receive the PO again, you will only receive the Items that were not previously included, not the entire contents of the order.

If you want to close the Purchase Order upon booking it, check the Close Purchase Order (PO) box. This option closes the PO but does not create an Invoice. Otherwise leave it unchecked.

Tips & Tricks *MICROS recommends leaving the PO open if the site ties each PO to the Receipt. Missing or partially delivered products should appear on a separate Receipt/Invoice.*

After the PO is closed, it is closed for good. You do not want to select this option if you are Receiving a partial order and will need to Receive the rest of the order at a later date.

Book delivery note as an Invoice

To book the delivery note as an invoice, select the “Book delivery note as an Invoice” option. The invoice you receive when your delivery arrives will be your official Receipt.

The permissions for the previous options are set at the administrator level.

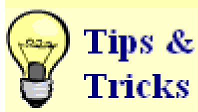
2. Click OK; the Receipt is now booked and Stock on Hand will be updated in real time.

Invoicing

Introduction and Overview

Invoicing allows payment authorization for Items received. Multiple Receipts can be added to an individual Invoice. Approvals can be saved to an export file to feed an Accounts Payable (A/P) System. For locations receiving by Invoice, this process can be combined with the Receiving process.

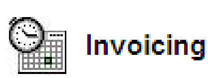
Note *If you are Receiving as an Invoice (i.e., your Receipt acts as your Invoice), then use of the Invoicing Module is not necessary. The "Receipt as Invoice" flag will need to be set for the Vendor*

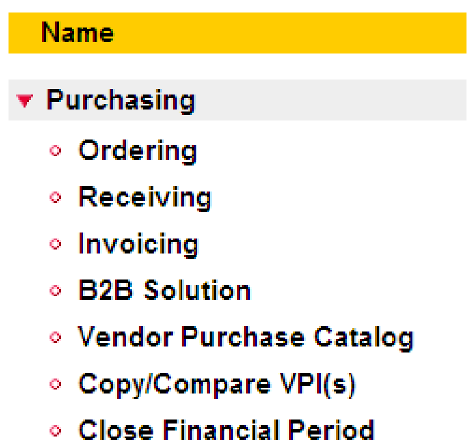


Using Receipt by Invoice is much easier and is recommended for use as much as possible. This way, multiple Receipts do not have to be balanced to equal an Invoice total.
This may not be possible with all Vendors – please consult your Vendor about different options (COD is considered Receive as Invoice)

Accessing the myinventory Invoicing Module

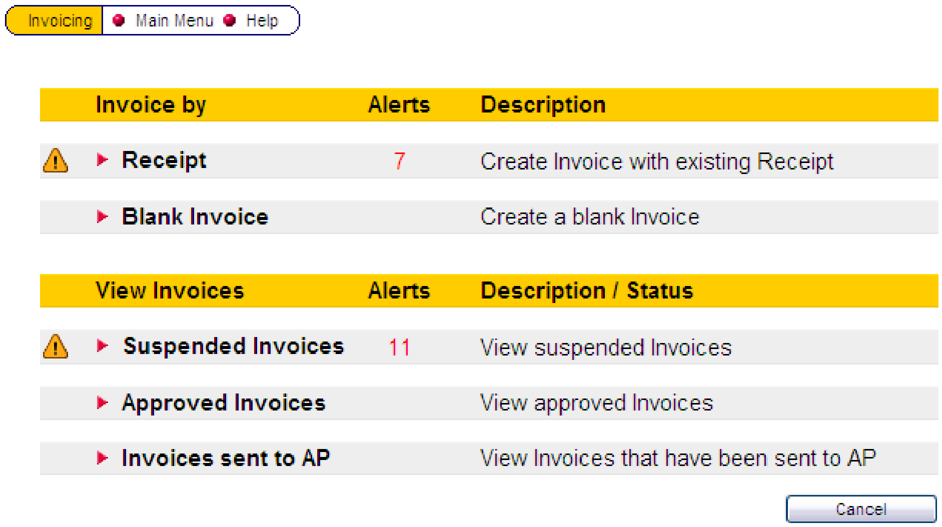
From the Main Menu, click the Invoicing icon, or select Purchasing | Invoice to access the module:





The Invoicing Overview Window

The Invoicing Overview window is the first window you will see after accessing the Invoicing module from the main myinventory menu.



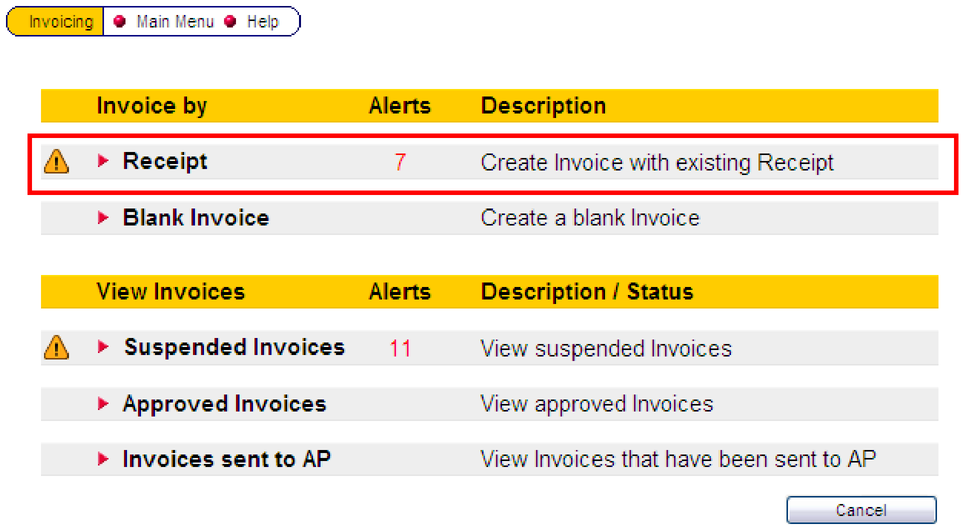
From the Invoicing overview page, you have the ability to create Invoices by Receipt, or create Blank Invoices. You may also view Suspended Invoices, Approved Invoices, and Invoices sent to AP.

Create Invoices

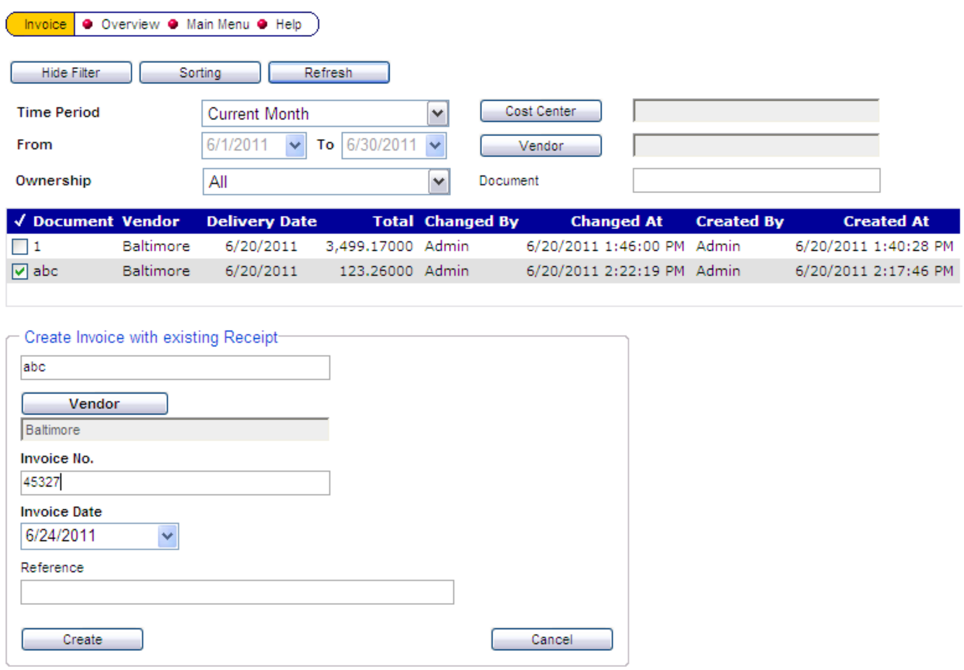
Create an Invoice by Receipt

To create an Invoice by Receipt:

1. From the Invoice Overview window, select Receipt

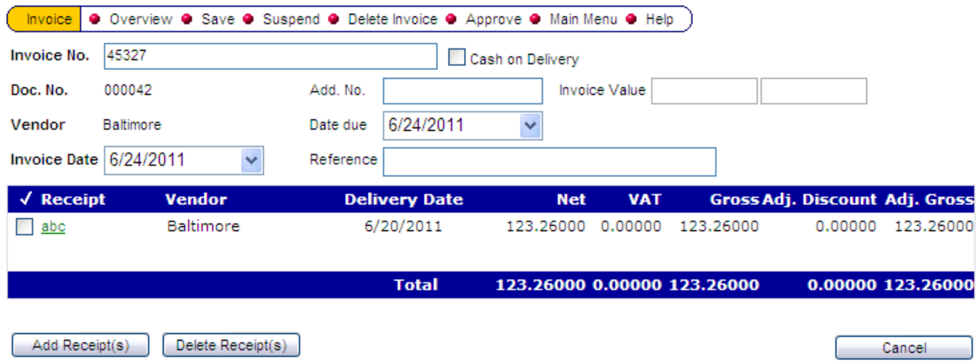


2. Use the filters to find the Receipt to be Invoiced. Select the check box next to the desired document(s), enter an Invoice No. and an Invoice Date, and click Create



Note *Multiple Receipts from a single Vendor may be added to the same Invoice, however, an Invoice may not contain Receipts for more than one Vendor*

3. The Invoice Detail window will be displayed:

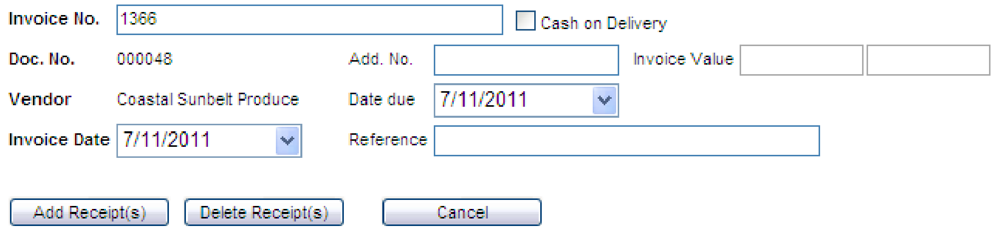


The following section describes the Invoice Detail window.

Top Menu Bar

Menu Item	Description
Overview	Go to the Invoicing Overview screen.
Save	Saves the Invoice as is and keeps you in the detail window to continue working on the document.
Suspend	This feature saves the Invoice and returns you to the Overview screen where you will see this Invoice displayed with a Suspended status. You can add Receipts and continue working on this Invoice at another time.
Delete Invoice	Deletes the current Invoice and returns you to the Overview window.
Approve	Approve/book your Invoice. Once an Invoice is ‘Approved,’ it will move to A/P automatically, according to your organization’s accounting practices. You will now see this Invoice when using the filter ‘sent to A/P’ within the Invoice Overview screen.
Main Menu	Return to the Main myinventory menu.
Help	Launch the Help file.

Additional Screen Elements



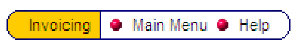
Screen Element	Description
Invoice No.	Displays the Invoice number
Doc. No.	Displays the Document number. This number is assigned by the system
Vendor	Displays the Vendor that the Invoice is for
Invoice Date	Displays the Date of the Invoice
Cash on Delivery	Indicate if this Invoice requires a Cash on Delivery payment
Add. No.	If there is an additional Invoice number, enter it here
Date Due	Enter the Date that payment for the Invoice is due
Reference	Enter any additional information in this field
Invoice Value	Enter the Invoice total in the first field. The second field will calculate the difference between the Invoice total and the total of the Items that have been added to the Invoice
Add Receipt(s)	Displays all available Receipts for the Vendor chosen. You may select as many Receipts as you would like by checking the boxes to the left of each Receipt. Once you have made your selection and clicked OK, those Receipts will be added to the Invoice
Delete Receipt(s)	This option removes a Receipt from the Invoice. First select a Receipt(s) by checking the boxes to the left of each Receipt, then click ‘Delete Receipt(s)’ to delete the Receipt(s) from your Invoice
Cancel	Returns you to the Invoicing Overview window. This will not delete (cancel) the Invoice that you were working on, even if it was not previously saved. To delete the Invoice, you must select it and then use the Delete Invoice function as described in the Top Menu Bar

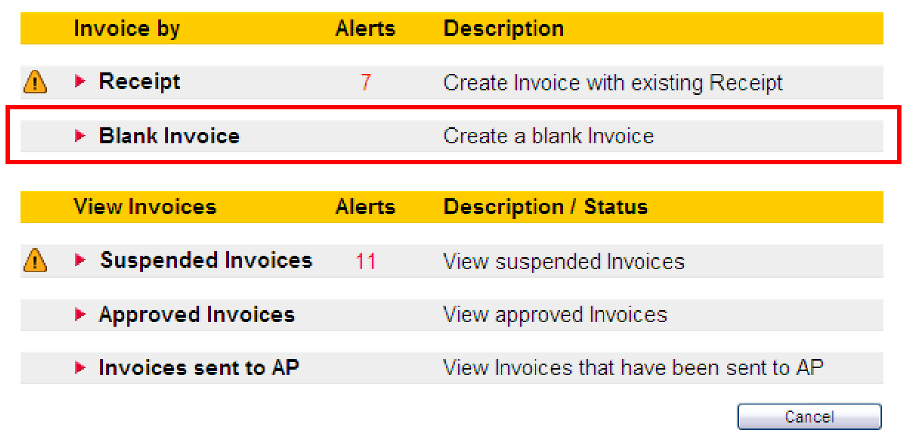
Information Bar

Screen Element	Description
Receipt	Displays the Receipt name
Vendor	Displays the name of the Vendor
Delivery Date	Displays the Delivery Date
Net	Displays the Net amount of the Receipt
VAT	Displays the Tax amount of the Receipt
Gross	Displays the Gross amount of the Receipt
Adj. Discount	Displays any Adj. Discount amount of the Receipt
Adj. Gross	Displays the Adj. Gross amount of the Receipt

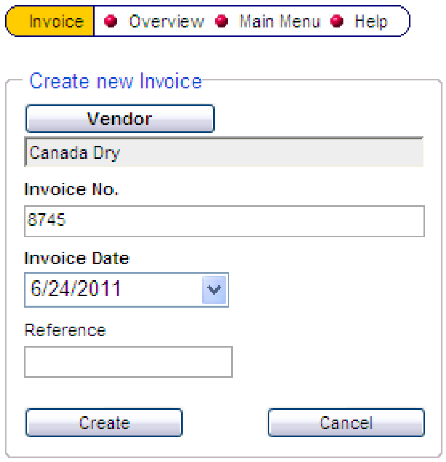
Create a Blank Invoice

1. Select Blank Invoice from the Invoicing Overview window

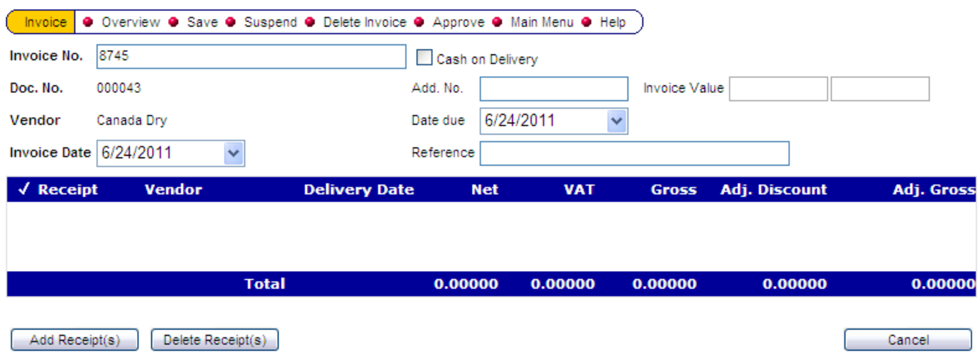




2. Select a Vendor, enter an Invoice No., and click Create



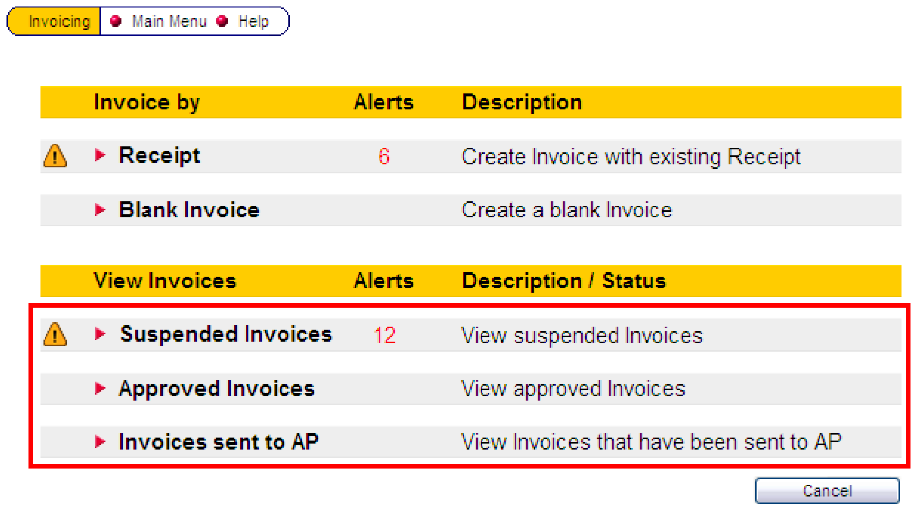
3. The Invoicing Detail window will be displayed:



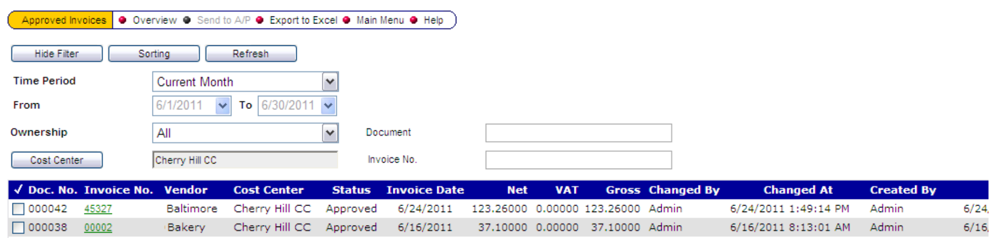
Viewing Invoices

The actions for viewing an Invoice, regardless of type, are relatively the same. The menu selection you make will determine the outcome of your search. To view an Invoice:

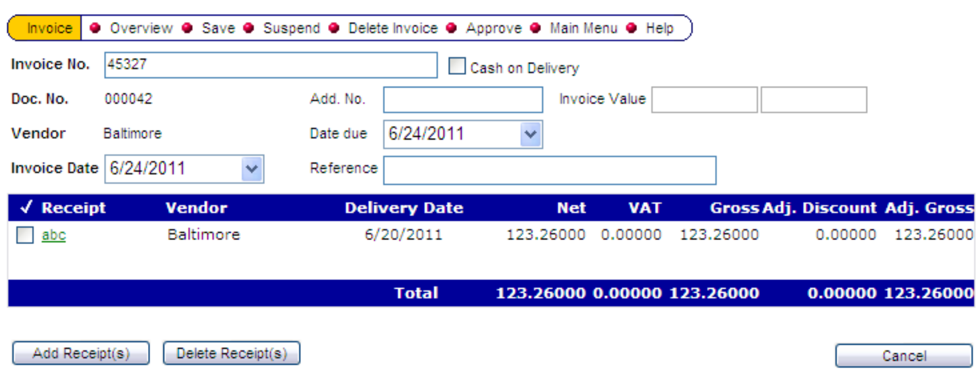
1. Select Suspended, Approved, or Sent to AP Invoices from the Invoicing Overview window:



2. Drill down into the Document by selecting the link in the Invoice No. column:



3. The Invoice Detail window will be displayed. View or change the Invoice as needed

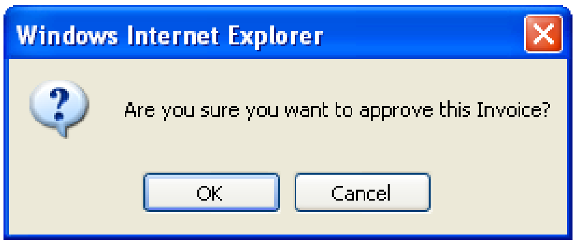


Approve an Invoice

Do not approve an Invoice unless it balances to the control total.

To approve an Invoice:

1. From the Invoice Detail window, select Approve from the Top Menu Bar; the following dialog box will be displayed:



2. Click OK. The Invoice is approved. You will be returned to the View Suspended Invoices window.
3. To ensure that the Invoice has been approved and to send the Invoice to A/P, navigate to Approved Invoices and adjust your filters to find the Document.
4. Select the Document by marking the check box to the left of the Document number. Click the link in the Top Menu Bar to Send to A/P. The Invoice will be added to the system export file and will no longer be editable.

Deleting an Invoice

To delete an Invoice, please refer to the Deleting a Document section of this document.

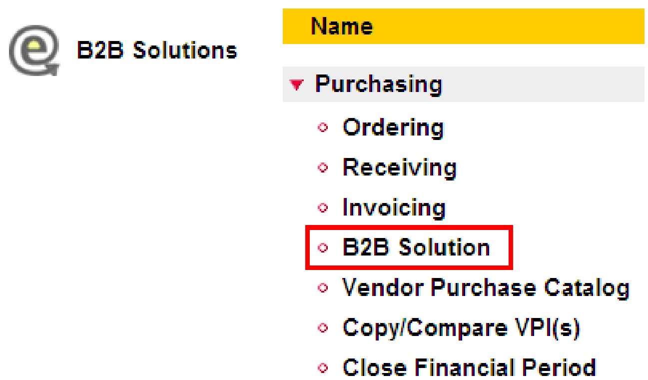
B2B Solution

Introduction & Overview

If you are using a Vendor for B2B Solutions, this module is where the Item Catalog, Invoices, and Order Cycles coming from that Vendor will be loaded.

Accessing the B2B Solution

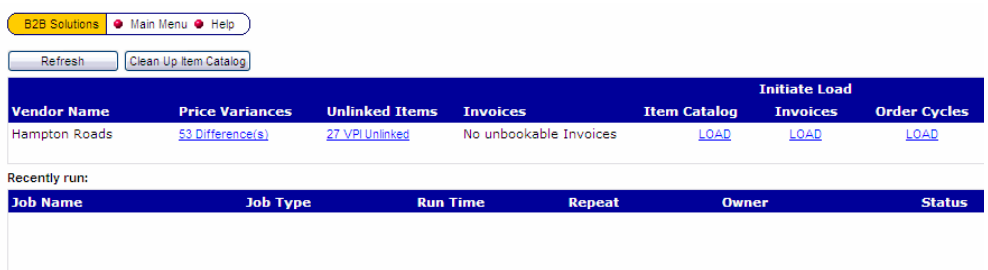
To access the B2B Solutions page, click the B2B Solutions icon or select B2B Solutions from under the Administration level tasks:



You will be directed to the B2B Solution Overview page.

B2B Solution Overview Page

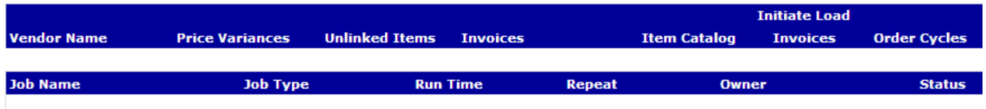
The following section details the fields and information located on the B2B Solution Overview page.



The Top Menu Bar

Menu Item	Description
Main Menu	Return to the Main myinventory Menu.
Help	Launch the Help file.

Information Bar



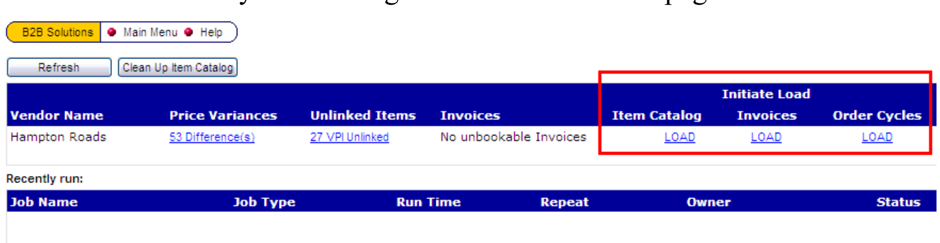
Menu Item	Description
Vendor Name	Displays the name of Vendor
Price Variances	If you have imported a Price Catalog or an Item Catalog, and the prices do not match what you have in your system, results will be shown here
Unlinked Items	Displays how many VPIs from that Vendor are not linked to an Item
Invoices	Displays Invoices from the Vendor that contain Unlinked Items that need to be Linked before they may be closed
Item Catalog	Click the link marked LOAD to load an Item Catalog
Invoices	Click the link marked LOAD to load Invoices
Order Cycles	Click the link marked LOAD to load Order Cycles
Job Name	Shows the name of the recently run job
Job Type	Shows the type of the recently run job
Run Time	Displays the run time of the recently executed job
Repeat	Shows how many times the same job has been executed
Owner	The User name of the person who started the job
Status	Shows the status of the job (ex. Not Started, Completed, In Process, etc)

Load

You have the ability to load an Item Catalog, initiate an Invoice, or load an Order Cycle to your Vendors.

The steps to accomplish any of these tasks are essentially the same:

1. Click the LOAD link from under the Article Catalog **or** Initiate Load Invoices **or** Load Order Cycles heading of the B2B Overview page



2. The following dialog box will appear – click OK:

3. A Job Name will appear in the lower window on the screen – when the job is completed, the message ‘Execution completed successfully’ will appear under the Status column:

Recently run:

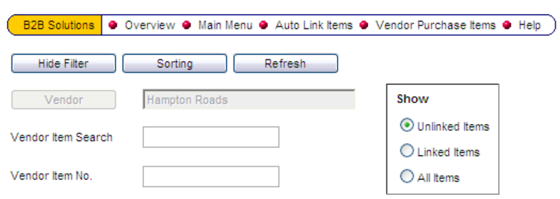
Job Name	Job Type	Run Time	Repeat	Owner	Status
JOB-2011-0000159	B2B Import Order Cycle (single Vendor)	6/17/2011 1:53:50 PM	Run once	Admin	
JOB-2011-0000158	B2B Import Invoice/Credit Note (single Vendor)	6/17/2011 1:53:46 PM	Run once	Admin	
JOB-2011-0000157	B2B Import Item Catalog (single Vendor)	6/17/2011 1:51:27 PM	Run once	Admin	

Link/Unlink Vendor Purchase Items (VPIs)

Items from the Vendor need to be linked to Purchase Items already in the system. After a Vendor Item Catalog has been uploaded into the system, the number of unlinked Items will be shown under the Unlinked heading of the B2B Overview page. You also have the ability to link Items that have been previously linked to other VPIs and unlink Items.

B2B Solutions Linking Overview

The first page you see after selecting the Unlinked Items link in B2B Solutions is the Linking Overview.



Item	Action	Vendor Item No.	Unit	Price	Vendor Price Valid From	Vendor Price Valid To
CHEESE CREAM	Link	1012566	EA	5.08000	3/31/2008	
SPREAD GRLC SCAMPI	Link	2437481	CA	23.87000	11/16/2009	
MAYONNAISE HEAVY DUTY	Link	4002432	CA	20.22000	12/14/2009	
GEAR OPENER CAN#1	Link	4049375	CA	17.80000	12/14/2009	
MUSTARD DIJON W/WHT WINE TIN	Link	4064978	EA	15.66000	3/31/2008	

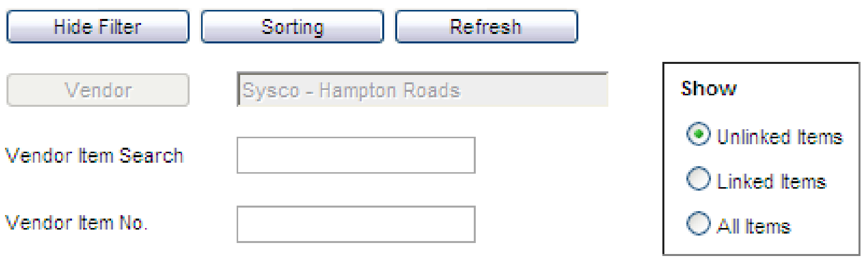
From this window, you can link and unlink Vendor Items, as well as auto link Items.

The following section describes the elements contained in the Linking Overview.

The Top Menu Bar

Menu Item	Description
Overview	Go to the subject area overview.
Main Menu	Return to the Main myinventory Menu
Auto Link Items	This option will Auto Link Items if the Vendor Catalog number matches the Vendor Purchase Item number
Vendor Purchase Items	Opens the Vendor Purchase Catalog
Help	Launch the Help file

Additional Screen Elements



These filters behave as described in the Welcome section. For more information, please refer to the screen layout section of the Welcome page.

Information Bar

Menu Item	Description
Item	Displays the name of the Vendor Item
Action	Contains a link stating if the Item is Linked or Unlinked
Vendor Item No.	Displays the Vendor Item No.
Unit	Displays the Unit for the Vendor Item
Price	Displays the price of the Vendor Item
Vendor Price Valid From	Displays when the Item Price Validity begins
Vendor Price Valid To	Displays when the Item Price Validity ends

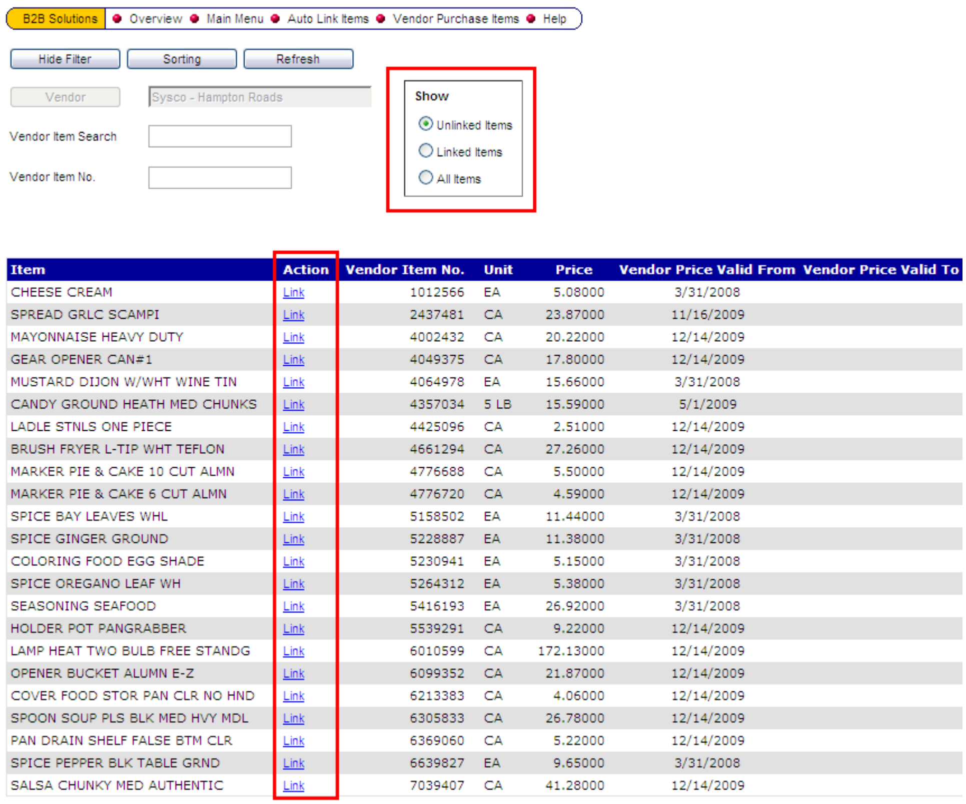
Link Items

1. Click the link under the Unlinked Items heading of the B2B Overview page

Vendor Name	Price Variances	Unlinked Items	Invoices	Initiate Load Item Catalog	Initiate Load Invoices	Initiate Load Order Cycles
Hampton Roads	53 Difference(s)	27 VPI Unlinked	No unbookable Invoices	LOAD	LOAD	LOAD

Job Name	Job Type	Run Time	Repeat	Owner	Status

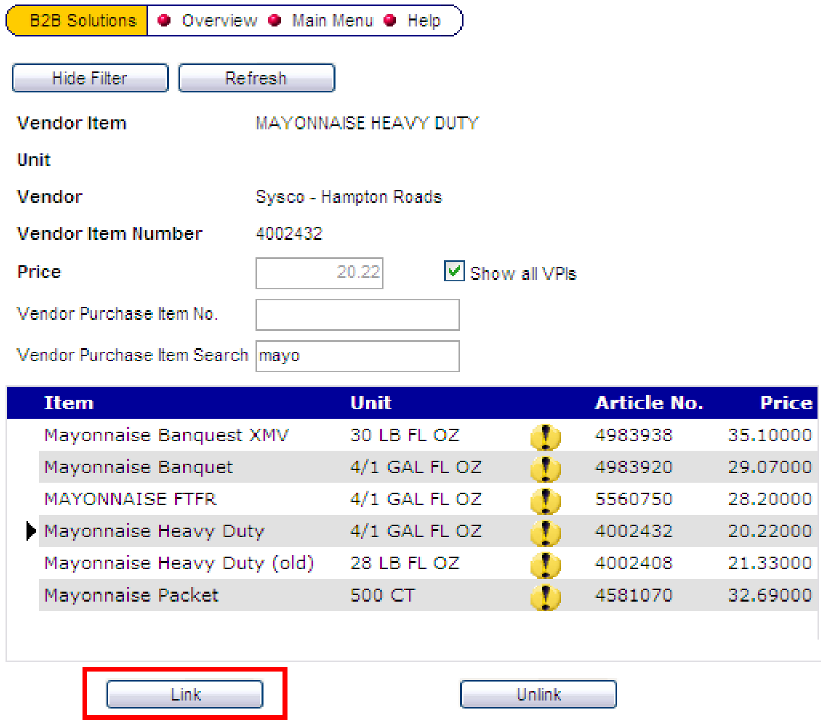
2. Select Link under the Action heading in the B2B Solutions linking page – notice the Unlinked Items option is selected in the Show Filter



Item	Action	Vendor Item No.	Unit	Price	Vendor Price Valid From	Vendor Price Valid To
CHEESE CREAM	Link	1012566	EA	5.08000	3/31/2008	
SPREAD GRLC SCAMPI	Link	2437481	CA	23.87000	11/16/2009	
MAYONNAISE HEAVY DUTY	Link	4002432	CA	20.22000	12/14/2009	
GEAR OPENER CAN#1	Link	4049375	CA	17.80000	12/14/2009	
MUSTARD DIJON W/WHT WINE TIN	Link	4064978	EA	15.66000	3/31/2008	
CANDY GROUND HEATH MED CHUNKS	Link	4357034	5 LB	15.59000	5/1/2009	
LADLE STNLS ONE PIECE	Link	4425096	CA	2.51000	12/14/2009	
BRUSH FRYER L-TIP WHT TEFLON	Link	4661294	CA	27.26000	12/14/2009	
MARKER PIE & CAKE 10 CUT ALMN	Link	4776688	CA	5.50000	12/14/2009	
MARKER PIE & CAKE 6 CUT ALMN	Link	4776720	CA	4.59000	12/14/2009	
SPICE BAY LEAVES WHL	Link	5158502	EA	11.44000	3/31/2008	
SPICE GINGER GROUND	Link	5228887	EA	11.38000	3/31/2008	
COLORING FOOD EGG SHADE	Link	5230941	EA	5.15000	3/31/2008	
SPICE OREGANO LEAF WH	Link	5264312	EA	5.38000	3/31/2008	
SEASONING SEAFOOD	Link	5416193	EA	26.92000	3/31/2008	
HOLDER POT PANGRABBER	Link	5539291	CA	9.22000	12/14/2009	
LAMP HEAT TWO BULB FREE STANDG	Link	6010599	CA	172.13000	12/14/2009	
OPENER BUCKET ALUMN E-Z	Link	6099352	CA	21.87000	12/14/2009	
COVER FOOD STOR PAN CLR NO HND	Link	6213383	CA	4.06000	12/14/2009	
SPOON SOUP PLS BLK MED HVY MDL	Link	6305833	CA	26.78000	12/14/2009	
PAN DRAIN SHELF FALSE BTM CLR	Link	6369060	CA	5.22000	12/14/2009	
SPICE PEPPER BLK TABLE GRND	Link	6639827	EA	9.65000	3/31/2008	
SALSA CHUNKY MED AUTHENTIC	Link	7039407	CA	41.28000	12/14/2009	

3. From the B2B Linking Detail page, pull up all VPIs by enabling the Show all VPIs option

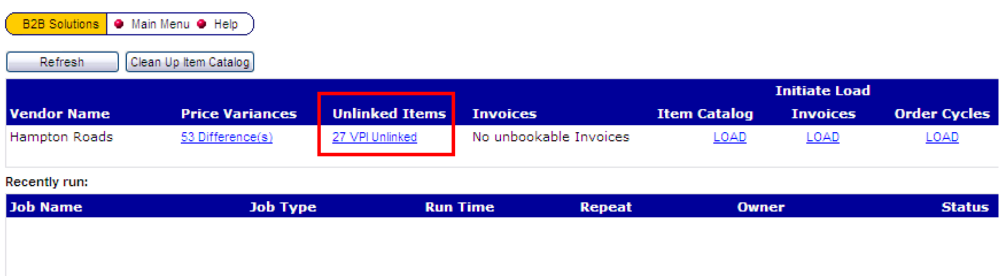
4. Search for the appropriate VPI and click Link



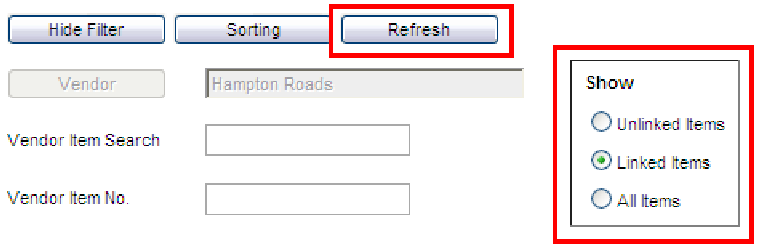
The Item will no longer be available in the list of unlinked Items.

Unlink Items

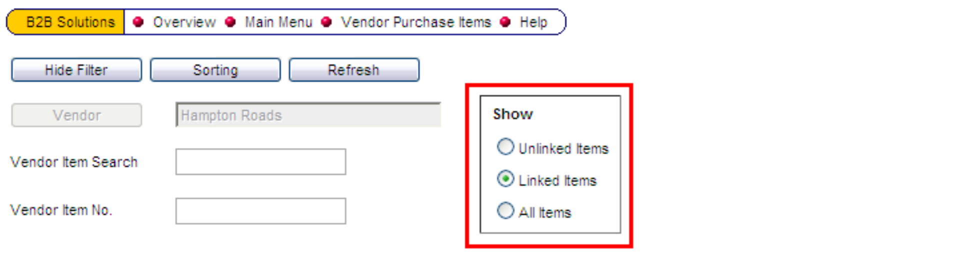
1. Click the link under the Unlinked Items heading of the B2B Overview page



2. Select the Linked Items option in the Show Filter and click Refresh

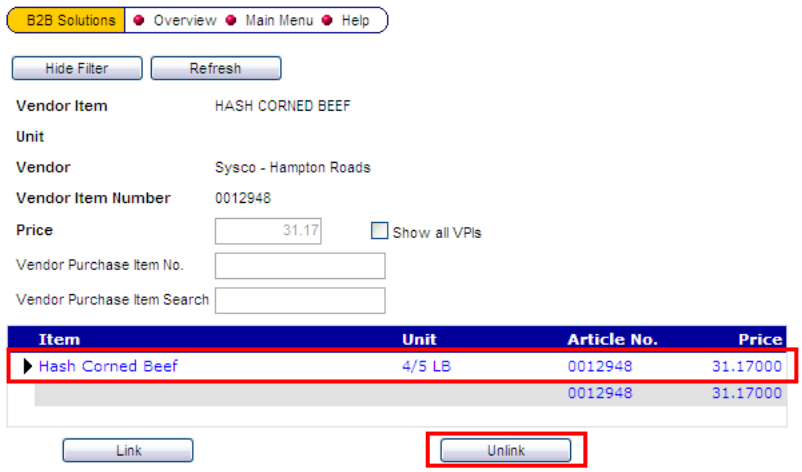


3. Select Linked under the Action heading in B2B Solutions linking



Item	Action	Vendor Item No.	Unit
HASH CORNED BEEF	Linked	0012948	CA
BAND NAPKIN BURG 6X1.5 INCH	Linked	0042051	2500CT
PASTE WASABI	Linked	0063420	CA
MILK HOMOGENIZED	Linked	0084657	CA
BREAD MULTIGRAIN 22 SLICES	Linked	0103879	32 OZ
BREAD WHITE CLUB SQUARE 24 SL	Linked	0104034	CA
BREAD SOURDOUGH 14 SLICE 3/4"	Linked	0104455	CA
SHELF METROSEAL 3	Linked	0113910	18X48
BUN HAMBURGER PLAIN 4" 1.72 OZ	Linked	0124636	CA
SANITIZER HAND FOOD CODE CMPLT	Linked	0132639	800ML
LID PLAS DOME F/SMRTLK TRAY CL	Linked	0141168	CA
TRAY PLAS CATER BLK FLT SMRTLK	Linked	0141176	16 IN
TRAY PLAS CATER BLK FLT SMRTLK	Linked	0141184	CA

4. From the B2B Linking Detail page, select the Item to be unlinked from the VPI and click Unlink

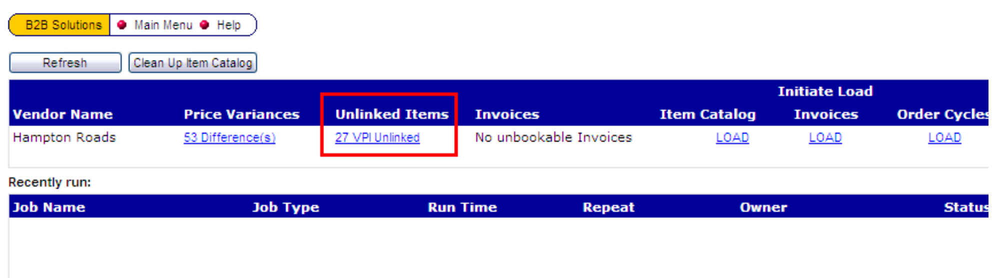


Auto Link Items

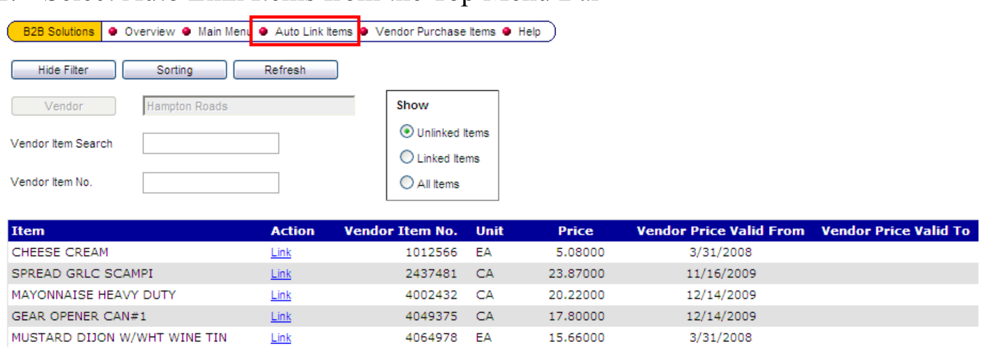
Items from a Vendor Catalog may be Auto Linked to Vendor Purchase Items in myinventory where matching Vendor numbers are identified. This will save time when a new Catalog is released or a new Vendor is being used.

To Auto Link Items:

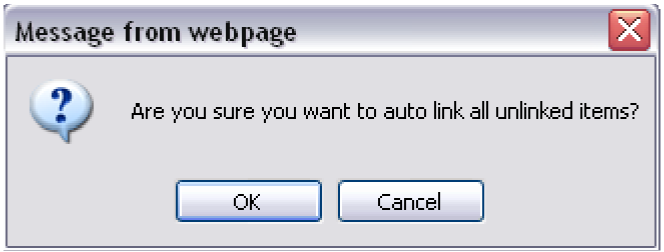
1. Select the Unlinked Items link from the B2B Overview



2. Select Auto Link Items from the Top Menu Bar



3. A prompt will be displayed, asking if you would link to auto link all unlinked items. Select OK

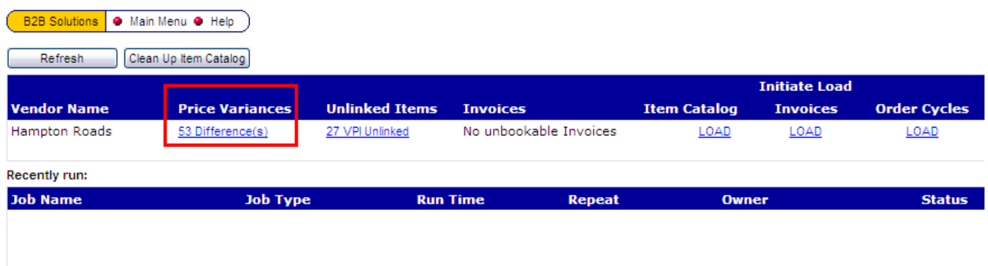


4. All Unlinked Items with Vendor numbers that match numbers from the Vendor Item Catalog will be linked.

Accept Price Variances

If the price varies between the Vendor's Item Catalog and the Vendor Purchase Item within the system, variances will appear. You may choose to use your prices for the Invoices or the prices provided by the Vendor. If you are using the prices provided by the Vendor, then you will need to accept the price. To accept the Vendor's price:

1. Click the link under the Price Variances heading of the B2B Overview page



2. Select the boxes next to the Items whose Price Variances you wish to accept and click the Accept Price(s) button

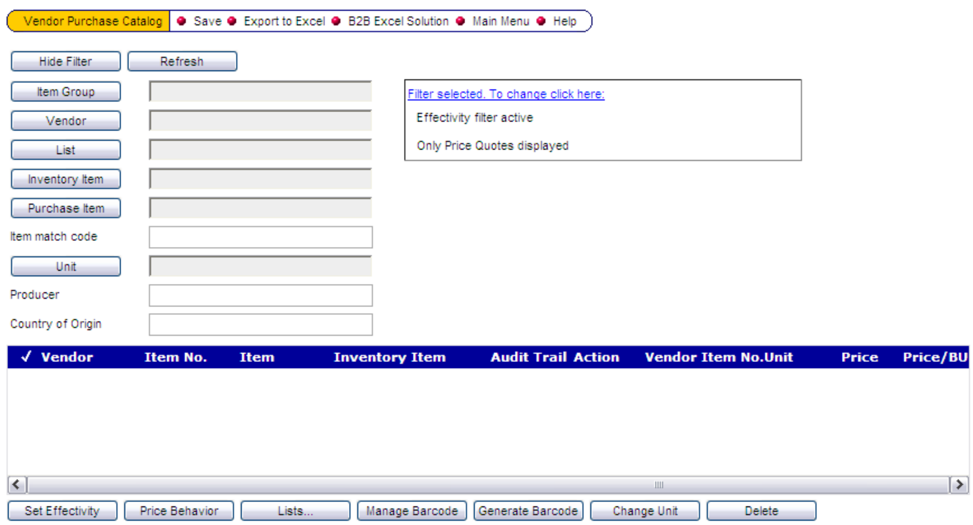
Vendor Purchase Catalog

Vendor Purchase Catalog Overview

The Vendor Purchase Catalog is where Items, Units, and Vendor Purchase Items can be assigned to Vendors.

Vendor Purchase Catalog Overview Window

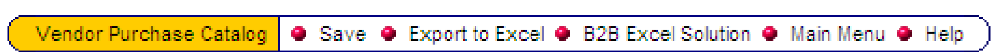
The first page you see after accessing the Vendor Purchase Catalog module is the Vendor Purchase Catalog Overview window:



From this window, you can review your Purchase Catalog information. Remember to click Refresh if no information appears on the page.

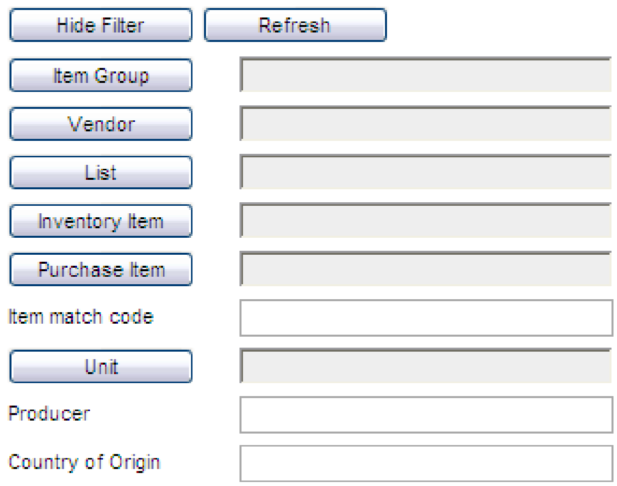
The following section describes the elements contained in the Vendor Purchase Catalog Overview window.

Top Menu Bar

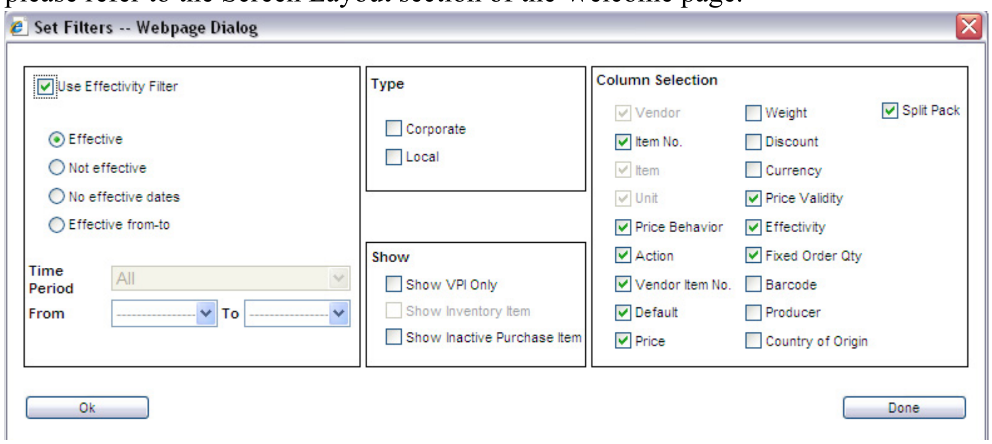


Menu Item	Description
Overview	Go to the subject overview page
Save	Save a newly created or recently modified Vendor Purchase Item
Main Menu	Return to the Main myinventory Menu
Help	Launch the Help file

Additional Screen Elements



These filters behave as described in the Welcome section. For more information, please refer to the Screen Layout section of the Welcome page.



Screen Element	Description
Use Effectivity Filter ◆ Effective ◆ Not effective ◆ No effective dates ◆ Effective from-to	Effective – filter for Vendor Purchase Items in use Not effective – filter for Vendor Purchase Items not in use No effective dates – filter for Vendor Purchase Items without defined effectivity dates Effective from-to – filter for Vendor Purchase Items with effective dates within a defined range of dates
Type: ◆ Corporate ◆ Local	Selecting “Corporate” will display Vendor Purchase Items for all stores. Selecting “Local” will display Vendor Purchase Items that are only for the stores within your Cost Center filter
Show: ◆ Show VPI Only ◆ Show Inventory Item ◆ Show Inactive Purchase Item	Show VPI Only - Selecting this option will cause only Vendor Purchase Items to be displayed in the result set Show Inventory Item - Selecting this will display the Inventory Item associated with the Vendor Purchase Item. This option is only available if Show VPI Only is enabled Show Inactive Purchase Items - Selecting this will display Vendor Purchase Items that are no longer active
Column Selection	Enable which Columns should be visible in Catalog Overview and Detail screens

Note *This filter is User specific and will retain its settings after leaving the application and logging back in.*

Information Bar

Menu Item	Description
Vendor	Displays the Vendor name
Item No.	Displays the Item number
Item	Displays the Item name
Inventory Item	The Inventory Item associated with the Vendor Purchase Item

Menu Item	Description
Audit Trail	If Audit Trail is enabled, selecting this option will display any changes that the Item has undergone and when they occurred
Action	There are 3 options: • New – create a new Vendor Purchase Item; discussed below • Link – create a link between an Item in a B2B Catalog and the Vendor Purchase Item • Linked – displays the linked Vendor Purchase Items and the B2B Catalog Item
Vendor Item No.	Displays the Vendor Item number (if available)
Unit	Displays the Base Unit for the Item
Weight	Displays the Weight of the Unit
Default	Defines the default Vendor Purchase Item from your default Vendor for the Item
Price	Displays the price of the Vendor Purchase Item
Price/BU	Displays the price of the Item in its Base Unit
2^{nd} Price	Displays the price that will be activated once the Valid Until date is reached
Valid from	Displays the beginning date of the price validity
Valid Until	Displays the ending date of the price validity
Discount %	Displays the percentage of discount during an effectivity range
Effective	Displays whether or not the Vendor/Item is effective
Effective from	Displays the date the effectivity begins
Effective until	Displays the date the effectivity ends
Receiving Cutoff	Displays the numbers of days the Item may be received past its Effective date
Fixed Order Qty	Defines the Fixed Order Qty, i.e. how many of the Item must be ordered at a time
Barcode	Displays the Item Barcode, if applicable
Producer	Displays the name of the Item’s Producer
Country of Origin	Displays what country the Item is from
Split Pack	Displays whether the Item can be ordered as a split pack from a B2B Vendor, i.e. half case instead of a whole case

Create a New Vendor Purchase Item (VPI)

Tips & Tricks

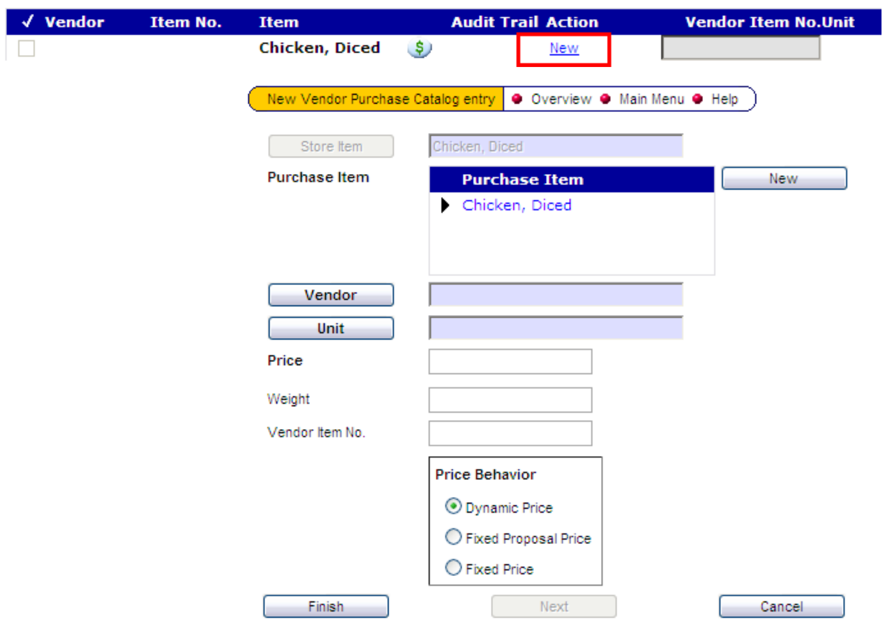
Use Purchase Items to get information about specific brand names of inventory Items. For example:

Item = Bacon

Purchase Item = Hormel Bacon

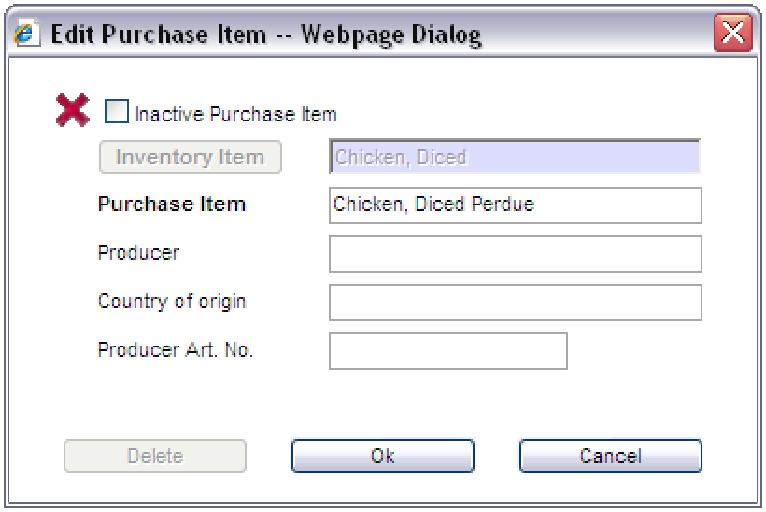
To create a new Vendor Purchase Item (VPI):

1. Locate the Item and click the link under the Action column labeled New; the New Vendor Purchase Catalog entry window will be displayed:

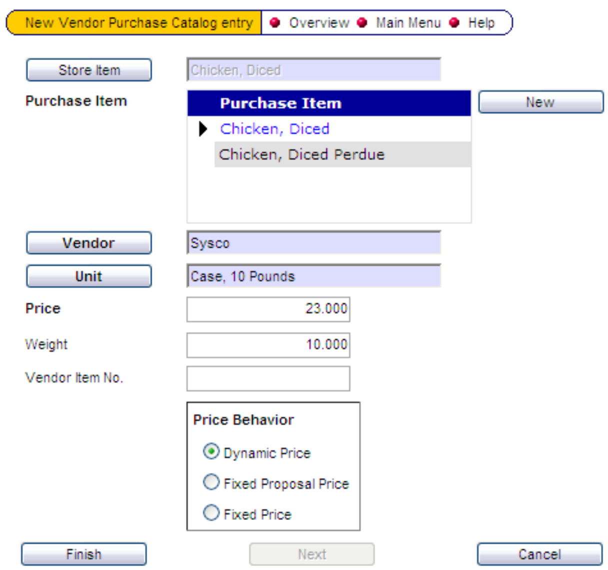


2. Click the New button on the New VPI entry page; a new dialog box will be displayed

3. Enter the Purchase Item Name, if not already entered and click Ok (Producer, Country of Origin, and Producer Art. No are optional fields)



4. Select the Purchase Item to link a Vendor to from the Purchase Item window and enter Vendor, Unit, and Price (Vendor Item No. is an optional field):



5. Click Finish

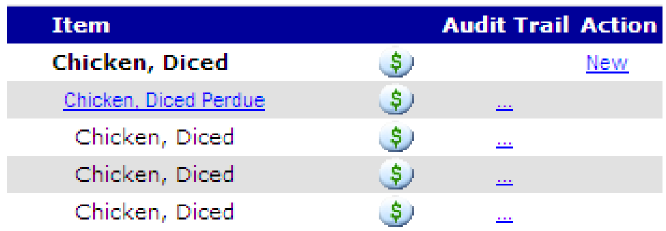
The New VPI will be reflected in the Vendor Purchase Catalog Overview window:

Note *You may have more than one VPI to create. Instead of clicking Finish when complete, click Next from the New Vendor Purchase Catalog entry page.*

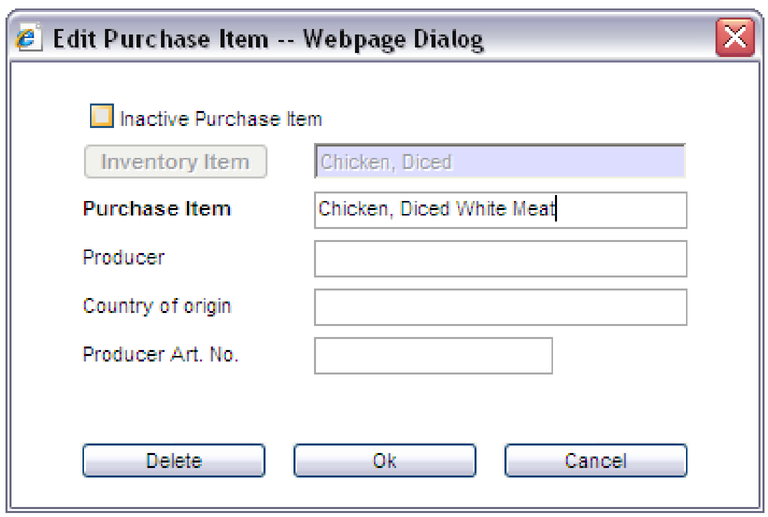
Edit Vendor Purchase Item Name

Errors and mistakes made to a saved VPI Name may be modified. To change a VPI Name:

1. From the Vendor Purchase Catalog Overview page, use the filters to locate the Item to be edited
2. Select the link associated with the Purchase Item:



3. A pop-up window will open where the name may be changed:



4. Click Ok

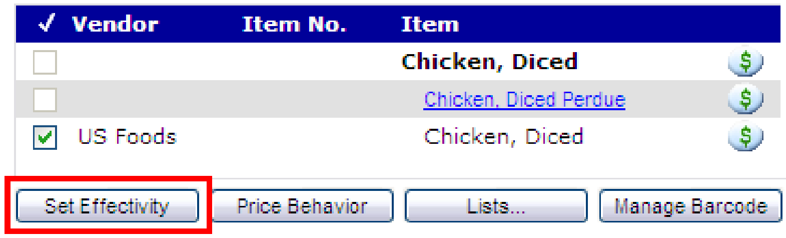
The VPI Name has now been updated to reflect the changes in the Purchase Items.

Set Effectivity Range

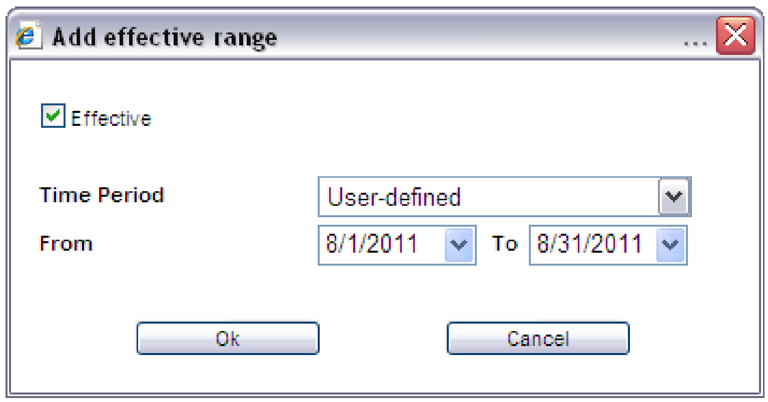
To add an effectivity range to a Vendor:

1. Select a Vendor and their Item by enabling the check box next to the Vendor

2. Click the “Set Effectivity” button at the bottom of the page; a new dialog box will open



3. Enable the Effective check box



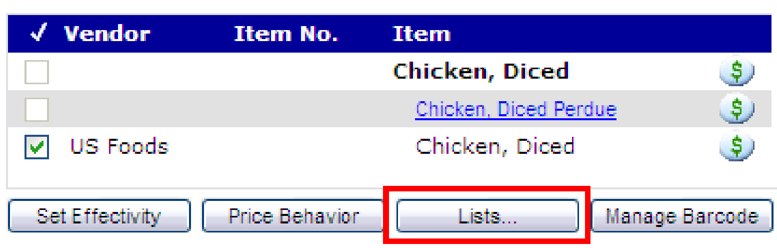
4. Select a Time Period – if you select User Defined, you will be required to enter dates in the From-To drop-down lists
5. Click OK

The Effectivity Range columns will be updated on the Vendor Purchase Catalog Overview page and the Effective checkbox is enabled:

Vendor Purchase Items and Lists

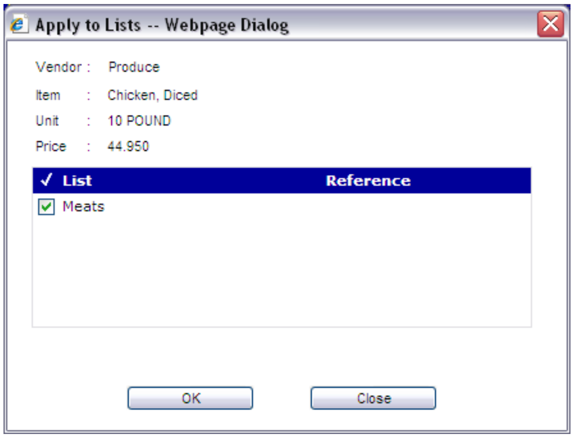
In this module, you may add a Vendor Purchase Item to a list or update an existing Vendor Purchase Item already within a list:

1. Select a row by enabling the check box next to a Vendor:



2. Click the Lists button at the bottom of the page; a dialog box will open

3. Select the Order List to which the Item will be associated and click OK:



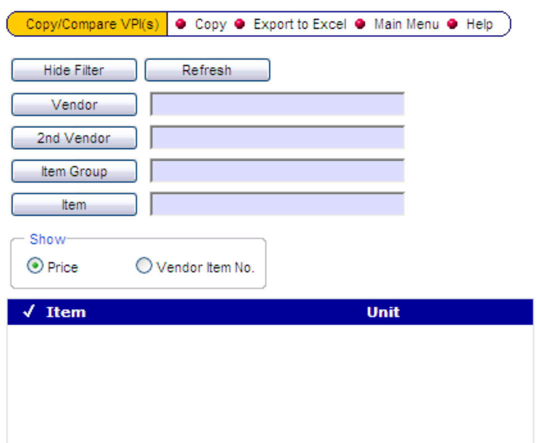
A confirmation statement will be displayed to verify completion

Copy/Compare VPI(s)

This module allows you to compare Vendor Purchase Items from two different Vendors, as well as copy information from one Vendor to another.

Copy/Compare VPI(s) Overview Window

When first accessing the Copy/Compare VPI(s) module, you are presented with the Overview screen:

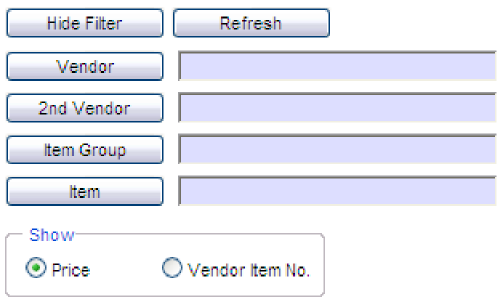


From here, you will be able to select and view two Vendors to compare, as well as copy one Vendor's Purchase Catalog to another's. The following section describes the elements contained in the Copy/Compare VPI(s) Overview window.

Top Menu Bar

Menu Item	Description
Copy	Copy a Vendor's Purchase Catalog and save it to a different Vendor
Export to Excel	Opens the current information into an Excel spreadsheet
Main Menu	Return to the Main myinventory Menu
Help	Launch the Help file

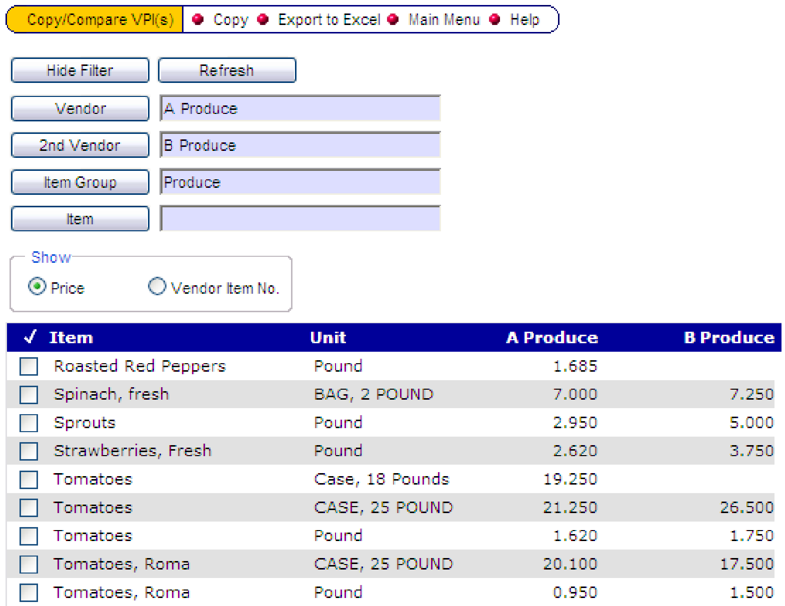
Additional Screen Elements



These filters behave as described in the Welcome section. For more information, please refer to the Screen Layout section of the Welcome page.

Copy/Compare VPI(s)

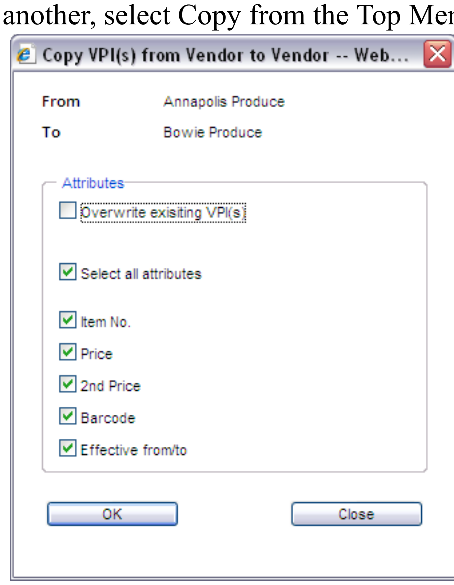
To compare two Vendor's Purchase Catalogs:



✓ Item	Unit	A Produce	B Produce
Roasted Red Peppers	Pound	1.685	
Spinach, fresh	BAG, 2 POUND	7.000	7.250
Sprouts	Pound	2.950	5.000
Strawberries, Fresh	Pound	2.620	3.750
Tomatoes	Case, 18 Pounds	19.250	
Tomatoes	CASE, 25 POUND	21.250	26.500
Tomatoes	Pound	1.620	1.750
Tomatoes, Roma	CASE, 25 POUND	20.100	17.500
Tomatoes, Roma	Pound	0.950	1.500

Enter a Vendor into both Vendor fields using the filters. You can also narrow down the information by entering an Item Group and/or Item. Select Refresh to view the results side by side in the Detail window below.

To Copy an Inventory Item's Unit and Vendor Purchase Item from one Vendor to another, select Copy from the Top Menu Bar. A window will open:



Use the check boxes to select the options you wish to copy and select OK.

Transfer To/From

This module is only available if the Transfers To/From Web User Right is set. If the Transfers Web User Right is not configured for your organization, please proceed to Chapter 6 Requisitions and Chapter 7 Transfers

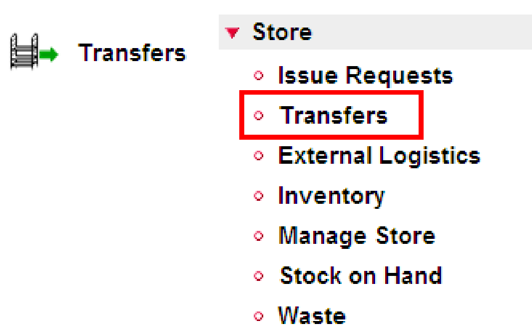
Introduction and Overview

Users have the ability to set up Transfers To and Transfers From specified Cost Centers within the organization. The general idea is that Location A will be creating a Transfer To to send goods to Location B, whereas Location B will be creating a Transfer From to receive goods from Location A. In previous version of myinventory, this task was broken into two separate modules. Regardless of how your organization is configured, the concepts are the same.

Depending on whether you are Location A or Location B determines your perspective toward this module. If you are the requesting location, you will be requesting a **Transfer From** another location. If you are the supplying location, you will be providing a **Transfer To** the location.

Accessing the Transfers To/ From Module

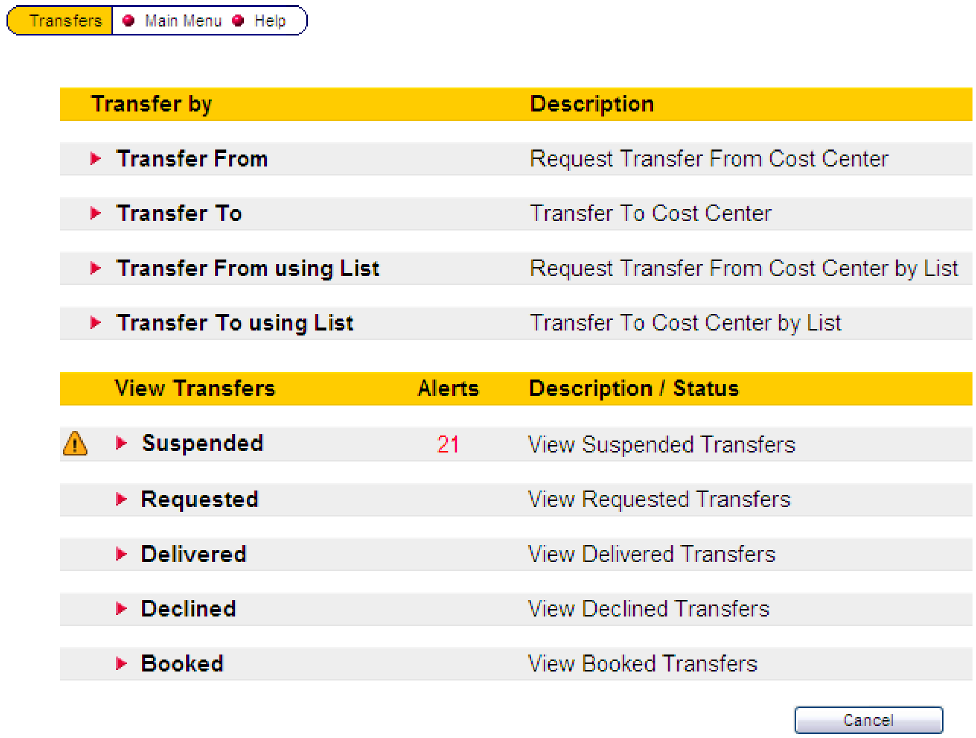
From the Main Menu, select the Transfers option from beneath the Store level functions:



You will be directed to the Transfers To/From Overview window where all Transfers can be created, requested, accepted, or denied.

The Transfer From/To Overview Window

The Transfers To/From Overview window is the first window you will see after accessing the module from the main myinventory window:



From this window, you can determine how Items will be Transferred and view any suspended, requested, delivered, declined, and booked Transfers currently in the system.

Create Transfers

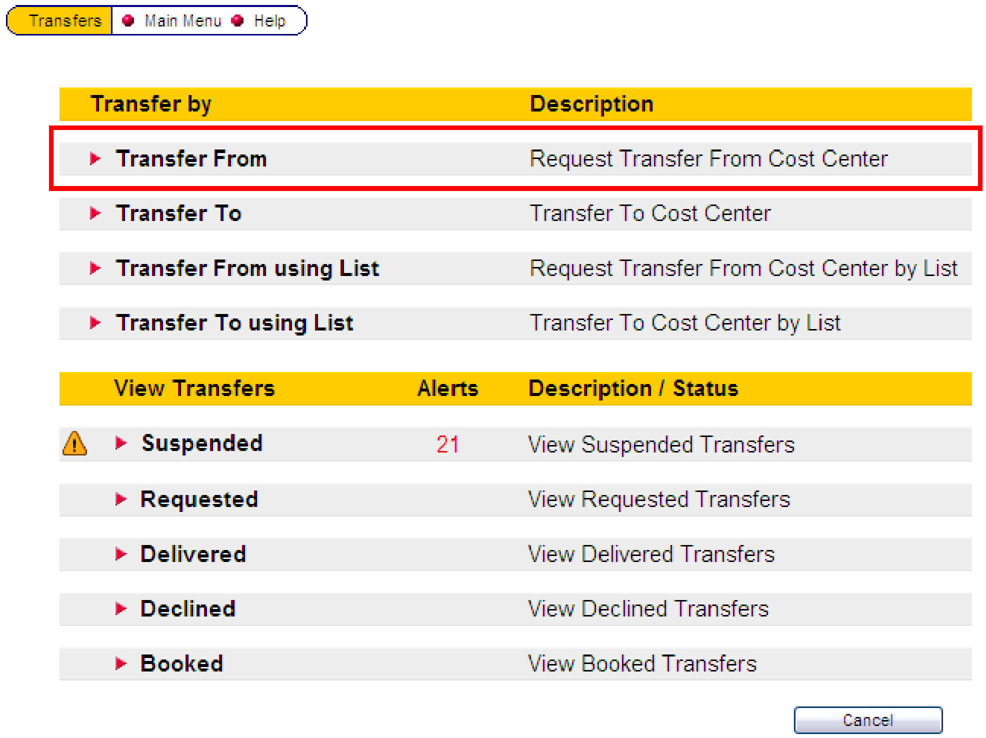
You can create Transfers 2 ways:

1. Transfer From/To – this allows you to create Transfers for source and destination locations and add any Items necessary
2. Transfer From/To using List – this option allows you to create Transfers for source and destination stores based on existing Transfer Lists

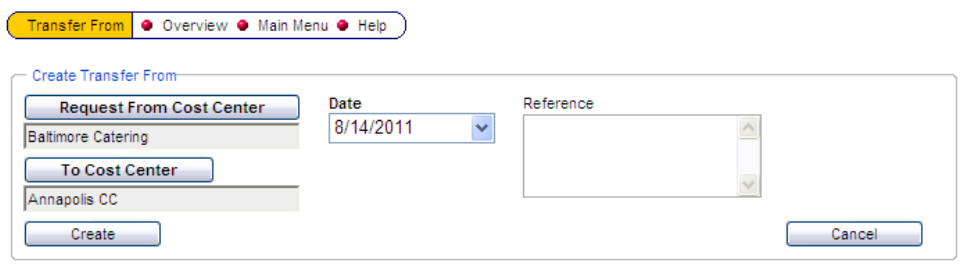
Create a Transfer From

“Transfer From” denotes the source store, i.e. the store from which the product is coming from. To create a Transfer From:

1. Select Transfer From from the Transfers Overview window:



Enter a location in the Request From Cost Center field, modify the date, specify any pertinent information in the Reference field (optional) and click Create:



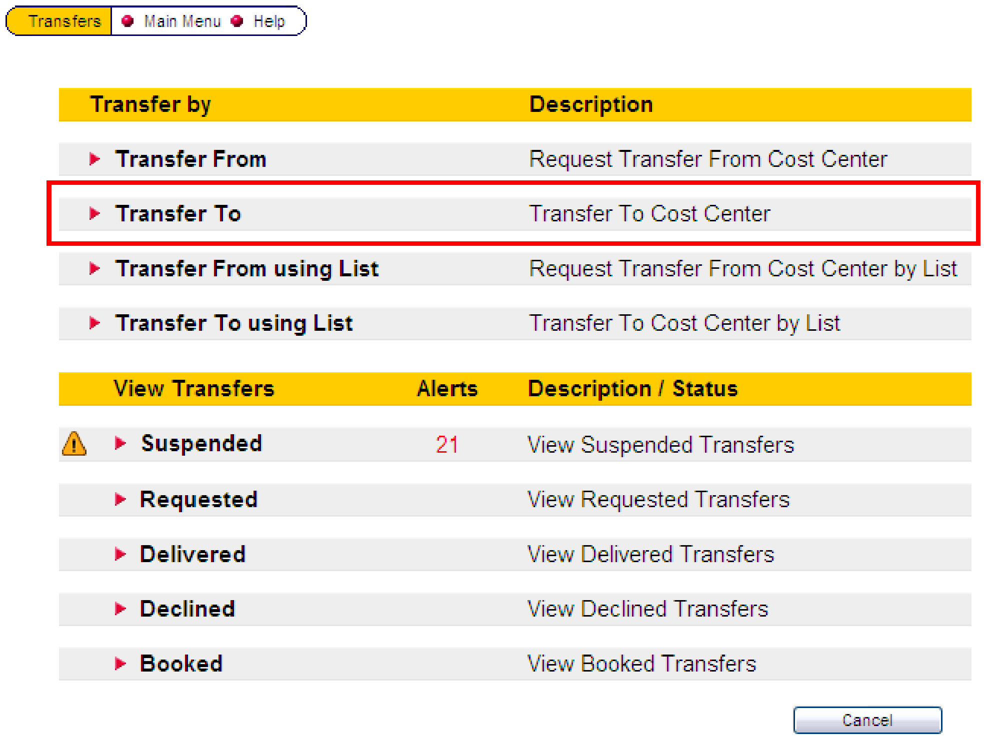
Note	*If Cost Center Areas are used, the To Cost Center must be defined first so that the system may filter the Cost Centers that are able to Transfer to them in the Request From field.*

2. From the Transfers From Detail page, begin adding any Items/Recipes as required; when you have finished, you may save the Transfer From or, to send it to the location, click Book

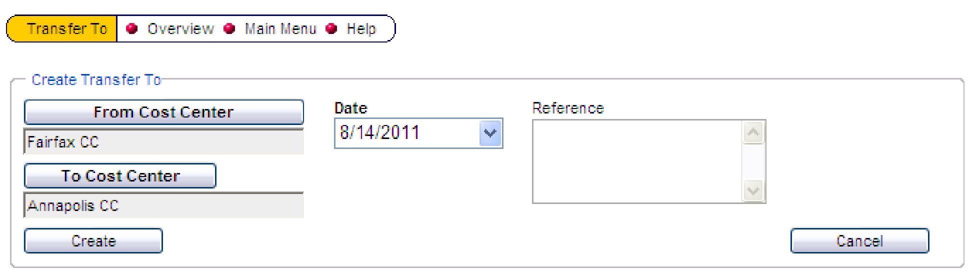
Create a Transfer To

"Transfer To" enables the User to specify which location will be receiving the merchandise or what store the goods are being Transferred to. To create a Transfer To:

1. Select Transfer To from the Transfers Overview window:



2. Enter a location in the To Cost Center/Store field, modify the date, specify any pertinent information in the Reference field (optional) and click Create:

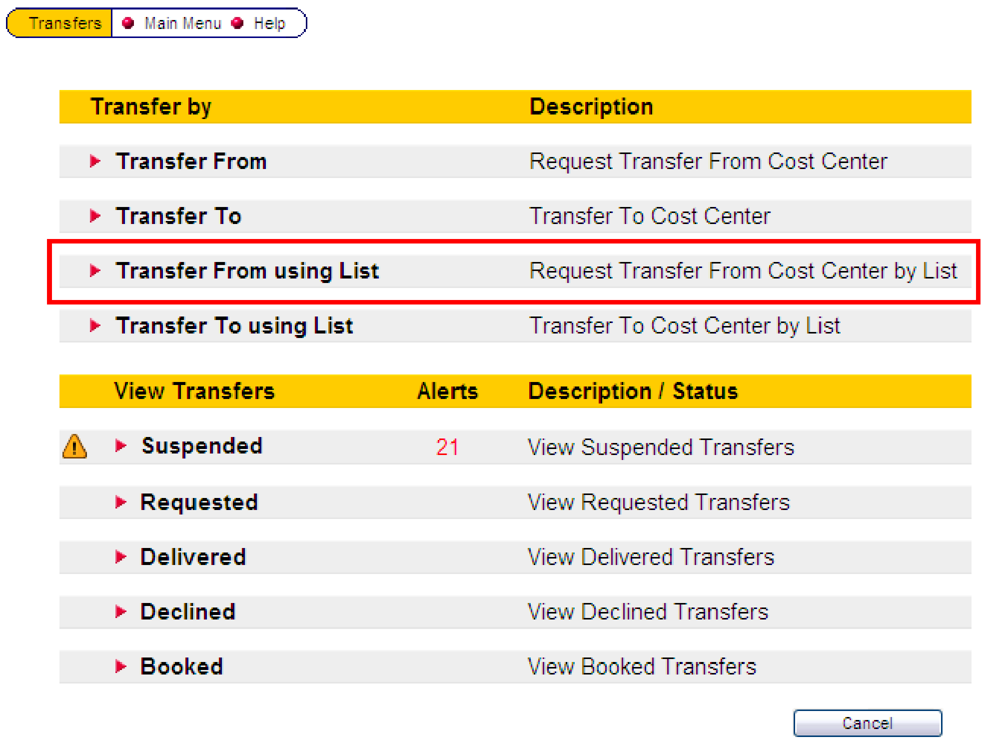


3. From the Transfers To Detail window, begin adding any Items/Recipes as required; when you have finished, you may save the Transfer To or, to send it to the location, click Book

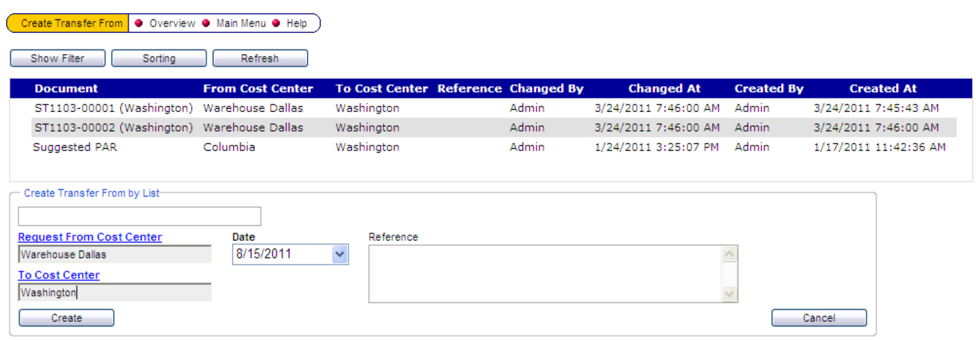
Create a Transfer From using List

"Transfer From using List" denotes the source store, i.e. the store from which the product is coming from and that you are using an already existing list of products. To force stores to use the Cost Center that the List was created for, enable the Configuration option USECOSTCENTERFROMLIST in Maintenance | Configuration. There is an additional User Right in the Store Section of Maintenance | User Management | Manage Rights that will allow a User to override this Configuration option. To create a Transfer From Using a List:

1. Select Transfer From using List from the Transfers Overview window:



2. Select an existing list from the Document column, enter/modify the location in the Request From Cost Center field, modify the date, specify any pertinent information in the Reference field (optional) and click Create:



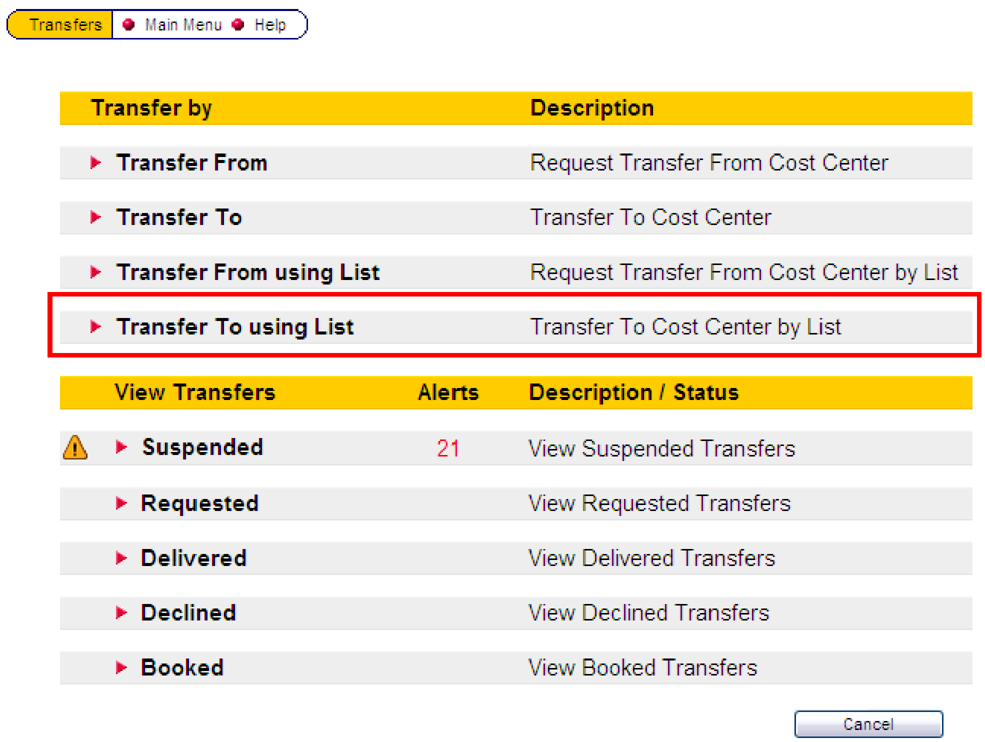
3. From the Transfers From Detail window, you may modify or add any Items/ Recipes as required; when you have finished, you may save the Transfer From using List or, to send it to the location, click Book

Note	*When using a Transfer From List that has suggested quantities enabled, a second delivery date will be assigned. This behavior is similar to Ordering by suggested quantities.*

Create a Transfer To using List

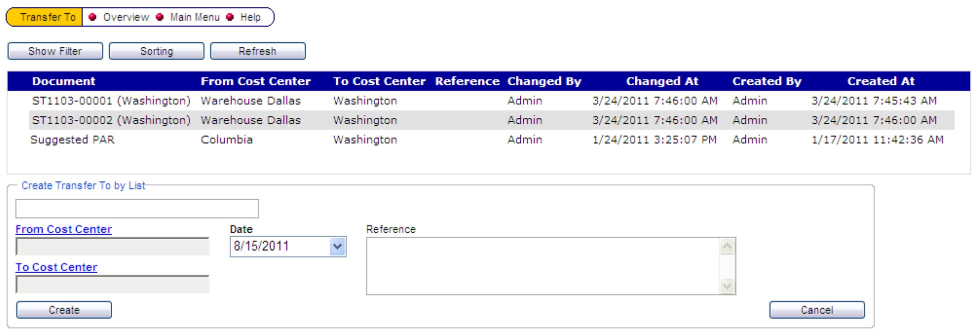
"Transfer To using List" enables the User to specify which location will be receiving the merchandise or what store the goods are being Transferred to. To create a Transfer To Using a List:

1. Select Transfer To using List from the Transfers Overview window:



2. Select an existing list from the Document column, enter/modify the location in the Request From Cost Center field and the To Cost Center/Store field, modify

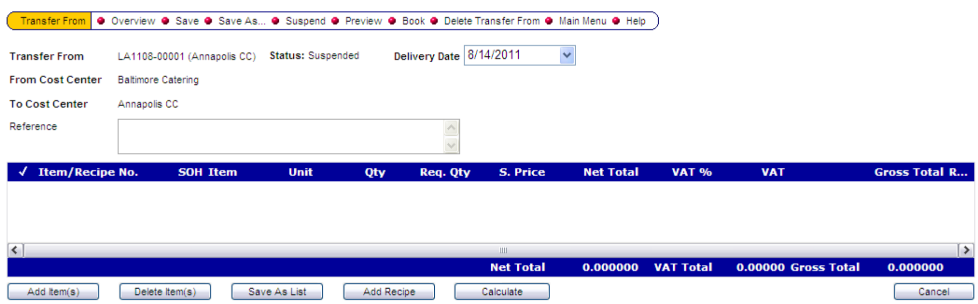
the date, specify any pertinent information in the Reference field (optional) and click Create:



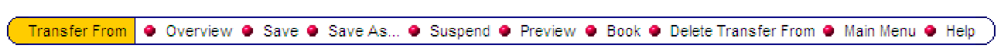
3. From the Transfers To Detail page, you may modify or add any Items/Recipes as required; when you have finished, you may save the Transfer To using List or, to send it to the location, click Book

The Transfers To/ From Detail Page

The following section describes the Transfer From/To Detail window.



Top Menu Bar



Menu Item	Description
Overview	Go to the subject area overview.
Save	Saves the Transfer entry
Save As…	Allows you to suspend the Transfer entry, rename it, and continue working on the Transfer entry under its new name.

Menu Item	Description
Suspend	This feature allows you to save the entry and returns you to the Overview window where you can continue working on this suspended entry at another time. Suspended entries are highlighted with the color green.
Preview	Allows you to preview the information in print format and print if necessary
Book	Select this option to book the Transfer
Delete Transfer From	Deletes the current Transfer entry and returns you to the Overview window. A Source Store can always delete a Transfer (From or To). Destination Store can delete a Transfer if they no longer need the product(s)
Main Menu	Return to the Main myinventory Menu.
Help	Launch the Help file.

Additional Screen Elements

Screen Element	Description
Add Item(s)	Use this to add Items to the Transfer Detail window
Delete Item(s)	To delete an Item/Recipe, first select an Item(s) or Recipe(s) by checking the check box to the left of the Item. Then click Delete Item(s) to delete Items from the Transfer entry.
Save As List	Use this to keep the current Transfer document for future use as a template or list. This list will show up on the Transfer Overview window and will be highlighted with the color blue. You can click a list to begin creating a Transfer entry that is pre-established or routine.
Add Recipe	Allows you to add a Recipe to the Transfer. If a Recipe is selected, the Ingredients are being Transferred, not the Recipe itself.

Screen Element	Description
Calculate	Use this whenever you want a Total for your Transfer entry to display at the bottom of the Detail page
Cancel	Cancels the current Transfer entry

Information Bar

Screen Element	Description
Item/Recipe No.	Displays the Item or Recipe number
SOH	Displays the stock-on-hand of the Item
Item	Displays the Item name
Unit	Displays the Unit of Measure
Qty	Allows you to enter the quantity of the Item to be Transferred
Req. Qty	Displays the quantity that has been requested for Transfer
Price/S. Price	Displays the cost of the Item per unit of measure. The S. Price is used when the sending Cost Center is configured to use Sales Price for Transfer (found in Master Data | Cost Centers). The Sales Price is then defined in Master Data | Items | Sales Price. If Use Sales Price on Transfer is not enabled, the normal cost is used for the Transfer.
Net Total	Displays the total Net cost of the Item
VAT%	Displays the Tax percentage for the Item
VAT	Displays the Tax value for the Item
Gross Total	Displays the total Gross cost of the Item
R...	If there is any information about this Item, the “i” will be red

Viewing Transfers

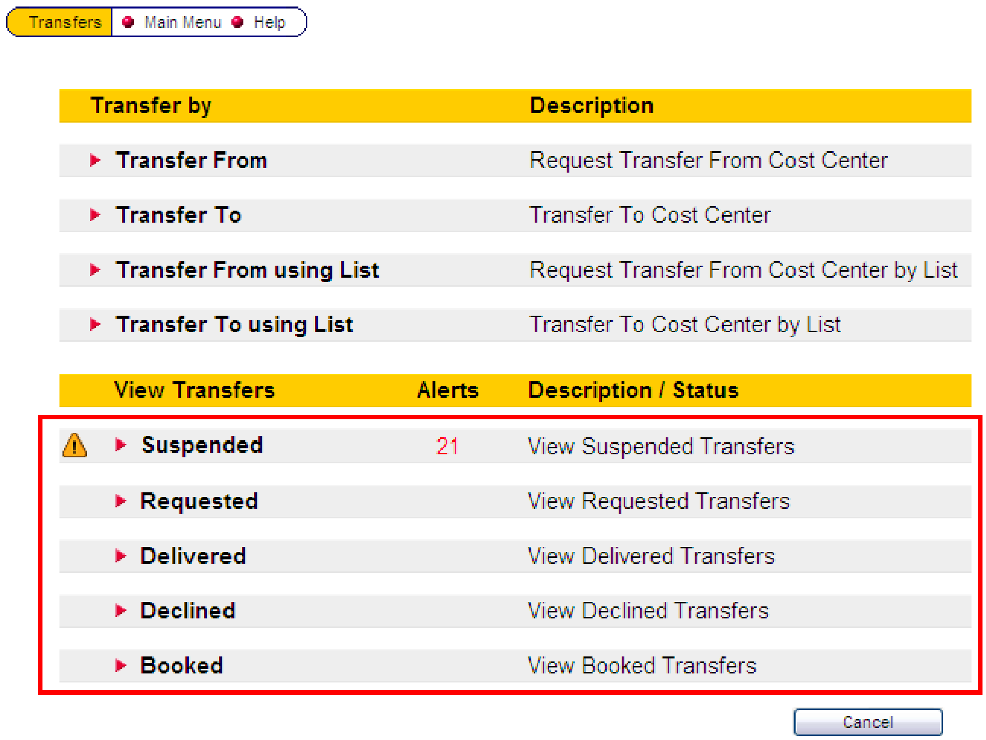
There are 5 different statuses a Transfer document can have:

1. Suspended

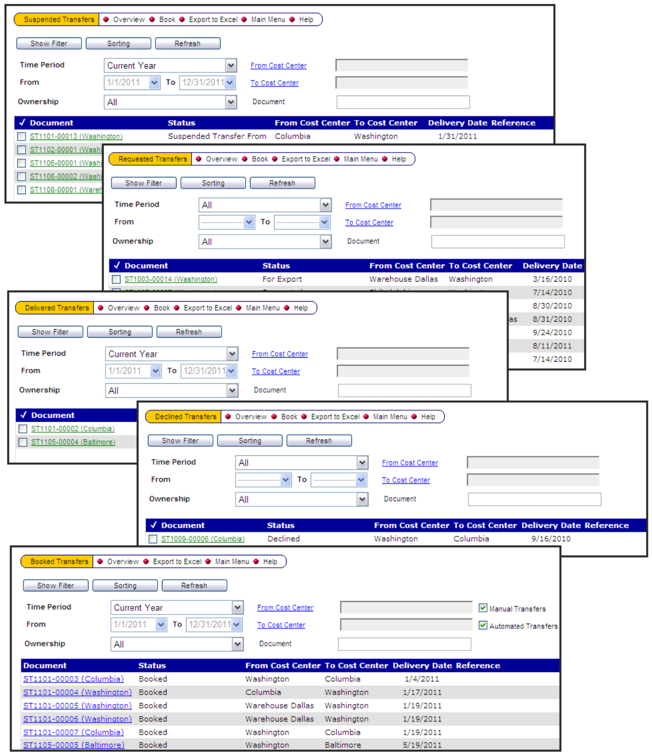
2. Requested
3. Delivered
4. Declined
5. Booked

The steps required to view Transfers are the same regardless of what type of Transfer is selected. To view a Transfer:

1. Select Suspended, Requested, Delivered, Declined or Booked from the Transfer Overview window:



2. Select the Document Name – use filters if no records are available:



Note	*Only Booked Transfers will appear in blue; all other Transfers, regardless of status, will appear in green*

3. The Detail page will be displayed, where Transfers may be modified

Note	*Not all records can be modified. For example, Approved and Booked Transfers may only be reviewed and/or printed. Declined Transfers may be modified. Approved/Requested Transfers may be Accepted or Declined.*

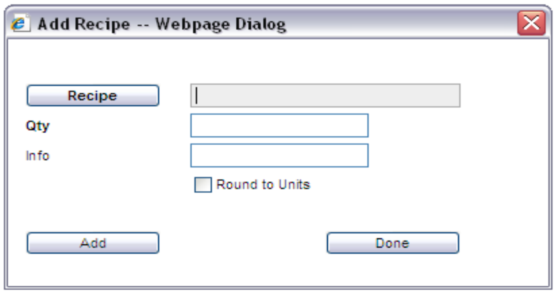
Adding Individual Items to a Transfer

To add Items, please refer to the Add Items section of this document.

Add Recipes to Transfer

You can also add Recipes to the Transfers if you want to Transfer a Recipe as a whole of Ingredients. This helps track the costs of Transfers “per portion” of a Recipe cost basis. To add Recipes to a Transfer entry:

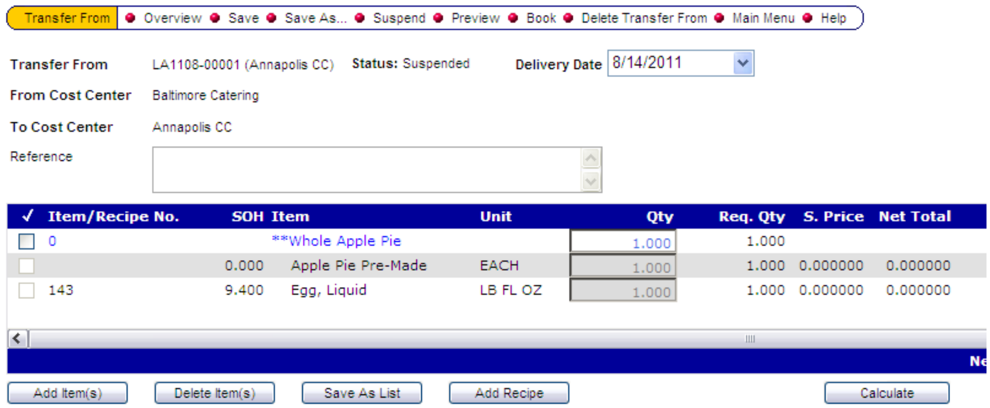
1. Click the name of the Transfer document you want to modify from the Document column
2. Click Add Recipe from the Transfers Detail window; the Add Recipe window will be displayed:



3. In the Recipe field, enter the name of the Recipe you want to add to the Transfer. If you want to see a list of all the Recipes you can enter, place the cursor in the Recipe field and press Enter. A window will be displayed with the Recipes you can select from. Choose the Recipe you want to Transfer and click OK.
4. In the Qty field, enter the quantity of portions of the Recipe you want to Transfer. Quantity, in this case, is by portion. If the Recipe is for a cup of soup, and a bowl of soup equals 2 cups of soup, and you are Transferring a bowl of soup, you would Transfer 2 portions of the Recipe.
5. In the Info field, add any information you want to be included with this Recipe to appear in the Transfer document:

6. Enable Round to Units if, when the Recipe is to be delivered, it must be rounded to its nearest Base Unit measurement
7. Click Add

8. Continue to add Recipes or click Done – the Transfers Detail window will be updated to reflect the recently added Recipe(s), with each Item listed below:

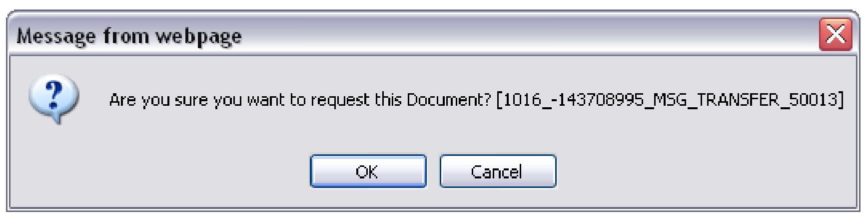


Book a Transfer

To book a Transfer document:

1. From the Transfer Detail window, from the Top Menu Bar, click Book.

   The Booking confirmation dialog will be displayed.



Note	*Depending on whether or not you are the location requesting or transferring, this dialog box may have a different message.*

2. Click OK.

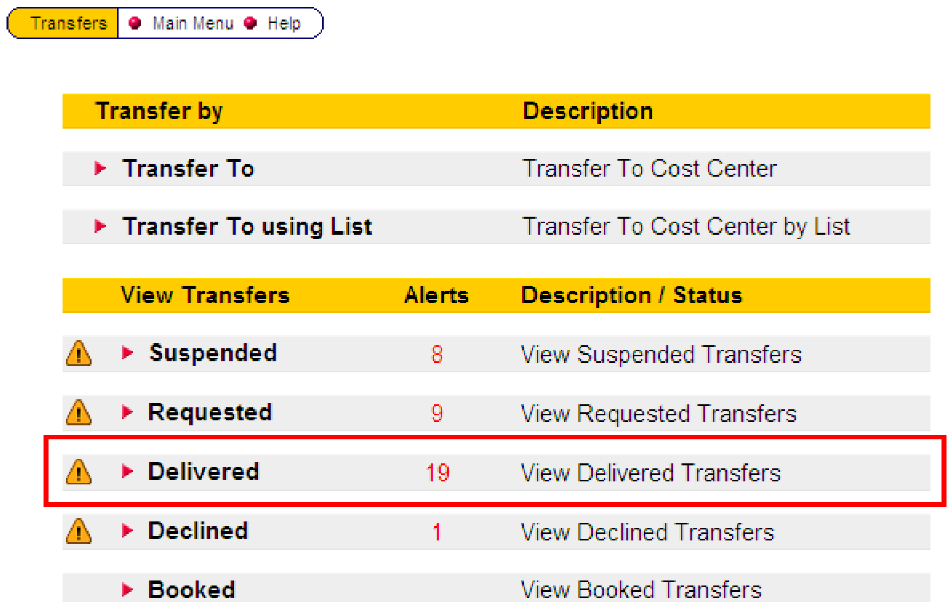
The Transfer document is booked and the Transfer Overview screen will be refreshed with the booked Transfer.

Note	*When a Transfer is Booked, depletions from inventory are instantaneous*

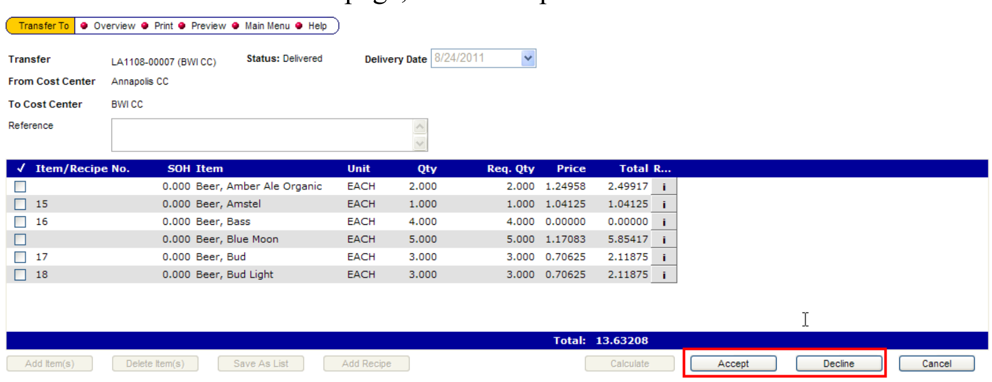
Accept/Decline a Transfer

If a location has requested a Transfer from your store, then you are the Transferring store. It is your decision as to whether or not you would like to provide the requested goods. Based on how a destination store is configured, it may have the privilege of accepting or declining a Transfer. To allow stores to use the Accept/Decline process, the Using Transit option must be enabled in Master Data | Cost Centers. To Accept/Decline a transfer:

1. From the Transfers Overview page, click Delivered:



2. Select the Document Name of the Transfer
3. From the Transfer Detail page, click Accept or Decline



Note *The User who booked the Transfer cannot be the User who Accepts or Declines the Transfer.*

Issue Requests

The Issue Requests Module is only for use if you are not using the Transfers To/From Module described immediately before this section. If you are using the Issue Requests Module, then you are also using the Transfers Module (detailed in the following section).

Introduction and Overview

Issue Requests work hand-in-hand with Transfers. The idea of an Issue Requests is that one store can request product from another store and have an accurate record of the transaction.

The following is an example of how the Issue Requests and Transfers Modules work together when both Cost Centers have Sys Admin level User Rights. Store A requests product from Store B using only myinventory:

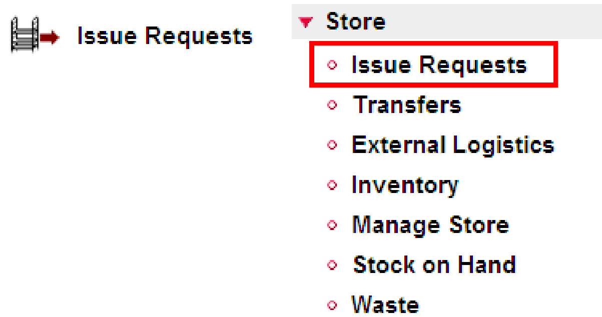
1. Step 1: Once Store A clicks Book in the Issue Requests module, Store A can view the Request as Not Booked | Requested in the Issue Requests module. When Store B wants to see the status of the Transfer, Store B opens the Transfer module and sets the filters to show Not Booked | Requested. That is the status of the order from Store B's point of view.
2. Step 2: Store B goes into the Transfer Request from store A and books it. At this point in Store B, it appears in the Transfers module as Not Booked | Delivered, and in Store A it shows in the Issue Requests module as Not Booked | Delivered.
3. Step 3: Store A then has to go into Issue Requests and open the delivered Request and click accept or decline. Once they accept it, it goes to Issue Requests Booked in Store A and to Transfers Booked for Store B. This is when stock depletion takes place in the system. Had the Transfer been declined by Store A, it would appear in the Not Booked | Declined under Issue Requests for Store A and under Transfers for Store B.

In the scenario above, Step 1 may be skipped if Store A elects to contact Store B in an alternate manner, such as calling them on the telephone. In the event of that, Store B would create a Transfer (see Transfers, Section 7).

For Step 3, depending on the User Rights, the ability to accept or decline may not be available. In this case, once the Issue Request is booked in Transfers, the status might go directly to "Booked" if a User is unable to decline a Transfer. And, if the Transfer cannot be declined, the accepting the Transfer is automatic.

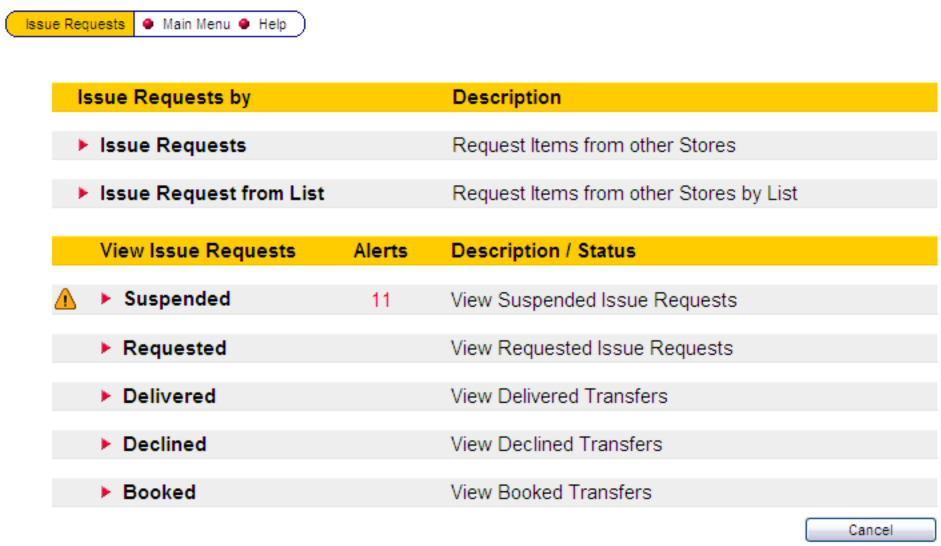
Access the myinventory Issue Requests Module

From the Main Menu, click the Issue Requests icon or select Issue Request from beneath the Store Level tasks to access the module:



The Issue Requests Overview Window

The Issue Requests Overview window is the first window you will see after accessing the Issue Requests icon from the main myinventory window.



Issue Requests/ Transfer Process

Issue Requests and Transfers work in conjunction with each other. The Issue Requests/Transfer process is a very cyclical one.

In the situation where an Issue Requests is made, the process flows somewhat like:

1. Request is made by a Cost Center in need
2. Request is received by the potential Transferring Cost Center. The status will be identified as Not Booked | Requested
3. Transferring Cost Center reviews the Items requested and can do one of 4 things:

   a. Approve the Requested Items
   b. Modify the totals Requested
   c. Zero out all the totals
   d. Delete the Transfer
4. Transferring Cost Center books the Request (changing its status to Not Booked | Delivered)
5. Requesting Cost Center receives the booked Transfer in the Not Booked | Delivered status
6. Requesting Cost Center either approves the Transfer (modifications and all) or declines the Transfer.

The Accept and Decline options become available at the bottom of the Issue Requests Detail page for the Delivered Issue Request.

Note *Depending on User Rights, the store my not be able to accept/decline the Request/Transfer. If this is the case, the Request/Transfer will be automatic.*

Only after the Requesting store accepts the Transfer will any stock on hand totals be modified. If the Requesting Store declines the Transfer, no stock on hand totals will be changed

Create Issue Requests

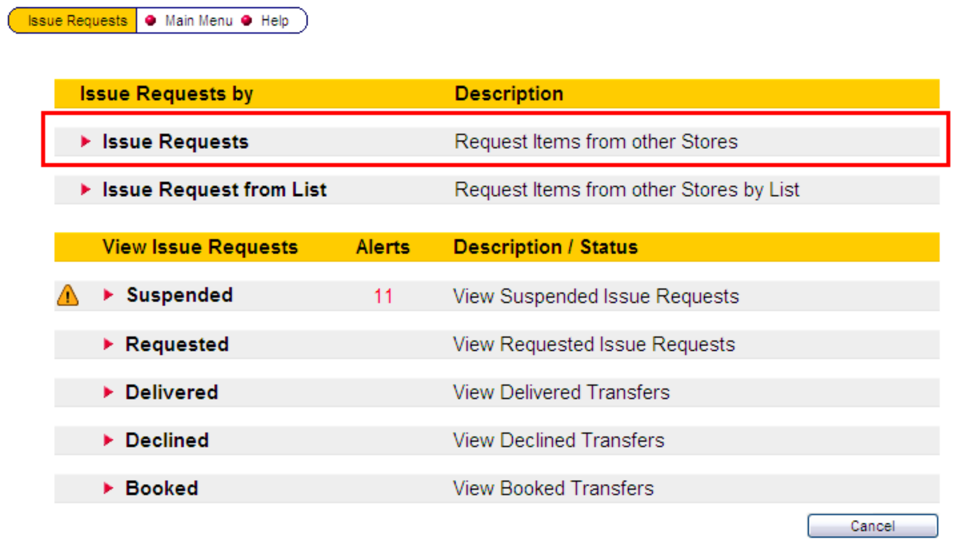
You can create Issue Requests 2 ways:

1. Issue Requests – this allows you to create Issue Requests for destination locations and add any Items necessary
2. Issue Requests from List – this option allows you to create Issue Requests for destination locations based on existing Lists

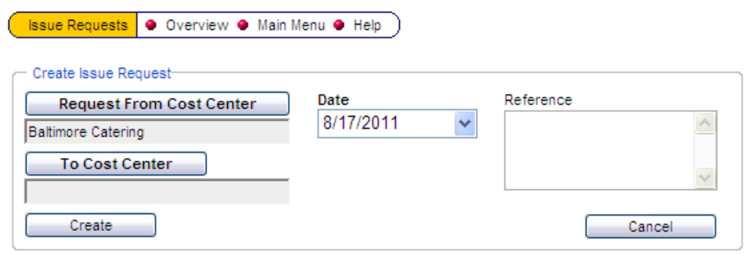
Create an Issue Request

Issue Request enables the User to specify which location will be sending the merchandise or what store the goods are being Issued from. To create an Issue Request:

1. Select Issue Requests from the Issue Requests Overview window:



2. Enter a location in the Request From Cost Center field, modify the date, specify any pertinent information in the Reference field (optional) and click Create:



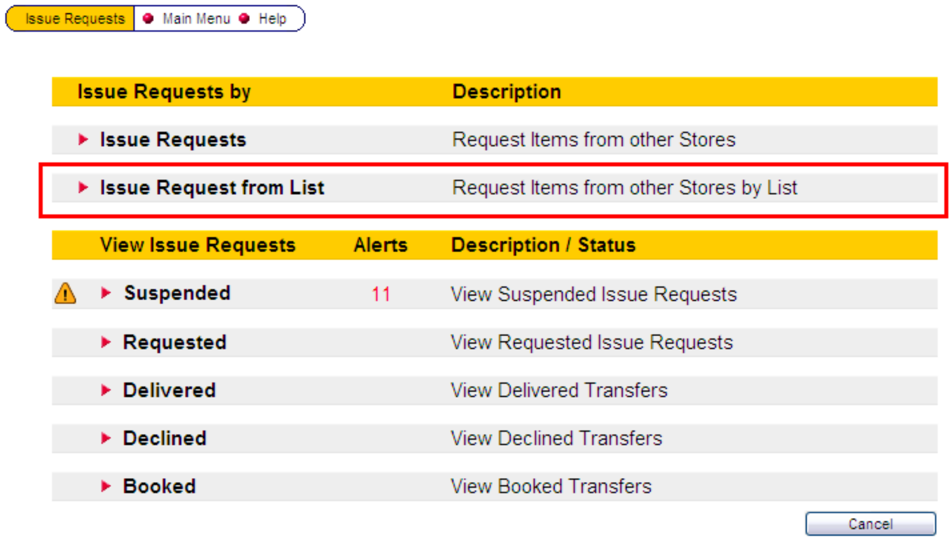
Note	*If Cost Center Areas are used, the To Cost Center must be defined first so that the system may filter the Cost Centers that are able to Transfer to them in the Request From field.*

3. From the Issue Requests Detail window, begin adding any Items/Recipes as required; when you have finished, you may save the Issue Request or, to send it to the location, click Book

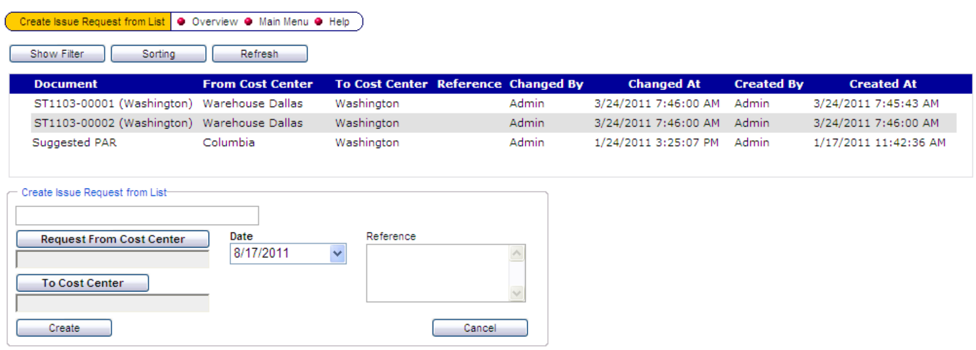
Create an Issue Request from List

Issue Request from List enables the User to specify which location will be sending the merchandise or what store the goods are being Issued from. To force stores to use the Cost Center that the List was created for, enable the Configuration option USECOSTCENTERFROMLIST in Maintenance | Configuration. There is an additional User Right in the Store Section of Maintenance | User Management | Manage Rights that will allow a User to override this Configuration option. To create an Issue Request from List:

1. Select Issue Request from List from the Issue Requests Overview window:



2. Select an existing list from the Document column, enter/modify the location in the Request From Cost Center field and the To Cost Center field, modify the date, specify any pertinent information in the Reference field (optional) and click Create:



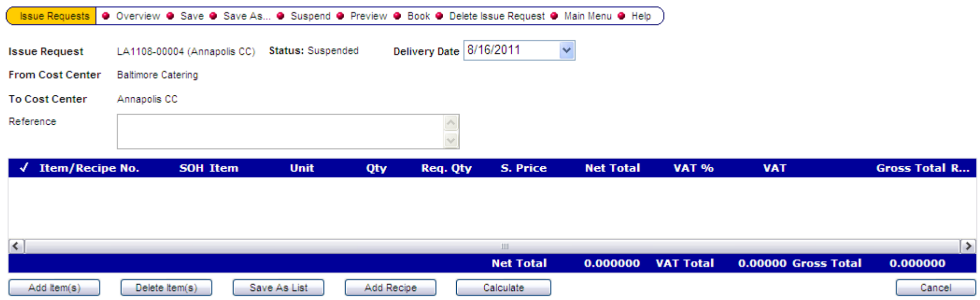
3. From the Issue Requests Detail page, you may modify or add any Items/Recipes as required; when you have finished, you may save the Issue Request from List or, to send it to the location, click Book

---

Note *When using an Issue Request From List that has suggested quantities enabled, a second delivery date will be assigned. This behavior is similar to Ordering by suggested quantities.*

The Issue Requests Detail Page

The following section describes the Issue Requests Detail window.



Top Menu Bar

Menu Item	Description
Overview	Go to the subject area overview.
Save	Saves the Issue Request document
Save As…	Allows you to suspend the Issue Request document, rename it, and continue working on the Issue Request document under its new name.
Suspend	This feature allows you to save the document and returns you to the Overview window where you can continue working on this suspended document at another time. Suspended documents are highlighted with the color green.
Book	Select this option to book the Issue Request
Preview	Allows you to preview the information in print format and print if necessary
Delete Issue Request	Deletes the current Issue Request document and returns you to the Overview window. A Source Store can always delete an Issue Request. Destination Store can delete an Issue Request if they no longer need the product(s)
Main Menu	Return to the Main myinventory Menu.
Help	Launch the Help file.

Additional Screen Elements

Screen Element	Description
Add Item(s)	Use this to add Items to the Issue Request Detail window.
Delete Item(s)	To delete an Item/Recipe, first select an Item(s) or Recipe(s) by checking the check box to the left of the Item. Then click Delete Item(s) to delete Items from the Issue Request document.
Save As List	Use this to keep the Issue Request document currently open for future use as a template or list. This list will show up on the Issue Request Overview window and will be highlighted with the color blue. You can click a list to begin creating an Issue Request entry that is pre-established or routine.
Add Recipe	Allows you to add a Recipe to the Issue Request. If a Recipe is selected, the Ingredients are being Requested, not the Recipe itself.
Calculate	Use this whenever you want a Total for your Issue Request document to display at the bottom of the Detail page
Cancel	Cancels the current Issue Request document

Information Bar

Screen Element	Description
Item/Recipe No.	Displays the Item or Recipe number
SOH	Displays the stock-on-hand of the Item
Item	Displays the Item name
Unit	Displays the Unit of Measure
Qty	Allows you to enter the quantity of the Item to be Requested
Req. Qty	Displays the quantity that was originally Requested

Screen Element	Description
S. Price	Displays the cost of the Item per unit of measure. The S. Price is used when the sending Cost Center is configured to use Sales Price for Transfer (found in Master Data | Cost Centers). The Sales Price is then defined in Master Data | Items | Sales Price. If Use Sales Price on Transfer is not enabled, the normal cost is used for the Transfer.
Net Total	Displays the total Net cost of the Item
VAT%	Displays the Tax percentage for the Item
VAT	Displays the Tax value for the Item
Gross Total	Displays the total Gross cost of the Item
R...	If there is any information about this Item, then the “i” will be red

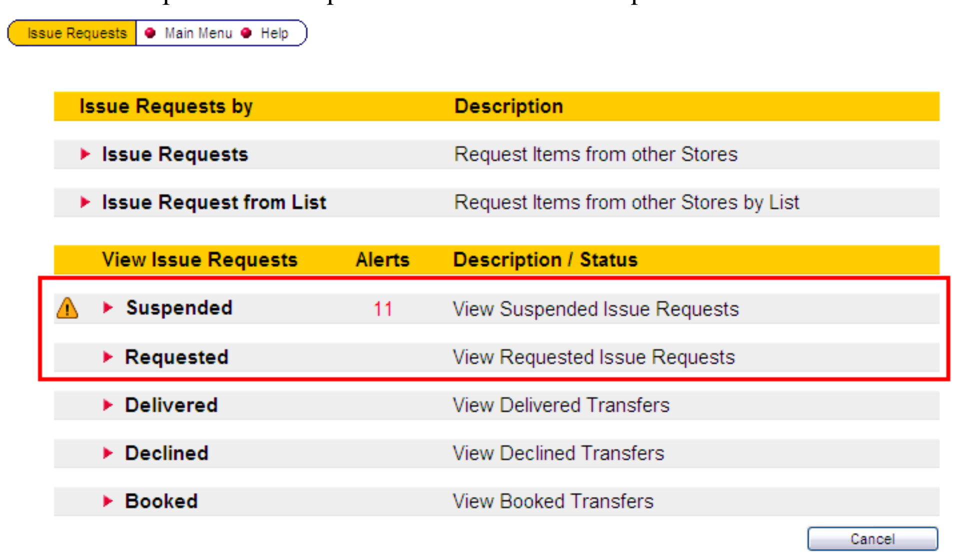
Viewing Issue Requests

There are 2 types of Issue Requests:

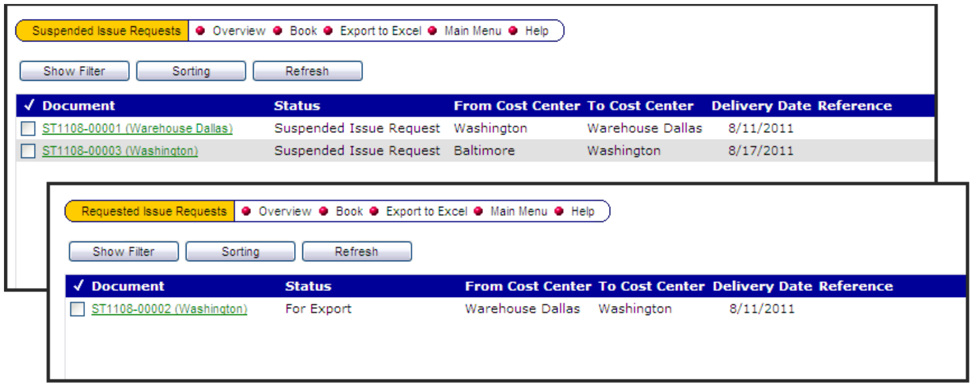
1. Suspended
2. Requested

The steps required to view Issue Requests are the same regardless of what type of Issue Request is selected. To view an Issue Request:

1. Select Suspended or Requested from the Issue Request Overview window:



2. Select the Document Name – use filters if no records are available:



3. The Detail page will be displayed, where Issue Requests may be modified

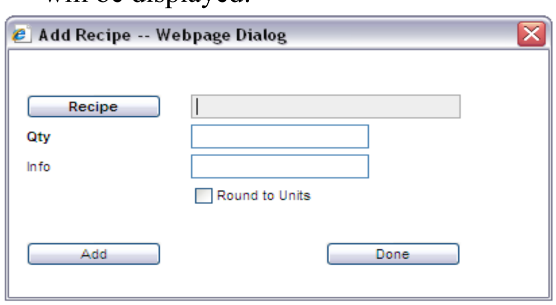
Adding Individual Items to an Issue Request

To add Items, please refer to the Add Items section of this document.

Add Recipes to an Issue Request

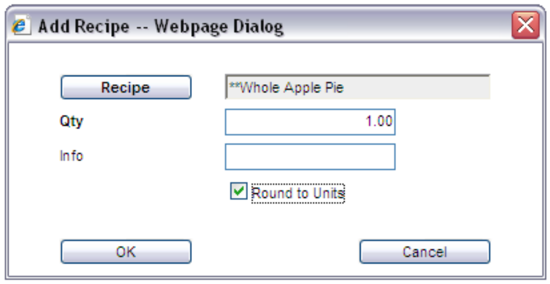
You can also add Recipes to the Issue Request if you want to Request a Recipe as a whole of Ingredients. This helps track the costs of Issue Requests "per portion" of a Recipe cost basis. To add Recipes to an Issue Request entry:

1. Click the name of the Issue Request entry you want to modify from the Document column.
2. Click Add Recipe from the Issue Requests Detail page; the Add Recipe window will be displayed:



3. In the Recipe field, enter the name of the Recipe you want to add to the Issue Request. If you want to see a list of all the Recipes you can enter, place the cursor in the Recipe field and press Enter. A window will be displayed with the Recipes you can select from. Choose the Recipe you want to Request and click OK.

4. In the Qty field, enter the quantity of portions of the Recipe you want to Request. Quantity, in this case, is by portion. If the Recipe is for a cup of soup, and a bowl of soup equals 2 cups of soup, and you are Requesting a bowl of soup, you would Request 2 portions of the Recipe.
5. In the Info field, add any information you want to be included with this Recipe to appear in the Issue Request Entry:



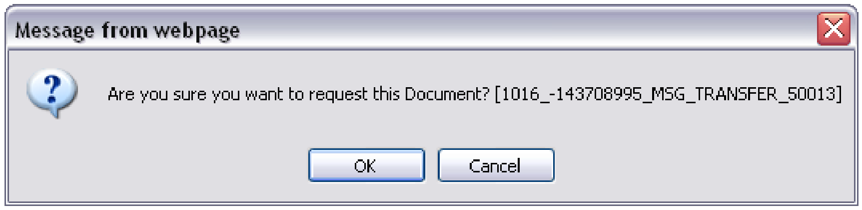
6. Enable Round to Units if, when the Recipe is to be delivered, it must be rounded to its nearest Base Unit measurement.
7. Click OK
8. Continue to add Recipes or click Done – the Issue Requests Detail page will be updated to reflect the recently added Recipe(s), with each Item listed below:

Book an Issue Request

To book an Issue Request document:

1. From the Issue Request Detail window, from the Top Menu Bar, click Book

The Booking confirmation dialog will be displayed.



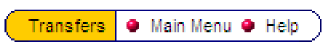
2. Click OK

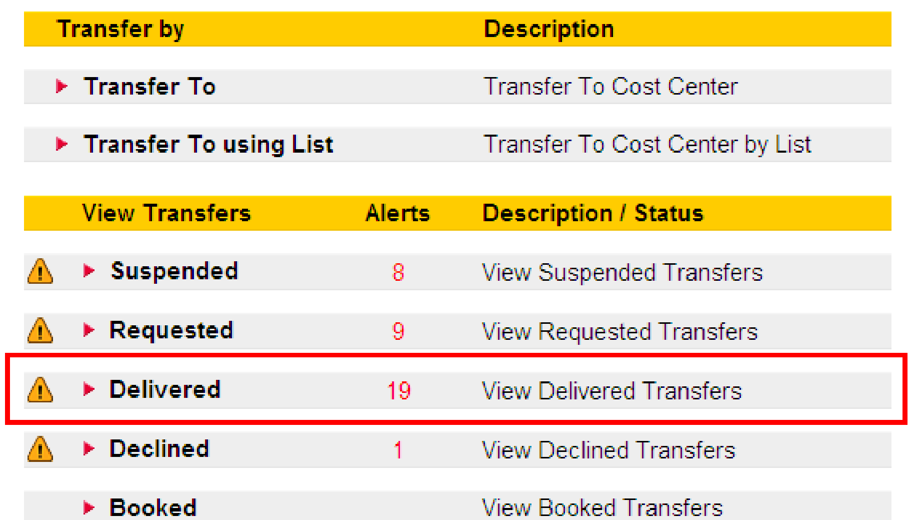
The Issue Request document is booked and the Issue Request Overview screen will be refreshed with the booked Issue Request document.

Accept/Decline an Issue Request

If a location has requested an Issue Request from your store, then you are the Transferring store. It is your decision as to whether or not you would like to provide the goods/product requested of you. Based on how a destination store is configured, it may have the privilege of accepting or declining an Issue Request. To allow stores to use the Accept/Decline process, the Using Transit option must be enabled in Master Data | Cost Centers. To Accept/Decline an Issue Request:

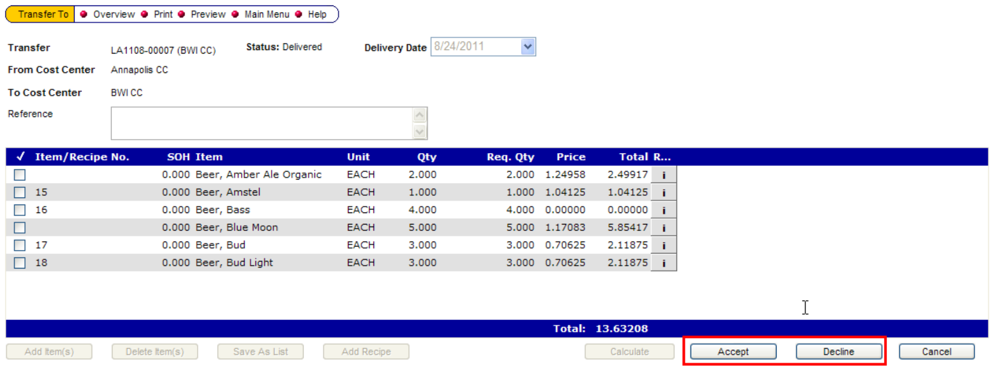
1. From the Issue Requests Overview page, click Delivered:





2. Select the Document Name of the Issue Request

3. From the Issue Request Detail page, click Accept or Decline:



Note *The User who booked the Issue Request cannot be the User who Accepts or Declines the Issue Request.*

Delete an Issue Request

To delete an Issue Request, please refer to the Deleting a Document section of this document.

Transfers

The Transfers Module is only for use if you are not using the Transfers To/From Module described immediately before this section. If you are using the Transfers Module, then you are also using the Requisitions Module (detailed in the following section).

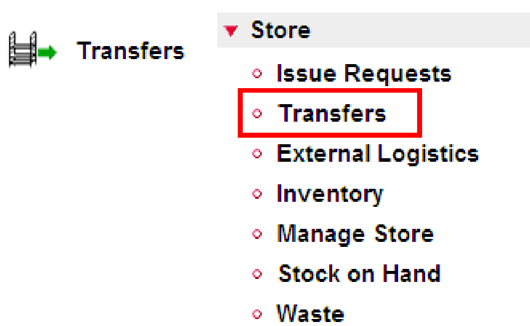
Introduction and Overview

Forget about those handwritten IOU's or the pad of pre-printed inter-store transfer slips. myinventory provides an automated method for transferring product from one location to another. Checks and balances have been built in preventing fraud from either the transferring or the receiving location.

Depending on security settings, a manager has the ability to view stock on-hand of various nearby locations, which saves numerous calls to stores while looking for a product to hold them over until an upcoming delivery. It also gives Regional and Corporate management the ability to view product across all locations. With this tool, overstock product can be moved from location to location. Moving overstock product allows valuable cash from being tied up in inventory and at the same time ensures fresh product in each location.

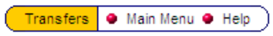
Access the myinventory Transfers Module

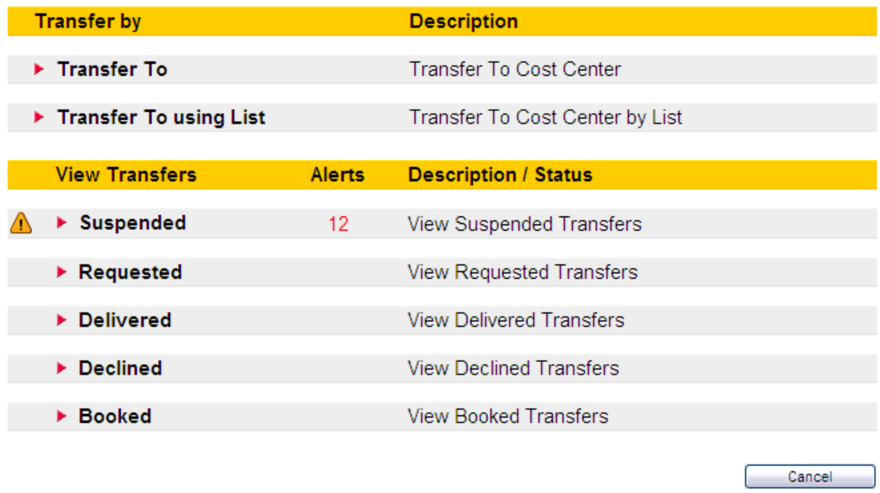
From the Main Menu, click the Transfers icon:



The Transfers Overview Window

The Transfers Overview window is the first window you see after clicking the Transfers icon:





Transfer/ Requisition Process

Requisitions and Transfers work in conjunction with each other. The process would flow somewhat like:

1. Transfer is created by a Cost Center
2. Receiving store (for lack of better term) will review the suggested Transfer through the Requisition Module and can do one of 2 things:
   a. Accept the Transfer
   b. Decline the Transfer

By accepting the Transfer, the requesting store is essentially giving the Transfer store permission to deliver the Items. If the requesting store declines the Transfer, no Items will be delivered to them from the Transfer store.

Note *Depending on User Rights, the store my not be able to accept/decline the Request/Transfer. If this is the case, the Request/Transfer will be automatic.*

Only after the requesting store accepts the Transfer will any stock on hand totals be modified. If the requesting store declines the Transfer, no stock on hand totals will be changed.

Create Transfers

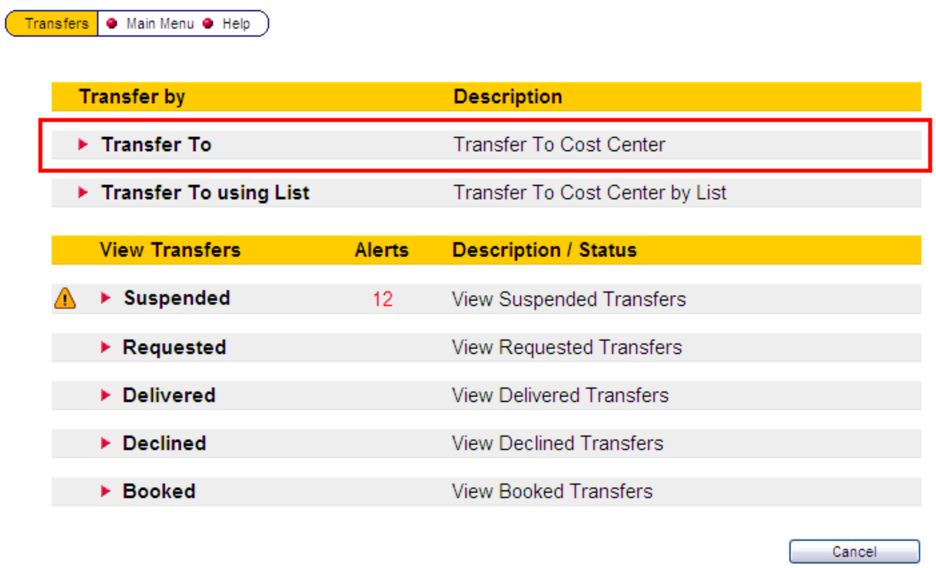
You can create Transfers 2 ways:

1. Transfer To – this allows you to create Transfers for destination locations and add any Items necessary
2. Transfer To using List – this option allows you to create Transfers for destination locations based on existing Transfer Lists

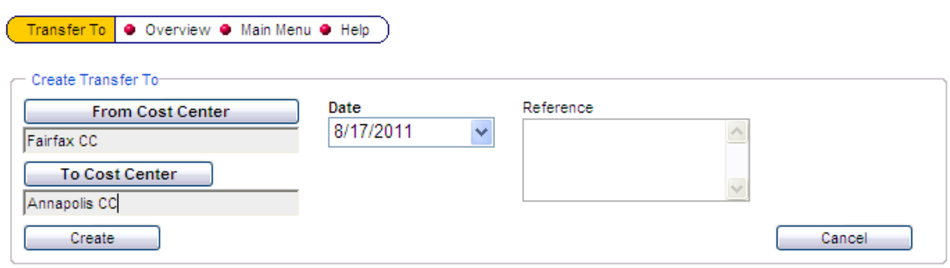
Create a Transfer To

"Transfer To" enables the User to specify which location will be receiving the merchandise or what store the goods are being Transferred to. To create a Transfer To:

1. Select Transfer To from the Transfers Overview window:



2. Enter a location in the To Cost Center field, modify the date, specify any pertinent information in the Reference field (optional) and click Create:

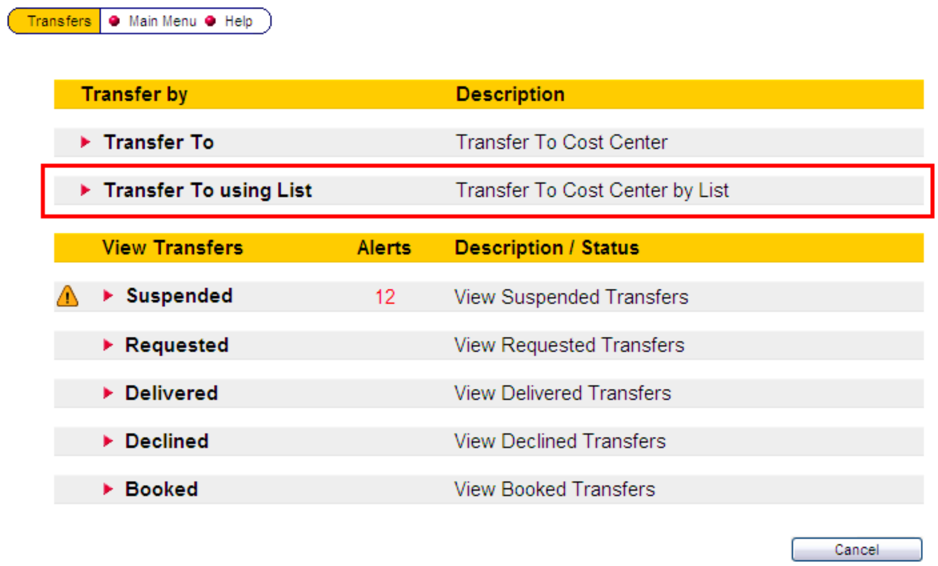


3. From the Transfers To Detail window, begin adding any Items/Recipes as required; when you have finished, you may save the Transfer To or, to send it to the location, click Book

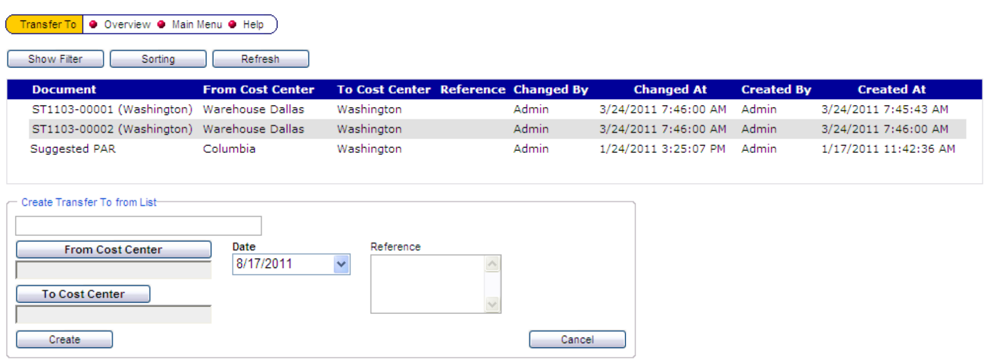
Create a Transfer To using List

"Transfer To using List" enables the User to specify which location will be receiving the merchandise or what store the goods are being Transferred to. To force stores to use the Cost Center that the List was created for, enable the Configuration option USECOSTCENTERFROMLIST in Maintenance | Configuration. There is an additional User Right in the Store Section of Maintenance | User Management | Manage Rights that will allow a User to override this Configuration option. To create a Transfer To Using a List:

1. Select Transfer To using List from the Transfers Overview window:



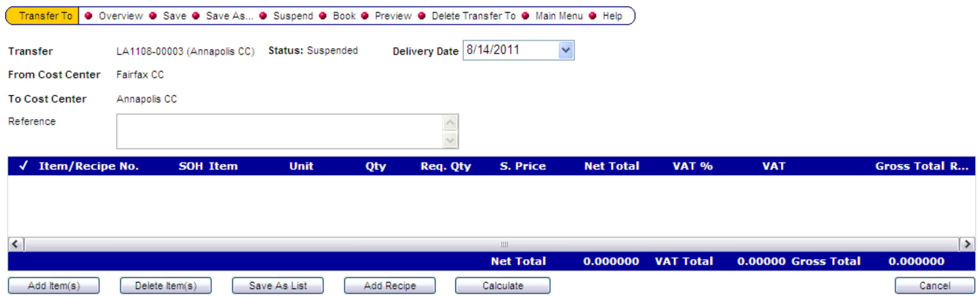
2. Select an existing List from the Document column, enter/modify the location in the From Cost Center field and the To Cost Center field, modify the date, specify any pertinent information in the Reference field (optional) and click Create:



3. From the Transfer To Detail page, you may modify or add any Items/Recipes as required; when you have finished, you may save the Transfer To using List or, to send it to the location, click Book

The Transfers Detail Page

The following section describes the Transfer From/To Detail window:



Top Menu Bar

Menu Item	Description
Overview	Go to the subject area overview.
Save	Saves the Transfer entry
Save As…	Allows you to suspend the Transfer entry, rename it, and continue working on the Transfer entry under its new name.
Suspend	This feature allows you to save the entry and returns you to the Overview window where you can continue working on this suspended entry at another time. Suspended entries are highlighted with the color green.
Book	Select this option to book the Transfer
Preview	Allows you to preview the information in print format and print if necessary
Delete Transfer To	Deletes the current Transfer entry and returns you to the Overview window. A Source Store can always delete a Transfer (From or To). Destination Store can delete a Transfer if they no longer need the product(s)
Main Menu	Return to the Main myinventory Menu.
Help	Launch the Help file.

Additional Screen Elements

Screen Element	Description
Add Item(s)	Use this to add Items to the Transfer Detail window.
Delete Item(s)	To delete an Item/Recipe, first select an Item(s) or Recipe(s) by checking the check box to the left of the Item. Then click Delete Item(s) to delete Items from the Transfer entry.
Save As List	Use this to keep the Transfer document for future use as a template or list. This list will show up on the Transfer Overview window and will be highlighted with the color blue. You can click a list to begin creating a Transfer document that is pre-established or routine.
Add Recipe	Allows you to add a Recipe to the Transfer. If a Recipe is selected, the Ingredients are being Transferred, not the Recipe itself.
Calculate	Use this whenever you want a Total for your Transfer document to display at the bottom of the Detail page
Cancel	Cancels the current Transfer document

Information Bar

Screen Element	Description
Item/Recipe No.	Displays the Item or Recipe number
SOH	Displays the stock-on-hand of the Item
Item	Displays the Item name
Unit	Displays the Unit of Measure
Qty	Allows you to enter the quantity of the Item to be Transferred
Req. Qty	Displays the quantity that has been requested for Transfer

Screen Element	Description
S. Price	Displays the cost of the Item per unit of measure. The S. Price is used when the sending Cost Center is configured to use Sales Price for Transfer (found in Master Data | Cost Centers). The Sales Price is then defined in Master Data | Items | Sales Price. If Use Sales Price on Transfer is not enabled, the normal cost is used for the Transfer.
Net Total	Displays the total Net Cost of the Item
VAT%	Displays the Tax percentage for the Item
VAT	Displays the Tax value for the Item
Gross Total	Displays the total Gross Cost
R...	If there is any information about this Item, then the “i” will be red

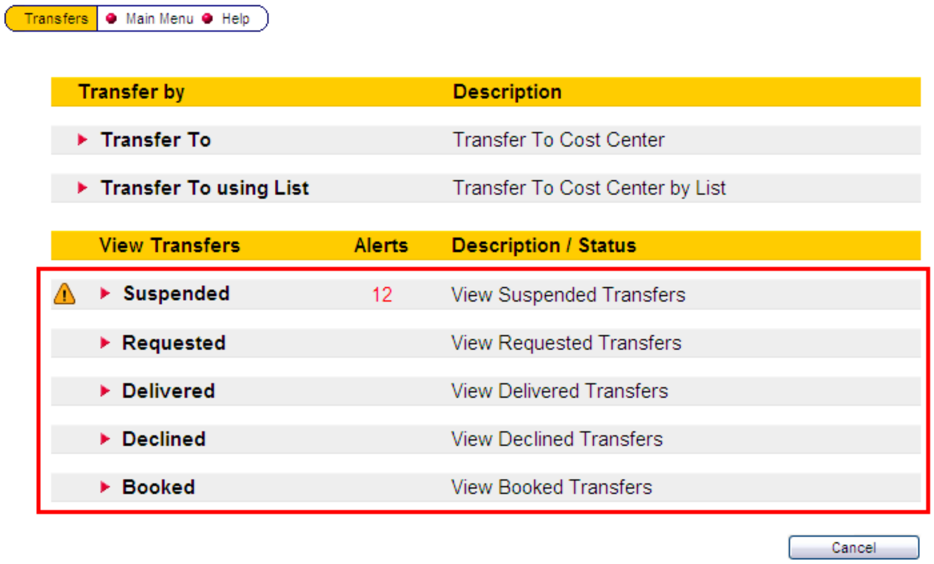
Viewing Transfers

There are 5 different statuses a Transfer document can have:

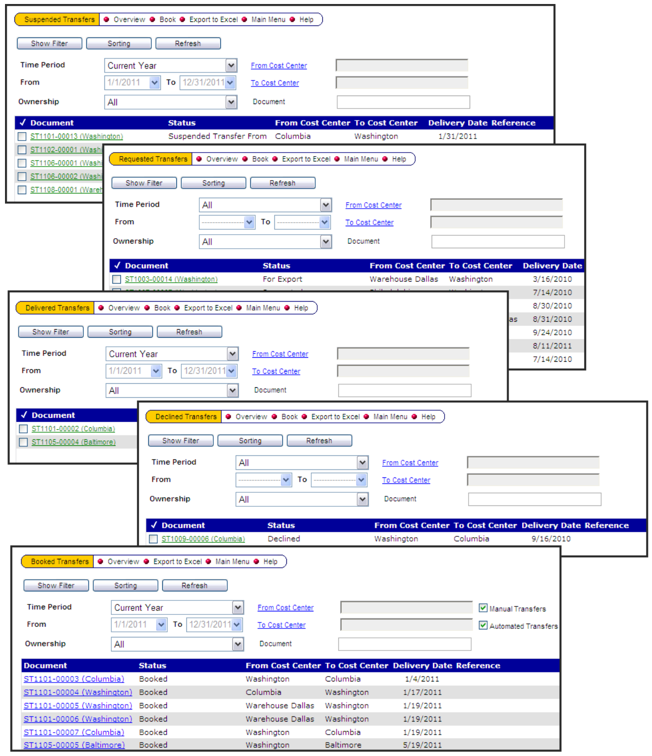
1. Suspended
2. Requested
3. Delivered
4. Declined
5. Booked

The steps required to view Transfers are the same regardless of what type of Transfer is selected. To view a Transfer:

1. Select Suspended, Requested, Delivered, Declined or Booked from the Transfer Overview Page



2. Select the Document Name – use filters if no records are available:



Note	*Only Booked Transfers will appear in blue; all other Transfers, regardless of status, will appear in green*

3. The Detail page will be displayed, where Transfers may be modified

Note	*Not all records can be modified. For example, Approved and Booked Transfers may only be reviewed and/or printed. Declined Transfers may be modified. Approved/Requested Transfers may be Accepted or Declined.*

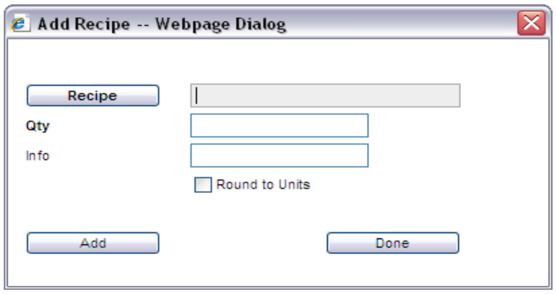
Adding Individual Items to a Transfer

To add Items, please refer to the Add Items section of this document.

Add Recipes to Transfer

You can also add Recipes to the Transfer if you want to Transfer a Recipe as a whole of Ingredients. This helps track the costs of Transfers “per portion” of a Recipe cost basis. To add Recipes to a Transfer document:

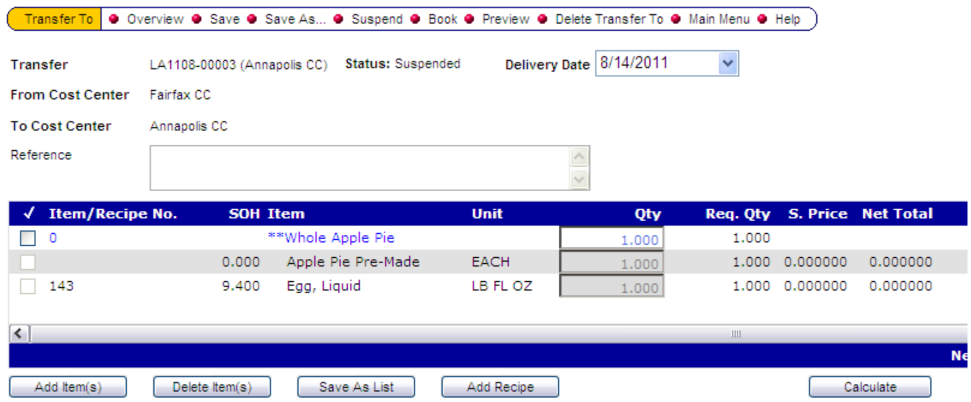
1. Click the name of the Transfer document you want to modify from the Document column.
2. Click Add Recipe from the Transfers Detail window; the Add Recipe window will be displayed:



3. In the Recipe field, enter the name of the Recipe you want to add to the Transfer. If you want to see a list of all the Recipes you can enter, place the cursor in the Recipe field and press Enter. A window will be displayed with the Recipes you can select from. Choose the Recipe you want to Transfer and click OK.
4. In the Qty field, enter the quantity of portions of the Recipe you want to Transfer. Quantity, in this case, is by portion. If the Recipe is for a cup of soup, and a bowl of soup equals 2 cups of soup, and you are Transferring a bowl of soup, you would Transfer 2 portions of the Recipe.
5. In the Info field, add any information you want to be included with this Recipe to appear in the Transfer document:

6. Enable Round to Units if, when the Recipe is to be delivered, it must be rounded to its nearest Base Unit measurement
7. Click Add

8. Continue to add Recipes or click Done – the Transfers Detail window will be updated to reflect the recently added Recipe(s), with each Item listed below:

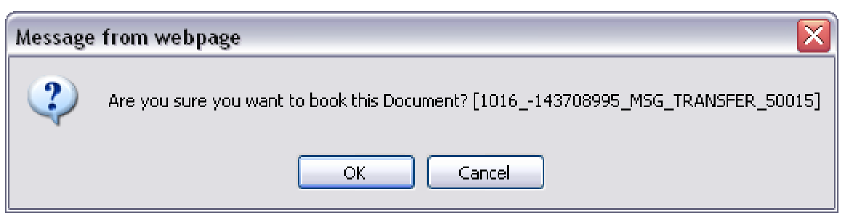


Book a Transfer

To book a Transfer document:

1. From the Transfer Detail window, from the Top Menu Bar, click Book

   The Booking confirmation dialog will be displayed.



2. Click OK

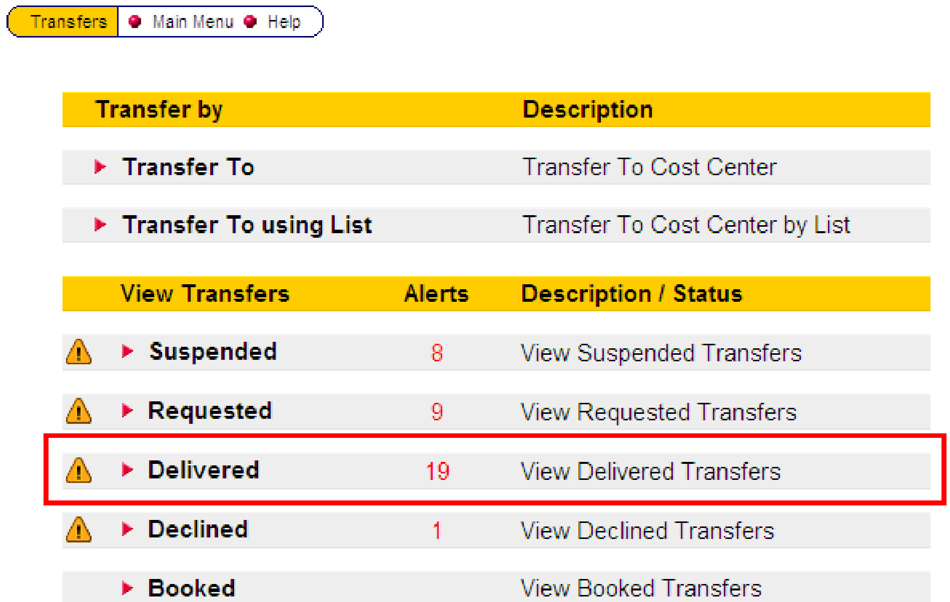
The Transfer document is booked and the Transfer Overview screen will be refreshed with the booked Transfer

Note	*When a Transfer is Booked, depletions from inventory are instantaneous*

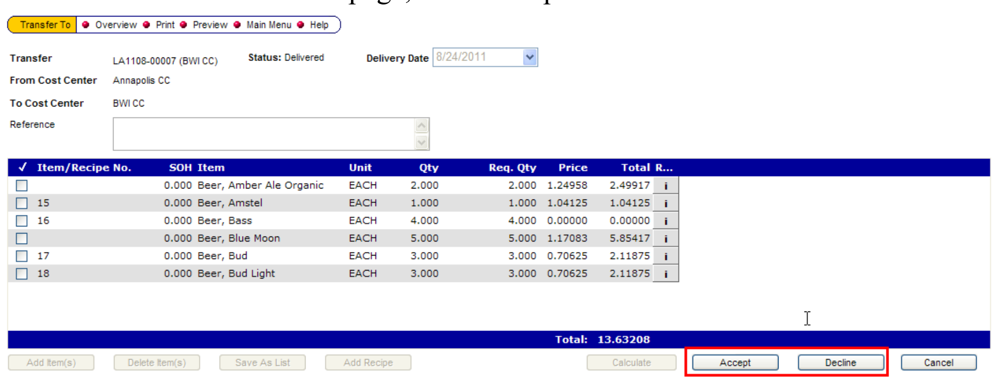
Accept/Decline a Transfer

If a location has requested a Transfer from your store, then you are the Transferring store. It is your decision as to whether or not you would like to provide the goods/ product requested of you. Based on how a destination store is configured, it may have the privilege of accepting or declining a Transfer. To allow stores to use the Accept/Decline process, the Using Transit option must be enabled in Master Data | Cost Centers. To Accept/Decline a Transfer:

1. From the Transfers Overview window, click Delivered:



2. Select the Document Name of the Transfer
3. From the Transfer Detail page, click Accept or Decline



Note	*The User who booked the Transfer cannot be the User who Accepts or Declines the Transfer.*

Delete a Transfer

To delete a Transfer, please refer to the Deleting a Document section of this document.

Inventory

Introduction and Overview

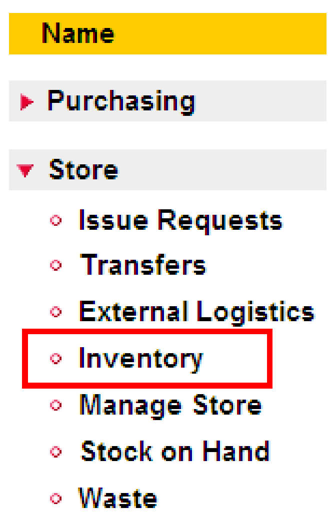
Pack away the old paper count sheets and custom spreadsheets. myinventory puts online count and extension capability at your fingertips. For multi-unit operators, can you imagine having access to all ending inventories instantaneously upon completion? No more unreadable faxes or waiting for the costly Fed Ex® envelope to arrive.

Along with the normal end of period (day, week, month …) capability, the system also allows for spot checks to be taken on high ticket items. Further enhancing the benefits, count sheets can be setup in stock counting order to properly reflect the way product is stored in each of the count areas.

Count sheets can be viewed and printed either by Item Group (meat, poultry, seafood, beer …) or Storage Location (cooler, freezer, back bar …). Depending on the security settings configured for each User, the system offers the ability to display theoretical values, variances, and prices for each of the Inventory Items.

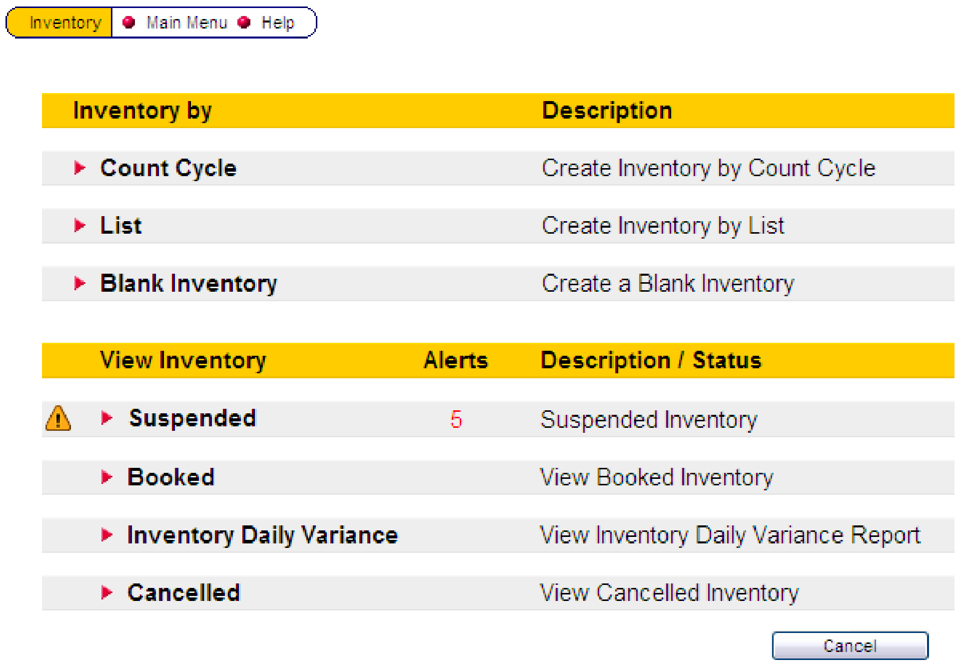
Access the myinventory Inventory Module

From the Main Menu, click the Inventory icon or select the Inventory option under Store functions:



The Inventory Overview Window

The Inventory Overview window is the first window you see when you access the Inventory Module:



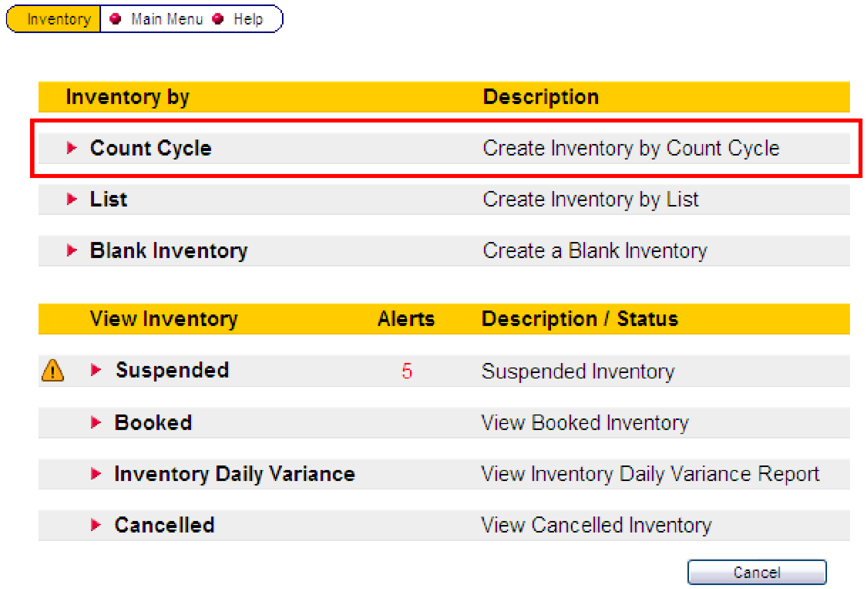
Create an Inventory

There are 3 methods by which you can create an Inventory Count:

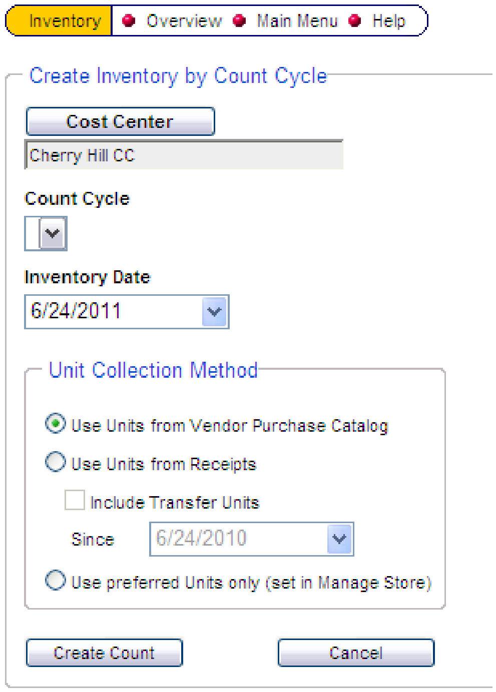
1. By Count Cycle
2. By List
3. By Blank Inventory

Create an Inventory by Count Cycle

1. Click the Count Cycle option from the Inventory Overview window

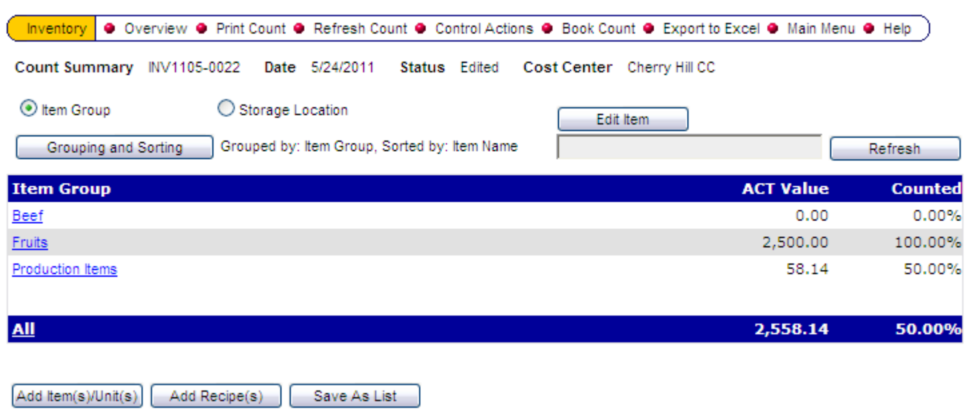


2. Enter a Cost Center, specify a Count Cycle, enter an Inventory Date, and select a Unit Collection Method:



Note	*You may only create an Inventory by Count Cycle for days that are valid within the Cycle, i.e. an End of Month Inventory may be created for 8/31 but not 8/30.*

3. Click Create Count; the Inventory Count Detail page is displayed:

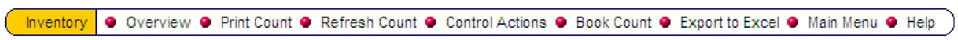


Note	*You cannot have 2 concurrent Counts containing the same Item.*

Inventory Count Detail Page

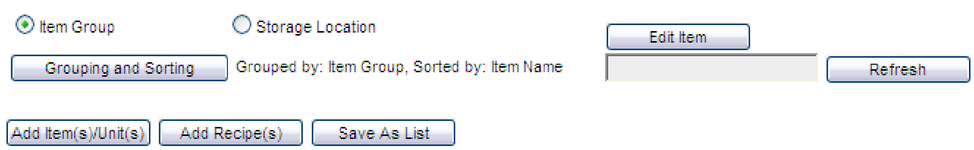
There are two views for the Inventory Count Detail page; the User may view by Item Group or by Storage Location. The Top Menu Bar and the top portion of the page are the same. The headers in the Information Bar vary depending on selection. The following details the features and functionality of the Inventory Count Detail page. From this page you may edit, delete, cancel, and book Inventory Counts.

The Top Menu Bar



Menu Item	Description
Overview	Go to the subject area overview
Print Count	Prints the current Count to a PDF file
Refresh Count	Refreshes the current Count and updates it with any recent changes you have made
Control Actions	Generates a PDF that details any open documents, such as Orders or Receipts, that may affect the outcome of the Inventory Count if they are not closed
Book Count	This will book your Inventory Count
Main Menu	Return to the Main myinventory Menu
Help	Launch the Help file

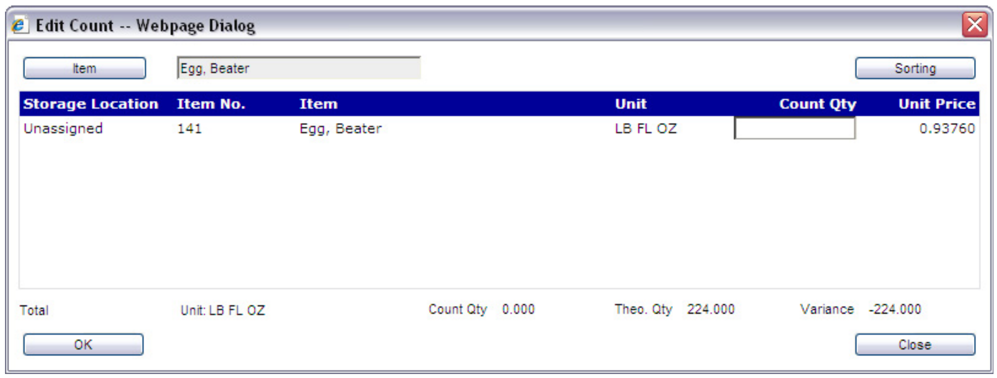
Additional Screen Elements



Screen Element	Description
Item Group	Select this option to view Inventory Counts by Item Group; click Refresh to view
Storage Location	Select this option to view Inventory Counts by Storage Location; click Refresh to view
Grouping and Sorting	Use this to modify the grouping/sorting of Items in the Count; this button **does not** change the actual Items
Add Item(s)/Unit(s)	Use this to add Items or Units to the current Count
Add Recipe(s)	Use this to add Recipes to the current Count
Save as List	Saves the current Inventory Count as a List for use in the future

Screen Element	Description
Edit Item	Use this quick entry field to update an Item without having to open an Item Group/Storage Location. Type an Item in the field and press Enter to open the quick entry window, where you will be able to update the Item's Count quantity
Refresh button	Click this button to refresh changes you may have made to the interface

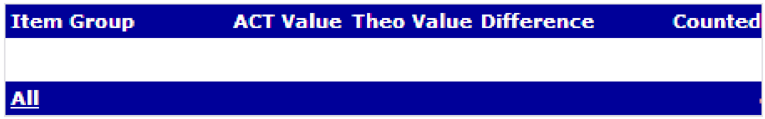
Quick Entry Count Edit



If an Item's count quantity needs to be updated but you do not want to navigate through the entire Item Group, you may use the Quick Entry Count Edit field located in the Count Summary window.

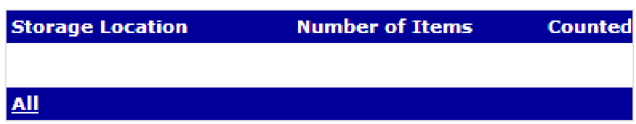
1. Enter an Item in the Edit Item field on the Count Summary page; the Edit Count Web page Dialog box will be opened.
2. Enter the new Count Qty and select OK to make the change.
3. Select Close to exit and return to the Count Summary page. The Item will be updated in the Inventory as per your changes.

Information Bar - by Item Group



Screen Element	Description
Item Group	Displays the name of the Item Group; selecting the Item Group will enable you to edit/enter the counts for each Item
ACT Value	Displays the value of the Inventory Count as currently entered
Theo Value	Displays the value of the Inventory you should have
Difference	Shows the value between what you should have vs. what the actual amount is
Counted	Percentage of how much Inventory has been counted in that Item Group
All	Clicking this option will expand/show all account detail for the Item Groups included in the Inventory Count

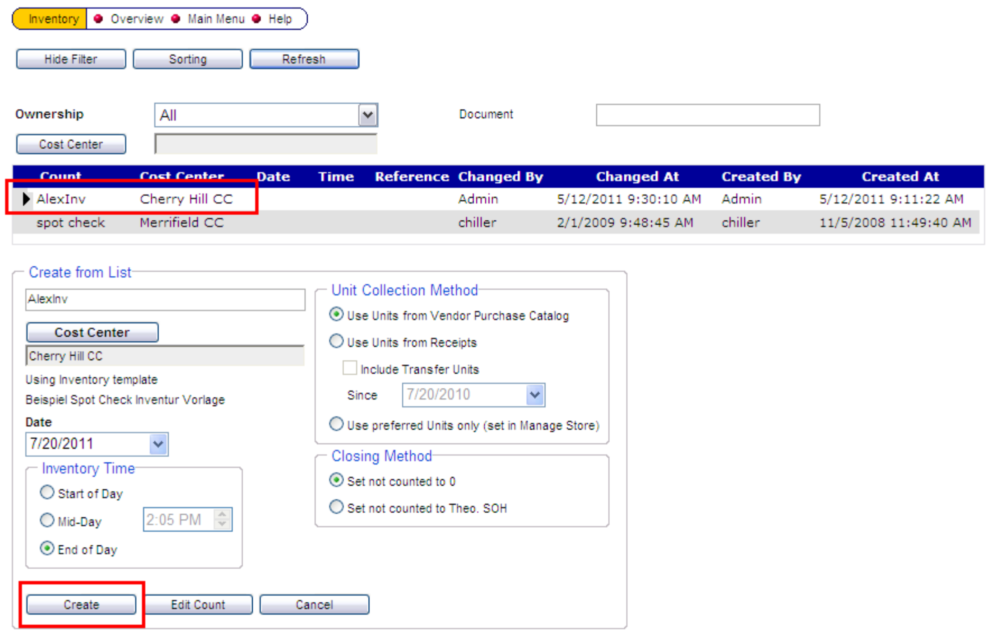
Information Bar – by Storage Location



Screen Element	Description
Storage Location	Displays the name of the Storage Location where the Inventory Items may be found
Number of Items	Displays the number of Inventory Items located in the Storage Location
Counted	Displays the percentage of Inventory Items in the Storage Location with respect to all of the Items in all of the Storage Locations
All	Clicking this option will expand/show all account detail for the Storage Locations

Create an Inventory Count by List

1. Select List from the Inventory Overview page
2. Select an Inventory Count, assign a Cost Center, modify the date and time, and click Create; all Items in the selected List will be included in the Inventory Count



Inventory Time	Description
Start of Day	Uses Stock on Hand from previous day
Mid Day	Use for spot checks throughout the day. Booking a Mid Day Count will not update the Stock on Hand.
End of Day	Use for Inventory Counts that occur at the close of the business day. Booked Counts will update the Stock on Hand for the end of that business date

Note *If you would like to edit any of the Items in the Inventory Count List, select the Edit Count button before clicking Create; this will open a page wherein the List may be modified.*

When you have finished editing from this page, you may click Create Count from the Top Menu Bar to move back to the Inventory Overview window.

3. From the Inventory Count Detail window, click an Inventory Count to see the Items within it; from this page, you may edit/add new Items.
4. When you have finished making modifications, click Book Count from the Top Menu Bar

Create a Blank Inventory Count

1. Select Blank Inventory from the Inventory Overview page
2. Enter a Cost Center (if not already done), modify the date and time (if necessary)
3. Select Item Groups to be assigned to the Inventory Count (hold CTRL for multiple selections at one time); when finished, click Create – all Items in the Item Group(s) will be available in that Inventory Count

Note	*If you would like to edit any of the Items in the Inventory Count List, select the Edit Count button before clicking Create; this will open a page wherein the Item Group may be modified.* *For more on this, please see Edit Items on an Inventory Count*

You will be taken to the Inventory Count Detail page.

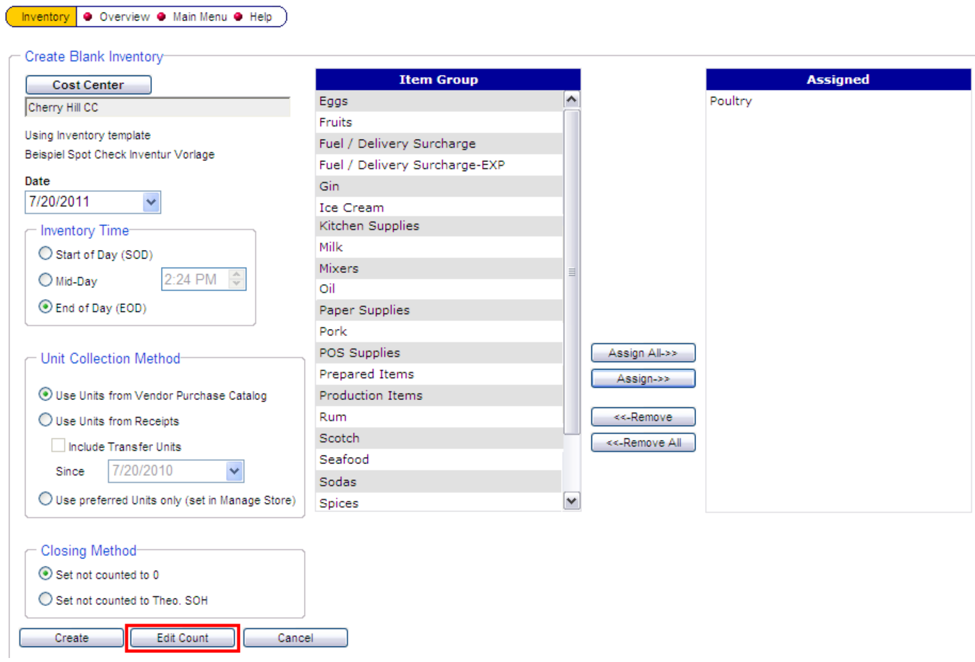
Edit Items on a Newly Created Inventory Count

There may be times when you wish to create an Inventory Count, but not include all of the Items in a particular Item Group. When you create an Inventory Count and specify an Item Group, every Item in that Item Group will be assigned to the Count if you do not edit it first. Of course, you can go back later and edit, but myinventory provides the ability to edit the Count while creating it.

For example, you may want to count all of your Turkey Poultry products but not your Chicken Poultry products. The myinventory application provides this functionality.

Example:

1. Assign the Poultry Item Group to the Inventory about to be created and click the Edit Count button:



2. Use the boxes to the left of the Item Group to select which Items will be excluded from the Inventory Count.

3. Select Delete Item(s) and then OK in the confirmation dialog box

4. The screen will refresh and display only the remaining Turkey Items. Click Create Count from the Top Menu Bar:

Note	*Please note that you can save this Inventory Count as a List to be used for future Counts. To do this, click the Save as List button from the Edit Inventory Count page.*

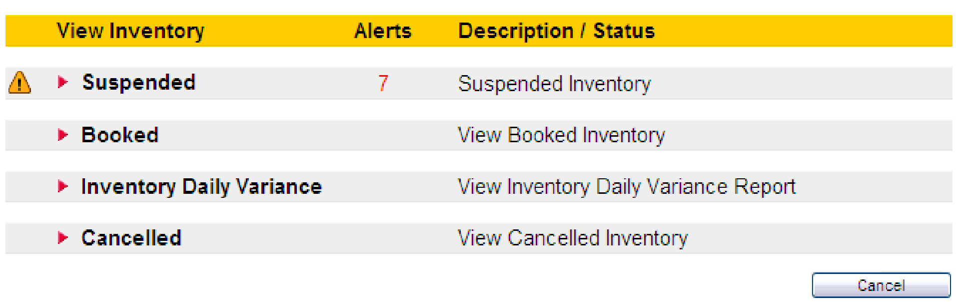
Viewing Inventory Counts

There are 3 different classifications of Inventory Counts:

1. Suspended
2. Booked
3. Cancelled

The steps required to view these Inventory Counts are similar, regardless of what type of Count. Of course, your selection determines what type of Count you will view. To view an Inventory Count:

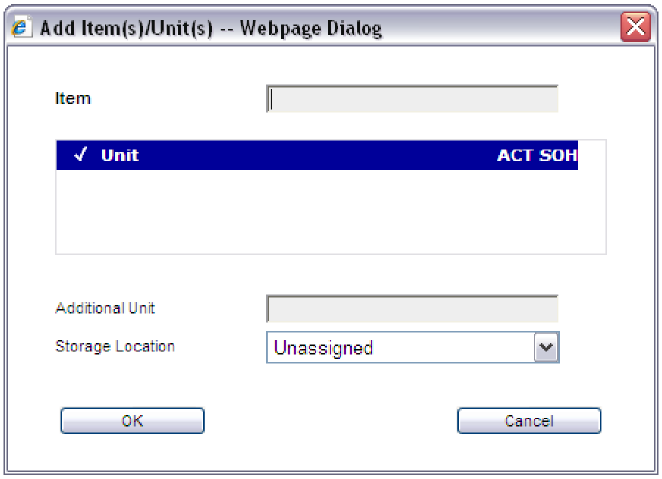
1. Select Suspended, Booked, or Cancelled from the Inventory Overview window:



2. Select a Document Name from the available selections within the Count type
3. The Inventory will be displayed in the Detail window

Add Items to an Inventory Count

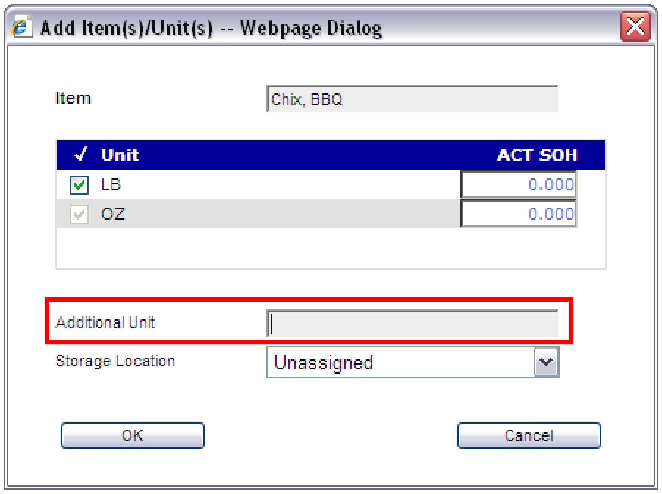
1. Click the Add Item(s)/Unit(s) button from the Inventory Detail window. The Add Item(s) Window will be displayed.



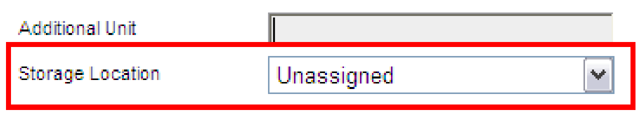
2. To add an Item, select the Item field, place the cursor in the field and click enter. A list will be displayed from which you can select the Items you wish to add.
3. Select the Item you want to add and click OK. The Add Items window will be populated with the selected Item and the default amount.

4. You can add additional Units for the given product by placing the cursor in the Additional Units field and pressing enter.

5. Select any additional Units and click OK.



Note *If you are using Advanced Storage Locations, your Add Item(s)/Unit(s) window will have a Storage Location field on it under the Additional Unit field:*



If you want to enter a Storage Location for the Item, choose a Storage Location from the drop-down list. If no Storage Location is selected, the Item will appear in its pre-defined Storage Location

6. Once you have completed the entry for this Item, click OK.

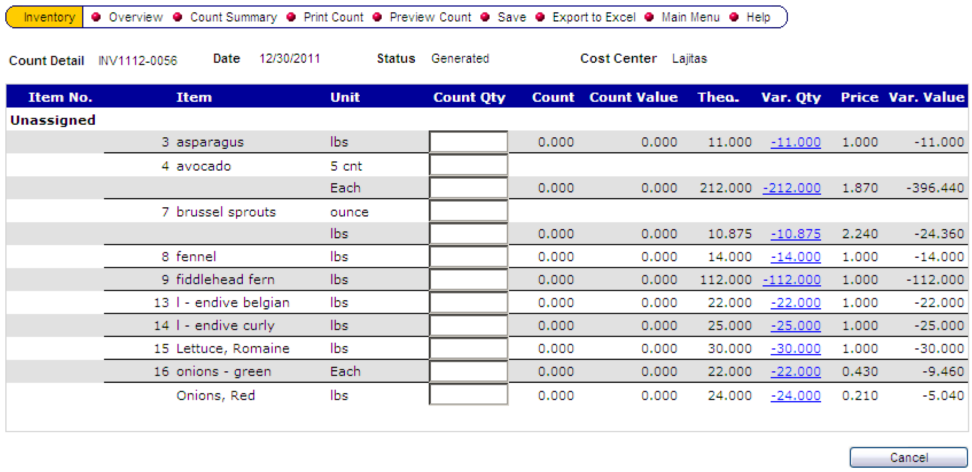
The Add Items window will be displayed. If you are finished entering new Items, click cancel.

You will be returned to the Inventory Detail window. Click the Refresh button for the Items you just added to be displayed in the Detail window.

Enter the Counts for Each Item

To enter or change the count for an individual Item:

1. Click the name of the Item Group or Storage Location for the Item you want to count from the Inventory Detail window; the Count Detail window appears.



Item No.	Item	Unit	Count Qty	Count	Count Value	Theo.	Var. Qty	Price	Var. Value
Unassigned									
3	asparagus	lbs		0.000	0.000	11.000	-11.000	1.000	-11.000
4	avocado	5 cnt							
		Each		0.000	0.000	212.000	-212.000	1.870	-396.440
7	brussel sprouts	ounce							
		lbs		0.000	0.000	10.875	-10.875	2.240	-24.360
8	fennel	lbs		0.000	0.000	14.000	-14.000	1.000	-14.000
9	fiddlehead fern	lbs		0.000	0.000	112.000	-112.000	1.000	-112.000
13	l - endive belgian	lbs		0.000	0.000	22.000	-22.000	1.000	-22.000
14	l - endive curly	lbs		0.000	0.000	25.000	-25.000	1.000	-25.000
15	Lettuce, Romaine	lbs		0.000	0.000	30.000	-30.000	1.000	-30.000
16	onions - green	Each		0.000	0.000	22.000	-22.000	0.430	-9.460
	Onions, Red	lbs		0.000	0.000	24.000	-24.000	0.210	-5.040

Note *The All link at the bottom left of the Inventory Overview screen will open all Groups or Locations assigned in the Count.*

2. Enter the quantity amount in the Count Qty column. This is the field where you are entering the actual amount of Item X counted in the location. Click Save in the Top Menu Bar.

You can return to the Overview window by clicking Overview in the Top Menu Bar.

Grouping and Sorting Counts

Within the Inventory Detail window, you can group Items in the Count by:

- Item Group
- Storage Location

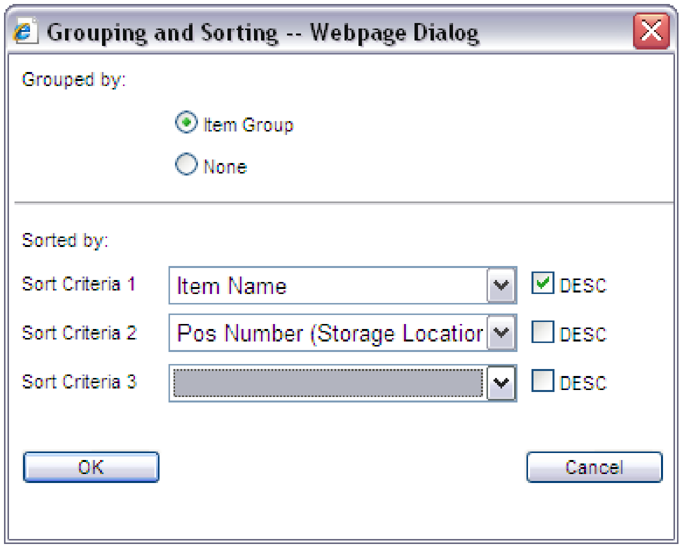
You can sort Items by:

- Item Name
- Item Number
- Pos Number (for use with Storage Locations)

Tips & Tricks *MICROS recommends grouping and sorting be set **globally** by a System Administrator, especially if Storage Locations/ sorts are being used. This ensures that every time a Count is opened, the options will not need to be changed individually.*

To set these options:

1. Click the Grouping and Sorting button from the Inventory Detail window; the Grouping and Sorting window is displayed:



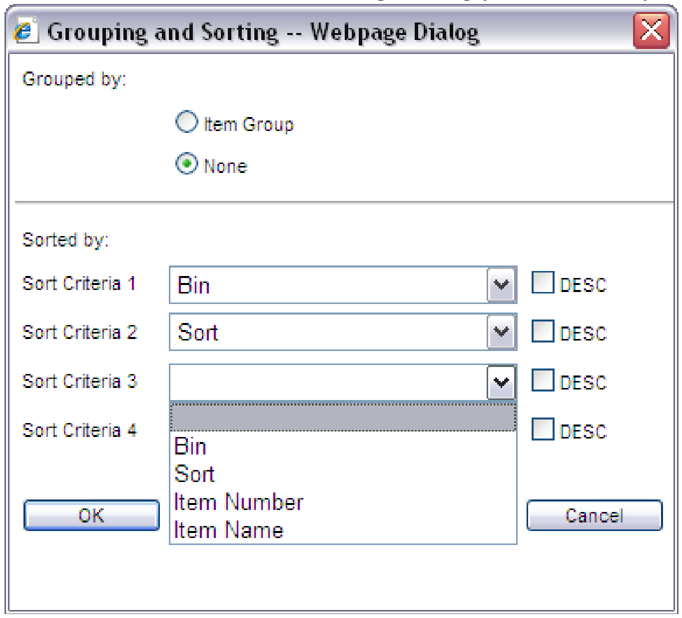
2. Set the Grouping and Sorting options you would prefer to use

Note	*When using Storage Locations, Grouped By should be set to* ***None*** *and Sorted By should be set to* ***POS, Item Name****.*

3. Click OK

The Items in the Inventory Detail window are re-sorted according to the criteria you configured.

When using Advanced Storage Locations, you have the ability to sort by two additional criteria used when organizing your Inventory: Bin and Sort:

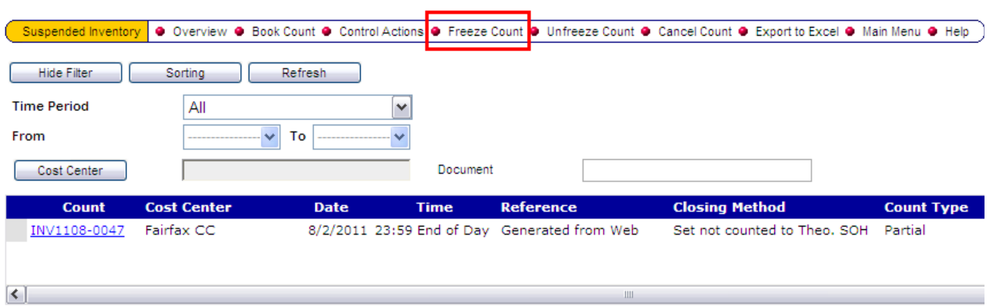


Freeze/Unfreeze the Count

An Inventory Count may be "Frozen" to preserve its status and quantities entered, which gives a manager time to check the data before it is booked.

From the Suspended Inventory Window

1. Select the Count to Freeze by clicking to the left of the Inventory Count name:



2. Click Freeze Count from the Top Menu Bar
3. Click OK to confirm the action
4. Once the Count has been reviewed by necessary parties, select Unfreeze Count to either make changes or prepare for booking

Book the Count

There are two places where Inventory Counts may be booked. They are the Inventory Overview window and the Summary Screen.

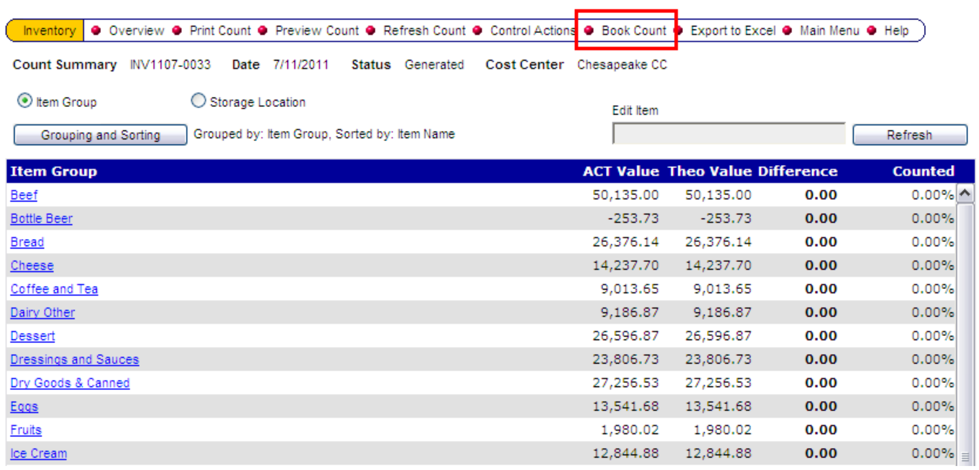
From the Suspended Inventory Window

1. Select the Count to be booked by clicking to the left of the Inventory Count name.

2. Click Book Count from the Top Menu Bar
3. Click OK to confirm the booking action
4. Click OK again to acknowledge the completed operation

From the Inventory Detail Screen

1. Select the Inventory Count name from the Suspended Count List; the Inventory Detail window will be displayed:



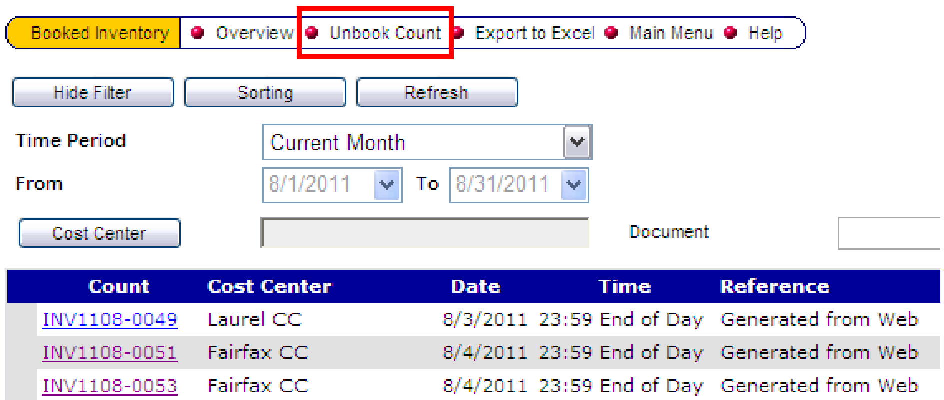
2. Select Book Count from the Top Menu Bar
3. Click OK to confirm the booking action
4. Click OK again to acknowledge the completed operation

You can view any of your organization's Booked counts by selecting the Booked menu option in the Inventory Overview window.

Un-book an Inventory Count

Inventory Counts may also be “unbooked”. You will only be able to unbook the most recently booked Count. In order to unbook a Count:

1. Select a Booked Count and click Unbook Count from the Top Menu Bar



2. Click OK from the confirmation dialog box

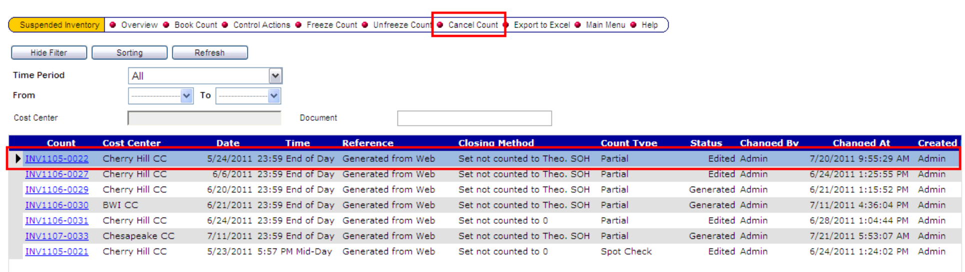
The Inventory Count has now been un-booked

Cancel a Count

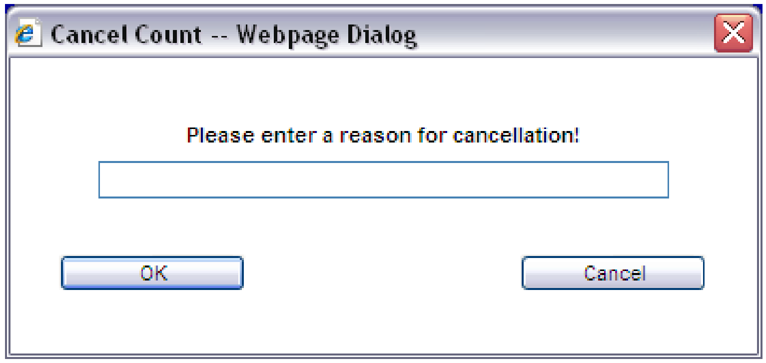
A Count must first be cancelled before a new count can be created that contains any of the Items included in the current Count.

To cancel a count:

1. From the Inventory Overview window, select the Count by clicking on the line that contains the count.



2. Click Cancel from the Top Menu Bar; the Cancel Count window will be displayed:



3. In the provided field, enter the reason you want to cancel the selected Count and click OK.

The Inventory Overview window will be displayed without the Count that was just cancelled.

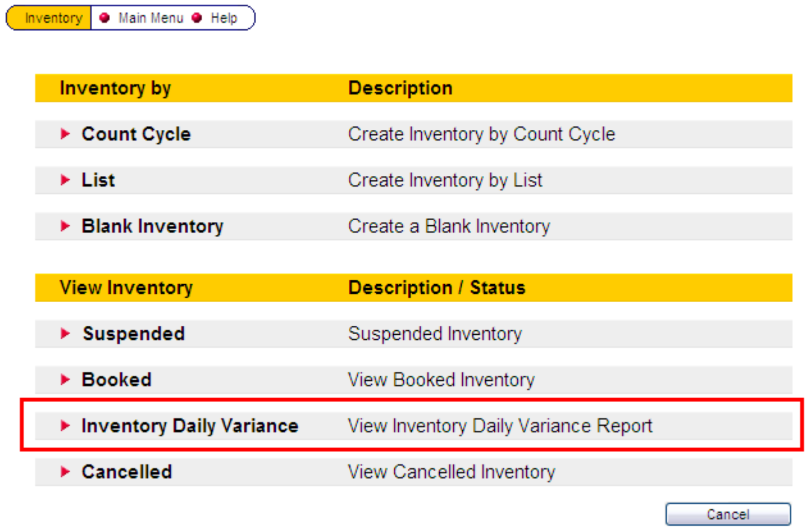
You can see the cancelled Counts by choosing the Cancelled Counts menu option in the Inventory Overview window.

Inventory Daily Variance Report

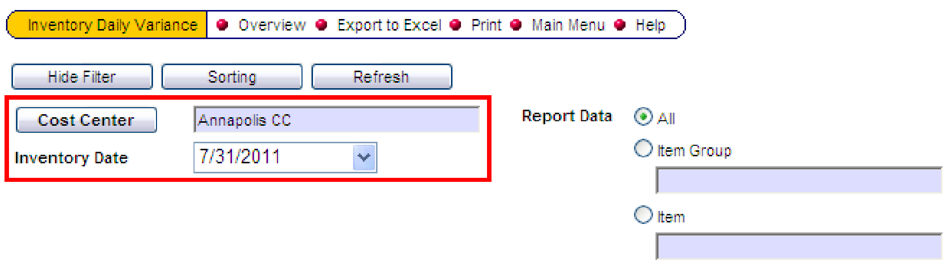
For organizations that do spot checks on Items throughout the day, the Inventory Daily Variance Report is a very useful tool. This report allows you to view Inventory Variances during the day, as opposed to only at the End of Day. It also displays the User responsible for booking the Inventory Count, for accountability purposes.

To view an Inventory Daily Variance Report:

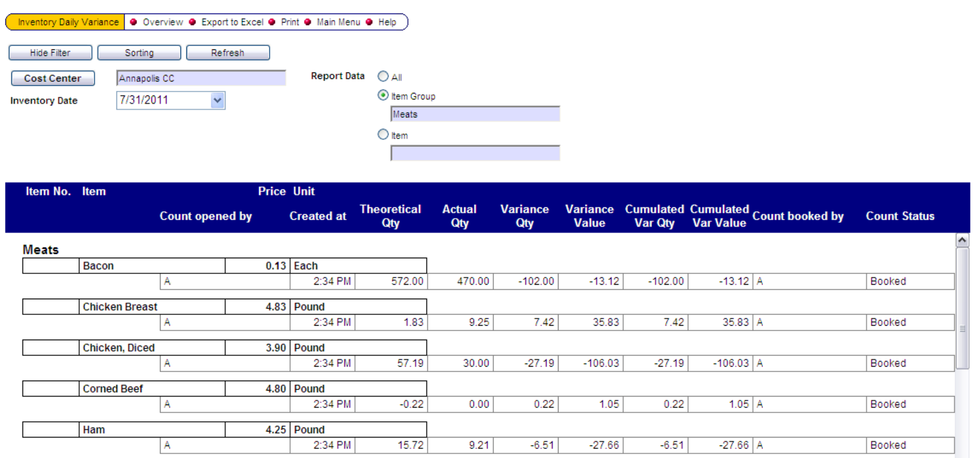
1. Select Inventory Daily Variance from the Inventory Overview window:



2. The Inventory Daily Variance window will be displayed. Select a Cost Center and an Inventory date to view and click Refresh. An Item Group or Item may be indicated to further narrow the search:



3. The Report will be displayed in the window:



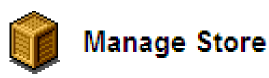
Manage Store

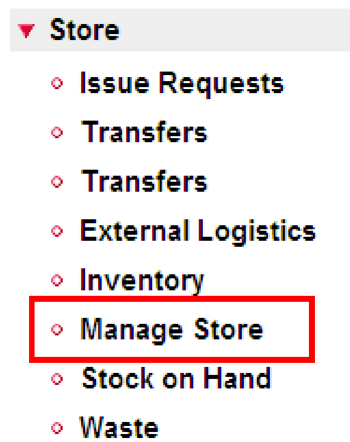
Manage Store Introduction and Overview

If you have administrative privileges in the myinventory system, your myinventory Main Menu may contain the Manage Store module. Tasks include all tasks in Stock on Hand – Standard SOH is for viewing without change capabilities.

Access the myinventory Manage Store Module

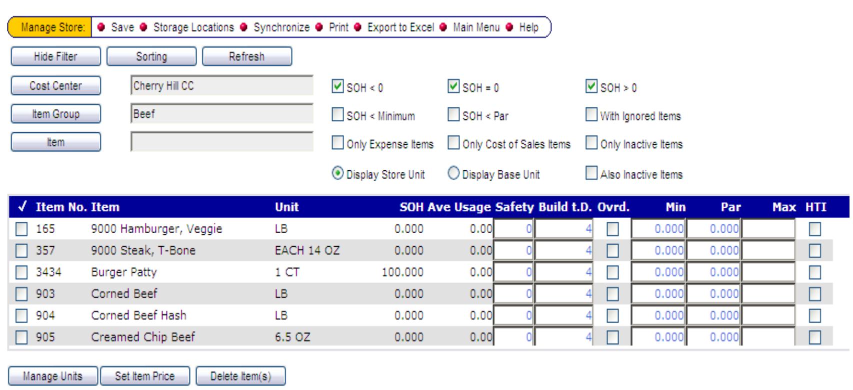
Click the Manage Store icon from the Main Menu or select Manage Store under Store:



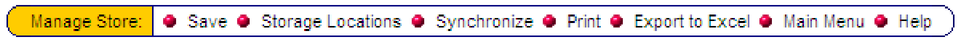


Manage Store Overview Window

The Manage Store Overview window is the first window displayed. If there are no entries in the window, select a Cost Center or an Item and click the Refresh button. The default is to not show any Items and allow the User to select filters, which saves page loading time.



The Top Menu Bar



Menu Item	Description
Overview	Go to the subject area overview.
Save	Saves any changes that were made to the Items.
Storage Locations	Allows you to make adjustments to the locations where Items are stored. This will aid in the physical counting of Items when printing count sheets and having Items placed in their proper location.
Synchronize	Allows you to synchronize the Store Units from the currently displayed Cost Center to another Cost Center
Print	Print the currently displayed information
Export to Excel	Exports the currently displayed information into an Excel spreadsheet
Main Menu	Return to the Main myinventory Menu.
Help	Launch the Help file.

Additional Screen Elements

These filters behave as described in the Welcome section For more information, please refer to the Screen Layout section of the Welcome page

.

Screen Element	Description
Manage Units	Use this to add new Units or delete an old Unit for a specific Item. Remember, you cannot delete the Base Unit. Store Units may be changed per Cost Center, if necessary. Adding Units to an Item may help when entering Inventory counts, since some Items are stored using many different types of packaging ‘Units’ (cases, boxes, bags, buckets, etc).
Set Item Price	Use this to make adjustments to the prices of Items. These changes will appear in Inventory. If an Item is shown in its Base Unit, then the price change will be in respect to the Base Unit. If an Item is shown in its Store Unit, then the price change will be in respect to the Store Unit. This option should be used as a last resort to adjusting an Item price. Prices should be corrected in the document in which they were booked wrong.

Information Bar

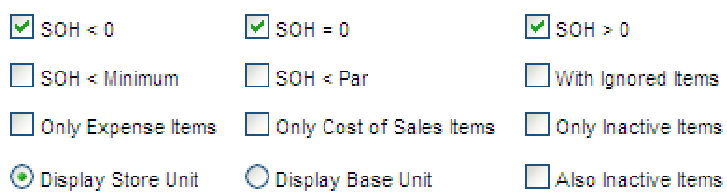
Menu Item	Description
Item No.	Displays the Item number for this Item
Item	Displays the Item name
Unit	Displays the Unit of Measure for this Item.
SOH	Displays the current Stock on Hand for this Item
Ave Usage	Displays the average usage for this Item, based on Sales Depletion, Waste and Inventory Counts
Safety	Allows a Safety factor to be set per Cost Center for the Item
Build t.D.	Not used by myinventory
Ovrd.	This option will be set automatically if the Safety factor is overridden for this Item. It allows you to see what Items follow the values set by Item/ Item Group and which follow the values set by Cost Center.

Menu Item	Description
Min	Displays the minimum amount of this Item before reorder. This is only used with Order Calculations
Par	Displays the Par level for this Item. This is only used with Order Calculations.
Max	Enter the maximum amount of the Item that may be Ordered at a time
HTI	High Ticket Item. Here you can define the most important Items. A report is available in mymicros.net that will display only these Items.

Use Filters to Change Manage Store Overview Window

Please refer to the Filters section of this document.

Additional Filters



There are additional filters which you may use to refine your search results. The following table describes these in detail:

Filter	Description
SOH < 0	Stock on Hand is less than Zero You can show stock as less than zero if you have not yet entered a received shipment, but have sold Items in that shipment. Use this filter to see stock Items where this has occurred. For example, you were out of hamburgers (SOH=0) so you ordered more. The shipment arrived, but you were busy at that time and were not able to enter a receipt. You went through lunch and sold 10 hamburgers. Now before you add the receipt for the hamburgers the SOH is actually -10. So in that case, if you used the **SOH < 0** filter, hamburgers would show up in the results
SOH = 0	Stock on Hand equals Zero Use this filter to see stock on hand for Item you are completely out of
SOH > 0	Stock on Hand is greater than Zero Use this filter to show any Items you have in stock
SOH < Minimum	Stock on Hand is less than Minimum Use this filter to see all Items where the stock on hand is less than the minimum amount. The minimum is an amount set by the system administrator on a per-Item basis that represents the minimum amount a location or Cost Center should have on hand. Consider it a minimum threshold
SOH < Par	Stock on Hand is less than Par Use this filter to see all Items where the count is less than the par amount. Par is an amount, usually the average amount on hand, set by the system administrator. This is generally a threshold at which you usually need to replenish your stock
With Ignored Items	Include Ignored Items (Items not included in Inventory Counts)
Only Expense Items	Show only Expense Items
Only Cost of Sales Items	Show only Cost of Sales Items

Filter	Description
Only Inactive Items	Show only Inactive Items
Display Store Unit Display Base Unit	The Store Unit is how the Unit is ordered from the Vendor in the smallest variation. If you ordered in the Unit “Case 4 Bags 5lbs.”, the Store Unit is “Bag 5 lbs.” The Base Unit would then be lbs. (pound)
Also Inactive Items	Include Inactive Items in the result set

Manage Units of Measure for Inventory Items

You can use the Manage Store module to change the Units of measure for any of the Items in your inventory. You can add or remove Units of measure from the available Units used for counts.

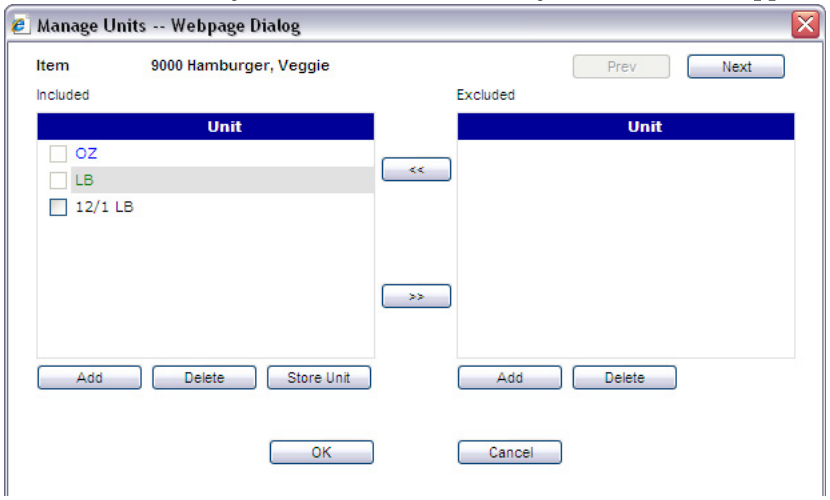
Change the Unit of Measure for an Item

To change the Unit of measure:

1. Change the filters so the Item you want to change appears in the Item list in the Manage Store Overview window
2. Select the Item you want to change the Unit of Measure for by clicking the Item in the Item list. In this example, “9000 Hamburger, Veggie” has been selected.

✓	Item No.	Item	Unit	SOH	Ave Usag
☑	165	9000 Hamburger, Veggie	LB	0.000	0.0
☐	357	9000 Steak, T-Bone	EACH 14 OZ	0.000	0.0
☐	3434	Burger Patty	1 CT	100.000	0.0

3. Click the Manage Units button; the Manage Units window appears:



In this example, you can see that there are Units of measure already in the Included list on the left side of the window.

Tips & Tricks

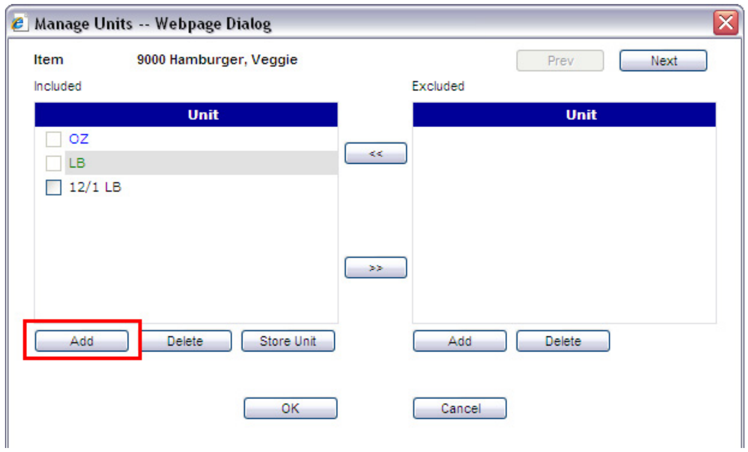
MICROS recommends setting up each Item with a Store Unit if no global Store Unit is assigned at the Item Group level.

4. From this window, you can add or remove Units of measure for the selected Item by selecting the check box and using the arrow between the Included and Excluded lists.
5. When you have completed the Unit management for Inventory Counts, click OK.

Add and Remove Items from the Included Units List

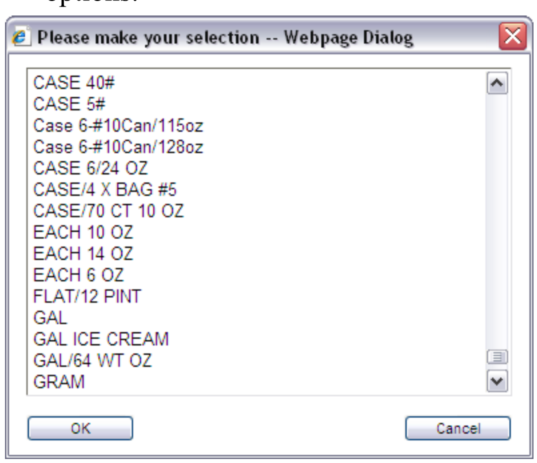
To add Units of Measure to the Included list:

1. From the Manage Units window, click Add below the Included Items area.



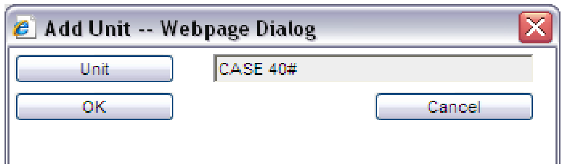
2. The Add Unit window will be displayed.

3. Place the cursor in the Unit field and press Enter to see the available Unit options:

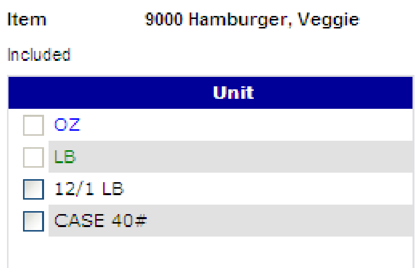


4. Select the Unit to add for Veggie Burgers. In this case, we will add the Case 40#. These Units will appear in Inventory Counts.
5. Select the Unit and Click OK.

6. The Add Unit window is refreshed with the Unit you have selected populated in the Unit field. In this example, it is populated with Case 40#:



7. Click OK; the Manage Units window is displayed with the Unit you have added in the Included Items area.



To remove Units from the Included list:

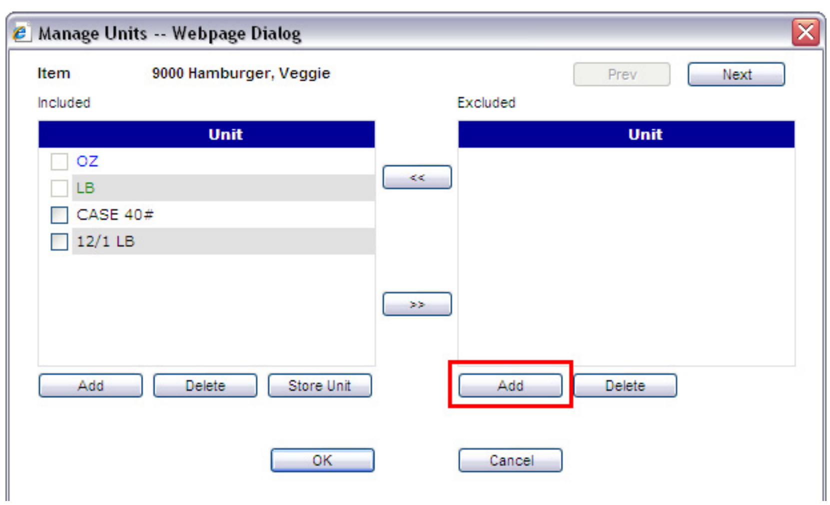
1. Select the Item by clicking in the box to the left of the Item
2. Click Delete. The Unit is removed from the Included list.

If you are finished adding or removing Units from the Included Units list, click OK.

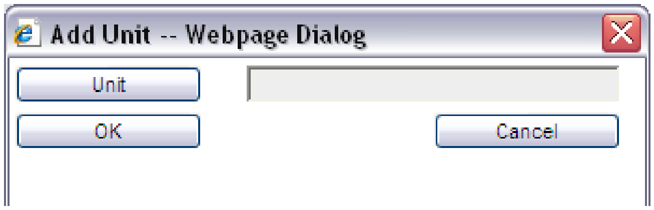
Add and Remove Items from the Excluded Units List

To add Units to the Excluded list:

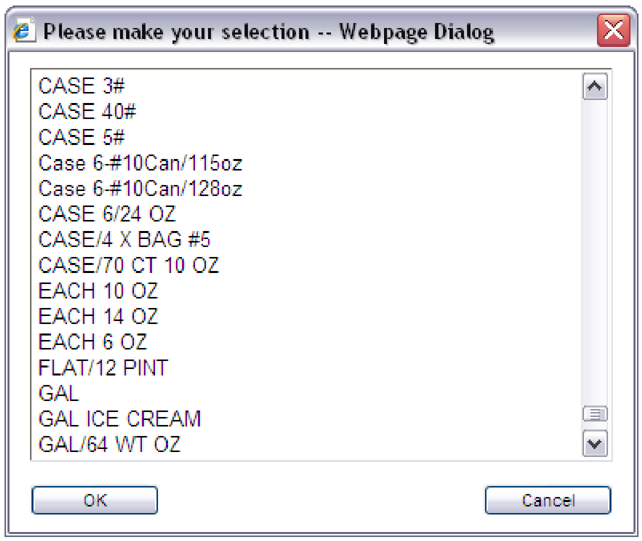
1. From the Manage Units window, click the Add button below the Excluded Items area.



The Add Unit window will be displayed:



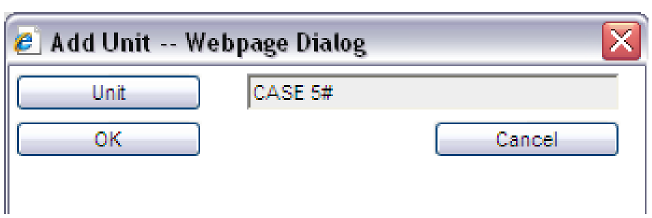
2. Place the cursor in the Unit field, and press Enter to see the available Unit options.



Now you can select the Unit to exclude for Veggie Burgers. In this case, we will exclude the Case 5#.

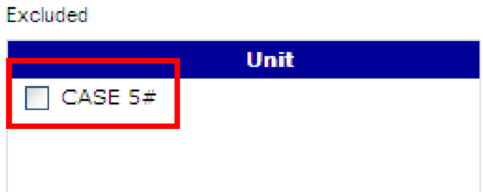
3. Select the Unit and Click OK.

The Add Unit window refreshes with the Unit you have selected populated in the Unit field:



4. Click OK.

The Manage Units window is displayed with the Unit you have added in the Excluded Items area.



To remove Units from the Excluded list:

1. Select the Item by clicking in the box to the left of the Item
2. Click the Delete button. The Unit is removed from the Excluded list.

If you are finished adding or removing Units from the Excluded Units list, click OK.

Select a Unit as the Default Store Unit

Using the Manage Store module, you can change the default Store Unit for selected Items.

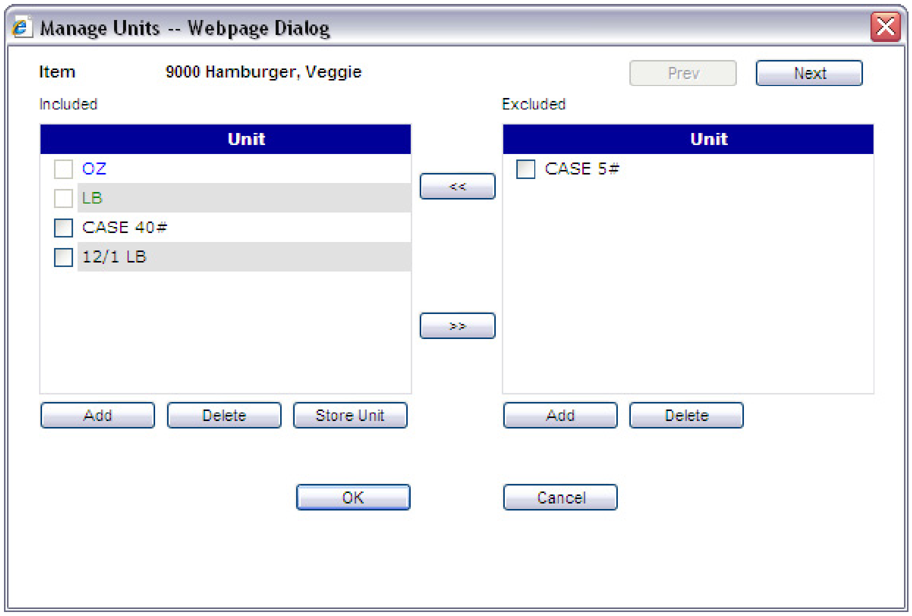
Tips & Tricks

MICROS recommend setting up each Item with a Store Unit if no global Store Unit is assigned at the Item Group level.

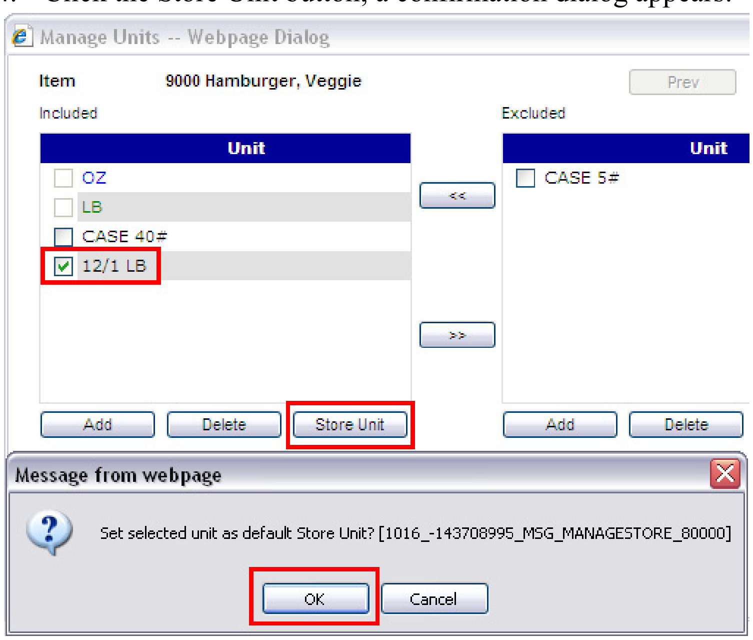
All reporting and modules will use Base Units whenever a Store Unit is not available.

1. From the Manage Store Overview window, select the Item you want to change the Default Store Unit for.

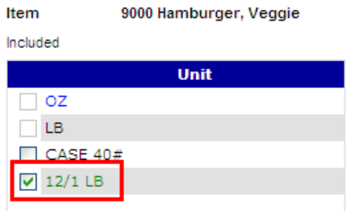
2. Click the Manage Units Button; the Manage Units window will be displayed.



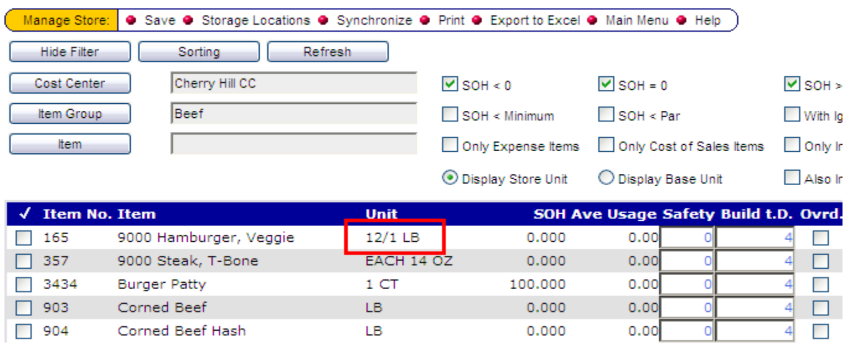
3. From the List of Included Units, select the Unit that you want to make the default Unit for this Item by clicking in the box to the left of the Item. The current Default Item is in green font.
4. Click the Store Unit button; a confirmation dialog appears:



5. Click OK; the Manage Units Window will refresh with the new default Unit



6. Click OK; the Manage Store Overview window will be displayed. To see the Default Unit changed for the selected Item, click the Refresh button.



The Manage Store Overview window will refresh and the Default Unit for the Item you changed appears with the new Unit.

Set Item Prices

You can change the price for an Item through the Manage Store module.

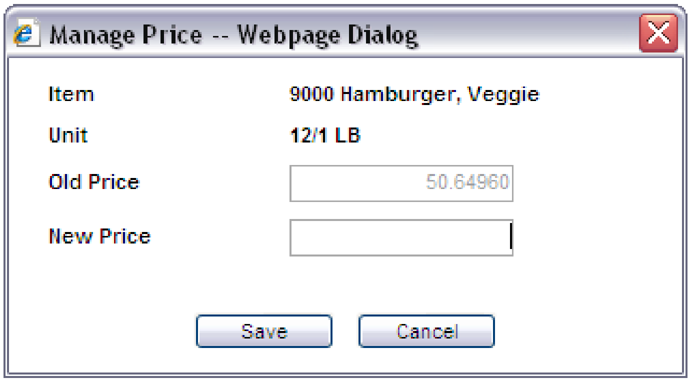
The changes made here will appear when Ordering and Receiving the Item. At this point, all prices are shown in Base Unit. Therefore, if the Base Unit is each, and the price shown is $1.00, and the Item is received in “Case 24 each” and the case price increases to $24.48, the Base Unit price would then need to be set to $1.02. This section may require some calculation on the part of the User to come up with the Base Unit price when the case prices change for an Item.

Tips & Tricks

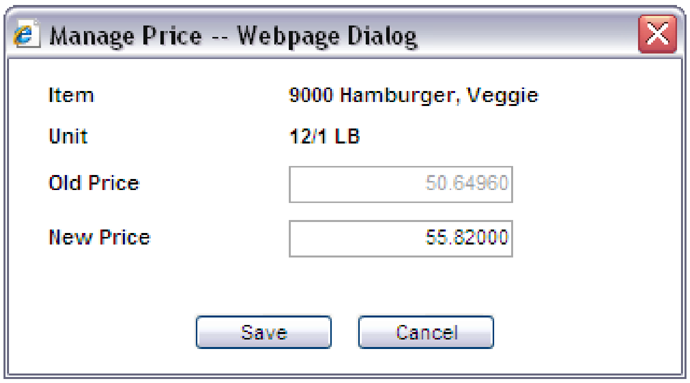
This affects the price/value of inventory and should never be changed unless fixed/standard costing is being used for inventory.

1. From the Manage Store Main Overview window, select the Item.

2. Click the Set Item Price button; the Manage Price window appears:



3. In the New Price field, enter the new price.



4. Click Save

Manage Storage Locations

Storage Locations are a means of organizing your inventory on the actual shelves, in the various storage areas of your Cost Center(s). By organizing your inventory, you will be able to quickly take stock of your inventory to determine what needs to be ordered, without having to search your entire storage area for an Item. This can help in reducing loss, since Items will not be placed in random, unorganized places where they can be overlooked and over ordered. Using carefully named locations and determining where exactly on the shelves Items will be kept is a key element in keeping good inventory.

There are two different styles of Storage Locations in the myinventory application. There is the Standard style, which has 9 Storage Locations and Items can be in any or all of those locations. There is also Advanced Storage Locations, which has unlimited Storage Locations and is more precise in the placement of the Items on the shelves in that Cost Center. You have the choice of which type of Storage Location format you would like to implement. For most organizations, Standard Storage Locations will more than suffice. For commissaries, warehouses, or other large Cost Centers that might contain multiple revenue centers, it may be advisable to use Advanced Storage Locations

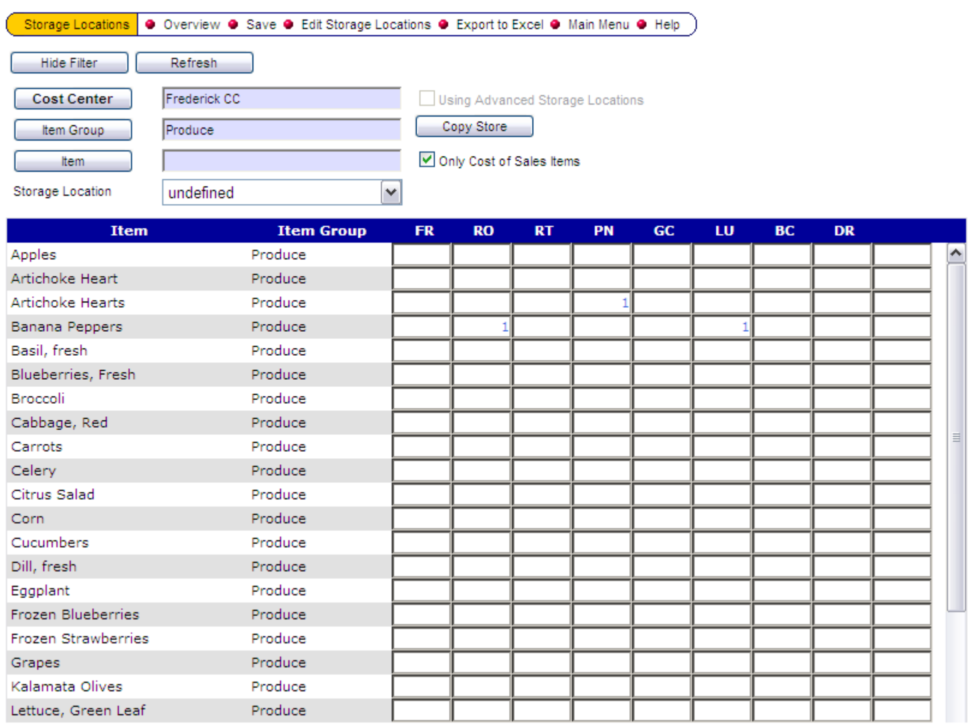
Standard Storage Locations

Standard Storage Locations will provide most organizations with more than enough room for their entire inventory. Standard Storage Locations allow for up to 9 areas for all Cost Center inventory to be defined.

Tips & Tricks

Standard Storage Locations are much easier to set up and maintain. If a site has 9 or less Storage Locations, this should always be the practice.

Click Storage Locations in the Top Menu Bar from the Manage Store Overview window; the Standard Storage Location window will be displayed:



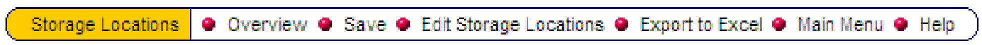
If there is no information is on screen, use the filters and select Refresh.

There are a total of nine Storage Locations and Items can be in any or all of those locations. Common Storage Locations include: Walk-In Cooler (WIC), Walk-In Freezer (WIF), Cooks Line (CL), Dry Storage (DS), Liquor Storage (LS), Bar (BAR), etc. These are just examples, however, as every organization is different. Storage Locations can be edited as necessary.

Manage Standard Storage Locations Detail Window

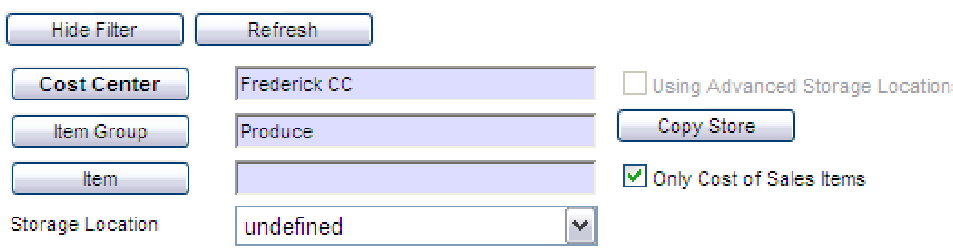
From the Storage Locations window, you can manage your Storage Locations for all Items or Items in a selected Item Group. The following describes some of the common features in the Manage Storage Locations Detail window.

Top Menu Bar

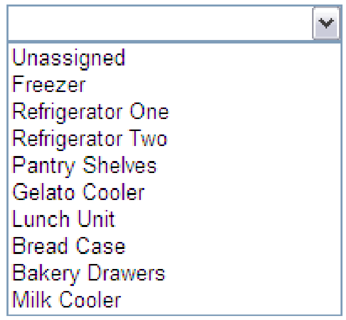


Menu Item	Description
Overview	Go to the subject area overview
Save	Saves any changes you have made to the Storage Location information
Edit Storage Location	Opens a window in which you can modify Storage Location names
Export to Excel	Exports the currently displayed information into an Excel Spreadsheet
Main Menu	Return to the Main myinventory Menu
Help	Launch the Help file

Additional Screen Elements



These filters behave as described in the Welcome section. For more information, please refer to the Screen Layout section of the Welcome page.

Menu Item	Description
Storage Location	Use this filter to see Items for a specific Storage Location. 
Copy Store	Use this to copy the Storage Locations for the current Cost Center to the selected Cost Center. This will open the Copy Store pop-up box
Only Cost of Sales Items	Enable this to only view Items that are identified as Cost of Sales Items

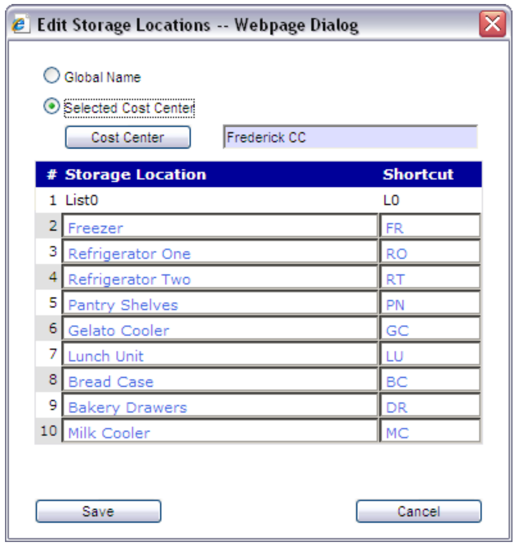
Information Bar

Menu Item	Description
Item	The Item name
Item Group	The Group that the selected Item belongs to
FR, RO, RT, PN, GC, LU, BC, DR, MC	The Storage Locations abbreviations; these fields can be modified as necessary to suit the organization's own Storage Locations

Edit Storage Locations

To edit Storage Locations:

1. Click Edit Storage Locations from the Top Menu Bar; the following window will be displayed:



Note *You will see 10 Storage Locations listed. The first Storage Location is List0 because it is a Storage Location for every Item. It is not a Storage Location that can be modified except for its name and shortcut. The only Storage Locations you can put Items in are Storage Locations 2 – 10.*

2. Determine if this edit is a global name change (affecting the entire organization) or if it is only for the selected Cost Center
3. Click in the Storage Location field and enter a new Storage Location
4. Click inside the corresponding Shortcut field and enter a new shortcut (abbreviation)
5. Click Save

The Manage Storage Locations Overview window will display your updates

Sorting

Not only can Items be places in a particular Storage Location, but they can also be sorted in those Locations.

In a dry storage area, there may be one shelf completely designated as the Pasta Shelf. On this shelf is spaghetti, elbow macaroni, fettuccine, and penne noodles. On the next shelf below the Pasta is the Bread Shelf. On the Bread Shelf, the Cost Center stores pumpernickel, rye, white, wheat, sourdough, and Kaiser rolls. The organization wants to ensure that all of the pastas stay on the Pasta Shelf and all of the breads stay on the Bread Shelf. The organization assigns the Pasta Shelf with the number of 1 and the Bread Shelf with a number of 2.

	Dry Storage	
Shelf 1	• Spaghetti • Elbow Macaroni	• Penne Noodles • Fettuccine
Shelf 2	• Pumpernickel • Rye • White	• Wheat • Sourdough • Kaiser Rolls

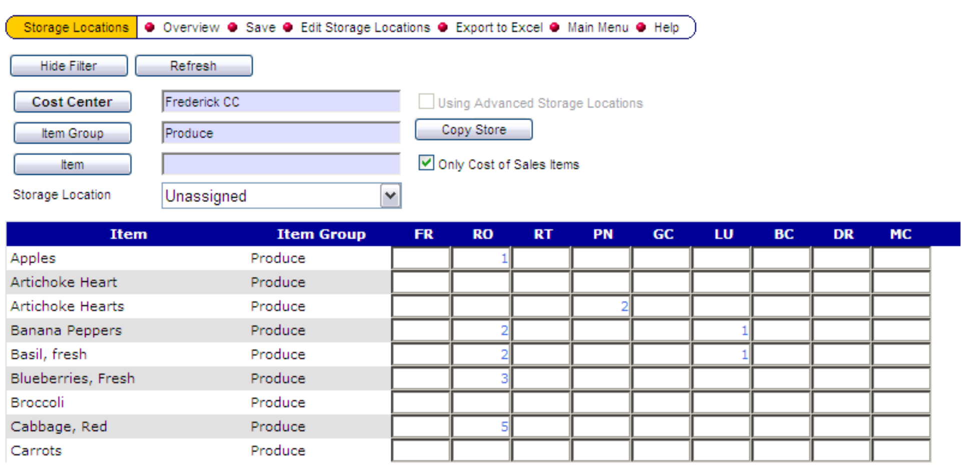
You can assign numbers and categorize the Items together. When the inventory count sheet is printed out, these Items will all be kept together and bundled by their identifying numbers.

You must enter a number in the Storage Location field to mark it as the location for the Item. If you choose not to use identifying numbers, your Items will list alphabetically. It is completely up to an organization and Cost Center's discretion as to whether or not to group Items by a number.

Assign Standard Storage Locations

To assign a Storage Location to an Item group:

1. Use filters to locate the Item Group:



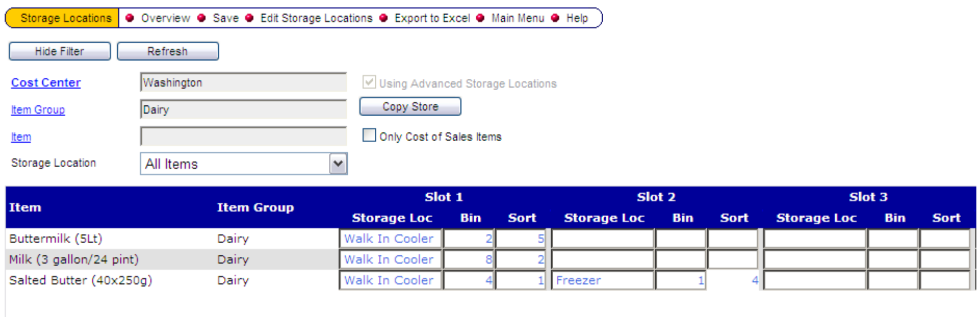
2. Enter a number in the location where the Items will be kept
3. Click Save from the Top Menu Bar

Advanced Storage Locations

Advanced Storage Locations are ideal for warehouses, commissaries, food courts and other organizations that may have multiple revenue centers or perhaps just a very large inventory that needs to be kept organized in a very clear and accurate manner. Advanced Storage Locations provide an organization with the ability to create an unlimited amount of Storage Locations and each Item can exist in up to 9 locations at one time. Furthermore, each Item may be assigned a Bin and Sort number that will help employees locate the Item within the Storage Location.

Functionally, Advanced Storage Locations act similarly to Standard Storage Locations.

Click Storage Locations from the Top Menu Bar in the Manage Store Overview window; the Storage Locations window will be displayed:



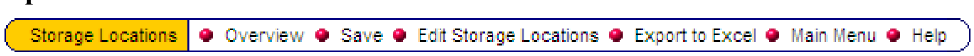
If no information is on the screen, use the filters and click the Refresh button.

Each Item may exist in up to nine locations. These locations are called “slots”.

Manage Advanced Storage Locations Detail Window

From the Storage Locations window, you can manage your Storage Locations for all Items or Item Groups. The following describes some of the common features in the Manage Advanced Storage Locations Detail window.

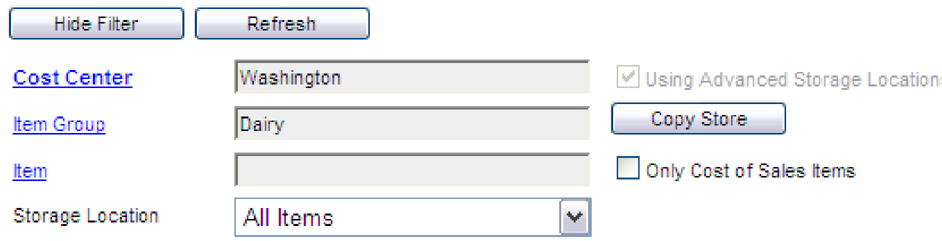
Top Menu Bar



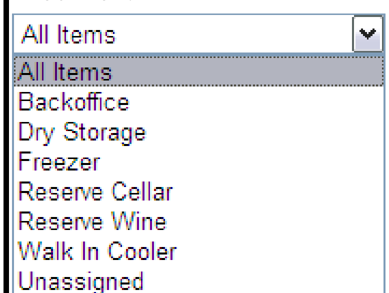
Menu Item	Description
Overview	Go to the subject area overview.
Save	Saves any changes you have made to the Storage Location information
Edit Storage Location	Opens a window in which you can create/edit/ delete Storage Locations.
Export to Excel	Exports the currently displayed information into an Excel spreadsheet

Menu Item	Description
Main Menu	Return to the Main myinventory Menu.
Help	Launch the Help file.

Additional Screen Elements



These filters behave as described in the Welcome section. For more information, please refer to the Screen Layout section of the Welcome page.

Menu Item	Description
Storage Location	Use this filter to see Items for a specific Storage Location: 
Copy Store	Select this to copy the Storage Locations for the current Cost Center to the selected Cost Center.
Only Cost of Sales Items	Enable this to only view Items that are identified as Cost of Sales Items

Information Bar

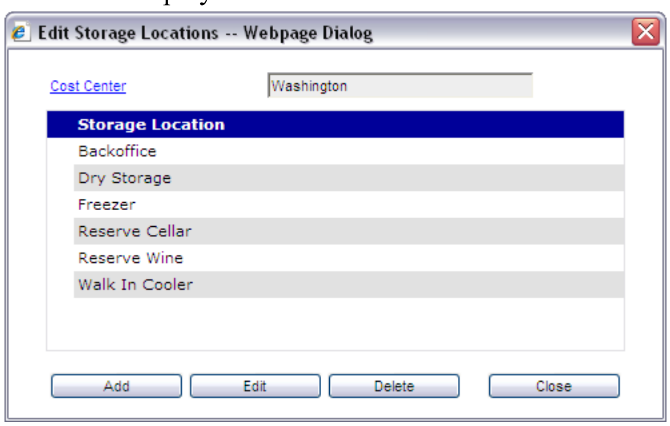
Menu Item	Description
Item	The Item name
Item Group	The Group that the selected Item belongs to
Slot 1 – 9	The nine Storage Locations that the Item can be associated with

Menu Item	Description
Storage Loc	Storage Locations are where the Items are physically kept in the Cost Center, such as walk-in, bar, dry storage, etc. For example, bottled beer may be kept at the bar for sale to bar customers, at the service bar for table service sales, and in the bar cooler for stocking. These fields may be modified by clicking in the field and selecting the appropriate Storage Location from the drop-down list.These locations are determined and created by the Sys Admin.
Bin	This is where in the Sort the Item is located
Sort	This is where the Item is located on the shelves

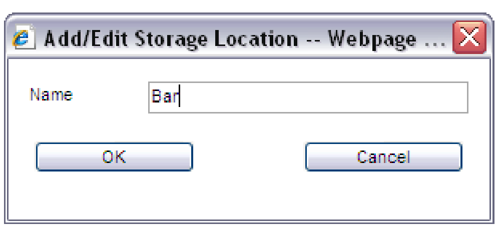
Edit Advanced Storage Locations

To add Storage Locations:

1. Click Edit Storage Locations from the Top Menu Bar; the following window will be displayed:



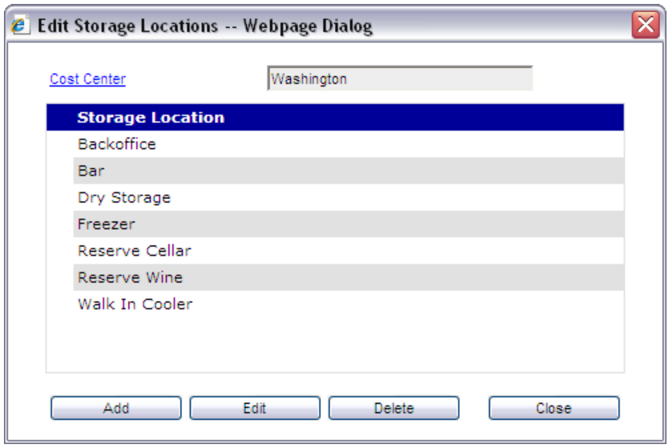
2. Click the Add button
3. Enter the name of the Storage Location and click OK



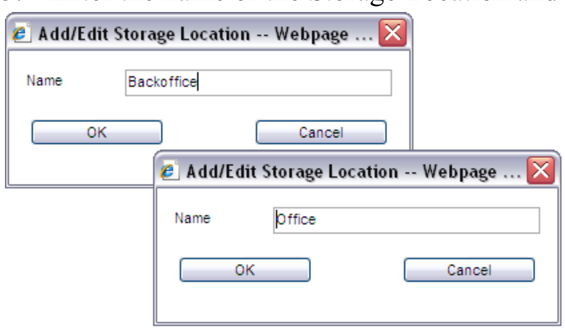
The new Storage Location will be reflected in the Edit Storage Locations window

To edit an existing Storage Location:

1. Click Edit Storage Locations from the Top Menu Bar; the following window will be displayed:



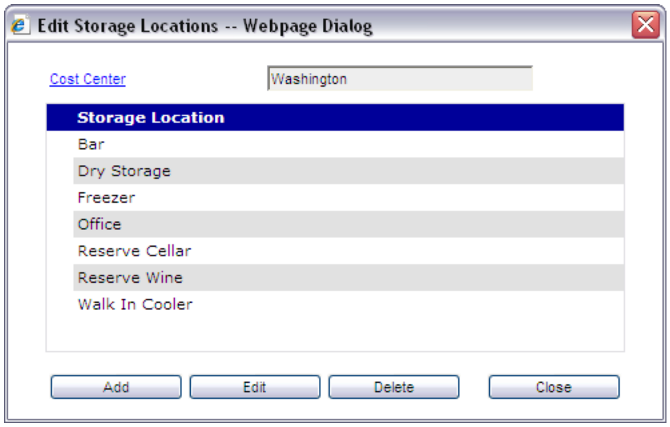
2. Select a Storage Location to edit and click the Edit button
3. Enter the name of the Storage Location and click OK



The edited Storage Location will be reflected on the Edit Storage Locations Page

To delete a Storage Location:

1. Click Edit Storage Locations from the Top Menu Bar; the following window will be displayed:



2. Select a Storage Location to delete and click the Delete button
3. Click OK in the confirmation dialog box

The deleted Storage Location will no longer be on the Edit Storage Locations Page.

Sort and Bin

The Sort and Bin concepts are similar to sorting in Standard Storage Location. It determines where in the Storage Location the Items will be kept, as well as where on the shelf the Items are located. For example, we would like to sort our vodkas and rums. We decide that our vodkas will be in one column (or sort) and our rums will be in another column (or sort) and that all liquors will be organized by top shelf, premium, and flavored liquors. Then, we assign numbers to Items based on their placement in the sort and bin.

	Vodka (Sort 1)	Rum (Sort 2)
Bin 1	Top Shelf: • Belvedere • Finlandia • Grey Goose	Top Shelf: • Flor de Cana • Bacardi 151 • Mt. Gay Rum Sugar Cane

	Vodka (Sort 1)	Rum (Sort 2)
Bin 2	Premium: • Absolut • Ketel One • Smirnoff	Premium: • Captain Morgan's Spiced • Bacardi • Mt. Gay Rum Eclipse
Bin 3	Flavored: • Absolut Citron • Smirnoff Vanilla Twist • Stolichnaya Blueberry	Flavored: • Captain Morgan's Parrot Bay • Bacardi O (Orange) • Cruzan Mango Rum

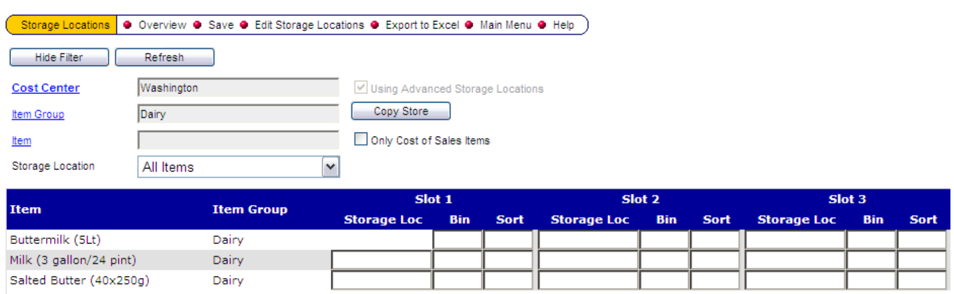
In the above example, Grey Goose would be identified by Sort 1 Bin 1. Captain Morgan's Spiced Rum is Sort 2 Bin 2. Smirnoff Vanilla Twist is Sort 1 Bin 3. Now, when doing inventory, employees will know exactly where to go and where to look to find the Items.

These numbers categorize the Items together. When the inventory count sheet is printed out, all of the vodkas will print out together in alphabetical order. All of the rums will print out next and will also be alphabetized.

Use of these numbers to organize your Items is completely optional. If you choose not to use identifying numbers, then your Items will list alphabetically. It is completely up to an organization and Cost Center's discretion as to whether or not to group Items by a number.

Assign Advanced Storage Locations

1. Use filters to locate Items to be assigned to Advanced Storage Locations:



Tips & Tricks

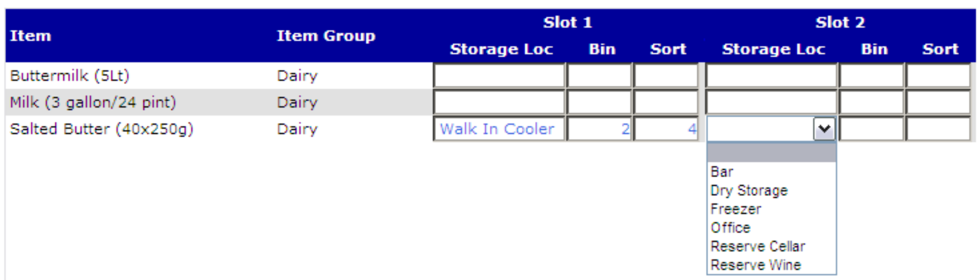
Leave room in between slot numbers. If you use every number (1-10) and then you get a new Item that should be #3, you will need to change all of the numbers 2 and up. Instead, MICROS recommends creating slot numbers with "spaces" – ex. 10, 20, 30, 40, etc. Then, when a new Item needs to be added, it can be designated #15 or #22.

2. Select the Storage Location for Salted Butter by clicking in the Storage Loc field and enabling the drop-down list

3. Enter the sort value for Butter in the Sort field and the bin value in the Bin field

   Butter is also kept in the Freezer.

4. Select the Storage Loc field under Slot 2 and select the Item's Storage Location; enter the Sort value and Bin value



5. Click Save from the Top Menu Bar when all Storage Locations, Sorts, and Bins have been modified as necessary.

Stock on Hand

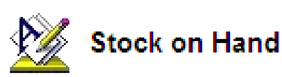
Introduction and Overview

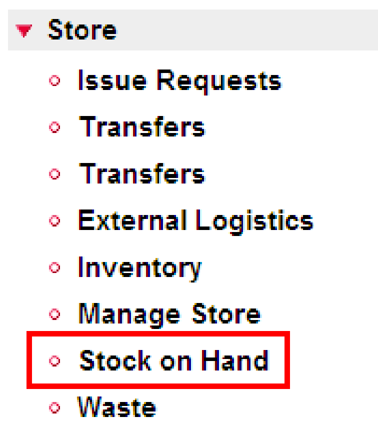
myinventory provides enterprise access to current Stock on Hand levels. Filtering tools allow you to view Items below ideal par levels, Items classified as “expense”, inactive Items, and negative balance Items (due to Recipe errors or missing delivery Receipts).

> **Tips & Tricks**
> *MICROS recommends setting up and creating “Store Units” for all Items. If there is no Store Unit for an Item, it will appear in its Base Unit in Stock on Hand. Creating Store Units will reduce calculation errors.*

Access the myinventory Stock on Hand Module

From the Main Menu, click the Stock on Hand icon or select the option under Store:

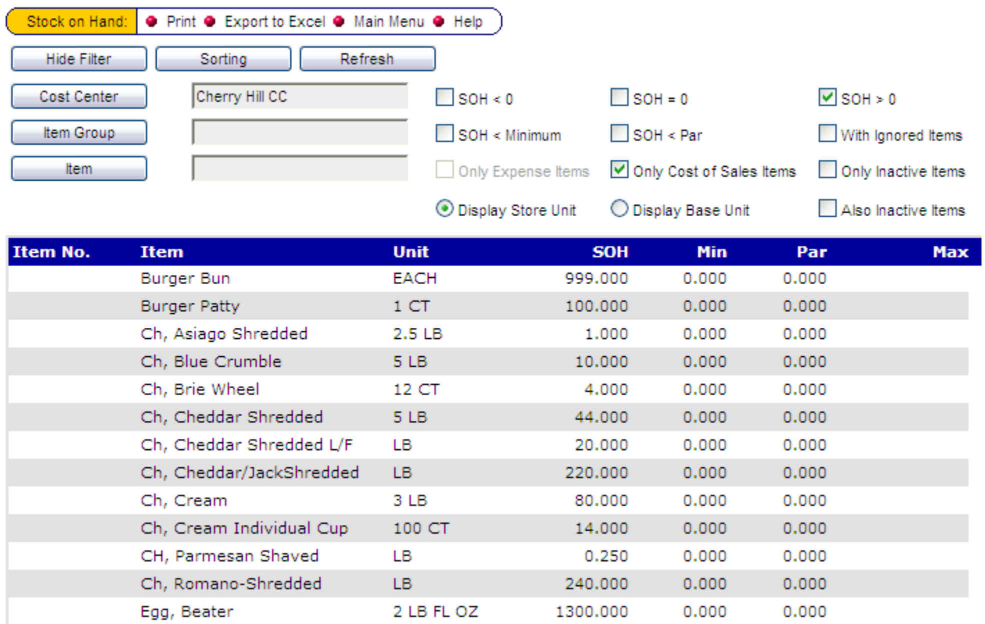




Stock on Hand Overview Window

The Stock on Hand Overview window is the first window you see.

If no Inventory Items appear in the list, but entries have been created, click Refresh to show the Inventory Items for the selected Cost Center. The Overview window appears without Items automatically so the User can select proper filters first to cut down on the page loading time.

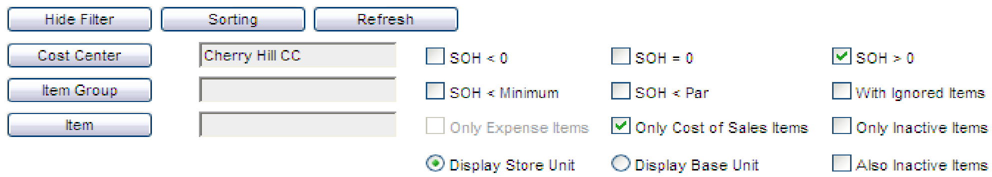


Item No.	Item	Unit	SOH	Min	Par	Max
	Burger Bun	EACH	999.000	0.000	0.000	
	Burger Patty	1 CT	100.000	0.000	0.000	
	Ch, Asiago Shredded	2.5 LB	1.000	0.000	0.000	
	Ch, Blue Crumble	5 LB	10.000	0.000	0.000	
	Ch, Brie Wheel	12 CT	4.000	0.000	0.000	
	Ch, Cheddar Shredded	5 LB	44.000	0.000	0.000	
	Ch, Cheddar Shredded L/F	LB	20.000	0.000	0.000	
	Ch, Cheddar/JackShredded	LB	220.000	0.000	0.000	
	Ch, Cream	3 LB	80.000	0.000	0.000	
	Ch, Cream Individual Cup	100 CT	14.000	0.000	0.000	
	CH, Parmesan Shaved	LB	0.250	0.000	0.000	
	Ch, Romano-Shredded	LB	240.000	0.000	0.000	
	Egg, Beater	2 LB FL OZ	1300.000	0.000	0.000	

Top Menu Bar

Menu Item	Description
Print	Print the currently displayed information
Export to Excel	Export the currently displayed information to an Excel spreadsheet
Main Menu	Return to the Main myinventory Menu.
Help	Launch the Help file.

Additional Screen Elements

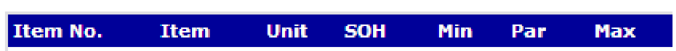


These filters behave as described in the Welcome section. For more information, please refer to the Screen Layout section of the Welcome page. However, the Stock on Hand module has special filters. These special filters are described in the table below.

Filter	Description
SOH < 0	Stock on Hand is less than Zero You can show stock as less than zero if you have not yet entered a received shipment, but have sold Items in that shipment. Use this filter to see stock Items where this has occurred. For example, you were out of hamburgers (SOH=0) so you ordered more, the shipment arrived, but you were busy at that time and were not able to enter a Receipt. You went through lunch and sold 10 hamburgers. Now, before you add the Receipt for the hamburgers, the SOH is actually -10. So in that case, if you used the SOH < 0 filter, hamburgers would show up in the results.
SOH = 0	Stock on Hand equals Zero Use this filter to see Stock on Hand for Items you are completely out of.
SOH > 0	Stock on Hand is greater than Zero Use this filter to show any Items you have in stock.
SOH < Minimum	Stock on Hand is less than Minimum Use this filter to see all Items where the Stock on Hand is less than the minimum amount. The minimum is an amount set by the system administrator on a per-Item basis that represents the minimum amount a location or Cost Center should have on hand. Consider it a minimum threshold.

Filter	Description
SOH < Par	Stock on Hand is less than Par Use this filter to see all Items where the count is less than the par amount. Par is an amount, usually the average amount on hand, set by the system administrator. This is generally a threshold at which you usually need to replenish your stock.
With Ignored Items	Include Ignored Items (Items not included in counts)
Only Expense Items	Show only Expense Items
Only Cost of Sales Items	Sow only Cost of Sales Items
Only Inactive Items	Show only Inactive Items
Display Store Unit Display Base Unit	The Store Unit is how the Unit is ordered from the Vendor in the smallest variation. If you ordered in the Unit “Case 4 Bags 5lbs.”, the Store Unit is “Bag 5 lbs.” The Base Unit would then be lbs. (pound). Store Unit can be set to any Unit greater than or equal to the Base Unit.
Also Inactive Items	Includes Inactive Items in the result set

Information Bar



Menu Item	Description
Item No.	Displays the Item number
Item	Displays the Item name
Unit	Displays the Unit of Measure for this Item. (Base or Store)
SOH	Displays the current Stock on Hand for this Item
Min	Displays the minimum level of this Item before reorder. This is only used with PAR Suggested Order Calculations
Par	Displays the Par level for this Item. This is only used with PAR Suggested Order Calculations.
Max	Displays the Max quantity set for this Item

Waste

Introduction and Overview

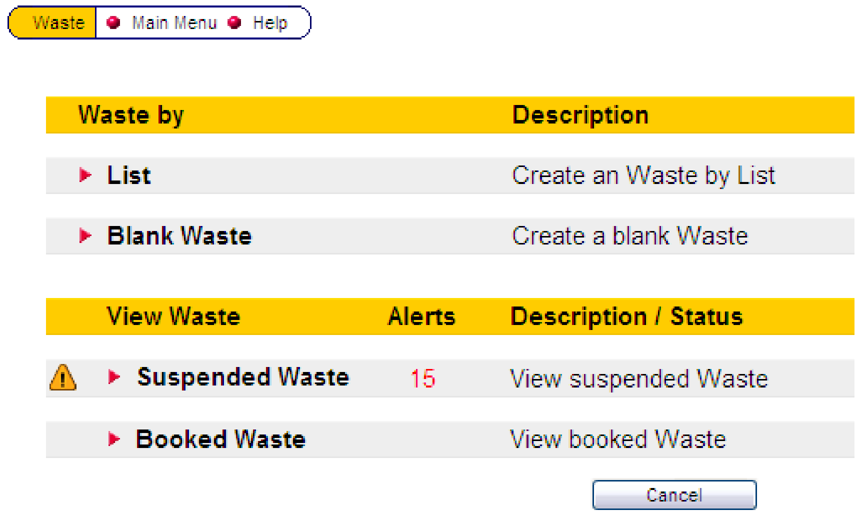
Wondering why actual usage doesn't match theoretical usage? Waste is a major contributing factor for these variances. The system provides the functionality to "waste" product as it is discovered. Individual Waste Groups can be established to meet your tracking needs (i.e. breakage, spoilage, expiration date …). Not only does this help identify problems with product, it can also help identify inefficient crew shifts.

Accessing the Waste Module

Click the Waste icon from the Main Menu or select Waste from under Store Level functions:

Waste Overview Window

The Waste Overview window is the first window you see after accessing the Waste module:



Create Waste

You can create Waste 2 ways:

1. By List
2. By Blank Waste

Tips & Tricks

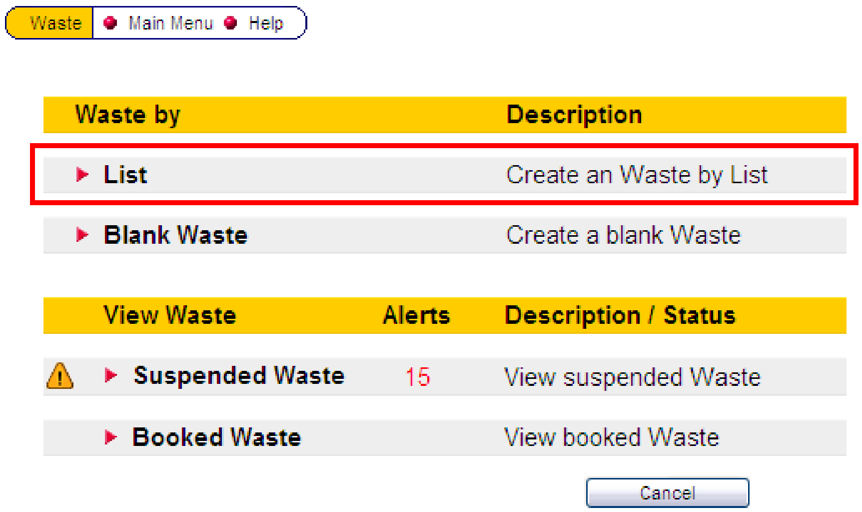
Determine (if possible) how Waste will be tracked and calculated on a company wide basis: shift, daily, weekly, etc.

Inform your employees so that they can keep accurate track of their Waste. This way everyone will know what type of Waste is outstanding.

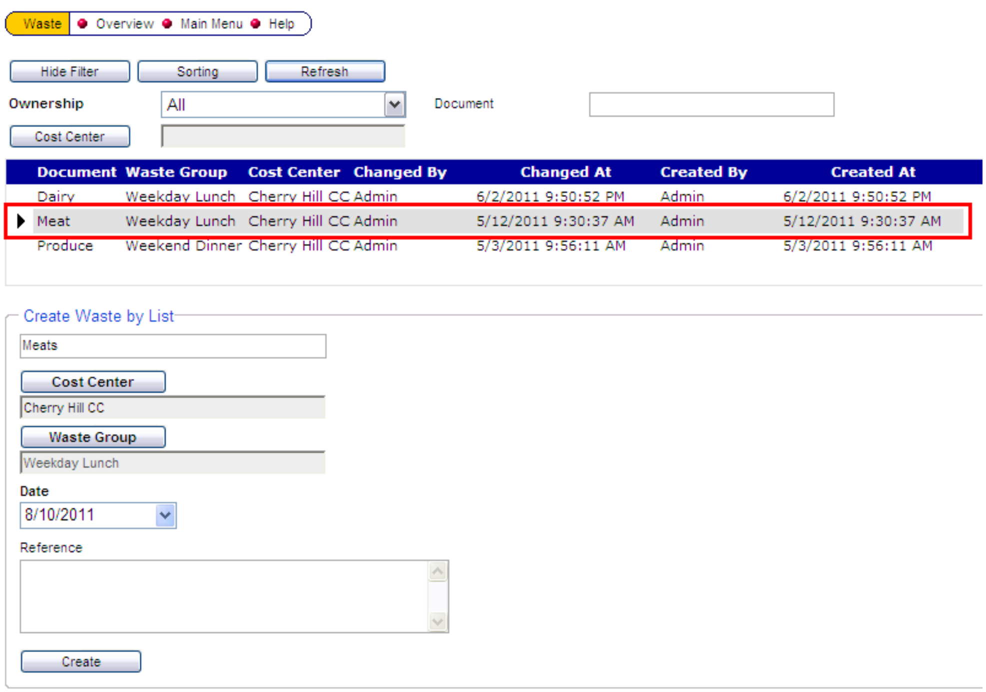
Count variances. For example, Waste is counted weekly and Item Group counts are daily. A count for Wednesday has a large variance in ground beef but, in Waste, there is 7 lbs of ground beef unbooked. Remember, Waste does not deplete from the inventory until it is booked!

Create Waste by List

1. Select List from the Waste Overview window:



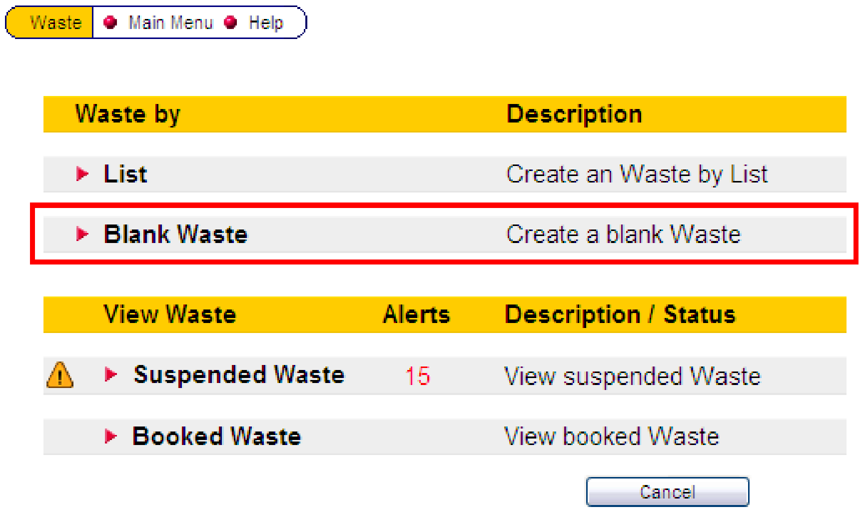
2. Select the Document, enter any pertinent information and click Create:



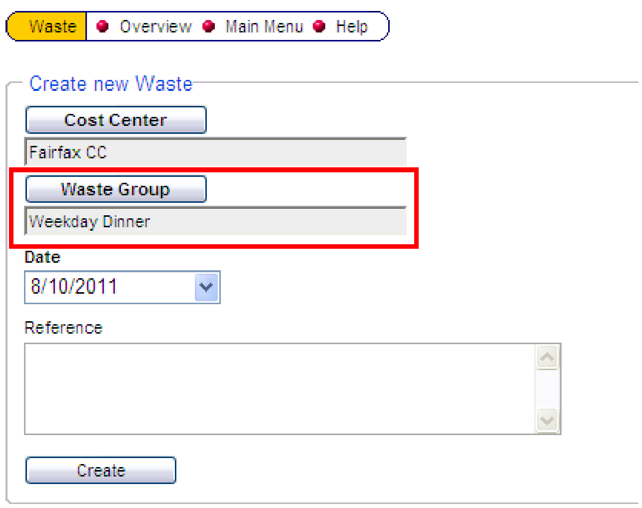
3. The Waste Detail window will be displayed

Create a Blank Waste

1. Select Blank Waste from the Waste Overview window:



2. Select a Waste Group and click Create:

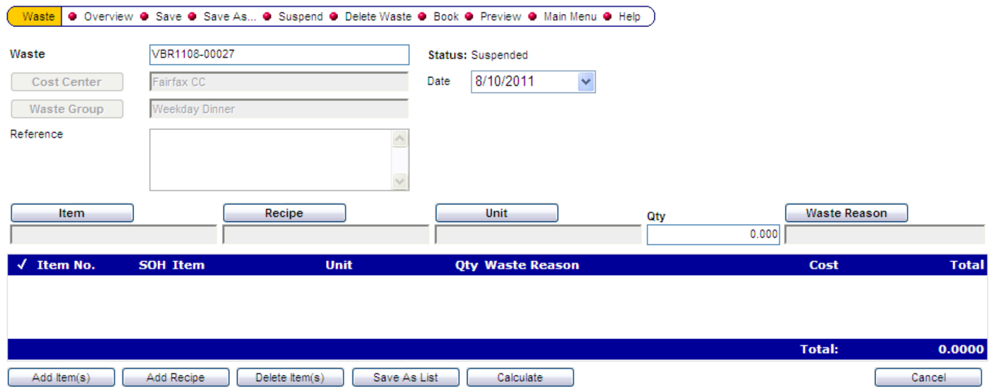


3. The Waste Detail window appears

Keep track of all Waste. If you tend to Waste a lot of one particular Item, you may want to consider prepping less for future use.

The Waste Detail Window

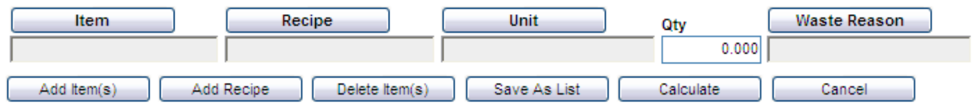
The following section describes the Waste Detail window:



Top Menu Bar

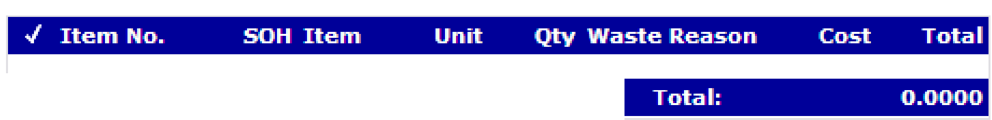
Menu Item	Description
Overview	Go to the subject area overview
Save	Saves the Waste document
Save As…	Allows you to suspend the Waste document, rename it, and continue working on the Waste under its new name
Suspend	This feature allows you to save the document and returns you to the Overview window where you can continue working on this suspended document at another time. Suspended documents are highlighted with the color green
Delete Waste	Deletes the current Waste document completely and returns you to the Overview window
Preview	Allows you to preview the information in print format to print the page, if necessary
Book	This will book your Waste document
Main Menu	Return to the Main myinventory Menu
Help	Launch the Help file

Additional Screen Elements



Screen Element	Description
Item	Search for an Item in this field for quick entry onto the Waste document
Recipe	Search for a Recipe in this field for quick entry onto the Waste document
Unit	Enter the Unit for the chosen Item for quick entry onto the Waste document
Qty	Enter the Qty of the Item or Recipe
Waste Reason	Select a Waste Reason for the Item or Recipe
Add Item(s)	Use this to add Items to the Waste document
Add Recipe	Use this to add Recipes to the Waste document
Delete Item(s)	To delete an Item, first select the Item(s) or Recipe(s) by checking the box to the left of the Item. Then click Delete to delete the Item(s) from the Waste document
Save As List	Use this to keep the Waste document you are working on for future use as a template or list. This list will show up on the Waste Overview window and will be highlighted with the color blue. You can use a list to create a Waste document that is pre-established or routine.
Calculate	Use this whenever you would like a Total for your Waste document to be display at the bottom of the Detail grid.
Cancel	Cancels the current Waste document

Information Bar



Menu Item	Description
Item No.	Displays the Item number
SOH Item	Displays the Item name

Menu Item	Description
Unit	Displays the Unit of Measure
Qty	Allows you to enter the quantity of the Item to be Wasted
Cost	Displays the cost of the Item per Unit
Total	Displays the total cost of the Item
Total	Displays the total cost of all Items

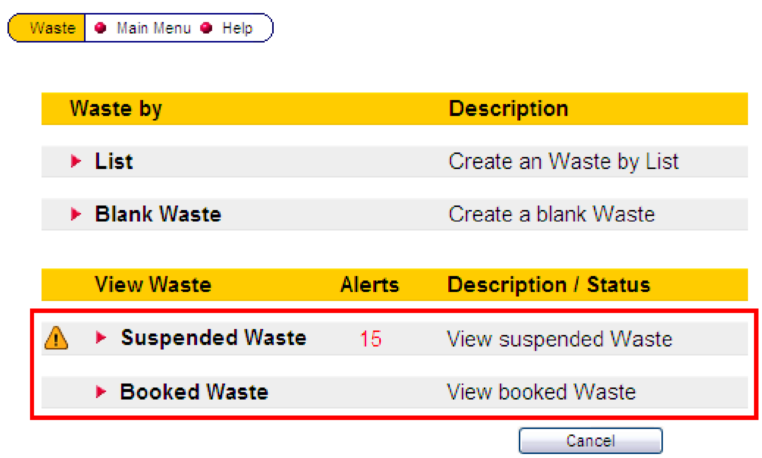
Viewing Waste

There are 2 types of Waste:

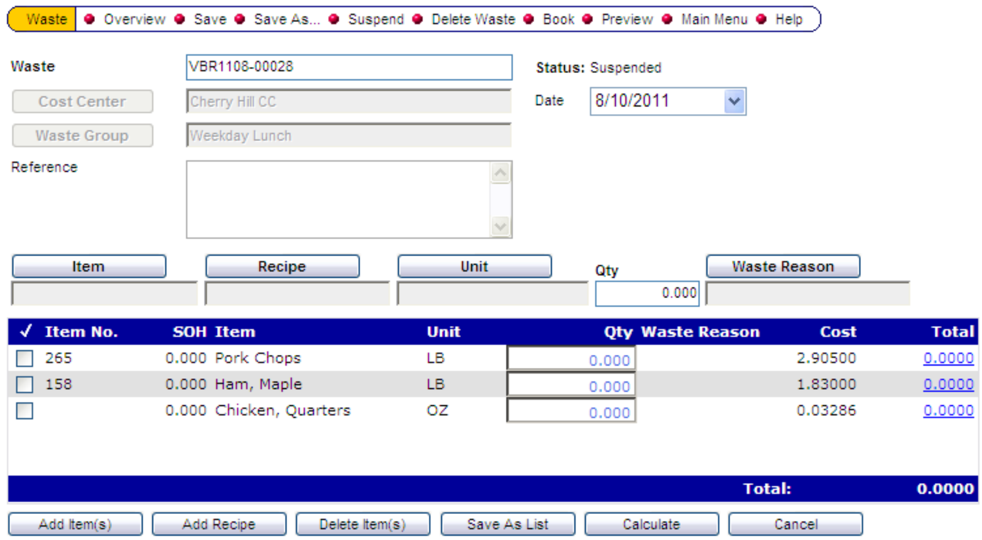
1. Suspended
2. Booked

The steps required to view Waste are the same, regardless of what type of Waste is selected. To view Waste:

1. Select Suspended or Booked from the Waste Overview window:



2. Select the Document Name; the Waste Detail page will be displayed:



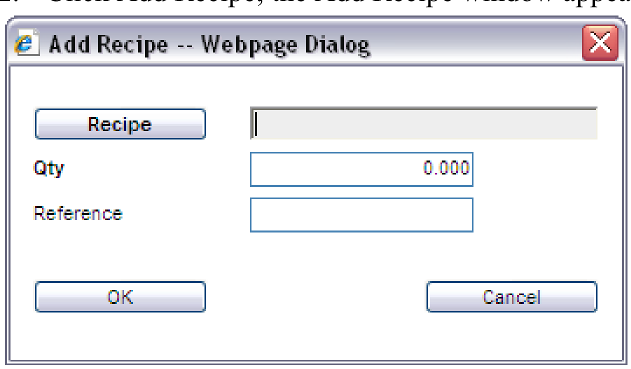
3. If you have selected a Booked Waste document, you will only be able to Print; you may add/delete Recipes and Items in a Suspended Waste document.

Add Recipes to Waste

You can also add Recipes to the Waste document if you want to Waste a Recipe as a whole of ingredients. This helps track the costs of Waste on a "per portion" of a Recipe cost basis.

To add Recipes to a Waste document:

1. Click the name of the Waste document you want to modify from the Document column.
2. Click Add Recipe; the Add Recipe window appears.



3. In the Recipe field, enter the name of the Recipe you want to enter as Waste. If you want to see a list of all of the Recipes you can enter, place the cursor in the

Recipe field and press Enter. A window appears with the Recipes you can select from. Choose the Recipe you want to Waste and click OK.

4. In the Qty field, enter the quantity of portions of the Recipe you want to Waste. Quantity in this case is by portion. If the Recipe is for a cup of soup, and a bowl of soup equals 2 cups of soup, and you are wasting a bowl of soup, you would waste 2 portions of the Recipe.
5. In the Reference field, add any information you want to be associated with this Item to appear in the Waste document.
6. Click OK

The Recipe will be added in the Waste Detail window.

Book a Waste Document

To book a Waste document:

1. From the Waste Detail window, from the Top Menu Bar, click Book.

The Booking confirmation dialog will be displayed

2. Click OK in the confirmation box

The Waste document is booked and the Waste Overview screen refreshes with the booked Waste document.

Note	*When a Waste document is booked, depletions from inventory are instantaneous*

Deleting a Waste Document

To delete a document, please refer to the Deleting a Document section.

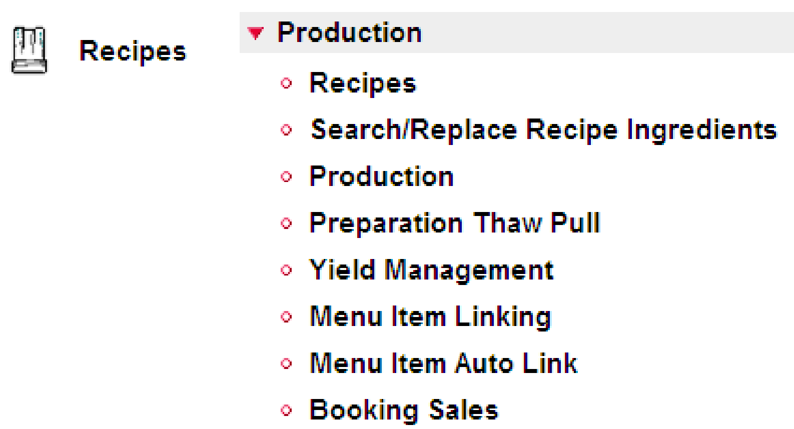
Recipes

Introduction and Overview

You can use myinventory to calculate product cost and manage cooking instructions for each Recipe from a central location. myinventory provides centralized Recipe management. This guarantees that all of your locations will have the most recent cooking instructions and specifications. When a new product is launched, you can have the specs sent to each restaurant simultaneously, as well as make updates instantly. As soon as a change is made to an existing Recipe, or a new Recipe is created, it is available in all of your locations. No more emergency faxes or emails, no more last minute conference calls; the Recipes are available to the entire organization the minute you hit the save key. You can also include up to 3 photos to detail what the Menu Items looks like.

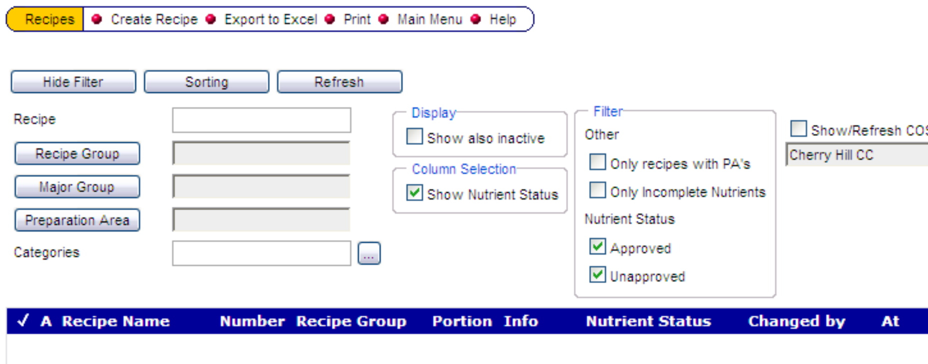
Accessing the myinventory Recipes Module

Click the Recipes icon from the Main Menu or select Recipes from the Production category:

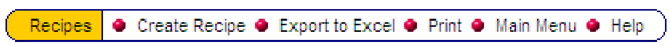


Recipe Overview Window

The Recipe Overview window is the first window you see after accessing Recipes from the Main Menu. If there are no entries in the window, click the Refresh button to populate the window with previously created entries.

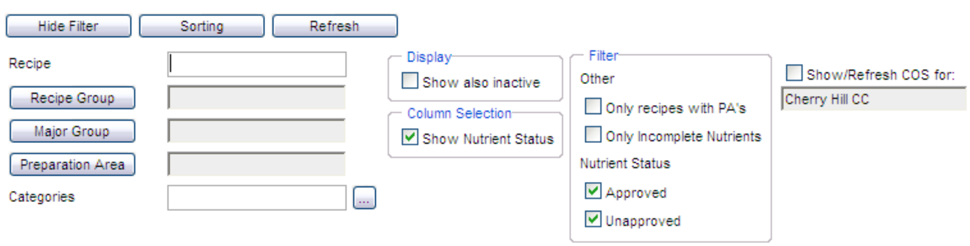


The Top Menu Bar



Menu Item	Description
Create Recipe	Create a new Recipe
Export to Excel	Opens the currently displayed information in an Excel spreadsheet
Print	Prints the currently displayed information
Main Menu	Return to the Main myinventory Menu
Help	Launches the Help file

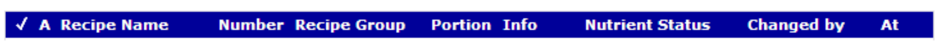
Additional Screen Elements



These filters behave as described in the Welcome section. For more information, please refer to the Screen Layout section of the Welcome page.

Screen Element	Description
Categories	Categories are another way to organize Recipes. They can be given any descriptive titles you wish. There are up to six categories that can be used.
Show also inactive	If you would like to view inactive Recipes that are no longer being used, this feature can be enabled
Show Nutrient Status	This displays a column for Nutrient Status information
Only recipes with PA’s	Enable this if you would like to filter your results by Recipes that are used for Production Items (PA)
Only Incomplete Nutrients	Displays only Recipes that do not have completed Nutrient information included
Nutrient Status: Approved Unapproved	Enable both to see Recipes with either status or: Approved to display only those Recipes with an Approved Nutrient Status Unapproved to display only those Recipes with an Unapproved Nutrient Status
Show/Refresh COS for:	Enable this and select a Cost Center to display the Cost of Sales for the Recipe result set

Information Bar



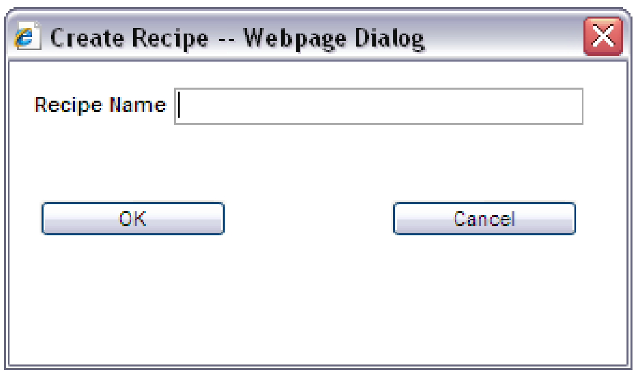
Menu Item	Description
Recipe Name	Displays the name of the Recipe
Number	Displays the number for the Recipe, if it has been assigned one
Recipe Group	Displays the Recipe Group that this Recipe belongs to
Portion	Displays the number of Portions this Recipe yields
Info	Displays any additional information added to the info section of this Recipe
Nutrient Status	Displays the Nutrient Status of this Recipe

Menu Item	Description
Changed by	Displays the name of the last User to modify this Recipe
At	Displays the date and time the last modification was made

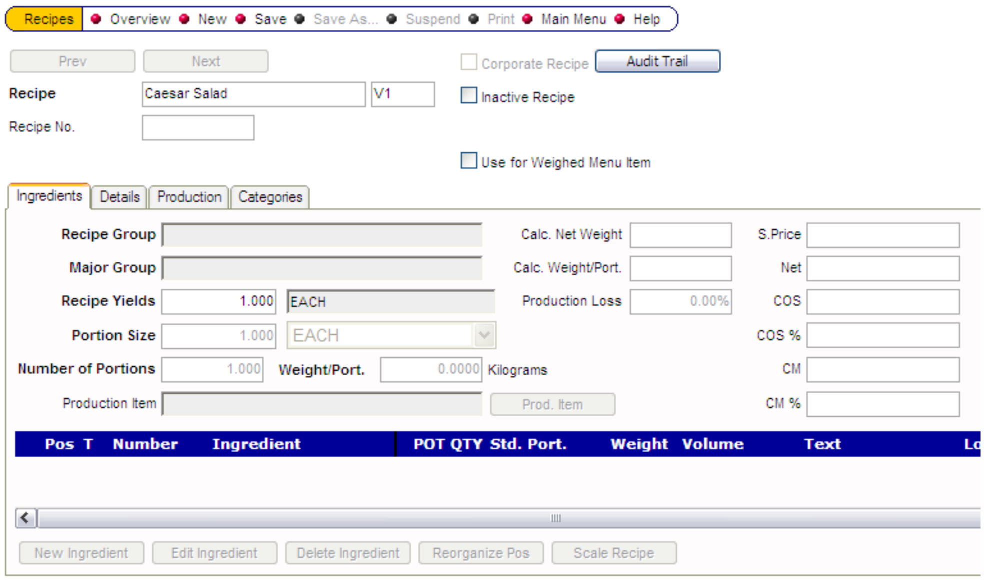
Create a Recipe

The ability to create a Recipe is based on User Rights. If you do not have the Rights that permit you to create a Recipe, this will be grayed out. However, to create a Recipe from the Recipe Overview page:

1. Select Create Recipe from the Top Menu Bar; the following dialog box will be displayed:



2. Enter the Recipe Name and click OK; the Recipe Detail window will be displayed:

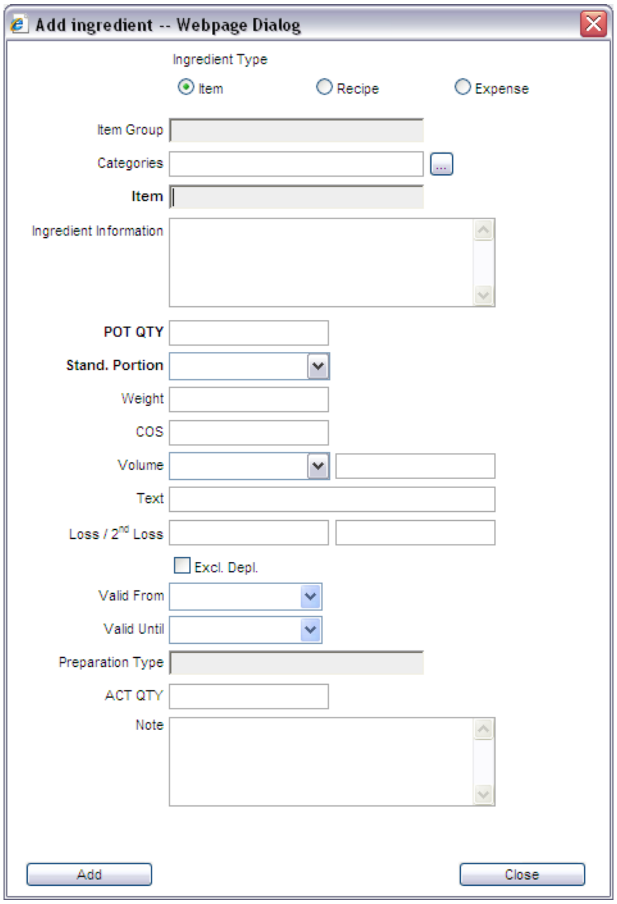


3. Enter the Recipe Group and the Major Group and click Save; the bottom row of buttons and Visibility become available

> **Tips & Tricks**
>
> *Plan portion sizes carefully! Recipes are added to other Recipes by portion and "easy math" is always a good idea. For example, a batch of soup = 360oz; cup of soup = 6oz; bowl of soup = 10oz. Portions should be in ounces so that it is easy to use in any of the Recipes.*
>
> *It would be poor planning to make a portion size in pints – pints could not easily be broken into a 6oz soup cup or a 10oz soup bowl.*

4. Select New Ingredient from the bottom of the page to begin adding Ingredients to the Recipe, indicating quantity and portion; be sure to note Items, Recipes, or

Expenses and click Add; repeat this step until all Ingredients have been added; then click Close.



5. After all Ingredients have been added, determine the Visibility Criteria (if any) by clicking Visibility and identifying the Assignment Group and the Cost Center for which the new Recipe shall exist. (Visibility Criteria only applies to those using the feature)

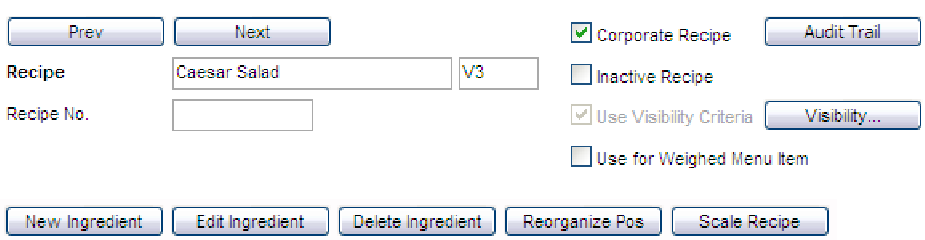
The Recipe Detail Window

The following section describes the Recipe Detail window.

Top Menu Bar

Menu Item	Description
Overview	Go to the subject area overview.
New	Create a new Recipe
Save	Saves the Recipe as is and keeps you in the Detail window to continue working on the Recipe
Save As…	Allows you to suspend the Recipe, rename it, and continue working on the Recipe under its new name
Suspend	This saves the Recipe and moves you back to the Overview window where you can continue working on this suspended Recipe at another time
Delete Recipe	Deletes the Recipe
Print	This will create a PDF version of the Recipe information to be printed
Main Menu	Return to the Main myinventory Menu
Help	Launch the Help file.

Additional Screen Elements

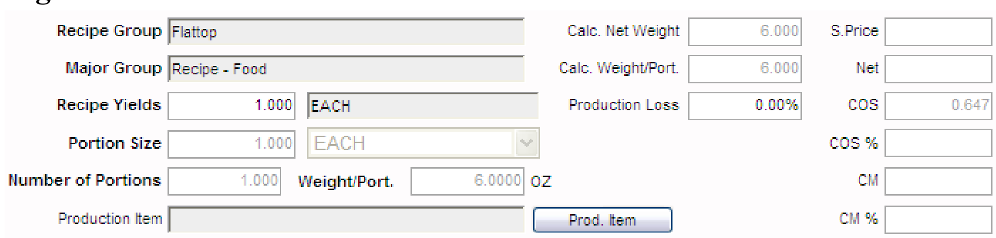


Screen Element	Description
Prev	Return to the previous entry in the Recipe collection
Next	Advance to the next entry in the Recipe collection
Recipe	The name of the Recipe

Screen Element	Description
V1	Shows what version the Recipe is on. Recipes may change over time. A salad made with mixed greens may be modified to be made with escarole instead. This salad with escarole would then be identified as V2.
Recipe No.	Displays the assigned Recipe number
Corporate Recipe	Enable this if the Recipe will be used by the entire Organization
Inactive Recipe	Enable this if the Recipe is no longer active and should not appear in search results
Use for Weighed Menu Item	Enable this is the Recipe will have Weight information sent from the POS for depletion instead of quantity
Audit Trail	If Audit Trail is enabled, this will reveal information about the version or iteration of the Recipe. Recipes can be affected by a number of stimuli. For example, a restaurant that makes its own salsa may have to substitute pre-made salsa if the tomato crops have been affected in their area.
Visibility	This will display a screen where visibility characteristics can be assigned. For more information on Visibility, see the section under Master Data entitled Visibility Criteria
New Ingredient	Use to add new Ingredients to the Recipe. You will be required to identify what kind of Ingredient is being added [Item, Recipe, or Expense Item), as well as the name of the Ingredient being added
Edit Ingredient	This permits you to edit Ingredients that have been added to a Recipe
Delete Ingredient	Delete Ingredients from the Recipe

Screen Element	Description
Reorganize POS	When adding/editing/deleting Items, the positions may become unorganized. Use this to refresh the way in which the Ingredient positions are organized
Scale Recipe	Scaling a Recipe is taking an existing Recipe and modifying the quantity of ingredients, portion amount, or portion size, without having to change each individual Ingredient

Ingredients Tab



- Recipe Group – Displays the name of the Recipe Group
- Major Group – Displays the name of the Major Group
- Recipe Yields – Displays the amount the Recipe yields
- Portion Size – Displays the size of one portion
- Number of Portions – Displays the number of portions created by the Recipe
- Weight Port – Displays the actual weight of the selected portion
- Production Item – This opens a pop-up window that allows you to configure the Recipe as a Production Item
- Calc. Net Weight – This is the calculated net weight of the Recipe
- Calc Weight/Port – This is the calculated weight of a portion of the Recipe
- Production Loss – Displays the percentage of loss that is generated through the creation of this Recipe
- S Price – Displays the sales price of one portion
- Net – Net sales price

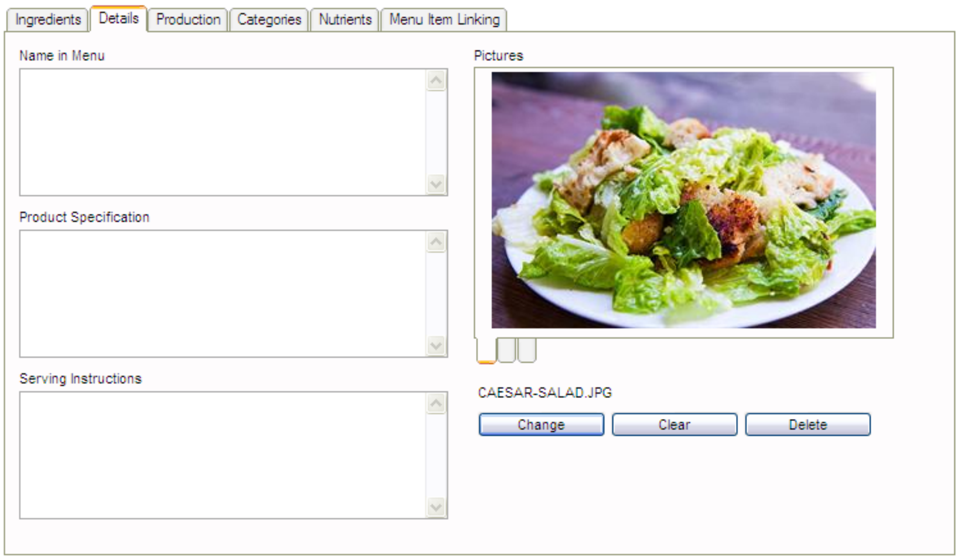
- COS – Displays the cost of sales
- % COS – percentage of profit from inventory costs to sales price
- CM – cost margin
- CM % - the percentage of cost required to create the portion

Information Bar

Screen Element	Description
POS	Position of the Ingredient in the Recipe
T	Type – Item, Recipe, or Expense Item
Ingredient	Displays the Item name used in this Recipe
POT QTY	Shows the quantity of the Item used per Recipe
Std Port	Displays the standard Production Unit used to create the Recipe
Weight	Displays the actual weight of the quantity of this Item
Volume	Displays the volume of the quantity of this Item
Text	Displays any additional descriptions that have been included for the Item
Loss	Percentage of how much of the Item is lost during the initial preparation of the Recipe
2nd Loss	Percentage of any additional losses as the result of any subsequent preparation techniques
ACT QTY	Quantity per Base Unit
BU	Base Unit
AVE	Displays the average cost of sales per Item
COS	Displays the cost of sales at the selected default recipe store
Valid From	Displays the date the Ingredient is Valid From
Valid Until	Displays the date the Ingredient is Valid Until
Excl Depl	Exclude from Depletion – Items with this classification will not be depleted as the Recipe is sold; for example, water added to a soup is not depleted from anything

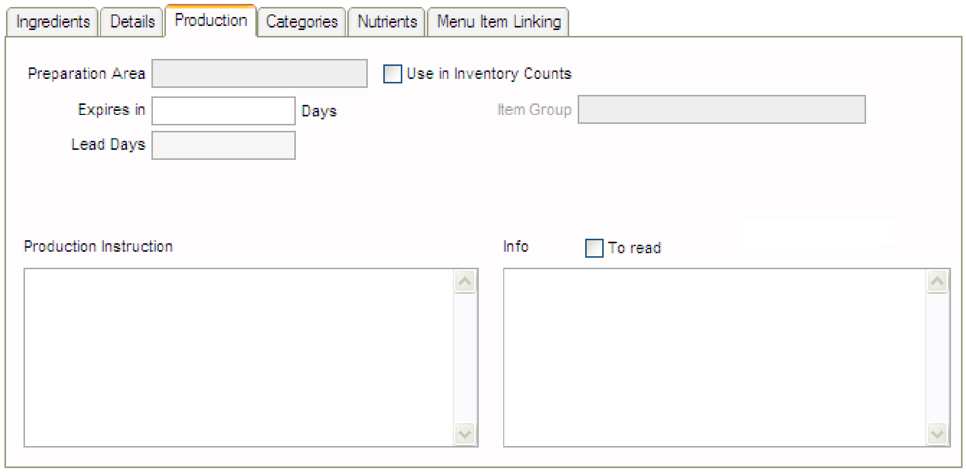
Screen Element	Description
Preparation Type	This is how the Item is prepared in the Recipe
Note	This field is optional and allows for any special instructions

Details Tab



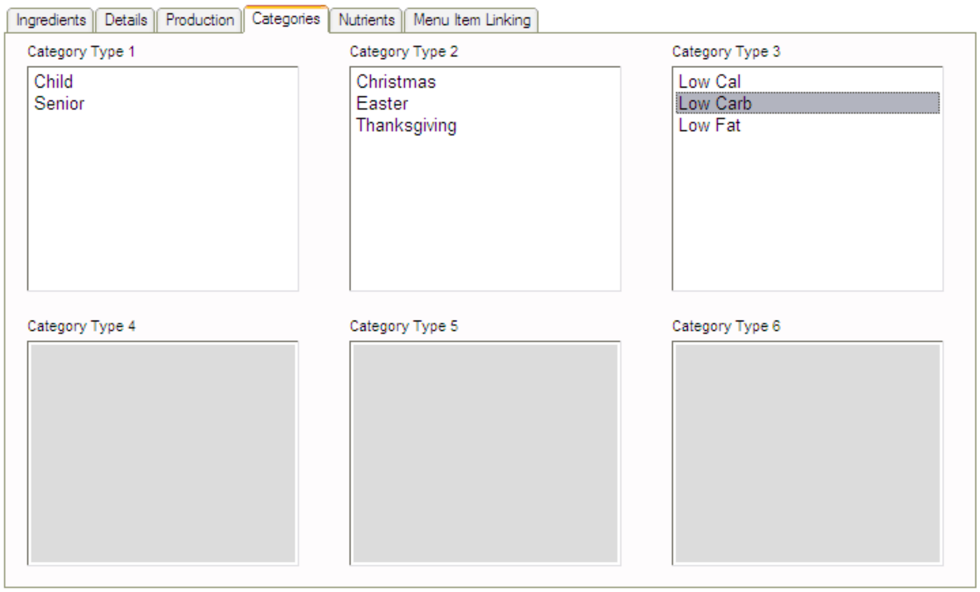
- Names in Menu – Displays the name of the Item in the Menu; for example, a Menu Item might be called a Monster Burger, but in the kitchen it would be displayed as 2X 1/4lb patty hamburger
- Production Specification – these are the preparation instructions, such as “cook 3 minutes per side” or “microwave on high 30 seconds”
- Service Instructions – Displays any instructions on how to serve/garnish/deliver this Recipe to the customer (ex. “include steak knife” or “add parsley garnish on mashed potatoes”, “all fish receives lemon wedge”, etc)
- Pictures – This field allows for any picture of the Recipe; it can include preparation pictures, plating examples, etc.

Production Tab



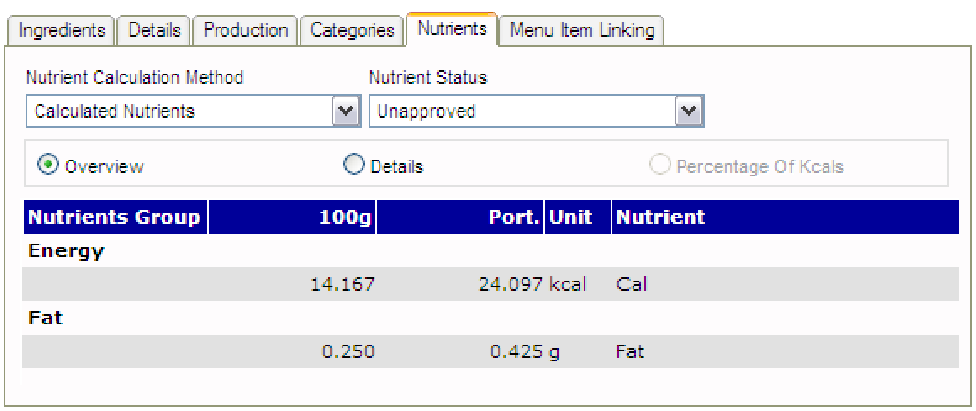
- Preparation Area – Describes where in the restaurant the Recipe is prepared; for example, fried shrimp would be battered in the prep kitchen, whereas a Long Island Iced Tea would be made behind the bar
- Expires In – Displays how many days this Recipe can be made ahead and be used; for example, cheesecake may have a shelf life of 3-7 days, therefore, if the cheesecake is created on March 1, it would need to be thrown away by March 7
- Lead Days – Displays the amount of days between preparation
- Use in Inventory Counts – Enabling this option will allow the Recipe to be counted as an Item in inventory counts; Recipes counted as Items will need to be pulled into an inventory count or list, allowing it to be added to a storage location
- Item Group - Displays the Item Group that the Production Item belongs to
- Production Instruction – Enter any instructions on creating this Recipe from a production point of view
- Info – Information field
- To Read – enabling this option will allow anything entered in the information field to be available to anyone who has access to this module. Not setting this option will only allow the author to view the information

Categories Tab



- Category Type 1 – 6 – can be used for menu planning

Nutrients Tab

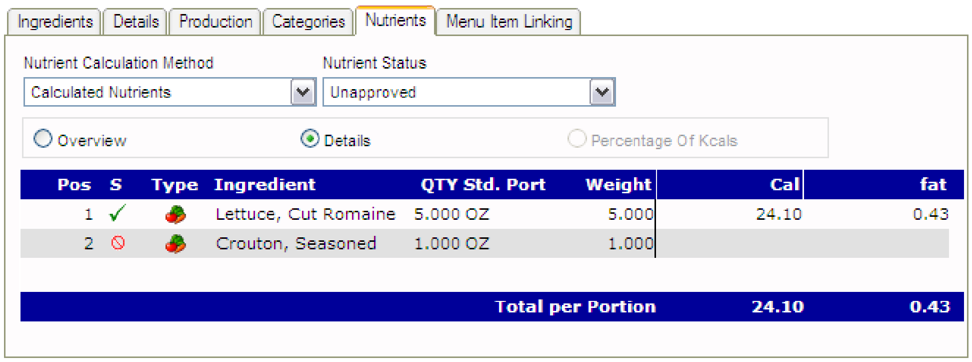


- Nutrient Calculation Method - Select Calculated Nutrients to use Nutrient information from each Ingredient, as set in Master Data | Items. Select Manual to enter Nutrient information yourself

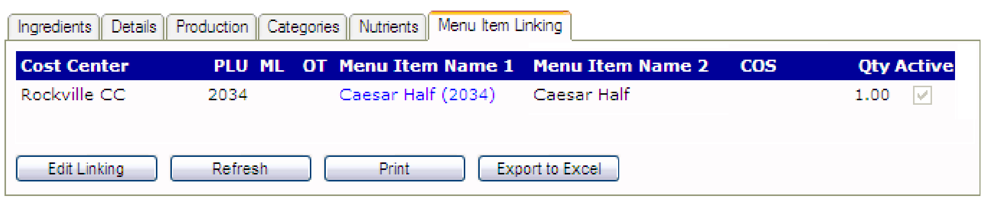
- Nutrient Status - If enabled, this field can be set to Approved once the Nutrients composition has been verified. This will be set to Unapproved if any changes occur in the Recipe that will alter the Nutrient data

- Overview - Displays the totals of each Nutrient in the Recipe. These Nutrients are editable if the Nutrient Calculation Method is set to Manual

- Details - Displays the details of each Ingredient's Nutrient composition. This is only available if the Nutrient Calculation Method is set to Calculated



Menu Item Linking Tab



Menu Item Linking for this Recipe can be administered in this tab. You can create a new Link, edit an exist Link, or delete a Link. You can also edit the quantity of the Linked Recipe that should be depleted.

- Edit Linking - Opens the Menu Item Linking web page dialog. Here you are able to adjust Linking as necessary, while remaining in the Recipes module

- Refresh - Refreshes the screen to display recent changes

- Print - Allows you to print the Linking information

- Export to Excel - Exports the currently displayed information to an Excel spreadsheet

Edit Ingredients in an Individual Recipe

Recipes are always changing. Management may decide a Surf-n-Turf entrée should upgrade to an 8 oz. sirloin from a 6 oz. sirloin. myinventory makes modifying Recipes quick and easy. Also, Recipes can change for one Cost Center, or for an entire organization. This can be beneficial if a Vendor no longer carries a product in one size and only offers it in another.

For example, an organization uses grape tomatoes for their salads; the Vendor they use to provide their produce to all of their Cost Centers plans to discontinue the supply of grape tomatoes, but does offer other tomatoes, like cherry or Roma. A System Administrator can quickly change all Recipes that contain grape tomatoes to reflect these new tomatoes, as well as modify the Ingredient amount; 5 grape tomatoes may be exchanged for 3 slices of Roma tomato.

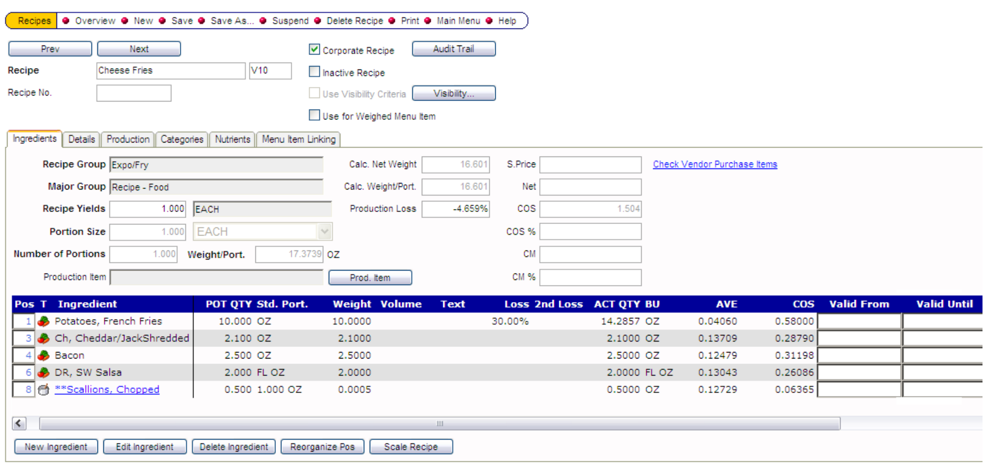
Below are steps to modify an existing Recipe. For our example, we are using the Cheese Fries appetizer. The Recipe includes:

- 10 oz. French Fries
- 2.1 oz. Shredded Cheese
- 2.5 oz. Bacon
- 2 oz. Salsa
- .5 oz. Scallions

We want to increase the Bacon from 2.5 oz. to a 3 oz. and reduce the 2 oz. of Salsa to a 1 oz. portion.

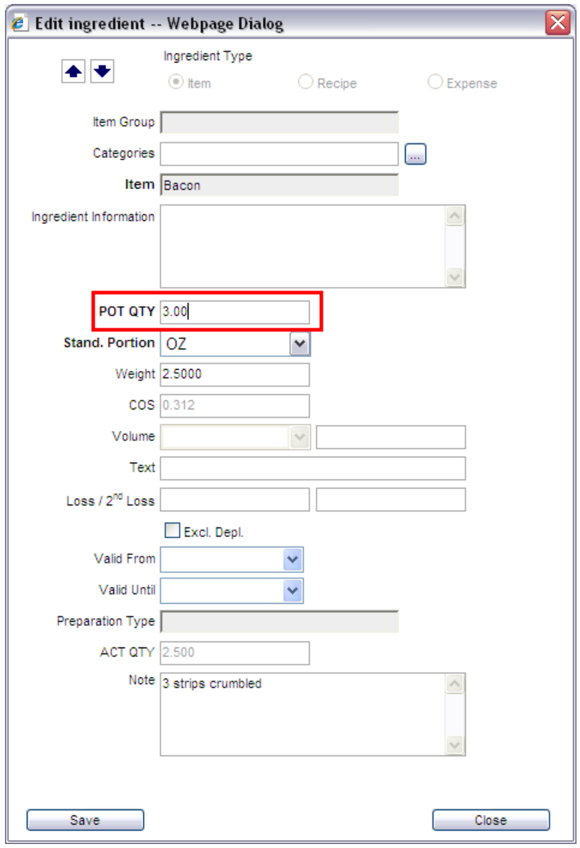
To modify an existing Recipe:

1. Select the Recipe from the Recipe Overview



2. Select the Ingredient to be modified and click the Edit Ingredient button (Bacon); the Edit Ingredient dialog box will be displayed

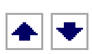
3. Change the QTY field from 2.5 to 3:



4. Click Save

The Bacon quantity has been increased from 2.5 oz. to 3 oz.

5. Use the arrow buttons to move to the next Ingredient (Salsa)



6. Change the QTY field from 2 to 1
7. Click Save

The Salsa quantity has been decreased from 2 oz. to 1 oz.

8. Close the Edit Ingredient Window; the changes will be reflected in the Recipe Detail window

Pos	T	Ingredient	POT QTY	Std. Port.	Weight	Volume
1		Potatoes, French Fries	10.000 OZ		10.0000	
3		Ch, Cheddar/JackShredded	2.100 OZ		2.1000	
4		Bacon	3.000 OZ		3.0000	
6		DR, SW Salsa	1.000 FL OZ		1.0000	
8		**Scallions, Chopped	0.500	1.000 OZ	0.0005	

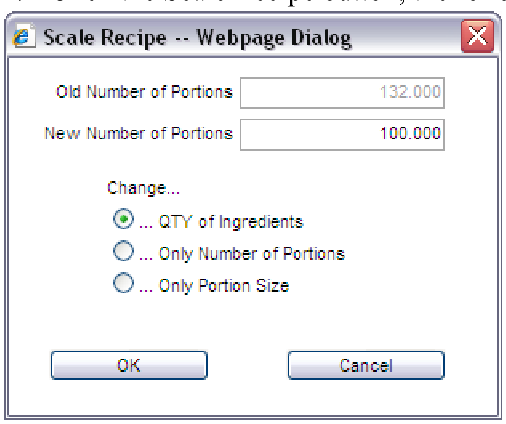
9. Click Save from the Top Menu Bar for your changes to take effect

Be sure to note that in the version field, the number was changed

To Scale a Recipe

To scale a Recipe:

1. Use the filters to recall a Recipe (French Toast Batter)
2. Click the Scale Recipe button; the following dialog window will be displayed:



3. Enter a numeric value in the New Number of Portions field
4. Select the method of scaling for the Recipe:

QTY of Ingredients

Select QTY of Ingredients if you wish to increase or decrease your Recipe size. This is especially useful if you have certain Items that are usually made individually, but can also be made in bulk. For example, you may have a regular menu that has a baked ziti entree, but also has a catering menu that can provide the same baked ziti in a larger quantity.

Only Number of Portions

Select Only Number of Portions for Items that are embedded in other Recipes. For example, mashed potatoes & gravy is a possible side dish for 5 different “meat and potatoes” entrees. The mashed potatoes & gravy are made in bulk, but are served in portions as ordered. Therefore, only a portion of the whole is provided for each.

Only Portion Size

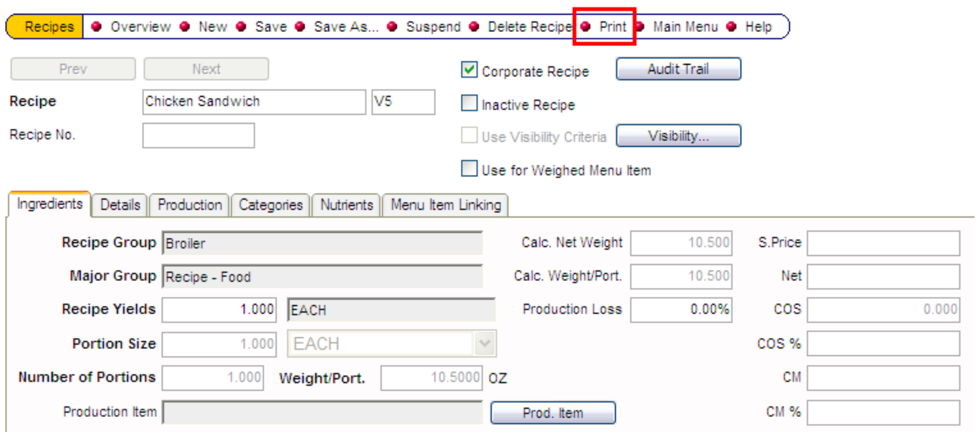
Select Only Portion Size if you wish to increase the size of your portions but do not want to increase the quantity of your Ingredients. For example, you have a banana cream pie that, when sliced, creates 8 servings. You want to increase the size of your slices and slice the pie into 6 slices. Therefore, you would enter 6 in the New Number Portion field and the 1 pie would yield 6 servings.

5. Click OK

Recipe Printing

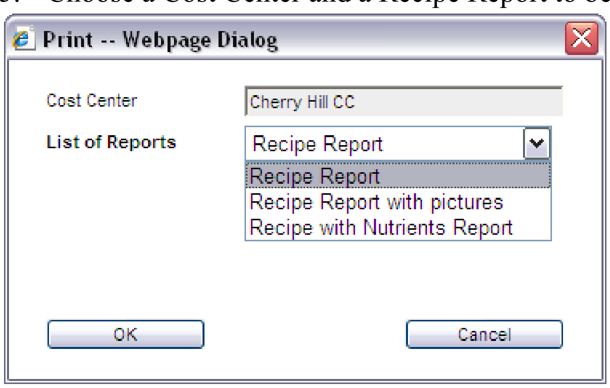
There are many printing options available for Recipes, as every organization has different needs for their cooks. To print a Recipe:

1. Select the Recipe to be printed from the Recipe Overview window
2. Click the Print option from the Top Menu Bar of the Recipe Detail screen:

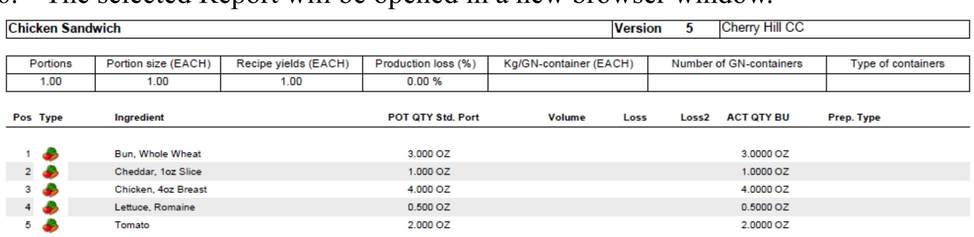


3. A PDF of the Recipe will be opened in a new browser window:

4. To print this page, select the File tab on your browser and choose the Print option. To print one of the three Recipe Report options, click Print from the Top Menu Bar
5. Choose a Cost Center and a Recipe Report to be printed from the drop down:



6. The selected Report will be opened in a new browser window.



7. From here, select the File tab on your browser and choose the Print option.

The Recipe Report with pictures will include any pictures attached to the Recipe in the Details tab.

The Recipe with Nutrients Report will include the Nutritional information for the Recipe.

Search Recipe Ingredients

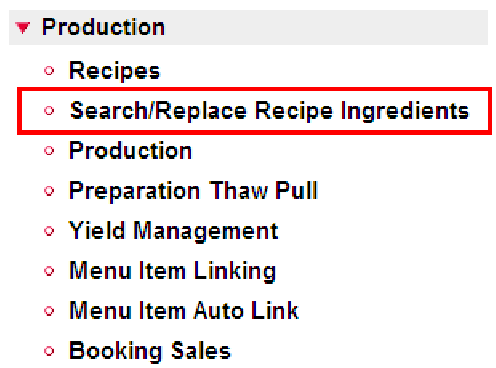
Introduction and Overview

The Search Recipe Ingredients module is where you can do exactly that, search Recipe Ingredients.

Undoubtedly, both large and small organizations can have many Recipes. For larger organizations, the Recipes could potentially number in the hundreds. So what happens when one of the more commonly used Ingredients is being replaced or discontinued? Certainly, you could go Recipe by Recipe, swapping out the old Ingredient and replacing it with the new, but who has the time for that? Especially when the amount of Recipes that contain this Ingredient could number in the hundreds. Instead, the busy Sys Admin can use the Search Recipe Ingredients module to search all of the Recipes of an organization and isolate a specific Ingredient.

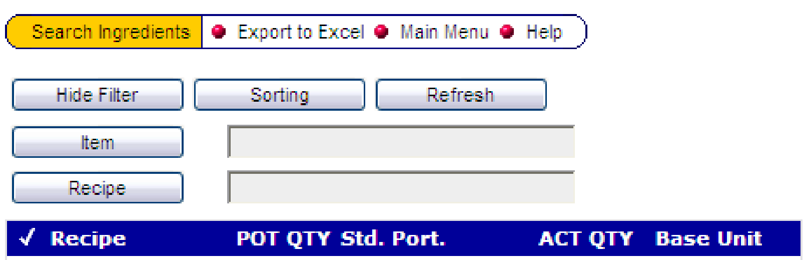
Accessing the Search Recipe Ingredients Module

Click the Search Recipe Ingredients icon from the Main Menu or select the option from under the Production level tasks:



The Search Recipe Ingredients Overview Window

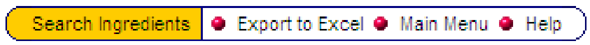
The first page you will see after selecting the Search Recipe Ingredients module is the Overview window:



The following sections describe the Search Recipe Ingredients screen elements.

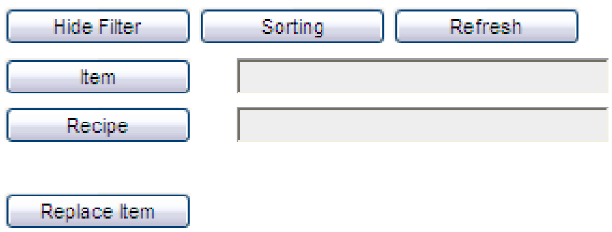
Top Menu Bar

The Top Menu Bar is described below and is consistent throughout the application with only subtle differences.



Menu Item	Description
Export to Excel	Exports the currently displayed information to an Excel spreadsheet
Main Menu	Return to the Main myinventory Menu.
Help	Launch the Help file.

Additional Screen Elements



These filters behave as described in the Welcome section. For more information, please refer to the Screen Layout section of the Welcome page.

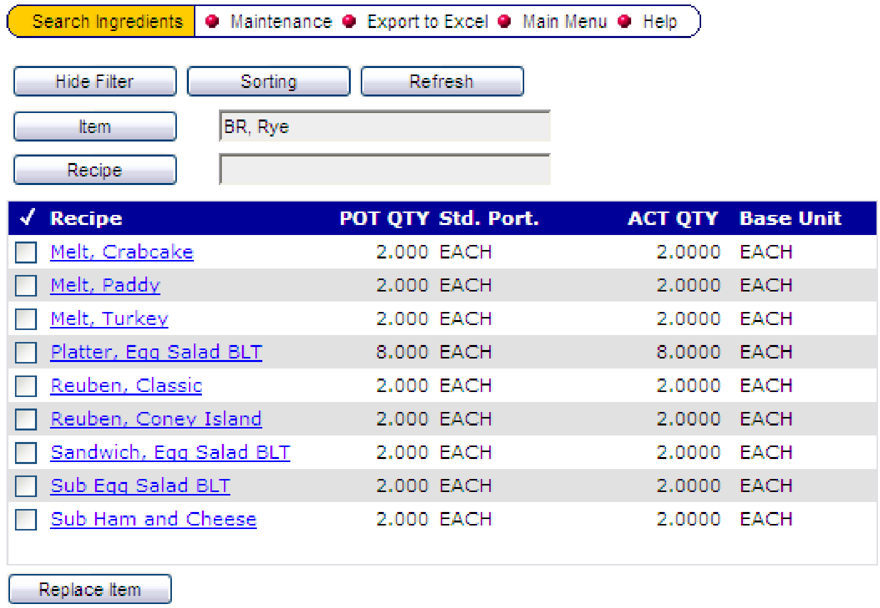
Screen Element	Description
Replace Item	Use this after you have selected the Item you wish to replace. For example, you want to replace a common Ingredient in many Recipes. You can search for all Recipes that contain this Ingredient and replace them in one step, rather than replacing them individually.

Note *The ability to use the Replace Item feature is enabled by a User Right in the Maintenance module. For more information, see Appendix 1*

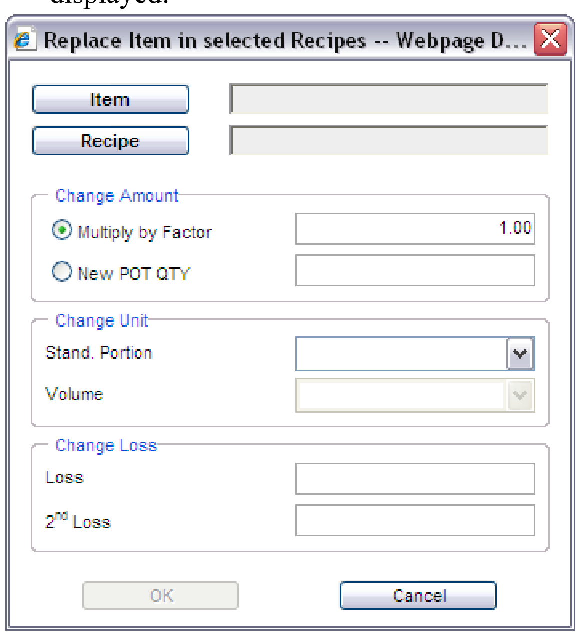
Open and Modify a Recipe

To search for and modify a Recipe Ingredient:

1. Enter the name of the Item in the Item field (place your cursor in the Item field if you wish to see a list of available items); click Refresh



2. Select the Recipe(s) from the list that will be modified; for all Recipes, select the check at the top of the list in the Information Bar
3. Click Replace Item; the Replace Item in selected Recipes dialog window will be displayed:



4. Enter the name of the new Item/Recipe; place your cursor in the Item/Recipe field to see a list of available Items
5. Determine how the quantity will be changed:

Screen Element	Description
Change Amount: Multiply by Factor New POT Qty	Multiply by Factor - Enter the amount that the Replaced Ingredient should be multiplied by in the Recipe(s) New POT Qty - Enter the new quantity of the Replaced Ingredient to be added to the Recipe(s)
Change Unit: Stand. Portion Volume	Stand. Portion - The Ingredient Portion size may be changed in this field Volume - Not used by the myinventory application
Change Loss: Loss 2nd Loss	If the Ingredient has a Loss associated with it, define the percentage(s) in this section. Two losses may be associated with this Ingredient. (Functionality of these losses is the same as Items in Master Data)

Factor is the ratio by which the Unit will be changed. For example, the Unit within the Recipe for cheese slices is set to ounces; if a 1oz slice of American Cheese is to be replaced by a 1.5oz slice of cheddar cheese, then the factor will be 1.5.

6. Click OK

The page will display. To see your new Recipes, enter the name of the new Item in the Item field. Your Recipes should be displayed.

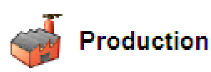
Production

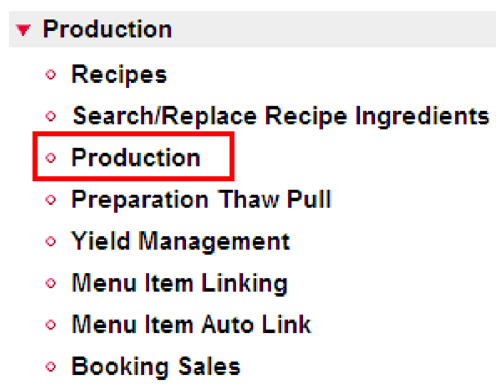
Introduction and Overview

Production is where Users can take Batch Recipes and turn them into Production Items. For example, a sandwich shop could sell every sandwich with a side of freshly made 2oz potato salad. If the shop sells 25 sandwiches a day, it most certainly is not going to make every 2oz cup of potato salad fresh each time. They're going to make 50oz of potato salad and turn it into a Production Item. This means that with every sandwich made, 2oz of potato salad will be included in the overall recipe. Creating Production Items also allows you to inventory the product as one Item, as opposed to mathematically factoring how much of each ingredient is included in the amount of potato salad at inventory time.

Accessing the Production Module

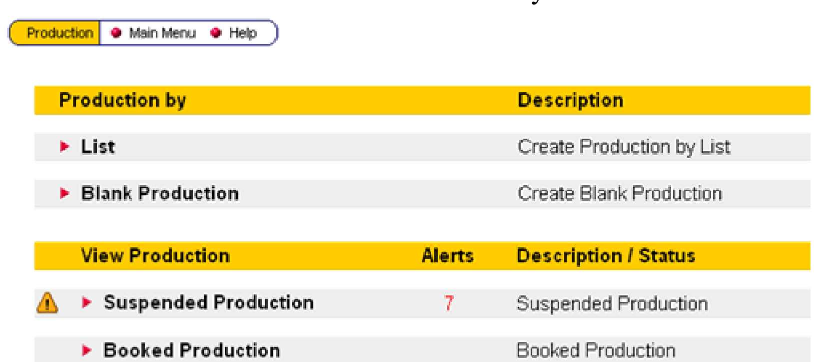
Click the Production icon from the Main Menu or select Production from the Production Tasks:





Production Overview Window

The Production Overview is the first window you access in the Production Module:



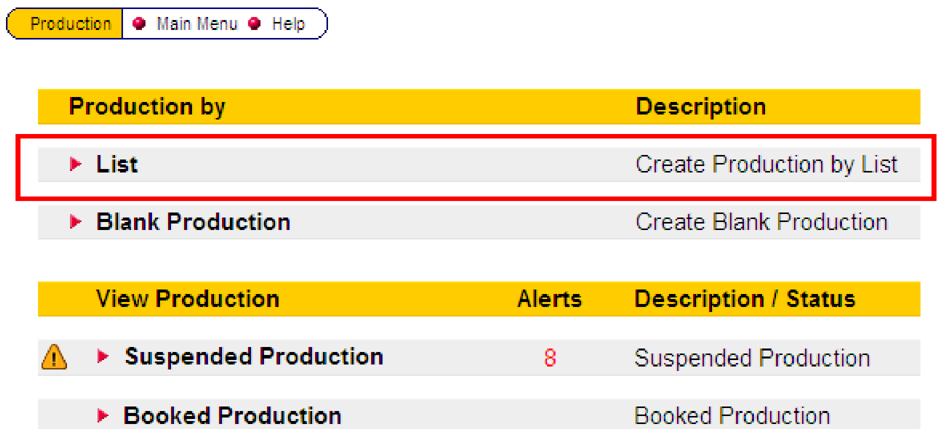
From this window, you can enter a new Production or complete a suspended Production. You can also view Productions that have already been completed or booked.

Create a Production

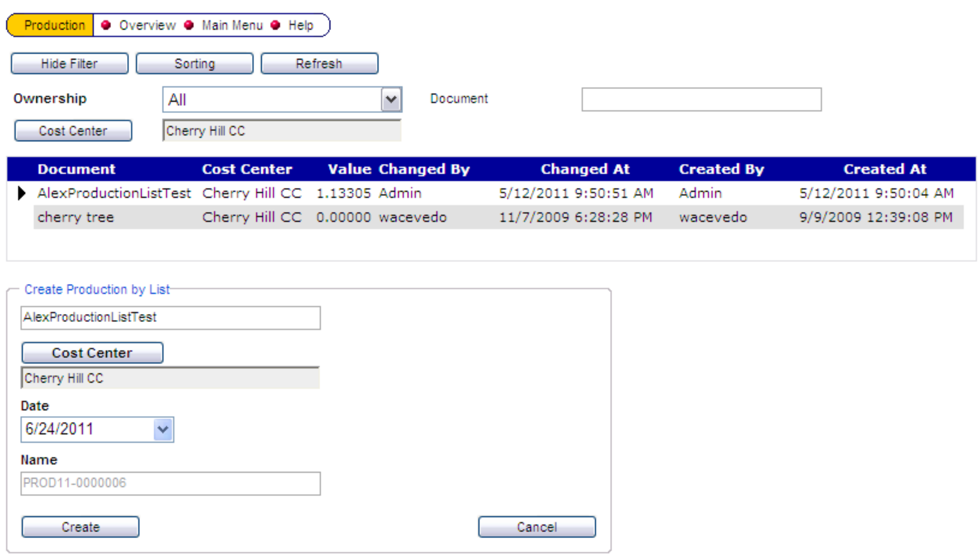
Productions can be created one of two ways; either based on a List or from scratch via Blank Production.

Create a Production by List

1. Select List from the Production Overview window:



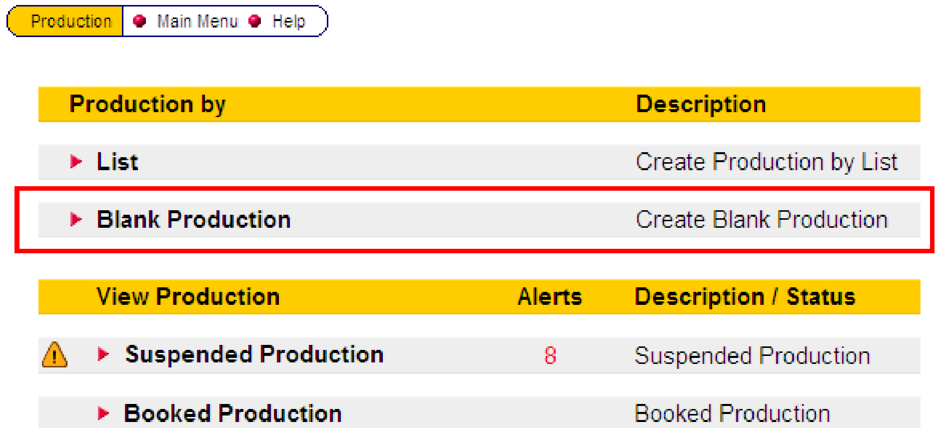
2. Select a Production List, enter a name (required) and click Create:



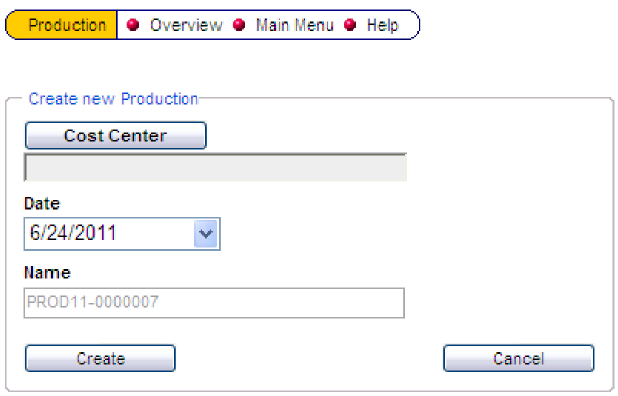
The Production detail page will be displayed

Create a Blank Production

1. Select Blank Production from the Production Overview window:



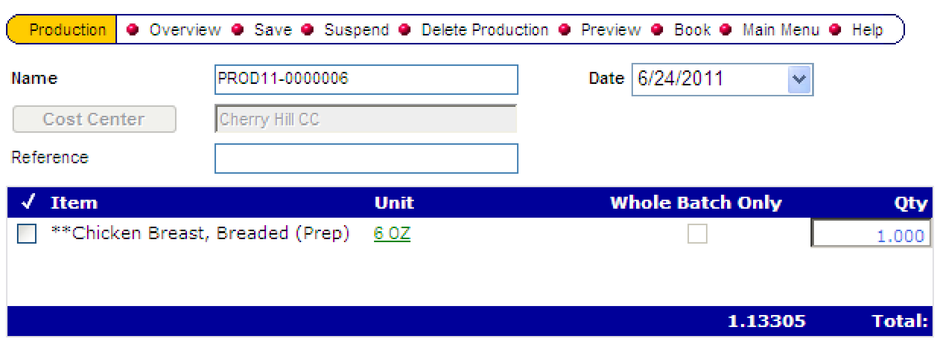
2. Enter a Cost Center and Date and click Create:



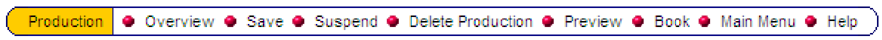
The Production detail page will be displayed

The Production Detail Window

The following section describes the Production Detail window.

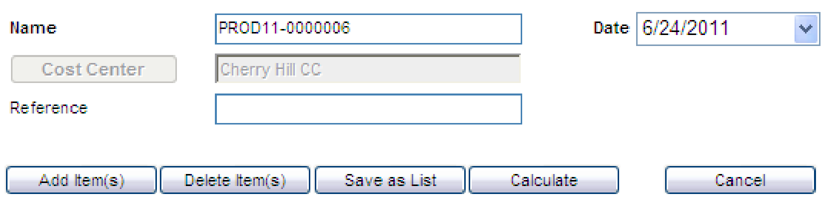


Top Menu Bar



Menu Item	Description
Overview	Go to the subject area overview
Save	Saves the Production
Suspend	Saves the Production and returns you to the Overview window. Suspended Productions are highlighted in green.
Delete Production	Deletes the current Production and returns you to the Overview window
Book	Books the Production
Main Menu	Return to the Main myinventory Menu
Help	Launch the Help file

Additional Screen Elements



These filters behave as described in the Welcome section. For more information, please refer to the Screen Layout section of the Welcome page.

Screen Element	Description
Cost Center	Displays the name of the Cost Center
Date	Shows the date this Production will take/has taken effect
Name	This is the name of the Production; the system will automatically generate a code in this field
Add Items(s)	Displays the Add Items window
Delete Item(s)	To delete an Item, select it by checking the box to the left of the Item(s). Then, click Delete Item(s) to delete the Item(s) from your Production
Calculate	Use this option whenever you would like a Total for the Production to display at the bottom of the detail grid
Cancel	Cancels the Production, but does NOT delete it

Information Bar

Screen Element	Description
Item	Displays the name of the Production Item
Unit	Displays the Base Unit of Measure for this Production Item
Whole Batch Only	Enabling whole batch will characterize the Production Item as being a whole of the Recipe. It is possible to create partial batches of a Production Item
Qty	Enter a value here to change the quantity of this Production Item

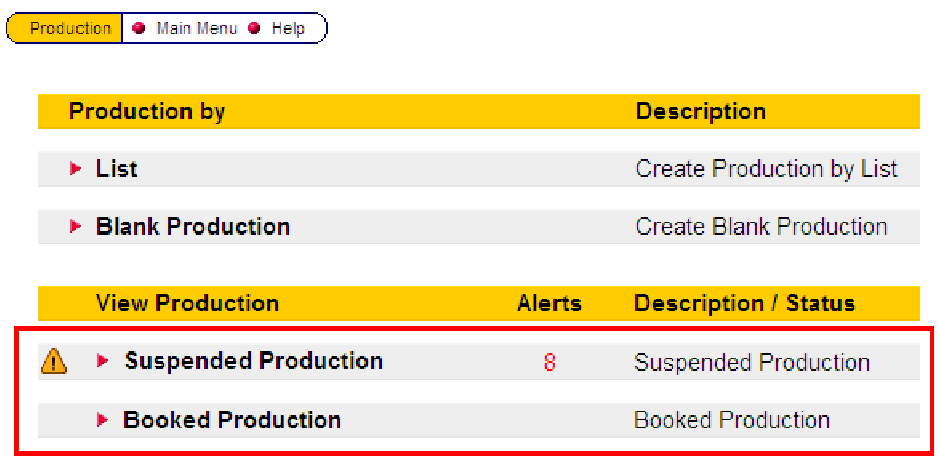
Viewing Productions

There are two categories of Productions:

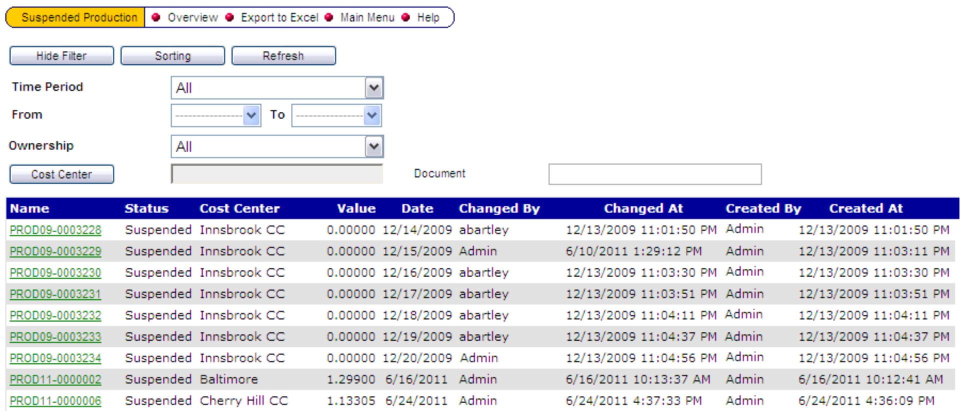
1. Suspended
2. Booked

Regardless of whether you want to view Suspended Productions or Booked Productions, the steps required to achieve this are the same, except for the selection of Suspended vs. Booked, or vice versa. To view a Production:

1. Select Suspended or Booked from the Production Overview window:



2. Select the Production Name:



Name	Status	Cost Center	Value	Date	Changed By	Changed At	Created By	Created At
PROD09-0003228	Suspended	Innsbrook CC	0.00000	12/14/2009	abartley	12/13/2009 11:01:50 PM	Admin	12/13/2009 11:01:50 PM
PROD09-0003229	Suspended	Innsbrook CC	0.00000	12/15/2009	Admin	6/10/2011 1:29:12 PM	Admin	12/13/2009 11:03:11 PM
PROD09-0003230	Suspended	Innsbrook CC	0.00000	12/16/2009	abartley	12/13/2009 11:03:30 PM	Admin	12/13/2009 11:03:30 PM
PROD09-0003231	Suspended	Innsbrook CC	0.00000	12/17/2009	abartley	12/13/2009 11:03:51 PM	Admin	12/13/2009 11:03:51 PM
PROD09-0003232	Suspended	Innsbrook CC	0.00000	12/18/2009	abartley	12/13/2009 11:04:11 PM	Admin	12/13/2009 11:04:11 PM
PROD09-0003233	Suspended	Innsbrook CC	0.00000	12/19/2009	abartley	12/13/2009 11:04:37 PM	Admin	12/13/2009 11:04:37 PM
PROD09-0003234	Suspended	Innsbrook CC	0.00000	12/20/2009	Admin	12/13/2009 11:04:56 PM	Admin	12/13/2009 11:04:56 PM
PROD11-0000002	Suspended	Baltimore	1.29900	6/16/2011	Admin	6/16/2011 10:13:37 AM	Admin	6/16/2011 10:12:41 AM
PROD11-0000006	Suspended	Cherry Hill CC	1.13305	6/24/2011	Admin	6/24/2011 4:37:33 PM	Admin	6/24/2011 4:36:09 PM

Note *Suspended Productions will be displayed in green. Booked Productions will be displayed in blue. You will only be able to modify the Suspended Productions, not the Booked Productions.*

The Production Detail page will appear

Add Items to a Production

To add, please refer to the Add Items section of this document.

Delete Items from a Production

To delete, please refer to the Delete Items section of this document.

Book a Production

After you have created the Production and are ready to finalize it, you can book it.

1. From the Production Detail window, click Book from the Top Menu Bar

Note *Make sure the Production date is in the past or present, otherwise the Production will not be booked*

Once you book a Production, you cannot UN-book it

Stock On Hand changes from the Ingredients to the Production Item immediately after you book the Production.

2. Click OK from the next dialog box

The Production detail page will refresh. To see your recently booked Production, under “Show Production of Status”, reset your filters to view “Booked”. Your “Produced” record will be displayed.

Delete a Production

To delete a Productions, please refer to the Deleting a Document section of this document.

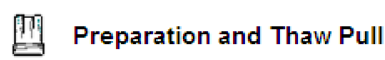
Preparation and Thaw Pull

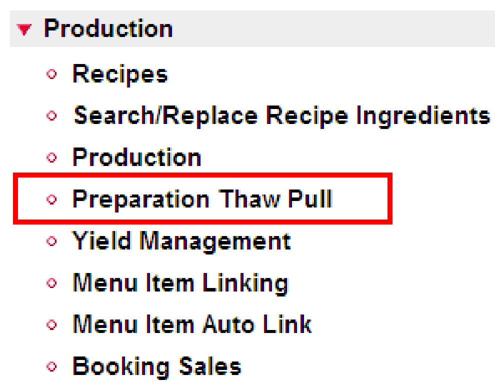
Introduction and Overview

Preparation and Thaw Pull is a module that is for viewing purposes only. That being said, an abundance of information can be found here with regard to planning, i.e. how much produce must be pulled from the freezer/refrigerator and prepared to create as little waste as possible. Preparation and Thaw Pull will help forecast how much of something should be pulled or prepped, based on the previous 8 weeks of sales.

Accessing the myinventory Preparation and Thaw Pull Module

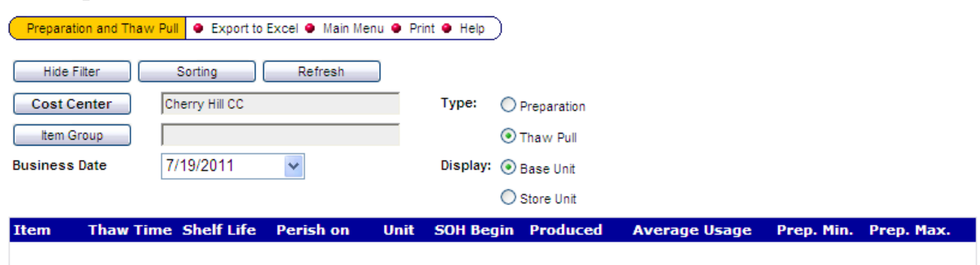
Click the Preparation and Thaw Pull icon from the Main Menu:





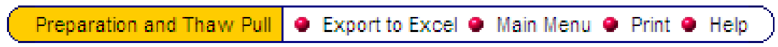
Preparation and Thaw Pull Overview Window

The first window you come to after selecting the Preparation and Thaw Pull icon is the Preparation and Thaw Pull Overview window:



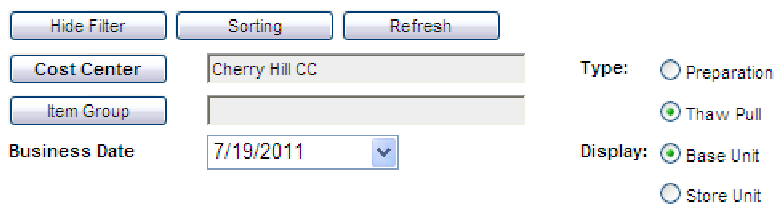
The following section describes the elements contained in the Preparation and Thaw Pull Overview window.

Top Menu Bar



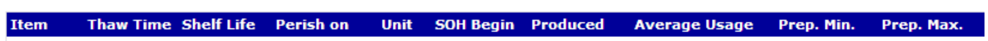
Menu Item	Description
Export to Excel	Exports the currently displayed information into an Excel spreadsheet
Main Menu	Return to the Main myinventory Menu
Print	Prints the currently displayed information
Help	Launches the Help file

Additional Screen Elements



These filters behave as described in the Welcome section. For more information, please refer to the Screen Layout section of the Welcome page.

Information Bar



Screen Element	Description
Item	Displays the Item name
Thaw Time	Displays the length of time it takes for the Item to thaw for use
Shelf Life	Displays the length of time the Item will be usable/fresh
Perish On	Displays the day the Item will no longer be of use and will need to be classified as Waste
Unit	Displays the Unit of the Item
SOH Begin	Displays the Stock on Hand before Production
Produced	Displays how much of the Item was produced
Average	Displays the average usage of the Item over averaged sales

Screen Element	Description
Prep. Min.	Displays the minimum amount of the Item that must be prepared for average sales
Prep. Max	Displays the maximum amount of the Item that should be prepared to cover the estimates based on average sales

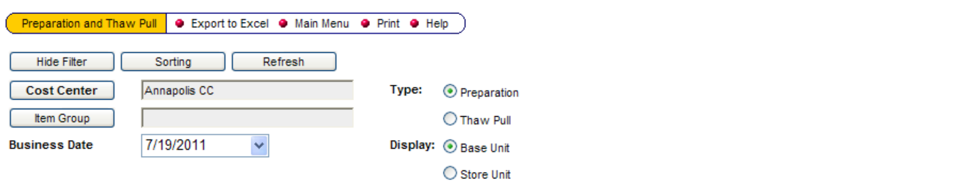
View Prep/Thaw Pull Statistics

Items must be entered into the system as either a Prep Item or a Thaw Item in Master Data | Items | Production tab.

Tips & Tricks *Prep and Thaw Pull settings must be set on Items before this module will show data. Sales depletions must also be active.*

1. Select a Cost Center: Annapolis CC
2. Select an Item Group if desired
3. Select a Type: Preparation
4. Select the Unit to display: Base Unit
5. Click Refresh

All Items that apply to the configured filter settings with Preparation and Thaw Pull classifications applied to them will be displayed.



Item	Lead Days	Shelf Life	Perish on	Unit	SOH Begin	Produced	Average Usage	Prep. Min.	Prep. Max.
**Turkey Breast Sliced 3oz		2	Thursday	OZ	-9.000	0.000	5.500	11.000	14.000
^^Ahi Tuna		2	Thursday	EACH	-3.000	0.000	11.250	8.000	14.000
^^Ham Maple Slice		4	Saturday	OZ	-13.500	0.000	90.000	31.000	104.000
^^Lobster Salad		3	Friday	OZ	2.000	0.000	45.667	15.000	44.000
^^Mango Salsa		3	Friday	FL OZ	76.000	0.000	58.583	0.000	0.000
^^Sausage Bacon Egg		3	Friday	EACH	0.000	0.000	0.000	0.000	0.000
^^Grilled Chicken		3	Friday	OZ	37.000	0.000	242.417	34.000	205.000
^^Pancake Batter		2	Thursday	FL OZ	246.000	0.000	293.667	0.000	48.000
^^Pepper/Onion Mix		3	Friday	OZ	-12.500	0.000	82.250	38.000	95.000
^^Roast Beef Slice		3	Friday	OZ	-61.500	0.000	78.000	87.000	140.000
^^Salmon Filets		3	Friday	EACH	10.500	0.000	18.333	0.000	8.000
^^Strawberry Cup		3	Friday	EACH	0.000	0.000	1.000	0.000	1.000
^^Turkey Breast Slice		2	Thursday	OZ	93.000	0.000	133.750	156.000	227.000
^^Wheat Pancake Mix		2	Thursday	FL OZ	0.000	0.000	2.667	3.000	3.000
^^Yogurt Parfait		3	Friday	EACH	7.000	0.000	3.667	0.000	0.000

Yield Management

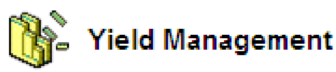
Introduction and Overview

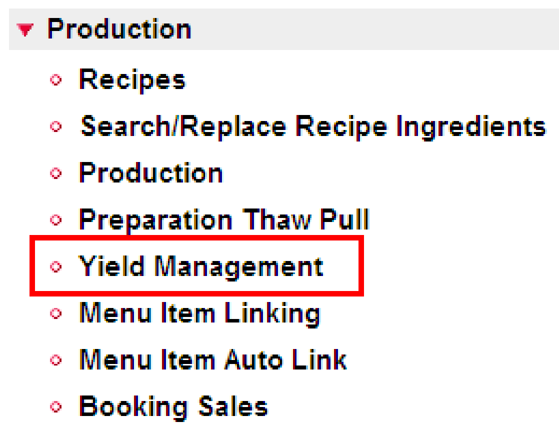
Yield Management is a module that gives the User the ability to break one Item into multiple parts, and assign those multiple parts accordingly, as either waste or product.

For example, let's say an establishment receives lettuce in 1 lb. heads and shreds it in house. The 1 lb. head of lettuce has 12oz of usable lettuce and a 4oz stem. That 12oz portion is shredded as the usable quantity and the 4oz stem is assigned as waste. Ergo, that 1 lb. head of lettuce yielded 2 separate parts: shredded and waste.

Accessing the myinventory Yield Management Module

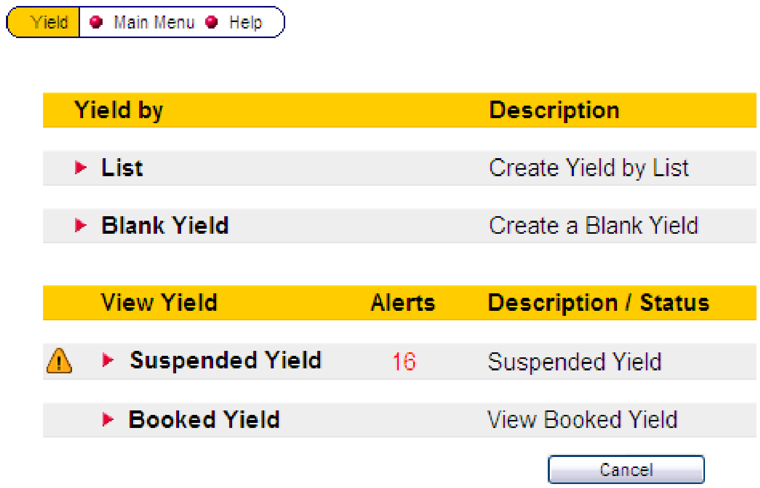
Click the Yield Management icon from the Main Menu or select the Yield Management option from the Production menu:





Yield Management Overview Window

The first window you come to after accessing the Yield Management icon is the Yield Management Overview window:



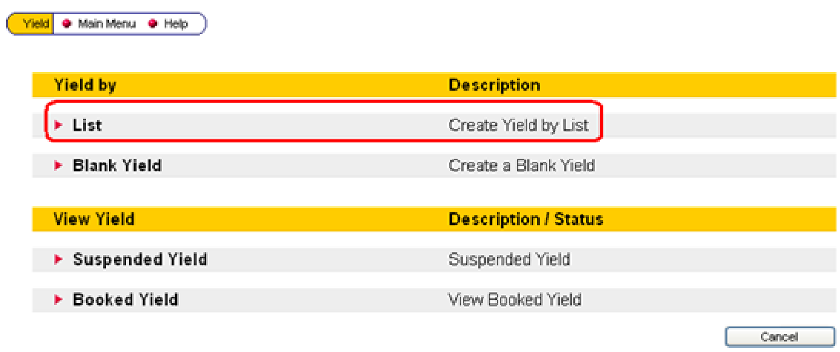
Create a Yield

There are two methods by which Yields may be created:

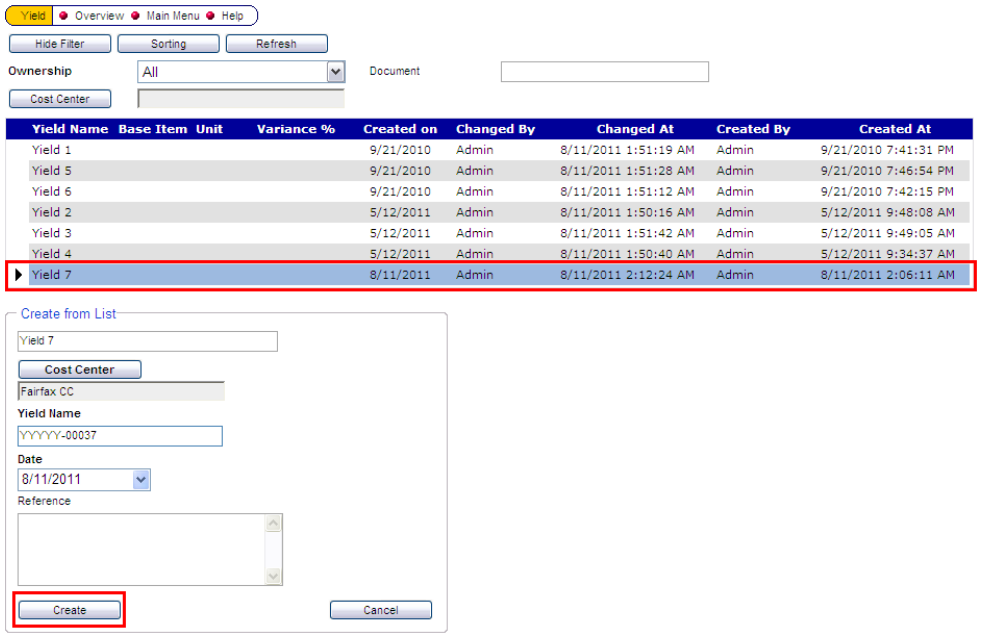
1. By List
2. Blank Yield

To create a Yield by list:

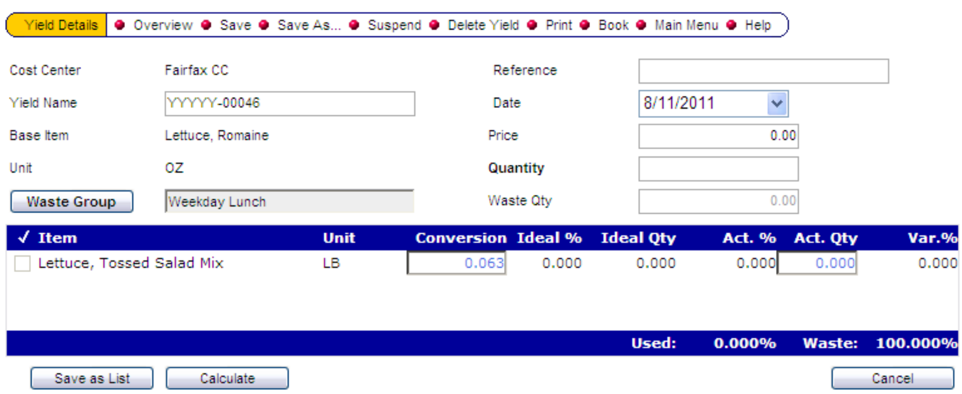
1. Select List from the Yield Management Overview window:



2. Select a List, enter a Cost Center, modify the Yield name and/or date (if necessary), enter any pertinent information in the Reference field and click Create:



3. The Yield Detail window will be displayed:

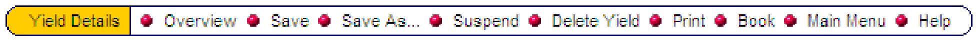


4. While in the Yield Detail window, you can modify, save, or suspend the Yield.

The Yield Detail Window

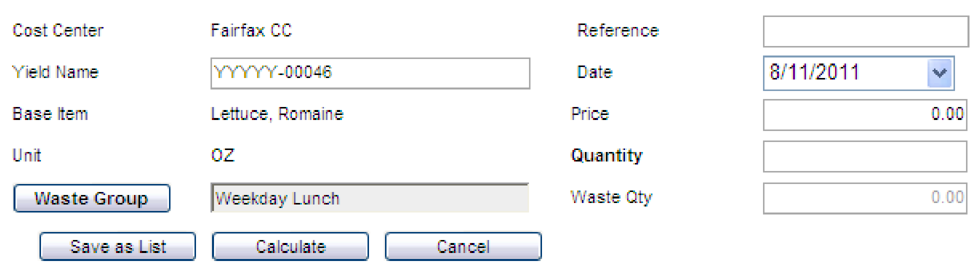
The following section describes the Yield Detail window.

Top Menu Bar



Menu Item	Description
Overview	Go to the subject area overview.
Save	Saves the Yield
Save As…	Allows you to suspend the Yield, rename it, and continue working on the Yield under its new name.
Suspend	Allows you to save the Yield and returns you to the Overview window where you can continue working on this suspended Yield at another time. Suspended Yields are highlighted with the color green.
Delete Yield	Deletes the current Yield and returns you to the Overview window.
Print	Allows you to print out your Yield.
Book	Books the Yield.
Main Menu	Return to the Main myinventory menu.
Help	Launch the Help file.

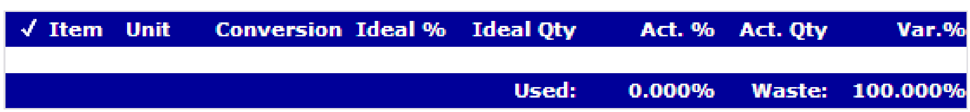
Additional Screen Elements



Screen Element	Description
Cost Center	Shows the current Cost Center that this Yield is associated with
Yield Name	The name of the Yield
Base Item	The Item that this Yield is taking into consideration
Unit	This is the Base Unit for the Base Item

Screen Element	Description
Waste Group	The difference between the weight of the Yield Items and the weight of the produced Ingredients will be booked to the selected Waste Group
Reference	Enter any information pertaining to the Yield in this field
Date	The date the Yield is being done
Price	The price by Base Unit of the Base Item
Quantity	The amount of the Item being processed in the Yield
Waste Qty	The amount of the Base Item that will be booked as Waste
Save as List	Use this to save the current Yield as a List
Calculate	Use this whenever you would like the Total for the Yield to display at the bottom of the Detail grid and the Waste Qty to updated based on totals
Cancel	Cancels but does not delete the Yield

Information Bar



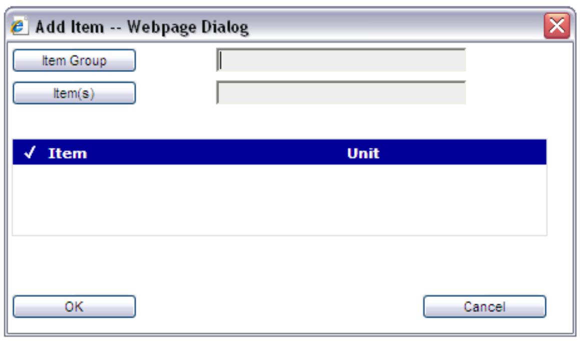
Menu Item	Description
Item	Displays the Item name
Unit	Displays the Unit of Measure
Conversion	Displays the conversion between the Unit of Base Item and the Unit of the Yielded Item
Ideal %	Displays the ideal percentage of Yield
Ideal Qty	Displays the ideal quantity of Yield
Act %	Displays the actual percentage of Yield
Act Qty	Displays the actual quantity of Yield
Var %	Displays the variance in percentage between the Ideal % and the Act % based on the quantity produced

Menu Item	Description
Used %	Displays the percentage of goods being produced by the Ingredients compared to the weight of the Yield Item
Waste %	Displays the percentage of the Yield Item that is being Wasted

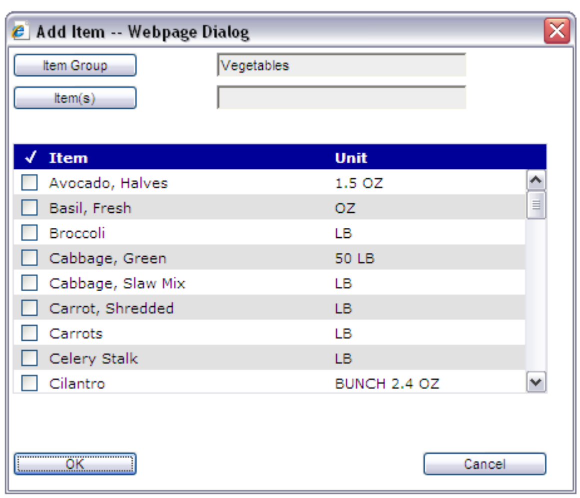
Add Items to a Yield

Before you can book the Yield, you must enter information into the Yield, specifically, Items considered as loss. To add Items to the Yield:

1. Open a Yield and click the Add Item(s) button; the Add Item window will appear:



2. Use the filters to select the Item Group and the Item(s) that will be included in the Yield:



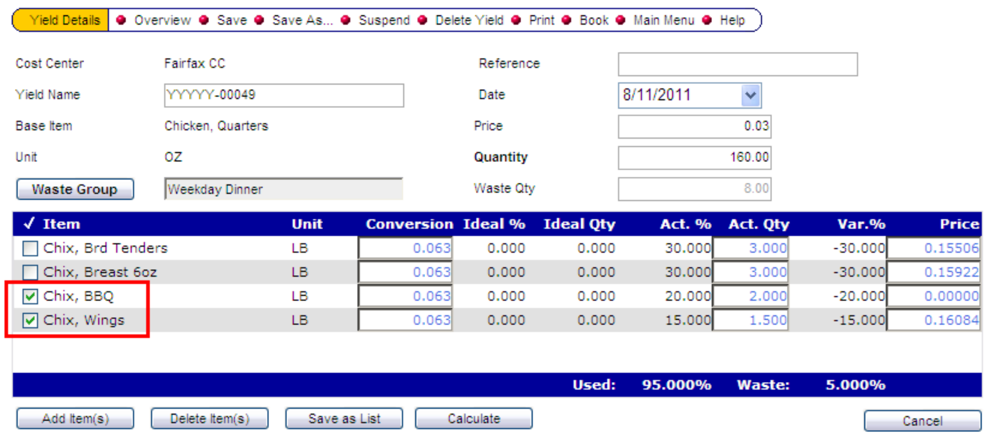
3. Click OK when all of the Items have been added to the Yield

The Items will be added to the Yield.

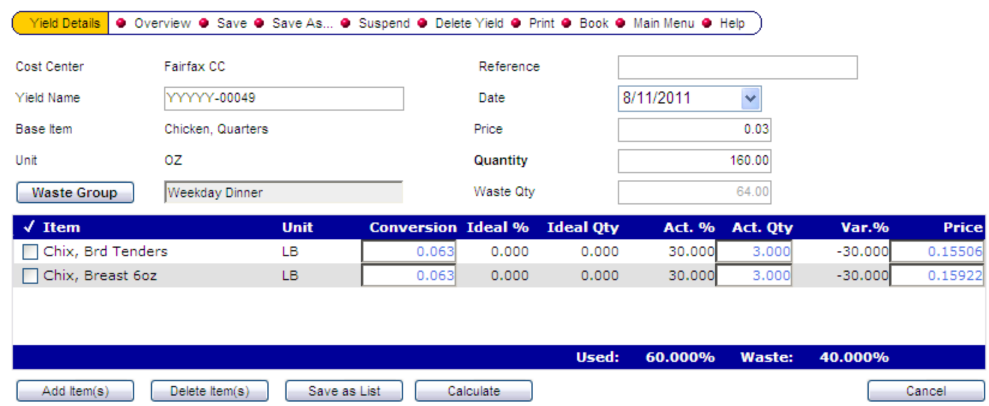
Delete Items from a Yield

To delete Items from a Yield:

1. Open a Yield with existing Items
2. Use the boxes to the left of the Items to select which Items will be deleted:



3. Click the Delete Item(s) button; a delete confirmation dialog box will appear
4. Click OK; the Items will be deleted from the Yield:



Save a Yield

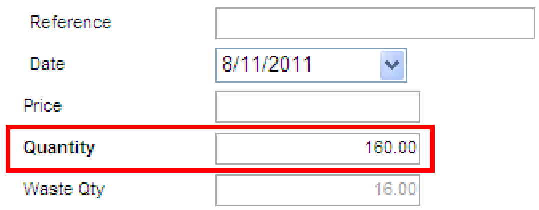
To save or suspend, please refer to the Saving & Suspending section of this document.

Note	*You **must** enter a quantity amount in the quantity field before a Yield can be saved.*

Book a Yield

After you have created a Yield and are ready to finalize it, you can book the Yield:

1. Open the Yield that will be booked
2. Enter a quantity in the Quantity field:



3. Click Book from the Top Menu Bar

Note *Once you book a Yield, you cannot UN-book it.*

4. Click OK in the next dialog box

Menu Item Linking

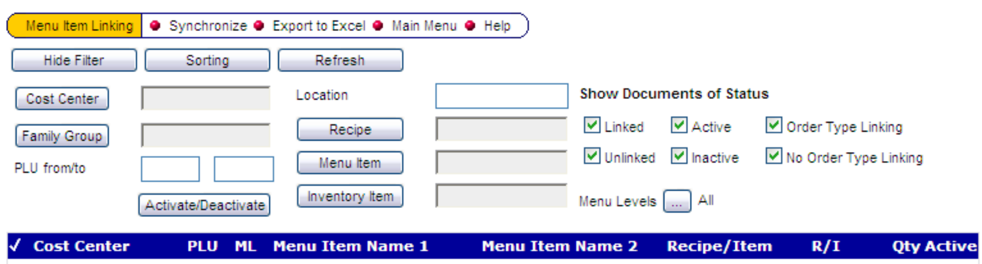
Menu Item Linking Introduction and Overview

The Menu Item Linking page is where you can link one menu item to multiple inventory Items or Recipes. This can be useful if an organization has a Recipe that is sold multiple ways or if menu items that use the same Recipe differently by menu level. Linking menu items is how myinventory accurately depletes the stock-on-hand levels of inventory Items.

For example, an organization sells French fries in three different sizes: small, medium, and large. The organization has created a recipe for French fries, but the recipe is only applicable for a small size. A medium fries is equal to 1.5 small fries and a large fries is equal to 2 small fries. By linking the Recipes and knowing the ratio, myinventory will be able to determine that when a large fries is sold, 2 portions of the small fries recipe must be depleted in order to account for the sale.

The Menu Item Linking Overview Window

The first page you will see after accessing the Menu Item Linking icon is the Overview window:



The following sections describe the Menu Item Linking screen elements

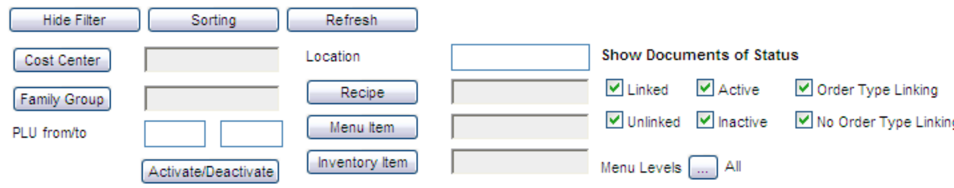
The Top Menu Bar

Menu Item	Description
Synchronize	Select this to copy Menu Item Linking from one Cost Center to another.
Export to Excel	Opens the current information into an Excel Spreadsheet
Main Menu	Return to the Main myinventory Menu.
Help	Launch the Help file.

Tips & Tricks

When all locations have the same items and PLUs, it is best to only do the linking for one location and copy that to the other locations. This can be a real time saver!

Additional Screen Elements/Filters



These filters behave as described in the Welcome section. For more information, please refer to the Screen Layout section of the Welcome page.

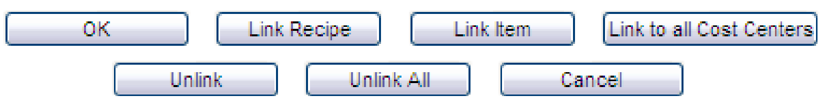
Screen Element	Description
Cost Center	Use this filter to search for Items belonging to a single Cost Center
Family Group	Use this filter if you would like to search by a particular Family Group; Family Groups are synced from the POS
PLU from/to	Use this filter to identify Price Look Up (Menu Item Number); this is the Menu Item Number synced from the POS
Activate/ Deactivate (sometimes Toggle)	This will cause an Item to become active/ inactive for linking – Item **does not** become inactive in the POS. If an Item is inactive, it will not deplete from inventory even if it sold at the POS
Location	Identifies the location for mymicros.net.
Recipe	Using this filter allows you to search for existing Recipes that have already been linked
Menu Item	Use this filter to search for specific menu items that have already been linked. For example, selecting “Fish” and clicking Run will produce all items that include the Menu Item Fish at the beginning of their name.
Inventory Item	Use this filter to search for a specific Inventory Item that has already been linked. Works similarly to Menu Item.

Screen Element	Description
Linked	Enable this option to see all Menu Items that are Linked
Unlinked	Enable this option to see all Menu Items that are not Linked
Active	Enable this option to see all Active Menu Items
Inactive	Enable this option to see all Menu Items that have been Deactivated
Order Type Linking	Enable this option to see all Menu Items using Order Type Linking
No Order Type Linking	Enable this option to see all Menu Items that do not use Order Type Linking
Menu Definition Levels	Click this button to select individual, multiple, or all menu levels for sorting purposes

Menu Item Linking Detail Window

From the Menu Item Linking Detail window, you can link Recipes and Items, or unlink previously linked Recipes/Items.

The following describes the Menu Item Linking Detail screen elements:

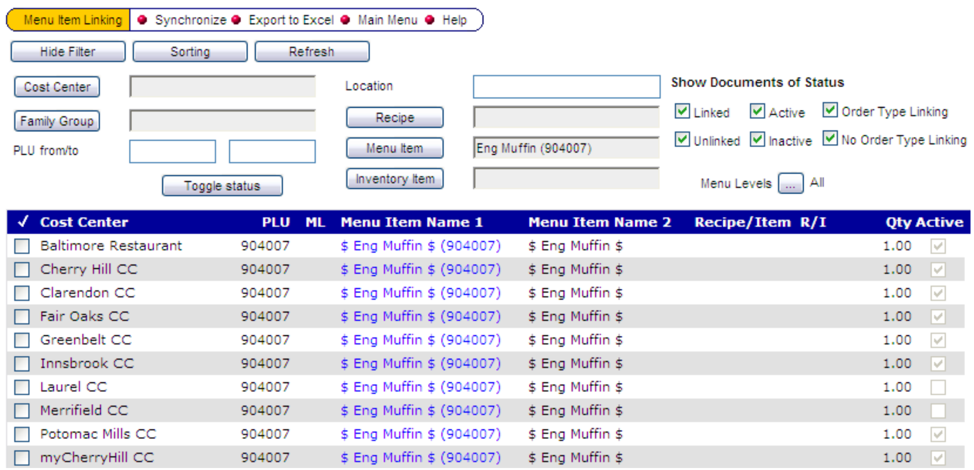


Menu Item	Description
OK	After selecting an Item/Recipe to link, this button will update and save the information, close the Menu Item Linking Detail window and refresh the Menu Item Linking Overview page
Link Recipe	Opens a pop-up window with a Recipe search field
Link Item	Opens a pop-up window with an Item search field
Link to all Cost Centers	Opens a pop-up window that allows you to copy the linking for the current Menu Item to other Cost Centers

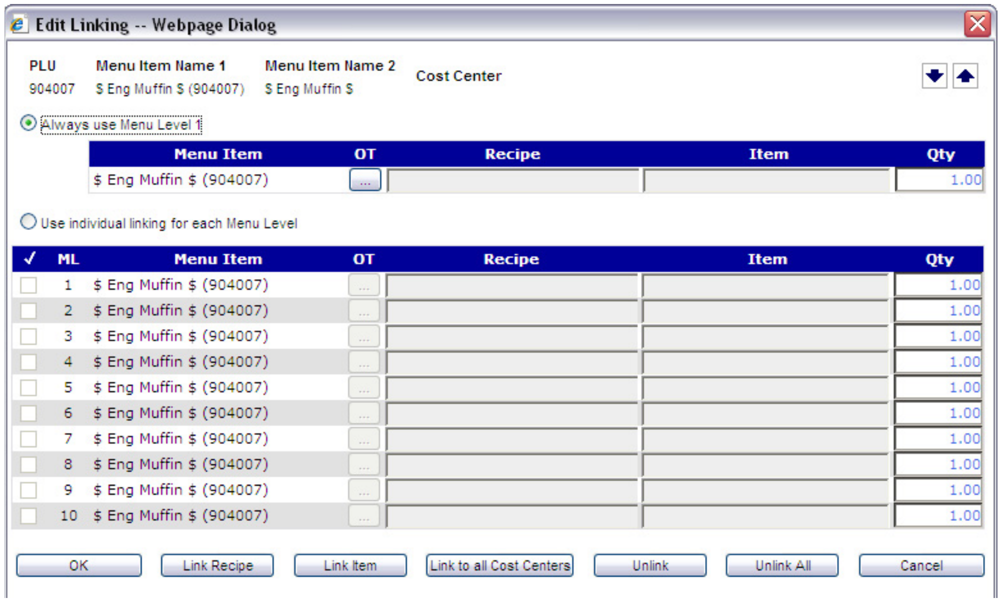
Menu Item	Description
Unlink	This will unlink a previously linked Item/ Recipe
Unlink All	This will unlink all previously linked Items/ Recipes
Cancel	This will exit the Menu Item Linking Detail window. Your changes will not be saved.

Link Items

1. After you have located the Menu Item you wish to link by using the filters, select it from the list by clicking on the Item hyperlink:

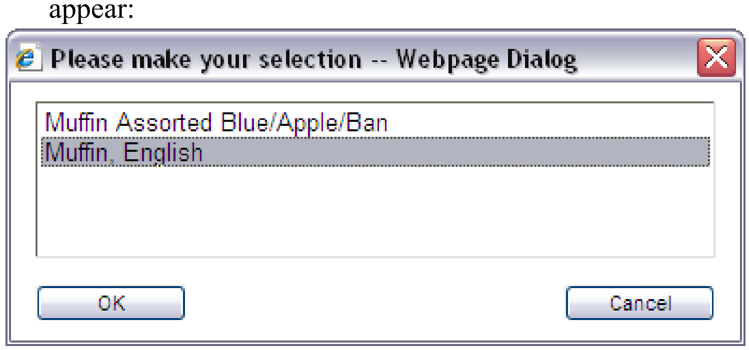


The Edit Linking dialog box will display; from this page, the Menu Item may be linked to up to 10 levels:



How your Recipes and Menu Levels are set up will determine how you link your Recipes. You will link your Menu Item to “Always use Menu Level 1” if the Recipe is the same for all Menu Levels.

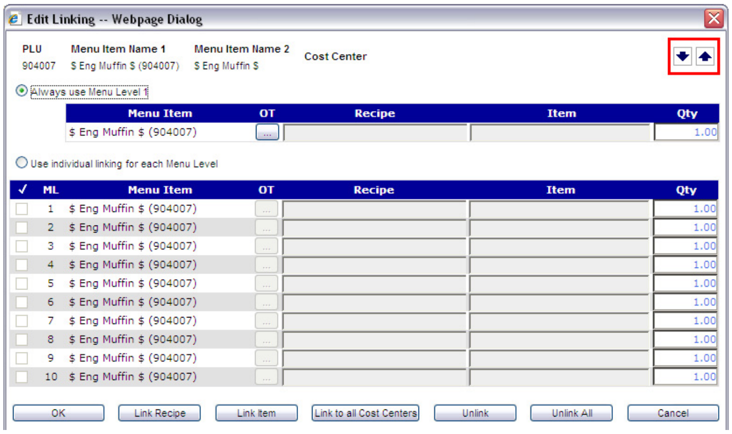
2. Click the Link Item button at the bottom of the page or place your cursor inside the Item column for the selected Menu Level and click Enter; a dialog box will appear:



3. Select the Item to which the Menu Item will be linked and click OK.
4. Modify the Quantity of the Item (if necessary) and click OK to Save your changes.

Now, in the case of the example, whenever an English Muffin is sold, the inventory is depleted by **1 Muffin, English**.

Note *You can use the arrow keys in the top right section of the screen to scroll up or down through the list, which will save time when Linking many Items or Recipes in one session. After Linking the Item/Recipe, instead of selecting OK to exit the window, click one of the arrows and you will be moved to the next Menu Item in the list. Once you have Linked your final Item, select OK and all of the Linking that you just completed will be updated in the module:*

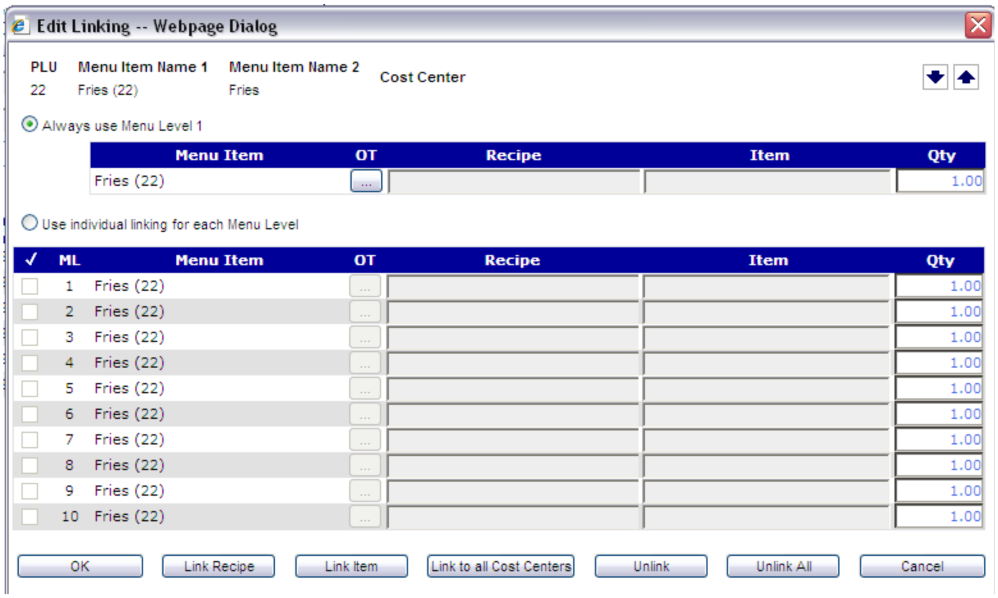


Link a Recipe

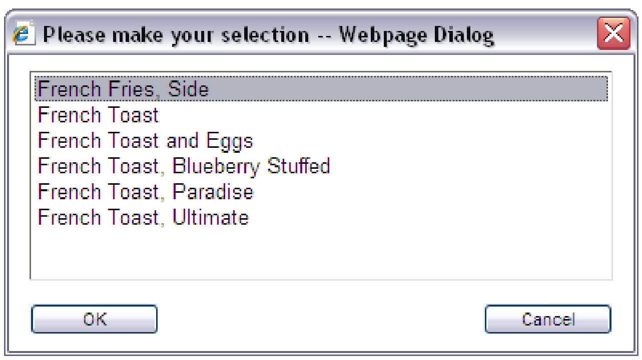
For the following example, we will be linking a French Fry Recipe to Menu Levels 1, 2, and 3, where 1 is a small size, 2 is a medium size, and 3 is a large size. A small is one portion of the Recipe, a medium is 1 1/2 portions, and a large is 2 portions.

After you have located the Menu Item you wish to link by using the filters, select it from the list:

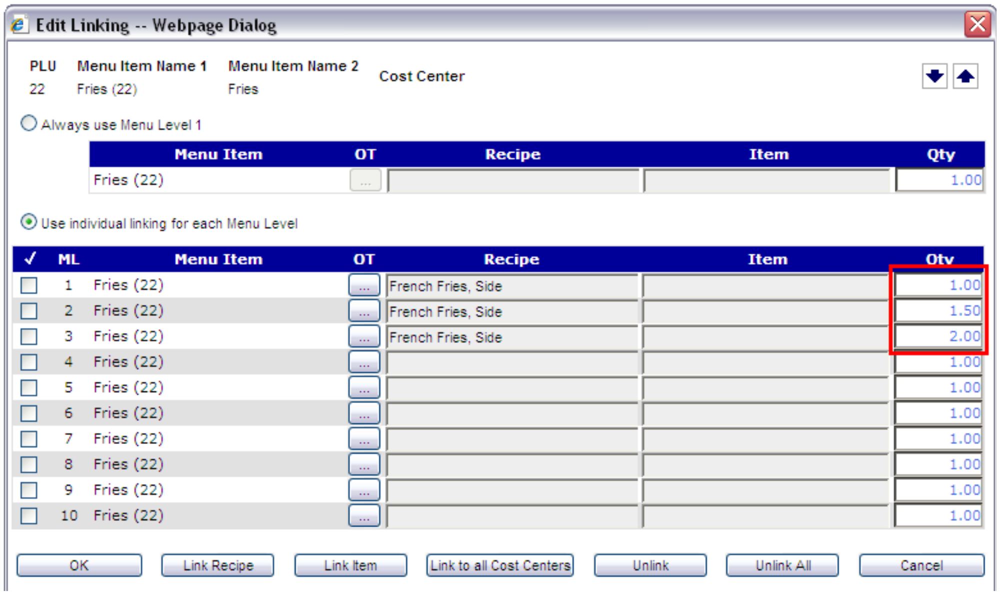
The Edit Linking dialog box will display; from this page a Menu Item may be linked to up to 10 levels:



1. Select Menu Levels 1, 2, and 3 and click Link Recipe
2. Locate French Fries and click OK



3. Enter 1.5 in the Quantity field for Level 2 and 2 in the Quantity field for Level 3



4. Click OK

Now, when Fries from Menu Level 1 is selected, the inventory will be depleted by 1 portion of French Fries. When Fries from Menu Level 2 is selected, the inventory will be depleted by 1.5 portions of the French Fry recipe. When Fries from Menu Level 3 is selected, the inventory will be depleted by 2 portions of French Fries.

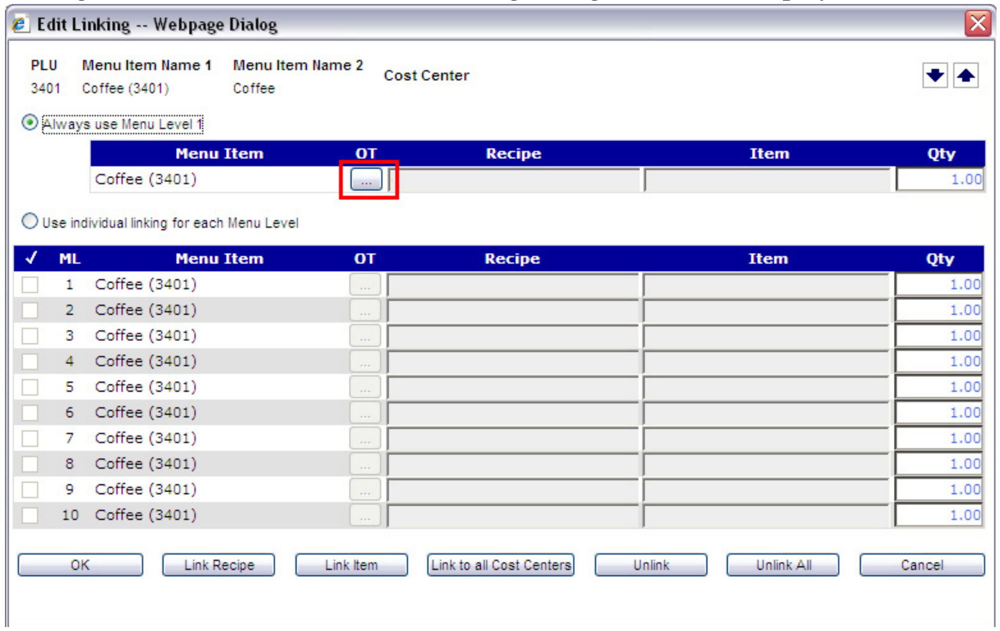
Tips & Tricks

Although it is useful to link using quantities sometimes, Users need to ensure that if changes are made to the Recipe that the linking with quantities is still valid.

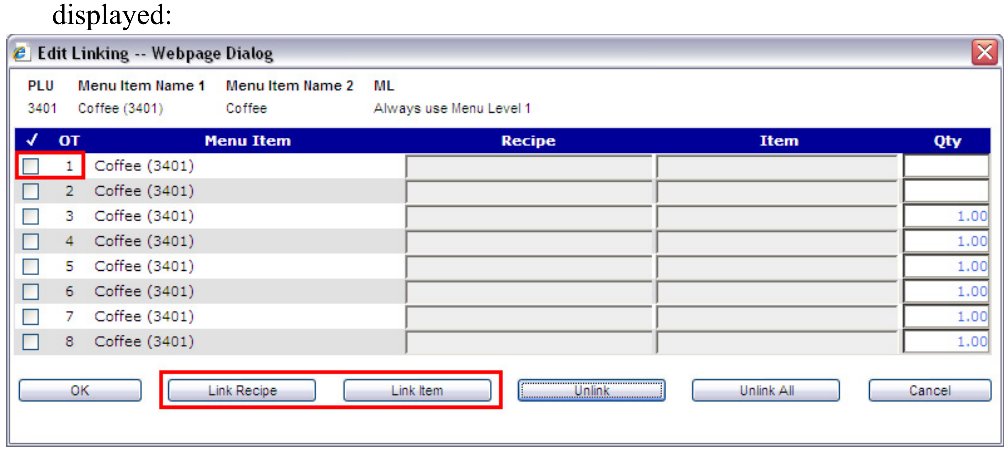
Link by Order Type

myinventory has the ability to deplete Items and Recipes based on the Order Type information sent from the POS. This would be used in organizations that implement different product preparation that is dependent on Order Type. An example would be a coffee shop that sells coffee To Go in a paper cup and coffee In House in a porcelain mug. The Recipe for the coffee To Go would include a paper cup and lid, but the coffee In House would not.

To link by Order Type, select the Menu Item to be linked from the Menu Item Linking overview window. The Edit Linking dialog box will be displayed:

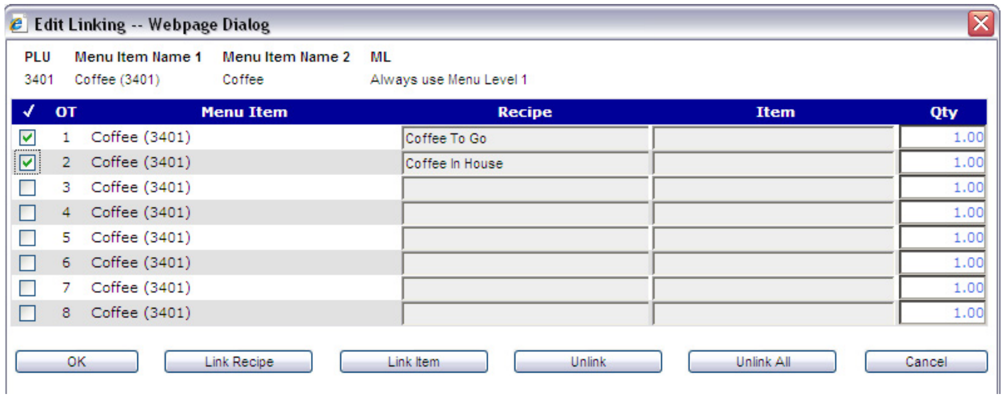


1. Select the button in the OT column; the Order Type Linking dialog box will be displayed:

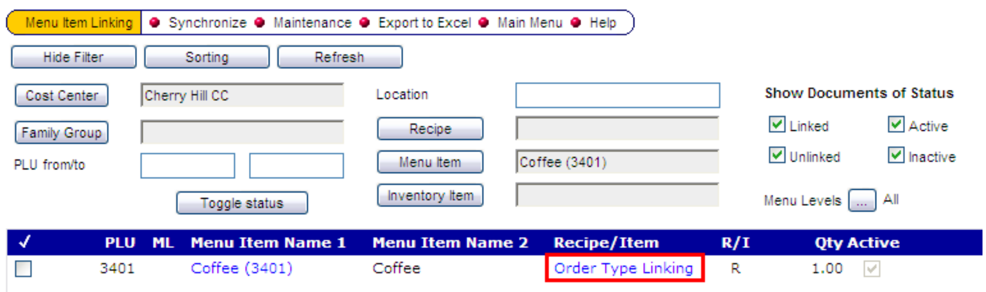


2. From here, the Menu Item may be linked to up to 8 different Order Types. Select an Order Type number by checking the box on the left and select Link Recipe or Link Item.
3. The Link Recipe/Item box will be displayed. Make your selection in the field and click OK.

4. Assign another Recipe/Item to a different Order Type:



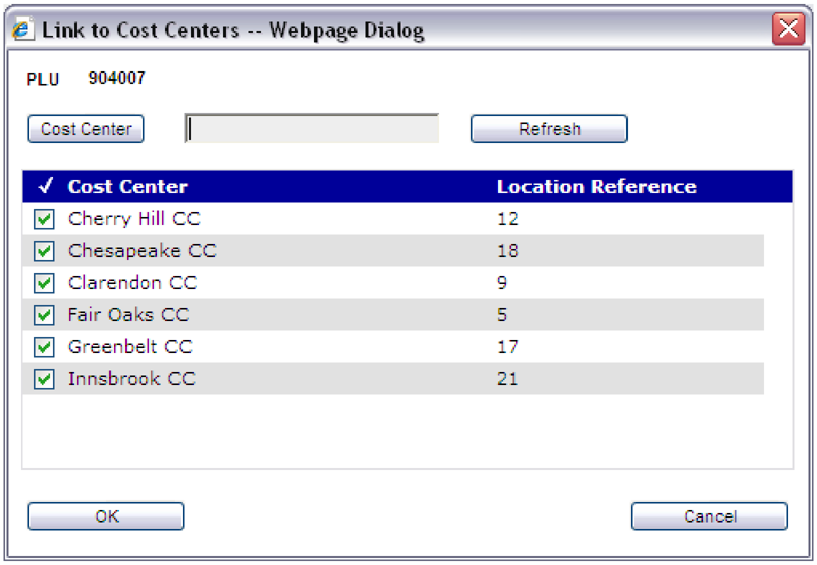
5. Select OK to close this window when finished and OK again to close the Edit Linking window.
6. In the Menu Item Linking overview, the Recipe/Item column that indicates what the Menu Item is linked to will contain a hyper link that reads Order Type Linking:



7. When you click this link, you will be able to view how this Menu Item is linked

Link to All Cost Centers

1. After linking Menu Items, from the Edit Linking window, click the Link to all Cost Centers key; a dialog box will appear:



   a. All locations will be selected – deselect any Cost Centers where you do not want the Menu Item to be linked
   b. Click OK

Unlink/Unlink All

1. From the Edit Linking page, select the Menu Item(s) to be unlinked from their Recipes/Items
2. Click Unlink

Note — *If you are unlinking **all Items**, do not select any Menu Items and simply click the Unlink All button and select OK from the confirmation box.*

Booking Sales Module

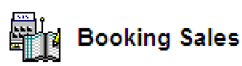
Introduction & Overview

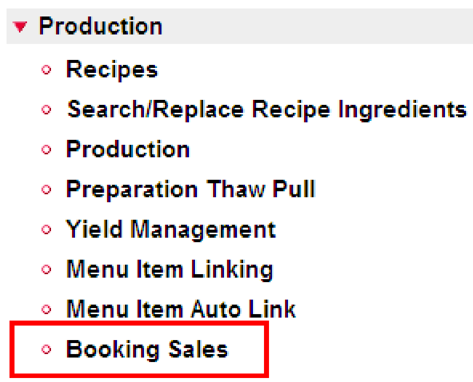
The Booking Sales module allows you to access and view Menu Items that were not booked in sales. This situation may occur, for one reason or another, and it is important that Users have access to this information in order to monitor the Items and Inventory coming in to the location(s).

From the Booking Sales module, you will also be able to assign the appropriate POS system for your organization.

Accessing the myinventory Booking Sales Module

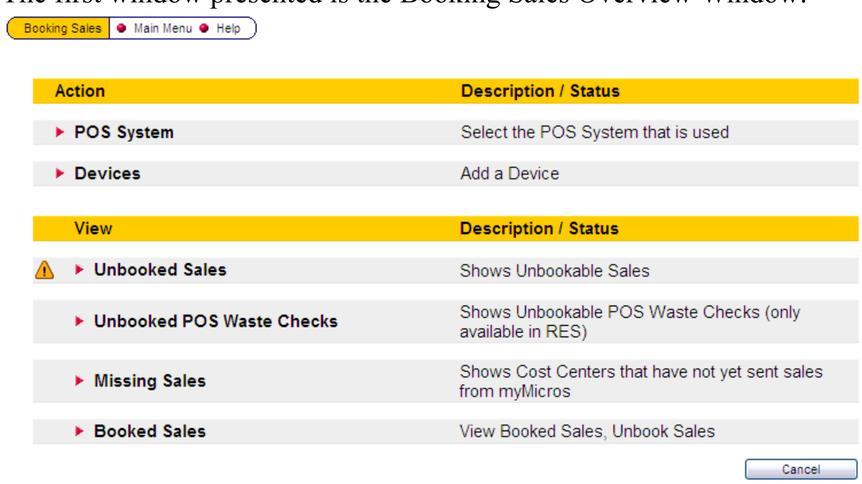
Click the Booking Sales icon from the Maintenance Menu or select the option from below the Production Menu:





Booking Sales Overview Window

The first window presented is the Booking Sales Overview Window:

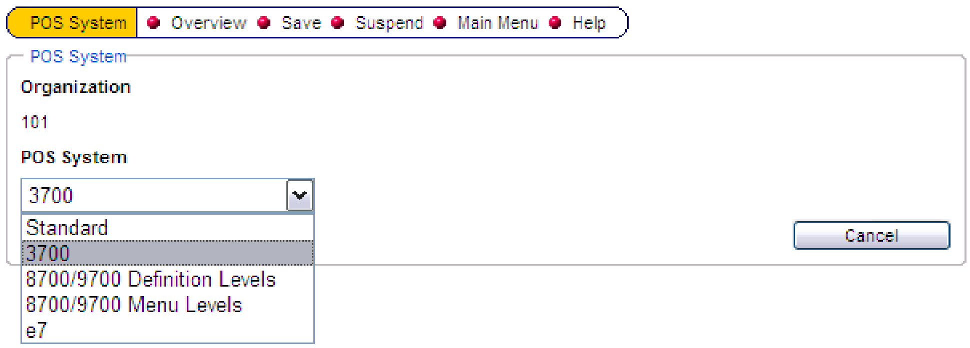


From this window, you can assign a POS System, view and add new Devices, view unbooked Sales and POS Waste Checks, and view missing and booked Sales.

Select/Assign a POS System

Follow the steps below to assign the correct POS System to your organization.

1. From the Booking Sales Overview Window, click POS System
2. Specify the POS System from the options available in the drop-down list:



3. Save

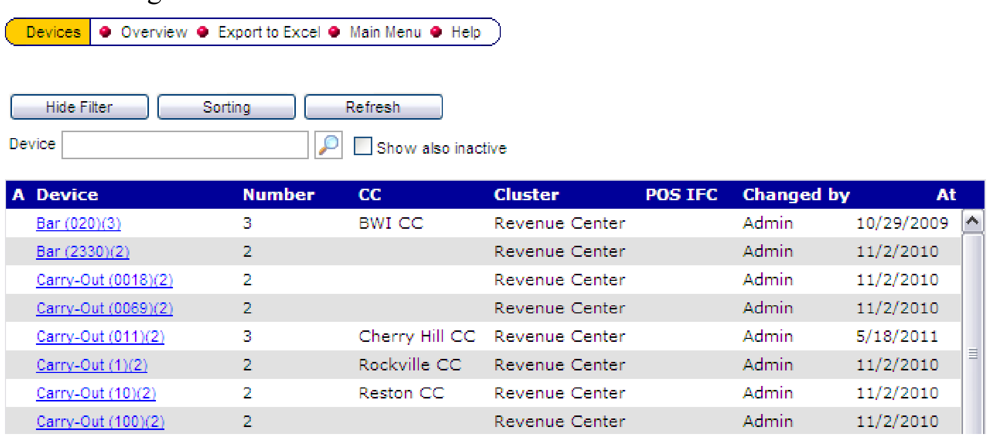
Note	*Assigning POS Systems should only be maintained by MICROS.*

Devices

Devices are synced from mymicros.net. In most cases, Devices reflect an organization's POS systems.

Devices Overview Window

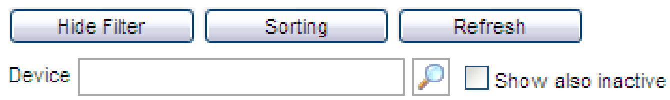
The following describes the Devices Overview window:



Top Menu Bar

Menu Item	Description
Overview	Go to the subject area overview
Export to Excel	Opens the current information in an Excel spreadsheet
Main Menu	Return to the Main myinventory Menu
Help	Launch the Help file

Additional Screen Elements



These filters behave as described in the Welcome section. For more information, please refer to the Screen Layout section of the Welcome page.

Information Bar

Menu Item	Description
Device	Displays the Device name
Number	
CC	Displays the Cost Center that the Device belongs to
Cluster	
POS IFC	
Changed by	Displays the last User to make a change to the Device
At	Displays the date the last change was made

Devices Detail Window

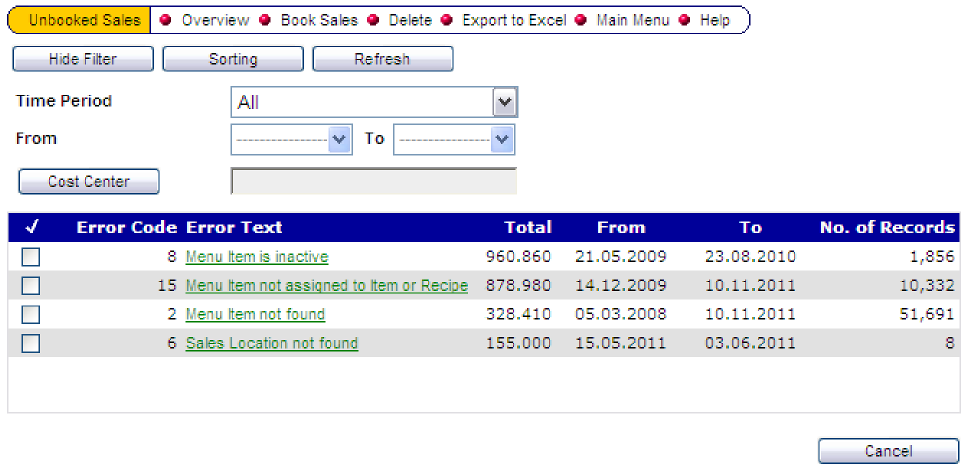
Configuration pertaining to Devices should only be executed by MICROS. Any incorrect changes made here can harm the system. Do not attempt to make adjustments in this module.

Unbooked Sales

Unbooked Sales shows detailed information on sales that were not booked and are currently classified as “Unbooked”.

Unbooked Sales Detail Window

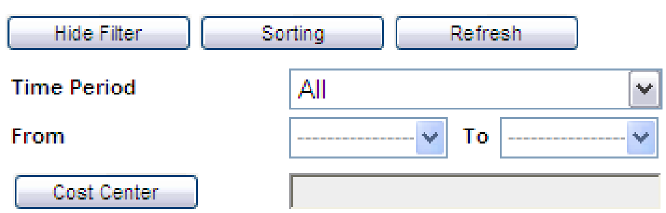
The following describes the Unbooked Sales Detail window.



Top Menu Bar

Menu Item	Description
Overview	Go to the subject area overview
Book Sales	Click this option to book a suspended/unbooked sale
Delete	This will delete the selected unbooked sales
Export to Excel	Opens the current information in an Excel spreadsheet
Main Menu	Return to the Main myinventory Menu
Help	Launch the Help file

Additional Screen Elements



These filters behave as described in the Welcome section. For more information, please refer to the Screen Layout section of the Welcome page.

Information Bar

Menu Item	Description
Error Code	Displays the Error Code number – the Error Code number can be correlated back to a reason/explanation as to why the sales order did not book
Error Text	Displays the Error message that corresponds with the Error Code number
Total	Displays the total monetary amount excluded from booked sales
From	Displays the from/start date
To	Displays the to/end date
No. of Records	Shows the number of records affected by the unbooked sales

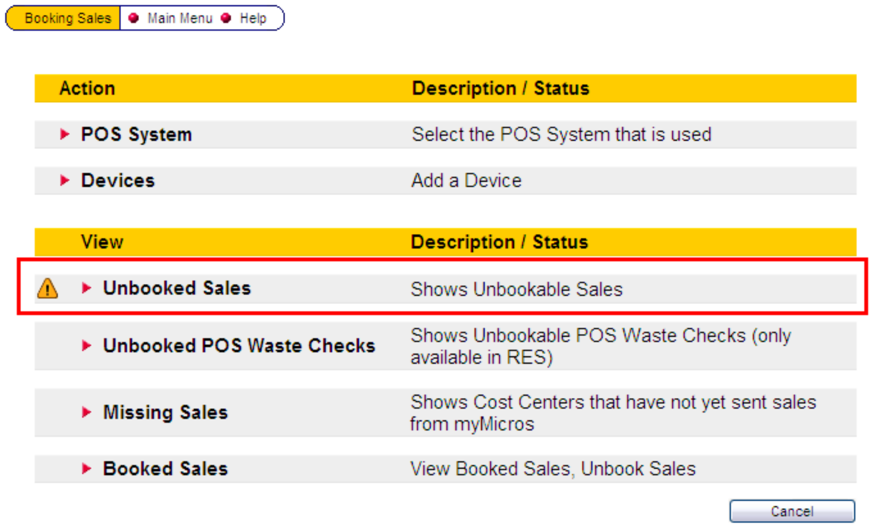
Book Unbooked Sales

There are four errors that can occur to result in unbooked sales. This document describes each one and the steps necessary to book the sales so that inventory depletion occurs.

Error Code 2 - Menu Item not found

This error results when mymicros.net has not synced Master Data for the Menu Item yet. After End of Day runs and information is sent from mymicros.net to myinventory, these sales may be booked manually as described below. If the sales remain in the buffer into the following day, however, contact MICROS Support to have the issue resolved.

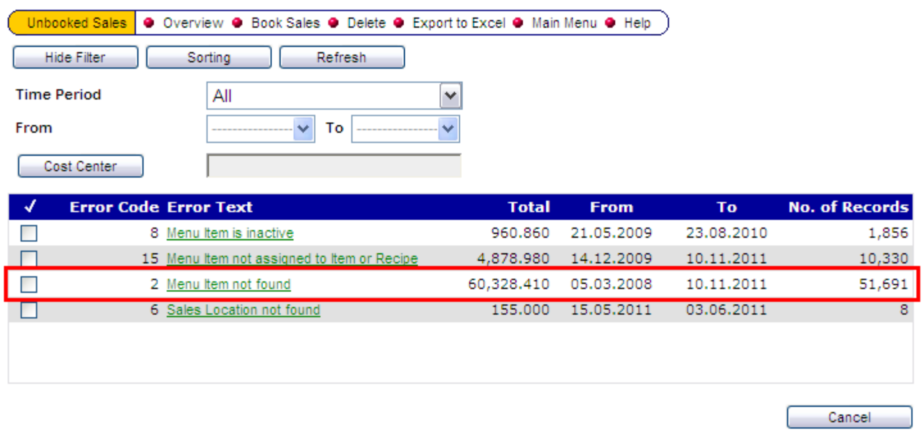
1. Select Unbooked Sales from the Booking Sales Overview window:



Action	Description / Status
POS System	Select the POS System that is used
Devices	Add a Device

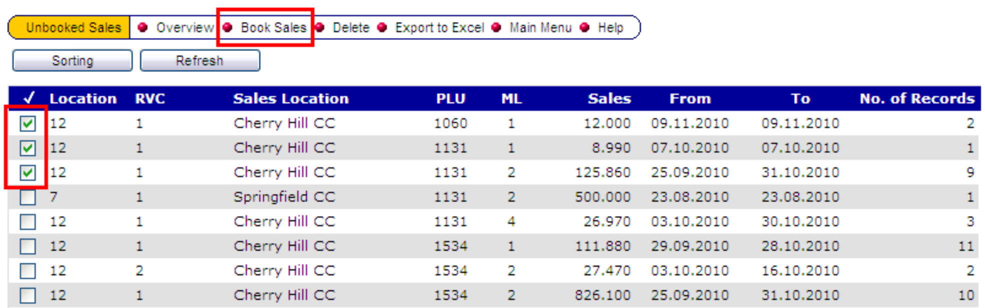
View	Description / Status
Unbooked Sales	Shows Unbookable Sales
Unbooked POS Waste Checks	Shows Unbookable POS Waste Checks (only available in RES)
Missing Sales	Shows Cost Centers that have not yet sent sales from myMicros
Booked Sales	View Booked Sales, Unbook Sales

2. Select the Menu Item not found hyperlink:



✓	Error Code	Error Text	Total	From	To	No. of Records
☐	8	Menu Item is inactive	960.860	21.05.2009	23.08.2010	1,856
☐	15	Menu Item not assigned to Item or Recipe	4,878.980	14.12.2009	10.11.2011	10,330
☐	2	Menu Item not found	60,328.410	05.03.2008	10.11.2011	51,691
☐	6	Sales Location not found	155.000	15.05.2011	03.06.2011	8

3. Select which sales to book by marking the check box, where applicable
4. Click Book Sales from the Top Menu Bar:



✓	Location	RVC	Sales Location	PLU	ML	Sales	From	To	No. of Records
☑	12	1	Cherry Hill CC	1060	1	12.000	09.11.2010	09.11.2010	2
☑	12	1	Cherry Hill CC	1131	1	8.990	07.10.2010	07.10.2010	1
☑	12	1	Cherry Hill CC	1131	2	125.860	25.09.2010	31.10.2010	9
☐	7	1	Springfield CC	1131	2	500.000	23.08.2010	23.08.2010	1
☐	12	1	Cherry Hill CC	1131	4	26.970	03.10.2010	30.10.2010	3
☐	12	1	Cherry Hill CC	1534	1	111.880	29.09.2010	28.10.2010	11
☐	12	2	Cherry Hill CC	1534	2	27.470	03.10.2010	16.10.2010	2
☐	12	1	Cherry Hill CC	1534	2	826.100	25.09.2010	31.10.2010	10

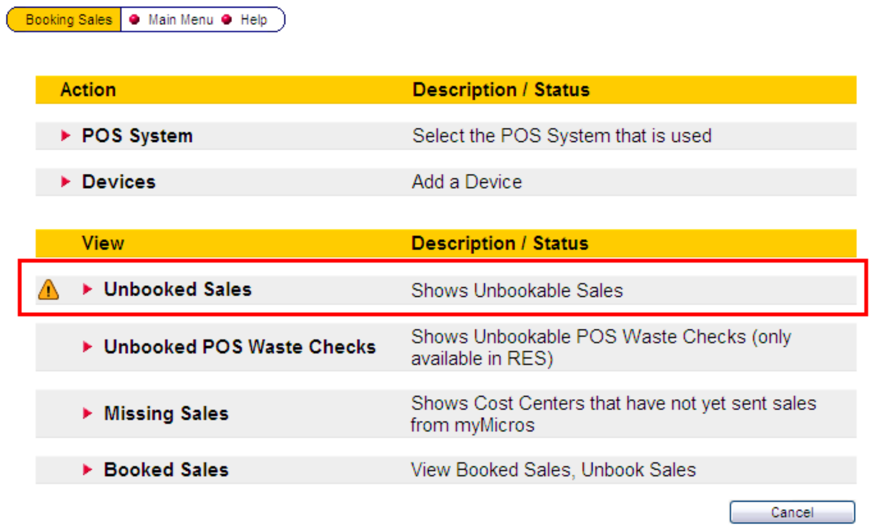
5. Click OK from the confirmation dialog box

The unbooked sales will now be booked.

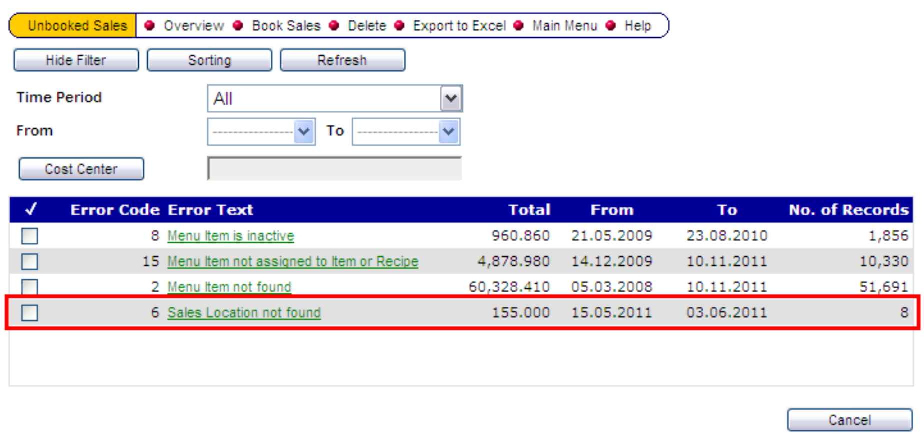
Error Code 6 - Sales Location not found

This error will occur if sales are sent for a Revenue Center that is not linked to a Cost Center. Before these sales may be booked, the Revenue Center must be linked to a Cost Center in the Devices module. Contact MICROS Support for assistance with this step before moving on to book the sales.

1. Select Unbooked Sales from the Booking Sales Overview window:

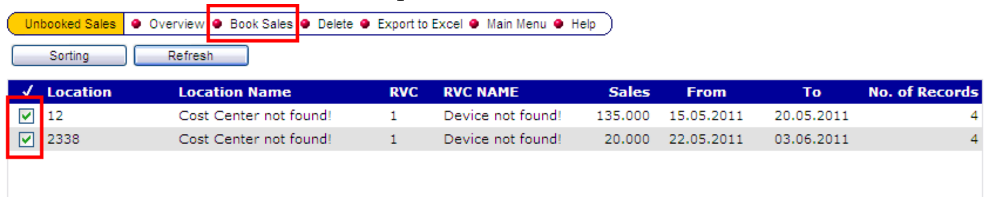


2. Select the Sales Location not found hyperlink:



3. Select which sales to book by marking the check box, where applicable

4. Click Book Sales from the Top Menu Bar:



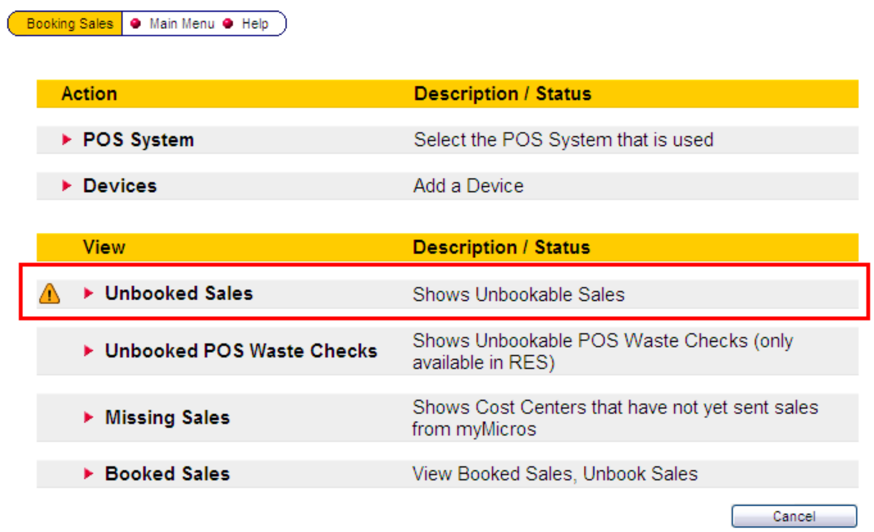
5. Click OK from the confirmation dialog box

The unbooked sales will now be booked.

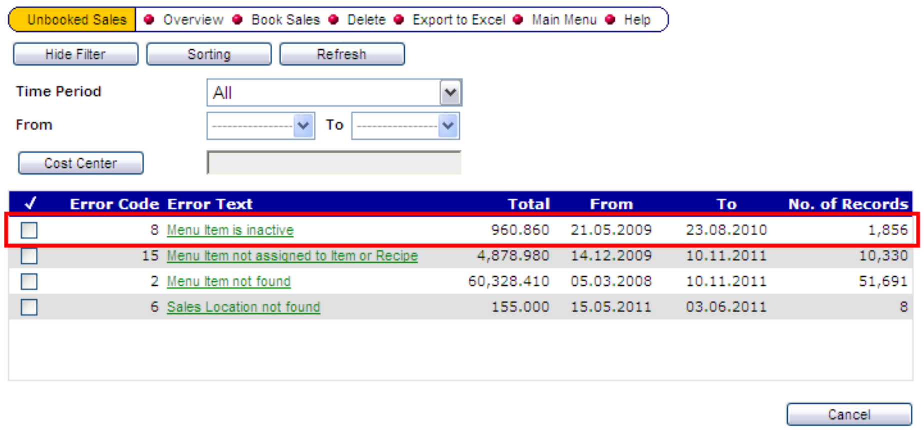
Error Code 8 - Menu Item is inactive

Menu Items that are deactivated in Menu Item Linking but then incur sales will be stored in the Unbooked Sales buffer. To book the sales for these Items, they must be activated. Once activated, the sales will be booked automatically. To activate an inactive Menu Item:

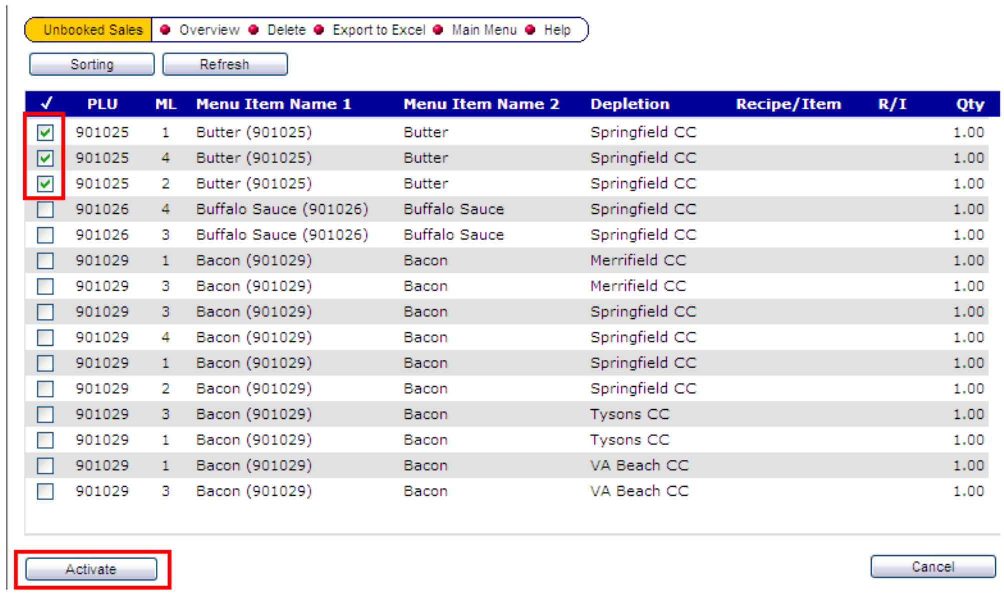
1. Select Unbooked Sales from the Booking Sales Overview window:



2. Select the Menu Item is inactive hyperlink:



3. Select the Menu Items to activate and select Activate:



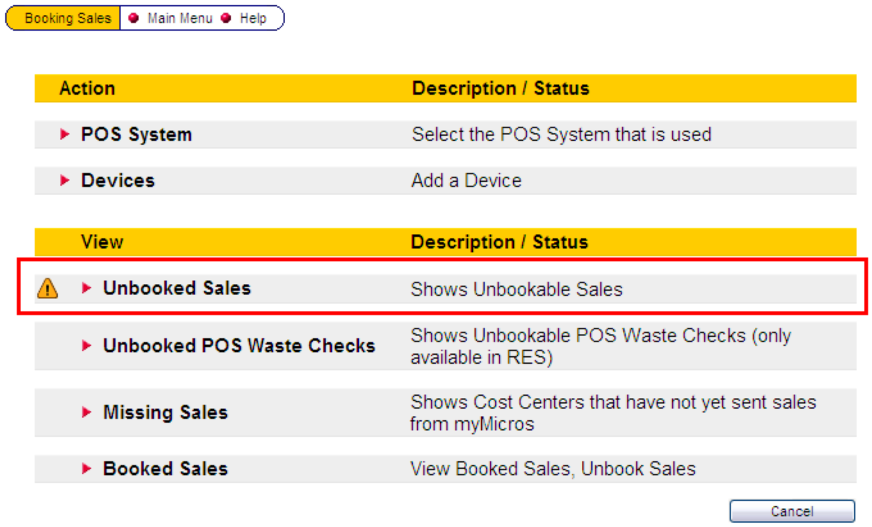
4. Click OK from the confirmation dialog box

The Menu Items are now active and their sales will be booked.

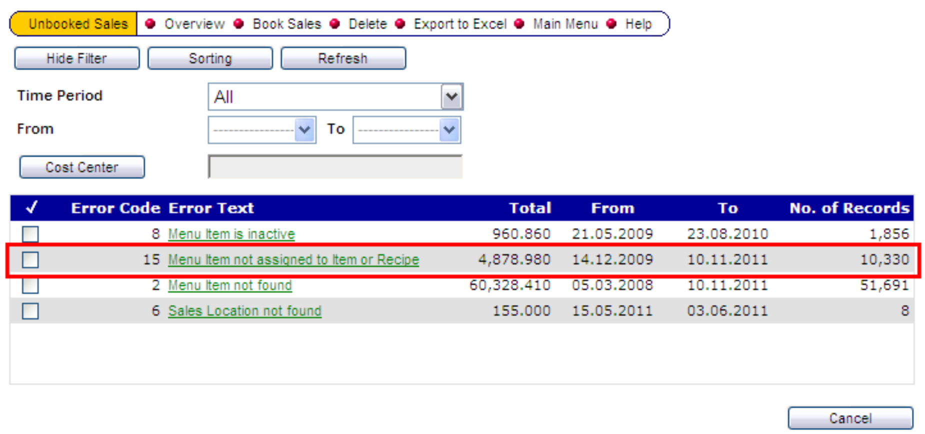
Error Code 15 - Menu Item not assigned to Item or Recipe

Menu Items that are not linked to an Item or a Recipe will remain in Unbooked Sales until they are linked and then the sales may be booked.

1. Select Unbooked Sales from the Booking Sales Overview window:

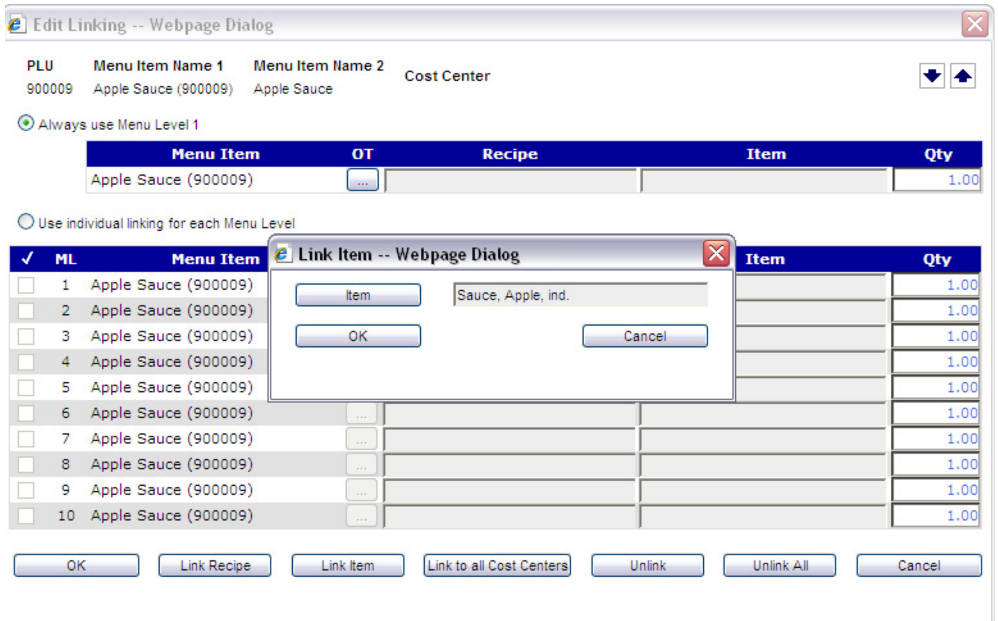


2. Select the Menu Item not assigned to Item or Recipe hyperlink:



3. From this window, you can link the Menu Items to an Item or Recipe by selecting the link for the Menu Item:

4. The Menu Item Linking window will be displayed. Link the Menu Item to its respective Item/Recipe and select OK.



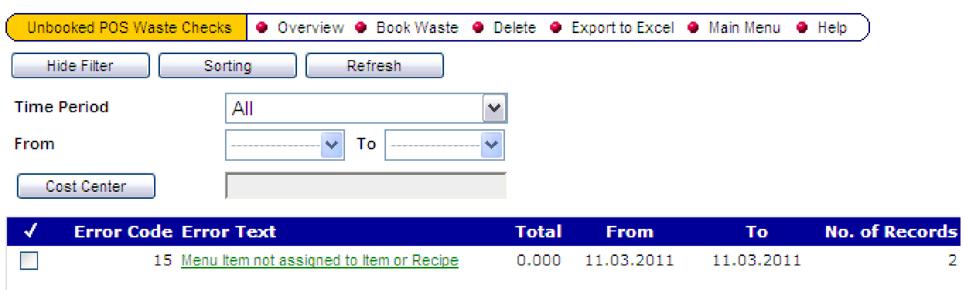
The Menu Item is now linked and sales booking will occur automatically.

Unbooked POS Waste Checks

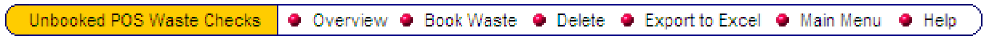
Unbooked Sales shows detailed information on sales that were not booked and are currently classified as “Unbooked”.

Unbooked POS Waste Checks Detail Window

The following describes the Unbooked POS Waste Checks Detail window:

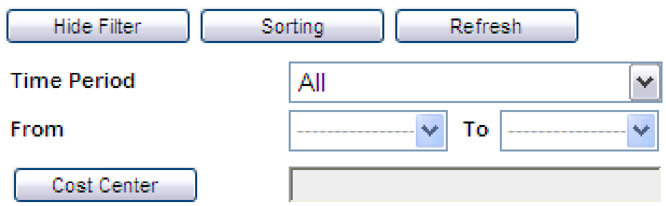


Top Menu Bar



Menu Item	Description
Overview	Go to the subject area overview
Book Waste	Select this to book a suspended/unbooked POS Waste Check
Delete	This option will delete the unbooked POS Waste Check
Export to Excel	Opens the current information in an Excel spreadsheet
Main Menu	Return to the Main myinventory Menu
Help	Launch the Help file

Additional Screen Elements



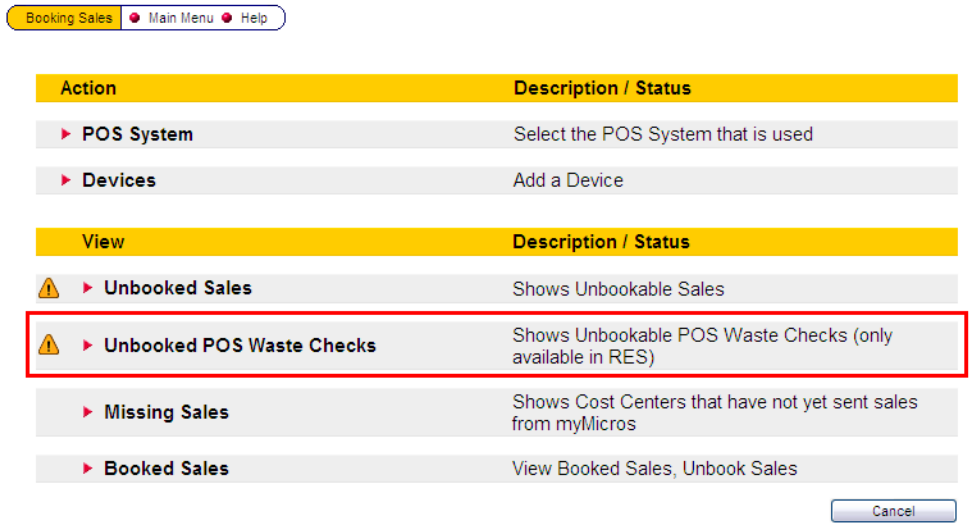
These filters behave as described in the Welcome section. For more information, please refer to the Screen Layout section of the Welcome page.

Information Bar

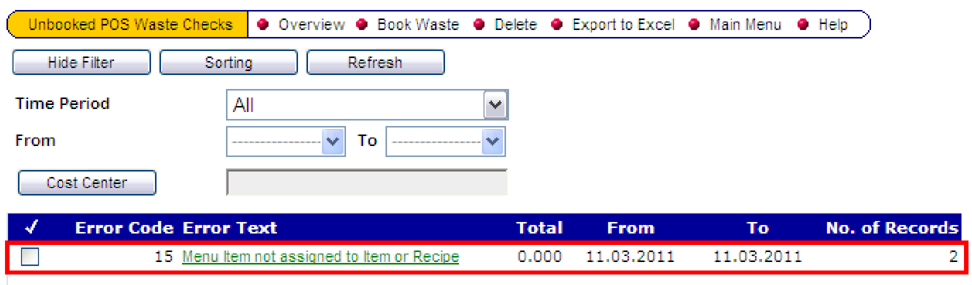
Menu Item	Description
Error Code	Displays the Error Code number – the Error Code number can be correlated back to a reason/explanation as to why the POS Waste Check did not book
Error Text	Displays the Error message that corresponds with the Error Code number
Total	Displays the total monetary amount excluded from booked Waste
From	Displays the from/start date
To	Displays the to/end date
No. of Records	Shows the number of records affected by the unbooked POS Waste Check

Book Unbooked POS Waste Checks

1. Select Unbooked POS Waste Checks from the Booking Sales Overview window:



2. Select an unbooked record:



3. Select which Waste Checks to book by marking the box, where applicable
4. Click Book Sales from the Top Menu Bar
5. Click OK from the confirmation dialog box

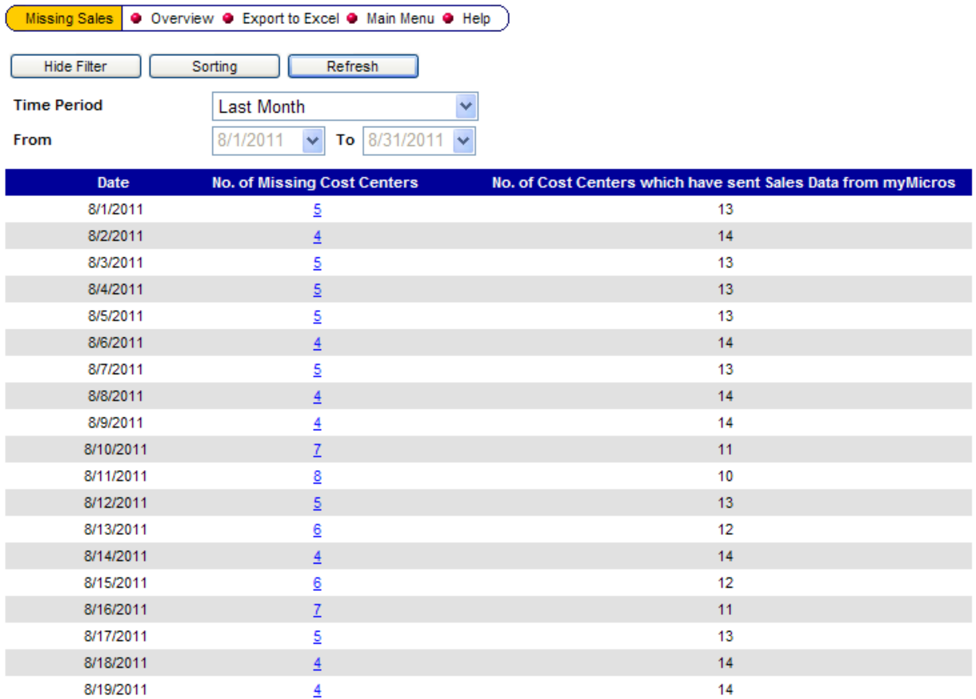
The Unbooked POS Waste Checks will now be booked.

Missing Sales

Missing Sales will display any Cost Center that did not post sales from mymicros.net for a particular date.

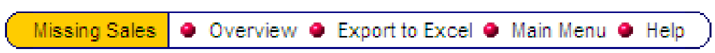
Missing Sales Detail Window

The following describes the Missing Sales Detail window:



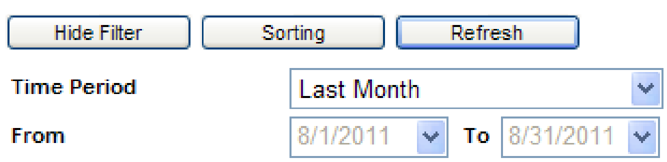
Date	No. of Missing Cost Centers	No. of Cost Centers which have sent Sales Data from myMicros
8/1/2011	5	13
8/2/2011	4	14
8/3/2011	5	13
8/4/2011	5	13
8/5/2011	5	13
8/6/2011	4	14
8/7/2011	5	13
8/8/2011	4	14
8/9/2011	4	14
8/10/2011	7	11
8/11/2011	8	10
8/12/2011	5	13
8/13/2011	6	12
8/14/2011	4	14
8/15/2011	6	12
8/16/2011	7	11
8/17/2011	5	13
8/18/2011	4	14
8/19/2011	4	14

Top Menu Bar



Menu Item	Description
Overview	Go to the subject area overview
Export to Excel	Opens the current information in an Excel spreadsheet
Main Menu	Return to the Main myinventory Menu
Help	Launch the Help file

Additional Screen Elements



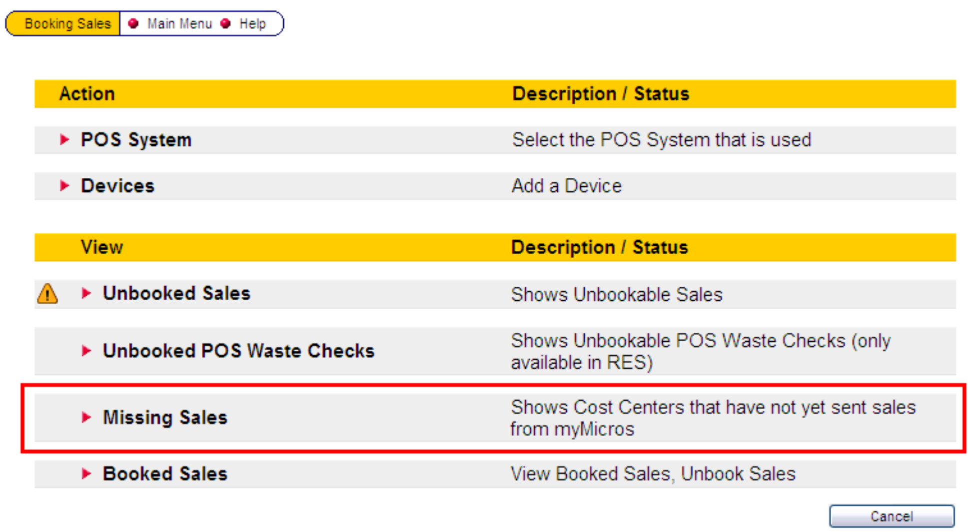
These filters behave as described in the Welcome section. For more information, please refer to the Screen Layout section of the Welcome page.

Information Bar

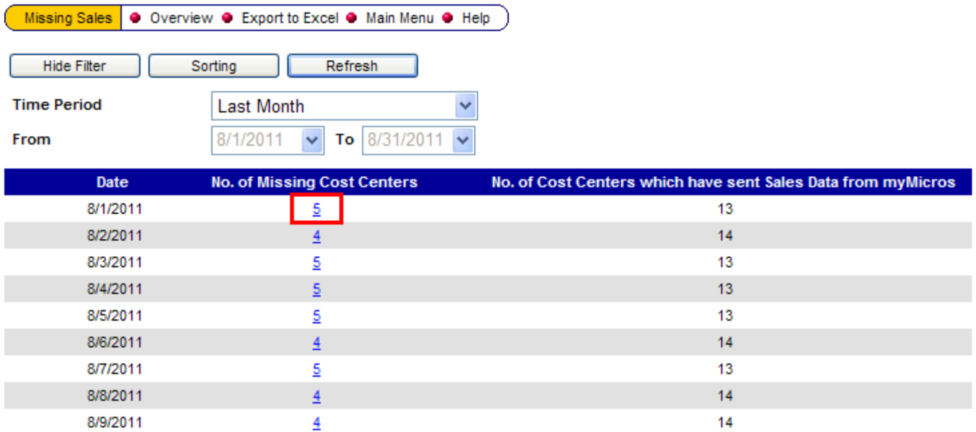
Menu Item	Description
Date	Displays the date of the sales
No. of Missing Cost Centers	Displays the number of Cost Centers that are missing sales for that date
No. of Cost Centers which have sent Sales Data from mymicros.net	Displays the number of Cost Centers that have sent sales for that date

View Cost Centers with Missing Sales

1. Select Missing Sales from the Booking Sales Overview window:



2. Select the record to view:



Date	No. of Missing Cost Centers	No. of Cost Centers which have sent Sales Data from myMicros
8/1/2011	5	13
8/2/2011	4	14
8/3/2011	5	13
8/4/2011	5	13
8/5/2011	5	13
8/6/2011	4	14
8/7/2011	5	13
8/8/2011	4	14
8/9/2011	4	14

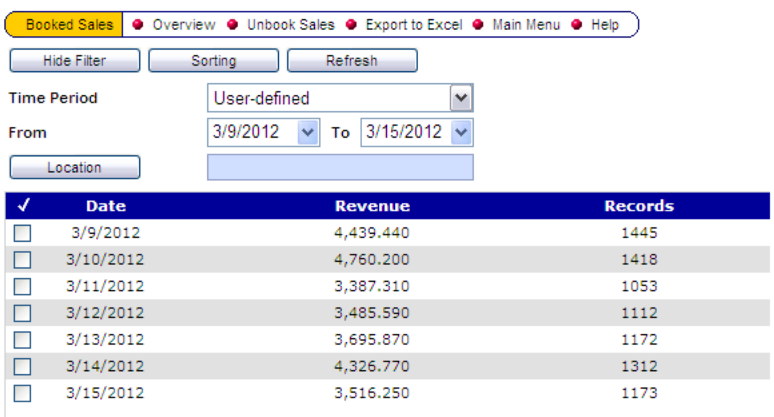
3. A new window will open, which displays the Cost Centers that are missing sales

Booked Sales

Booked Sales will display all Cost Centers that posted sales from mymicros.net for a particular date.

Booked Sales Detail Window

The following describes the Booked Sales Detail window:



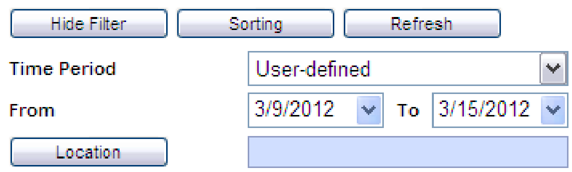
✓	Date	Revenue	Records
☐	3/9/2012	4,439.440	1445
☐	3/10/2012	4,760.200	1418
☐	3/11/2012	3,387.310	1053
☐	3/12/2012	3,485.590	1112
☐	3/13/2012	3,695.870	1172
☐	3/14/2012	4,326.770	1312
☐	3/15/2012	3,516.250	1173

Top Menu Bar

Menu Item	Description
Overview	Go to the subject area overview
Unbook Sales	This option will unbook the sales for a chosen day
Export to Excel	Opens the current information in an Excel spreadsheet

Menu Item	Description
Main Menu	Return to the Main myinventory Menu
Help	Launch the Help file

Additional Screen Elements



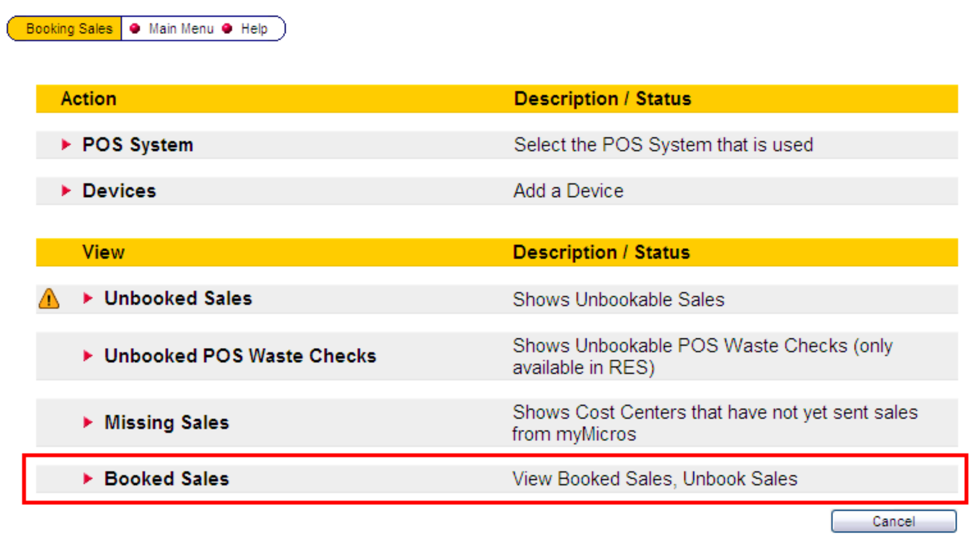
These filters behave as described in the Welcome section. For more information, please refer to the Screen Layout section of the Welcome page.

Information Bar

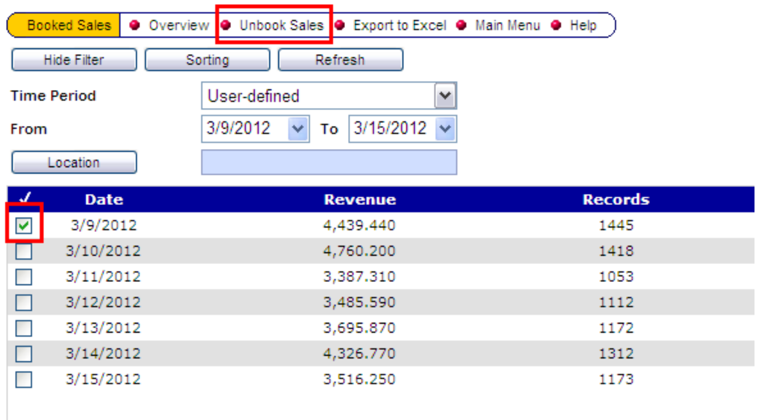
Menu Item	Description
Date	Displays the date of the sales
Revenue	Displays the total Revenue for that date
Records	Displays the number of sales records for that date

Unbook Sales

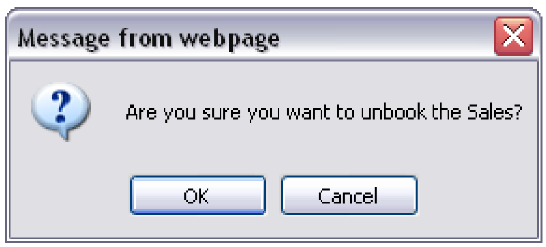
1. Select Booked Sales from the Booking Sales Overview window:



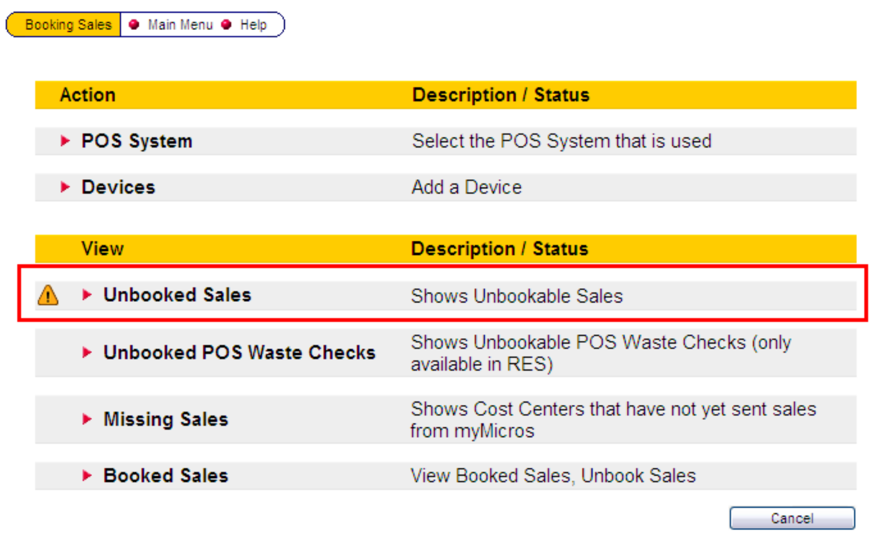
2. Select the record to unbook and click the Unbook Sales option from the Top Menu Bar:



3. Click OK to confirm the sales to be unbooked:



4. Return to the Booking Sales Overview window and select Unbooked Sales:



5. Locate the sales that you unbooked and select Book Sales from the Top Menu Bar. This resets the sales to zero for that day.

When unbooking sales, be sure that Recipes have not been adjusted between the date of the sales to be unbooked and the current date. This will cause a discrepancy in inventory depletion.

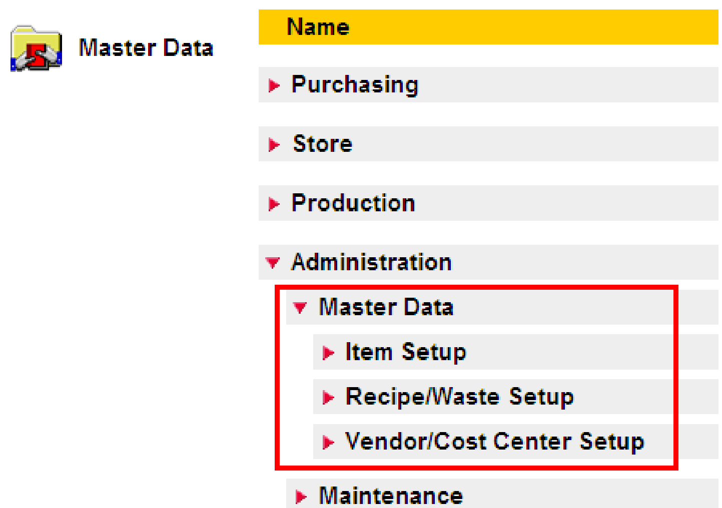
Master Data

Introduction and Overview

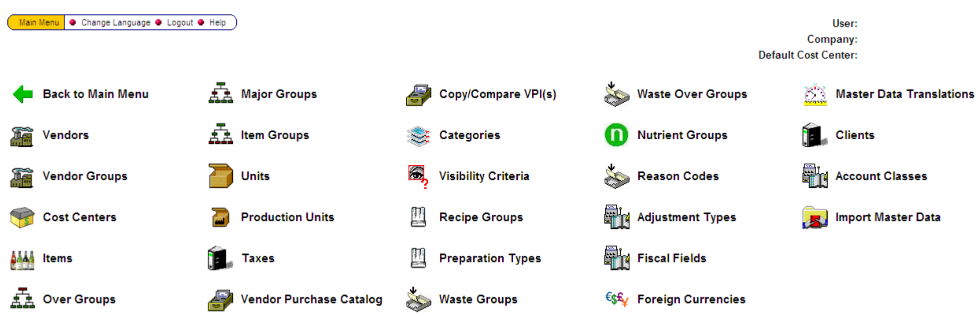
Master Data is where a User can set up all information regarding Vendors, Cost Centers, Waste, Items, etc. Master Data setup will enable the modules to share essential information with other areas of myinventory.

Accessing the Master Data Module

To access the Master Data module, click the Master Data icon from the Main Menu or select Master Data from below the Administration Tasks.



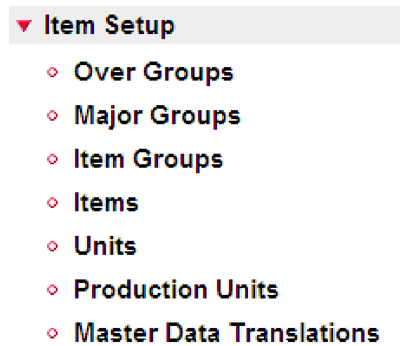
A sub-menu will appear. If you are using the Classic Menu View, your page will look similar to:



If you are using the Collapse Menu View, your will need to further specify what task you wish to perform. In the Collapse Menu View, tasks are categorized by: Item Setup, Recipe/Waste Setup, and Vendor/Cost Center Setup. Each category has sub-categories:

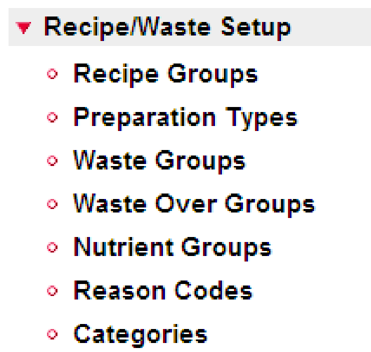
Item Setup

- Over Groups
- Major Groups
- Item Groups
- Items
- Units
- Production Units
- Master Data Translations



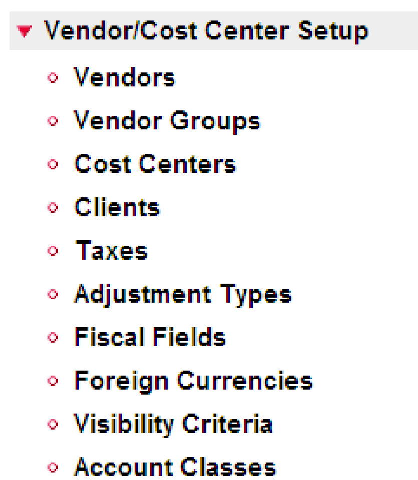
Recipe Setup

- Recipe Groups
- Preparation Types
- Waste Groups
- Waste Over Groups
- Nutrient Groups
- Reason Codes
- Categories



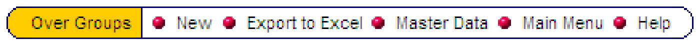
Vendor/Cost Center Setup

- Vendors
- Vendor Groups
- Cost Centers
- Clients
- Taxes
- Adjustment Types
- Fiscal Fields
- Foreign Currencies
- Visibility Criteria
- Account Classes

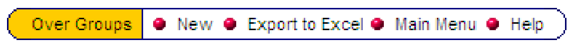


For the sake of this document, we will examine the items in the Master Data module according to the organization provided in the Collapse Menu View. We will begin with Item Setup, then Recipe/Waste Setup, and then Vendor/Cost Center Setup.

Note — *In the Master Data module, the Top Menu Bar might be different depending upon which Menu View you have selected. If you are using the Classic Menu, then every Top Menu Bar will have an option for returning to the Master Data icon-format menu:*



If you are using the Collapse Menu View, then you will not have the option of returning to the Master Data icon-format Menu since it does not exist in this View:



This functionality will appear in every sub-task of the Master Data module.

Audit Trail

In many of the modules within Master Data, you will see an Audit Trail button. The Audit Trail feature was added to myinventory to provide organizations with additional integrity checks for sensitive modules. When the option Enable Audit Trail is enabled in Maintenance | Settings | General tab, the Audit Trail feature will be available in myinventory. This feature tracks changes that are made to Items, Vendors, Units, etc., including the date, version number, reason and User. When the Audit Trail button is selected in a module, a window will open that displays the history of the Item, Vendor, etc., in chronological order. Each change that is listed will have a time stamp hyperlink. When the hyperlink is selected, a snap shot of the change will be opened in a new window, providing a comparison of what is different between the old and the new version.

Over Groups

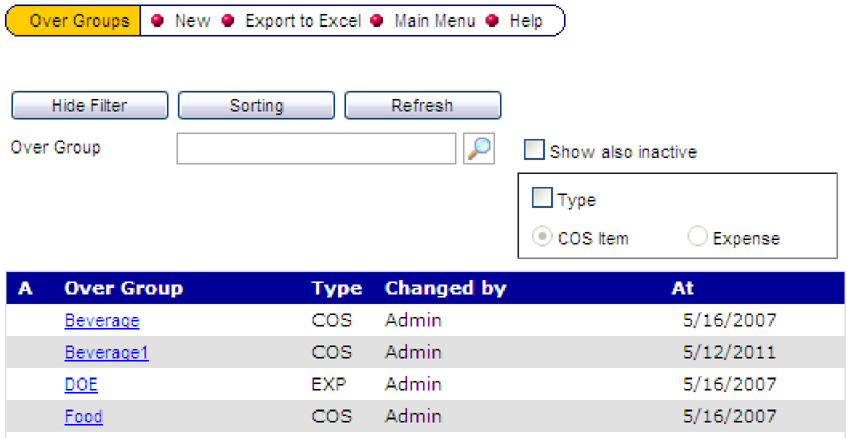
Tips & Tricks

The initial setup for Over Groups, Major Groups, Item Groups, Items, and Vendors is easier if carried out through the spreadsheet.

*However, if the spreadsheet method is used, all Over Groups, Major Groups, Item Groups, Items and Vendors **must** be entered using that method – it is an "all or nothing" procedure.*

Over Groups Overview Window

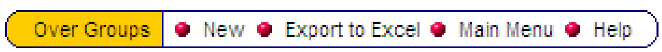
The first page you see after accessing the Over Groups module is the Over Groups Overview window. To see available Over Groups, you must click Refresh first.



From this window, you can review all existing Over Groups.

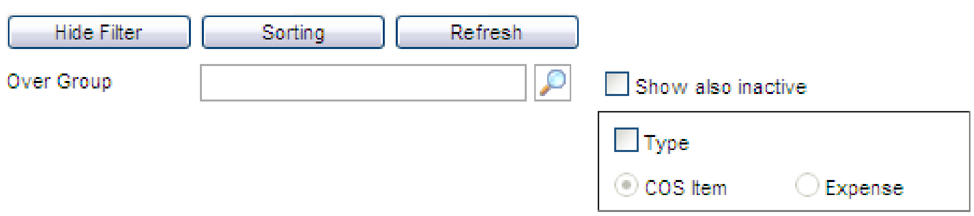
The following section describes the elements contained in the Over Groups Overview window.

Top Menu Bar



Menu Item	Description
New	Create a new Over Group
Export to Excel	Opens the current information into an Excel spreadsheet
Main Menu	Return to the Main myinventory Menu
Help	Launch the Help file

Additional Screen Elements

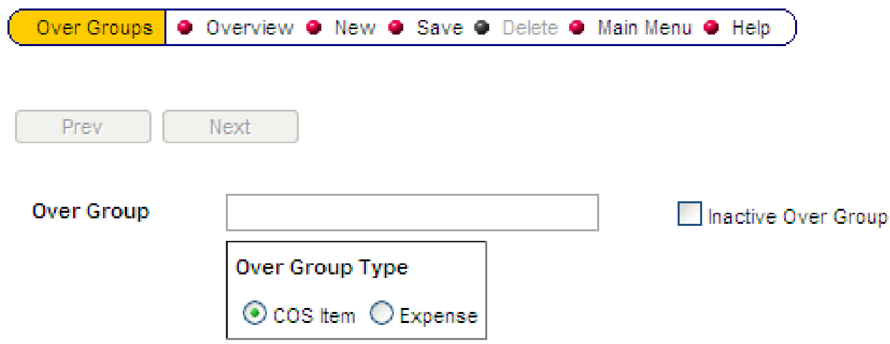


These filters behave as described in the Welcome section. For more information, please refer to the Screen Layout section of the Welcome page.

Create a New Over Group

From the Over Group Overview window, you can create a new Over Group.

1. Select New from the Top Menu Bar; the Over Group Detail window will appear with blank fields:



2. Enter the name of the Over Group and determine if it is a COS or an Expense

Tips & Tricks

This step is critical to configuring Over Groups. Once an Over Group is assigned a type and then saved, the type ***cannot*** *be changed. This type will designate all Major Groups, Item Groups, and Items below.*

Although type cannot be changed after it is saved, the Over Group can be deleted and re-added as long as no Major Groups have already been assigned to it.

3. Click Save; the Over Group will be saved. If you navigate back to the Over Group Overview window, you will see your new record in the list.

Over Groups Detail Window

From the Over Groups Detail window, you can modify existing Over Groups. The following section describes the elements contained in the Over Groups Detail window.

Top Menu Bar

Menu Item	Description
Overview	Go to the Overview area
New	Create a new Over Group
Save	Save updates to a recently created/modified Over Group
Delete	Delete an Over Group

Menu Item	Description
Main Menu	Return to the Main myinventory Menu
Help	Launch the Help file

Additional Screen Elements

Screen Element	Description
Next	View the previous entry in the Over Groups List
Previous	View the next entry in the Over Groups List
Inactive Over Group	Indicates an Over Group that is not active. Can be enabled or disabled, if necessary

Delete an Over Group

You may not delete an Over Group unless there are no child records that exist below it (child level of an Over Group would be a Major Group). Also, even when it is possible to "delete" an Over Group, you are never truly deleting it. Rather, you are merely setting its status to inactive.

However, if you do wish to "deactivate" an Over Group and no child records exists:

1. Select the Over Group from the Over Group Overview window
2. Select Delete from the Top Menu Bar
3. Click OK from the Delete Over Group confirmation dialog box

The Over Group will be set to inactive.

Major Groups

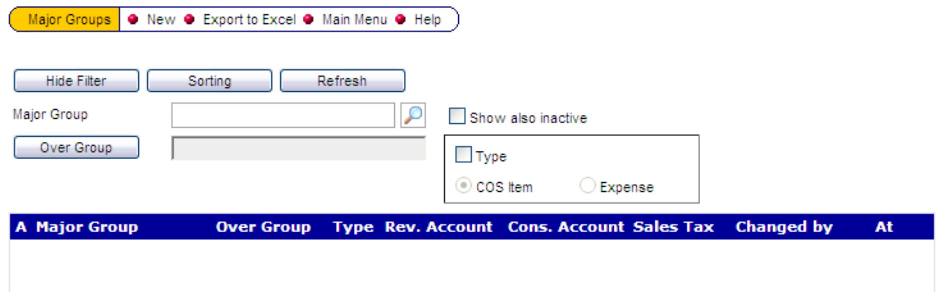
Tips & Tricks

The initial setup for Over Groups, Major Groups, Item Groups, Items, and Vendors is easier if carried out through the spreadsheet.

*However, if the spreadsheet method is used, all Over Groups, Major Groups, Item Groups, Items and Vendors **must** be entered using that method – it is an "all or nothing" procedure*

Major Groups Overview Window

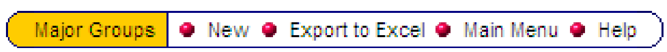
The first page you see after accessing the Major Groups module is the Major Groups Overview window. To see available Major Groups, you must click Refresh first:



From this window, you can review all existing Major Groups.

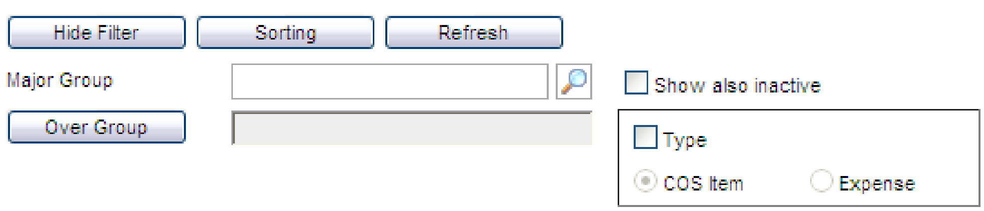
The following section describes the elements contained in the Major Groups Overview window.

Top Menu Bar



Menu Item	Description
New	Create a new Major Group
Export to Excel	Opens the current information into an Excel spreadsheet
Main Menu	Return to the Main myinventory Menu
Help	Launch the Help file

Additional Screen Elements

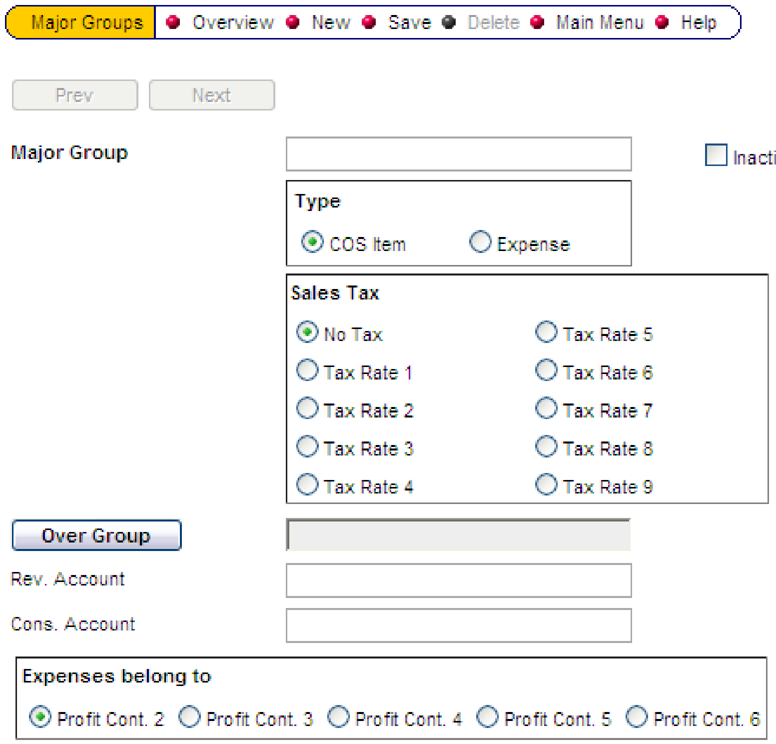


These filters behave as described in the Welcome section. For more information, please refer to the Screen Layout section of the Welcome page.

Create a New Major Group

From the Major Group Overview window, you can create a new Major Group.

1. Select New from the Top Menu Bar; the Major Group Detail window will appear with blank fields:



2. Enter the name of the Major Group and determine if it is a COS or an Expense

Tips & Tricks

*This step is critical to configuring Major Groups. Once a Major Group is assigned a type and then saved, the type **cannot** be changed. This type will designate all Item Groups and Items below.*

Although type cannot be changed after it is saved, the Major Group can be deleted and re-added as long as no Item Groups have been assigned to it.

3. Identify to which Over Group the Major Group will belong. This assignment is based on the type selected. If you need to see a list of available Over Groups, place your cursor inside the Over Group field and press Enter.
4. Determine Rev. Account, Cons. Account, Sales Tax, and Expenses (optional)
5. Click Save

Your new Major Group will be saved and available for use.

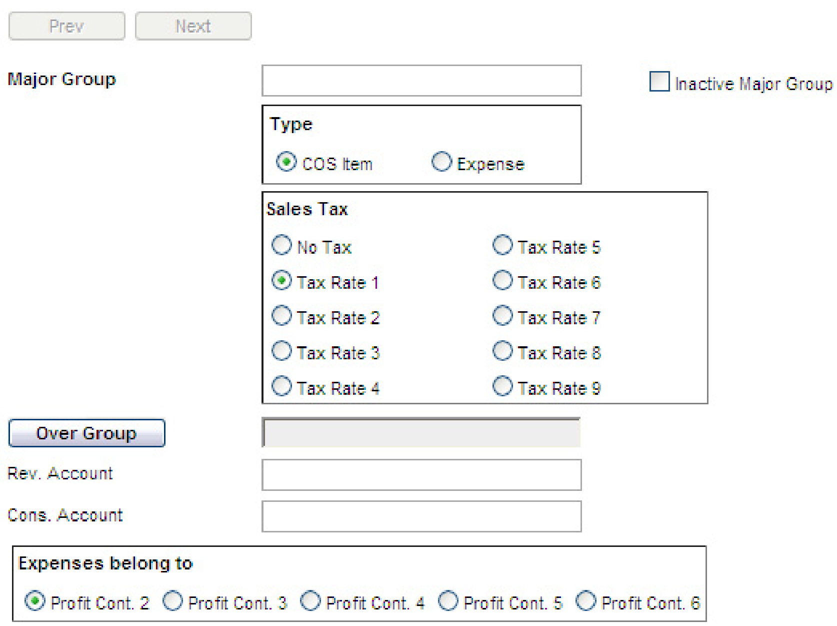
Major Groups Detail Window

From the Major Group Detail window, you can modify existing Major Groups. The following section describes the elements contained in the Major Group Detail window.

Top Menu Bar

Menu Item	Description
Overview	Go to the Overview area
New	Create a new Major Group
Save	Save updates to a recently created/modified Major Group
Delete	Delete a Major Group
Main Menu	Return to the Main myinventory Menu
Help	Launch the Help file

Additional Screen Elements



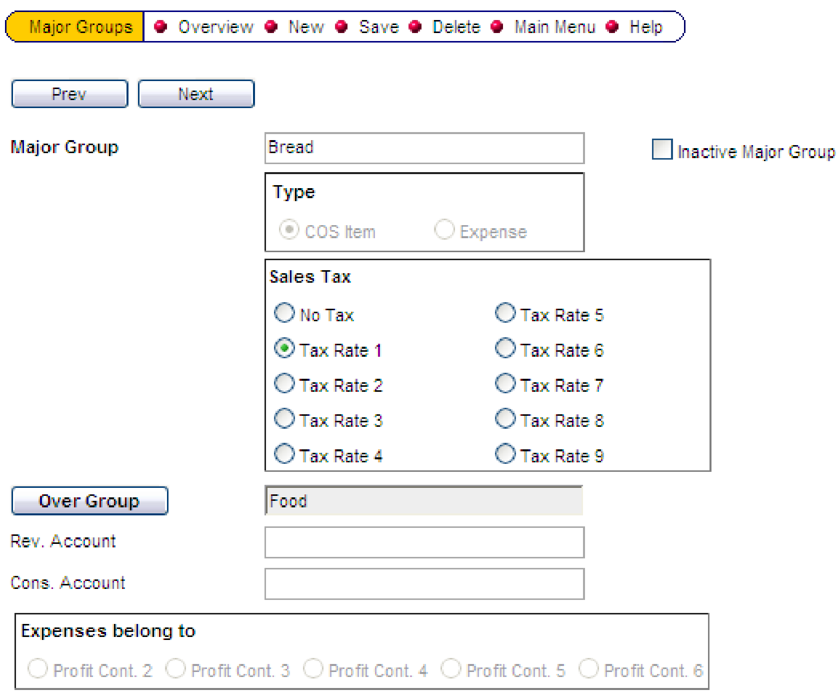
Screen Element	Description
Previous	View the previous entry in the Major Groups List
Next	View the next entry in the Major Groups List
Major Group	Displays the name of the Major Group

Screen Element	Description
Type	Identifies the Major Group type as Cost of Sales or Expense
Over Group	Displays the name of the Over Group that the Major Group belongs to
Rev. Account Cons. Account	Revenue Account or Consumption Account; these serve GL Account purposes
Expenses belong to	Categories for A/P or GL Reporting
Sales Tax	The Tax Rate defined here will be used in Recipes that belong to this Major Group. This allows a more detailed cost calculation, including Net and Gross Sales Price

Modify a Major Group

From the Major Groups Overview window, you can modify an existing Major Group:

1. Select a Major Group from the list; the screen will refresh and the Major Groups Detail window will appear:



2. Modify the fields as necessary
3. Click Save

The Major Group will be updated as per your modifications.

Delete a Major Group

You may not delete a Major Group unless there are no child records that exist below it (child level of a Major Group would be an Item Group). Also, even when it is possible to "delete" a Major Group, you are never truly deleting it. Rather, you are merely setting its status to inactive.

However, if you do wish to "deactivate" a Major Group and no child records exists:

1. Select the Major Group from the Major Group Overview window
2. Select Delete from the Top Menu Bar
3. Click OK from the Delete Major Group confirmation dialog box

The Major Group will be set to inactive. Only after a Major Group is deactivated can an Over Group (its parent) be deactivated, as well.

Item Groups

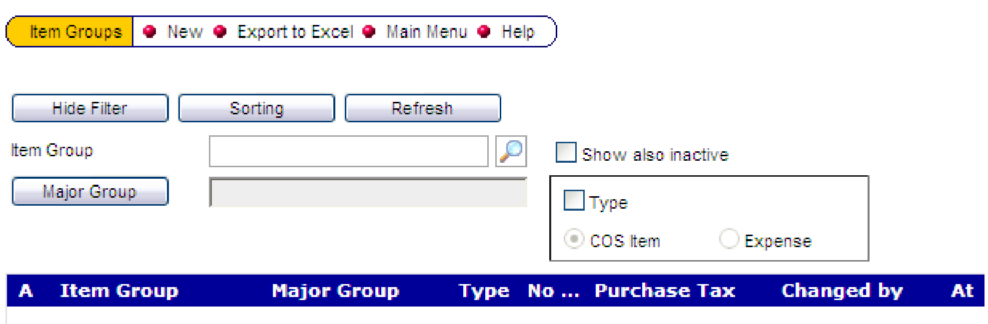
Tips & Tricks

The initial setup for Over Groups, Major Groups, Item Groups, Items, and Vendors is easier if carried out through the spreadsheet.

*However, if the spreadsheet method is used, all Over Groups, Major Groups, Item Groups, Items and Vendors **must** be entered using that method – it is an "all or nothing" procedure*

Item Groups Overview Window

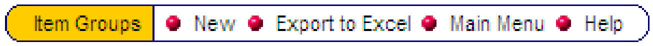
The first page you see after accessing the Item Groups module is the Item Groups Overview window. To see available Item Groups, you must click Refresh first:



From this window, you can review all existing Item Groups.

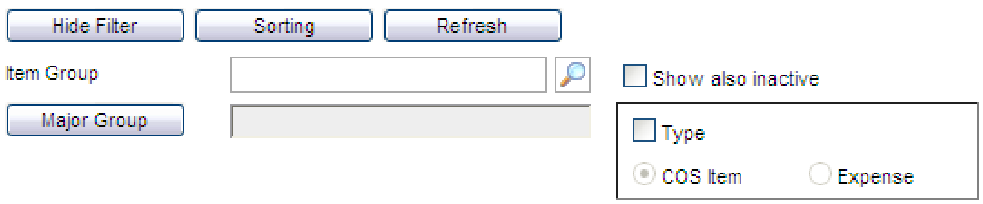
The following section describes the elements contained in the Item Groups Overview window.

Top Menu Bar



Menu Item	Description
New	Create a new Item Group
Export to Excel	Opens the current information into an Excel spreadsheet
Main Menu	Return to the Main myinventory Menu
Help	Launch the Help file

Additional Screen Elements

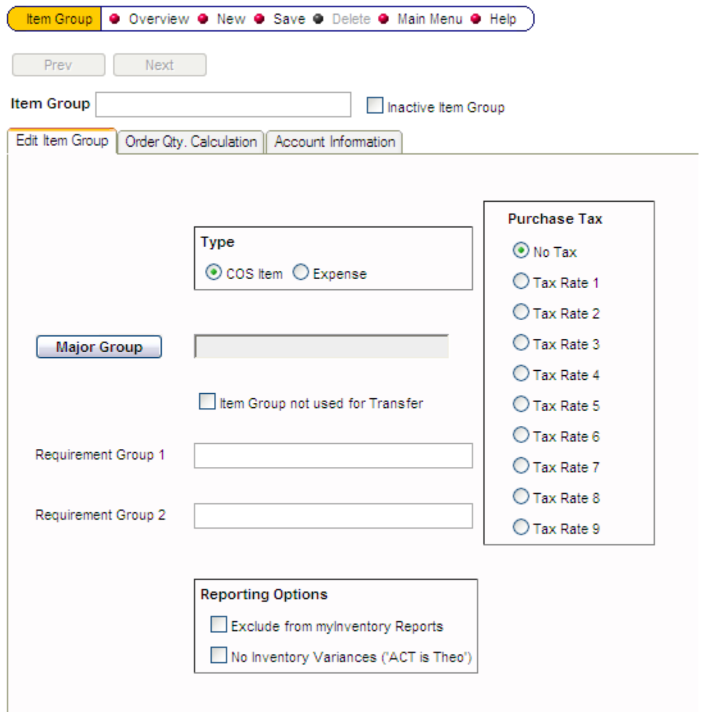


These filters behave as described in the Welcome section. For more information, please refer to the Screen Layout section of the Welcome page.

Create a New Item Group

From the Item Group Overview window, you can create a new Item Group.

1. Select New from the Top Menu Bar; the Item Group Detail window will appear with blank fields:



2. Enter the name of the Item Group and determine if it is a COS or an Expense

Tips & Tricks

*This step is critical to configuring Item Groups. Once an Item Group is assigned a type and then saved, the type **cannot** be changed. This type will designate all Item Groups, and Items below.*

Although type cannot be changed after it is saved, the Item Group can be deleted and re-added as long as no Items have been assigned to it

3. Identify to which Major Group the Item Group will belong. This will be based on the type selected. If you need to see a list of available Major Groups, place your cursor inside the Major Group field and press Enter.
4. Determine Requirements Groups and Sales Tax (optional)
5. Click Save

Your new Item Group will be saved and available for use.

Item Groups Detail Window

From the Item Group Overview window, you can modify existing Item Groups. The following section describes the elements contained in the Item Group Overview window.

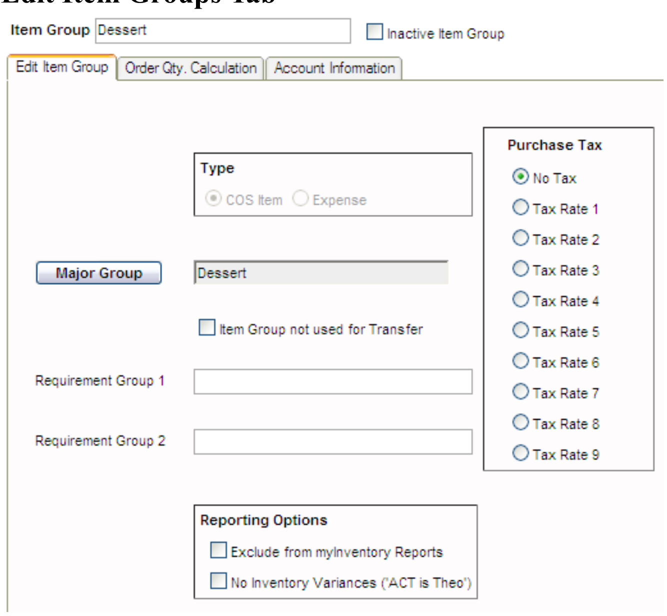
Top Menu Bar

Menu Item	Description
Overview	Go to the Overview area
New	Create a new Item Group
Save	Save updates to the recently created/modified Item Group
Delete	Delete an Item Group
Main Menu	Return to the Main myinventory Menu
Help	Launch the Help file

Additional Screen Elements

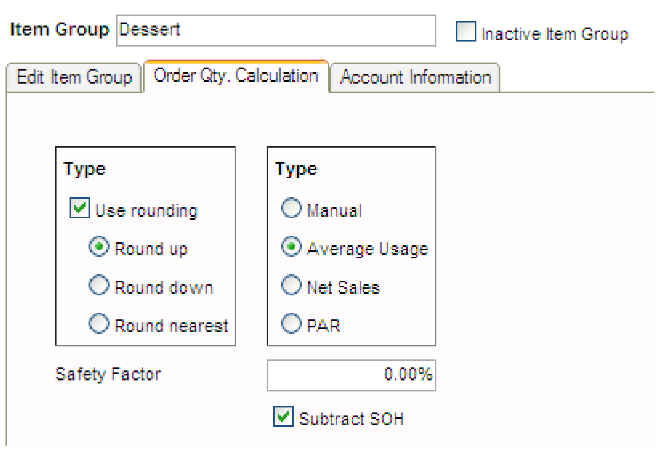
Screen Element	Description
Previous	View the previous entry in the Item Groups List
Next	View the next entry in the Item Groups List

Edit Item Groups Tab



- Type – determine how the Item Group will be classified, as either Cost of Sales or Expense. Once this has been saved during creation of the Item Group, it can no longer be modified
- Major Group – This is the name of the Major Group that the Item Group is assigned to
- Item Group not used for Transfer – enabling this feature will deem that all Items in this Item Group will be unavailable for Transfers or Requests
- Purchase Tax – Any taxes associated with buying a product
- Requirement Group 1 – This is the first Requirement Group that the Item Group will fit into
- Requirement Group 2 –This is the second Requirement Group that the Item Group will fit into
- Exclude from myinventory Reports – enabling this will remove this Item Group from all myinventory Reports in mymicros.net
- No Inventory Variances (‘ACT is Theo’) – enable this option if you do not want any variances to register for this Item Group. This option actualizes theoreticals in Inventory Counts so that ACT Value and Theo Value will always match in Inventory Counts

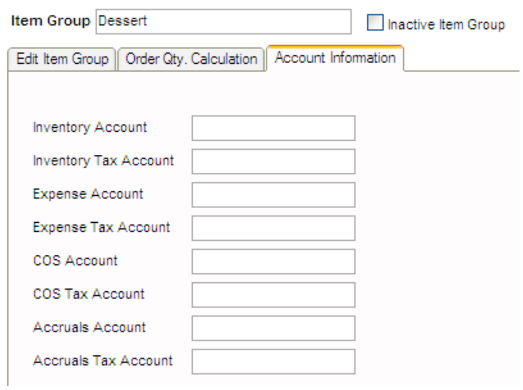
Order Qty. Calculation Tab



- Rounding - This determines the rounding of the Item in an Order. For example, if the Order calls for 8.76lbs of potatoes and potatoes are only available in 5lb bags, then, based on the selection, the Order will be rounded up, down, or to the nearest value. In this case, if Round Up is selected, the Order will be placed for two 5lb bags of potatoes.
- Manual – Orders will be calculated based on the manual entry of quantities in ordering; selecting this will override the values set in Item Groups
- Average Usage – Orders are calculated based on suggested forecast values and override any Average Usage values predetermined in Item Groups

- Net Sales – QTY will be calculated based on the Forecasted Sales information transferred from mymicros.net and a factor required to generate $1000 Revenue
- PAR – Orders are calculated based on PAR levels that are set in Manage Store
- Safety Factor – This is a percentage that will be ordered over the amount calculated. Entering a percentage will ensure that enough product (5% extra) is ordered in addition to the standing order to prevent shortages.
- Subtract SOH – Enabling this function will subtract the existing stock-on-hand from the Order amount. This will ensure the existing stock is not taken into consideration at the time of Order.

Account Information Tab

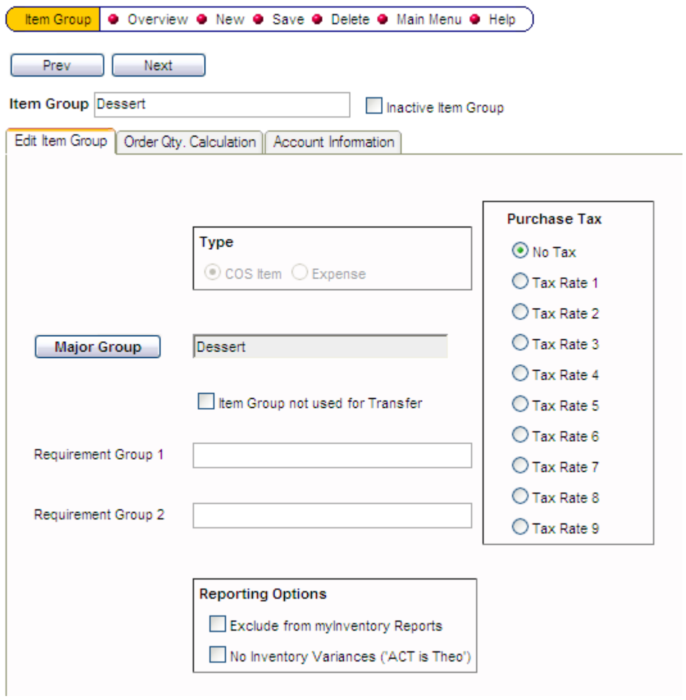


All of these fields are for GL Accounts. Inventory Account and Expense Account is automatic for GL; if there is an associated Tax Account, that information will be displayed here.

Modify an Item Group

From the Item Groups Overview window, you can modify an existing Item Group:

1. Select an Item Group from the list; the screen will refresh and the Item Group Detail window will appear:



2. Modify the fields/tabs as necessary; Item Group and Major Group are required fields on the Edit Item Group tab
3. Click Save

The Item Group will be updated as per your modifications.

Delete a Item Group

You may not delete an Item Group unless there are no child records that exist below it (child level of an Item Group would be an Item). Also, even when it is possible to “delete” an Item Group, you are never truly deleting it. Rather, you are merely setting its status to inactive.

However, if you do wish to “deactivate” an Item Group and no child records exist:

1. Select the Item Group from the Item Group Overview window
2. Select Delete from the Top Menu Bar
3. Click OK from the Delete Item Group confirmation dialog box

The Item Group will be set to inactive. Only after an Item Group is set to inactive can a Major Group (its parent) be deactivated as well.

Items

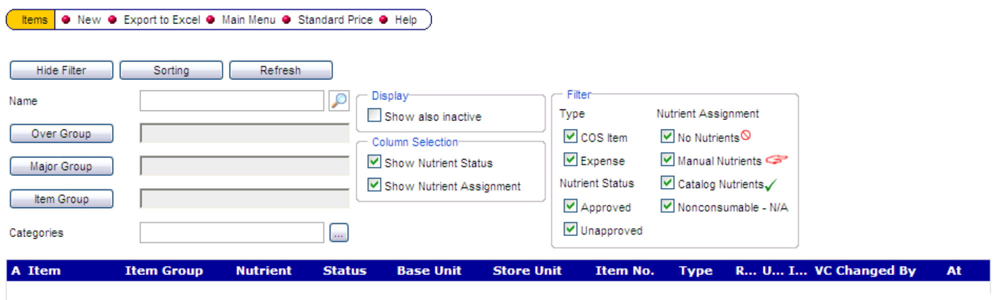
Tips & Tricks

The initial setup for Over Groups, Major Groups, Item Groups, Items, and Vendors is easier if carried out through the spreadsheet.

However, if the spreadsheet method is used, all Over Groups, Major Groups, Item Groups, Items and Vendors ***must*** *be entered using that method – it is an "all or nothing" procedure*

Items Overview Window

The first page you see after accessing the Items icon is the Items Overview window:

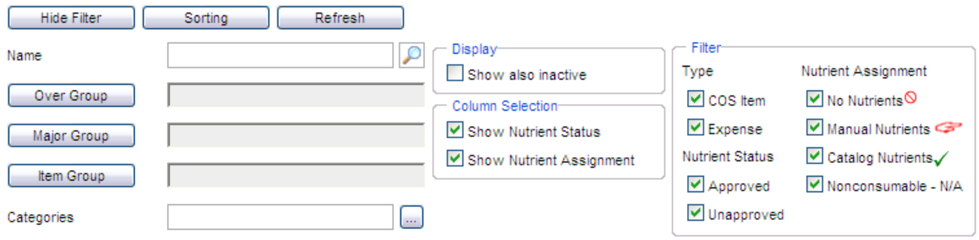


From this window, you can view individual Items and modify them as necessary. The following section describes the elements contained in the Items Overview window.

Top Menu Bar

Menu Item	Description
New	Create a new Item
Export to Excel	Opens the current information into an Excel spreadsheet
Main Menu	Return to the Main myinventory Menu
Help	Launch the Help file

Additional Screen Elements

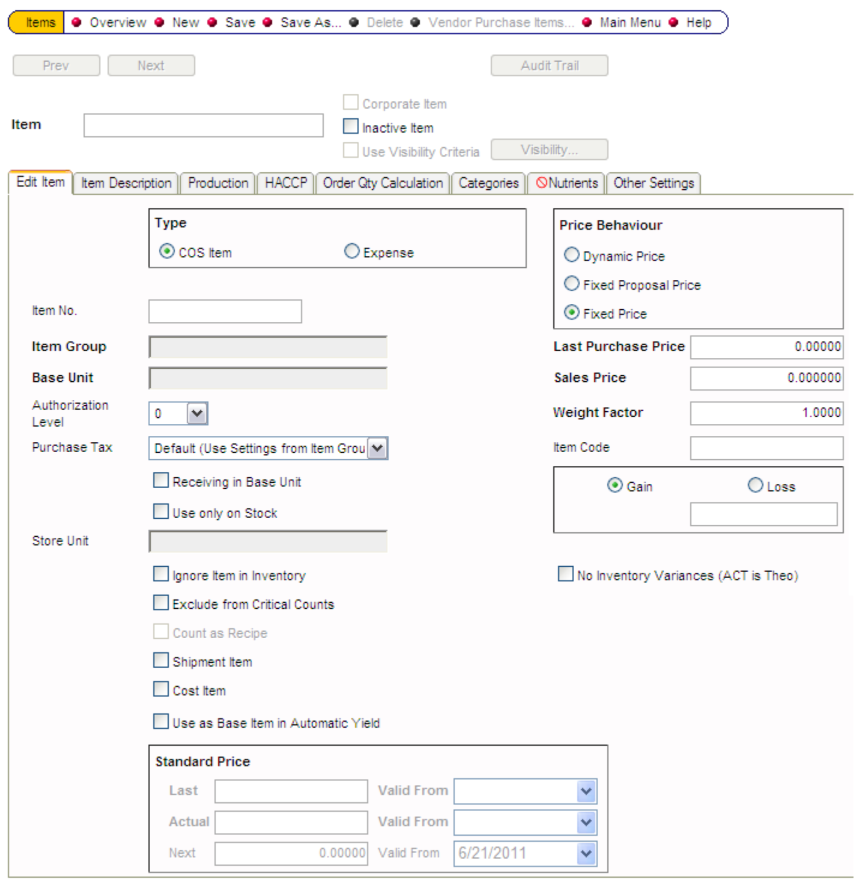


These filters behave as described in the Welcome section. For more information, please refer to the Screen Layout section of the Welcome page.

Create a New Item

From the Items Overview window, you can create new Items.

1. Select New from the Top Menu Bar; the Items Detail window will appear with blank fields:



2. Enter information in the fields on the Items Detail page; the Item Name, Type, Item Group, and Base Unit are mandatory

> **Tips & Tricks**
>
> *Make the Item Name as generic as possible, as Units and brands may change. Specific names can be assigned by creating Purchase Items in the Vendor Purchase Catalog. For example:*
>
> *"Bacon" is acceptable*
>
> *"Hormel Bacon" is not acceptable – what happens when the CC starts getting Oscar Meyer?*
>
> *If the Item is something specific, then it is acceptable to be specific. For example, Roma Tomatoes may not just be named tomatoes – that would be confusing*

3. Click Save; the Item will be saved. If you navigate back to the Items Overview window, you will see your new Item in the Items List.

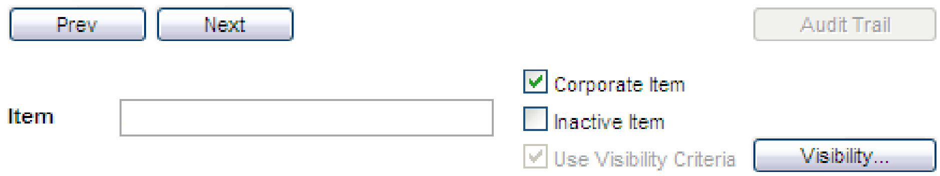
Items Detail Window

From the Items Detail window, you can modify existing Items. The following section describes the elements contained in the Items Detail window.

Top Menu Bar

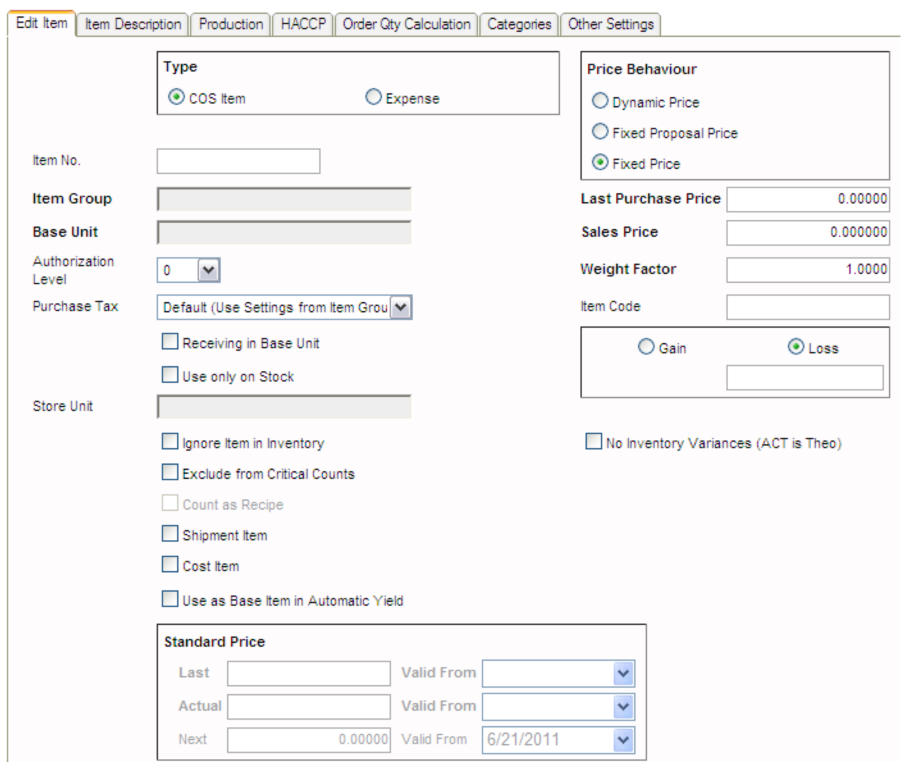
Menu Item	Description
Overview	Go to the Overview area
New	Create a new Item
Save	Save updates to a recently created/modified Item
Save As...	Save the Item using a different name
Delete	Delete an Item
Vendor Purchase Items...	Opens the Item in the Vendor Purchase Catalog
Main Menu	Return to the Main myinventory Menu
Help	Launch the Help file

Additional Screen Elements



Screen Element	Description
Previous	View the previous entry in the Item List
Next	View the next entry in the Item List
Audit Trail	Opens a new window, displaying the history of the Item
Visibility	Opens a window in which Visibility characteristics can be assigned. For more information on Visibility, see the section under Master Data entitled “Visibility Criteria”.

Edit Item Tab



- Type – Determine how the Item will be classified, either as a COS or an Expense Item.

> **Tips & Tricks**
>
> *This step is critical to configuring Items. Once an Item is assigned a type and then saved, the type cannot be changed. This type will designate the Item Group that this Item can be assigned to.*
>
> *Although type cannot be changed after it is saved, the Item can be deleted and re-added as long as it has not been designated as a child record elsewhere.*

- Item No. – Internal Item number. This number is not used as an external number on, for example, order forms. If you have Item numbers specific to certain Vendors, you may enter them in the Vendor Purchase Catalog.
- Item Group – Provides a list of appropriate Item Groups based on type selection
- Base Unit – The Base Unit depends on the usage of this Item in Recipes and transfer posting. An Item can be posted as each or in parts of the Purchase Unit. Generally, a Base Unit is determined by 1 of 3 characteristics: (1) if it will be sold as a whole, i.e., not broken into parts; (2) if it *will* be broken into parts; (3) if it is a liquid that is capable of being broken into parts. An example of an Item sold as a whole is a bagel; Items such as these are classified as “each”. An example of an Item that is sold in parts is ground beef; a 4 lb. package of ground beef can be separated into 16-4oz hamburger patties to be sold; the Base Unit, however, would be a pound. For liquids, the Base Unit would be a pint; an example would be a pint of milk that can be broken into serve 2-8oz glasses.

> **Tips & Tricks**
>
> *This step is critical when creating new Items. Once a Base Unit is assigned to an Item and then saved, the Base Unit cannot be changed for that Item. This Unit is very important since it will be the base of any Unit used for this Item in Orders, Transfers, Inventory Counts, and Recipes.*
>
> *If an incorrect Base Unit has been assigned, the Item can be deleted and re-added with the correct Base Unit.*
>
> *Keep in mind that an Item cannot be deleted if it is contained in any Recipes or if it has been assigned a Vendor Purchase Item.*

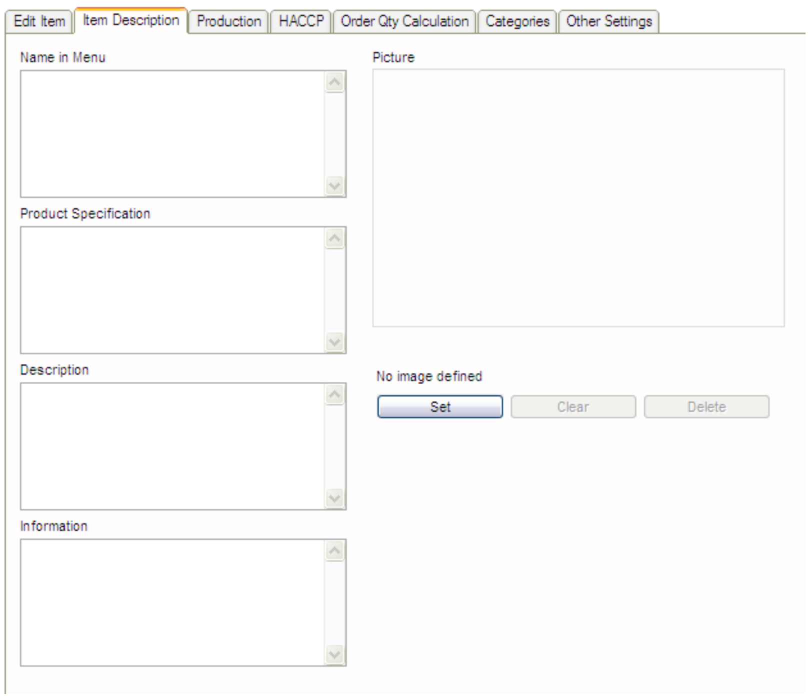
- Authorization Level – Select the Authorization Level (0-6) for this Item This level enables the User to create Purchase Orders, Requests and Transfers for Items of the same or lesser authorization levels, as well as approve Receipts at an authorization level equal to or less than the User’s level
- Purchase Tax – Indicate the Taxes for the Item when Purchased
- Receiving in Base Unit – Can only be Received in the Base Unit of the Item

- Use only on Stock – enable this to prevent a Vendor Purchase Item from being created with this Item name
- Store Unit – the main Unit used by a store for Inventory Counts and reporting.
- Ignore Item in Inventory – enable this option if the Item should not be displayed in any Inventory Count, (ex. Period Close Count - Item is not displayed but will be booked with the Closing Method), even if the Item is assigned.
- Exclude from Critical Counts – enable this to prevent the Item from being included in Critical Counts
- Count as Recipe – if this is enabled, this Item is also a Recipe that is being counted as an Item
- Shipment Item – indicates that the Item should be considered in Shipment Adjustments
- Cost Item – if an adjustment, such as Shipping Costs, is included in an Invoice, Items marked as Cost Items will incure a split of those costs.
- Use as Base Item in Automatic Yield – enable this to use this Item as a Base Item for Automatic Yield containers.
- Standard Price - Displays the Last Standard Price, the Actual Standard Price, and allows you to enter the Next Standard Price
- Price Behavior – There are three characteristics that can be assigned to prices:
  - Dynamic – price can be changed at anytime (based on User Rights)
  - Fixed Proposal – price can only be changed in Receiving, not in Ordering (based on User Rights)
  - Fixed Period – price cannot be changed anywhere
- Last Purchase Price – The system displays the last purchase price per Base Unit of the Item. It starts at 0 (zero) and is overwritten with the first Receipt.
- Sales Price – A Cost Center can be configured to use this price for Transfers
- Weight Factor – based on the Base Unit; how much does the product weigh in
- Item Code – this is similar to an Item Number; the eventual plan is to be able to link it to bar codes
- Gain/Loss – if the Item has a Gain or Loss percentage associated with it, select the appropriate option and enter the percentage in the field below
- No Inventory Variances (Theo is ACT) – enable this option if you do not want any variances to register for this Item. This option actualizes theoreticals in Inventory Counts. This feature is good for an Item where there will always be variances and never produce any depletes (ex. Ketchup packets since there is no control over how many ketchup packets one customer will take). This variance can be booked to a Waste Group by navigating to Maintenance | Settings | Inventory tab and enabling the option Book ACT is Theo Variances to Waste and then selecting the Waste Group to assign it to in the drop down field.

Item Description Tab

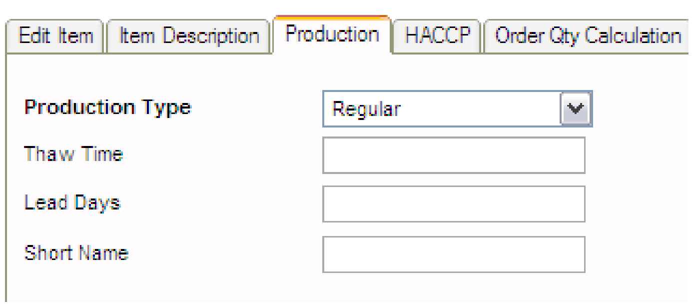
The Item Description Tab is where you can enter freehand information. Enter as much or as little information as you would like. Keep in mind that the more information you enter, the more descriptive it will be to other Users.

You may include a Picture for Items, is desired. To do so, select Set to choose an Image from the database. Click on the Item Picture to use and select OK. Images that have been added in Maintenance | Settings | Image tab will be available for attachment. For more information regarding uploading Images, please see the Maintenance section of this document.

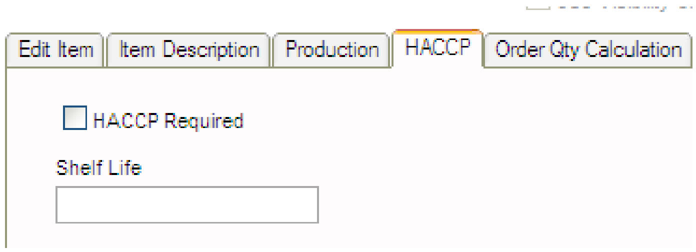


Production Tab

Set the Production type here. The options are Regular, Preparation, or Thaw. You will also need to enter the Thaw Time, Lead Days and Short Name for the Item.

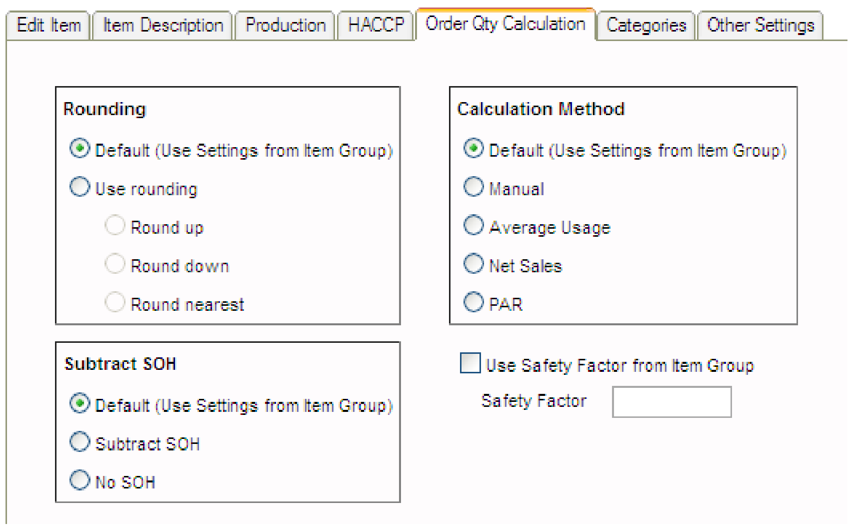


HACCP Tab



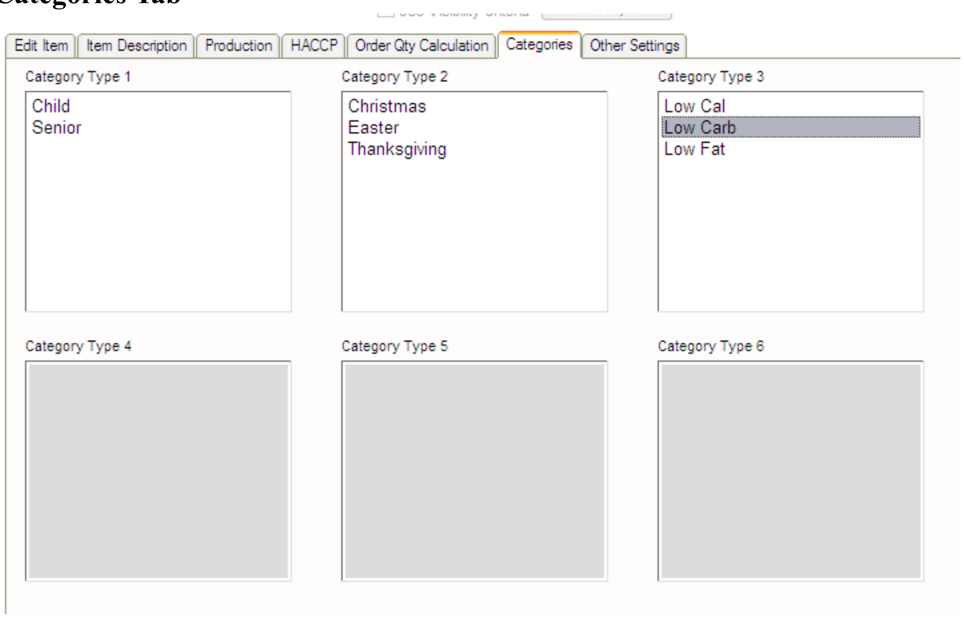
HACCP Required - enable this if the Item is subject to Hazardous Analysis and Critical Control Point (HACCP) standards. Please note that this option works in conjunction with the HACCP settings configured in Master Data | Cost Centers. Take heed in enabling options only as necessary.

Order Qty Calculation Tab



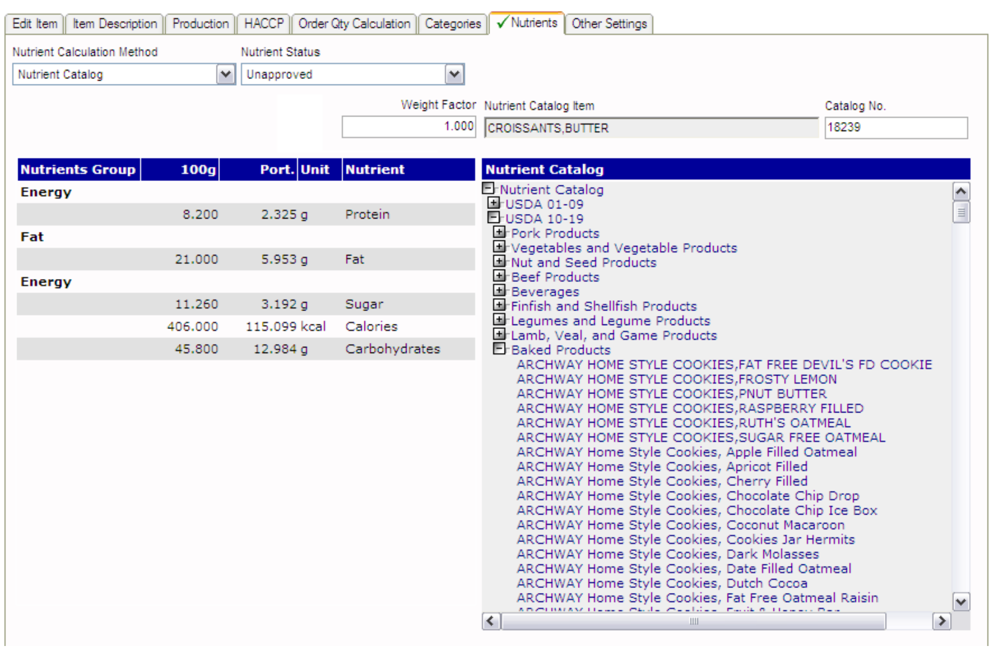
- Rounding – You may override the rounding settings here. If you wish to use the same rounding method dictated in the Item Group module, leave this value defaulted.
- Subtract SOH – You may override the Subtract SOH settings here. If you wish to use the same settings determined in the Item Group module, leave this value defaulted.
- Calculation Method – You may override the Calculation Method settings here. If you wish to use the same settings determined in the Item Group module, leave this value defaulted.
- Use Safety Factor from Item Group – You may override the Safety Factor settings here. If you wish to use the same settings determined in the Item Group module, leave this value defaulted.

Categories Tab



Assign Categories to the Item in this tab. For an Overview of Categories, see the Categories section in the Master Data document.

Nutrients Tab



The Nutrients tab is where you can assign and maintain an Item's Nutrient information. There are four options in the Nutrient Calculation Method drop down:

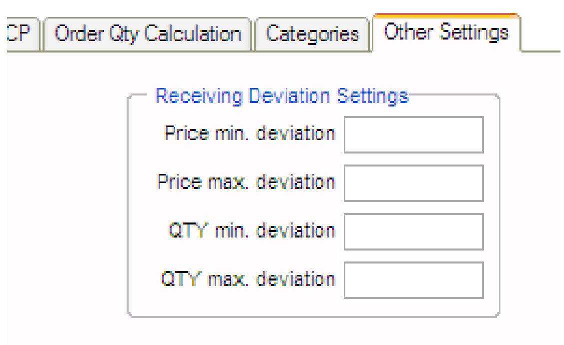
- None - When an Item is created, this will be the default method assigned.
- Nutrient Catalog - Select this option to link the Item to an Item from an imported Nutrient Catalog
- Manual - Select this option to enter Nutrition information manually
- Nonconsumable - Select this option for non-food and non-drink items, i.e. cleaning supplies, paper goods, ect.

Nutrient Status - An Item can be assigned a Nutrient Status of Approved or Unapproved. This function exists for organizations that have a Nutritional Manager who is responsible for verifying that all Nutrition information is correct. If enabled, any occurrence when data is modified that may alter Nutritional values will cause the Status to revert to Unapproved so the Nutrition manager will know that it needs to be reviewed and reapproved.

If Manual Calculation is chosen, the fields in the Nutrient grid will be editable. Once you have entered the information for the Item, select Save.

If Nutrient Catalog is the chosen calculation method, the Nutrient Catalog Item field will be enabled. You can search for an Item in two ways - type the name in the Item field and select enter to populate a list of matches, or by expanding the Nutrient Catalog and searching through the categories available. Once you select an Item by using either method, the Nutrition information will populate in the grid. Select Save before leaving the Item Detail window to retain the chosen information.

Other Setting Tab

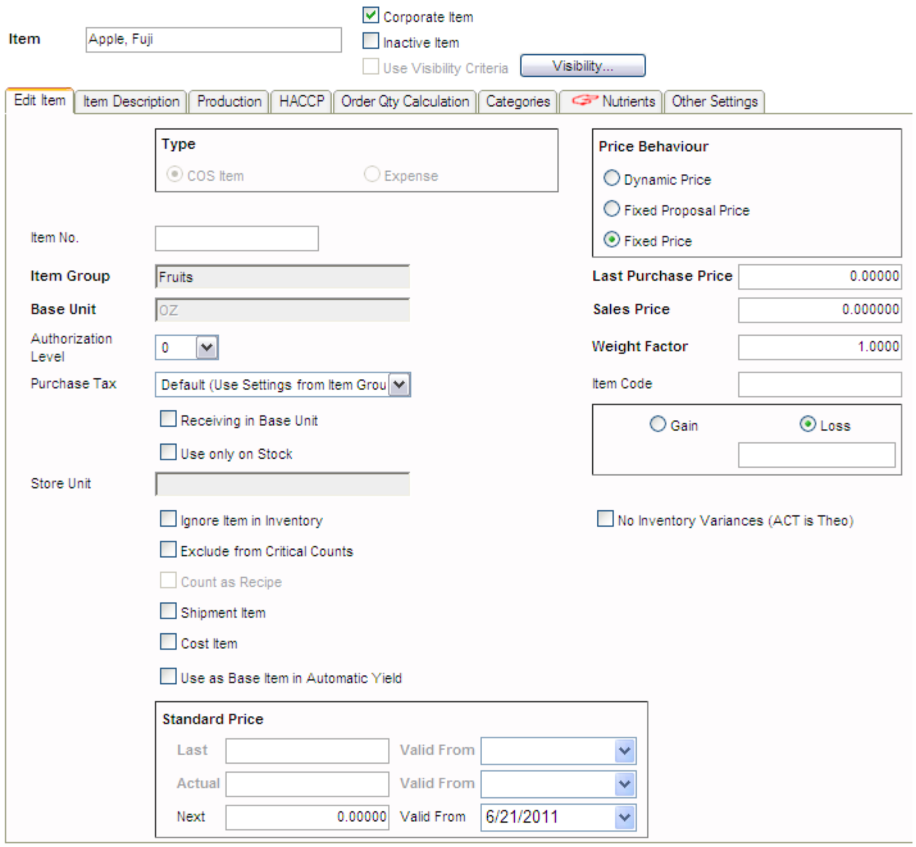


Enter information in these fields if you would like to receive a warning when there is a large deviation between what was ordered and what was delivered.

Modify an Item

From the Items Overview window, you can modify existing items.

1. Select an Item from the list; the screen will refresh and the Items Detail window will appear:



2. Modify the fields on each of the tabs, if necessary.

Tips & Tricks

Base Unit and Type cannot be edited after the Item is saved for the first time.

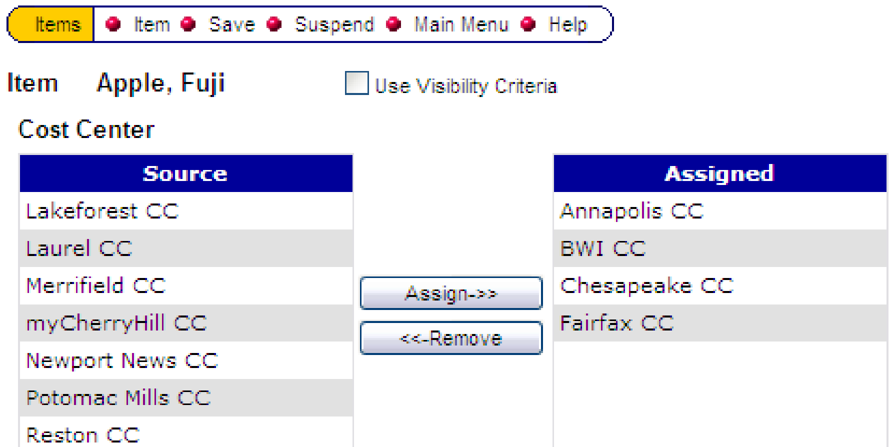
3. Click Save from the Top Menu Bar.

To Adjust Visibility of an Item

You are able to determine which Cost Centers will be able to see which Items. This is especially useful for organizations that may have regional Menu Items or organizations that have different types of Cost Centers. In cases like these, an administrator may adjust and modify the Visibility characteristics to ensure the proper Users are receiving the correct information. To adjust the Visibility of a Cost Center:

1. From the Items Overview window, select an Item (or create a new one)

2. Click the Visibility button; the Items Visibility Assignment page will appear:



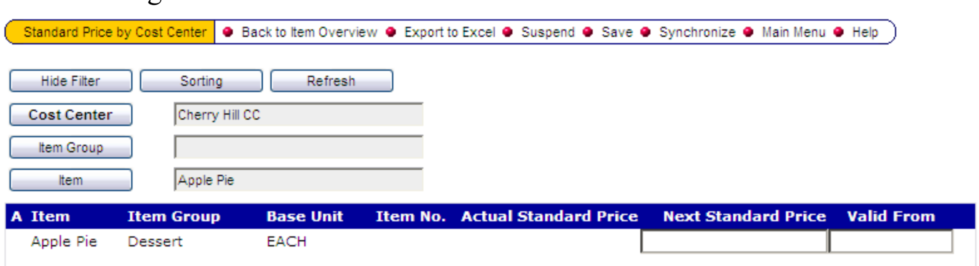
3. Modify Assigned using Cost Centers from Source
4. Select Use Visibility Criteria if you want these changes to be implemented
5. Select Save from the Top Menu Bar (after your modifications are complete)

The page will refresh with your modified Visibility Criteria.

Assign a Standard Price to Multiple Items

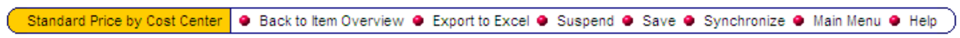
Organizations using Standard Prices in their Cost Centers, which is configured in Maintenance | Cost Centers and Locations | Costing Method, may assign Standard Prices to several Items at a time in the Standard Price screen. In addition, it is also possible to assign different prices to different Cost Centers. This is helpful in the event that an organization has Cost Centers that use different currencies, which would result in very different Standard Prices. The Standard Price screen can be found by selecting the link in the Items Overview Screen.

The following screen will be visible:



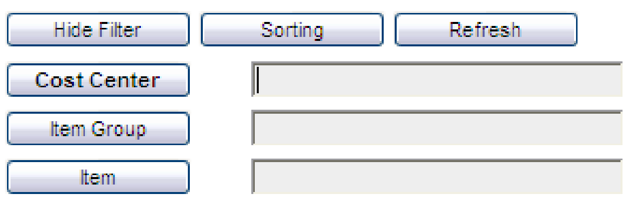
From this window, you can modify Standard Prices and Validity dates, synchronize the Standard Prices from one Cost Center to another, and export the information to an Excel spreadsheet for further analysis. The following section describes the elements contained in the Standard Price window.

Top Menu Bar



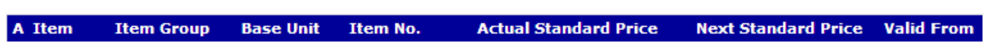
Menu Item	Description
Back to Item Overview	Returns to the Item Overview window
Export to Excel	Opens the current information into an Excel spreadsheet
Suspend	Saves the data entered and returns you to the Items Overview window
Save	Saves the data entered
Synchronize	Opens a new window in which Standard Prices can be synced from one Cost Center to another
Main Menu	Return to the Main myinventory Menu
Help	Launch the Help file

Additional Screen Elements



These filters behave as described in the Welcome section. For more information, please refer to the Screen Layout section of the Welcome page.

Information Bar

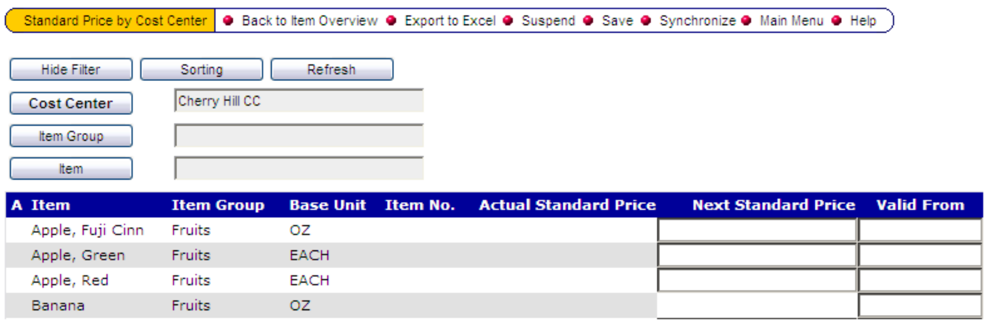


Menu Item	Description
Item	Displays the Item name
Item Group	Displays the Item Group
Base Unit	Displays the Item's Base Unit
Item No.	Displays the Item No.
Actual Standard Price	Displays the current Standard Price

Menu Item	Description
Next Standard Price	Enter the Next Standard Price for the Item
Valid From	Enter the date that the Price becomes Valid

Entering a Standard Price

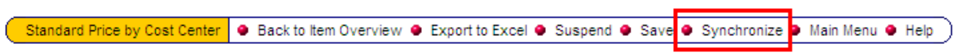
Use the filter to select a Cost Center to assign Standard Prices to. You may also narrow your search by selecting an Item Group or an individual Item.



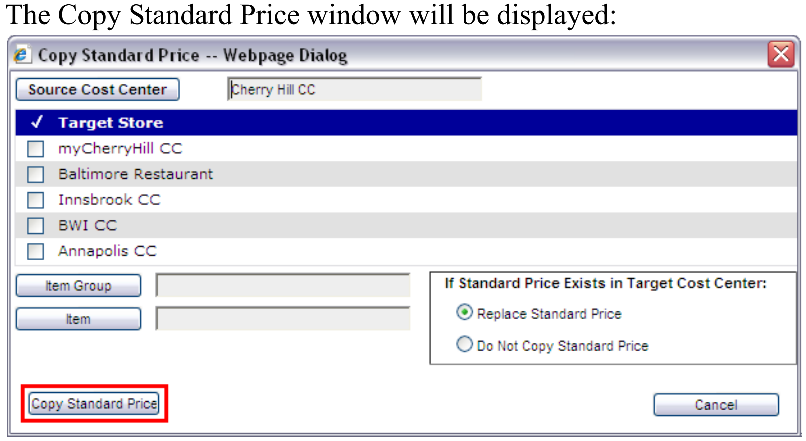
1. Enter the Next Standard Price and a Valid From date, if necessary, for the selected Item(s)
2. Continue entering prices and dates for all of the Items necessary.
3. When finished, select Save to remain in the Standard Price window or Suspend to save the information and return to the Items Overview window.

Copying Standard Prices by Cost Center

You can copy the Standard Price of an Item or Item Group from one Cost Center to others by selecting the Synchronize option from the Top Menu Bar.



The Copy Standard Price window will be displayed:



1. Use the filter to select a Source Cost Center, which is the Cost Center that Standard Prices will be copied from
2. Select the Target Store(s) by checking the box to the left of each Store's name
3. Use the Item Group or Item filter to choose the Standard Price(s) to be copied
4. Indicate what should occur if a Standard Price exists in the Target Cost Center(s):
   - Replace Standard Price: Overwrites the existing Standard Price with the one being copied
   - Do Not Copy Standard Price: Retains the existing Standard Price
5. Select the Copy Standard Price key

The Standard Price(s) from the Source Cost Center will be copied to the Target Cost Center(s).

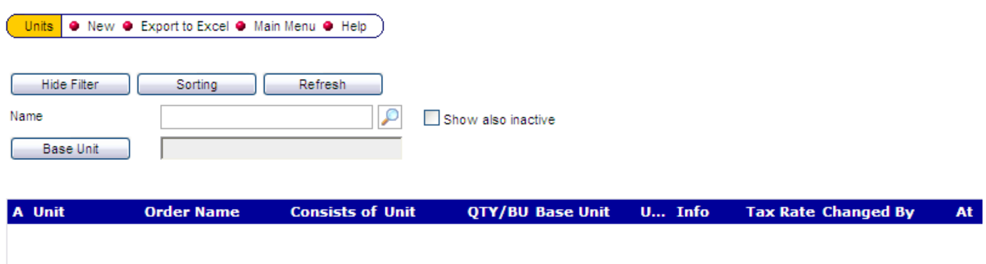
Delete an Item

To delete, please refer to the Delete Items section of this document.

Units

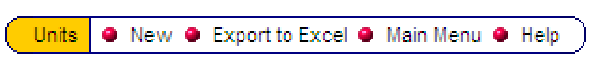
Units Overview Window

The first page you see after accessing the Units module is the Units Overview window:



From this window, you can modify and select Units. The following section describes the elements contained in the Units Overview window.

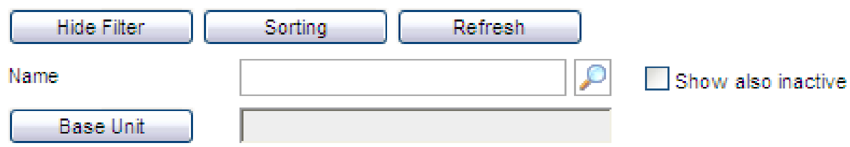
Top Menu Bar



Menu Item	Description
New	Create a new Unit
Export to Excel	Opens the current information into an Excel spreadsheet

Menu Item	Description
Main Menu	Return to the Main myinventory Menu
Help	Launch the Help file

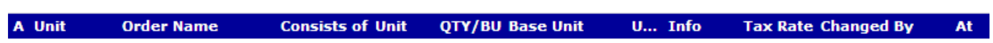
Additional Screen Elements



These filters behave as described in the Welcome section. For more information, please refer to the Screen Layout section of the Welcome page.

Screen Element	Description
Base Unit	Standard Units, such as each, pint, pound, and portion, are already in the system when it is installed. Generally, items fall into 3 categories: 1. those that are sold whole (bagel) 2. solids that are sold in fractions (1 lb. of ground beef turned into 4 - 4 ounce hamburger patties) 3. liquids that are broken into pints (quart of milk turned into glasses to be served) Once a Base Unit has been assigned, it cannot be changed.

Information Bar



Menu Item	Description
Unit	Displays the Unit Name
Order Name	Displays the name of the Order Unit
Consist of Unit	Amount and Unit of this Unit's sub-Unit An Item's Base Unit must coincide with the Unit's own Base Unit. For example, if an Item is purchased in a 0.35l bottle using the Unit Bottle 0.35, the Item's Base Unit must be Pint.
QTY/BU Base Unit	Quantity per associated Base Unit
Unit in Stock Taking	Enabling this will allow the Unit to be used in Inventory Counts.
Info	Displays information entered about the Unit

Menu Item	Description
Tax Rate	Displays the tax rate the affects this Unit
Changed By	Displays the last User to modify this Unit
At	The date this Unit was last modified

Create a New Unit

From the Unit Overview window, you can create a new Unit.

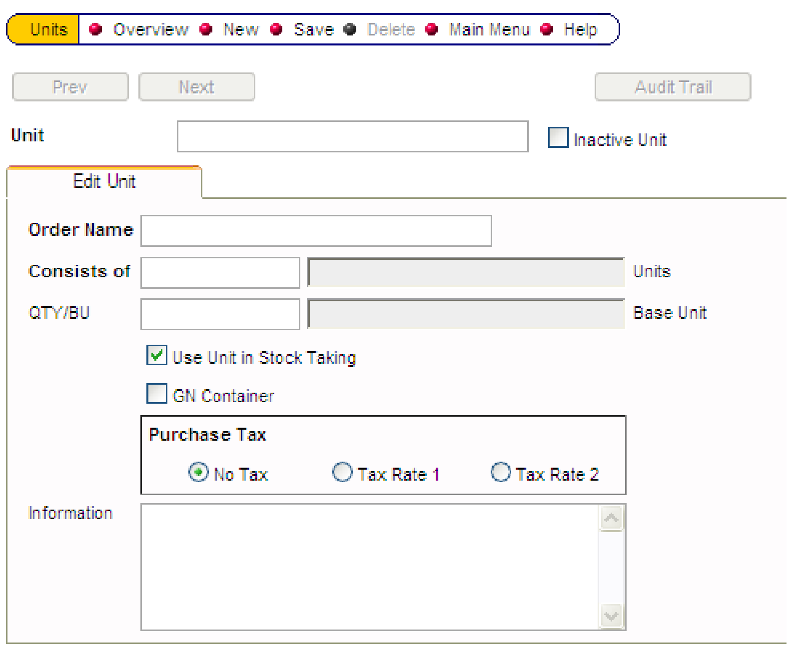
Tips & Tricks

Units should be named as generically as possible so that they are able to be used for multiple Items. For example:

- *12oz Beer Bottle is too specific*
- *12oz Bottle is specific, but it could be 12oz bottle of anything*
- *5lb cheddar wheel is too specific*
- *5lb cheese wheel or 5lb wheel or simply 5lb is more versatile*

The more generic the name, the more possible its uses and the less Item Units will need to be created to compensate for all Units.

1. Select New from the Top Menu Bar; the Unit Detail window will appear with blank fields:



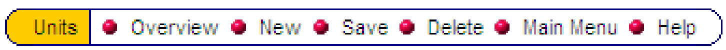
2. Enter the necessary fields. Unit, Order Name, Consists of, Units are mandatory; QTY/BU and Base Unit will auto-populate after clicking Save; all other fields are optional.
3. Click Save

Your new Unit will be saved and available for use.

Units Detail Window

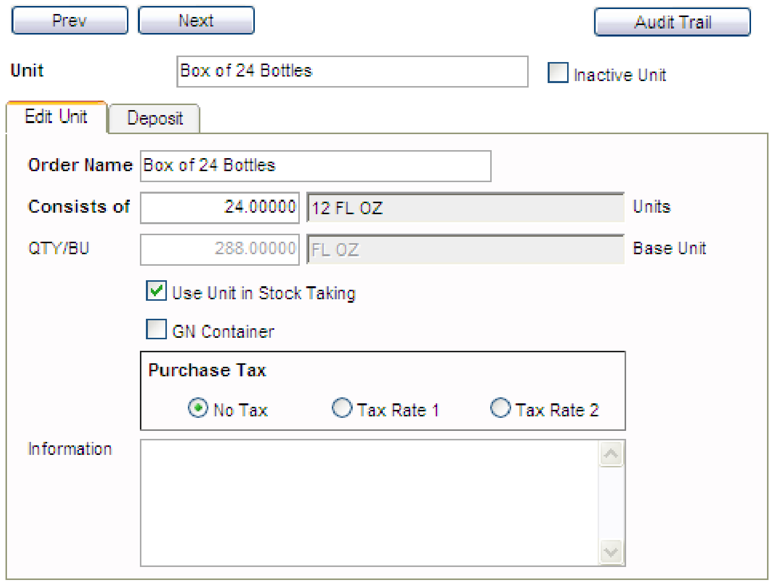
From the Unit Detail window, you can modify existing Units. The following section describes the elements contained in the Unit Detail window.

Top Menu Bar



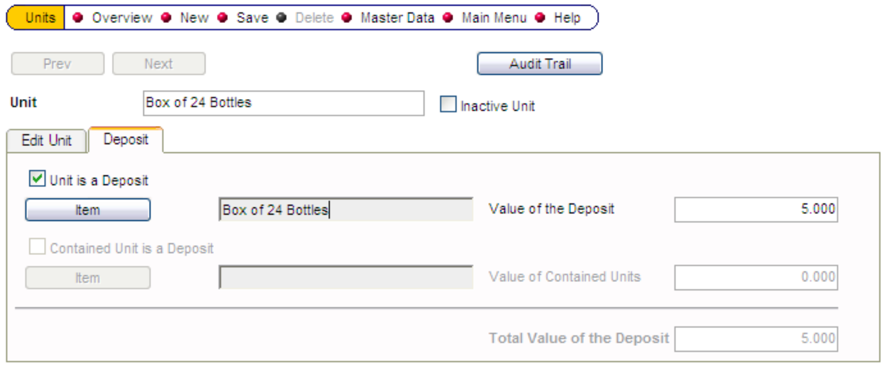
Menu Item	Description
Overview	Go to the Overview area
New	Create a new Unit
Save	Save updates to a recently created/modified Unit
Delete	Delete a Unit
Main Menu	Return to the Main myinventory Menu
Help	Launch the Help file

Additional Screen Elements



Screen Element	Description
Previous	View the previous entry in the Units List
Next	View the next entry in the Units List
Consists of/Units	Amount and Unit of this Unit's sub-Unit An Item's Base Unit must coincide with the Unit's own Base Unit. For example, if an Item is purchased in a 0.35l bottle using the Unit Bottle 0.35, the Item's Base Unit must be Pint.
QTY/BU/Base Unit	Quantity per associated Base Unit
Use Unit in Stock Taking	Enable this feature if the Unit will be used in Inventory Counts
Purchase Tax	Any taxes associated with buying a product in the Unit, i.e., extra tax for glass bottles.
Information	Enter additional information here if necessary

Deposit Tab

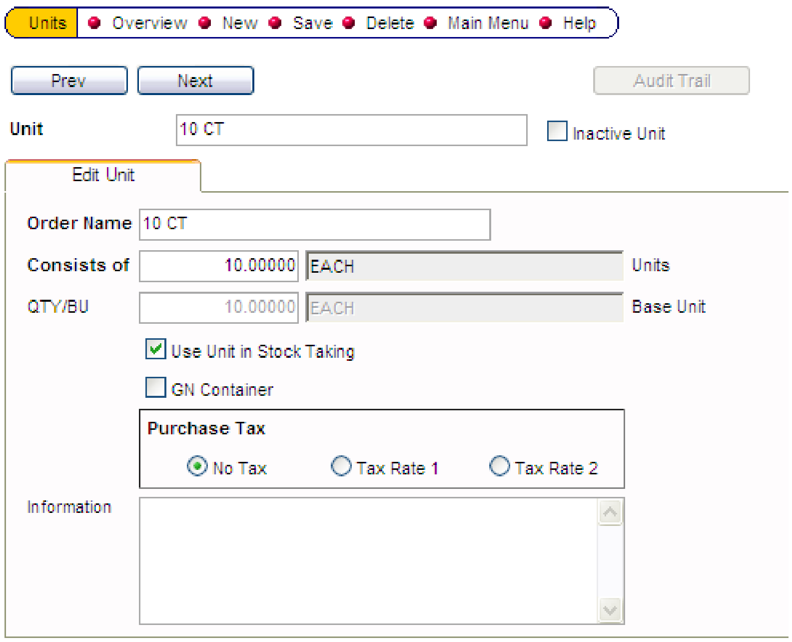


Screen Element	Description
Unit is a Deposit	Enable this if the Unit is for a Deposit Item
Item	Select the Deposit Item
Value of the Deposit	Displays the value of the Deposit
Contained Unit is a Deposit	Enable this if the Unit contained within the selected Unit is a Deposit
Item	Select the contained Deposit Item
Value of Contained Units	Displays the value of the contained Unit
Total Value of the Deposit	Displays the total value of the Deposit

Modify a Unit

From the Units Overview window, you can modify an existing Unit:

1. Select a Unit from the list; the screen will refresh and the Units Detail window will appear:



2. Modify the fields as necessary;
3. Click Save

The Unit will be updated as per your changes.

Delete a Unit

To delete a Unit, please refer to the Deleting a Document section of this document.

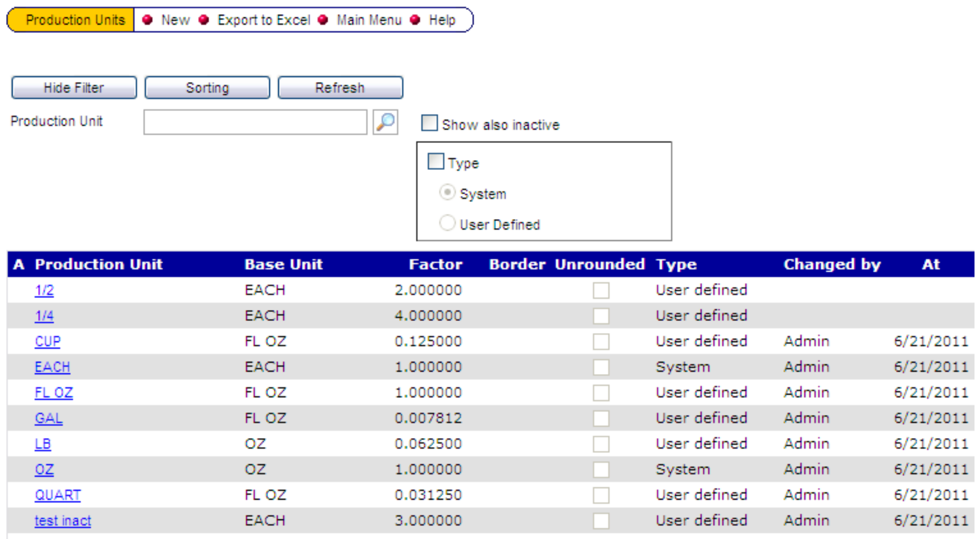
Production Units

Production Units are the Units that are assigned to Recipe Ingredients to provide a more manageable way to read the Recipe. They are the sizes that people are most familiar with. For example, measurements like cup, teaspoon, and ounces are all considered Production Units.

The following sections describe how Production Units are used and how they can be created and modified.

Production Units Overview Window

The first page you see after accessing the Production Units icon is the Production Units Overview window:



A	Production Unit	Base Unit	Factor	Border	Unrounded	Type	Changed by	At
	1/2	EACH	2.000000			User defined		
	1/4	EACH	4.000000			User defined		
	CUP	FL OZ	0.125000			User defined	Admin	6/21/2011
	EACH	EACH	1.000000			System	Admin	6/21/2011
	FL OZ	FL OZ	1.000000			User defined	Admin	6/21/2011
	GAL	FL OZ	0.007812			User defined	Admin	6/21/2011
	LB	OZ	0.062500			User defined	Admin	6/21/2011
	OZ	OZ	1.000000			System	Admin	6/21/2011
	QUART	FL OZ	0.031250			User defined	Admin	6/21/2011
	test inact	EACH	3.000000			User defined	Admin	6/21/2011

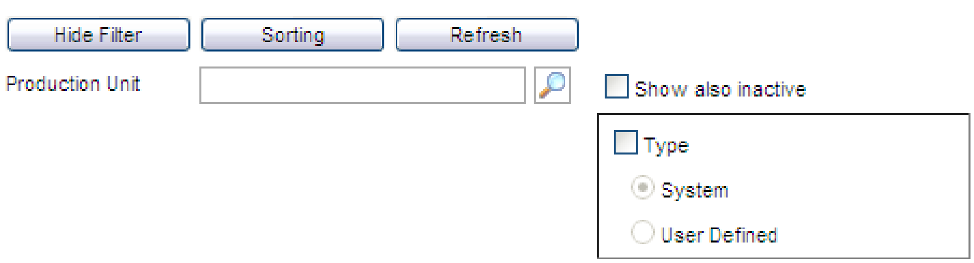
From this window, you can create new Production Units, as well as modify existing Production Units.

The following section describes the elements contained in the Production Units Overview window.

Top Menu Bar

Menu Item	Description
New	Create a new Production Unit
Export to Excel	Opens the current information into an Excel spreadsheet
Main Menu	Return to the Main myinventory Menu
Help	Launch the Help file

Additional Screen Elements



These filters behave as described in the Welcome section. For more information, please refer to the Screen Layout section of the Welcome page.

Menu Item	Description
Production Unit	Displays the name of the Production Unit
Show also inactive	If you would like to view inactive Production Units that are no longer being used, this feature can be enabled.
Type ◆ System ◆ User-Defined	Specify what type of Production Unit to view: System – available to all Users User-Defined – only available to the creator of the Unit

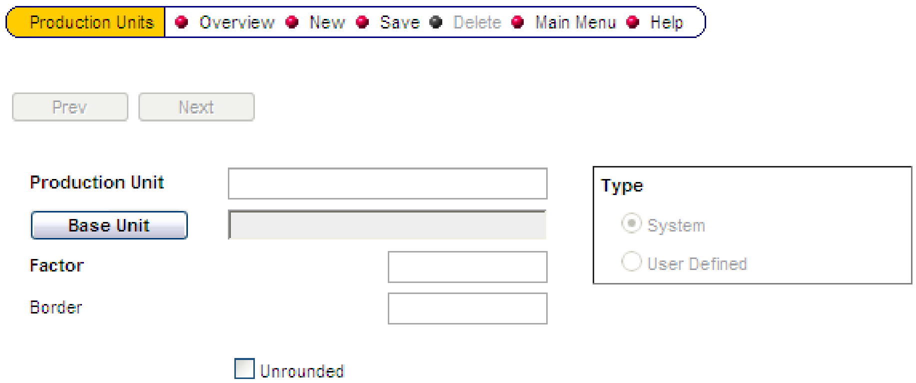
Information Bar

Menu Item	Description
Production Unit	Displays the name of the Production Unit
Base Unit	Displays the Base Unit of measurement for the Production Unit
Factor	This number displays the amount of Production Units required to fulfill the Base Unit measurement
Border	Displays the maximum number of decimal places that will be used when the Production Unit measurement is rounded
Unrounded	If this column is checked, then the factors will not be rounded and will be displayed up to the maximum number of decimal places (6)
Type	Displays the type of Production Unit – system or user-defined
Changed By	Displays the name of the User/Role who changed the Production Unit last
At	Shows the date of the last modification to the Production Unit

Create a New Production Units

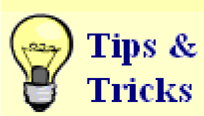
From the Production Units Overview window, you can create new Production Units:

1. Select New from the Top Menu Bar; the Production Units Detail window will appear with blank fields:



2. Enter the name of the Production Unit, the Base Unit, and the Factor (mandatory) and specify the border (optional) and/or unrounded (optional)
3. Click Save

   Your new Production Unit will be saved and available for use.



When creating a Production Unit, keep in mind that all measurements are relative. Factor multiplied by Production Unit should always *equal the Base Unit. For example, if you were creating a Production Unit for a fluid ounce, the Base Unit would be a Pint and the Factor would be 16, since 16 ounces are in one Pint.*

Production Units Detail Window

From the Production Units Detail window, you can modify existing Production Units. The following section describes the elements contained in the Production Units Detail window.

Top Menu Bar

Menu Item	Description
Overview	Go to the Overview area
New	Create a new Production Unit
Save	Save updates to a recently created/modified Production Unit
Delete	Deletes a Production Unit

Menu Item	Description
Main Menu	Return to the Main myinventory Menu
Help	Launch the Help file

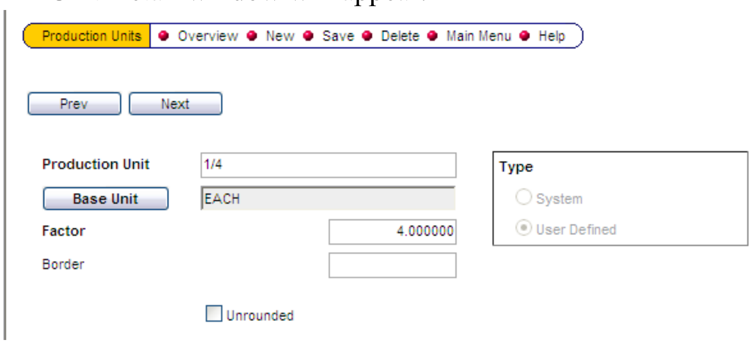
Additional Screen Elements

Screen Element	Description
Previous	View the previous entry in the Production Unit list
Next	View the next entry in the Production Unit list

Modify a Production Unit

From the Production Units Overview window, you can modify existing Production Units:

1. Select a Production Unit from the list; the screen will refresh and the Production Unit Detail window will appear:



2. Modify the fields as necessary
3. Click Save

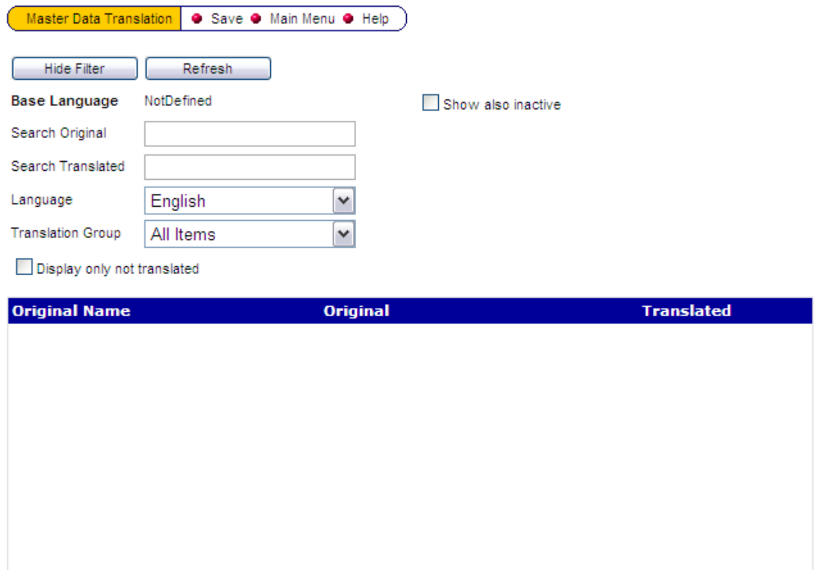
The Production Unit will be updated as per your modifications.

Master Data Translation

Master Data Translation is where organizations can translate Items, Units, ect., for Users which use a different default language. This is useful for organizations that have locations in multiple countries with different languages.

Master Data Translation Overview Window

The first page you see after accessing the Master Data Translation icon is the Master Data Translation Overview window:



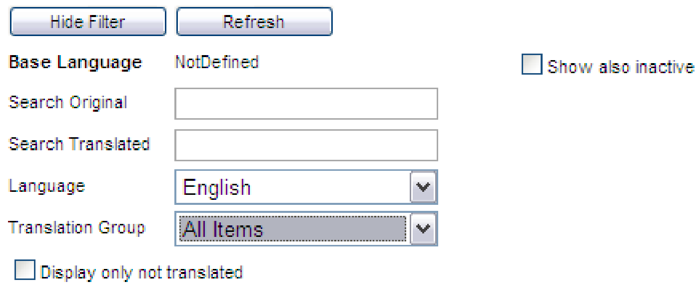
From this window, you can define Translations for different languages and search for previously Translated articles.

The following section describes the elements contained in the Master Data Translation Overview window.

Top Menu Bar

Menu Item	Description
Save	Saves any changes that have been made
Main Menu	Return to the Main myinventory Menu
Help	Launch the Help file

Additional Screen Elements



These filters behave as described in the Welcome section. For more information, please refer to the Screen Layout section of the Welcome page.

Menu Item	Description
Search Original	Allows you to filter for the Original name of an article
Search Translated	Allows you to filter for the Translated name of an article
Language	Select the language that you would like to Translate
Translation Group	Allows you to filter the result set for specific Groups to be Translated
Display only not translated	Allows you to filter for only articles that have not been translated
Show also inactive	Displays inactive articles

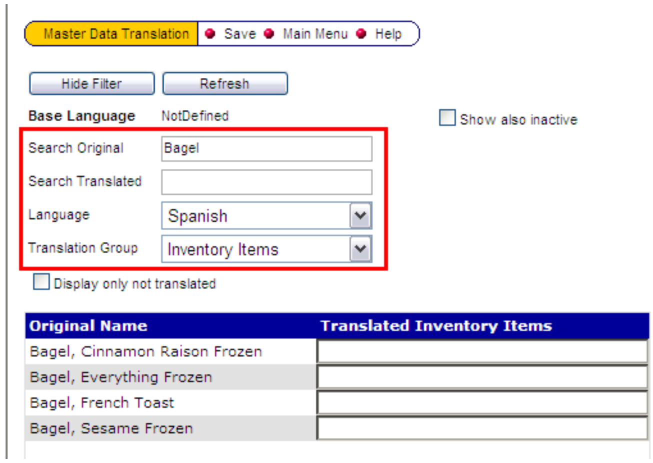
Information Bar

Menu Item	Description
Original Name	Displays the original name in Master Data
Original	Displays any secondary name assigned to the Item, where applicable. This may say Original Order Unit, Original Purchase Item, ect.
Translated	Displays the Translated name

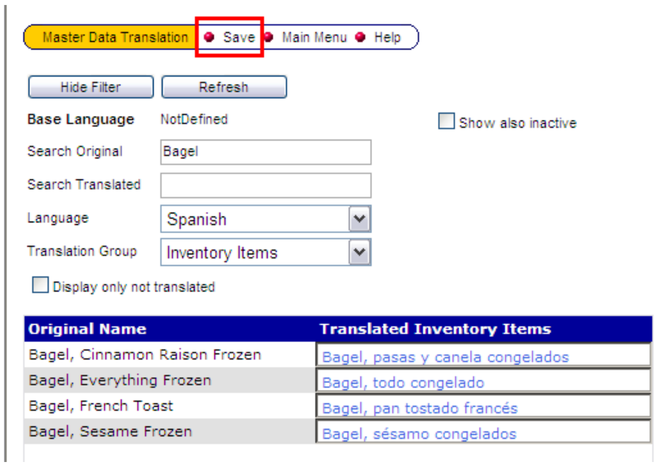
Translating Master Data Articles

To translate articles in Master Data:

1. Select the language that the Translation will be assigned to from the Language drop down and define any other filters to narrow the search of articles; select Refresh to view the results:



2. Enter your Item Translation and click Save:



3. The Translated Items will be displayed as such for Users with the indicated language as their default language.

Recipe Groups

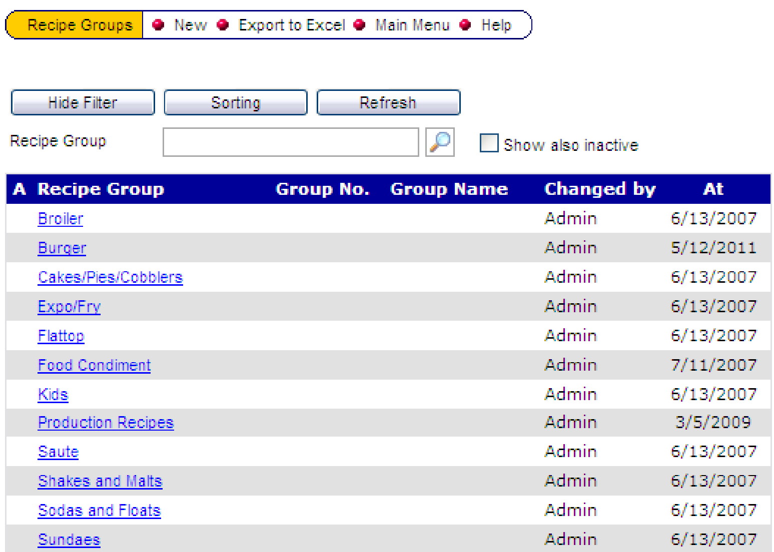
Introduction and Overview

Recipe Groups are used to categorize Recipes. You can create Recipe Groups that best suit the needs of your organization. Typical Recipe Groups include, but are not limited to, appetizers, salads, sandwiches, entrees, steamed items, seafood etc. Organizations can organize their Recipes based on other criteria, like breakfast, lunch, and dinner. These Recipe Groups can vary greatly, depending on what type of establishment is using them. For example, a coffee bar may have Recipe Groups like espresso drinks and baked goods, whereas a bar might have Recipe Groups like vodka drinks, rum drinks, gin drinks, etc.

Therefore, when creating Recipe Groups, be sure to take the restaurant's overall theme and Items served into account.

Recipe Groups Overview Window

The first page you see after accessing the Recipe Over Groups icon or selecting Recipe Group from beneath the Master Data sub-task, is the Recipe Over Groups Overview window:



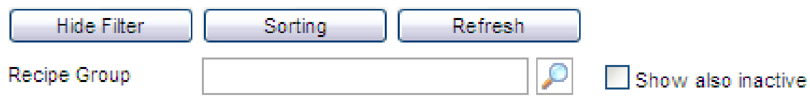
A	Recipe Group	Group No.	Group Name	Changed by	At
	Broiler			Admin	6/13/2007
	Burger			Admin	5/12/2011
	Cakes/Pies/Cobblers			Admin	6/13/2007
	Expo/Fry			Admin	6/13/2007
	Flattop			Admin	6/13/2007
	Food Condiment			Admin	7/11/2007
	Kids			Admin	6/13/2007
	Production Recipes			Admin	3/5/2009
	Saute			Admin	6/13/2007
	Shakes and Malts			Admin	6/13/2007
	Sodas and Floats			Admin	6/13/2007
	Sundaes			Admin	6/13/2007

From this window you will be able to review and modify existing Recipe Groups, as well as create new Recipe Groups as needed.

Top Menu Bar

Menu Item	Description
New	Create a new Recipe Over Group
Export to Excel	Opens the current information into an Excel spreadsheet
Main Menu	Return to the Main myinventory Menu
Help	Launch the Help file

Additional Screen Elements



These filters behave as described in the Welcome section. For more information, please refer to the Screen Layout section of the Welcome page.

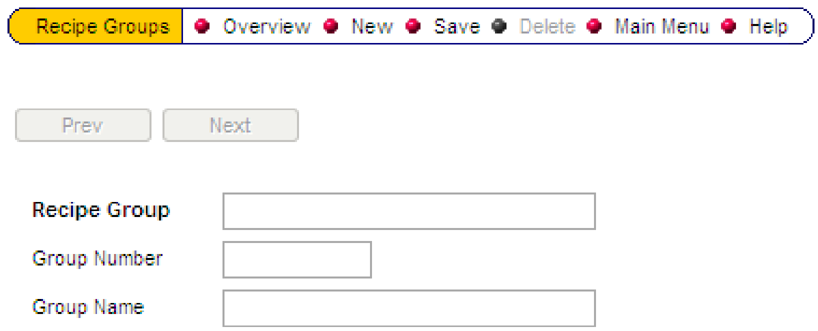
Information Bar

Menu Item	Description
Recipe Group	Displays the name of the Recipe Group
Group No	Displays the Group number
Group Name	Displays the Group name
Changed By	Shows the last User/Role to change the Recipe Group
At	Displays the date of the last change to the Recipe Group

Create a New Recipe Group

From the Recipe Groups Overview window, you can create a new Recipe Group:

1. Select New from the Top Menu Bar; the Recipe Groups Detail window will appear with blank fields:



2. Enter the Recipe Group name (mandatory) and the Group Number (optional) and Group Name (optional)
3. Click Save

Click Overview from the Top Menu Bar to return to the Recipe Overview window; the new Recipe Group will be displayed.

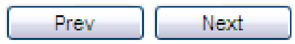
Recipe Groups Detail Window

From the Recipe Groups Detail window, you can modify existing Recipe Groups. The following section describes the elements contained in the Recipe Groups Detail window.

Top Menu Bar

Menu Item	Description
Overview	Go to the Overview area
New	Create a new Recipe Group
Save	Save updates to a recently created/modified Recipe Group
Delete	Delete a Recipe Group
Main Menu	Return to the Main myinventory Menu
Help	Launch the Help file

Additional Screen Elements

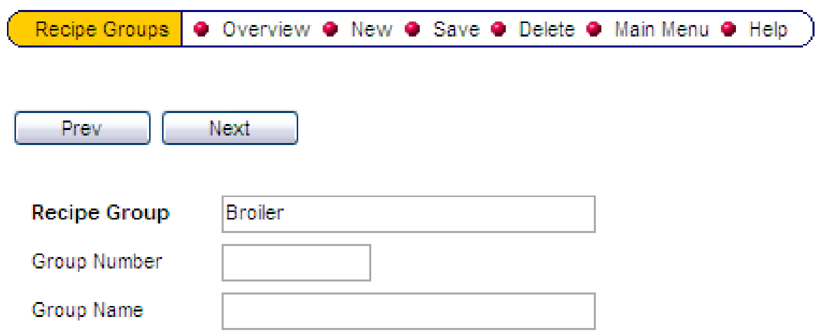


Screen Element	Description
Previous	View the previous entry in the Recipe Group List
Next	View the next entry in the Recipe Group List

Modify a Recipe Groups

From the Recipe Groups Overview window, you can modify Recipe Groups:

1. Select a Recipe Group from the list; the screen will refresh and the Recipe Group Detail window will appear:



2. Modify the name, number, and group name of the Recipe Group
3. Click Save

The Recipe Group will be updated as per your modifications.

Delete a Recipe Groups

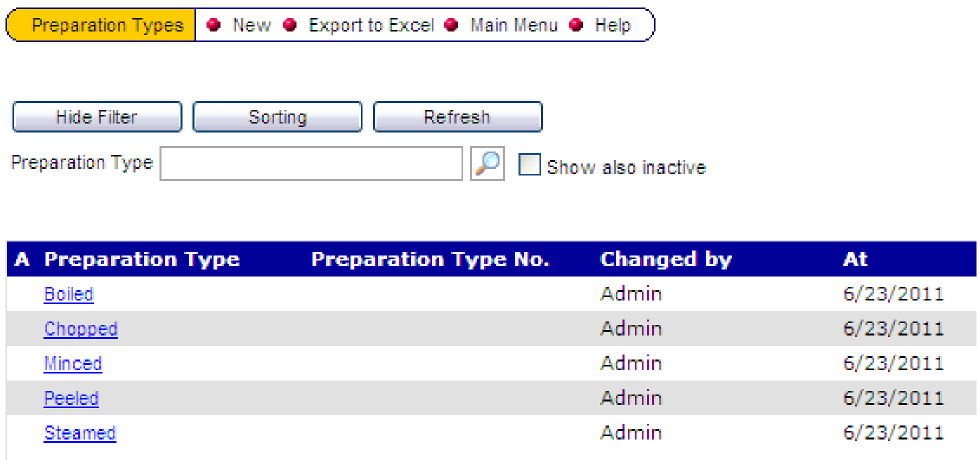
To delete a Recipe Group, please refer to the Deleting a Document section of this document

Preparation Types

Preparation Types are a description of how Ingredients are prepared for use in Recipes. Examples are chopped, minced, steamed, peeled, ect. Defining Preparation Types will add consistency to your organization through the ability to add specificity to each Recipe. Once Preparation Types have been created, you may assign them to Ingredients in the Recipes module, which will ensure that all Cost Centers have the same instructions for preparing food.

Preparation Types Overview Window

The first page you see after accessing the Preparation Types module is the Preparation Types Overview window:



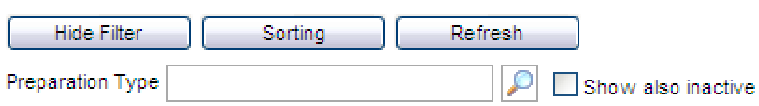
From this window, you can create new and modifying existing Preparation Types.

The following section describes the elements contained in the Preparation Types Overview window.

Top Menu Bar

Menu Item	Description
New	Create a new Preparation Type
Export to Excel	Opens the current information into an Excel spreadsheet
Main Menu	Return to the Main myinventory Menu
Help	Launch the Help file

Additional Screen Elements

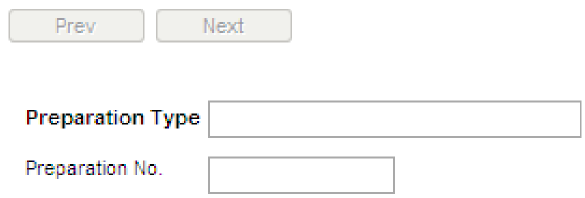


These filters behave as described in the Welcome section. For more information, please refer to the Screen Layout section of the Welcome page.

Create a new Preparation Type

From the Preparation Types Overview window, you can create a new Preparation Type.

1. Select New from the Top Menu Bar; the Preparation Types Detail window will appear with blank fields:



2. Enter a name for the Preparation Type, and a number if necessary
3. Select Save

Your new Preparation Type will be available for use.

Preparation Types Detail Window

From the Preparation Types Detail window, you can modify existing Preparation Types. The following section describes the elements contained in the Preparation Types Detail window.

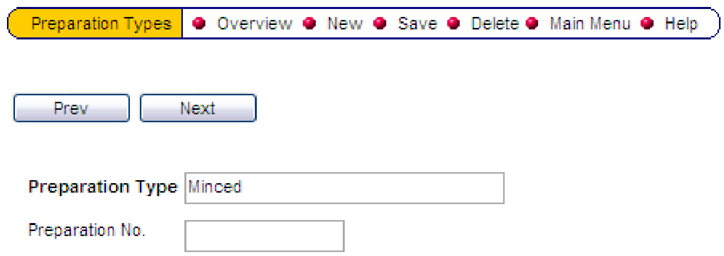
Top Menu Bar

Menu Item	Description
Overview	Go to the Overview area
New	Create a new Preparation Type
Save	Save updates to a recently created/modified Preparation Type
Delete	Delete a Preparation Type
Main Menu	Return to the Main myinventory Menu
Help	Launch the Help file

Modify a Preparation Type

From the Preparation Types Overview window, you can modify a Preparation Type:

1. Select a Preparation Type from the list; the screen will refresh and the Preparation Types Detail window will appear:



2. Modify the name or the number of the Preparation Type
3. Click Save

The Preparation Type will be updated as per your modifications.

Delete a Preparation Type

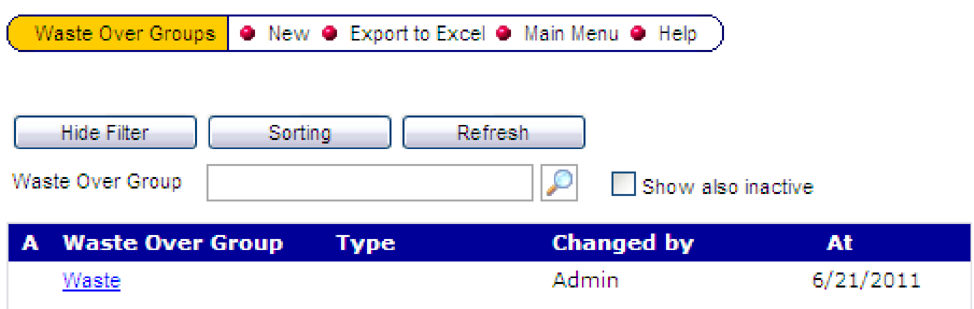
To delete a Preparation Type, please refer to the Deleting a Document section of this document.

Waste Over Groups

Waste Over Groups are a means of organizing information in more Detail for reporting purposes. All Waste Groups must belong to a Waste Over Group

Waste Over Groups Overview Window

The first page you see after accessing the Waste Over Groups module is the Waste Over Groups Overview window:



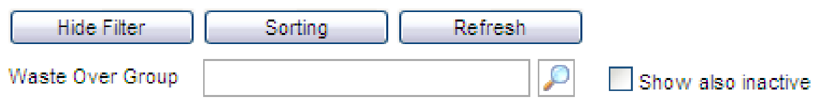
From this window, you can review existing Waste Over Groups and create new ones.

The following section describes the elements contained in the Waste Over Groups Overview window.

Top Menu Bar

Menu Item	Description
New	Create a new Waste Over Group
Export to Excel	Opens the current information into an Excel spreadsheet
Main Menu	Return to the Main myinventory Menu
Help	Launch the Help file

Additional Screen Elements



These filters behave as described in the Welcome section. For more information, please refer to the Screen Layout section of the Welcome page.

Create a New Waste Over Group

From the Waste Over Groups Overview window, you can create a new Waste Over Group.

1. Select New from the Top Menu Bar; the Waste Over Groups Detail window will appear with blank fields:

2. Enter the name of the Waste Over Group

Tips & Tricks

MICROS recommends creating only 1 Waste Over Group. This Over Group does not appear in any reports.

3. Click Save

   Your new Waste Over Group will be saved and available for use.

Waste Over Groups Detail Window

From the Waste Over Groups Detail window, you can modify existing Waste Over Groups. The following section describes the elements contained in the Waste Over Groups Detail window.

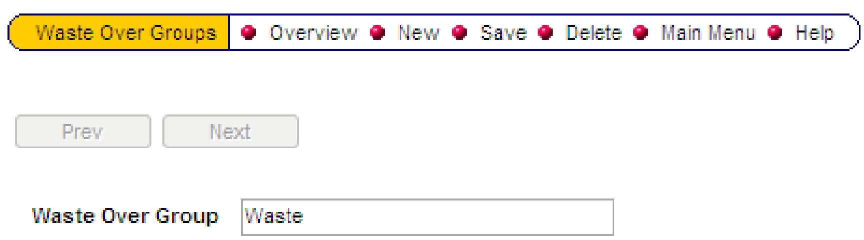
Top Menu Bar

Menu Item	Description
Overview	Go to the Overview area
New	Create a new Waste Over group
Save	Save updates to a recently created/modified Waste Over Group
Delete	Delete a Waste Over Group
Main Menu	Return to the Main myinventory Menu
Help	Launch the Help file

Modify a Waste Over Group

From the Waste Over Groups Overview window, you can modify a Waste Over Group:

1. Select a Waste Over Group from the list; the screen will refresh and the Waste Over Groups Detail window will appear:



2. Modify the name of the Waste Over Group
3. Click Save

The Waste Over Group will be updated as per your modifications.

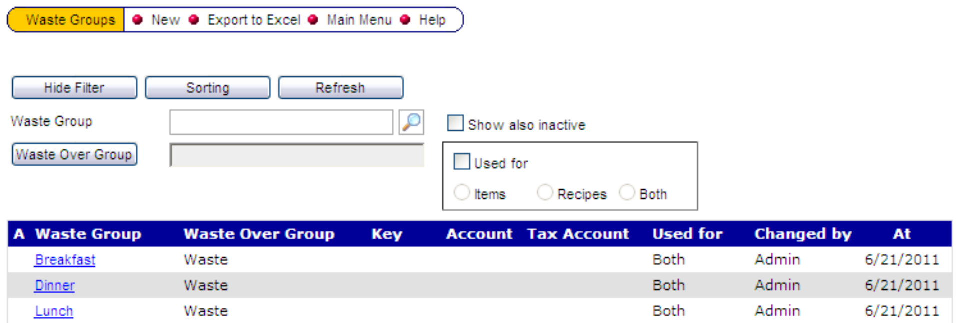
Delete a Waste Over Group

To delete a Waste Over Group, please refer to the Deleting a Document section of this document.

Waste Groups

Waste Groups Overview Window

The first page you see after accessing the Waste Groups icon or selecting Waste Groups from the Master Data sub-task, is the Waste Groups Overview window:

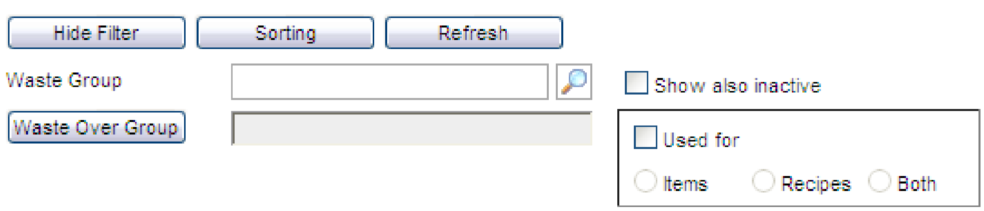


You will be able to create and modify Waste Groups from this module. The following section describes the elements contained in the Waste Groups Overview window.

Top Menu Bar

Menu Item	Description
New	Create a new Waste Group
Export to Excel	Opens the current information into an Excel spreadsheet
Main Menu	Return to the Main myinventory Menu
Help	Launch the Help file

Additional Screen Elements



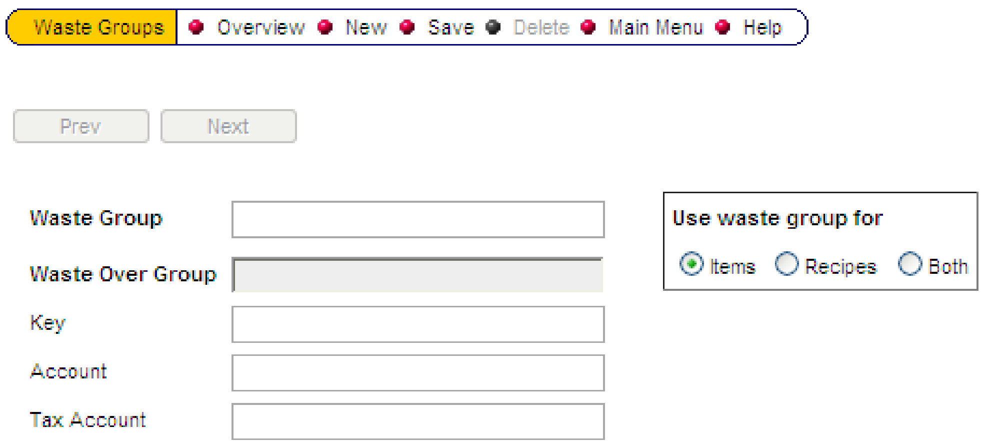
These filters behave as described in the Welcome section. For more information, please refer to the Screen Layout section of the Welcome page.

Create a New Waste Group

> **Tips & Tricks**
> *If you intend to report off of Waste, then it is recommended to enter Waste Groups by reason; for example "Broken", "Spoiled", "Incorrectly Ordered", "Overcooked", etc.*

From the Waste Groups Overview window, you can create a new Waste Group

1. Select New from the Top Menu Bar; the Waste Groups Detail window will appear with blank fields:



2. Enter the name of the Waste Group
3. Enter the Waste Over Group
4. Identify the Waste Group (Items, Recipe, Both). When the Waste Group is used for Items, you will be unable to add Recipes to the Waste document. When the Group is used for Recipes, you will be unable to add Items to the Waste Document.
5. Enter Key, Account, and Tax Account information (optional)
6. Click Save

Your new Waste Group will be saved and available for use.

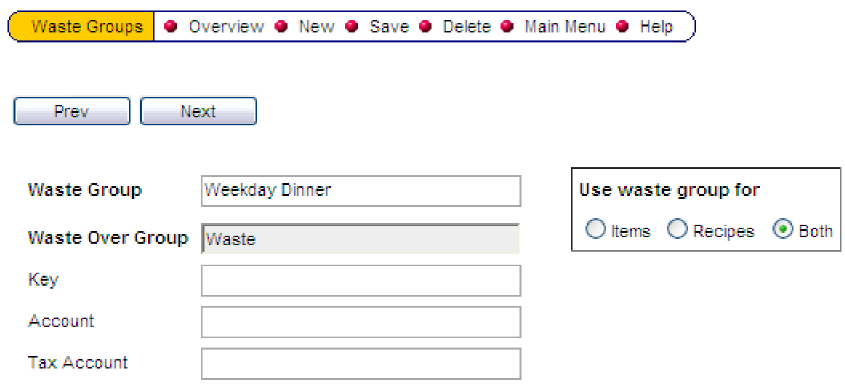
Waste Groups Detail Window

The following section describes the elements contained in the Waste Groups Detail window.

Top Menu Bar

Menu Item	Description
Overview	Go to the Overview area
New	Create a new Waste Group
Save	Save updates to a recently created/modified Waste Group
Delete	Delete a Waste Group
Main Menu	Return to the Main myinventory Menu
Help	Launch the Help file

Additional Screen Elements



Screen Element	Description
Previous	View the previous entry in the Waste Groups list
Next	View the next entry in the Waste Groups list
Key	Key for GL or A/P purposes
Account	Account for GL or A/P purposes
Tax Account	This is for A/P exports; certain taxes might need to be applied to certain accounts.
Use waste group for	There are 3 ways by which you can apply a Waste Definition: 1. Items 2. Recipes 3. Both

Modify a Waste Group

From the Waste Groups Overview window, you can modify existing Waste Groups:

1. Select a Waste Groups from the list; the screen will refresh and the Waste Groups Detail window will appear:
2. Modify the fields as necessary
3. Click Save

The Waste Group will be updated as per your modifications.

Delete a Waste Group

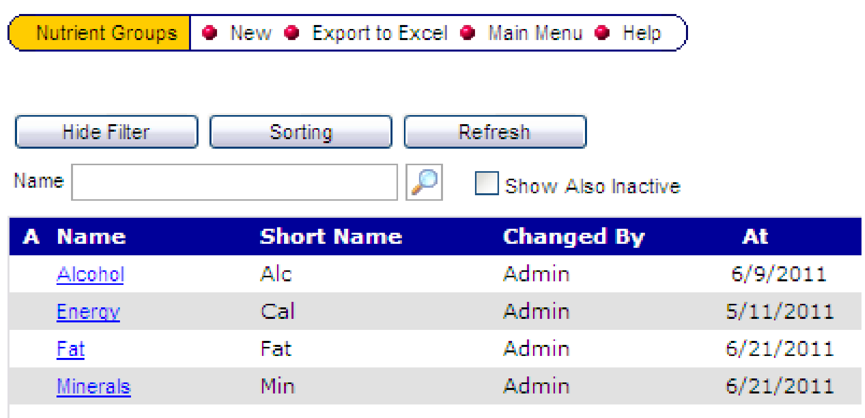
To delete a Waste Group, please refer to Deleting a Document.

Nutrient Groups

Nutrient Groups are a way to categorize Nutrients for better clarity when reading data. Examples of Nutrients Groups are Energy, Fat and Minerals. Nutrients must be assigned to a Nutrient Group, therefore, at least one Group must be configured in the Nutrient Groups module.

Nutrient Groups Overview Window

The first page you see after selecting the Nutrient Groups icon is the Overview window:

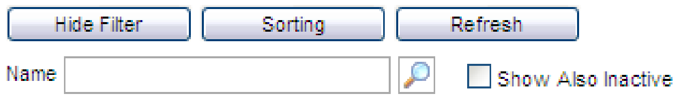


You will be able to create new and modify existing Nutrient Groups from this window. The following section describes the elements contained in the Nutrient Groups Overview window.

Top Menu Bar

Menu Item	Description
New	Create a new Nutrient Group
Export to Excel	Opens the current information into an Excel spreadsheet
Main Menu	Return to the Main myinventory Menu
Help	Launch the Help file

Additional Screen Elements

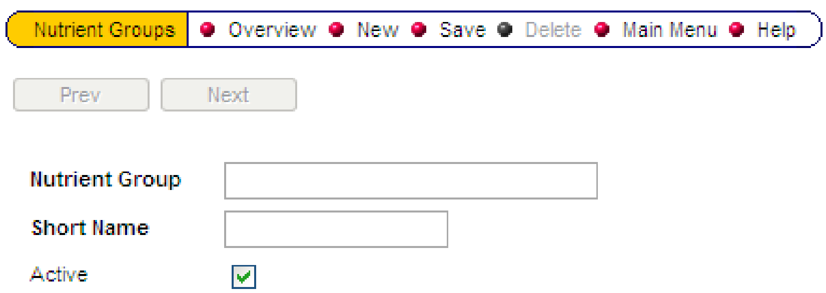


These filters behave as described in the Welcome section. For more information, please refer to the Screen Layout section of the Welcome page.

Create a new Nutrient Group

From the Nutrient Groups Overview window, you can create a new Nutrient Group:

1. Select New from the Top Menu Bar; the Nutrient Groups Detail window will appear with blank fields:



2. Enter a name for the Nutrient Group and a Short Name, which will serve as the abbreviated display name in other Modules
3. Select Save

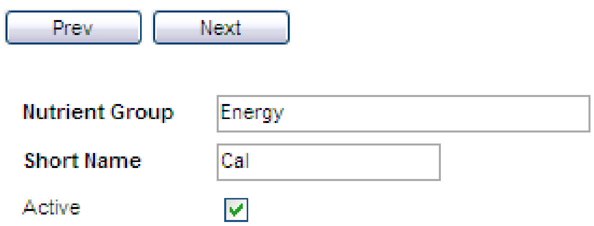
Your new Nutrient Group will be saved and available for use.

Nutrient Groups Detail Window

The following section describes the elements contained in the Nutrient Groups Detail window.

Top Menu Bar

Menu Item	Description
Overview	Go to the Overview area
New	Create a new Nutrient Group
Save	Save updates to a recently created/modified Nutrient Group
Delete	Delete a Nutrient Group
Main Menu	Return to the Main myinventory Menu
Help	Launch the Help file



Menu Item	Description
Prev	View the previous entry in the Nutrient Groups list
Next	View the next entry in the Nutrient Groups list
Nutrient Group	Displays the name of the Nutrient Group
Short Name	Displays the abbreviation for the Nutrient Group
Active	Indicates if the Nutrient Group is Active

Modify an existing Nutrient Group

From the Nutrient Groups Overview window, you can modify an existing Nutrient Group

1. Select a Nutrient Group from the list; the screen will refresh and the Nutrient Group Detail window will appear
2. Modify the fields as necessary
3. Click Save

The Nutrient Group will be updated as per your changes.

Delete a Nutrient Group

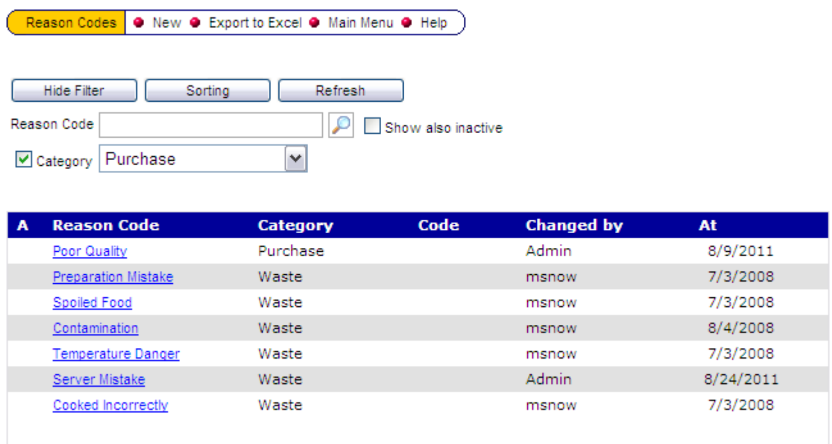
To delete a Nutrient Group, please refer to Deleting a Document.

Reason Codes

Reason Codes are used to categorize Waste and Items Purchased from Vendors which are assigned Vendor Ratings.

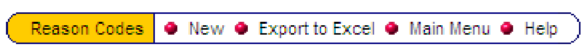
Reason Codes Overview Window

The first page you see after selecting the Reason Codes icon is the Overview Window:



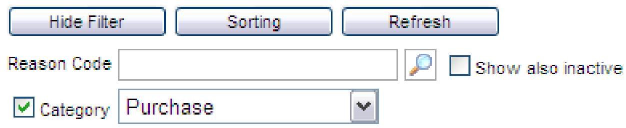
You will be able to create new Reason Codes and modify existing Reason Codes from this window. The following section describes the elements contained in the Reason Codes Overview window.

Top Menu Bar



Menu Item	Description
New	Create a new Reason Code
Export to Excel	Opens the current information into an Excel spreadsheet
Main Menu	Return to the Main myinventory Menu
Help	Launch the Help file

Additional Screen Elements



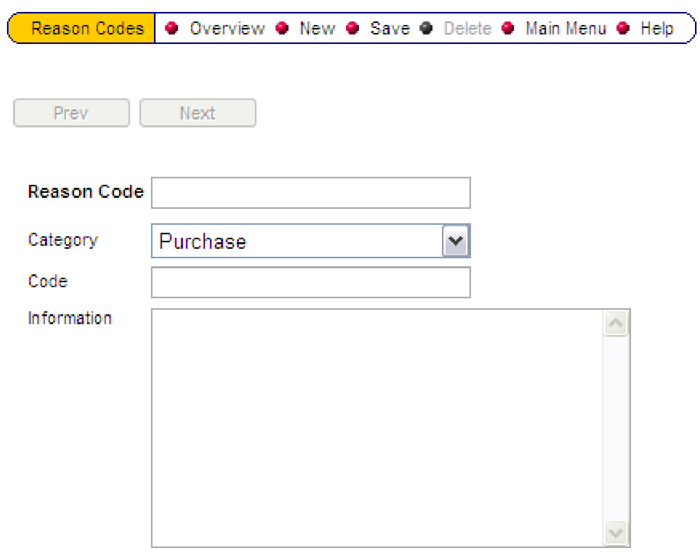
These filters behave as described in the Welcome section. For more information, please refer to the Screen Layout section of the Welcome page.

Menu Item	Description
Category	Enabling this will display the drop down in which you can select what Reason Code Category to display results for
Show also inactive	Displays inactive Reason Codes in the result set

Create a new Reason Code

From the Reason Codes Overview window, you can create a new Reason Code:

1. Select New from the Top Menu Bar; the Reason Codes Detail window will appear with blank fields:



2. Enter the name of the new Reason Code and assign it to a Category Type. (These are mandatory fields)
3. Enter information in any of the remaining fields, as necessary, and select Save

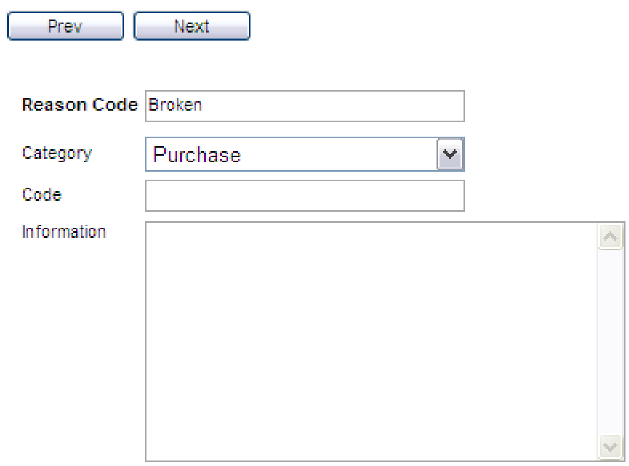
Your new Reason Code will be saved and available for use.

Reason Codes Detail Window

The following section describes the elements contained in the Reason Codes Detail window.

Top Menu Bar

Menu Item	Description
Overview	Go to the Overview area
New	Create a new Reason Code
Save	Save updates to a recently created/modified Reason Code
Delete	Delete a Reason Code
Main Menu	Return to the Main myinventory Menu
Help	Launch the Help file



Menu Item	Description
Prev	View the previous entry in the Reason Codes list
Next	View the next entry in the Reason Codes list
Reason Code	Displays the name of the Reason Code
Category	Displays the Reason Code’s Category
Code	Displays the custom Code for the Reason Code, if necessary
Information	Enter any additional Category information here.

Modify an existing Reason Code

From the Reason Codes Overview window, you can modify an existing Reason Code:

1. Select a Reason Code from the list; the screen will refresh and the Reason Code Detail window will appear
2. Modify the fields as necessary
3. Click Save

The Reason Code will be updated as per your changes.

Delete a Reason Code

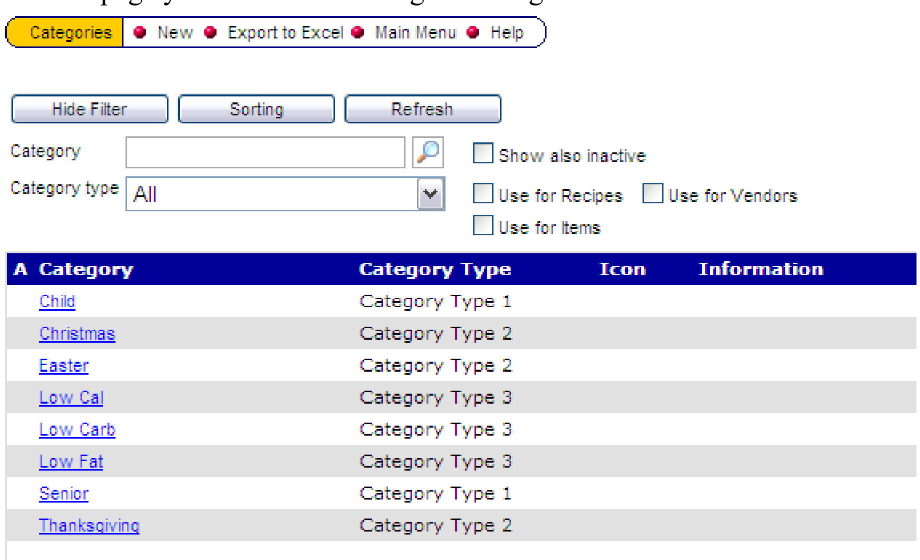
To delete a Reason Code, please refer to Deleting a Document.

Categories

Using Categories throughout myinventory provides an additional method of grouping and searching for data.

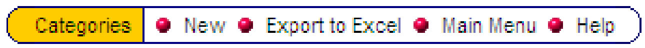
Categories Overview Window

The first page you see after selecting the Categories icon is the Overview window:



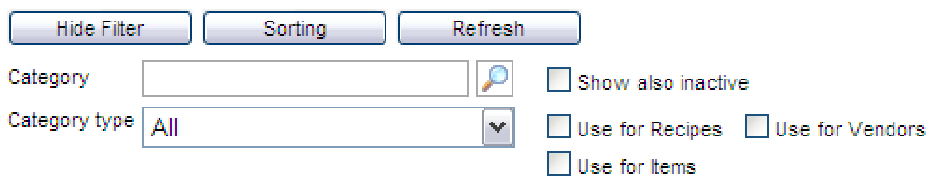
You will be able to create new Categories and modify existing Categories from this window. The following section describes the elements contained in the Categories Overview window.

Top Menu Bar



Menu Item	Description
New	Create a new Category
Export to Excel	Opens the current information into an Excel spreadsheet
Main Menu	Return to the Main myinventory Menu
Help	Launch the Help file

Additional Screen Elements

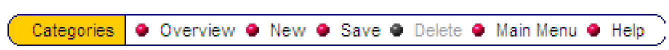


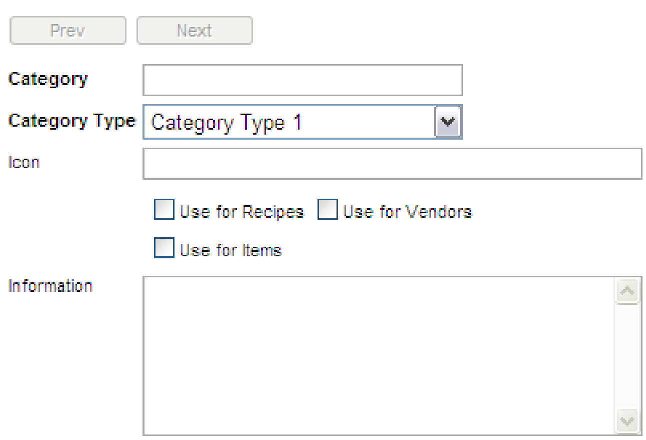
These filters behave as described in the Welcome section. For more information, please refer to the Screen Layout section of the Welcome page.

Create a new Category

From the Categories Overview window, you can create a new Category:

1. Select New from the Top Menu Bar; the Categories Detail window will appear with blank fields:





2. Enter the name of the new Category and assign it to a Category Type. (These are mandatory fields)

3. Enter information in any of the remaining fields, as necessary, and select Save

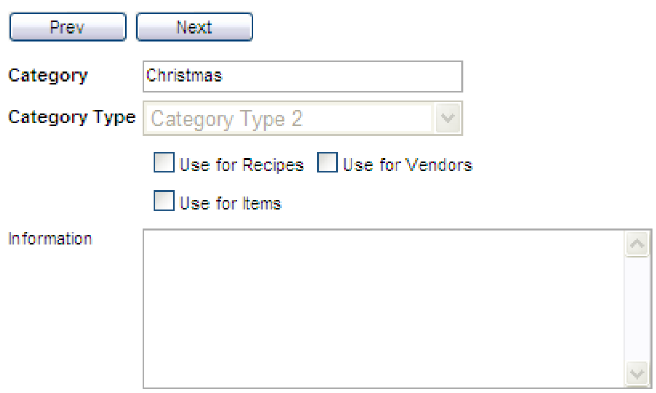
Your new Category will be saved and available for use.

Categories Detail Window

The following section describes the elements contained in the Categories Detail window.

Top Menu Bar

Menu Item	Description
Overview	Go to the Overview area
New	Create a new Category
Save	Save updates to a recently created/modified Category
Delete	Delete a Category
Main Menu	Return to the Main myinventory Menu
Help	Launch the Help file



Menu Item	Description
Prev	View the previous entry in the Categories list
Next	View the next entry in the Categories list
Category	Displays the name of the Category
Category Type	Displays the Type of Category
Use for Recipes	Enables this Category for use in Recipes
Use for Vendors	Enables this Category for use in Vendors

Menu Item	Description
Use for Items	Enables this Category for use in Items
Information	Enter any additional Category information here.

Modify an existing Category

From the Categories Overview window, you can modify an existing Category:

1. Select a Category from the list; the screen will refresh and the Category Detail window will appear
2. Modify the fields as necessary
3. Click Save

The Category will be updated as per your changes.

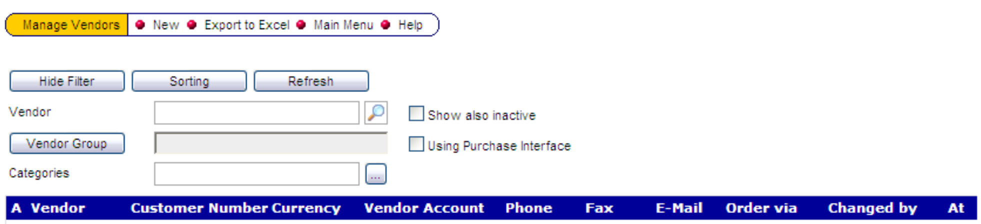
Delete a Category

To delete a Category, please refer to Deleting a Document.

Vendors

Manage Vendors Overview Window

The first page you see after accessing the Vendors module is the Manage Vendors Overview window. In order to see a list of available Vendors, you will have to click Refresh – using the filters may help you narrow down your results.



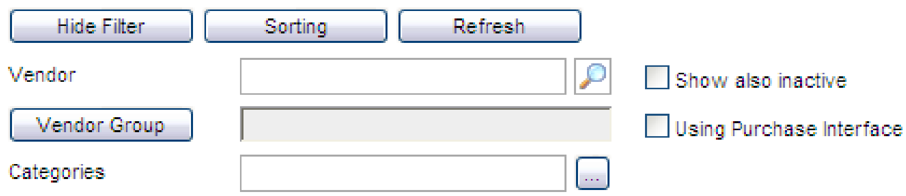
In the Vendors module, you have the ability to create new Vendors, edit existing Vendors, group Vendors together categorically, assign taxes, specify currency, and many more functions.

The following section describes the elements contained in the Manage Vendors Overview window.

Top Menu Bar

Menu Item	Description
New	Create a new Vendor
Export to Excel	Opens the current information into an Excel spreadsheet
Main Menu	Return to the Main myinventory Menu
Help	Launch the Help file

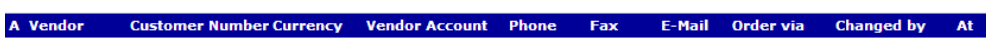
Additional Screen Elements



These filters behave as described in the Welcome section. For more information, please refer to the Screen Layout section of the Welcome page.

Screen Element	Description
Show also inactive	Select this option to include inactive Vendors in your search
Using Purchase Interface	Use this filter if you wish to see Vendors using a Business-to-Business (B2B) interface

Information Bar



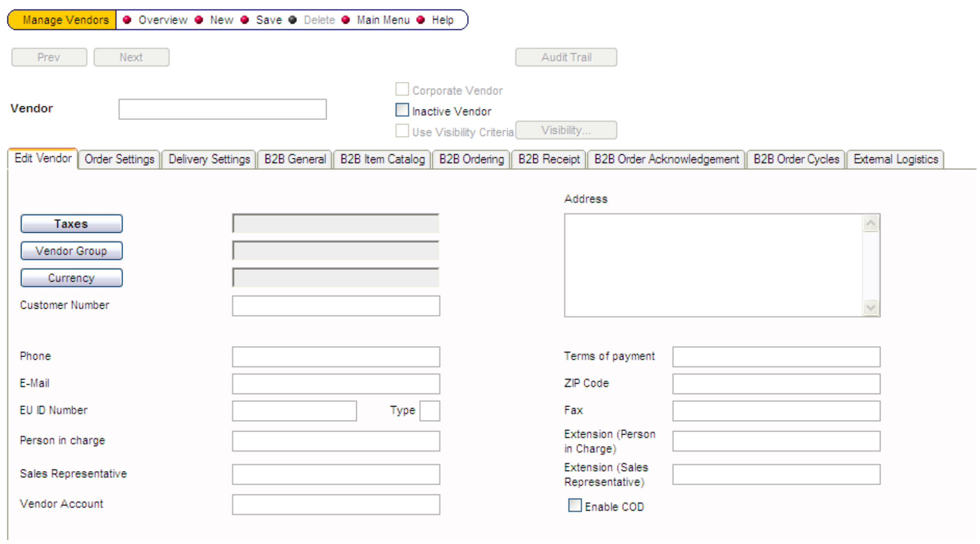
Menu Item	Description
Vendor	Displays the name of the Vendor
Customer Number	Displays the organization’s Customer Number with that Vendor
Currency	Displays the currency that the Vendor uses, if not base currency
Vendor Account	Displays the Vendor account number
Phone	Displays the Vendor’s phone number
Fax	Displays the Vendor’s fax number
E-Mail	Displays the Vendor’s email address

Menu Item	Description
Order Via	Displays the method of Ordering
Changed by	Displays the User that last changed this Vendor's configuration
At	Displays the date that this Vendor was last updated

Create a Vendor

To create a new Vendor:

1. Click New from the Top Menu Bar; the Manage Vendors Detail page will display:



Tips & Tricks

When creating a Vendor with more than one distribution center, create a different Vendor for each distribution center. This is for B2B Purposes, as each distribution center normally has their own order guide.

2. Enter the name of the new Vendor in the Vendor field and the tax information in the corresponding field. These are the only mandatory fields. Enter additional information in any field that is important to your organization.
3. Save

When you return to the Manage Vendors Overview window, the new Vendor will appear in the Vendor list.

The Manage Vendors Detail Window

The following is a description of the Manage Vendors Detail window:

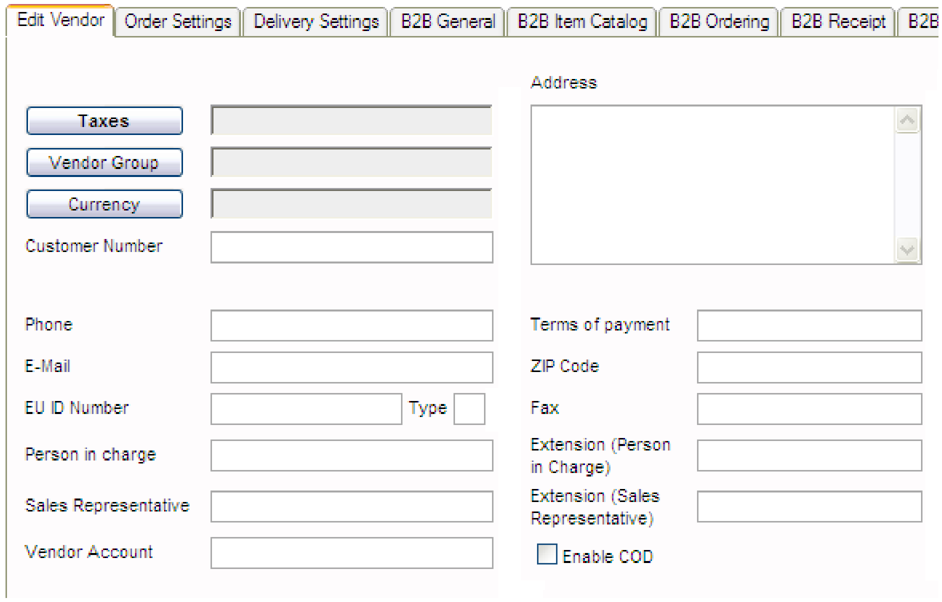
Top Menu Bar

Menu Item	Description
Overview	Go to the Overview screen
New	Create a new Vendor
Save	Save updates to a recently created/modified Vendor
Delete	Delete a Vendor
Main Menu	Return to the Main myinventory Menu
Help	Launch the Help file

Additional Screen Elements

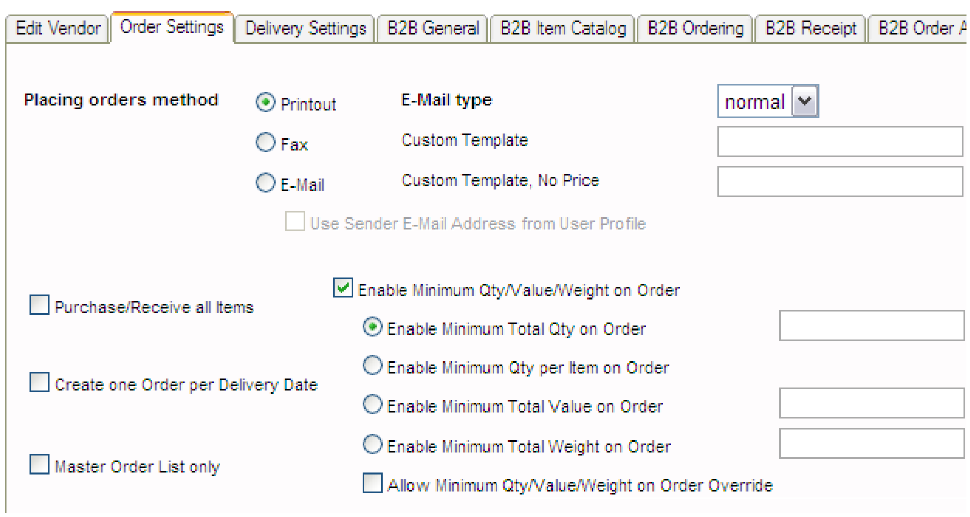
Screen Element	Description
Prev button	View the previous entry in the Vendor list
Next button	View the next entry in the Vendor list
Corporate Vendor	Enable this to allow all Cost Centers the ability to use this Vendor
Inactive Vendor	Enable this to deactivate the Vendor
Use Visibility Criteria	Enable this to define Visibility Criteria for this Vendor
Audit Trail	If Audit Trail is used, selecting this will display the changes that have been made to the Vendor, as well as the User who made them
Visibility	Displays the Visibility Criteria window so that Visibility can be assigned

Edit Vendor Tab



On this tab you can enter information about your Vendor. Specific Details, like who the sales representative is or what the phone numbers are, might be especially helpful. All fields are editable; however, Taxes is a mandatory field.

Order Settings Tab



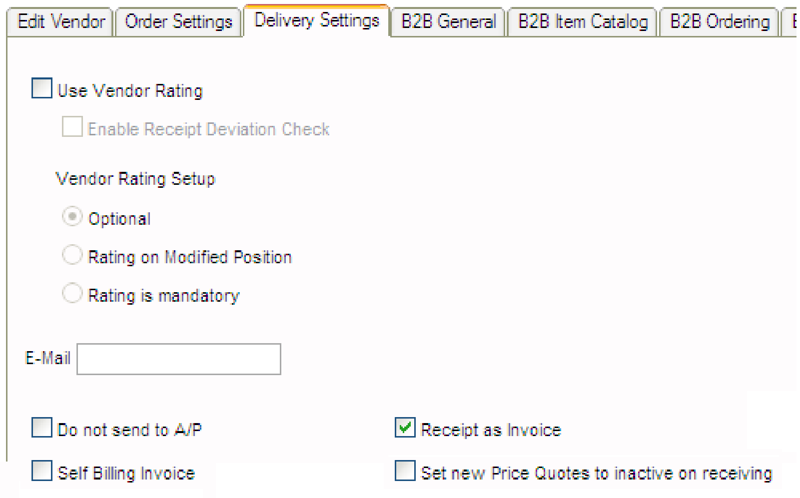
The following fields are editable. Enter as much information as necessary for your organization.

- Placing Order Method – determine how you will place your orders: Printout, Fax, or Email

> **Tips & Tricks**
> *When creating a Vendor for the first time, leave the Place Order Method as print out*

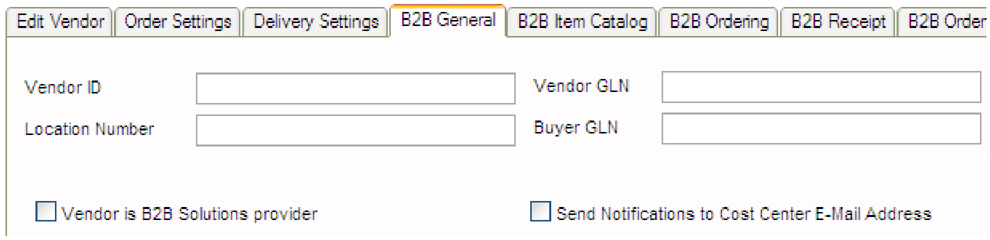
- Purchase/Receive all Items – allows all Items to be Purchased and Received by the Vendor, regardless of an existing Vendor Purchase Item. The User Right Purchase/Receive all Items must also be enabled for this option to function
- Create one Order per Delivery Date – creates a separate Order for each specified delivery date
- Master Order List only – if enabled, Orders can only be placed for this Vendor by using a Master Order List
- E-Mail Type – select the format for your emails; choices include normal, ASCII, PDF, HTML, or XML.
- Custom Template – if the organization uses a custom Order Template that has been uploaded to the application by MICROS, the file name will be displayed here
- Custom Template, No Price – if the organization uses a custom Order Template that has been uploaded to the application by MICROS, the file name will be displayed here
- Enable Minimum Qty/Value/Weight on Order – use this to enable minimum Order requirements for specific Items or the entire Order
  - Enable Minimum Total Qty on Order – Use for Vendors with an Item Quantity Minimum. Enter the amount in the form of a whole number
  - Enable Minimum Quantity per Item on Order – Use when an Item has a Minimum Quantity that must be Ordered. This is defined in the Vendor Purchase Catalog
  - Enable Minimum Total Value on Order – Use for Vendors with an Order Value Minimum. Enter the amount, up to one decimal place
  - Enable Minimum Total Weight on Order – Use for Vendors with an Order Weight Minimum. Enter the weight, up to one decimal place
- Allow Minimum Qty/Value/Weight on Order Override – Allows a privileged User the ability to book an Order that does not meet minimum requirements

Delivery Settings Tab



- Use Vendor Rating - this is a way for an organization to apply a “rating”, such as which Vendor is considered “better” than another. By enabling Use Vendor Rating, the Vendor Rating Setup options become available.
- Vendor Rating - Select the appropriate setting for your organization. This is used for Receiving QTY and Price variances between Ordering and Receiving.
  - Optional – the User may enter a reason for differences, if desired
  - Rating on Modified Position – the User is required to select a reason for all Items where the QTY or Price have changed
  - Rating is Mandatory – the User is required to enter information for everything Received from this Vendor. The Receipt may not be booked until all mandatory information is completed
- E-Mail - Enter the E-mail address of the Vendor
- Do not sent to A/P – enable this if you do not wish to have your orders sent to Accounts Payable (A/P)
- Receipt as Invoice – enable this feature if your Receipt will function as your Invoice, i.e. if you Receive by Invoice rather than by a packing slip
- Self Billing Invoice – this option is not used by myinventory
- Set new Price Quotes to inactive on receiving – enable this to use a Price Quote one time and then retire it

B2B General



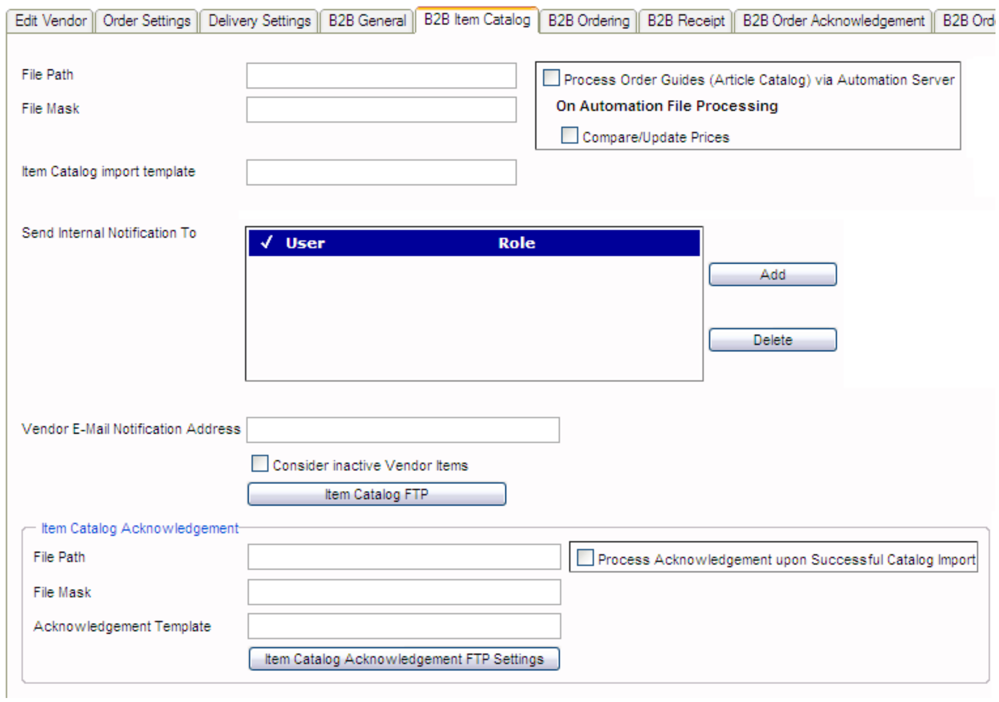
The following fields are editable. Enter as much information as necessary:

- Vendor ID – Supplied by the Vendor
- Location Number – Supplied by the Vendor; optional
- Vendor GLN – Supplied by the Vendor; optional
- Buyer GLN – User defined, unless controlled by jurisdiction; required
- Vendor is B2B Solutions provider – this Vendor is able to send Receipts back to the B2B; not used by myinventory
- Send Notifications to Cost Center E-Mail Address – This will send an email to the Cost Center instead of the originator of the document. Used for Orders only

Tips & Tricks

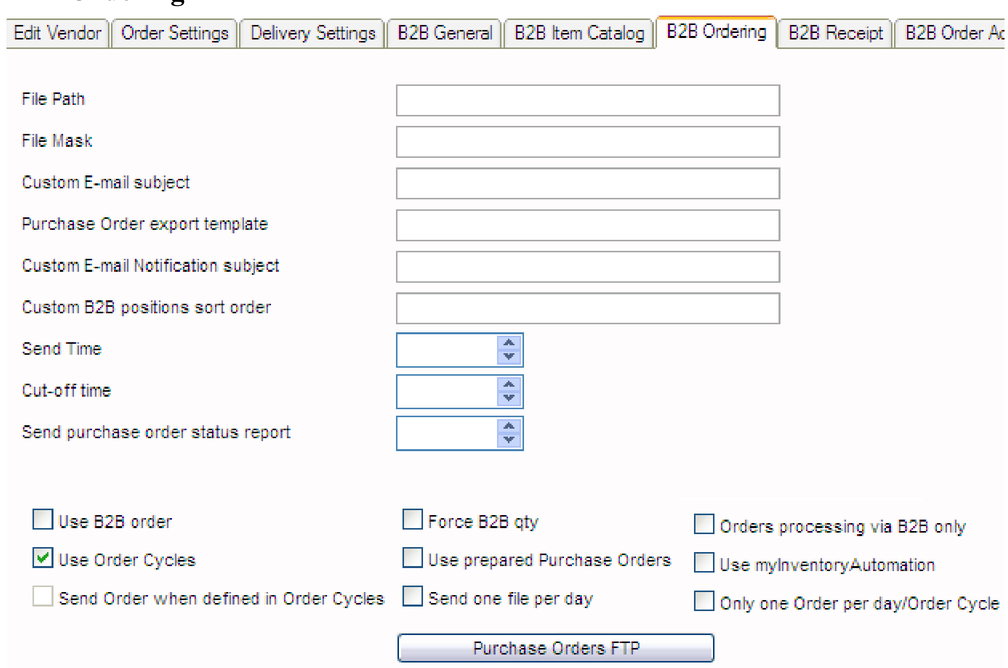
Any B2B Settings should be left blank until it is determined which B2B Interface is needed. MICROS will perform the initial configuration in these fields.

B2B Item Catalog



All fields are available to be edited and should be configured by MICROS.

B2B Ordering



All fields are available to be edited.

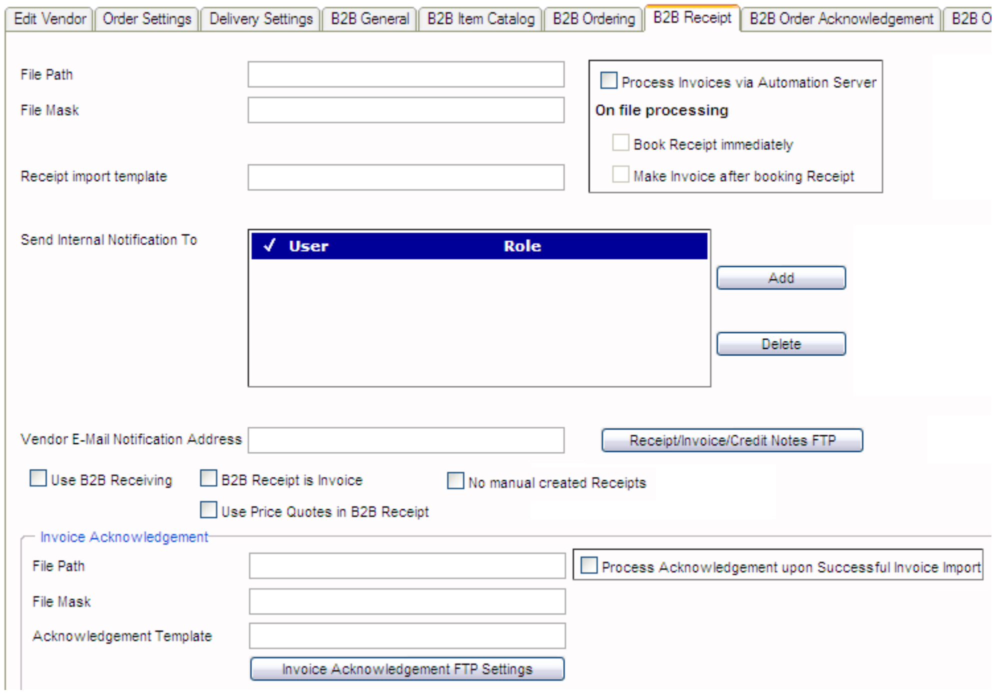
You may enable the following options:

- Use B2B order – This Vendor is able to use B2B Ordering methods
- Use Order Cycles - enabling this means the selected Vendor will adhere to established Order Cycles.
- Force B2B qty – enabling this function means that Cost Centers will be unable to change the quantities on the Receipts that come from the Vendor.
- Use prepared Purchase Orders – enable this function to make Prepared Purchase Order as the basis of an Order
- Send one file per day – one Order will be filed with this specific Vendor once a day; if 15 different Cost Centers are all using the same Vendor, then it may be better for organization to have 1 Order with all 15 Cost Centers Orders included sent to that Vendor.
- Order processing via B2B only – this feature will ensure Users cannot create a new Order or have anything sent/added/removed from that Vendor without going through B2B
- Use myinventory Automation – enabling this function will give myinventory the ability to search for, submit, and Order via B2B automatically.
- Only one Order per day/Order Cycle – Only one Order per day/Order Cycle may be submitted for the Vendor, Cost Center, and Delivery Date.

Tips & Tricks

Any B2B Settings should be left blank until it is determined which B2B Interface is needed. MICROS will perform the initial configuration in these fields.

B2B Receipt



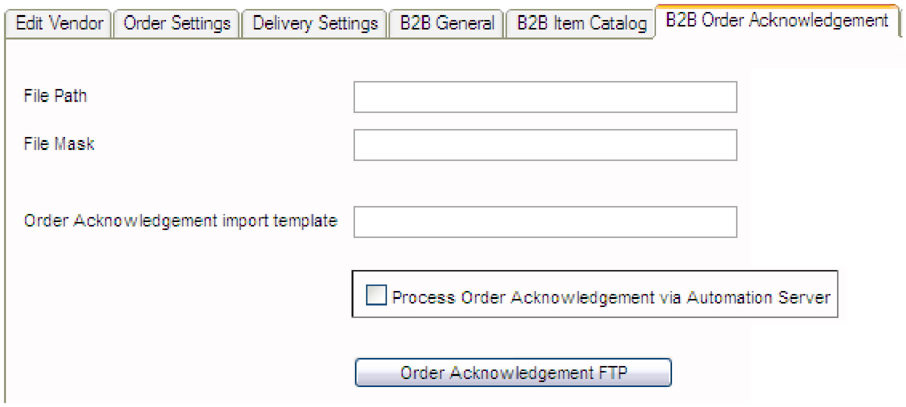
Enable the following options (if necessary):

- Use B2B Receiving – this denotes B2B receiving is used for the Vendor
- B2B Receipt is Invoice – B2B Receipt will act as an Invoice
- Use Price Quotes in B2B Receipt – use the price quotes in your system as opposed to the price quotes being sent back from a Vendor.
- No manual created Receipts – cannot create Receipts, only Receive via B2B

Tips & Tricks

Any B2B Settings should be left blank until it is determined which B2B Interface is needed. MICROS will perform the initial configuration in these fields.

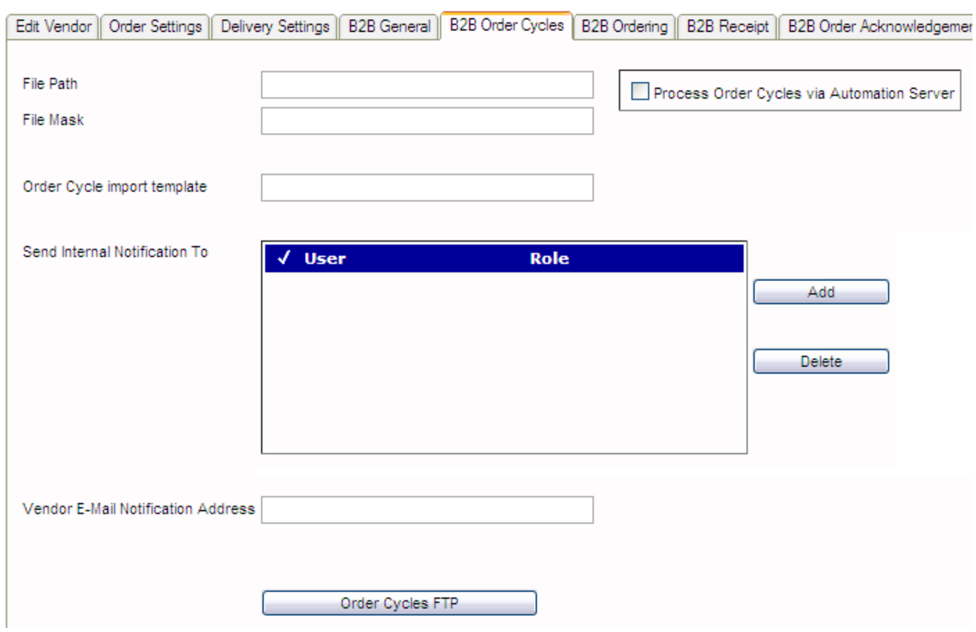
B2B Order Acknowledgement



All fields are editable.

- Process Order Acknowledgement via Automation Server – Enable this to have the MIA2 Scheduler process Order Acknowledgements automatically.

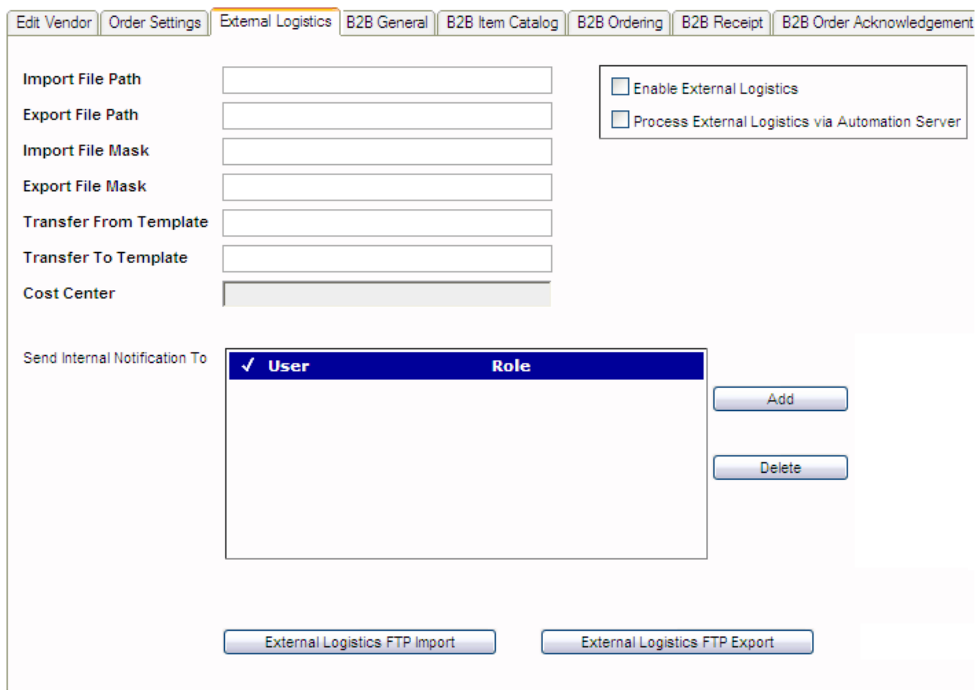
B2B Order Cycles



All fields are available to be edited.

- Process Order Cycles via Automation Server – Enable this to have the MIA2 Scheduler process Order Cycles automatically.

External Logistics



All fields are available to be edited.

- Enable External Logistics – Enable this to allow Users access to the External Logistics module
- Process Order Cycles via Automation Server – Enable this to have the MIA2 Scheduler process External Logistics automatically.

Delete a Vendor

To delete a Vendor, please refer to the Deleting a Document section of this document.

Vendor Groups

Vendor Groups are a way for organizations to categorize Vendors for easier sorting and reporting functionality. The use of Vendor Groups is optional, but can be helpful for large organizations with many Vendors to maintain.

Vendor Groups Overview Window

The first page you see after accessing the Vendor Groups module is the Vendor Groups Overview window:

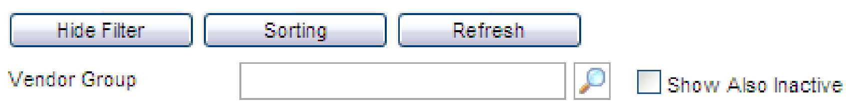
From this window, you can create new Vendor Groups and modify existing ones.

The following section describes the elements contained in the Vendor Groups Overview window.

Top Menu Bar

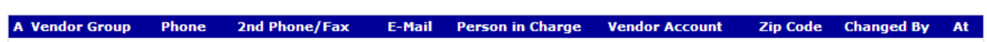
Menu Item	Description
New	Create a new Vendor Group
Export to Excel	Opens the current information into an Excel spreadsheet
Main Menu	Return to the Main myinventory Menu
Help	Launch the Help file

Additional Screen Elements



These filters behave as described in the Welcome section. For more information, please refer to the Screen Layout section of the Welcome page.

Information Bar



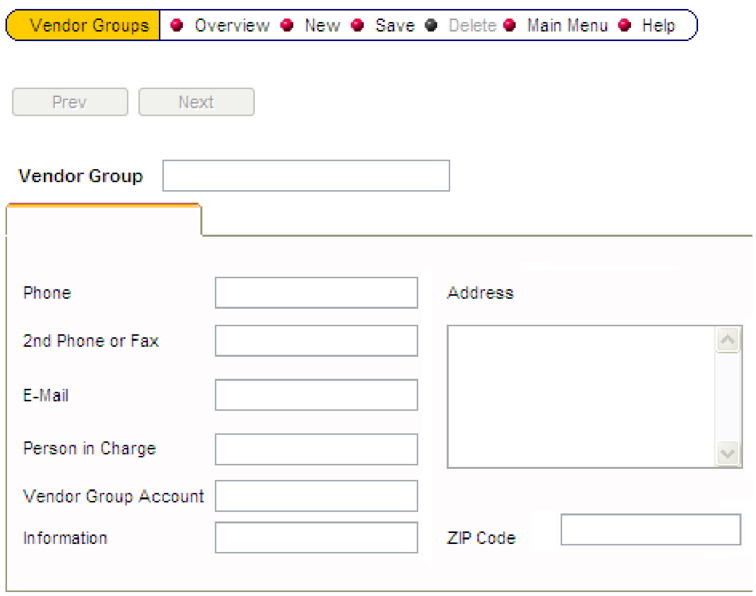
Menu Item	Description
Vendor Group	Displays the name of the Vendor Group
Phone	Displays the Vendor Group’s phone number
2nd Phone/Fax	Displays an additional phone number for the Vendor Group
Email	Displays the Vendor Group’s email address
Person in Charge	Displays the name of the Vendor Group contact

Menu Item	Description
Vendor Account	Displays the Vendor Group Account number
Zip Code	Displays the Vendor Group's Zip Code
Changed by	Displays the User who last modified this Vendor Group
At	Displays the date that the last modification was made

Creating a New Vendor Group

From the Vendor Groups Overview window, you can create a new Vendor Group.

1. Select New from the Top Menu Bar; the Vendor Groups Detail window will appear with blank fields



2. Enter the name of the Vendor Group and any other pertinent information
3. Select Save

Your new Vendor Group will be saved and ready for use.

Vendor Groups Detail Window

From the Vendor Groups Detail window, you can modify existing Vendor Groups. The following section describes the elements contained in the Vendor Groups Detail window.

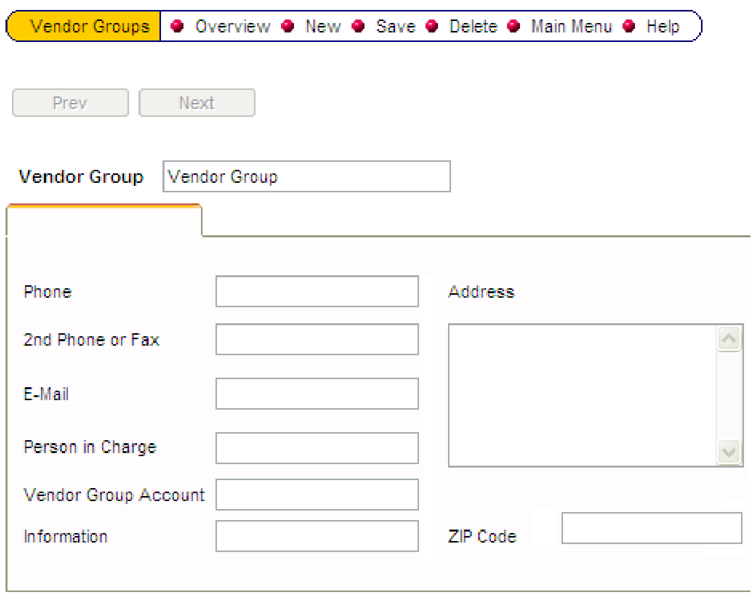
Top Menu Bar

Menu Item	Description
Overview	Go to the Overview area
New	Create a new Vendor Group
Save	Save updates to a recently created/modified Vendor Group
Delete	Delete a Vendor Group
Main Menu	Return to the Main myinventory Menu
Help	Launch the Help file

Modify a Vendor Group

From the Vendor Group Overview window, you can modify existing Vendor Groups.

1. Select a Vendor Group from the list; the screen will refresh and the Vendor Groups Detail window will appear:



2. Edit information as necessary
3. Select Save

The Vendor Group will be saved as per your modifications.

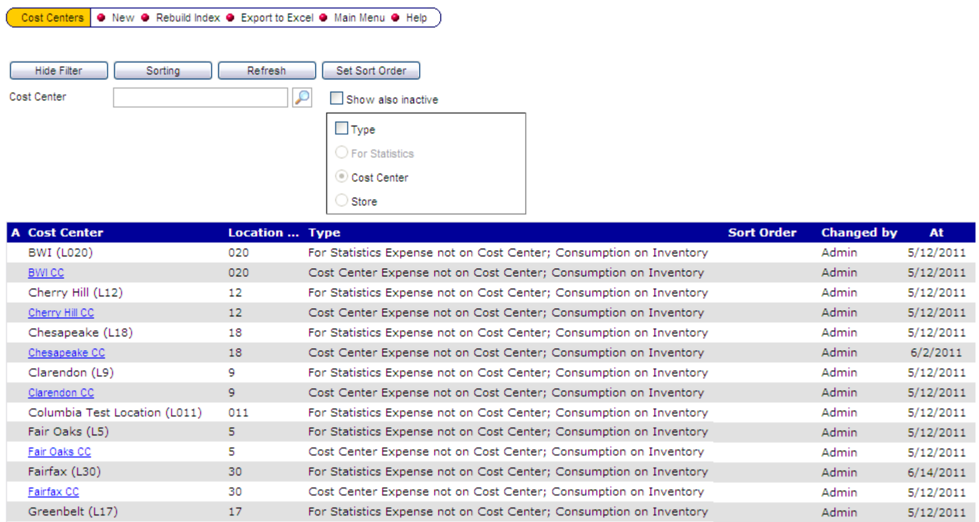
Delete a Vendor Group

To delete a Vendor Group, please refer to the Deleting a Document section of this document.

Cost Centers

Manage Cost Centers Overview Window

The first page you see after accessing the Cost Centers module is the Cost Centers Overview window:



A	Cost Center	Location ...	Type	Sort Order	Changed by	At
	BWI (L020)	020	For Statistics Expense not on Cost Center; Consumption on Inventory		Admin	5/12/2011
	BWI CC	020	Cost Center Expense not on Cost Center; Consumption on Inventory		Admin	5/12/2011
	Cherry Hill (L12)	12	For Statistics Expense not on Cost Center; Consumption on Inventory		Admin	5/12/2011
	Cherry Hill CC	12	Cost Center Expense not on Cost Center; Consumption on Inventory		Admin	5/12/2011
	Chesapeake (L18)	18	For Statistics Expense not on Cost Center; Consumption on Inventory		Admin	5/12/2011
	Chesapeake CC	18	Cost Center Expense not on Cost Center; Consumption on Inventory		Admin	6/2/2011
	Clarendon (L9)	9	For Statistics Expense not on Cost Center; Consumption on Inventory		Admin	5/12/2011
	Clarendon CC	9	Cost Center Expense not on Cost Center; Consumption on Inventory		Admin	5/12/2011
	Columbia Test Location (L011)	011	For Statistics Expense not on Cost Center; Consumption on Inventory		Admin	5/12/2011
	Fair Oaks (L5)	5	For Statistics Expense not on Cost Center; Consumption on Inventory		Admin	5/12/2011
	Fair Oaks CC	5	Cost Center Expense not on Cost Center; Consumption on Inventory		Admin	5/12/2011
	Fairfax (L30)	30	For Statistics Expense not on Cost Center; Consumption on Inventory		Admin	6/14/2011
	Fairfax CC	30	Cost Center Expense not on Cost Center; Consumption on Inventory		Admin	5/12/2011
	Greenbelt (L17)	17	For Statistics Expense not on Cost Center; Consumption on Inventory		Admin	5/12/2011

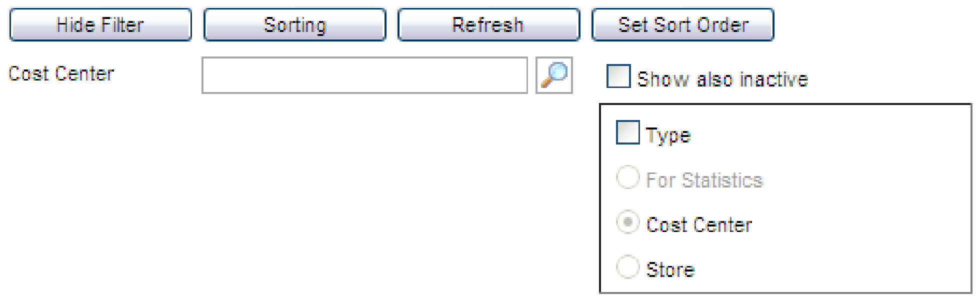
From this window, you can create new Cost Centers and modify existing ones.

The following section describes the elements contained in the Cost Centers Overview window.

Top Menu Bar

Menu Item	Description
New	Create a new Cost Center
Rebuild Index	Selecting this will provide the User the ability to rebuild the Cost Center hierarchy
Export to Excel	Opens the current information into an Excel spreadsheet
Main Menu	Return to the Main myinventory Menu
Help	Launch the Help file

Additional Screen Elements



These filters behave as described in the Welcome section. For more information, please refer to the Screen Layout section of the Welcome page.

Screen Element	Description
Type: ◆ For Statistics ◆ Cost Center ◆ Store	Filter by For Statistics, Cost Center, or Store. You may only filter by one type at a time.

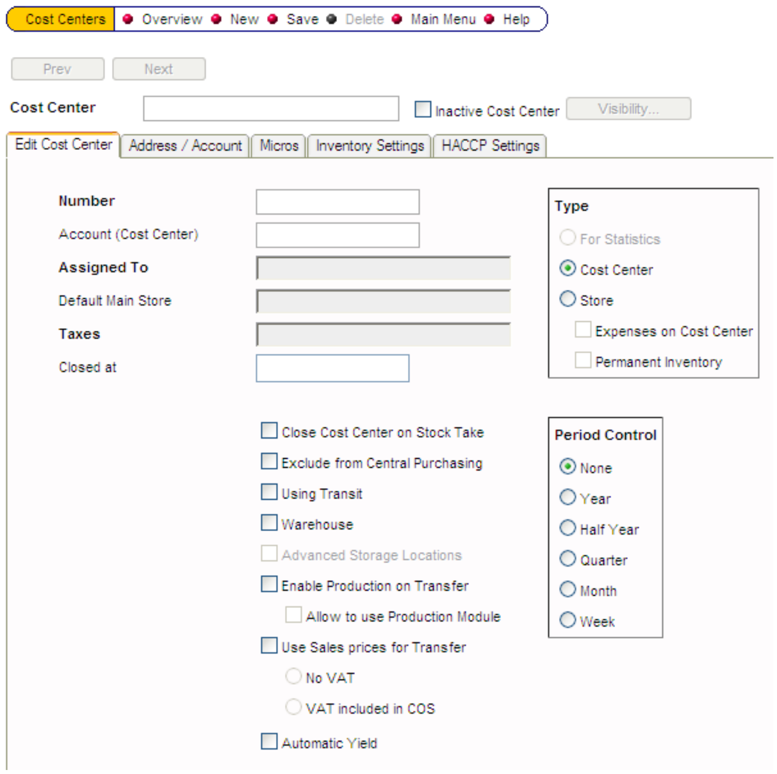
Information Bar

Menu Item	Description
Cost Center	Displays the name of the Cost Center.
Location Reference	Displays the Location Reference number
Type	Displays the type of location for the record
Changed by	Displays the User that last modified this Cost Center
At	Displays the date that the last modification was made

Create a New Cost Center

From the Cost Center Overview window, you can create a new Cost Center.

1. Select New from the Top Menu Bar; the Cost Center Detail window will appear with blank fields:



2. Enter/Modify the fields on the Cost Center Detail page; Cost Center, Number, Assigned To, and Taxes are mandatory fields
3. Click Save; the Cost Center will be saved. If you navigate back to the Cost Center Overview window, you will see your new Cost Center in the Cost Center List.

Cost Center Detail Window

From the Cost Center Detail window, you can modify existing Cost Centers. The following section describes the elements contained in the Cost Center Detail window.

Top Menu Bar

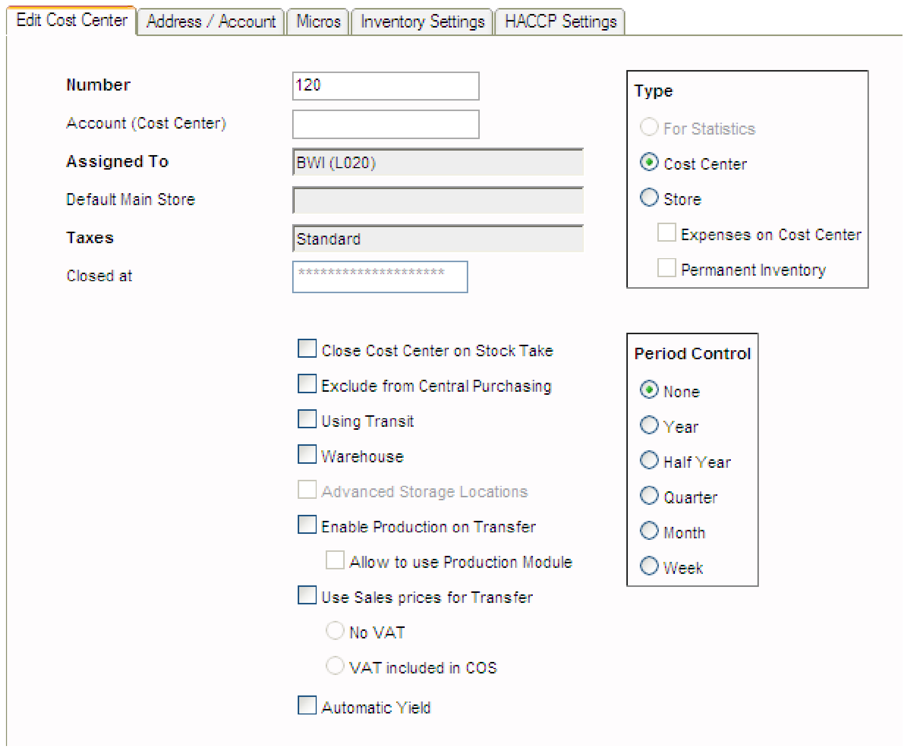
Menu Item	Description
Overview	Go to the Overview area
New	Create a new Cost Center

Menu Item	Description
Save	Save updates to a recently created/modified Cost Center
Delete	Click this button to Delete the Cost Center. If there is a referential integrity violation, then the Cost Center will be deactivated.
Main Menu	Return to the Main myinventory Menu
Help	Launch the Help file

Additional Screen Elements

Screen Element	Description
Previous	View the previous entry in the Cost Center List
Next	View the next entry in the Cost Center List
Inactive Cost Center	Enabling this will deactivate the Cost Center
Visibility	Use this to edit the Visibility Criteria for this Cost Center

Edit Cost Center/Store Tab

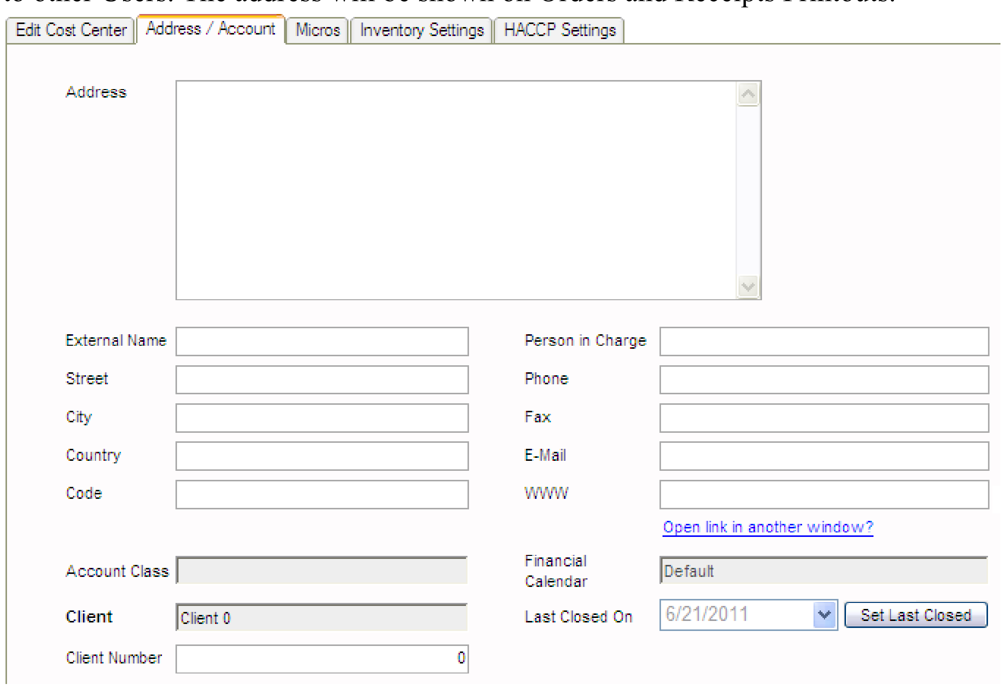


- Number – This is the number that the Cost Center is identified by
- Account (Cost Center) – applies to GL and A/P accounts; the Cost Center's account number is in the A/P System
- Assigned To – this is the parent level of the current Cost Center (location)
- Default Main Store – this is the default Store that the Cost Center receives goods from
- Taxes – shows what types of Taxes are used at this Cost Center
- Closed at – displays when the last Period Count was booked
- Close Cost Center/Store on Stock Take – enable this option to enforce the prevention of Users from editing or booking new documents in the closed period
- Exclude from Central Purchasing – this Cost Center/Store will not be using Central Purchasing
- Using Transit – if this option is enabled, a booked Transfer has to be accepted of declined by the receiving store
- Warehouse – enable this if the Cost Center/Store is a warehouse
- Advanced Storage Location – enabling this option allows Advanced Storage Locations to be used by the Cost Center

- Enable Production on Transfer – when this is enabled, the system allows Production and Transfer in a single step. When a Production Item is Transferred, the system will request how many of the Item should be produced for this Transfer and increase the SOH accordingly
- Allow to use Production Module – if the option Enable Production on Transfer is enabled, the Cost Center can no longer be selected in the Production module. If this option is enabled, the Cost Center will become available in Production again
- Use Sales Price for Transfer – If enabled, the Cost Center will use the Sales Price entered in Master Data | Items instead of the calculated Cost Price
- Automatic Yield – enables the Automated Yield process. A Scheduler job will ensure that Items defined as Automatic Yield will be 'exploded' in the Ingredients defined in the Yield Container.
- Type – Cost Center or Store; Cost Center is selected by default
- Period Control – stores are able to modify the periods by which their counts are sent down

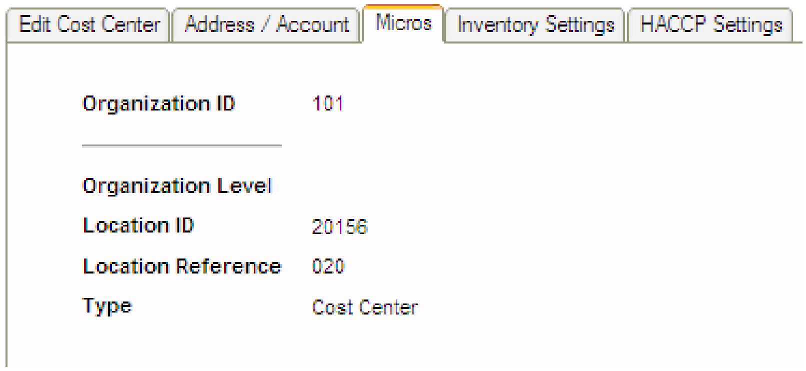
Address Tab

The Address Tab is relatively straight forward. Enter in as much information as you prefer. Keep in mind, the more information you enter, the more descriptive it will be to other Users. The address will be shown on Orders and Receipts Printouts.

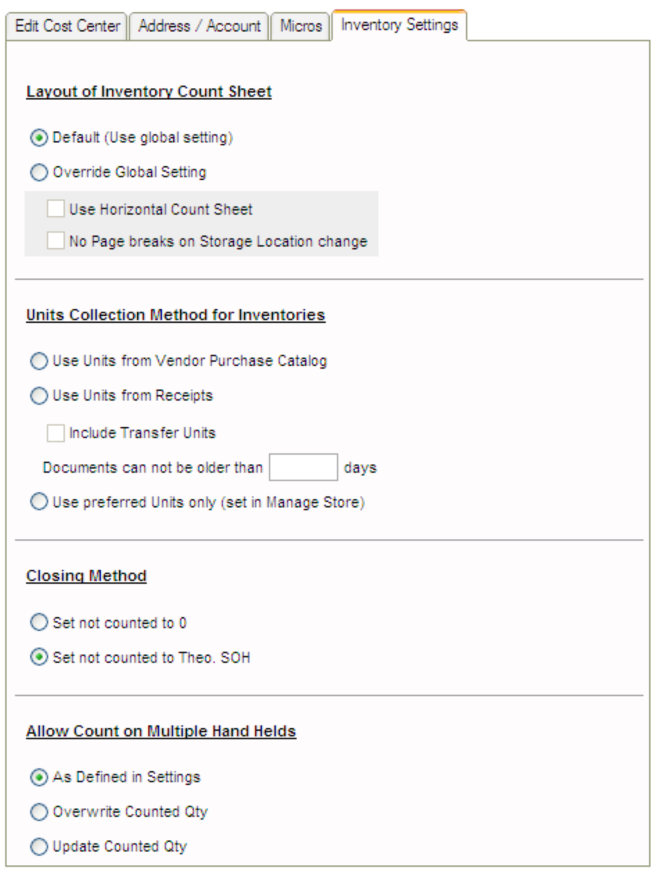


Micros Tab

The Micros Tab displays the mymicros.net location information for the selected Cost Center. This is a display tab only.



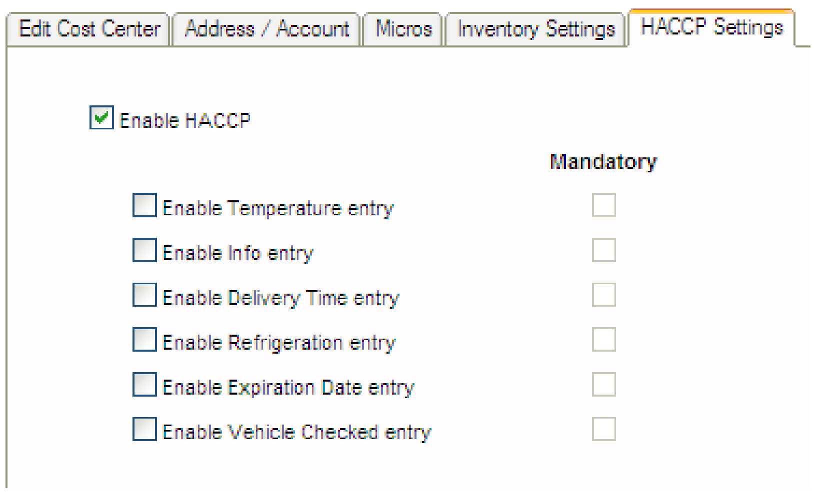
Inventory Settings Tab



From this tab, you can determine what Inventory standards the Cost Center will follow.

- Layout of Inventory Count Sheet – Decide whether the Cost Center will follow global settings for the organization or use a different Count Sheet layout
- Units Collection Method for Inventories – Determine what Units the Cost Center would like to use during counts, if any
- Closing Method - Set the default Inventory Closing Method for the Cost Center. This can be changed when an Inventory is created, if necessary.
- Allow Count on Multiple Hand Helds - Decide whether the Cost Center will follow global settings for the organization or handle multiple counts differently
    - Overwrite Counted Qty - overwrite previously uploaded Count values with the latest values
    - Update Counted Qty - consolidate all Count values that have been uploaded

HACCP Settings

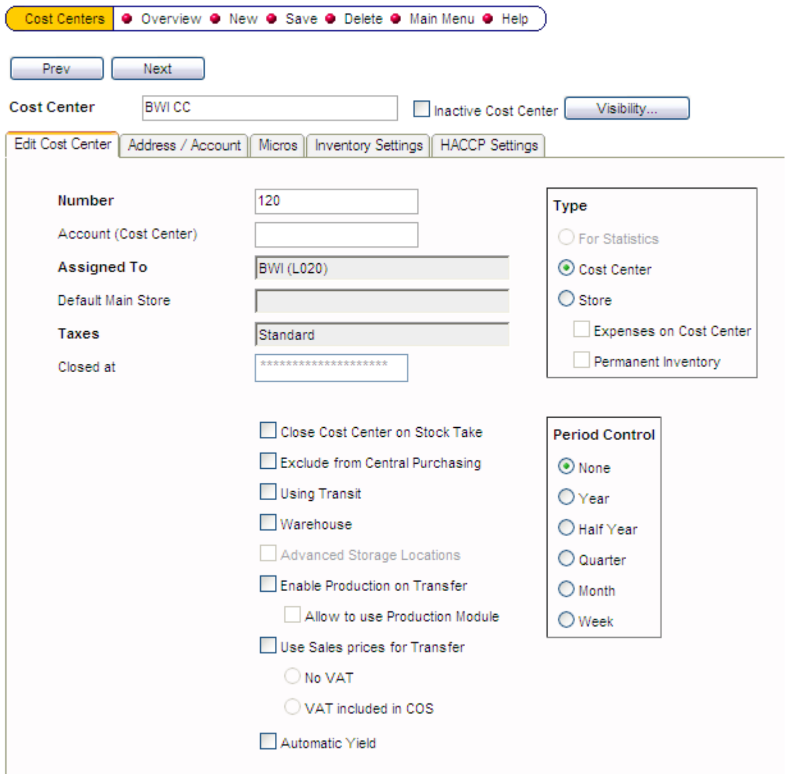


- Enable HACCP – Enable this option if the Cost Center must follow HACCP regulations when receiving product. Each of the options that follow may be enabled for the Cost Center and are able to be a mandatory entry at time of Receipt.

Modify a Cost Center

From the Cost Center Overview window, you can modify existing Cost Centers.

1. Select a Cost Center from the list; the screen will refresh and the Cost Centers Detail window will appear:



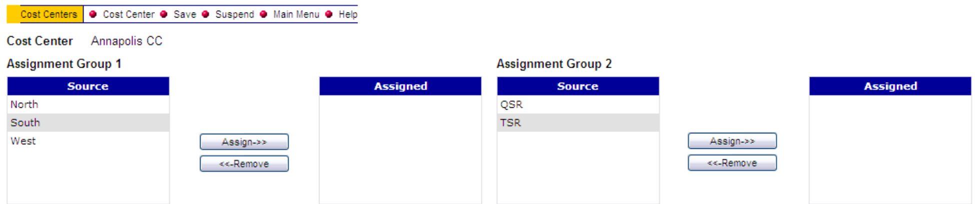
2. Modify the fields on each tab, as necessary.
3. Click Save from the Top Menu Bar.

To Adjust Visibility of a Cost Center

Cost Centers may be assigned to Visibility Criteria Assignment Groups. Doing so expedites the use of Visibility Criteria in other myinventory modules. For example, if you create an Inventory List but you only want Cost Centers that are Quick Service Restaurants located in the West to be able to access it, you could assign those Assignment Groups to that List. All Cost Centers that belong to the QSR and West Assignment Groups will be able to use the Inventory List. To adjust the Visibility of a Cost Center:

1. From the Cost Center Overview window, select a Cost Center (or create a new one)

2. Click the Visibility button; the Cost Centers Visibility Assignment page will appear



3. Modify assignment to Assignment Group 1 and Assignment Group 2 as necessary
4. Select Save from the Top Menu Bar (after your modifications are complete)

The page will refresh with your modified Visibility Criteria.

Delete a Cost Center

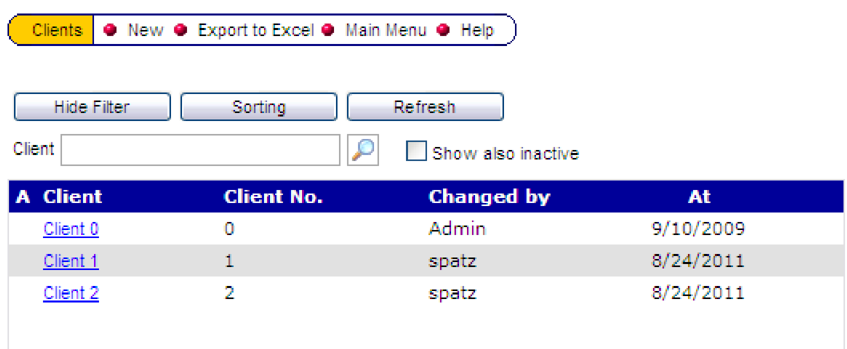
To delete a Cost Center, please refer to the Deleting a Document section of this document.

Clients

The Clients module is helpful when exporting information out of myinventory for use with a Back of House Interface. The Clients module allows you to group Cost Centers together for easier organization when preparing accounting reports.

Clients Overview Window

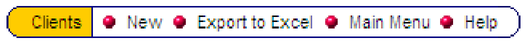
The first page you see after accessing the Clients module is the Clients Overview window:



From this window, you can create new or modify existing Clients.

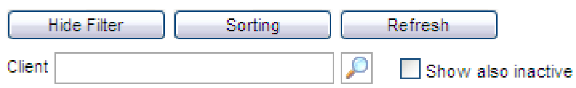
The following section describes the elements contained in the Clients Overview window.

Top Menu Bar



Menu Item	Description
New	Create a new Client
Export to Excel	Opens the current information into an Excel spreadsheet
Main Menu	Return to the Main myinventory Menu
Help	Launch the Help file

Additional Screen Elements

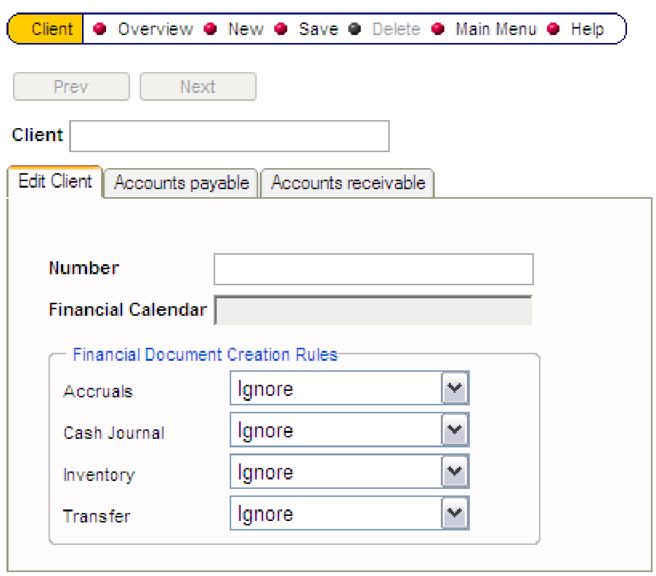


These filters behave as described in the Welcome section. For more information, please refer to the Screen Layout section of the Welcome page.

Create a Client

From the Clients Overview window, you can create a new Client.

1. Select New from the Top Menu Bar; the Clients Detail window will appear with blank fields:



2. Enter the name of the Client, the number that will be associated with it and select the Financial Calendar for the Client

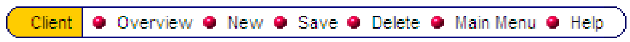
3. Click Save

Your new Client will be saved and available for use.

Clients Detail Window

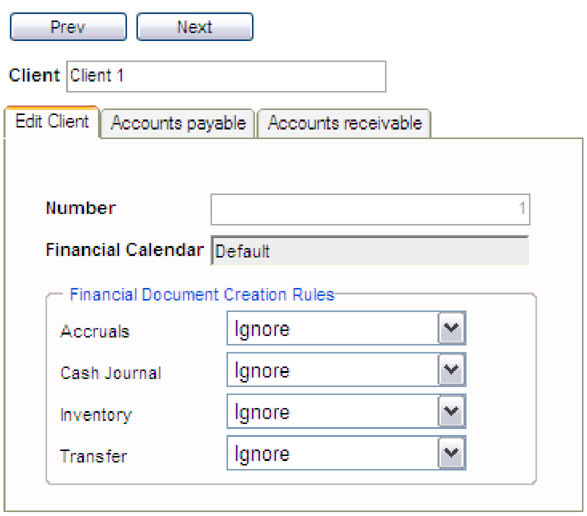
From the Clients Detail window, you can modify existing Clients. The following section describes the elements contained in the Clients Detail window.

Top Menu Bar



Menu Item	Description
Overview	Go to the Overview area
New	Create a new Client
Save	Save updates to a recently created/modified Client
Delete	Delete a Client
Main Menu	Return to the Main myinventory Menu
Help	Launch the Help file

Additional Screen Elements



Screen Element	Description
Previous	View the previous entry in the Clients List
Next	View the next entry in the Clients List
Client	The name of the Client

Screen Element	Description
Number	Displays the number associated with the Client
Financial Calendar	Displays the Financial Calendar that the Client uses

Modify a Client

From the Clients Overview window, you can modify an existing Client:

1. Select a Client from the list; the screen will refresh and the Clients Detail window will appear:
2. Modify the fields as necessary;
3. Click Save

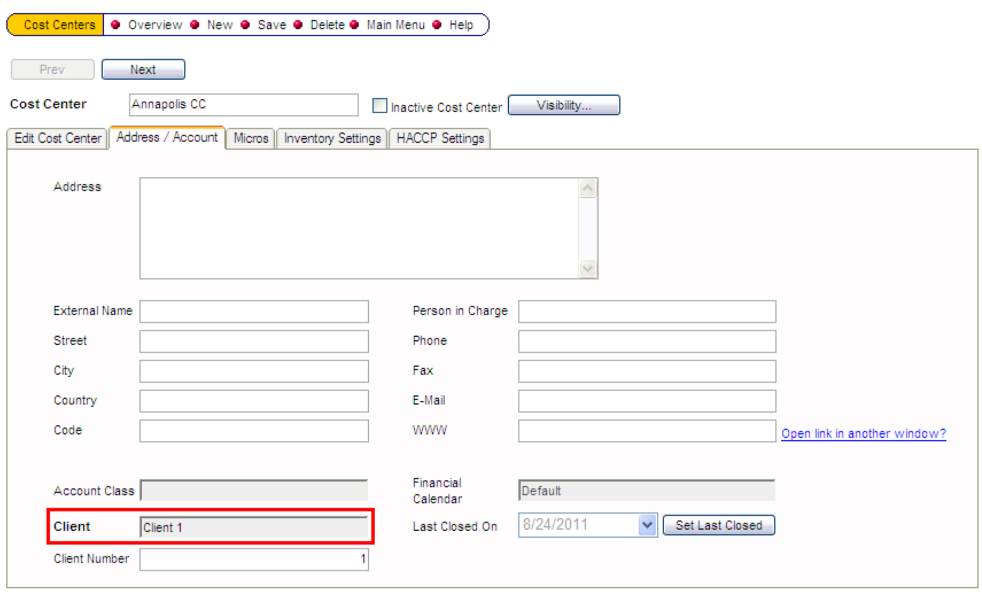
The Client will be updated as per your modifications.

Assign a Client to a Cost Center

When Clients are assigned to Cost Centers, information that is exported from myinventory will be organized by Client type. For organizations with Franchises, this will allow for easier reporting of locations that share accounting systems.

To assign a Client to a Cost Center:

1. Navigate to Master Data | Cost Centers and select the Address/Account tab:



2. Select a Client; the Client Number will populate based on your selection
3. Click Save from the Top Menu Bar

Delete a Client

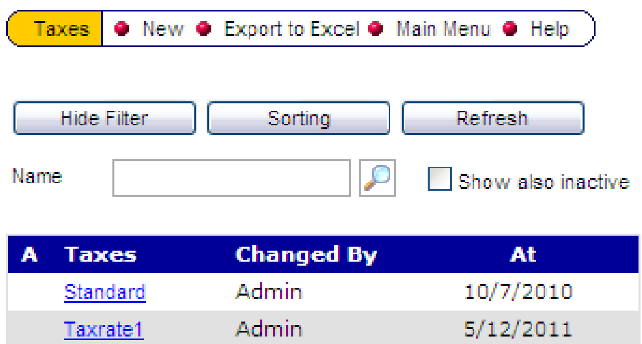
To delete a Client, please refer to the Deleting a Document section of this document.

Taxes

The Taxes module allows organizations to create as many Tax Rates as necessary for their goods. In most cases, beer and wine has a different Tax Rate than food, therefore more than one Tax Rate will need to be available to assign in Item Groups and Items.

Taxes Overview Window

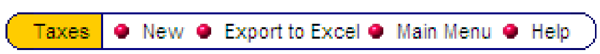
The first page you see after accessing the Taxes module is the Taxes Overview window. To see Taxes, you must click Refresh first:



From this window, you can create new or modify existing Taxes that will be applied to your Purchase Orders, as well as your costs.

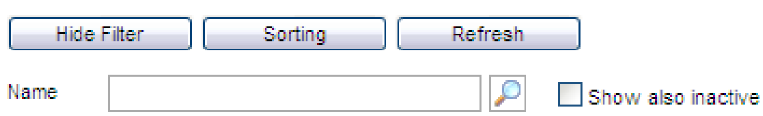
The following section describes the elements contained in the Taxes Overview window.

Top Menu Bar



Menu Item	Description
New	Create a new Tax
Export to Excel	Opens the current information into an Excel spreadsheet
Main Menu	Return to the Main myinventory Menu
Help	Launch the Help file

Additional Screen Elements

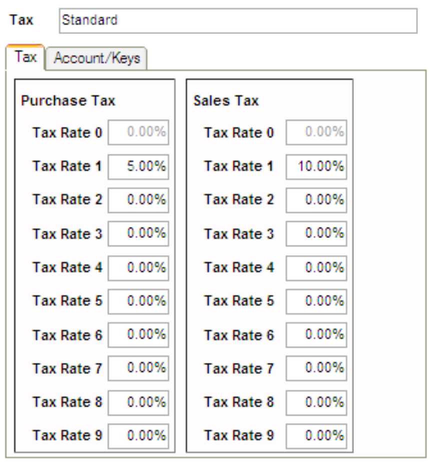


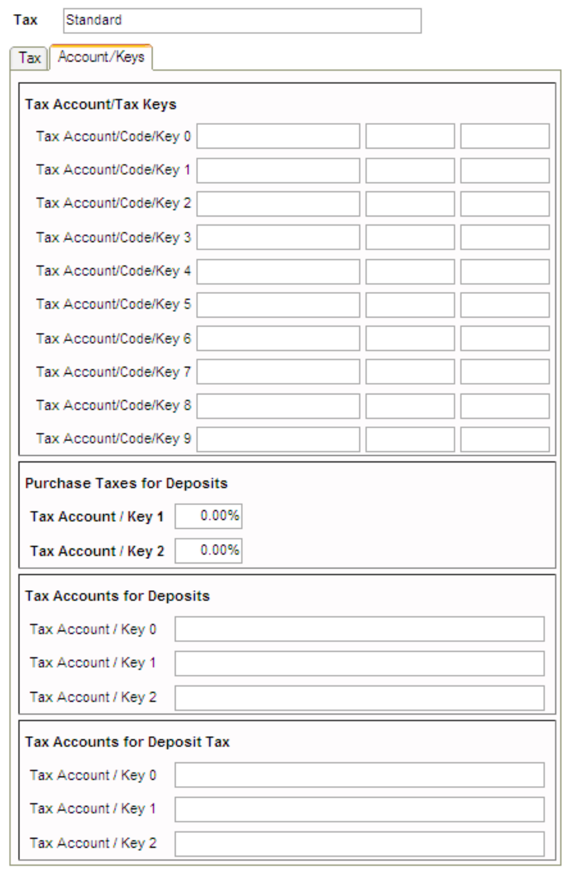
These filters behave as described in the Welcome section. For more information, please refer to the Screen Layout section of the Welcome page.

Create a New Tax

From the Taxes Overview window, you can create a new Tax.

1. Select New from the Top Menu Bar; the Taxes Detail window will appear with blank fields:





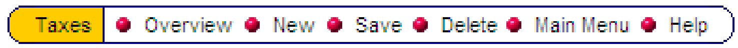
2. Enter the name of the Tax and be sure the Purchase Tax Rates and Sales Tax Rates have information; Purchase Tax and Sales Tax may be zeroes, but they must have some numeric value
3. Click Save

Your new Tax will be saved and available for use.

Taxes Detail Window

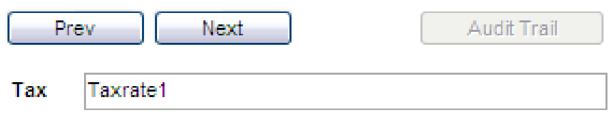
From the Taxes Detail window, you can modify existing Taxes. The following section describes the elements contained in the Taxes Detail window.

Top Menu Bar



Menu Item	Description
Overview	Go to the Overview area
New	Create a new Tax
Save	Save updates to a recently created/modified Taxes
Delete	Delete a Tax
Main Menu	Return to the Main myinventory Menu
Help	Launch the Help file

Additional Screen Elements



Screen Element	Description
Previous	View the previous entry in the Taxes List
Next	View the next entry in the Taxes List
Tax	The name of the Tax

Modify a Tax

From the Taxes Overview window, you can modify existing Taxes:

1. Select a Tax from the list; the screen will refresh and the Taxes Detail window will appear:
2. Modify the fields as necessary;
3. Click Save

The Tax will be updated as per your modifications.

Delete a Tax

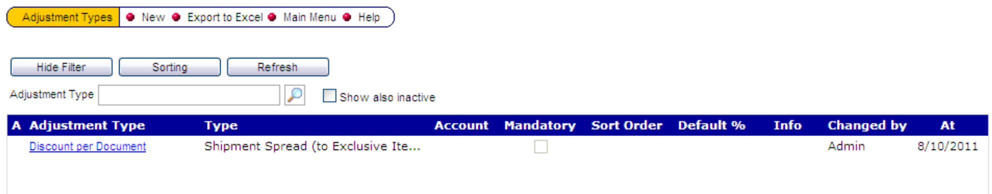
To delete a Tax, please refer to the Deleting a Document section of this document.

Adjustment Types

Adjustment Types provide a way to apply discounts and shipment costs to all Items on a Receipt.

Adjustment Types Overview Window

The first page you see after accessing the Adjustment Types module is the Adjustment Types Overview window:



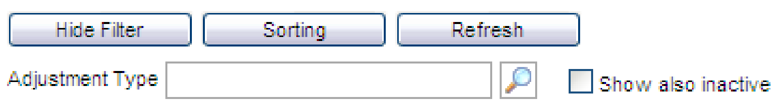
From this window, you can create new or modify existing Adjustment Types that will be applied to your Receipts, as well as your costs.

The following section describes the elements contained in the Adjustment Types Overview window.

Top Menu Bar

Menu Item	Description
New	Create a new Adjustment Type
Export to Excel	Opens the current information into an Excel spreadsheet
Main Menu	Return to the Main myinventory Menu
Help	Launch the Help file

Additional Screen Elements

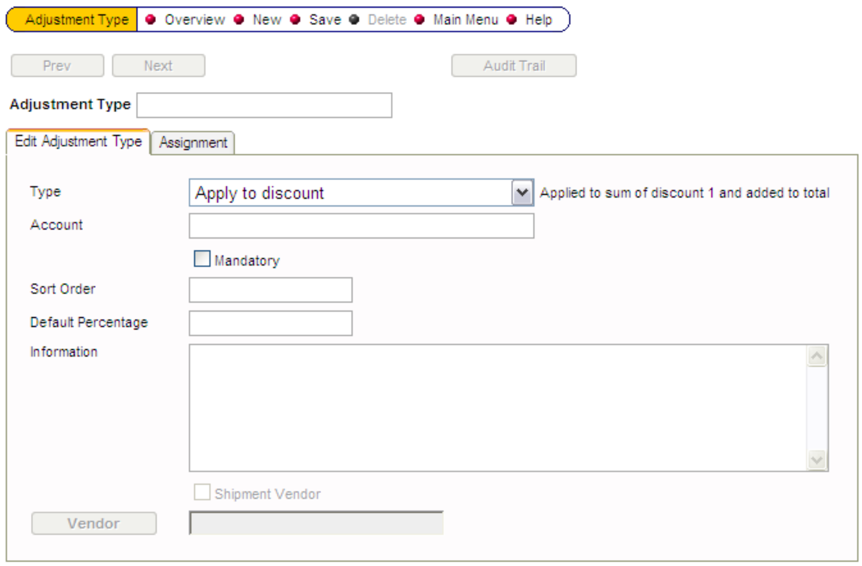


These filters behave as described in the Welcome section. For more information, please refer to the Screen Layout section of the Welcome page.

Create a New Adjustment Type

From the Adjustment Types Overview window, you can create a new Adjustment Type.

1. Select New from the Top Menu Bar; the Adjustment Types Detail window will appear with blank fields:



2. Enter the name of the Adjustment Type
3. Determine what Type of Adjustment this will be:
   - Apply to Discount: Applied to sum of discount 1 and added to total
   - Apply to Net: Applied to sum of (net + discount 1) maybe discount 2/ICMS
   - Apply to VAT: Apply to sum of VAT
   - Apply to Gross: Apply to sum of gross
   - Shipment Spread:% spread based on value
   - Shipment not Spread: One sum, influence to total, but not item cost
   - Shipment Equal: Total shipment value will be applied to all records
   - Shipment spread (to marked Items only):% spread based on value (to marked Items
   - Shipment Spread (to Exclusive Items Only):% spread based on value (to exclusive Items only)
4. Enter any additional information in the remaining fields. The Account field is purely for use in myinventory exports into accounting systems
5. If the Adjustment Type is for a specific Vendor, enable the Shipment Vendor option and select a Vendor from the field below
6. Click Save

Your new Adjustment Type will be saved and available for use.

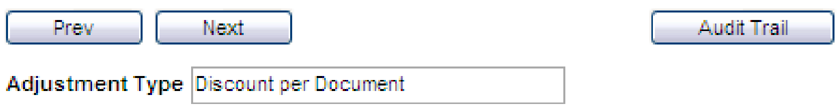
Adjustment Types Detail Window

From the Adjustment Types Detail window, you can modify existing Adjustment Types. The following section describes the elements contained in the Adjustment Types Detail window.

Top Menu Bar

Menu Item	Description
Overview	Go to the Overview area
New	Create a new Adjustment Type
Save	Save updates to a recently created/modified Adjustment Type
Delete	Delete an Adjustment Type
Main Menu	Return to the Main myinventory Menu
Help	Launch the Help file

Additional Screen Elements



Screen Element	Description
Previous	View the previous entry in the Adjustment Types List
Next	View the next entry in the Adjustment Types List
Adjustment Type	The name of the Adjustment Type

Modify an Adjustment Type

From the Adjustment Types Overview window, you can modify existing Adjustment Types:

1. Select an Adjustment Type from the list; the screen will refresh and the Adjustment Types Detail window will appear:
2. Modify the fields as necessary;
3. Click Save

The Adjustment Type will be updated as per your modifications.

Delete a Tax

To delete an Adjustment Type please refer to the Deleting a Document section of this document.

Fiscal Fields

The Fiscal Fields module is used to fulfill tax requirements in Latin America.

Foreign Currency

Foreign Currencies are used when you are receiving goods from a Vendor that uses a different Currency than your organization. These can be synced from mymicros.net or they may be configured in this module.

Once Foreign Currencies have been configured, they must to linked to the Vendors that use them by navigating to Master Data | Vendors | Edit Vendor tab. Enter the Foreign Currency in the Currency field and Save.

Foreign Currency Overview Window

The first page you see after accessing the Foreign Currency icon is the Foreign Currency Overview window:

The following section describes the elements contained in the Foreign Currency Overview window.

Top Menu Bar

Menu Item	Description
New	Create a new Foreign Currency
Export to Excel	Opens the current information into an Excel spreadsheet
Main Menu	Return to the Main myinventory Menu
Help	Launch the Help file

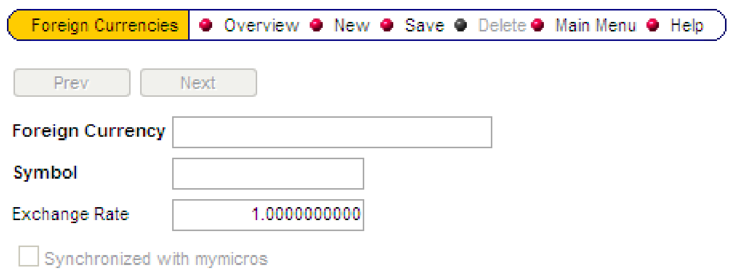
Additional Screen Elements

These filters behave as described in the Welcome section. For more information, please refer to the Screen Layout section of the Welcome page.

Create a New Foreign Currency

From the Foreign Currency Overview window, you can create a new Foreign Currency.

1. Select New from the Top Menu Bar; the Foreign Currency Detail window will appear with blank fields:



2. Enter the name of the Foreign Currency
3. Enter a Symbol for the Currency
4. Enter the exchange rate
5. Click Save

Your new Foreign Currency will be saved and available for use.

Foreign Currency Detail Window

From the Foreign Currency Detail window, you can modify existing Foreign Currency. The following section describes the elements contained in the Foreign Currency Detail window.

Top Menu Bar

Menu Item	Description
Overview	Go to the Overview area
New	Create a new Foreign Currency
Save	Save updates to a recently created/modified Foreign Currency
Delete	Delete a Foreign Currency

Menu Item	Description
Main Menu	Return to the Main myinventory Menu
Help	Launch the Help file

Additional Screen Elements

Screen Element	Description
Previous	View the previous entry in the Foreign Currency List
Next	View the next entry in the Foreign Currency List
Foreign Currency	The name of the Foreign Currency
Symbol	The Symbol assigned to the Foreign Currency
Exchange Rate	The exchange rate of the Foreign Currency. When this field is modified, the information does not backdate to adjust previous data
Synchronized with mymicros.net	If this is enabled, the Foreign Currency is synced with mymicros.net and exchange rates will be updated automatically

Modify a Foreign Currency

From the Foreign Currency Overview window, you can modify existing Foreign Currency:

1. Select a Foreign Currency from the list; the screen will refresh and the Foreign Currency Detail window will appear
2. Modify the fields as necessary
3. Click Save

The Foreign Currency will be updated as per your modifications.

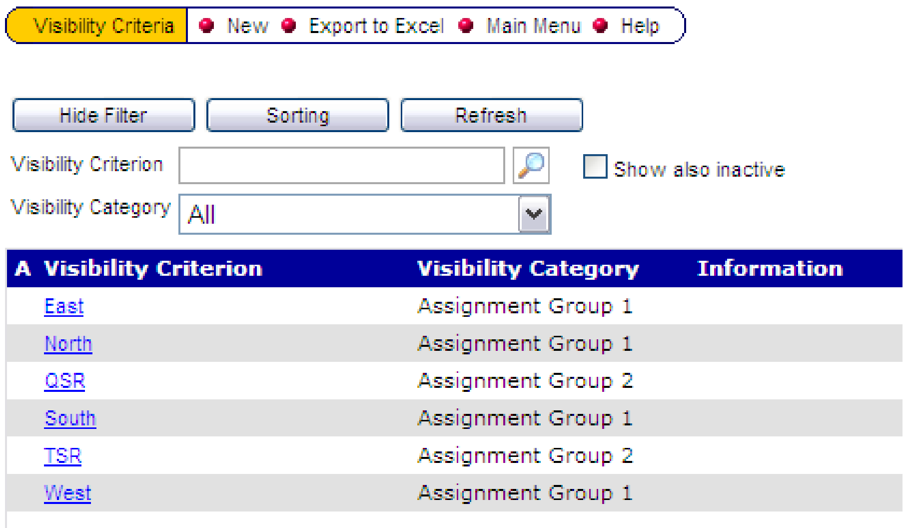
Delete a Foreign Currency

To delete a Foreign Currency please refer to the Deleting a Document section of this document.

Visibility Criteria

Visibility Criteria Overview Window

The first page you see after accessing the Visibility Criteria icon is the Visibility Criteria Overview window:



Assigning Visibility Criteria will determine which Cost Centers will have access to which items/information and which Cost Centers will physically be able to view those Items. Visibility Criteria can be categorized two ways; usually, those two ways are (1) district and (2) concept. Recipes, Items, and Lists are all subject to Visibility Criteria.

Separating by districts can give Cost Centers the ability to provide Items of regional cuisine. For example, an organization whose primary Menu Item is pizza may have done research that determined people in Hawaii enjoy pineapple and other exotic fruits on their pizza. The organization can set the Visibility Criteria to allow their Hawaiian Cost Centers the ability to select and view the “pineapple” option and not give other stores that option.

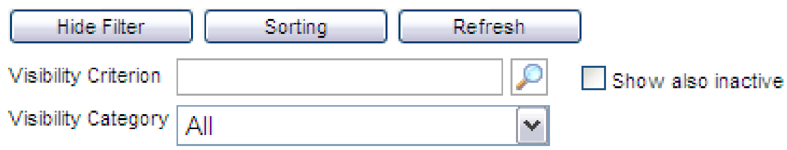
An organization can also separate by concept. Say a very large organization owns a seafood restaurant, an Italian restaurant, and a BBQ restaurant. Not every menu Item or Recipe will be available for each and every “concept” of restaurant. Using Visibility Criteria can limit the seafood restaurant to view only seafood menu items, the Italian restaurant can see items like pasta entrees, and the BBQ restaurant will be able to view menu selections like ribs and pulled pork. All of the information can be housed in the myinventory application and assigned to the concept restaurants as necessary.

The following section describes the elements contained in the Visibility Criteria Overview window.

Top Menu Bar

Menu Item	Description
New	Create a new Visibility Criteria
Export to Excel	Opens the current information into an Excel spreadsheet
Main Menu	Return to the Main myinventory Menu
Help	Launch the Help file

Additional Screen Elements

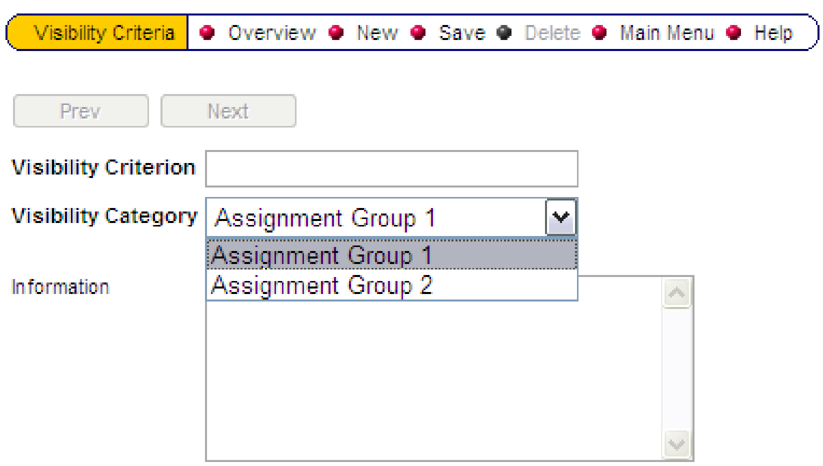


These filters behave as described in the Welcome section. For more information, please refer to the Screen Layout section of the Welcome page.

Create a New Visibility Criteria

From the Visibility Criteria Overview window, you can create a new Visibility Criterion.

1. Select New from the Top Menu Bar; the Visibility Criteria Detail window will appear with blank fields:



2. Enter the name of the Visibility Criterion

3. Enter the Visibility Category
4. Enter any notes into the Information field
5. Click Save

Your new Visibility Criterion will be saved and available for use.

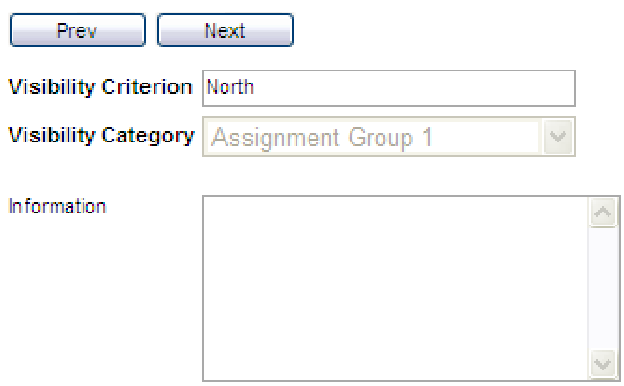
Visibility Criteria Detail Window

From the Visibility Criteria Detail window, you can modify existing Visibility Criterion. The following section describes the elements contained in the Visibility Criteria Detail window.

Top Menu Bar

Menu Item	Description
Overview	Go to the Overview area
New	Create a new Visibility Criteria
Save	Save updates to a recently created/modified Visibility Criteria
Delete	Delete a Visibility Criterion
Main Menu	Return to the Main myinventory Menu
Help	Launch the Help file

Additional Screen Elements



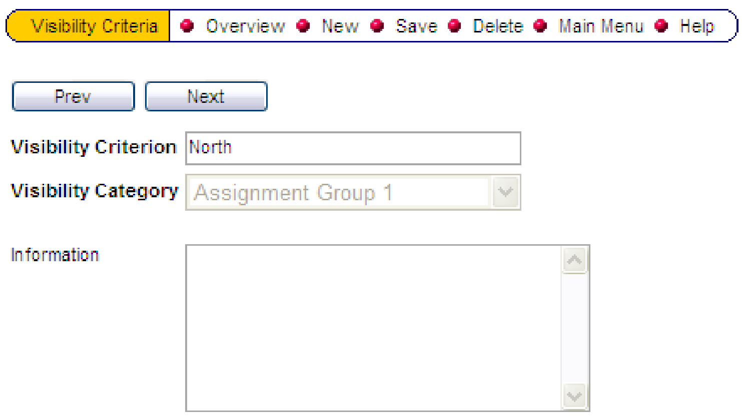
Screen Element	Description
Previous	View the previous entry in the Visibility Criteria List
Next	View the next entry in the Visibility Criteria List
Visibility Criterion	The name of the Visibility Criteria

Screen Element	Description
Visibility Category	One of the two ways that an organization had decided to categorize its visibility methods.
Information	Enter additional information here when necessary

Modify a Visibility Criteria

From the Visibility Criteria Overview window, you can modify existing Visibility Criteria:

1. Select a Visibility Criteria from the list; the screen will refresh and the Visibility Criteria Detail window will appear:



2. Modify the fields as necessary
3. Click Save

The Visibility Criteria will be updated as per your modifications.

Delete a Visibility Criteria

To delete a Visibility Criteria, please refer to the Deleting a Document section of this document.

Setting Visibility Criteria

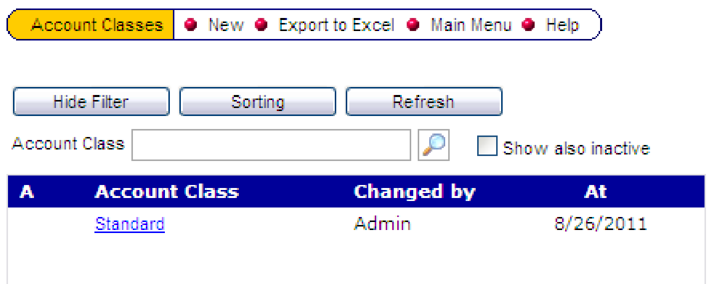
Once Visibility Criteria has been configured, navigate to Master Data | Cost Centers | Visibility and define the Assignment Groups for each Cost Center. Then, depending on what module you are working in, Visibility Criteria may be an option. If you have set up your Visibility Criteria appropriately in this module, you will be able to assign Visibility Criteria accurately in the other modules.

Account Classes

The Account Classes module provides organizations with the ability to organize Item Groups together in preparation for a Back Office export. For example, an organization may have an Item Group called Beef with three different Account Numbers, one for each separate concept within the organization. Account Classes will provide a more efficient way of organizing and exporting data from the Back Office Interface.

Account Classes Overview Window

The first page you see after accessing the Account Classes icon is the Account Classes Overview window:

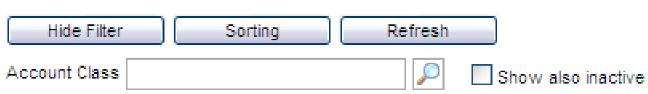


The following section describes the elements contained in the Account Classes Overview window.

Top Menu Bar

Menu Item	Description
New	Create a new Account Class
Export to Excel	Opens the current information into an Excel spreadsheet
Main Menu	Return to the Main myinventory Menu
Help	Launch the Help file

Additional Screen Elements

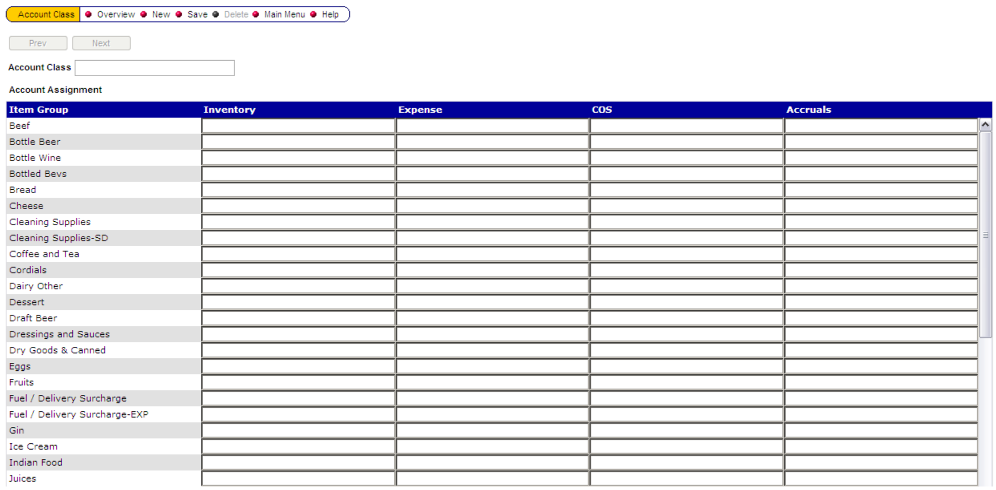


These filters behave as described in the Welcome section. For more information, please refer to the Screen Layout section of the Welcome page.

Create a New Account Class

From the Account Classes Overview window, you can create a new Account Class.

1. Select New from the Top Menu Bar; the Account Classes Detail window will appear with blank fields:



2. Enter the name of the Account Class
3. Enter Account Numbers for the Items Groups in as many sections as necessary. The four Accounting Department options are Inventory, Expense, COS, and Accruals
4. Select Save from the Top Menu Bar

Your new Account Class will be saved and available for use.

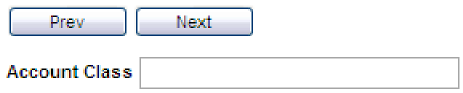
Account Classes Detail Window

From the Account Classes Detail window, you can modify existing Account Classes. The following section describes the elements contained in the Account Classes Detail window.

Top Menu Bar

Menu Item	Description
Overview	Go to the Overview area
New	Create a new Account Class
Save	Save updates to a recently created/modified Account Class
Delete	Delete an Account Class
Main Menu	Return to the Main myinventory Menu
Help	Launch the Help file

Additional Screen Elements



Screen Element	Description
Previous	View the previous entry in the Account Classes List
Next	View the next entry in the Account Classes List
Account Class	The name of the Account Class

Modify an Account Class

From the Account Classes Overview window, you can modify existing Account Class:

1. Select an Account Class from the list; the screen will refresh and the Account Classes Detail window will appear
2. Modify the fields as necessary
3. Click Save

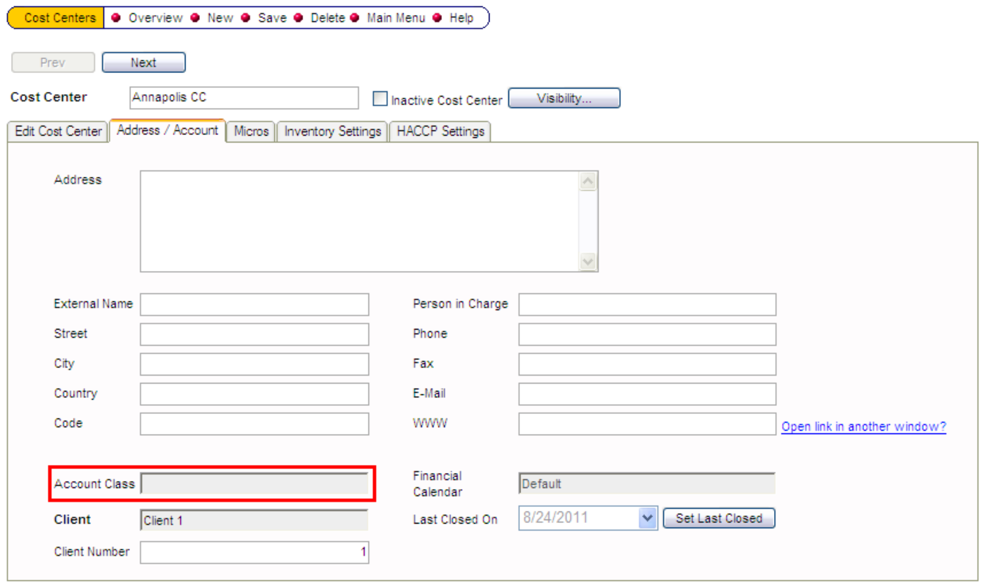
The Account Class will be updated as per your modifications.

Assign an Account Class to a Cost Center

When Account Classes are assigned to Cost Centers, Item Group information will be organized in accordance to the Account Numbers defined within the Class. For organizations with Franchises, this will allow for easier reporting of locations that share accounting systems.

To assign an Account Class to a Cost Center:

1. Navigate to Master Data | Cost Centers and select the Address/Account tab:



2. Select an Account Class
3. Click Save from the Top Menu Bar

Delete an Account Class

To delete an Account Class, please refer to the Deleting a Document section of this document.

Maintenance

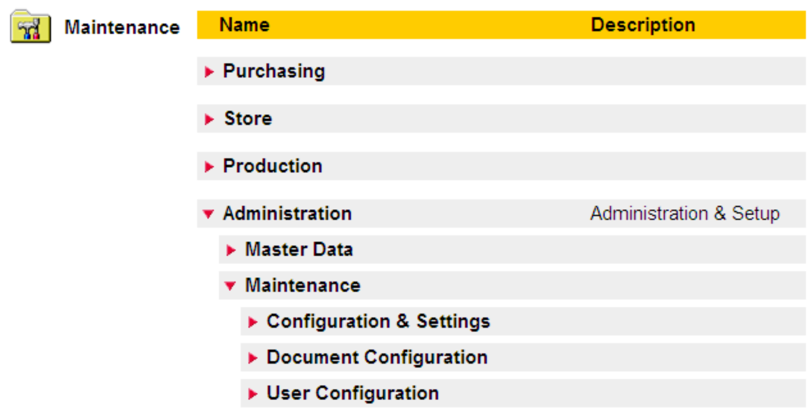
Introduction and Overview

Maintenance is a section devoted to organizing and essentially "maintaining" the myinventory application. myinventory is a powerful tool, capable of keeping accurate track of products throughout its process life cycle.

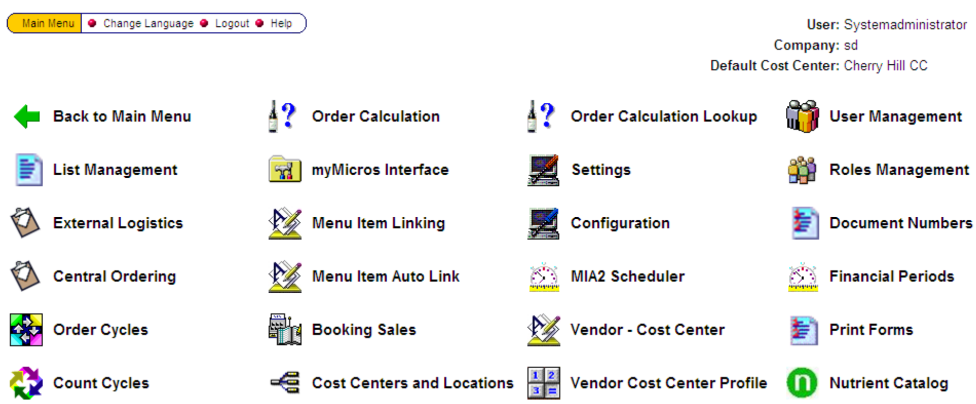
Maintenance is only available to Users who have been given the required User Rights. Also, certain portions of Maintenance may or may not be available.

Accessing the Maintenance Module for myinventory

To access the Maintenance module, click the Maintenance icon from the Main Menu or select Maintenance from below the Administration Tasks:



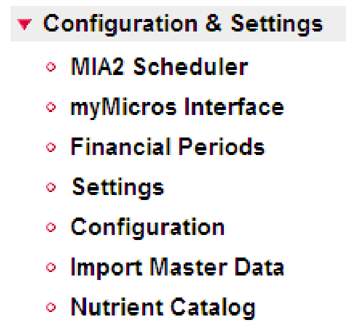
A sub-menu will appear. If you are using the Classic Menu View, your page will look similar to:



If you are using the Collapse Menu View, you will need to further specify which task you wish to perform. In the Collapse Menu View, tasks are categorized by: Configuration & Settings, Document Configuration, and User Configuration.

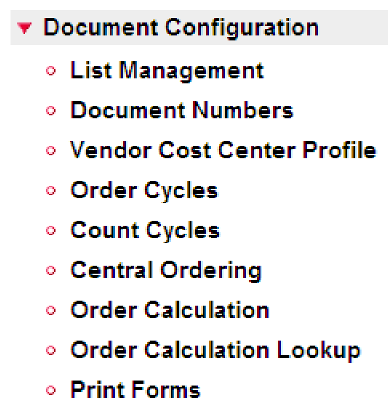
Configuration & Settings

- MIA2 Scheduler
- mymicros.net Interface
- Financial Periods
- Settings
- Configuration
- Import Master Data
- Nutrient Catalog



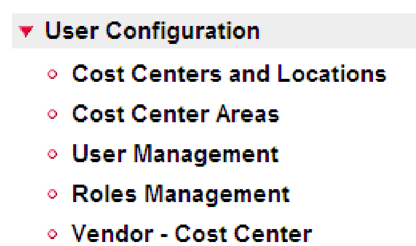
Document Configuration

- List Management
- Document Numbers
- Vendor Cost Center Profile
- Order Cycles
- Count Cycles
- Central Ordering
- Order Calculation
- Order Calculation Lookup
- Print Forms



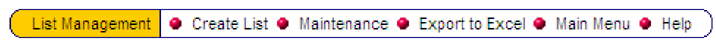
User Configuration:

- Cost Centers and Locations
- Cost Center Areas
- User Management
- Roles Management
- Vendor - Cost Center



For the sake of this document, we will examine the modules in the Maintenance menu according to the organization provided in the Collapse Menu view. We will begin with Configuration & Settings, then Document Configuration, then User Configuration.

Note *In the Maintenance module, the Top Menu Bar might be different depending upon which Menu View you have selected. If you are using the Classic Menu, each Menu Bar will have an option for returning to the Maintenance icon-format menu:*



If you are using the Collapse Menu View, you will not have the option of returning to the Maintenance icon-format Menu since it does not exist in this View:

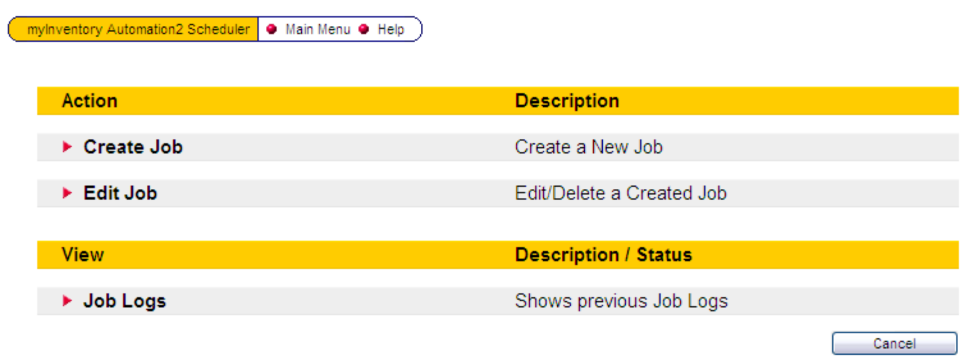
This functionality will appear in every sub-task of the in the Maintenance module.

MIA2 Scheduler

The MIA2 Scheduler is a module that allows MICROS to deploy and execute the appropriate jobs for organizations. Under typical circumstances, the User will never need to access this area. If a User attempts to perform any function under this option, they will receive an “unable to perform job” error message.

MIA2 Scheduler Overview Window

The first page displayed after you access the MIA2 Scheduler module is the Overview window.

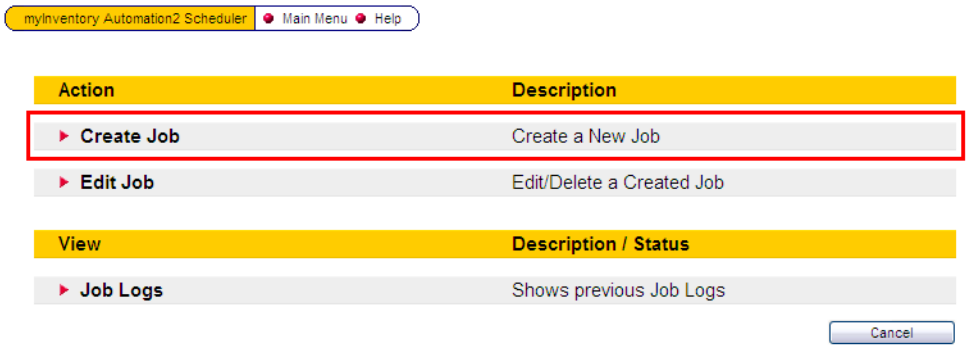


From the Overview screen, you can create a new job, edit an existing job, and view job logs.

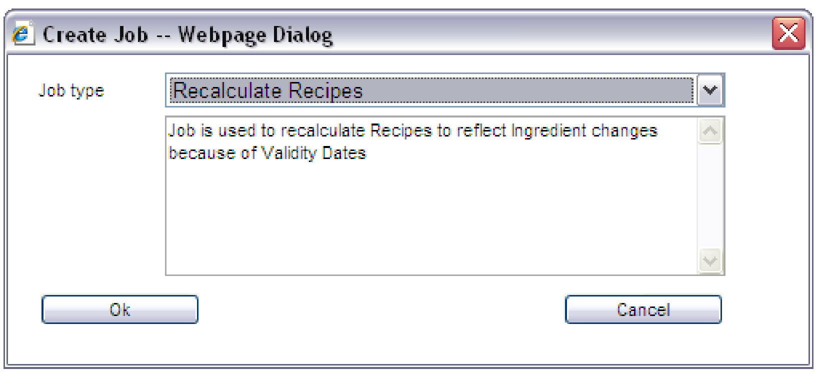
Create a new MIA2 Job

To create a new MIA2 job:

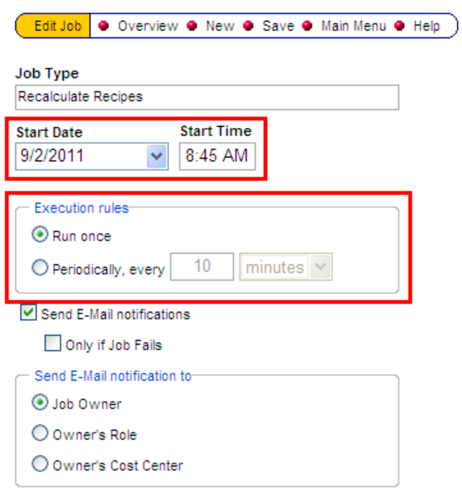
1. Select Create Job from the Overview window:



2. The Create Job web page dialog will be displayed. Select a job from the drop down and click OK:



3. The Edit Job window will be opened. Select a Start Date and Start Time and set the Execution Rules:



4. Select Save from the Top Menu Bar

The new job will run as configured.

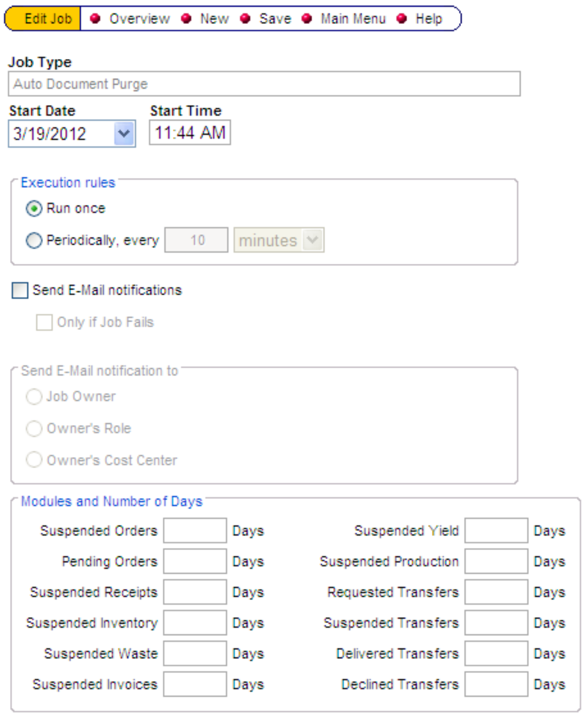
The Edit Job Window

The following section describes the Edit Job window.

Top Menu Bar

Menu Item	Description
Overview	Go to the subject area Overview
New	Creates a new MIA2 job
Save	Saves the current settings
Main Menu	Return to the Main myinventory Menu.
Help	Launch the Help file.

Additional Screen Elements



Screen Element	Description
Job Type	Displays the MIA2 job type
Start Date	Select the date the job will start
Start Time	Select the time the job will run
Execution Rules	Run once - select this option to run the job one time, at the indicated date and time Periodically, every... - select this to run the job on a regular basis. Indicate in the next fields how often. Choose a time frame from minutes, hours and days
Send E-Mail Notifications	Enable this if the system should send E-Mail notifications when the job is run. Only if Job Fails should be enabled if an E-Mail should only be sent if the job fails

Screen Element	Description
Send E-Mail Notifications to	Job Owner - will send an E-Mail to the User who created the job Owner's Role - will send an E-Mail to all Users belonging to the same Role as the job owner Owner's Cost Center - will send an E-Mail to all Users belonging to the same Cost Center as the job owner
Modules and Number of Days	This section is only available for the Auto Document Purge Job. Each document type Listed can be configured to be purged at a specified age. The minimum value for these fields in 30, except for Suspended Inventory, which is 60, and a maximum value of 999 may be entered. Only documents where number of days contains a value will be purged when the job runs, and purging will be based on the document date, not the date when the document was created.

MIA2 Scheduler Jobs

The following describes the MIA2 Scheduler jobs available for selection:

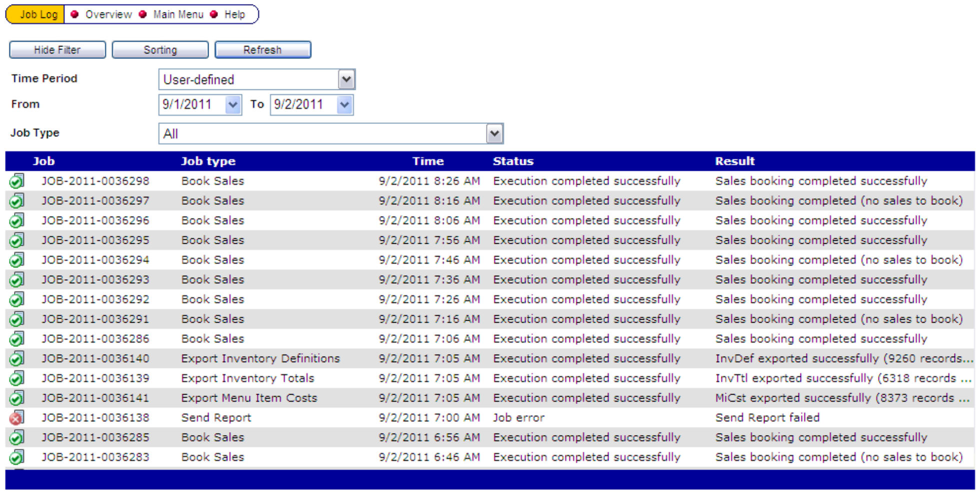
Menu Item	Description
Auto Document Purge	Job purges historical information in Ordering, Receiving, Inventory, Waste, Invoicing, Yield, Production and Transfers
Automatic Yield	Converts Base Items in Automatic Yield List to Inventory Items
B2B Auto Linking	Job links Purchase Items from Item Catalog to Vendor Purchase Item (VPC) where matching Vendor Item Numbers are identified using myinventory Automation
B2B Import Invoices/Credit Notes	Job imports Invoices/Credit Notes if myinventory Automation is used for B2B Receiving
B2B Import Item Catalogs	Job imports Item Catalog for Vendors using myinventory Automation

Menu Item	Description
B2B Import Order Acknowledgements	Imports Purchase Order Acknowledgements if Vendor has 'Use myinventory Automation' enabled
B2B Import Order Cycles	Job imports Order Cycles if myinventory Automation Service is used for B2B Order Cycles Import
B2B Send Purchase Orders	Job sends Purchase Orders to Vendor if 'Use myinventory Automation' is enabled for Vendor
B2B Send Purchase Orders Status Reports	Job sends Purchase Orders Status Report to configured User if 'Use myinventory Automation' is enabled for Vendor. Only useful with Central Ordering with one order per Vendor and Day
B2B Summary	Job sends summary of B2B jobs to configured User
Book All Sales From Buffer	Job books all Sales including those remaining in Sales Buffer
Book Invoices to B/O	Job Books Closed Invoices to the B/O IFC Module
Book Sales	Job books current Sales
Calculate Average Usage	Job calculates average usage - must run daily if using Suggested Ordering
CISBOX Invoice Import	Job imports Invoice Headers if Vendor is using CISBOX
Cleanup Service Job Queue	Job purges historical information older than 7 days from the Service Job Queue
Database Purge	Job purges historical information (based on Configuration Settings) in the HL7 Interface tables
Export GL Inventories	Job processes Inventory GL Data in selected range
Export GL Transfers	Job will process all Transfer GL Data in selected range
Export Inventory Definitions	Job exports Inventory definitions to mymicros.net
Export Inventory Totals	Job Export Inventory totals to mymicros.net

Menu Item	Description
Export Menu Item Costs	Job Export Menu Item Cost to mymicros.net
External Logistics Export	Summoned by Transfer function in External Logistics module. Exports External Logistics Transfer to FTP for retrieval by External Logistics Vendor
External Logistics Import	Summoned by Import function in External Logistics module. Imports Transfers processed by External Logistics Vendor, setting Status of Transfer to Delivered
Menu Item AutoLink	Job copies Menu Item Linking from Master Cost Center to Sub Cost Center - overwrites all links to Sub
Process Count Cycles	Job creates Inventories based on Configured Count Cycles
Process Individual Count Cycles	Applies action (Create, Freeze, Book) to Count Cycle specified in Job. Freeze and Book will apply only to Counts created by MIA2 from that Count Cycle
Recalculate Recipes	Job is used to recalculate Recipes to reflect Ingredient changes because of Validity Dates
Remove Unused Items from Store	Deletes Items from Manage Store with SOH of 0 for number of days specified in Job
Send Report	Job sends Import/Export Status Report email to configured User
Transfer on Sales	Job creates Transfers if alternate Depletion Cost Center used
Update Last Purchase Price	Job updates active VPI prices to Last Purchase Price of the Store Item

MIA2 Scheduler Job Logs

The MIA2 Scheduler Job Logs section allows you to view what jobs have been successfully completed and what jobs have failed.



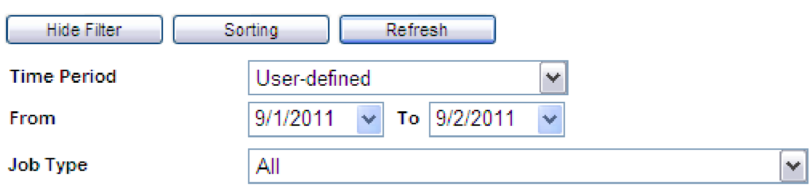
Job	Job type	Time	Status	Result
JOB-2011-0036298	Book Sales	9/2/2011 8:26 AM	Execution completed successfully	Sales booking completed successfully
JOB-2011-0036297	Book Sales	9/2/2011 8:16 AM	Execution completed successfully	Sales booking completed (no sales to book)
JOB-2011-0036296	Book Sales	9/2/2011 8:06 AM	Execution completed successfully	Sales booking completed successfully
JOB-2011-0036295	Book Sales	9/2/2011 7:56 AM	Execution completed successfully	Sales booking completed successfully
JOB-2011-0036294	Book Sales	9/2/2011 7:46 AM	Execution completed successfully	Sales booking completed (no sales to book)
JOB-2011-0036293	Book Sales	9/2/2011 7:36 AM	Execution completed successfully	Sales booking completed successfully
JOB-2011-0036292	Book Sales	9/2/2011 7:26 AM	Execution completed successfully	Sales booking completed successfully
JOB-2011-0036291	Book Sales	9/2/2011 7:16 AM	Execution completed successfully	Sales booking completed (no sales to book)
JOB-2011-0036286	Book Sales	9/2/2011 7:06 AM	Execution completed successfully	Sales booking completed successfully
JOB-2011-0036140	Export Inventory Definitions	9/2/2011 7:05 AM	Execution completed successfully	InvDef exported successfully (9260 records...
JOB-2011-0036139	Export Inventory Totals	9/2/2011 7:05 AM	Execution completed successfully	InvTtl exported successfully (6318 records ...
JOB-2011-0036141	Export Menu Item Costs	9/2/2011 7:05 AM	Execution completed successfully	MiCst exported successfully (8373 records ...
JOB-2011-0036138	Send Report	9/2/2011 7:00 AM	Job error	Send Report failed
JOB-2011-0036285	Book Sales	9/2/2011 6:56 AM	Execution completed successfully	Sales booking completed successfully
JOB-2011-0036283	Book Sales	9/2/2011 6:46 AM	Execution completed successfully	Sales booking completed (no sales to book)

The following section describes the elements contained in the MIA2 Scheduler Job Logs window.

Top Menu Bar

Menu Item	**Description**
Overview	Go to the subject area Overview
Main Menu	Return to the Main myinventory Menu.
Help	Launch the Help file.

Additional Screen Elements



These filters behave as described in the Welcome section. For more information, please refer to the screen layout section of the Welcome page.

Screen Element	**Description**
Job Type	Select the type of job to view in the result set

Information Bar

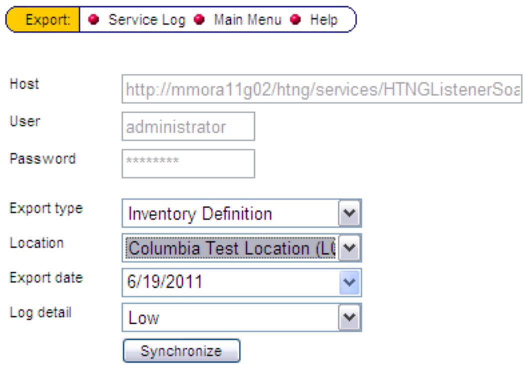
Menu Item	Description
Job	Displays the job number
Job Type	Displays the job type
Time	Displays the time the job was executed
Status	Displays if the job execution was a success or failure
Result	Displays a brief description of what resulted from the executed job

mymicros.net Interface

The mymicros.net Interface is where you can manually sync information from the myinventory Application to the mymicros.net reporting application. Menu Item Costs, Inventory Totals and/or Menu Definitions can be sent to mymicros.net. This module is available for support reasons only. Daily exports should be scheduled via the MIA2 Scheduler.

The mymicros.net Interface (Export) Overview Window

The first page you will see after accessing the mymicros.net Interface is the Overview window. This page is also known as the Export window:



Tips & Tricks

This module should not be used if exports have already been done for the previous date. This module ***is not able to send totals for the current day****. If Users try to send current day info or a day that has already been exported, they will receive an error.*

This module is primarily for MICROS in the event that scheduled exports do not run. MICROS recommends strong caution before modifying anything here. You may want to contact your Account Manager or the mymicros.net Group at mymicros@micros.com before modifying any of the configurations in this module.

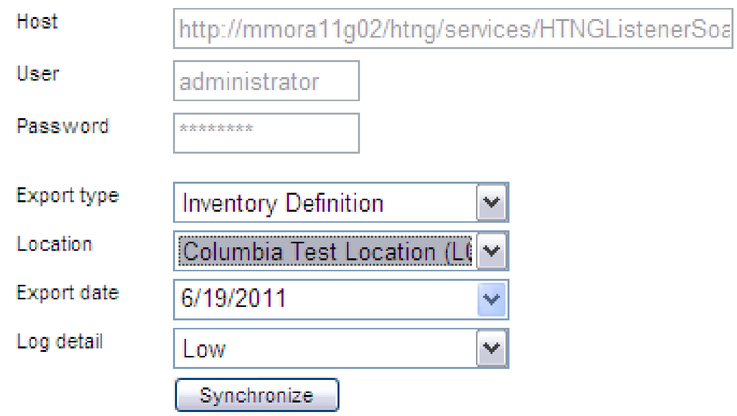
You may also click the Top Menu Bar option of Service Log to be directed to a page where you can search for and locate the Service Log.

The following section describe the mymicros.net Interface screen elements.

Top Menu Bar

Menu Item	Description
Service Log	This is a log of every transaction that takes place between myinventory and mymicros.net
Main Menu	Return to the Main myinventory Menu.
Help	Launch the Help file.

Additional Screen Elements

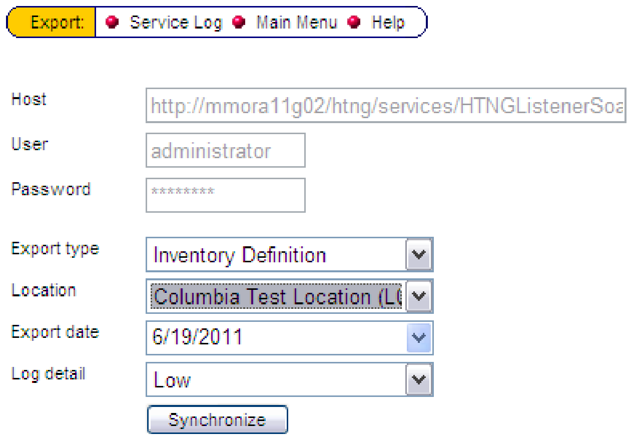


Screen Element	Description
Host	This is the address for the mymicros.net server; this field will be programmed by MICROS and is not dynamic
User	This is the site name, such as Prod 1, Prod 2; this field will be programmed by MICROS and is not dynamic
Password	Password for connecting to the URL; this field will be programmed by MICROS and is not dynamic
Export Type drop-down list	Export types include Inventory Totals, Menu Item Cost, and Inventory Definition. This is a mandatory field.
Location drop-down list	This drop-down identifies to which location the export applies; this is a mandatory field.
Export Date drop-down list	This drop-down determines for which date the export will run; this is a mandatory field
Log Detail drop-down list	This drop-down list determines to what detail the logs will contain. Options include High, Medium, or Low.
Synchronize	Select this once to begin the export process.

To Sync Information to mymicros.net

As mentioned previously, information can be synced from the myinventory application to the mymicros.net reporting application. To sync over information:

1. The Host, User, and Password fields will be populated with the correct organization information



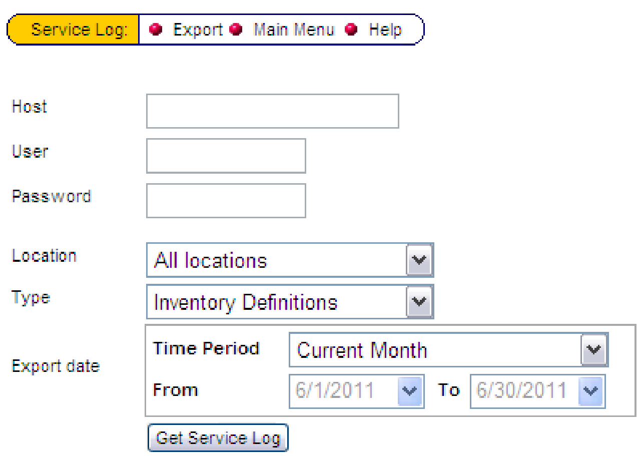
2. Select the Export Type, Location, Export Date, and Log Detail
3. Click Synchronize

The information will be synced over.

Recall a Service Log

To recall a Service Log:

1. Click Service Log from the Top Menu Bar
2. Enter Host, User, Password
3. Select Location, Type, Export Date

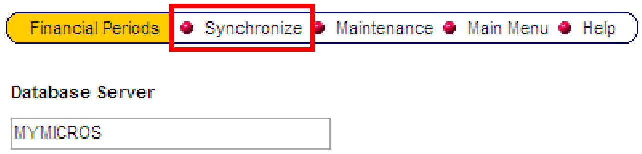


4. Click Get Service Log

Financial Periods

Financial Periods must be synced from mymicros.net for use in myinventory. Once synced, they can be assigned to Count Cycles to indicate when an Inventory Count should be completed. This is useful for organizations whose Financial Periods do not coincide with a specific day or the end of the month.

To sync Financial Periods from mymicros.net, select the Financial Periods module from the Maintenance Menu. Click Synchronize from the Top Menu Bar:



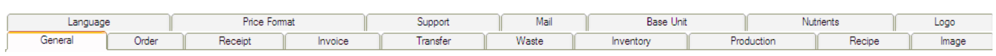
Financial Periods from mymicros.net will be synced to myinventory. Each Financial Period must be assigned to a Count Cycle.

Settings

The Settings page is where a System Administrator can determine how an organization will operate and indicate the overall look and feel of the myinventory application. From Settings, a Sys Admin can perform functions such as determining how a page will look in its default state, how search results will sort, or how Inventory Counts will be grouped, amongst other possibilities.

The Settings Overview Window

The first page you will see after accessing the Settings module is the Overview window. On this window is a number of tabs:

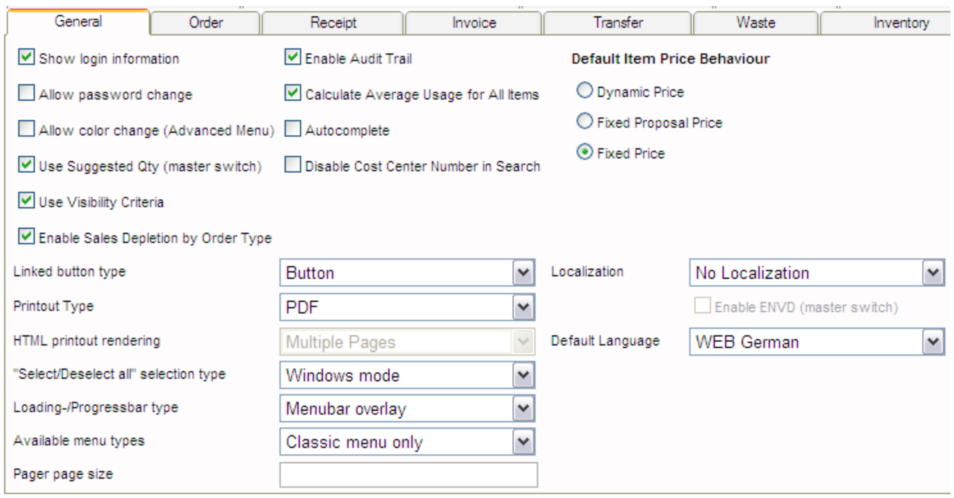


The following sections describe the Settings screen elements on the tabs.

Top Menu Bar

Menu Item	Description
Save	Saves the current settings
Reload Languages	Reloads the Language data assigned to you
Reload Settings	If changes had been made but not yet saved, this option will restore the Settings to the last saved occurrence
Main Menu	Return to the Main myinventory Menu
Help	Launch the Help file

General Tab



- Show login information – enabling this option will show login information at the top of the screen on the Main Menu page
- Allow password change – enabling this allows Users the ability to change their own password

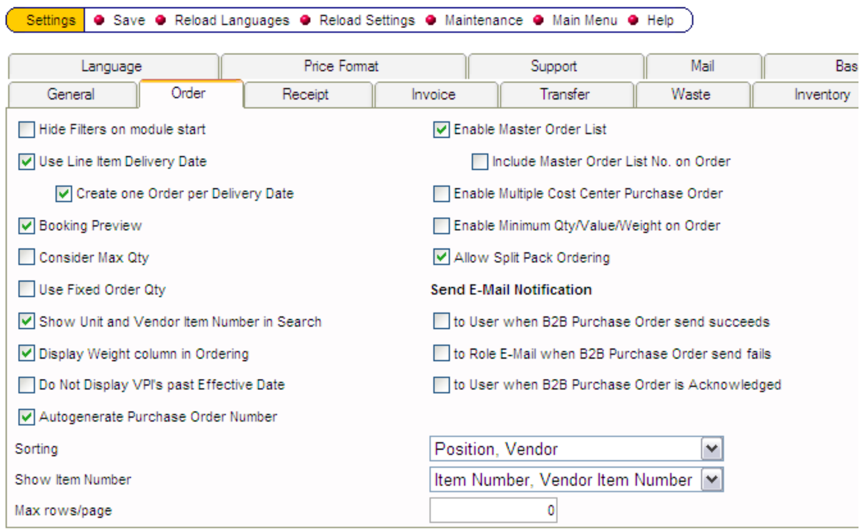
Note	*This feature should not be enabled since passwords are synced over from mymicros.net.*

- Allow color change (Advanced Menu) – this will give Users the ability to customize colors
- Use Suggested Qty (master switch) – enable this function to turn on the ability to use Suggesting Quantity Ordering (PAR or Forecasted)
- Use Visibility Criteria – enable this function to have the ability to use/apply Visibility Criteria
- Enable Sales Depletion by Order Type – enable this function to allow sales depletion by Recipe Assignment per Order Type and Price Level
- Enable Audit Trail – enabling this will allow the User to view change history for certain modules
- Calculate Average Usage for All Items – enable this option to allow the MIA2 Job to calculate the Average Usage for all Items. If disabled, the Average Usage will only be calculated for Items/Item Groups that are configured to use Suggested Ordering by Net Sales or Average Usage.
- Autocomplete – enable this function to turn on Autocomplete Text search capabilities
- Disable Cost Center Number in Search – Numeric entry with Autocomplete enabled will search Cost Center names only

- Default Item Price Behavior – this allows the User to indicate the default setting for Item Price Behavior (Used for Vendor Purchase Items)
  - Dynamic Price – price can be changed at anytime (based on User Rights)
  - Fixed Proposal Price – price can only be changed in Receiving, not in Ordering (based on User Rights)
  - Fixed Price – price cannot be changed anywhere
- Linked button type – determine the functionality of the page, i.e. decide if fields will be buttons, links, or labels
- Printout Type – select printout type: PDF or HTML – PDF is recommended
- HTML printout rendering – if HTML is selected as the printout type, then this determines how the HTML printouts will appear, either in multiple pages or single pages
- “Select/Deselect all” selection type – there are 2 modes for the “Select/Deselect all” option. Windows mode allows user to select the “V” and select all of the options; toggle mode allows Users to select the “V” and deselect the selected and select the unselected
- Loading/Progress Bar type – determine what type of Loading/Progress bar is displayed while actions are processed
  - Off – selecting this turns off the loading bar
  - Menubar Overlay – selecting this will cause the Top Menu Bar to act as the Loading/Progress bar
  - Pop Up Bar – selecting this will cause a pop up bar to appear with the loading status information
  - Use global setting (web.config) – select this will use the Loading Bar assigned by the local Hosting Center
- Available Menu Types – Determine how the organization’s layout will be configured. Options include:
  - Advanced & Classic Menu – selecting this will allow Users to configure either the Advanced or the Classic Menu
  - Advanced Menu Only – selecting this will enable the Advanced Menu
  - Classic Menu Only – selecting this will enable the Classic Menu
  - Collapse Menu Only – selecting this will enable the Collapse Menu
  - Use global setting (web.config) – selecting this will set the menu to the global setting (Set to Advanced and Classic in the United States)
- Recipe Pictures root – in this field, enter the path for the directory where you keep your recipe pictures (provided by the mymicros.net group)
- Pager page size – suggested quantity is 100; usually any more than 1000 records will cause the application to run slowly

- Localization – if Russian Localization is required, setting this to Russian Requirements will enable legal information to be printed on reports
- Enable ENVD (master switch) – used for Russian Localization only
- Default Language – indicates the Default Language to be used by the organization when Users are added directly through myinventory (not recommended)

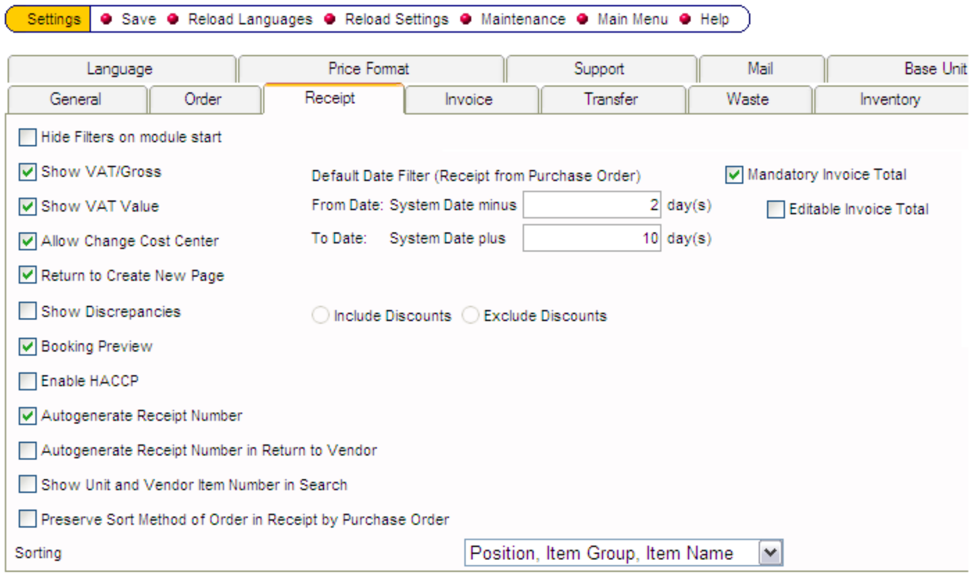
Order Settings Tab



- Hide Filters on module start – do not display available filters when the Ordering module is first opened
- Use Line Item Delivery Date – set whether or not Users will be able to assign specific delivery dates for different Items
- Create one Order per Delivery Date – creates a separate Purchase Order for each Delivery Date
- Booking Preview – enabling this option will automatically display a PDF version of the Order. If more than one Order is placed, the lowest Order number will be displayed
- Consider Max Qty – if the quantity of an Item being order is more than the Max Qty, this feature will prevent the Order from being placed.
- Use Fixed Order Qty – if this is enabled, the system will use the Fixed Order Qty entered for Vendor Purchase Items
- Show Unit and Vendor Item Number in Search – displays the Unit and Vendor Item Number when searching for Items
- Display Weight column in Ordering – displays the weight of Items on an Order
- Do Not Display VPI's past Effective Date – enabling this will cause any VPI past its effectivity to be left off the Purchase Order

- Autogenerate Purchase Order Number – if enabled, the system will create a Purchase Order number automatically
- Enable Master Order List – enables the Master Order List feature
- Include Master Order List No. on Order – enabling this will include the Order List number on the Order printout
- Enable Multiple Cost Center Purchase Order - this allows Purchase Orders to support multiple Cost Centers on a single Order. When an Order is booked with more than one Cost Center defined, a separate Order will be created for each Cost Center. This feature may not be used with Order Lists.
- Enable Minimum Qty/Value/Weight on Order – this allows the User to specify a Minimum Qty, Value, or Weight per Order as per Vendor requirements
    - Enable Minimum Total Qty on Order - Use for Vendors with an Item Quantity Minimum. Enter the amount in the form of a whole number
    - Enable Minimum Quantity per Item on Order - Use when an Item has a Minimum Quantity that must be Ordered. This is defined in the Vendor Purchase Catalog
    - Enable Minimum Total Value on Order - Use for Vendors with a Value Minimum. Enter the amount, up to one decimal place
    - Enable Minimum Total Weight on Order - Use for Vendors with an Order Weight Minimum. Enter the weight, up to one decimal place
- Allow Split Pack Ordering - this allow Users to flag Items that are able to be ordered as a split pack from a B2B Vendor, i.e. a half case instead of a whole case
- Send E-Mail Notification... – enable these options in accordance with what types of notifications your organization wants to receive when Ordering via B2B
- Sorting – determines how Order details will sort
- Show Item Number – identify which referencing number will be used; options include None, Item Number, Vendor Item Number, or Item Number and Vendor Item Number
- Max rows/page – determine how many rows will be visible on a page before turning into a pager page; usually any more than 1000 rows will cause the application to run slowly

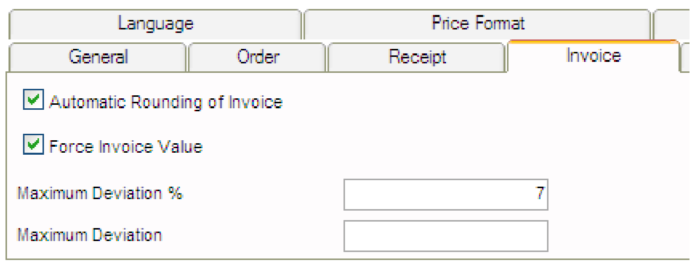
Receipt Settings Tab



- Hide Filters on module start – do not display available filters when first opening the module
- Show VAT/Gross – show VAT/Gross taxes in Receipts
- Show VAT Value – show VAT Value in Receipts
- Allow Change Cost Center – allows the User to change the Cost Center on the Receipt
- Return to Create New Page – enable this to return to the Create New page after closing a document in Receiving
- Show Discrepancies – displays any discrepancies between the Purchase Order and the Receipt. Select whether to include or exclude discounts
- Booking Preview – enabling this option will automatically create a PDF document
- Enable HACCP – enables HACCP fields and requirements
- Autogenerate Receipt Number – if enabled, the system will create a Receipt Number automatically
- Autogenerate Receipt Number in Return to Vendor - if enabled, the system will create a Receipt Number for a Return to Vendor automatically
- Show Unit and Vendor Item Number in Search – displays the Unit and Vendor Item Number when searching for Items
- Preserve Sort Method of Order in Receipt by Purchase Order – uses the Sort Method defined in the Purchase Order

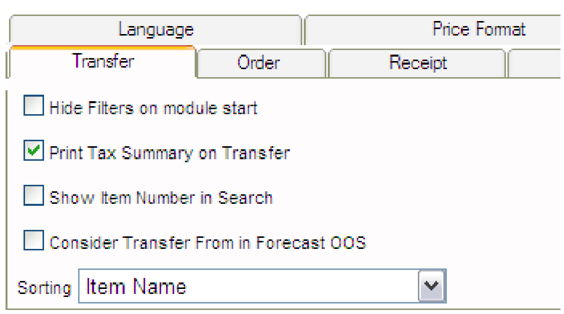
- Default Date Filter – defines the default date filter that will be used for Receiving by Purchase Order
- Mandatory Invoice Total - if enabled, the User must enter an Invoice Total when creating a Receipt as Invoice.
    - Editable Invoice Total - if enabled, the Invoice Total may be edited in the Receipt Detail. (User must have Edit Invoice Total in Receiving Right enabled)
- Sorting – determines Receipt Detail Sort Order

Invoice



- Automatic Rounding of Invoice – enabling this will round fractional Invoice totals
- Force Invoice Value – if enabled, the User is forced to enter an Invoice Value for an Invoice document
- Maximum Deviation % – the maximum allowed percentage deviation between the Invoice and the entered Invoice value
- Maximum Deviation – the maximum allowed value deviation between the Invoice and the entered Invoice value. The value overrides the percentage deviation, i.e. if the percentage deviation is in the allowed range but the value deviation is too high, the system will not allow the Invoice to be approved.

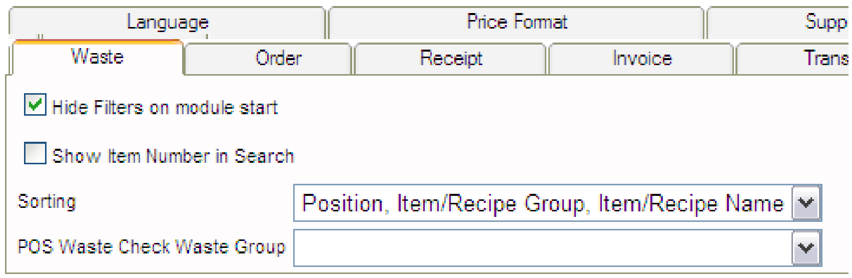
Transfer



- Hide Filters on module start – do not display available filters when first opening the module

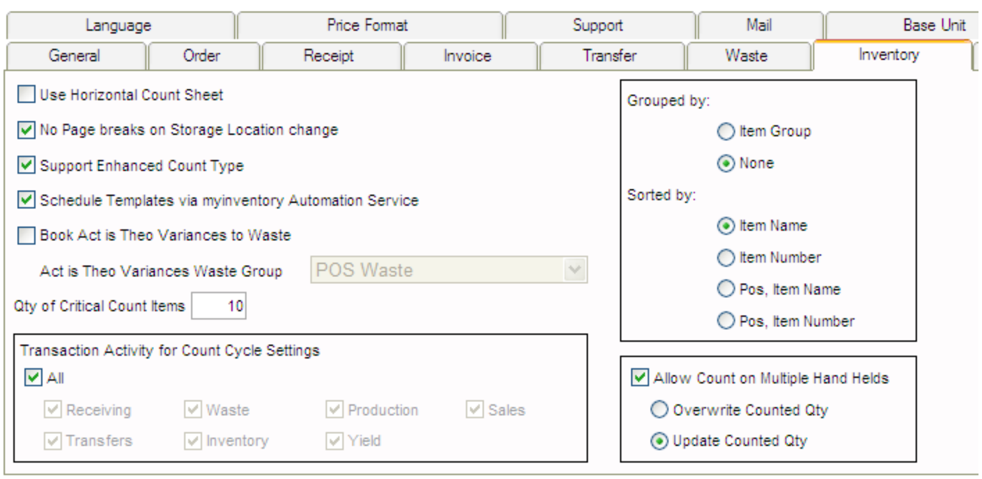
- Print Tax Summary on Transfer – enable this to have Tax Summary information printed on the Transfer
- Show Item Number in Search – displays the Item Number in a search
- Consider Transfer from in Forecast OOS – enabling this will include the requested and delivered quantities in the Forecast Out of Stock module
- Sorting – determine in what order Transfer details will sort

Waste



- Hide Filters on module start – do not display available filters when first opening the module
- Show Item Number in Search – displays the Item Number in a search
- Sorting – determines what order Waste documents will be sorted
- POS Waste Check Waste Group – indicates the Waste Group that POS Waste Checks will be applied to

Inventory

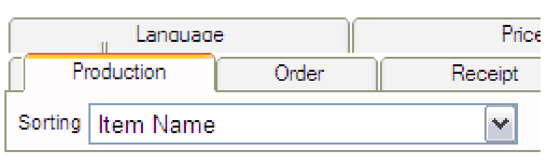


- Use Horizontal Count Sheet – enable this function if you would like to view count sheets in a horizontal format as opposed to a vertical format – vertical is the default

> *Note* *If this is enabled…*
> *Only 4 Units will appear in the count; if more than 4 Units are set in Manage Store, only the first 4 will appear.*
> *There is no longer a preview count option – preview count adds 3 columns to the report and, in a horizontal layout, there is no room.*

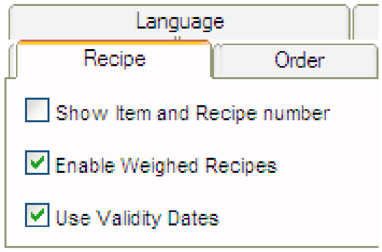
- No Page breaks on Storage Location changes – enable this function to eliminate page breaks between Storage Locations on print outs
- Support Enhanced Count Type – enables Enhanced Counts in Count Cycles. Enhanced Counts are used with Midday Counts/Spot Checks, and will update the Stock on Hand of the counted Inventory Items when the Count is booked.
- Schedule Templates via myinventory Automation Service – enabling this option will add a new MIA2 Job (Process Individual Count Cycles) that provides more flexibility in handling Count Cycles
- Book Act is Theo Variance to Waste – if No Inventory Variance (ACT is Theo) is used for Items/Item Groups, the variance between the two will be booked for the selected Waste Group
- Quantity of Critical Count Items – enter the amount of Items to be included in Critical Counts (Critical Count Items are those with the highest variance between Actual and Theoretical quantity in the last Period Close Count)
- Transaction Activity for Count Cycle Settings - Define which Transaction Activity will be considered when creating a Count Cycle Inventory with 'Only Items with Activity in Specified Time Period' enabled
- Grouped by – determines how Items will be grouped in Inventory Counts
- Sorted by – determine how Items will be sorted in Inventory Counts
- Allow Count on Multiple Hand Helds - Allows a single Inventory Count to be assigned to more than one Hand Held
  - Overwrite Count Qty - Overwrite previously uploaded Count values with the latest values
  - Update Counted Qty - Consolidate all Count values that have been uploaded

Production



- Sorting – determines how Items will be sorted in Production

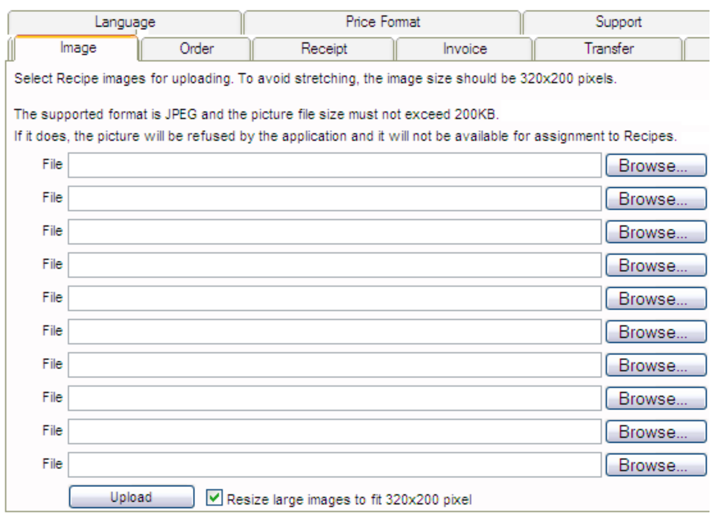
Recipe



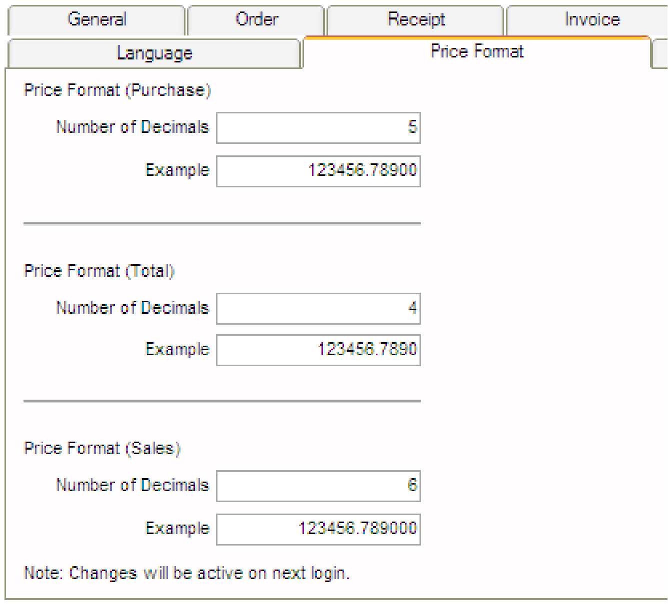
- Show Item and Recipe number – displays the Item number and Recipe number in the Recipes module
- Enable Weighed Recipes – allows the User to configure Recipes to deplete by weight
- Use Validity Dates – allows the User to assign Validity Dates to Recipe Ingredients

Image

The Image tab is where Recipe photos may be uploaded for use in the Recipes module. The system supports JPEG files that are no larger than 200KB.

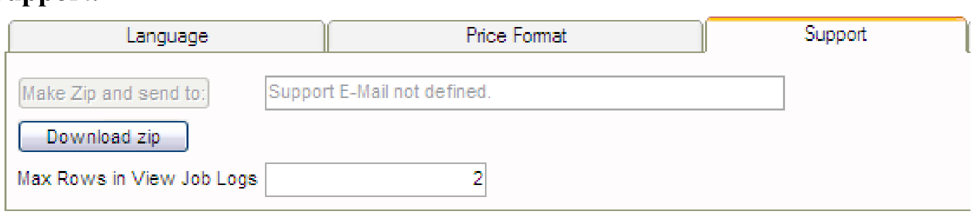


Price Format



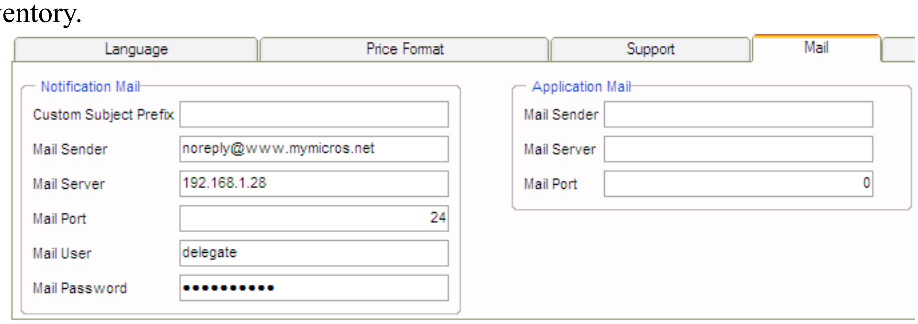
The Price Format tab allows the User to determine in what format prices should appear throughout the system. Enter the number of decimal places and the system will populate an example below.

Support.



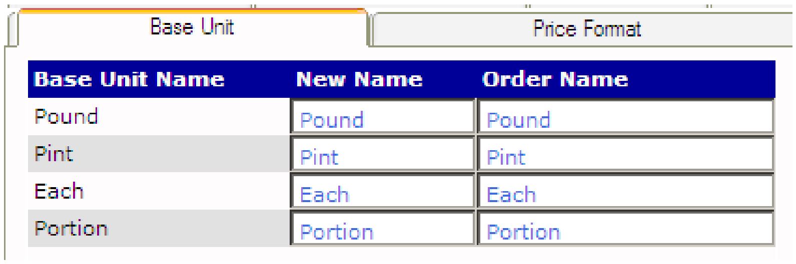
Mail

The Mail tab contains the configuration options for sending email from myinventory.



Base Unit

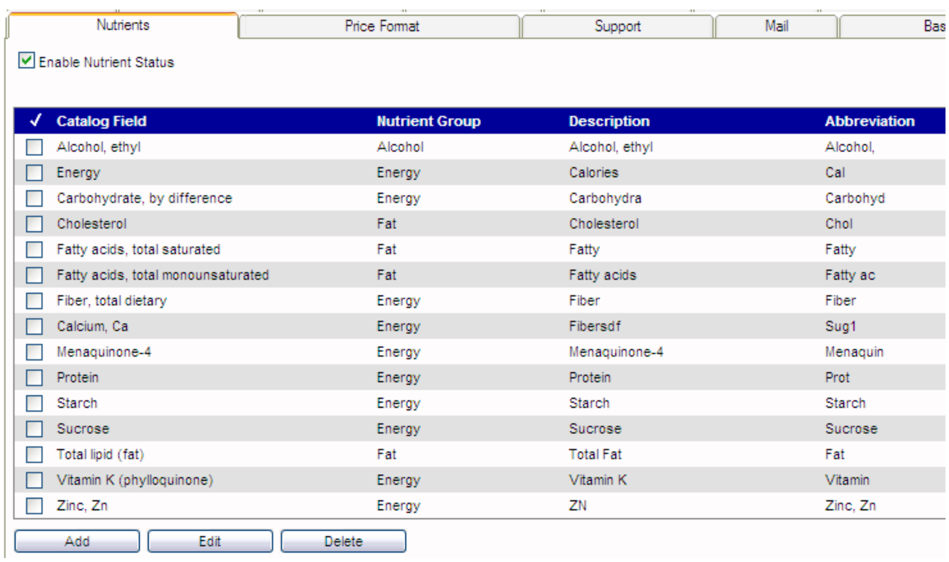
This tab is where the Base Unit naming conventions are determined for the system. An organization may decide to change the name of the Base Unit that appears throughout the application. To do so, type the chosen name into the New Name column, and the Order Name column if necessary, and select Save.



Base Unit Name	New Name	Order Name
Pound	Pound	Pound
Pint	Pint	Pint
Each	Each	Each
Portion	Portion	Portion

Note *Only the Base Unit Name may be changed, not the Base Unit configuration!*

Nutrients



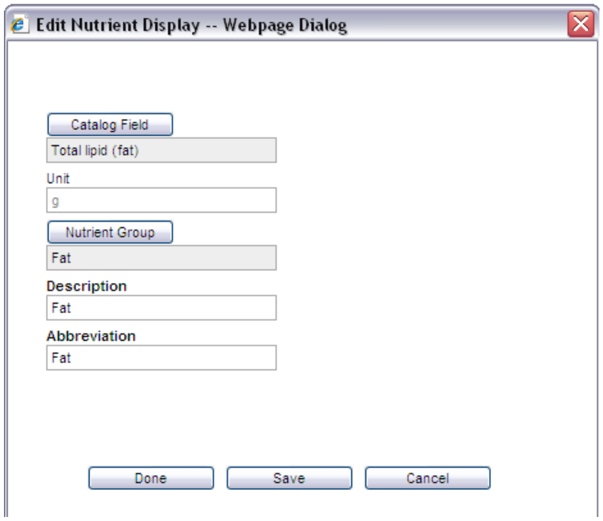
✓	Catalog Field	Nutrient Group	Description	Abbreviation
☐	Alcohol, ethyl	Alcohol	Alcohol, ethyl	Alcohol,
☐	Energy	Energy	Calories	Cal
☐	Carbohydrate, by difference	Energy	Carbohydra	Carbohyd
☐	Cholesterol	Fat	Cholesterol	Chol
☐	Fatty acids, total saturated	Fat	Fatty	Fatty
☐	Fatty acids, total monounsaturated	Fat	Fatty acids	Fatty ac
☐	Fiber, total dietary	Energy	Fiber	Fiber
☐	Calcium, Ca	Energy	Fibersdf	Sug1
☐	Menaquinone-4	Energy	Menaquinone-4	Menaquin
☐	Protein	Energy	Protein	Prot
☐	Starch	Energy	Starch	Starch
☐	Sucrose	Energy	Sucrose	Sucrose
☐	Total lipid (fat)	Fat	Total Fat	Fat
☐	Vitamin K (phylloquinone)	Energy	Vitamin K	Vitamin
☐	Zinc, Zn	Energy	ZN	Zinc, Zn

- Enable Nutrient Status -- this option enables Nutrient Status visibility in the Items and Recipes modules.

The specific Nutrients that an Organization would like to be displayed in an Item's Nutrient information is maintained in this tab.

To Add a Nutrient

To add a Nutrient to the database, select the Add key. The window that appears contains fields in which to enter the Nutrient information:



1. Choose a Nutrient from the Nutrient Catalog in the Catalog field. The Unit will be populated from the Catalog; this field is not editable.
2. Indicate the Nutrient Group assignment
3. Enter a Description for the Nutrient. The Description will be how the Nutrient is identified throughout myinventory. This field supports up to 25 characters.
4. Define an Abbreviation for the Nutrient, with a maximum of 8 characters. The Abbreviation should be an alternate name for the Nutrient that will be used in lieu of the Nutrient Description in areas where display space is a consideration.
5. Selecting Done will save and close the window, while updating the Nutrients tab with the new information. Selecting Save will save the information and keep the window open. Cancel will close the window without saving any changes.

To Edit a Nutrient

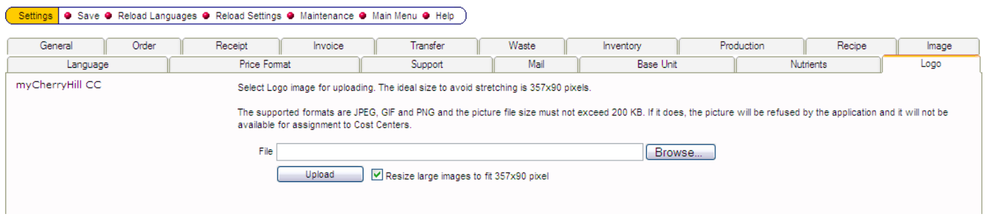
1. Select the row containing the Nutrient and click Edit.
2. Make the necessary changes in the window and select Done or Save. Select Cancel to disregard changes made.

To Delete a Nutrient

To delete a Nutrient, select the row containing the Nutrient and then select the Delete Key.

Logo

This tab allows you to upload your organization’s logo to further personalize the myinventory experience. The supported formats are JPEG, GIF and PNG. The logo may not exceed 200KB; if it is too large, an error message will result.



Configuration

The Configuration module allows MICROS to adjust the internal settings of the myinventory application. It is in this module where preferences and settings regarding options bits are enabled. Under typical circumstances, the User will never need to access this area and, therefore, should not attempt to configure anything in this module.

Import Master Data

The Import Master Data module is used by MICROS to import an organization’s data into the system, which saves a significant amount of time for Users. MICROS will provide an organization with the Excel spreadsheet to complete. Once returned, MICROS will perform the import.

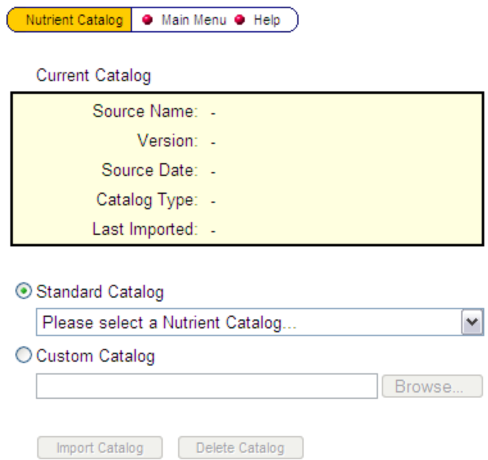
Nutrient Catalog

The Nutrient Catalog module is where Nutrient Catalogs can be Imported and Updated to the myinventory application. There are two Catalog Import options - Standard and Custom. A Standard Catalog is one that has been created by an agency, such as the USDA, and formatted for use with myinventory.

The Custom Catalog option allows the User to browse to a Catalog contained in a Windows folder and upload it to myinventory. A Custom Catalog is a Nutrient Catalog that has been created externally, formatted for use with myinventory and is not incorporated as a Standard Catalog for general use. This could be created by an Organization that contracted with a third party to document the Nutritional information for their menu offering.

Nutrient Catalog Window

The Nutrient Catalog module consists of one window in which to administer Imports and Updates to the Nutrient Catalog:

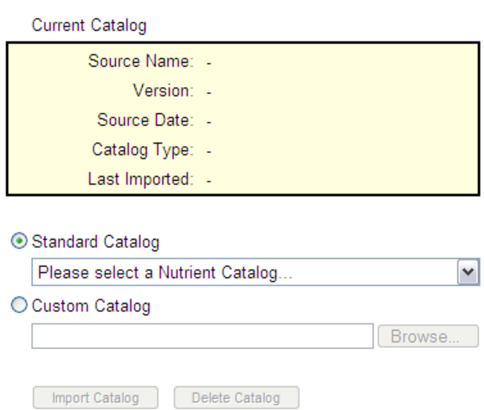


The following section describes the elements contained in the Nutrient Catalog window.

Top Menu Bar

Menu Item	Description
Main Menu	Return to the Main myinventory menu.
Help	Launch the Help file.

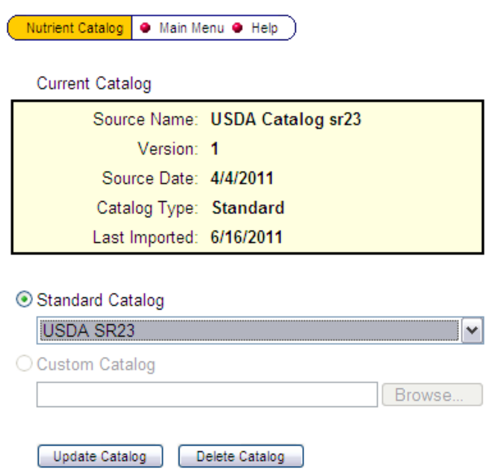
Additional Screen Elements



Menu Item	Description
Current Catalog	This area contains information pertaining to the currently loaded Nutrient Catalog. This will only display information if a Catalog has been loaded
Standard Catalog	To choose a Standard Catalog to Import, select one from the drop down field
Custom Catalog	To choose a Custom Catalog, use the Browse key to select the file from your hard drive
Import Catalog	This will be enabled when a Catalog has been chosen in one of the Catalog fields. Select this key to begin the Import. Once a Catalog has been Imported, this key will change to say Update Catalog.
Delete Catalog	This will delete the currently loaded Catalog

Import a Catalog To Import a Nutrient Catalog:

1. Select either a Standard Catalog from the drop down field, or browse to a Custom Catalog
2. Select Import Catalog. The Import may take time, depending on the speed of your browser
3. When the Import is complete, a notification will be displayed. Select OK and the Nutrient Catalog information will be visible in the Current Catalog area:



Once a Nutrient Catalog is loaded in the application, the Import Catalog key will change to Update Catalog and the Standard Catalog drop down will only include Catalog variations, i.e. a Catalog that was released in 2006 as well as one from 2008, from the same agency as the current catalog.

To Update a Nutrient Catalog

When an updated Catalog is available in the Standard Catalog drop down field:

1. Select the new Catalog
2. Click the Update Catalog key
3. When finished, the Updated Catalog information will be displayed in the Current Catalog area.

To Delete a Nutrient Catalog

To delete the current Nutrient Catalog:

1. Select the current Catalog from the drop down field
2. Click the Delete Catalog key
3. When finished, the Catalog information will no longer be visible in the Current Catalog area.

List Management

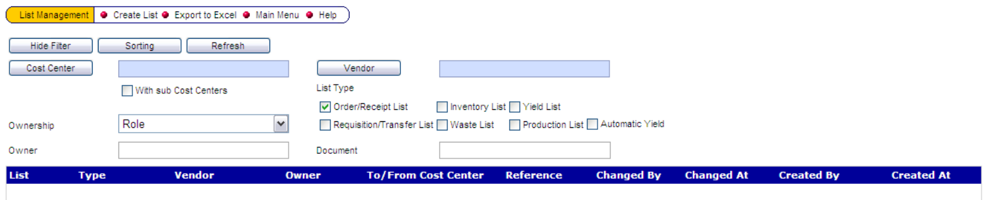
In List Management, you can create new Lists or manage existing Lists. You can create Lists in many other modules, but only in List Management can you create a List while not creating an Order, Transfer, or other record.

You can create eight different types of Lists in the List Management Module:

1. Order (availability in Ordering allows for availability in Receiving, as long as there is only one Vendor being used)
2. Transfer
3. Inventory
4. Waste
5. Yield
6. Production
7. Master Order List
8. Automatic Yield

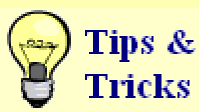
List Management Overview Window

List Management is where the User can create, modify, and delete Lists. The first page that appears is the List Management Overview window. Depending on how the filters are set up, this page may be void of Lists. Also, the following screen shows all Lists types; the availability of these List types is dependent upon Users Rights, which are determined by the System Administrator.



From this window, you can create a List or view a list of Lists.

The following section describes the elements contained in the List Management screen.



MICROS recommends doing everything List related (new, delete, rename, edit, etc) in this module. If you make changes to a List in the other modules, you may end up with duplicates.

For example, the existing Meat Order List is opened in the Ordering Module. A new Item is added to this List. The User clicks "Save as List" – the User must now pick a new name for the List because Lists cannot share the same name. The User selects Meat Order List 2. Now there is the original Meat Order List and the new Meat Order List 2 – both have identical Items; however Meat Order List 2 has 1 extra Item. Also, there is a suspended Order with all of the Items from list 2 – if the User forgets to delete this, there will always be an outstanding order.

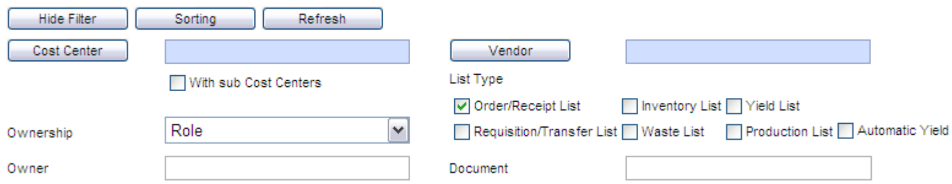
If the addition of this Item had been done in List Management, the current List could have been updated without having to create a whole new List.

Top Menu Bar

Menu Item	Description
Overview	Go to the subject area overview.
Create List	Initiates the Create List pop-up window. At this point, you will be asked to input a List Name and select a List Type

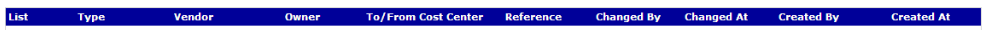
Menu Item	Description
Main Menu	Return to the Main myinventory Menu.
Help	Launch the Help file.

Additional Screen Elements



These filters behave as described in the Welcome section. For more information, please refer to the screen layout section of the Welcome page.

Information Bar

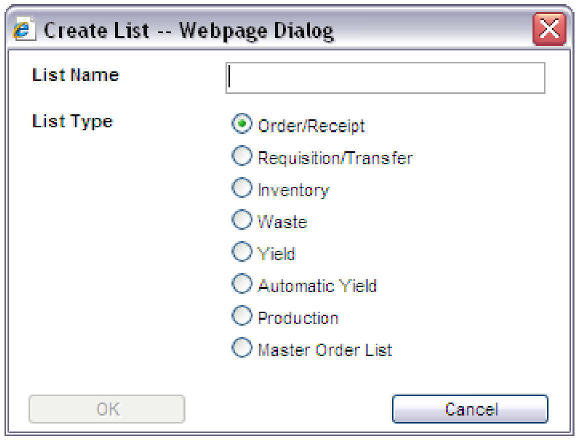


Menu Item	Description
List	Displays the name of the List
Type	Displays the type of List: Order, Inventory, Yield, Waste, ect.
Vendor	Displays the Vendor the list pertains to, if applicable
Owner	Displays the Owner of the List
To/From Cost Center/ Store	Displays the Cost Center/Store where this List was created, and where it is being Transferred, if applicable.
Reference	Displays additional information from the Reference field
Changed By	Displays the User who last updated the List
Changed At	Displays the date and time of the last update
Created By	Displays the User who created the List
Created At	Displays the date and time when the List was created

Create a New List

For all Lists:

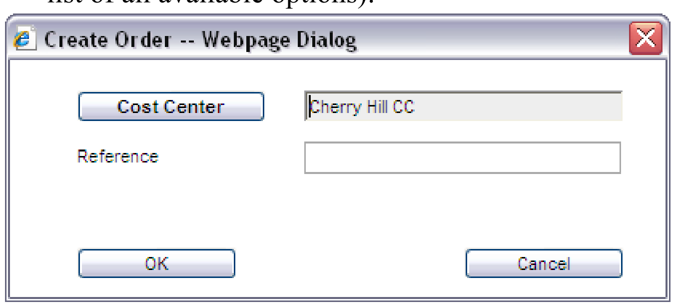
1. Select Create List from the Top Menu Bar; the Create List dialog box will appear:



2. Enter the List Name – try to be as descriptive as possible
3. Select the List Type
4. Click OK

Create an Order List:

1. Select a Cost Center/Store (place your cursor in the field and press Enter to see a list of all available options):

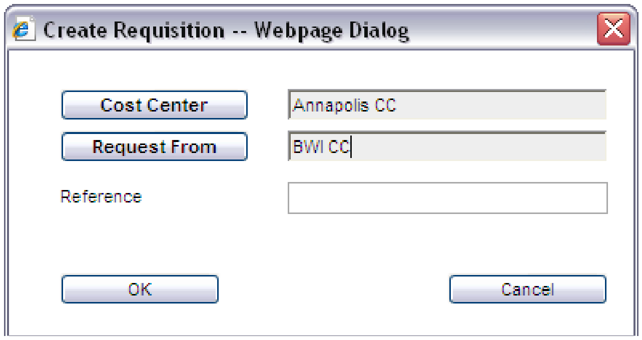


2. Enter any applicable notes in the Reference field and click OK

You will be directed to the Purchase Orders – List Management page where you will be able to add Items to the new Order List.

Create a Requisition/Transfer List:

1. Select a Cost Center/Store and the Request From information (place your cursor in the field and press Enter to see a list of all available options)

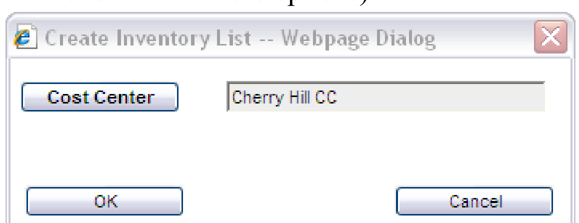


2. Enter any applicable notes in the Reference field and click OK

You will be directed to the Requisitions/Transfers – List Management where you will be able to add Items to the new Requisitions/Transfers List.

Create an Inventory List

1. Select a Cost Center/Store (place your cursor in the field and press Enter to see a list of all available options)

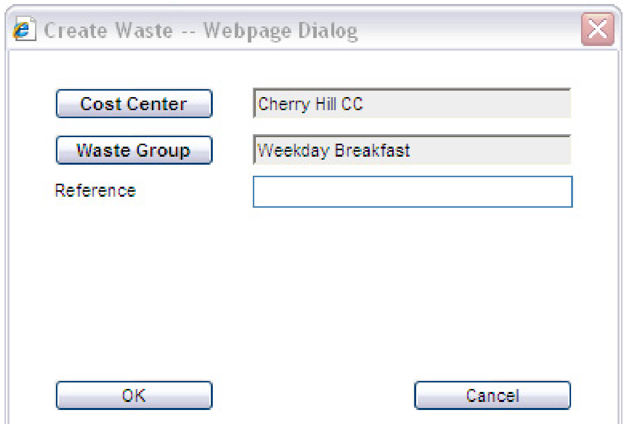


2. Enter any applicable notes in the Reference field and click OK

You will be directed to the Inventory – List Management page where you will be able to add Items to the new Inventory List.

Create a Waste List

1. Select a Cost Center and a Waste Group (place your cursor in the field and press Enter to see a list of all available options)

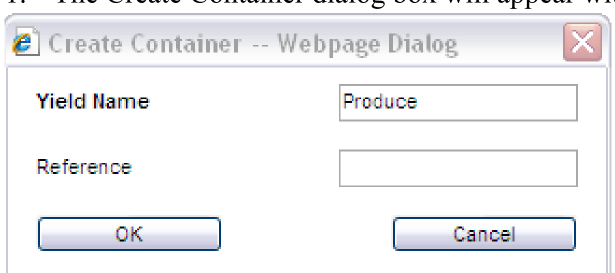


2. Enter any applicable notes in the Reference field and click OK

You will be directed to the Waste – List Management page where you will be able to add Items to the new Waste List.

Create a Yield List

1. The Create Container dialog box will appear with your Yield List name entered:

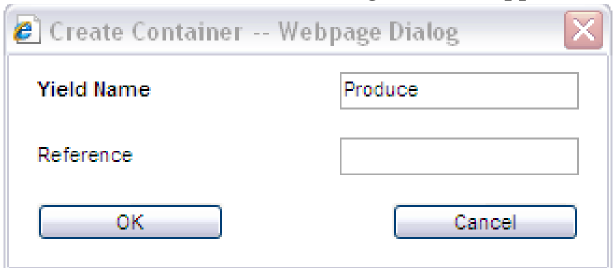


2. Enter any applicable notes in the Reference field and click OK

You will be directed to the Yield – List Management page where you will be able to add Items to the new Yield List

Create an Automatic Yield

1. The Create Container dialog box will appear with your Yield List name entered:

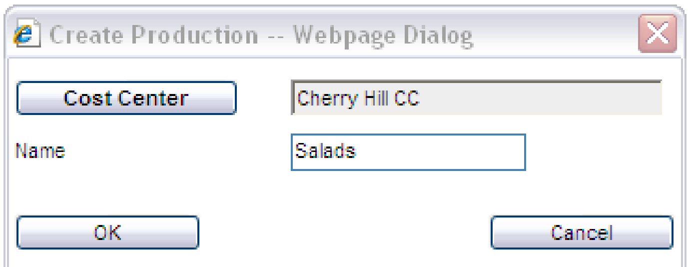


2. Enter any applicable notes in the Reference field and click OK

You will be directed to the Automatic Yield – List Management page where you will be able to add Items to the new Automatic Yield List

Create a Production List

1. The Create Production dialog box will appear with the Production Name entered

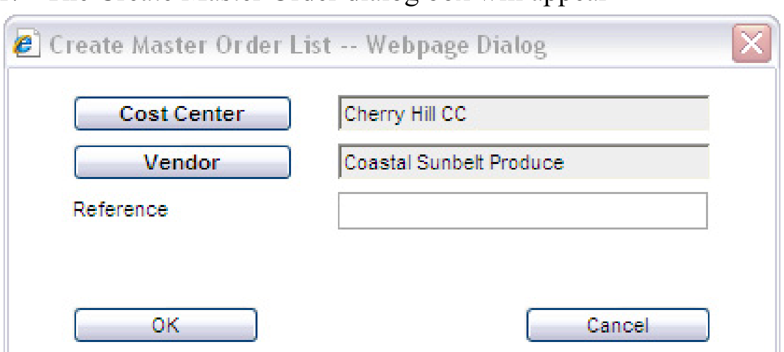


2. Enter a Cost Center
3. Click OK

You will be directed to the Production List Management page where you will be able to add Items to the new Production List.

Create a Master Order List

1. The Create Master Order dialog box will appear



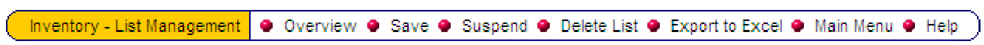
2. Select a Cost Center
3. Enter the Vendor for the Order List
4. Enter any applicable notes in the Reference field and click OK

You will be directed to the Master Order List Management page where you will be able to add Items to the new Master Order List.

The List Management Detail Window(s)

Some of the functionality of the Detail windows will differ based on the type of List selected. The Top Menu Bar will remain relatively the same, regardless of List type. The only difference in the Top Menu Bar amongst Lists is the Yield and Automatic Yield List Top Menu Bar. Instead of having “Delete List”, the Yield List Management Detail page has “Delete Container”. They will still function the same.

Top Menu Bar



Menu Item	Description
Overview	Go to the subject area overview.
Save	Saves the List
Save As…	Allows you to save the List, rename it, and continue working on the List under its new name
Suspend	This feature allows you to save the List and returns you to the Overview window where you can continue working on this suspended List at another time
Delete List	This deletes the current List completely and returns you to the Overview window
Preview	This option will open a PDF version of the current information. From here, you can print your List
Main Menu	Return to the Main myinventory Menu.
Help	Launch the Help file.

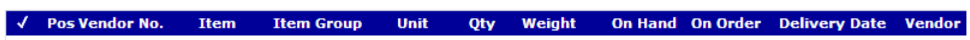
Order List Management Detail Window

The following section describes the Order List Management Detail Window.

Additional Screen Elements

Screen Element	Description
List	Displays the name of the Order List.
Cost Center	The Cost Center the List is assigned to
Reference	Additional information to be included
Visibility	Assign Visibility Criteria
Sorting	Displays a pop up window in which Sort Order may be defined
Edit Header/Footer	Allows the User to enter Header and Footer information for the Order List
Suggested	Enable this to use Suggested Ordering in this List
Special Offer List	Enable this to indicate that this is a temporary List. Assign Validity dates in the fields below

Information Bar

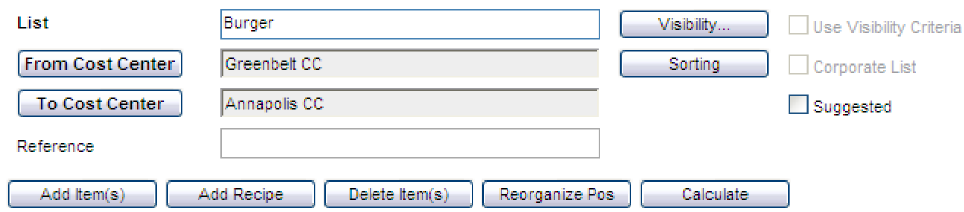


Screen Elements	Description
Pos	Position of the Item in the List
Vendor No.	Displays the Vendor No. for the Item
Item	Displays the Item name
Item Group	Displays the Item Group
Unit	Displays the Unit of Measure for the Item.
Qty	Displays the quantity of the Item to be Ordered
Weight	Displays the Weight of the Item
On Hand	Displays the Stock on Hand for the Item
On Order	Displays the current quantity on Order
Delivery Date	Date the Item will be delivered
Vendor	Displays the Vendor delivering the Item

Issue Requests/Transfers List Management Detail Window

The following section describes the Issue Requests/Transfers List Management Detail Window.

Additional Screen Elements



Screen Element	Description
List	Displays the name of the Issue Requests/ Transfer List
From Cost Center To Cost Center	These fields display from where the Items will be sent (From Cost Center) and to where the Items will be going (To Cost Center)
Reference	Allows you to enter additional information for this List.
Visibility	Assign Visibility Criteria
Sorting	Displays a pop up window in which Sort Order may be defined
Suggested	Enabling this option will allow the system to calculate Suggested Quantities for Items where the Order Method is defined as PAR or Actual Usage
Add Item(s)	Displays the Add Items pop-up window, in which Items may be added to the Issue Requests/Transfer List
Add Recipe	Displays the Add Recipe pop-up window, in which recipes may be added to the Issue Requests/Transfer List
Delete Item(s)	To use this key, first select an Item(s) by checking the box to the left of the Item. Click the Delete Item(s) key to delete Items from your Issue Requests/Transfer

Screen Element	Description
Reorganize Pos	Select this key to reorganize the Items or Recipes in the List
Calculate	Select this key to display a Total for the Issue Requests/Transfer list to be displayed at the bottom of the screen

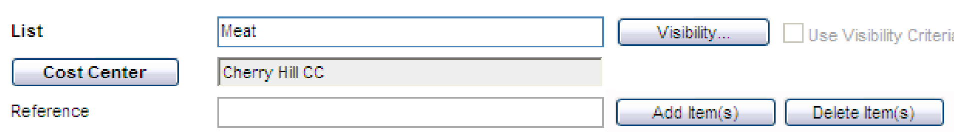
Information Bar

Screen Elements	Description
Pos	Displays the Position of the Item in the List
Item No.	Displays the Item Number
SOH	Displays the total Stock on Hand for the Item
Item	Displays the Item name
Item Group	Displays the Item Group for the Item
Unit	Displays the Unit of Measure for the Item.
Qty	Displays the quantity of the Item to be requested. This can be changed until the Requisition has been booked
Reference	Displays any Reference information that has been included for the Item

Inventory List Management Detail Window

The following section describes the Inventory List Management Detail Window.

Additional Screen Elements



Screen Element	Description
List	Displays the name of the Inventory List.
Cost Center	Displays the Cost Center name
Reference	Allows you to enter additional information for this List.
Visibility	Assign Visibility Criteria

Screen Element	Description
Add Item(s)	Displays the Add Items pop-up window, in which Items may be added to the Inventory List
Delete Item(s)	To use this key, first select an Item(s) by checking the box to the left of the Item. Click the Delete Item(s) key to delete Items from your Inventory List

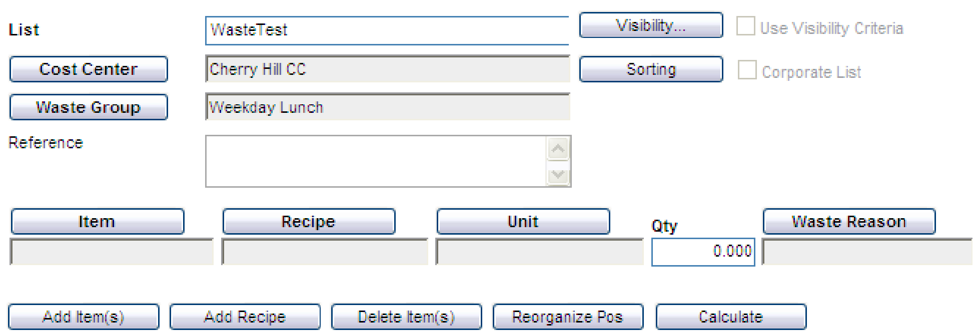
Information Bar

Screen Element	Description
Item No.	Displays the Item number
Item	Displays the Item name
Item Group	Displays the Item Group that the Item is assigned to

Waste List Management Detail Window

The following section describes the Waste List Management Detail Window.

Additional Screen Elements



Screen Element	Description
List	This displays the name of the Waste List.
Cost Center	Displays the Cost Center name
Waste Group	Displays the Waste Group
Reference	Allows you to enter additional information for this List.
Visibility	Assign Visibility Criteria

Screen Element	Description
Sorting	Displays pop up window in which Sort Order may be defined
Corporate List	Enable this to make the List accessible for the entire Organization
Item	Search for an Item in this field for quick entry onto the Waste List
Recipe	Search for a Recipe in this field for quick entry onto the Waste List
Unit	Enter the Unit for the chosen Item or Recipe for quick entry onto the Waste List
Qty	Enter the Qty of the Item or Recipe
Waste Reason	Select a Waste Reason for the Item or Recipe
Add Item(s)	Displays the Add Items pop-up window, in which Items may be added to the Waste List
Add Recipe	Displays the Add Recipe pop-up window, in which Recipes may be added to the Waste List
Delete Item(s)	To use this key, first select an Item(s) by checking the box to the left of the Item. Click the Delete Item(s) key to delete Items from the Waste List.
Reorganize Pos	Select this key to reorganize the Items or Recipes in the List
Calculate	Select this key to display a Total for the Waste List to be displayed at the bottom of the screen

Information Bar

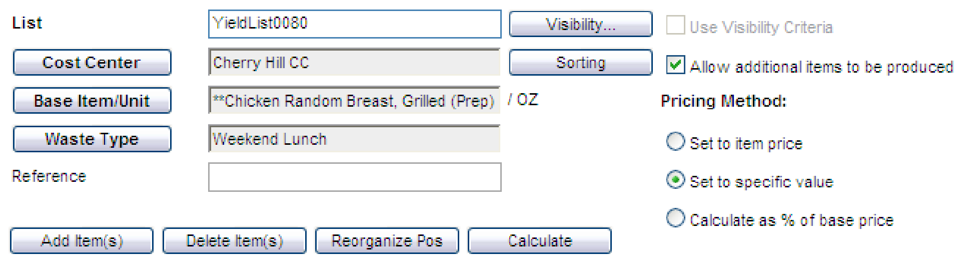
Screen Elements	Description
Pos	Displays the Position of the Item/Recipe
Item No.	Displays the Item No.
Item	Displays the Item name
Item Group	Displays the Item Group
Unit	Displays the Unit of Measure for this Item.

Screen Elements	Description
Qty	Displays the quantity of the Item that is being Wasted.
Waste Reason	Displays the Reason for the Waste

Yield List Management Detail Window

The following section describes the Yield List Management Detail Window.

Additional Screen Elements



Screen Element	Description
List	This displays the name of the Yield List.
Base Item/Unit	Item to be broken down/Base Unit of the Item to be broken down
Waste Type	Shows the Waste Type category that the Yield identifies with
Reference	Enter additional information for this List here.
Visibility	Assign Visibility Criteria
Sorting	Displays pop up window in which Sort Order may be defined
Allow additional items to be produced	Enable this option to allow the addition of extra Items to an existing Yield List
Pricing Method	Determine how Items are priced based on the Base Item. Set to item Price – sets the value to the price of the Base Item Set to specific value – User will determine price Calculate % of base price – this is a percentage of the Base Item price

Screen Element	Description
Add Item(s)	Displays the Add Items pop-up window, in which Items may be added to the Yield List
Delete Item(s)	To use this key, first select an Item(s) by checking the box to the left of the Item. Click the Delete Item(s) key to delete Items from the Yield List.
Reorganize Pos	Select this key to reorganize the Items in the List
Calculate	Select this key to display a Total for the Yield List to be displayed at the bottom of the screen

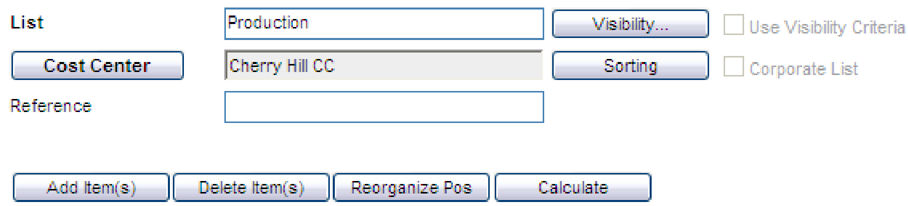
Information Bar

Screen Elements	Description
Pos	Displays the position of the Item in the List
Item	Displays the Item name
Item Group	Displays the Item Group
Unit	Displays the Unit of Measure for this Item.
Conversion	The conversion factor; for example, if the Base Unit is 1 lb., and the yield of that Item is measured by Each, the conversion factor that creates that 1 lb. into an Each is listed here. Base = 1 lb. converted to 2 – 8oz Each
%	
Price	Displays the final price of the Item after conversion

Production List Management Detail Window

The following section describes the Production List Management Detail Window.

Additional Screen Elements



Screen Element	Description
List	Displays the Production List name
Cost Center	Displays the name of the Cost Center where the Production List is effective
Reference	Enter information pertaining to the List here
Visibility	Assign Visibility Criteria
Sorting	Displays pop up window in which Sort Order may be defined
Corporate List	Enable this to make the List accessible for the entire Organization
Add Item(s)	Displays the Add Items pop-up window, in which Items may be added to the Production List
Delete Item(s)	To use this key, first select an Item(s) by checking the box to the left of the Item. Click the Delete Item(s) key to delete Items from the Production List.
Reorganize Pos	Select this key to reorganize the Items in the List
Calculate	Select this key to display a Total for the Production List to be displayed at the bottom of the screen

Information Bar

Screen Elements	Description
Pos	Displays the position of the Item in the Production List
Item	Displays the Item name
Item Group	Displays the Item Group name

Screen Elements	Description
Unit	Displays the Unit of Measure for this Item.
Whole Batch Only	Enabling Whole Batch Only will characterize the Production Item as being a whole of the Recipe. It is possible to create partial batches of a Production Item
Qty	Enter a value here to change the quantity of this Production Item

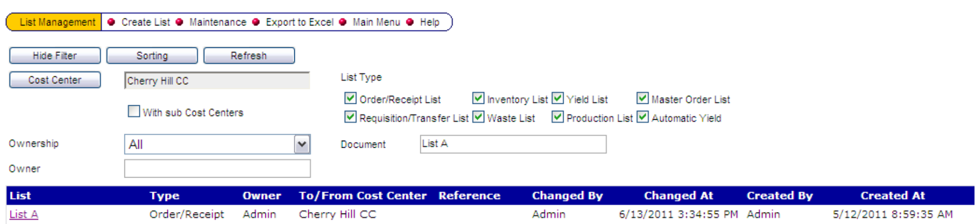
Deleting Items from a List

To delete Items, please refer to the Delete Items section of this document.

Opening and Modifying a List

When you first enter the List Management Overview window, there should be nothing populating the page. You must modify the filters and click refresh to view saved Lists, as well as enable at least one of the options under List Type. The more options you enable under List Type, the more results you will receive after clicking Refresh.

1. Enable 1 or more of the List Type options:
2. Click Refresh
3. The page will be loaded with results for the selected List Types:



Add Items to a List

Every List in the List Management module may be added to. Depending on the type of List you are working with, your options for what you are adding might be different. The steps, however, are very similar.

To add Items, please refer to the Add Items section of this document.

Deleting a List

To delete a List, please refer to the Deleting a Document section of this document.

Vendor Cost Center Profile

The Vendor Cost Center Profile module is a way to keep Cost Centers and Vendors communicating on an accurate level. More specifically, this means that Cost Centers can be assigned a specific number or identifying characteristics so that when their order goes to the Vendor, the Vendor does not confuse them with a different Cost Center and inadvertently send them the wrong products.

For example, many organizations setup Cost Centers by city; therefore, the likelihood of a duplicate city name exists. There's Jackson, Mississippi, Jackson, Missouri, Jackson, Wyoming, and the list of "Jacksons" goes on. Applying identifying numbers can decrease confusion and increase accuracy.

Tips & Tricks

This is very important for customers using B2B Interfaces with the Vendor.

The Vendor Cost Center Profile Overview Window

The first page you will see when accessing the Vendor Cost Center Profile module is the Overview window:

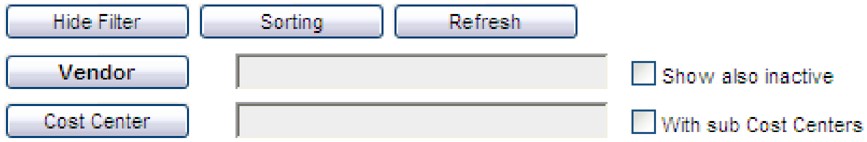
To see all available Cost Centers, you must first enter a Vendor.

The following sections describe the Vendor Cost Center Profiles screen elements.

Top Menu Bar

Menu Item	Description
Save	Saves the updated Cost Center information with regard to the Vendors
Export to Excel	Opens the current information in an Excel Spreadsheet
Main Menu	Return to the Main myinventory Menu.
Help	Launch the Help file.

Additional Screen Elements



These filters behave as described in the Welcome section. For more information, please refer to the Screen Layout section of the Welcome page.

Filters

Please refer to the Filters section of this document.

With Sub Cost Center - If this feature is enabled, all Cost Centers below the Cost Center selected will be displayed in the search results.

Create Customer Numbers for Cost Centers

To create a Vendor Cost Center Profile:

1. Select a Vendor (mandatory) from the Vendor field and click Refresh; a list of all Cost Centers assigned to the selected Vendor will be displayed:

Cost Center	Customer Number	Address	Phone	Fax	E-Mail	Contact	Delivery Info	Additional Info	Rating E-Mail
Annapolis CC									
Greenbelt CC									

2. Begin entering the identifying characteristics for each Cost Center
3. Click Save

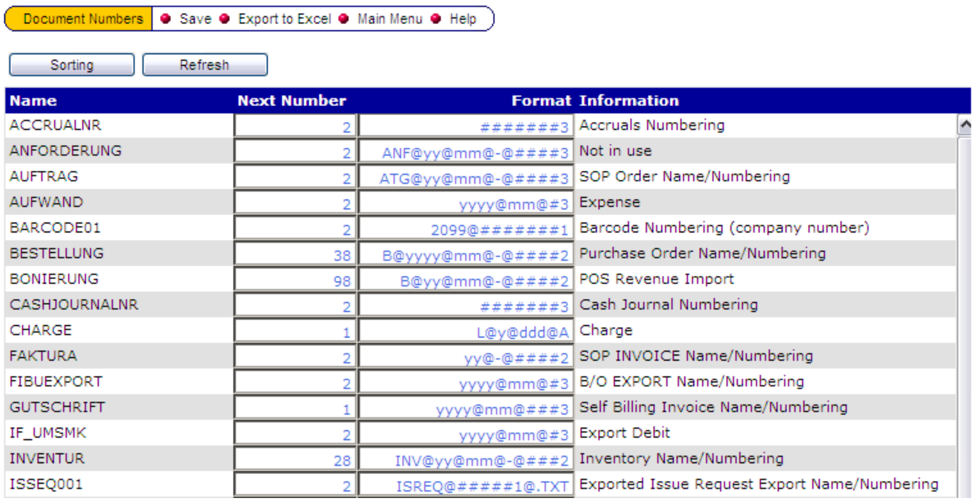
Your updated information will be saved. Now, when Cost Centers place their orders, identifying characteristics are on file so that Vendors know what store the deliveries are to go. Also, the delivery address will be included on the Purchase Order.

Document Numbers

Document Numbers is where Users can go to determine how their document numbers will be displayed and constructed. Every document has a format. For example, Inventory Counts are represented by INV@yy@mm@-@###2, which means Inventory Counts will look similar to: INV0709-0039. INV precedes the number, followed by a 2-digit representation of year, followed by a 2-digit representation of month, to be finished with a 4-digit value that increments by 1 with each new count. Purchase Orders are shown with the format B@yyyy@mm@-@####2, which means B precedes the number, followed with a 4-digit representation of year, followed by a 2-digit representation of month, finished with a 4-digit value that increments by 1 with each new Purchase Order.

Modify Existing Document Numbers

1. Select Document Numbers from below the Maintenance | Documents Configuration task
2. Select the value in the Format column:



Name	Next Number	Format	Information
ACCRUALNR	2	#######3	Accruals Numbering
ANFORDERUNG	2	ANF@yy@mm@-@####3	Not in use
AUFTRAG	2	ATG@yy@mm@-@####3	SOP Order Name/Numbering
AUFWAND	2	yyyy@mm@#3	Expense
BARCODE01	2	2099@#######1	Barcode Numbering (company number)
BESTELLUNG	38	B@yyyy@mm@-@####2	Purchase Order Name/Numbering
BONIERUNG	98	B@yy@mm@-@####2	POS Revenue Import
CASHJOURNALNR	2	#######3	Cash Journal Numbering
CHARGE	1	L@y@ddd@A	Charge
FAKTURA	2	yy@-@####2	SOP INVOICE Name/Numbering
FIBUEXPORT	2	yyyy@mm@#3	B/O EXPORT Name/Numbering
GUTSCHRIFT	1	yyyy@mm@###3	Self Billing Invoice Name/Numbering
IF_UMSMK	2	yyyy@mm@#3	Export Debit
INVENTUR	28	INV@yy@mm@-@###2	Inventory Name/Numbering
ISSEQ001	2	ISREQ@#####1@.TXT	Exported Issue Request Export Name/Numbering

3. Make any modifications:
   - Next Number - The module's next number. This field may be edited, however, make sure you do not use the same number twice.
   - Format - The document number's layout is configured here
   - Strings - Alphabetic characters can be used before or between separators (e.g.DEL, @VK@)
   - Separator - The @ symbol is used as a separator
   - Date - yy, yyy, mm, dd where y is the year, m is the month, and d is the date
   - ### - Number of digits (in this case, 3)
   - ..###1 - Consecutive numbering
   - ..###2 - The number starts at 1 every year
   - ..###3 - The number starts at 1 every month
   - ..###5 - The number starts at 1 every day
4. Click Save

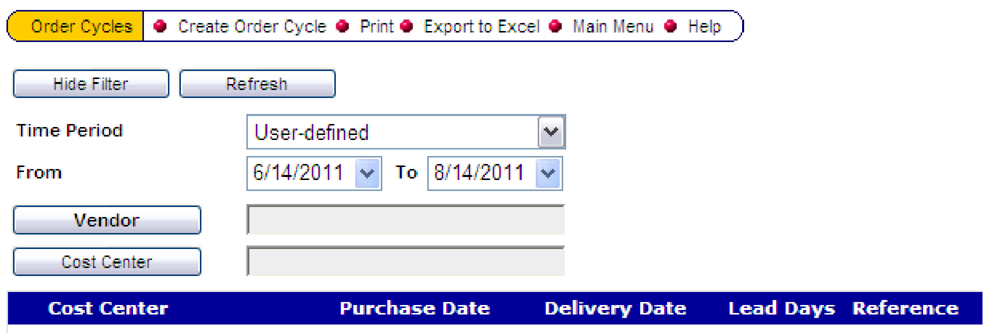
Order Cycles

Order Cycles is where you setup your Orders; specifically, when you place your Order and when your Order is received. Every organization has some sort of cycle of ordering. For example, you could order produce every Monday afternoon and it is delivered every Wednesday morning and order beer and wine on Wednesdays and have it delivered on Fridays. In this module, you will be able to setup your Order Cycles.

Note — *If the Vendor is set up to use Order Cycles, the Cycles will need to be set up for every Cost Center that is assigned to that Vendor.*

The Order Cycles Overview Window

The first page you will see after accessing the Order Cycles module is the Overview window:



Because Order Cycles are specific to a Vendor, you must first select a Vendor from the Vendor field in order to view any results. To see a list of available Vendors, place your cursor inside the Vendor field and press Enter. Click Refresh after selecting a Vendor to see your Order Cycles.

Tips & Tricks

MICROS recommends not using Order Cycles if the Vendor is prone to changing the schedule frequently. It is easier to enter dates manually than it is to change dates in Order Cycles for multiple stores.

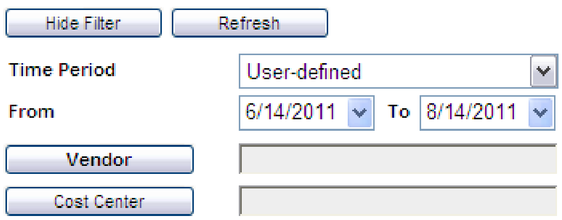
Also, if stores typically place Orders over a period of a few days (ex. Mon – Wed) and have all deliveries on a day later that week (ex. Friday), Order Cycles are not recommended since Orders cannot be booked outside of the schedule.

The following sections describe the Order Cycles screen elements.

Top Menu Bar

Menu Item	Description
Create Order Cycle	Select to create a new Order Cycle.
Print	This will open a PDF document in a browser that can be printed.
Export to Excel	Exports the currently displayed information into an Excel spreadsheet
Main Menu	Return to the Main myinventory Menu.
Help	Launch the Help file.

Additional Screen Elements

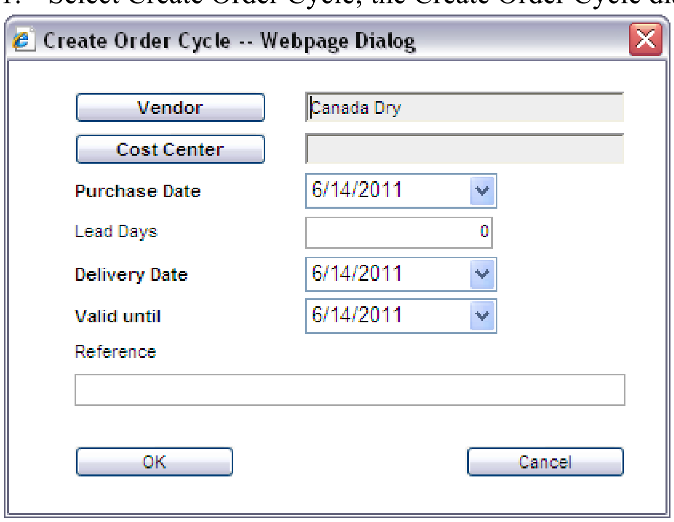


These filters behave as described in the Welcome section. For more information, please refer to the Screen Layout section of the Welcome page.

Create a New Order Cycle

To create a new Order Cycle, from the Top Menu Bar:

1. Select Create Order Cycle; the Create Order Cycle dialog box will be displayed:



a. Select a Vendor; to see a list of all available Vendors, put your cursor in the Vendor field and press Enter

b. Select a Cost Center; by selecting a Cost Center, you will be identifying the Order Cycle for that specific store; to see a list of all available Cost Centers, put your cursor in the Cost Center field and press Enter

c. Select a Purchase Date. The Purchase Date is the day the actual purchase is submitted to the Vendor

d. Select Lead Days. Lead Days are the days between the Order and the delivery

e. Select a Delivery Date. The Delivery Date is the day that the goods are delivered to the Cost Center

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Note *If the Purchase Date and the Delivery Date are actually running for multiple weeks/months, then this should be thought of as the day of the week the goods are purchased/ delivered.*

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f. Select a Valid Until date. By selecting this, you will be determining the length of time you would like your Order Cycle to continue. For example, you can set up the Order Cycle to recur for months or until the end of the year.

g. Enter Reference information, as necessary. This is an optional field.

2. Click OK

The new Order Cycle for that Cost Center will now be visible on the Order Cycles Overview window.

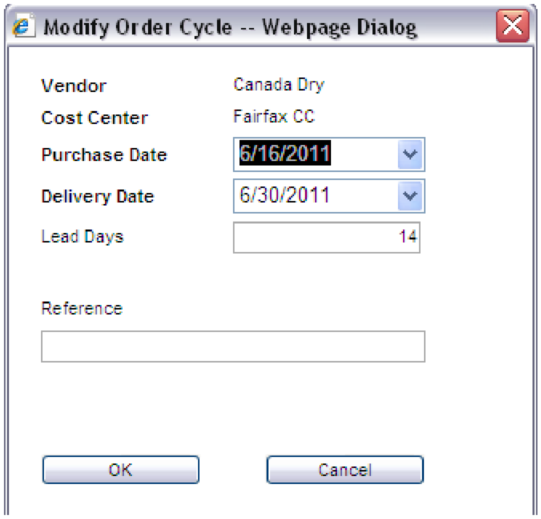
Modify an Order Cycle

To modify an existing Order Cycle:

1. Select an existing Order from the Order Cycle Overview window:

Cost Center	Purchase Date	Delivery Date	Lead Days	Reference
Fairfax CC	6/15/2011	6/15/2011	0	
▶ Fairfax CC	6/16/2011	6/30/2011	14	
Fairfax CC	6/17/2011	6/17/2011	0	
Fairfax CC	6/22/2011	6/22/2011	0	
Fairfax CC	6/24/2011	6/24/2011	0	
Annapolis CC	6/16/2011	6/23/2011	7	
Annapolis CC	6/23/2011	6/23/2011	0	

The Modify Order Cycle dialog box will be displayed:



2. Make necessary corrections; click OK

Your updates will be visible on the Order Cycle Overview window.

Tips & Tricks

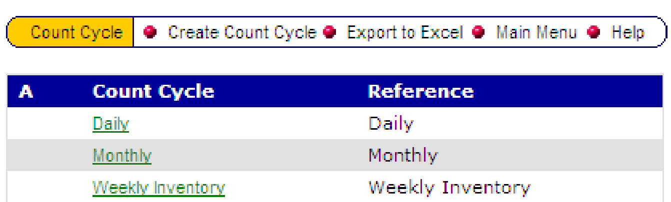
MICROS recommends not creating Order Cycles for longer than a few months at a time or over holidays. In situations such as these, the Order Cycle will need to be modified to accommodate any scheduling conflicts.

Count Cycles

The Count Cycles Module is where you setup your Inventories; specifically, when your location(s) count and book Inventories. Every organization has some sort of cycle of inventorying their goods, be it when they are received, at the end of the night, every Thursday, etc.

The Count Cycles Overview Window

The first page you will see after accessing the Count Cycles module is the Overview window:



Count Cycles determine when and with what frequency Inventory counts are taken. These can vary, depending on the organization and location, however, they should be able to be configured without causing too many problems among locations.

The following sections describe the Count Cycles screen elements.

Top Menu Bar

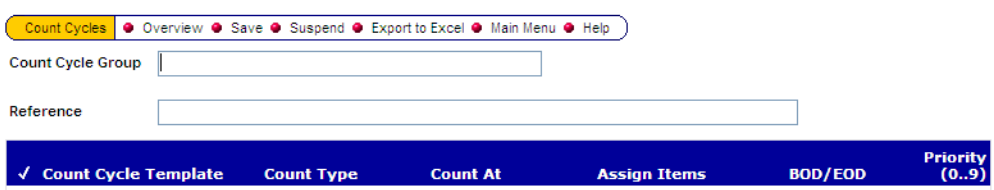
Menu Item	Description
Create Count Cycle	Select this to create a new Count Cycle
Export to Excel	Opens the currently displayed information in an Excel spreadsheet
Main Menu	Return to the Main myinventory Menu
Help	Launch the Help file

Information Bar

Menu Item	Description
A	Indicates if the Count Cycle is Active
Count Cycle	Displays the name of the Count Cycle(s)
Reference	Displays any information entered in regard to that Count Cycle

Create a New Count Cycle

1. Select Create Count Cycle from the Top Menu Bar
2. Enter a name for the Count Cycle in the Count Cycle Group field and any information necessary in the Reference field:

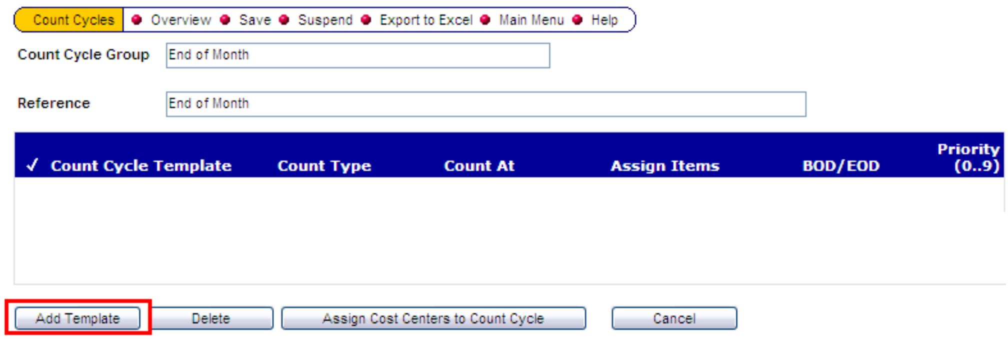


3. Click Save (or Suspend)

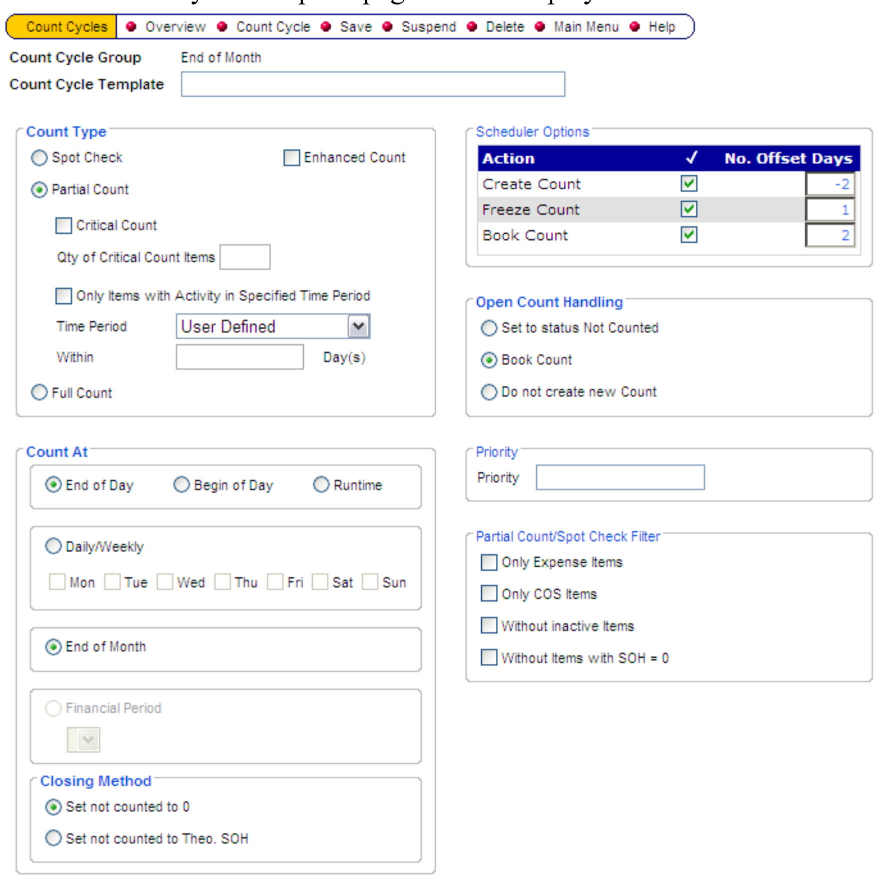
Add a Template to a Count Cycle

By adding a template to a Count Cycle, you are essentially creating a template to govern the behavior of that Count Cycle. To add a template:

1. Select/Create a Count Cycle
2. Click the Add Template key

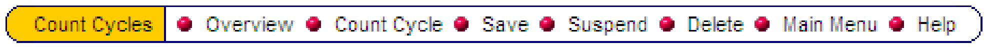


3. The Count Cycle Template page will be displayed:



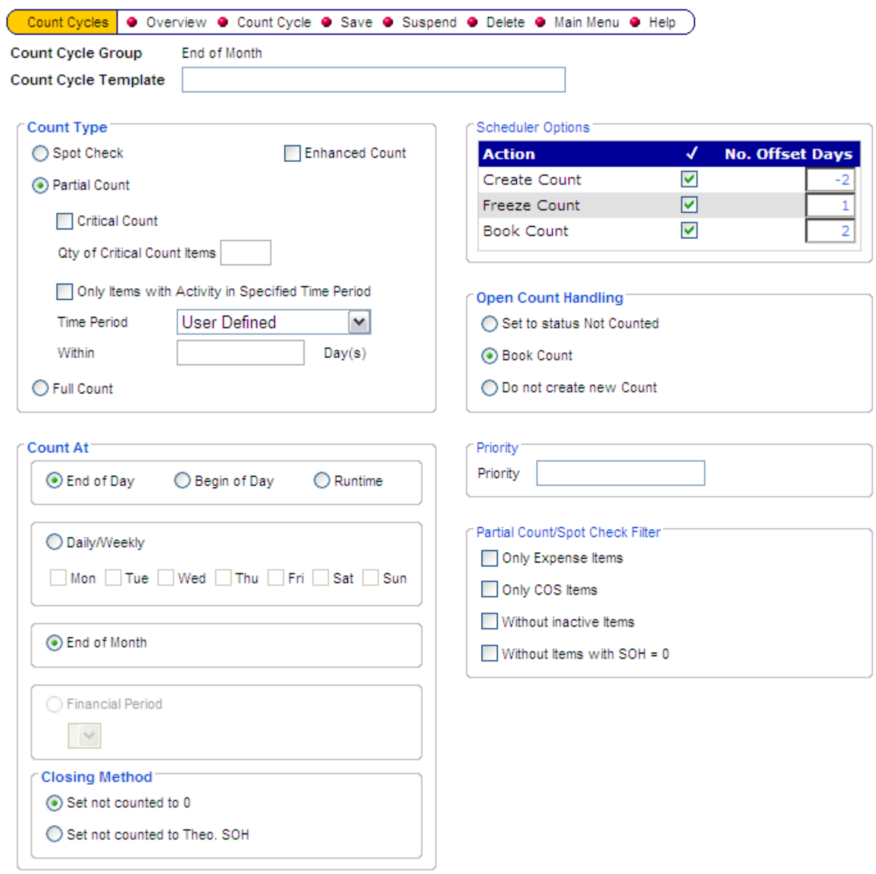
The following describes the Count Cycle Template page features.

Top Menu Bar



Menu Item	Description
Overview	Returns you to the Overview page
Count Cycle	Returns you to the Count Cycle Overview window
Save	Saves the Count Cycle
Suspend	Suspends the Count Cycle so that you may return to it at a later time
Delete	Deletes the Count Cycle
Main Menu	Return to the Main myinventory Menu
Help	Launch the Help file

Additional Screen Elements



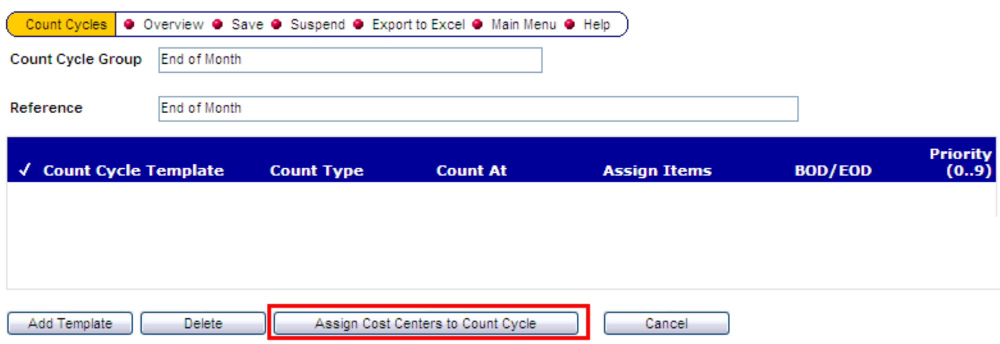
Screen Elements	Description
Count Cycle Group	Displays the name of the Count Cycle Group
Count Cycle Template	Enter a name for the Count Cycle Template
Count Type • Spot Check ◆ Enhanced Count • Partial Count ◆ Critical Count ◆ Qty of Critical Count Items ◆ Only Items with Activity in Specified Time Period ◆ Time Period ◆ Within... Days • Full Count	Specify what type of Count Type you would like to use: • Spot Check – usually performed mid-day with a minimal amount of Items ◆ Enhanced Count - Enabling this option will update the Stock on Hand of the Items included in the Inventory when it is booked • Partial Count – Items counted weekly (ex. bread on Tuesday, meat on Friday, etc) ◆ Critical Count - Enable this to count only Items which had large variances during the last Inventory Count ◆ Qty of Critical Count Items - Enter how many Items should be included in a Critical Count ◆ Only Items with Activity in Specified Time Period - Enable to count only Item which had transaction activity within a specified Time Period ◆ Time Period - Choose User Defined, Current Month, or Last Month transaction activity ◆ Within... Days - If User Defined Time Period was selected, enter the amount of days of transaction activity for Items to be included in Count • Full Count – every Item in the location is included in this Count. Booking a Full Count will close the Financial Period and will prevent any documents from being booked on dates prior to the Inventory Count.
Count At	Determine when you would like the Count to commence

Screen Elements	Description
Daily/Weekly	Specify the day(s) of the week you would like the Inventory Count Cycle(s) to occur
End of Month	Enable this option if you would like the Inventory Count Cycle to occur at the end of the month
Financial Period	Financial Periods are synced from mymicros.net; if you would like your Inventory Count to be performed with respect to your Financial Period, enable this option and pick a Financial Period from the drop down
Closing Method • Set not counted to 0 • Set not counted to Theo. SOH	If an Item is left blank…. • Set not counted to 0 will assume the Item was meant to be left blank and return the Item's SOH to 0 • Set not counted to Theo SOH will assume the blank Item is a mistake and retain the current SOH of the Item
Scheduler Options	If you would like to perform any of the three actions listed and incorporate an offset of days (i.e., days where the count will be created/frozen/booked) then enter the number(s) next to the actions desired
Open Count Handling • Set to status Not Counted • Book Count • Do not create new Count	Determine how you will handle existing Inventory Counts – do you want them to be considered "not counted", do you want them to be booked, or should the system delete the existing count before the new count is created?

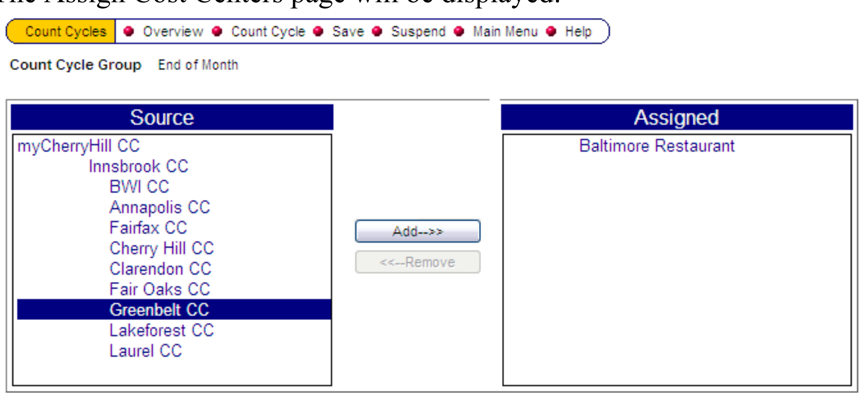
Screen Elements	Description
Priority	If two Count Cycles are valid for the same day, (e.g. Daily Count falls at the End of the Month) the system with the highest priority will be used. (0 is the lowest)
Partial Count/Spot Check Filter	Assigns Filters to the Count Cycle template
• Only Expense Items	• Only Expense Items will include only Items in the Expense category
• Only COS Items	• Only COS Items will include only Items in the COS category
• Without inactive Items	• Without inactive Items will not include any inactive Items
• Without Items with SOH = 0	• Without Items with SOH = 0 will not include any Items with no SOH

Assign a Cost Center/Stores to the Count Cycle

1. Select/Create a Cycle Count
2. Click the Assign Cost Centers to Count Cycle key



The Assign Cost Centers page will be displayed:



3. Select the Cost Centers and Click Assign
4. When you have finished assigning the Count Cycle to the necessary Cost Centers, click Save (or Suspend)

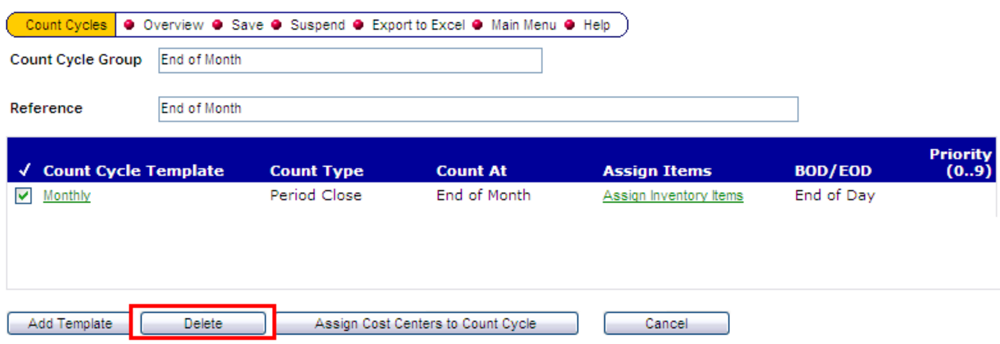
The following describes the Assign a Cost Centers to Count Cycle page features.

Top Menu Bar

Menu Item	Description
Overview	Returns you to the Overview page
Count Cycle	Returns you to the Count Cycle Overview page
Save	Saves the assignment of Cost Centers configurations
Suspend	Suspends the assignment of Cost Centers configurations so that you may return to it later
Main Menu	Return to the Main myinventory Menu
Help	Launch the Help file

Delete a Count Cycle Template

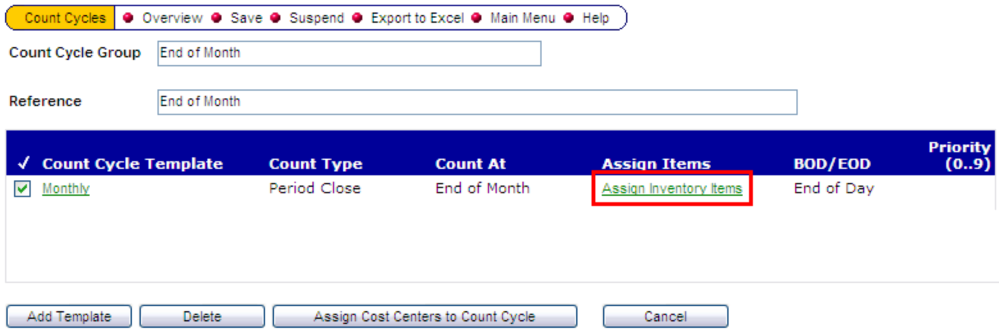
1. Select the Count Cycle name from the Count Cycle Detail window
2. Select the template you wish to delete and click the Delete key at the bottom of the page



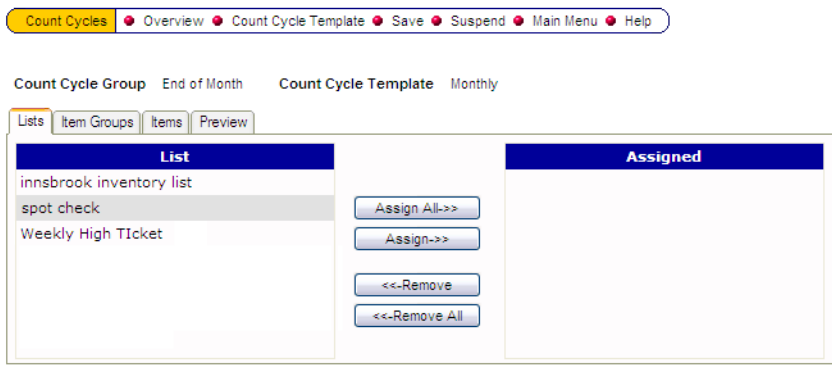
3. Click OK from the Delete Confirmation dialog box

Add Inventory Items

1. From an existing Count Cycle, click the Assign Inventory Items link:

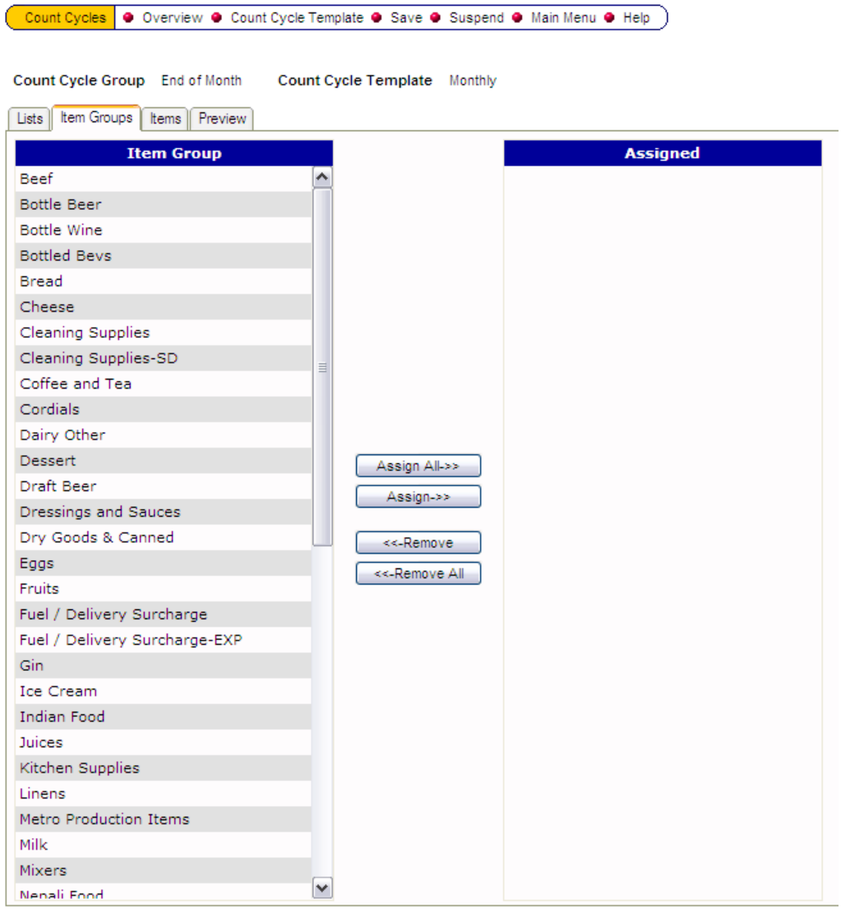


2. There are three ways to assign Inventory Items to a Count Cycle template: by List, by Item Group, and by Item:



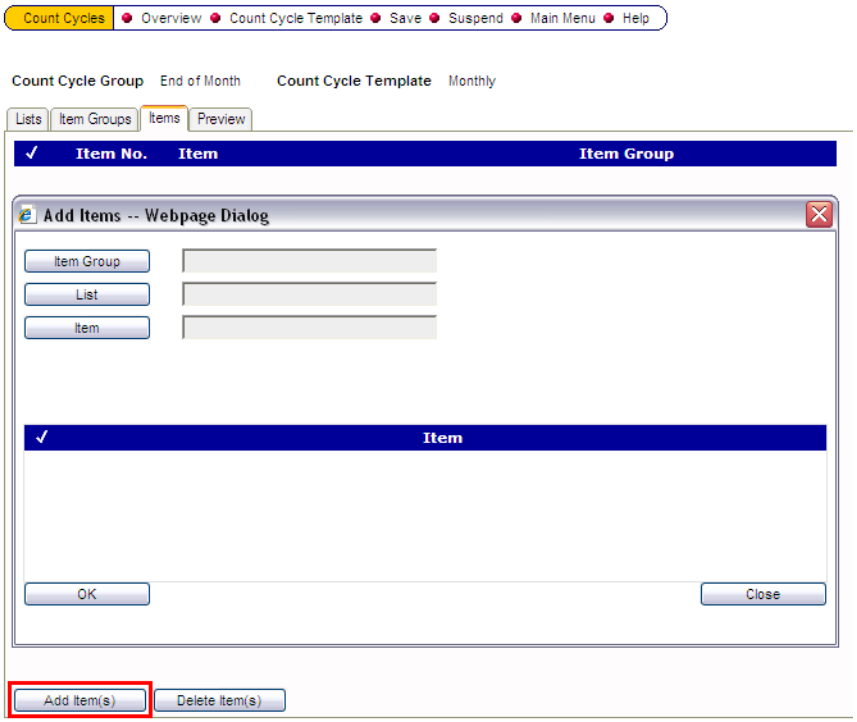
3. To assign a List to the template, highlight the List and select Assign
4. Click Save (or Suspend)

5. To assign an Item Group to a template, highlight the Item Group and Select Assign:



6. Continue adding Groups until all of the necessary Groups are assigned for the Count Cycle template
7. Click Save (or Suspend)

8. To assign Items to a template, select the Add Items key, which will display the Add Items Web page Dialog:



9. Add the necessary Items and select Close
10. Click Save (or Suspend)

Modify an Existing Count Cycle

1. Select the Count Cycle name
2. Add/Delete a template, assign Cost Centers, or assign Inventory Items (instructions above)

Central Ordering

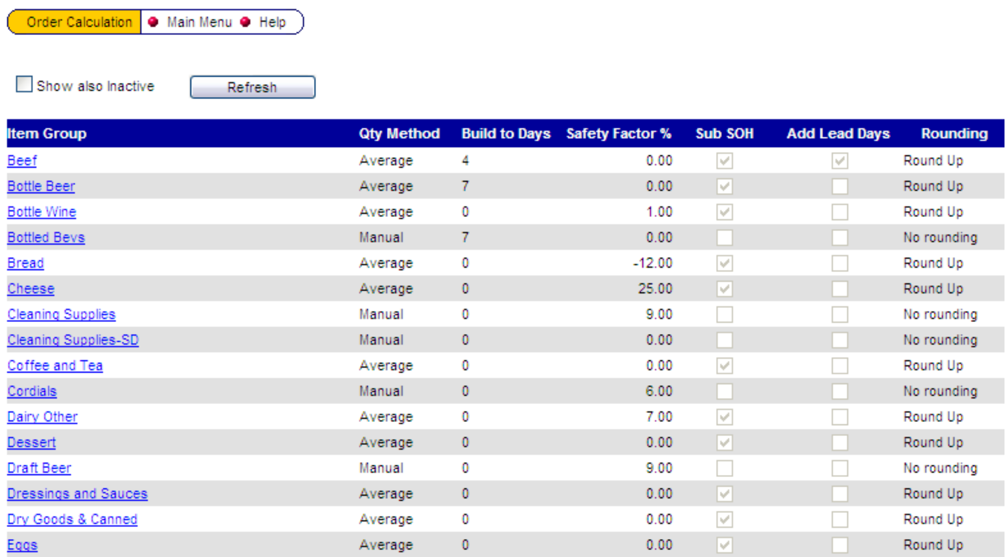
Central Ordering is a module in which all B2B Orders that have been placed will appear with a status that indicates their progress. This allows Users with access to the module the ability to see what stores have placed orders and whether the Vendor has received the order yet. To access the module, you must have the User Right 'Purchase Manager for prepared Orders' enabled.

Order Calculation

Order Calculation is where you can determine how you would like to order specific goods. Order Calculation is extremely important, in that ordering too much of the wrong thing can result in loss of product, whereas ordering too little of another may result in loss of sales. This module can sometimes be referred to as “Order Quantity Calculations”.

The Order Calculation Overview Window

The first page you will see after accessing the Order Cycles module is the Overview window:



Item Group	Qty Method	Build to Days	Safety Factor %	Sub SOH	Add Lead Days	Rounding
Beef	Average	4	0.00	✓	✓	Round Up
Bottle Beer	Average	7	0.00	✓		Round Up
Bottle Wine	Average	0	1.00	✓		Round Up
Bottled Bevs	Manual	7	0.00			No rounding
Bread	Average	0	-12.00	✓		Round Up
Cheese	Average	0	25.00	✓		Round Up
Cleaning Supplies	Manual	0	9.00			No rounding
Cleaning Supplies-SD	Manual	0	0.00			No rounding
Coffee and Tea	Average	0	0.00	✓		Round Up
Cordials	Manual	0	6.00			No rounding
Dairy Other	Average	0	7.00	✓		Round Up
Dessert	Average	0	0.00	✓		Round Up
Draft Beer	Manual	0	9.00			No rounding
Dressings and Sauces	Average	0	0.00	✓		Round Up
Dry Goods & Canned	Average	0	0.00	✓		Round Up
Eggs	Average	0	0.00	✓		Round Up

The following sections describe the Order Calculation screen elements.

Top Menu Bar

Menu Item	Description
Main Menu	Return to the Main myinventory Menu
Help	Launch the Help file

Additional Screen Elements

Screen Element	Description
Show also inactive	Enabling this will display inactive Item Groups in the result set
Refresh	Use this button to view any changes made to the Items Groups. Remember to always click Refresh first when in doubt about the data you are seeing on the window throughout the application.

Modify an Order Calculation

To modify an Order Calculation:

1. Select an Item Group from the Item Group List. A modify dialog box will be displayed below the selected Item Group:

2. Make the necessary adjustments.

   a. Quantity Method – Manual Orders, Average Usage, Net Sales, PAR

   - Manual – Orders will be calculated based on the manual entry of quantities in ordering; selecting this will override the values set in Item Groups
   - Average Usage – Orders are calculated based on suggested forecast values and override any Average Usage values predetermined in Item Groups

- Net Sales – QTY will be calculated based on the Forecasted Sales information transferred from mymicros.net and a factor required to generate $1000 Revenue
- PAR – Orders are calculated based on PAR levels that are set in Manage Store

b. Build to Days – not used by myinventory

c. Safety Factor % – this is the “cushion” of product. This will help to ensure enough product is purchased/ordered

d. Subtract SOH – enable this if you would like the SOH to be subtracted from the total before the order quantity is calculated

e. Add lead days usage – not used by myinventory

f. Rounding – Generally, this will always need to be checked. For example, it would be nearly impossible to order 2.34 cases of something. You could perhaps order 2 cases (rounding down), 3 cases (rounding up) or 2 cases (rounding to the nearest)

Tips & Tricks

If a site is set to use Suggested Ordering and you want the Items to show suggested quantities in the Ordering Module, the Items in the Item Group must be set to either Average Usage, Net Sales, or PAR in this module OR by specific Item.

Therefore, if the majority of the Items in the group are suggested, then mark them as so and override the Item level for those few that are not suggested.

3. Select OK

Your updates will be visible on the Order Calculation Overview window.

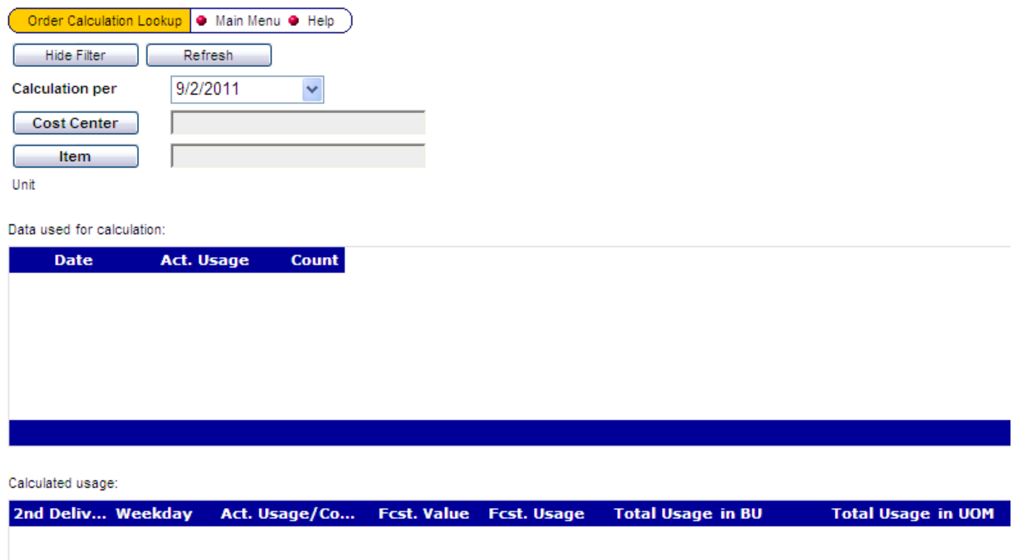
Note *Everything is set up initially but can be overridden at the Item level for Items within a group that do not fit the “norm” for that group.*

Order Calculation Lookup

The Order Calculation Lookup page is where you can view an estimated Order Calculation based on previous sales history averages for a specific Item.

The Order Calculation Lookup Overview Window

The first page you will see after accessing the Order Calculation Lookup module is the Overview window:

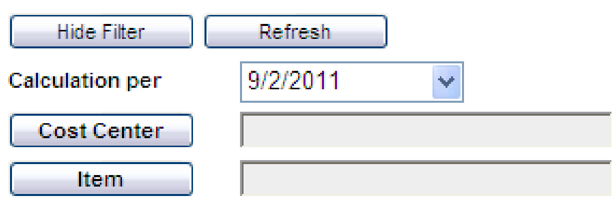


The following sections describe the Order Calculation Lookup screen elements

Top Menu Bar

Menu Item	Description
Main Menu	Return to the Main myinventory Menu
Help	Launch the Help file

Additional Screen Elements

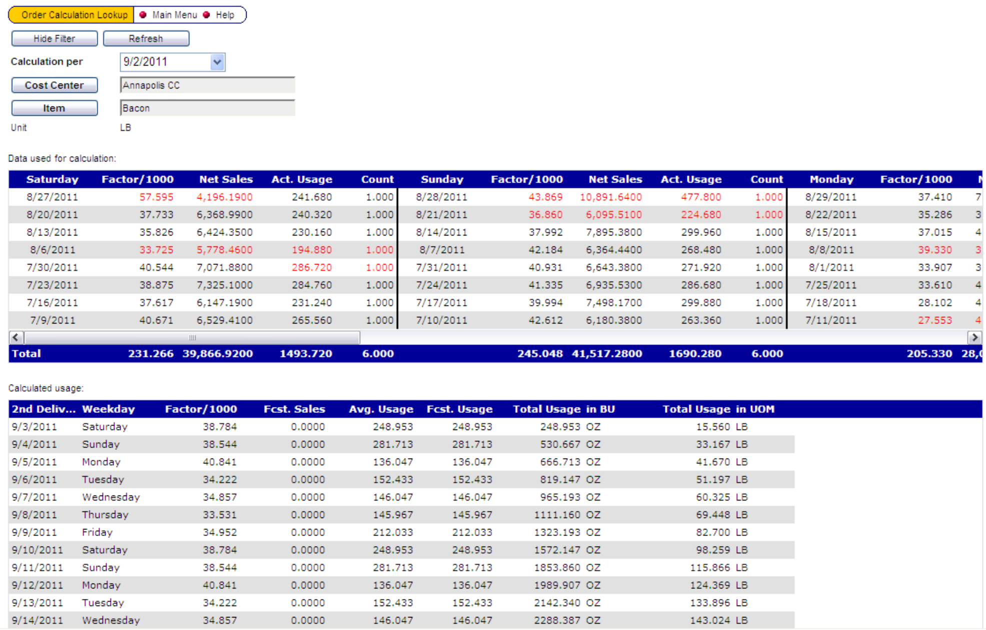


These filters behave as described in the Welcome section. For more information, please refer to the Screen Layout section of the Welcome page.

Lookup the Calculated Order

1. Enter the name of the Cost Center; place your cursor inside the field and press Enter to see a list of all available Cost Centers
2. Select an Item; place your cursor inside the field and press Enter to see a list of all available Items

3. Click Refresh



Saturday	Factor/1000	Net Sales	Act. Usage	Count	Sunday	Factor/1000	Net Sales	Act. Usage	Count	Monday	Factor/1000	M
8/27/2011	57.595	4,196.1900	241.680	1.000	8/28/2011	43.869	10,891.6400	477.800	1.000	8/29/2011	37.410	7
8/20/2011	37.733	6,368.9900	240.320	1.000	8/21/2011	36.860	6,095.5100	224.680	1.000	8/22/2011	35.286	3
8/13/2011	35.826	6,424.3500	230.160	1.000	8/14/2011	37.992	7,895.3800	299.960	1.000	8/15/2011	37.015	4
8/6/2011	33.725	5,778.4600	194.880	1.000	8/7/2011	42.184	6,364.4400	268.480	1.000	8/8/2011	39.330	3
7/30/2011	40.544	7,071.8800	286.720	1.000	7/31/2011	40.931	6,643.3800	271.920	1.000	8/1/2011	33.907	3
7/23/2011	38.875	7,325.1000	284.760	1.000	7/24/2011	41.335	6,935.5300	286.680	1.000	7/25/2011	33.610	4
7/16/2011	37.617	6,147.1900	231.240	1.000	7/17/2011	39.994	7,498.1700	299.880	1.000	7/18/2011	28.102	4
7/9/2011	40.671	6,529.4100	265.560	1.000	7/10/2011	42.612	6,180.3800	263.360	1.000	7/11/2011	27.553	4
Total	231.266	39,866.9200	1493.720	6.000		245.048	41,517.2800	1690.280	6.000		205.330	28,(

2nd Deliv...	Weekday	Factor/1000	Fcst. Sales	Avg. Usage	Fcst. Usage	Total Usage in BU	Total Usage in UOM
9/3/2011	Saturday	38.784	0.0000	248.953	248.953	248.953 OZ	15.560 LB
9/4/2011	Sunday	38.544	0.0000	281.713	281.713	530.667 OZ	33.167 LB
9/5/2011	Monday	40.841	0.0000	136.047	136.047	666.713 OZ	41.670 LB
9/6/2011	Tuesday	34.222	0.0000	152.433	152.433	819.147 OZ	51.197 LB
9/7/2011	Wednesday	34.857	0.0000	146.047	146.047	965.193 OZ	60.325 LB
9/8/2011	Thursday	33.531	0.0000	145.967	145.967	1111.160 OZ	69.448 LB
9/9/2011	Friday	34.952	0.0000	212.033	212.033	1323.193 OZ	82.700 LB
9/10/2011	Saturday	38.784	0.0000	248.953	248.953	1572.147 OZ	98.259 LB
9/11/2011	Sunday	38.544	0.0000	281.713	281.713	1853.860 OZ	115.866 LB
9/12/2011	Monday	40.841	0.0000	136.047	136.047	1989.907 OZ	124.369 LB
9/13/2011	Tuesday	34.222	0.0000	152.433	152.433	2142.340 OZ	133.896 LB
9/14/2011	Wednesday	34.857	0.0000	146.047	146.047	2288.387 OZ	143.024 LB

Note *Average totals are calculated by pulling 8 week averages and then dropping the highest and lowest weeks for all customers.*

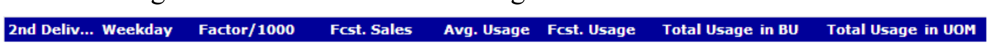
• Black denotes averages with both the highest and lowest week totals included in the average calculated totals.

• Red denotes averages with highest and lowest week totals dropped off from the average calculated totals.

Calculated Usage

The Calculated Usage field at the bottom of the screen is the forecasted estimated usage for the next two weeks in the Cost Center. If the Forecasting module is used by the organization and Order Calculation by Net Sales is configured, this section will include data based on sales. If not, the system will calculate estimated usage based on the previous 8 week's usage.

The following describes the Calculated Usage Columns:



2nd Deliv...	Weekday	Factor/1000	Fcst. Sales	Avg. Usage	Fcst. Usage	Total Usage in BU	Total Usage in UOM

Menu Item	Description
2nd Delivery Date	The date of the estimate
Weekday	Displays the day of the week for the estimate
Factor/1000	Displays how much of the Item needs to be sold to create $1,000 in revenue

Menu Item	Description
Fcst. Sales	Displays the Forecasted sales for the Item
Ave. Usage	Displays the estimated average usage for the Item
Fcst. Usage	Displays the forecasted usage for the Item
Total Usage in BU	Displays the estimated total usage for the Item in its Base Unit. This number accumulates each day to make Ordering easier by eliminating the need to add each day together.
Total Usage in UOM	Displays the estimated total usage for the Item in its Store Unit. This number accumulates each day to make Ordering easier by eliminating the need to add each day together.

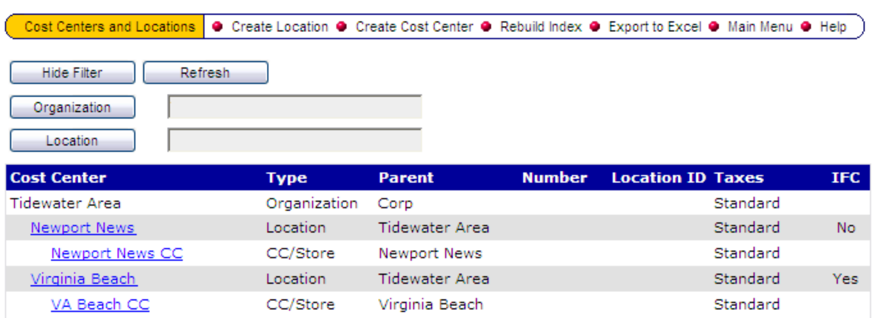
Cost Centers and Locations

The Cost Centers and Locations module is where you can create new Cost Centers and link them to Locations. Keep in mind that, although this module is available, when new CCs/Locations are created that do not correspond with a MICROS Sales Order, those CCs/Locations will never show any totals and they will not be part of the interface.

It is suggested that this module be used only to view Menu Item hierarchy structure. All additions should be carried out by MICROS.

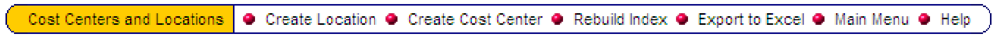
The Cost Centers and Locations Overview Window

The first page you will see after accessing the Cost Centers and Locations module is the Overview window:



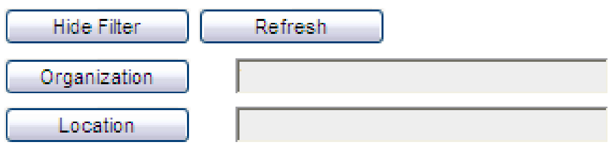
The following sections describe the Cost Center and Location screen elements.

Top Menu Bar



Menu Item	Description
Create Location	All Locations should have been synced from mymicros.net. If added manually, the sync of sales and definitions will not work.
Create Cost Center/ Store	Allows you to add a Cost Center or Store to any Location within the hierarchy
Rebuild Index	If a new Location, Cost Center, or Store is added, sometimes you have to rebuild the index to get the hierarchical indentations to be correct
Main Menu	Return to the Main myinventory Menu
Help	Launch the Help file

Additional Screen Elements



These filters behave as described in the Welcome section. For more information, please refer to the Screen Layout section of the Welcome Page.

Information Bar

Menu Item	Description
Cost Center/Store	Displays the names of the Cost Centers and Stores for this Organization
Type	Indicates if an entry is an Organization, Location, or Cost Center/Store
Parent	Displays the name of the Tier that is one level up
Number	The reference number stored in the database for a Cost Center. This number is unique and cannot be duplicated
Location ID	This number syncs over from mymicros.net. This field is unique and cannot be duplicated

Menu Item	Description
Taxes	Displays the Tax associated with this record
IFC	Displays the status of the Interface to mymicros.net for the specific Location

Cost Center Areas

The Cost Center Areas page is where transfer visibility can be set. Essentially, this is where the System Administrator can determine what Cost Centers will be allowed to Transfer and Request Items from other Cost Centers.

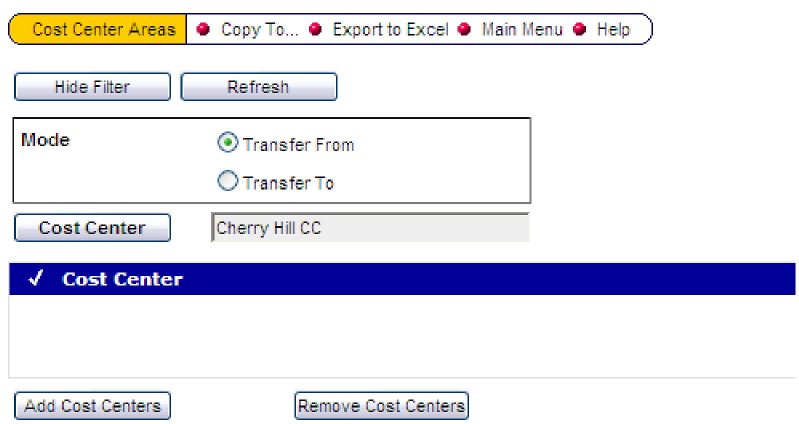
For example, it may be possible for Cost Center A to only be able to Transfer Items to Cost Center B, whereas Cost Center B can Transfer **and** Request Items from Cost Center C.

Tips & Tricks

Do not turn on the privileges to User Cost Center areas until Cost Centers are set up. If this right is turned on prematurely, sites will not be able to perform any Transfers.

The Cost Center Areas Overview Window

The first page you will see when accessing the Cost Center Areas module is the Overview window:

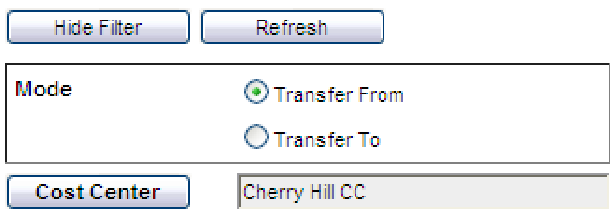


The following sections describe the Cost Center Areas screen elements.

Top Menu Bar

Menu Item	Description
Copy To…	Copy the Transfer From/To settings to another Cost Center; this feature is only available for one mode at a time
Export to Excel	Opens the currently displayed information in an Excel spreadsheet
Main Menu	Return to the Main myinventory Menu
Help	Launch the Help file

Additional Screen Elements



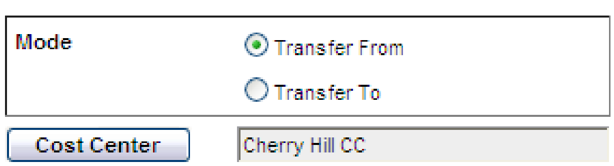
These filters behave as described in the Welcome section. For more information, please refer to the Screen Layout section of the Welcome page.

Screen Element	Description
Mode	Determines which setting you wish to modify, Transfer From or Transfer To

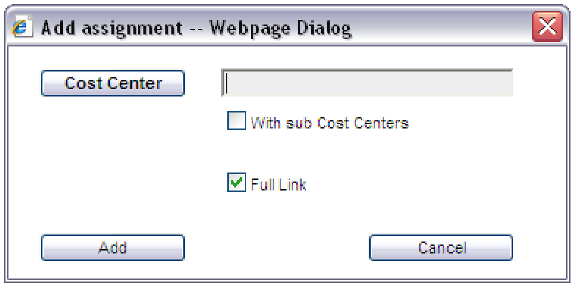
Add an Issue Request or Transfer to a Cost Center

The first thing you must do before assigning a Transfer From/To capability to a Cost Center is to determine which Cost Center will be modified.

1. Select the Cost Center that will have a Transfer From/To status applied to it – we have selected Cherry Hill CC.
2. Determine if you will be Transferring From or Transferring To and enable the corresponding button – we will be adding a store that Cherry Hill CC will be able to accept a Transfer From



3. From the Cost Center Overview window, click Add Cost Centers/Stores; the Add assignment window will appear



4. Select a Cost Center/Store from the Cost Center/Store field; place your cursor inside the field to see a list of all available Cost Centers.

   With Sub Cost Center - If this feature is enabled, all Cost Centers below the Cost Center selected will be eligible for Transfer From/To from the default store.

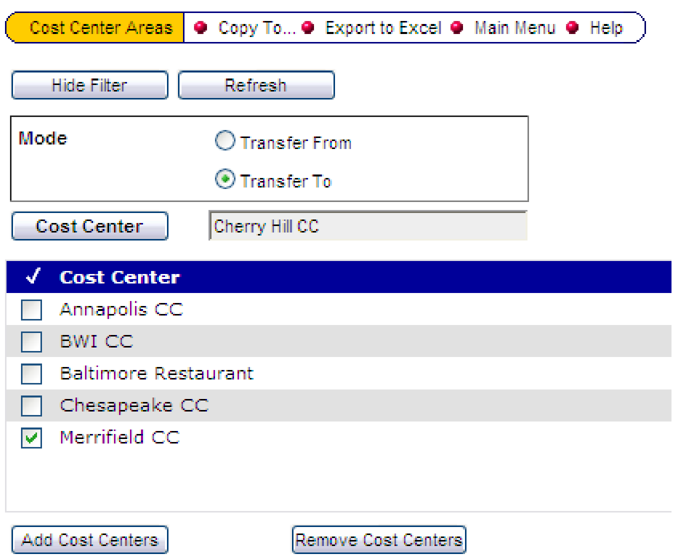
   Full Link – enable this function if you would like both Transfer From and Transfer To modes to be affected by the modification.

5. Select Add

Delete a Cost Center/Store

To delete a Transfer From/To capability from a Cost Center:

1. Cherry Hill CC has the ability to Transfer To: Annapolis, BWI CC, Baltimore Restaurant, Chesapeake CC, Merrifield CC.



We are removing the ability to Transfer To Merrifield CC

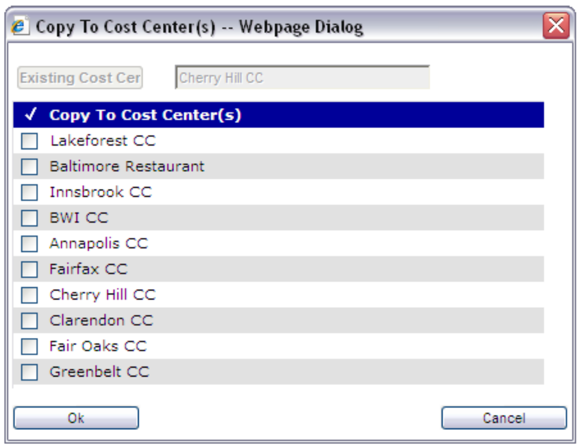
2. Be sure you are in Transfer To mode
3. Select Merrifield CC and then click the Remove Cost Center key
4. Select OK from the confirmation dialog box

The Cost Center will be deleted from the Cost Center list.

Copy Cost Center Info to Another

By clicking the Copy To… button on the Top Menu Bar, you can copy the Transfer/Request settings from one Cost Center to another Cost Center; this feature is only available for one mode at a time.

1. Select Copy To… from the Top Menu Bar
2. Select the Cost Centers/Stores from the Copy To Cost Center(s) dialog box that you wish to have Existing Store's Transfer From/To settings applied to.



3. Select OK

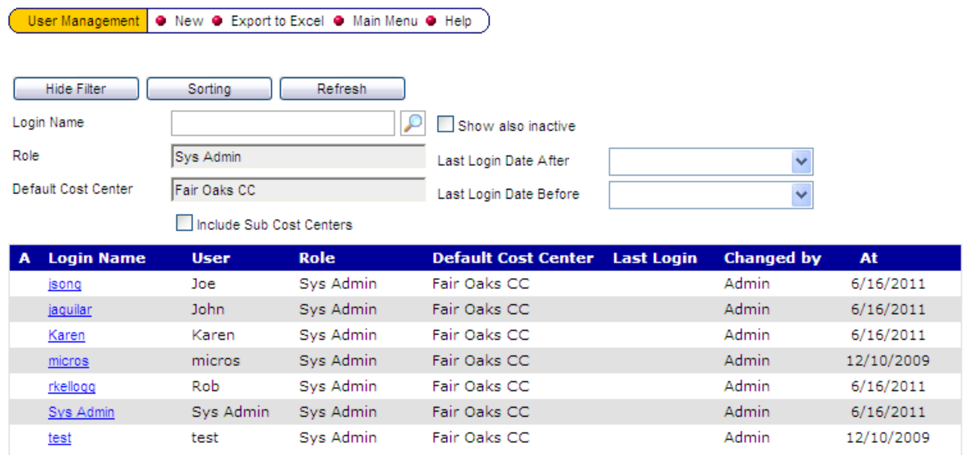
Transfer From/To settings will be applied to those selected Cost Centers.

User Management

User Rights are administered in the User Management module.

User Management Overview Window

The first page you see when accessing the User Management module is the User Management Overview window:



From this window, you can create a spreadsheet with all User information contained in it or modify existing Users.

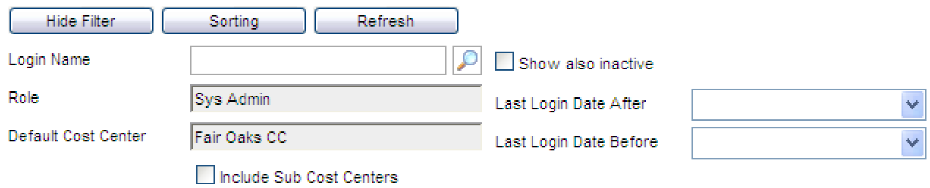
The following section describes the elements contained in the User Management Overview window.

Top Menu Bar

Menu Item	Description
New	Creates a new User
Export to Excel	Opens the current information into an Excel spreadsheet
Main Menu	Return to the Main myinventory Menu
Help	Launch the Help file

Note — *Creating a User in myinventory **should not** be done!! All Users should be created in mymicros.net and synced to myinventory. Otherwise, "new" Users (those created in myinventory) will not be able to log into myinventory. To access myinventory, the User must have access to mymicros.net.*

Additional Screen Elements



These filters behave as described in the Welcome section. For more information, please refer to the Screen Layout section of the Welcome page.

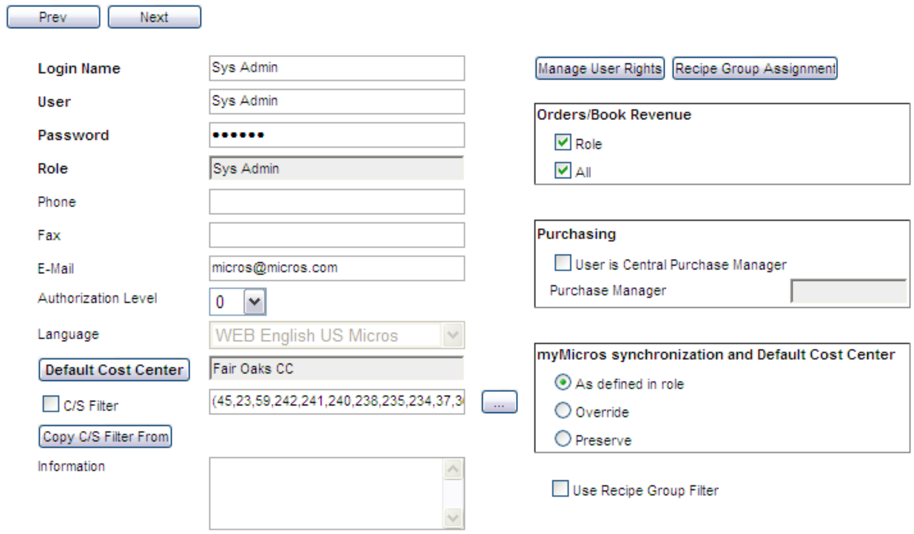
User Management Detail Window

From the User Management Detail window, you can modify an existing User profile. The following section describes the elements contained in the User Management Detail window.

Top Menu Bar

Menu Item	Description
Overview	Go to the subject area overview
New	Create a new User
Save	Saves updates to a recently modified User
Delete	Deletes a User
Main Menu	Return to the Main myinventory Menu
Help	Launch the Help file

Additional Screen Elements



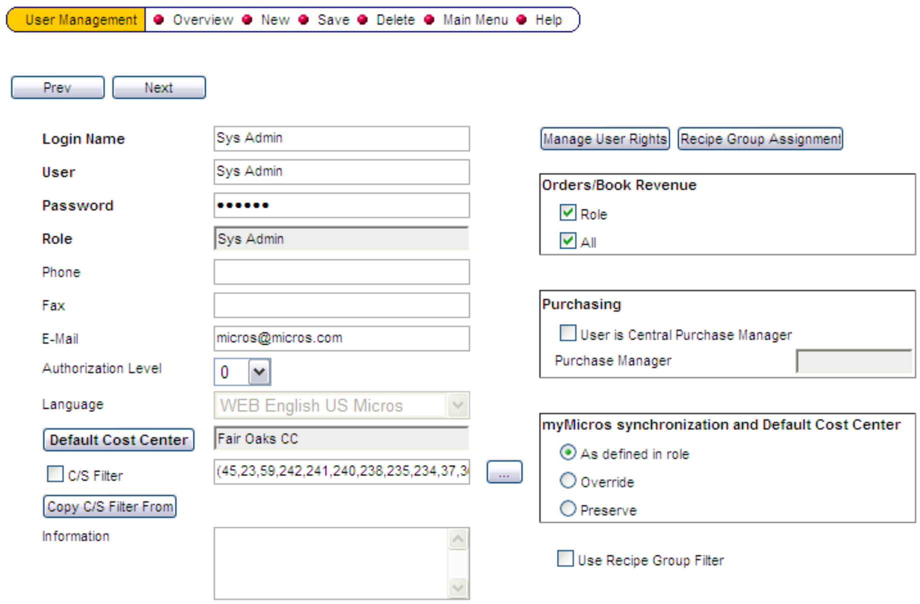
Screen Element	Description
Previous	View the previous entry in the User Management List
Next	View the next entry in the User Management List
Role	Displays the User’s Role
Phone	Displays User’s phone number, if entered
Fax	Displays User’s fax number, if entered
E-Mail	Displays User’s E-Mail address
Authorization Level	Displays the User’s authorization level in regard to Ordering Items. If an Item has a level higher than the User’s, the User may not Order it.
Language	Displays the Language for the User
Default Cost Center	This is the default Cost Center for this User. When accessing certain modules, this Cost Center will be pre-populated in the Cost Center field

Screen Element	Description
C/S Filter	Enable this to use the Cost Center/Store filter. The field to the right of this option will display the Cost Centers/Stores currently in the User's filter. The User will not have access to Cost Centers/Stores not included here. To make adjustments to the filter, click the button to the right of the field. A window will be displayed and Cost Centers and Stores may be added or deleted from the User's filter.
Copy C/S Filter From	Allows you to copy a User's C/S Filter to another User
Information	Enter any information pertinent to the User in this field
Manage User Rights	Displays the User Rights Assignment screen
Recipe Group Assignment	Displays the Recipe Group Assignment screen
User is Central Purchase Manager	Can approve/book Orders
Purchase Manager	Select the User's Purchasing Manager
mymicros.net synchronization and Default Cost Center	As Defined in Role uses the setting from Role Management Override will retain the default Cost Center synced from mymicros.net for this User Preserve will ignore the default Cost Center synced from mymicros.net and use the information indicated in this module
Use Recipe Group Filter	Enable this to use the Recipe Group filter with this User

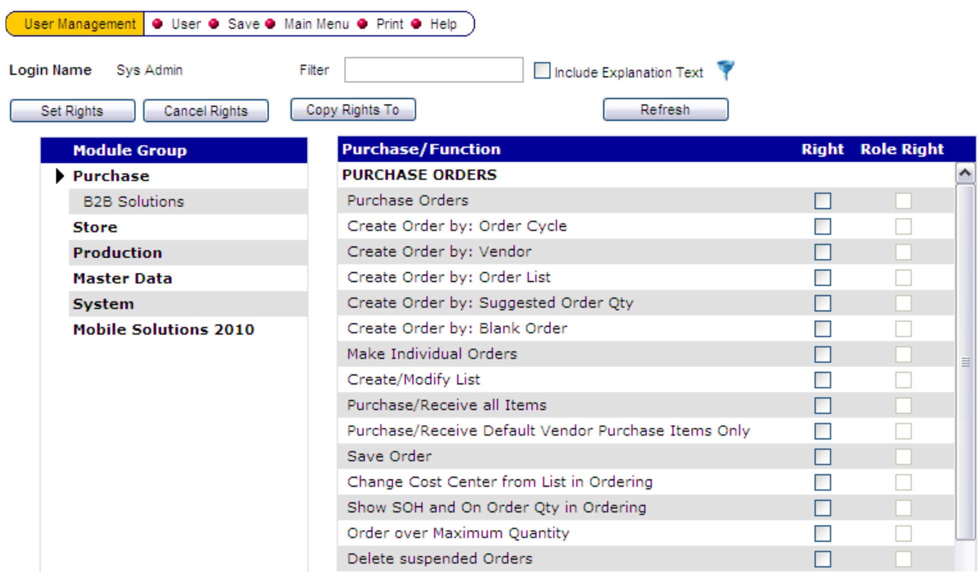
Modify and Assign Rights to a User

From the User Management Detail window, you can modify a User:

1. Select a User from the list; the screen will refresh and the User Management Detail window will be displayed:



2. Modify the User as necessary
3. Select Manage User Rights; the Manage User Rights page will be displayed:



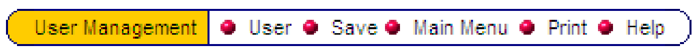
4. Select a Module Group from the left side box; options will appear in the box on the right – these options will vary depending on the selection. Select the User Rights to assign by clicking the box next to the Right description
5. When you have finished selecting Rights, click Save

The Manage User Rights Detail Page

From the User Management Detail window, you can assign User Rights to the selected User. The following section describes the elements contained in the User Management Detail window.

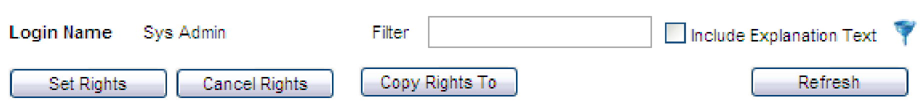
> **Tips & Tricks**
>
> *Set basic Role Rights prior to setting User rights. Then, add rights as needed to individual Users. This will not only be more manageable and save time, but it will ensure new Users have the correct rights from the get-go.*
>
> *If set per User, when a new User logs in, they may see nothing unless the System Administrator has set up the new User's individual User Rights already.*

Top Menu Bar



Menu Item	Description
User	Returns you to the User Management Overview Window
Save	Saves the User Management configurations
Main Menu	Return to the Main myinventory Menu
Print	Sends a list of the User's Rights to your printer
Help	Launch the Help file

Additional Screen Elements



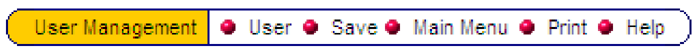
Screen Element	Description
Login Name	Displays the login name for the User
Set Rights	This will enable all of the Rights for the module. For modules with many Rights, this becomes extremely helpful.
Cancel Rights	This will deselect any Rights already selected for the module. It will not erase Rights across modules.

Screen Element	Description
Copy Rights To…	This will copy the Rights assigned from one User to another. Because assigning Rights can potentially be an arduous task, this feature provides a quick and easy method of applying Rights already specified.
Refresh	This button will refresh the information on the page

The Recipe Group Assignment Window

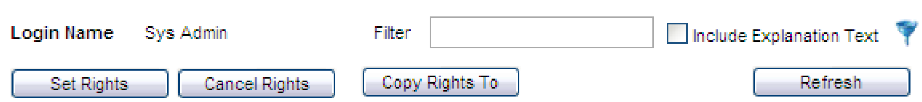
From the User Management Detail page, you may assign Recipe Groups to the User. The following section describes the elements contained in the Recipe Group Assignment window.

Top Menu Bar



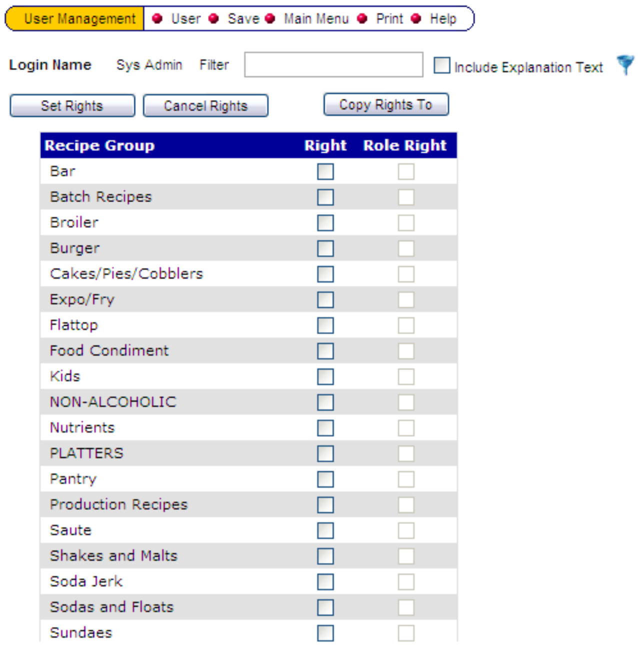
Menu Item	Description
User	Returns you to the User Management Detail Window
Save	Saves the User Management configurations
Main Menu	Return to the Main myinventory Menu
Print	Sends a list of the User's Recipe Group Assignment to your printer
Help	Launch the Help file

Additional Screen Elements



Screen Element	Description
Login Name	Displays the login name for the User
Set Rights	This will enable the User to select all of the Recipe Groups
Cancel Rights	This will deselect any Recipe Groups already selected
Copy Rights To…	This will copy the Recipe Groups Assignment from one User to another

1. To assign Recipe Groups, select Recipe Group Assignment from the User Management Detail screen; the following page will be displayed.



2. Select the Recipe Groups to assign to the selected User by clicking the box next to the Right description
3. When you have finished selecting Recipe Groups, click Save from the Top Menu Bar

Delete a User

You may not “delete” a User. You may only make a User inactive.

If you accidentally set a User’s status to inactive, you may reactivate a User by manipulating the User’s Rights and saving. This will cause the system to realize an update is taking place and the User is still needed.

To delete, please refer to the Delete Items section of this document.

Note *Making a User inactive in myinventory **does not** make the User inactive in mymicros.net.*

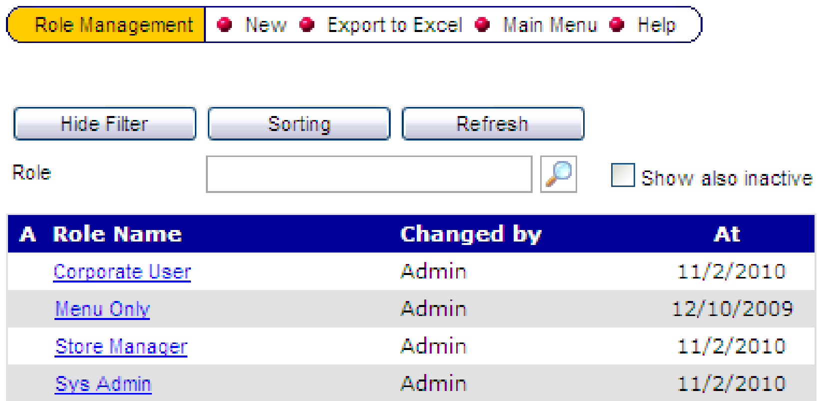
However, making a User inactive in mymicros.net will make a User in myinventory inactive.

Role Management

The Role Management module is where rights and privileges on a Role level may be created and maintained.

Role Management Overview Window

The first page you see when accessing the Role Management module is the Role Management Overview window:



From this window, you can create a spreadsheet with all Role information contained in it or modify existing Roles.

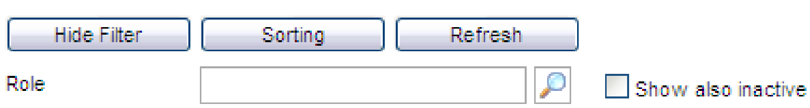
The following section describes the elements contained in the Role Management Overview window.

Top Menu Bar

Menu Item	Description
New	Create a new Role
Export to Excel	Opens the current information into an Excel spreadsheet
Main Menu	Return to the Main Menu
Help	Launch the Help file

Note *Creating Roles in myinventory **should not** be done!! All Roles should be created via mymicros.net syncs. Roles created in myinventory will not be available to any Users who access the system through mymicros.net.*

Additional Screen Elements



These filters behave as described in the Welcome section. For more information, please refer to the Screen Layout section of the Welcome page.

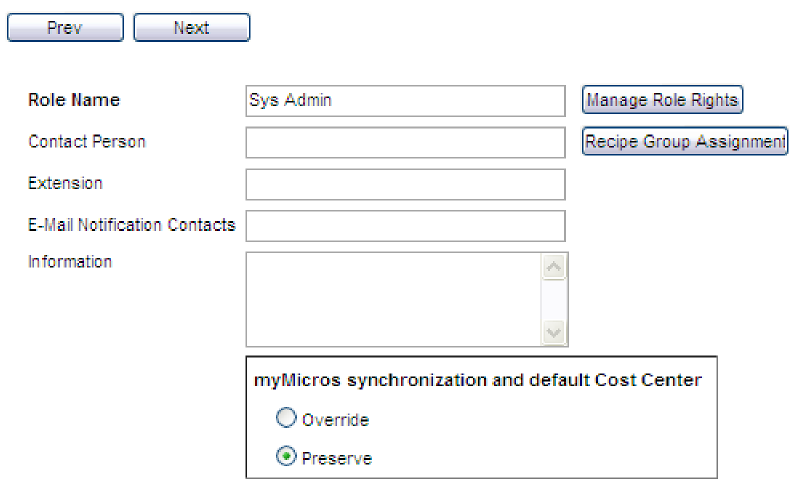
Role Management Detail Window

From the Role Management Detail window, you can modify existing Roles. The following section describes the elements contained in the Role Management Detail window.

Top Menu Bar

Menu Item	Description
Overview	Go to the subject area overview
New	Creates a new Role
Save	Saves updates to a recently modified Role
Delete	Deletes a Roles
Main Menu	Return to the Main myinventory Menu
Help	Launch the Help file

Additional Screen Elements



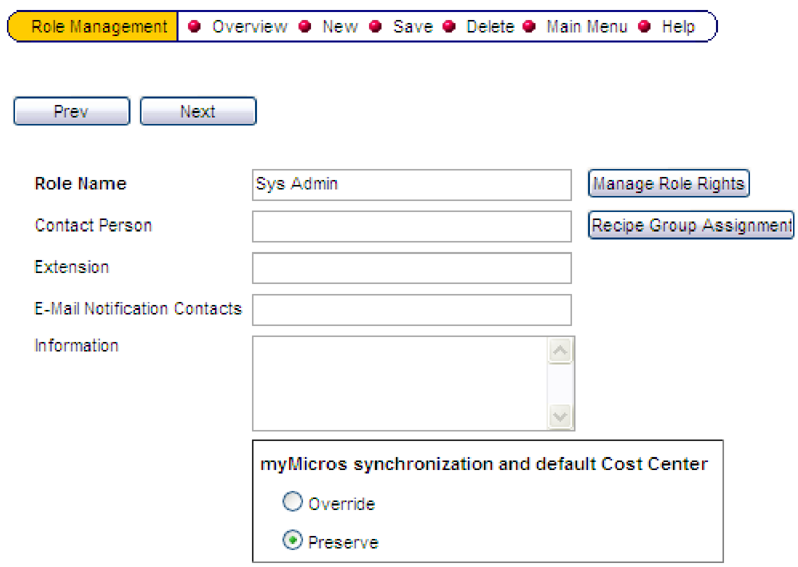
Screen Element	Description
Previous	View the previous entry in the Role Management List
Next	View the next entry in the Role Management List
Manage Role Rights	Displays the Role Rights Assignment screen

Screen Element	Description
Recipe Group Assignment	Displays the Recipe Group Assignment screen
mymicros.net synchronization and default Cost Center	Override will ignore the default Cost Center synced from mymicros.net and use the information indicated in this module Preserve will retain the default Cost Center synced from mymicros.net for this Role

Modify and Assign Rights to a Role

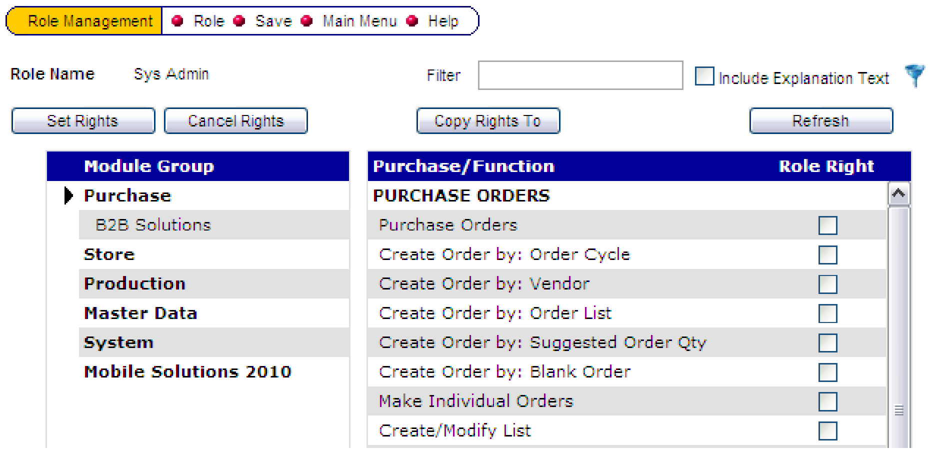
From the Role Management Overview window, you can modify a Role:

1. Select a Role from the list; the Role Management Detail window will be displayed:



2. Modify the Role as necessary

3. Select Manage Role Rights; the Manage Role Rights page will be displayed:



4. Select a Module Group from the left side box; options will appear in the box on the right – these options will vary depending on the selection made from Module Group
5. Select the Role Rights to assign to the selected Role by clicking the check box next to the Right
6. When you have finished selecting Role Rights, click Save

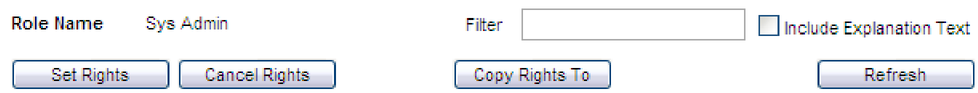
The Manage Role Rights Detail Page

From the Role Management Detail window, you can assign Rights to the selected Role. The following section describes the elements contained in the Role Management Detail window.

Top Menu Bar

Menu Item	Description
Role	Returns you to the Role Management Overview Window
Save	Saves changes made to Rights assignment
Main Menu	Return to the Main myinventory Menu
Help	Launch the Help file

Additional Screen Elements



Screen Element	Description
Role Name	Displays the Role name
Set Rights	This will enable all of the Rights for the module. For modules with many Rights, this becomes extremely helpful.
Cancel Rights	This will deselect any Rights already selected for the module. It will not erase Rights across modules.
Copy Rights To…	This will copy the Rights assigned from one Role to another. Because assigning Rights can potentially be an arduous task, this feature provides a quick and easy method of applying Rights already created.
Refresh	This will refresh the information on the page

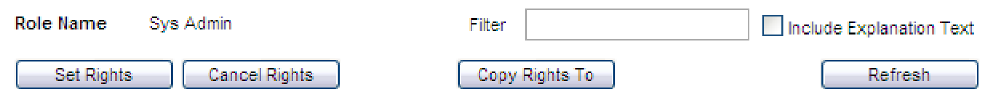
The Recipe Group Assignment Page

From the Role Management Detail page, you may assign Recipe Groups to the Role. The following section describes the elements contained in the Recipe Group Assignment window.

Top Menu Bar

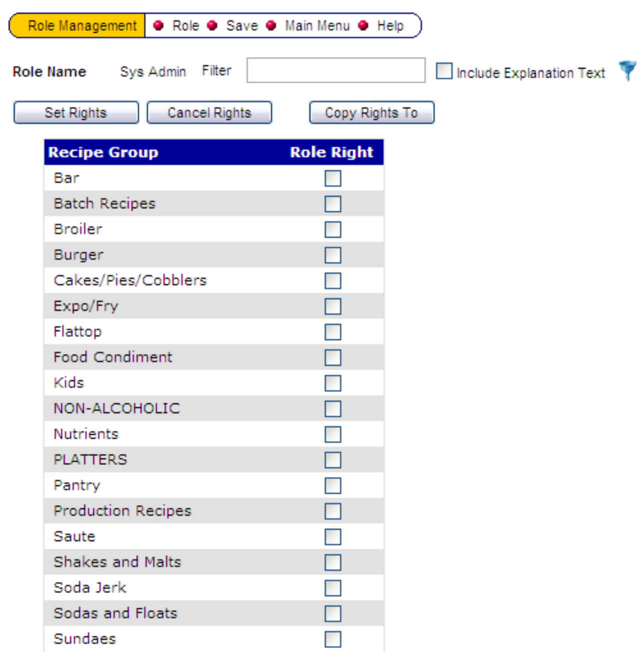
Menu Item	Description
Role	Returns you to the Role Management Detail Window
Save	Saves the Role Management configuration
Main Menu	Return to the Main myinventory Menu
Help	Launch the Help file

Additional Screen Elements



Screen Element	Description
Login Name	Displays the name of the Role
Set Rights	This will select all of the Recipe Groups and assign them to the Role
Cancel Rights	This will deselect any Recipe Groups already selected
Copy Rights To…	This will copy the Recipe Groups Assignment from one Role to another

1. To assign Recipe Groups, select the Recipe Group Assignment key from the Role Management Detail screen; the following page will be displayed:



2. Select the Recipe Groups to assign to the selected Role by clicking the box next to the Right description
3. When you have finished selecting Recipe Groups, click Save from the Top Menu Bar

Delete a Role You may not “delete” a Role. You may only make a Role inactive.

If you accidentally set a Role's status to inactive, you may reactivate a Role by manipulating the Role's Rights and saving. This will cause the system to realize an update is taking place and the Role is still needed.

To delete, please refer to the Delete Items section of this document.

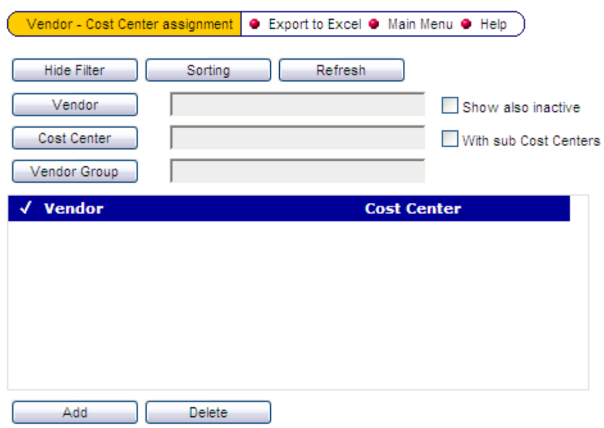
Note	*Making a Role inactive in myinventory **does not** make the Role inactive in mymicros.net.* *However, making a Role inactive in mymicros.net will make the Role inactive in myinventory.*

Vendor - Cost Center

The Vendor - Cost Center module is where Vendor visibility can be assigned to Cost Centers. For large organizations with many Vendors, this provides a way to minimize the amount of data Cost Centers are able to access.

Vendor - Cost Center Overview Window

The first page you see when accessing the Vendor - Cost Center module is the Vendor - Cost Center Overview window:



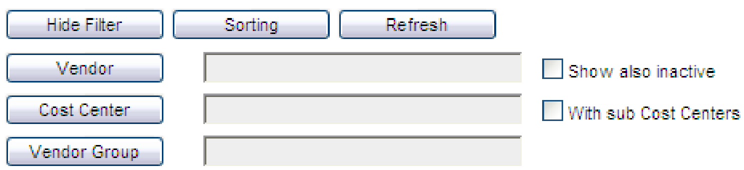
From this window, you can assign Vendors to Cost Centers and delete assignments.

The following section describes the elements contained in the Vendor - Cost Center Overview window.

Top Menu Bar

Menu Item	Description
Export to Excel	Opens the current information into an Excel spreadsheet
Main Menu	Return to the Main myinventory Menu
Help	Launch the Help file

Additional Screen Elements

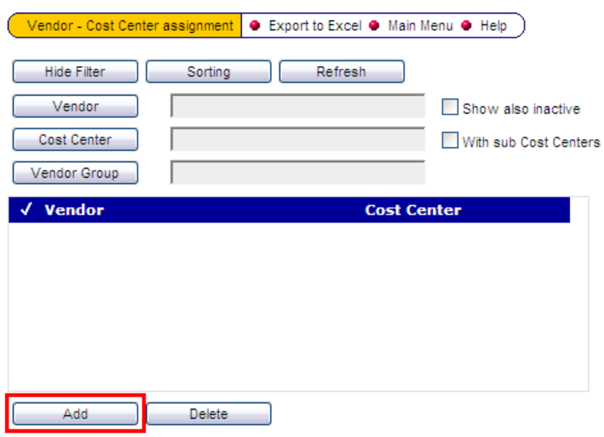


These filters behave as described in the Welcome section. For more information, please refer to the Screen Layout section of the Welcome page.

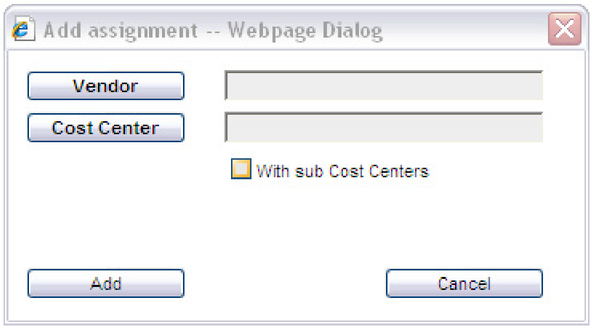
Vendor - Cost Center Assignment

To assign a Vendor to a Cost Center:

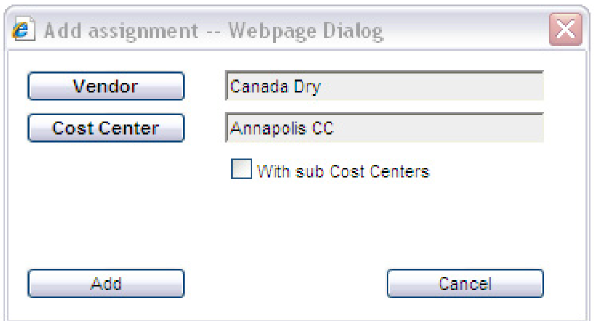
1. Select Add from the Vendor - Cost Center Overview window:



2. A pop up window will be displayed in which you can choose a Vendor and a Cost Center to assign it to:



3. Once a Vendor and Cost Center are chosen, select Add:



Only Cost Centers that are assigned to the Vendor will be able to view it in myinventory

Appendix: User Rights

Overview

The following is an overview of User Rights. Privileged Users can access the User Rights area by navigating to Administration | Maintenance | User Management You will need to select the User (or Role) and select Manage Rights to begin assigning Rights as necessary.

User Rights are categorized by the following:

- Purchase
- B2B Solutions
- Store
- Production
- Master Data
- Mobile Solutions
- System
- Mobile Solutions 2010

For more information on User Configuration, please refer to the Maintenance section of this document.

Purchase

The sub-categories that exist below the Purchase category include:

- Purchase Orders
- VPI(s)
- Receiving
- Invoice Control
- Back Office IFC

Purchase Order

Right	Users can...
Purchase Orders	Allows access to the Ordering module
Create Order by: Order Cycle	Allows the User to create Orders by selecting predefined Order Cycles
Create Order by: Vendor	Allows the User to create Orders by Vendor
Create Order by: Order List	Allows the User to create Orders by Order List
Create Order by: Suggested Order Qty	Allows the User to create Orders based on Suggested Quantities

Right	Users can...
Create Order by: Blank Order	Allows the User to create a Blank Order
Make Individual Orders	Allows the User to create individual Purchase Orders without using Purchasing Lists
Create/Modify List	Allows the User to Create/Modify/Delete Order Lists. Lists are not filtered by Role and are visible to everyone
Purchase/Receive all Items	Allows the User to Purchase/Receive all Items even though no Vendor Purchase Item is available. User will be able to create Vendor Purchase Items himself. This User Right overrules User Right Purchase/Receive Default Vendor Purchase Items only.
Purchase/Receive Default Vendor Purchase Items Only	Allows the User to Purchase/Receive Vendor Purchase Items set to Default/DPQ only. This User Right is overruled by User Right Purchase/Receive all Items
Save Order	Allows the User to create a new Order, add freely selected Items and Items from Lists, and Save or Suspend the Order. If not set, User can only create Orders from existing Lists and will not be able to Save or Suspend
Change Cost Center from List in Ordering	Allows the User to change the Cost Center when Ordering from a List
Show SOH and On Order Qty in Ordering	Displays Item Stock on Hand and On Order Quantity in Ordering
Order over Maximum Quantity	Allows the User to Order more than the Maximum Quantity
Delete suspended Orders	Allows the User to delete suspended Order
Delete placed (open) Orders	Allows the User to delete positions from a placed Order
Purchase Manager for prepared Orders	Grants User to Purchase Manager for prep Orders
Order Cycles	Allows the User to view/add/modify Order Cycles

Right	Users can...
Emergency Order	Allows the User to place an Order outside of a valid Order Cycle, if Order Cycles are used, or allows the User to place an Order if Minimum Qty/Weight/ Value is not met, if Minimum Qty/Weight/Value per Order is used
Order Calculation	Allows the User to view/modify the Order Calculation methods
Order Calculation Lookup	Allows the User to access the Order Calculation Lookup module. Calculate Average Usage must be enabled
Out-of-Stock	Allows the User to access the Items Out of Stock function. Calculate Average Usage must be enabled

VPI(s)

Right	Users can...
VPI(s)	Allows access to the Vendor Purchase Catalog module
Add/Modify VPI(s)	Allows the User to add/modify Vendor Purchase Items
Manage Contract in VPI(s)	Allows the User to access the Control Flag in Vendor Purchase Items
Copy/Compare VPI(s)	Allows access to the Copy/Compare VPI(s) module

Receiving

Right	Users can...
Receiving	Allows the User access to the Receiving module
Create Receipt by: Purchase Order	Allows the User to create a Receipt by Purchase Order
Create Receipt by: List	Allows the User to create a Receipt by List
Create Receipt by: Vendor	Allows the User to create a Receipt by Vendor
Create Receipt by: Blank Receipt	Allows the User to create a Blank Receipt

Right	Users can...
Create Receipt by: Return to Vendor	Allows the User to create a Return to Vendor
Create non-unique Delivery Note Numbers	Allows the User to create non-unique Delivery Note Numbers (includes B2B Solutions)
Change Cost Center from List in Receivings	Allows the User to change the Cost Center when Receiving using a List
Change Prices in Receivings	Allows the User to change prices when Receiving Delivery Notes/Invoices. This will not be possible for Items set to Fixed Prices
Change Net/Gross Prices in Receivings	Allows the User to change the Net/Gross Price in Receiving
Change Taxes in Receiving	Allows the User to change the taxes/VAT in Receiving
Change Discount in Receivings	Allows the User to change the Discounts in Receiving. Fields are disabled if this Right is not enabled
Override Receiving Deviation Settings	Allows the User to overwrite the Receiving Deviation Settings configured in Master Data | Items | Other Settings
Edit Adjustment in Receivings	Allows the User to edit Adjustments in Receiving
Book Receipt	Allows the User to book Delivery Notes. If this Right is not enabled, the User will only be able to Save the Receipt
Change Purchase Order Closing Defaults	Allows the User access to the “Close Purchase Order” option in the Receiving booking dialog
Close Order automatically	Allows access to the Close Purchase Order option in the Receiving booking dialog. This option is enabled by default and can be manually disabled
Save Delivery Note as Invoice	Allows the User to create an Invoice directly when booking a Delivery Note. This option is overruled if the option Receiving as Invoice is disabled in Vendors
Edit Invoice Total in Receiving	Allows the User to modify the Invoice Total in Receipt as Invoice
Delete booked Delivery Notes	Allows the User to delete booked Delivery Notes. Deleted Notes will be displayed with a Cancelled Status

Invoice Control

Right	Users can...
Invoice Control	Allows access to the Invoice Control module
Create non-unique Invoice Numbers	Allows the User to create non-unique Invoice Numbers in Invoice at Receiving (including B2B Solutions) and Invoice Control

Back Office IFC

Right	Users can...
Back Office IFC	Allows access to the Back Office IFC module
Correct Amounts/VAT in B/O IFC	Allows the User to correct Amounts/VAT in Back Office Interface
Close Financial Period	Allows the User access to the Close Financial Period module
Close Financial Period: Open Period	Allows the User to reopen the LAST CLOSED Period
Close Financial Period: Change Period	Allows the User to shift documents between open Periods

B2B Solution

Right	Users can...
B2B Solutions	Allows access to the B2B Solutions module
Item Catalog Cleanup - Select all Vendors	Allows the User to use the Item Catalog Cleanup option for all Vendors at one time
B2B Excel Solutions	Allows access to the license controlled B2B Excel Solutions

Store

The sub-categories that exist below the Store Level category include:

- Issue Requests
- Transfers
- Stock on Hand Control
- Manage Store

- External Logistics
- Waste
- Inventory

Issue Requests

Right	Users can...
Issue Requests	Allows access to the Issue Requests module
Show SOH in Transfer From	Allows the User to see the SOH in the Transfer From module
Delete requested Issue Requests	Allows the User to delete documents in a Requested status
Delete Suspended Issue Requests from other Users	Allows the User to delete documents with an Open/ Saved status that were created by another User
Make Individual Issue Request/Transfers	Allows the User to create individual Issue Request/ Transfer (not from a List) OLD Issue/Request Transfer only
Can not decline Transfers	User is not able to decline a Transfer with a Delivered Status
Can not accept Transfers	User is not able to accept Transfer with a Delivered Status

Transfers

s

Right	Users can...
Transfers OLD	Allows access to the old Transfer Module. This module will be removed in version 7.0
Transfers	Allows access to the Transfers module
Create Transfer To	Allows the User to create a Transfer To document
Create Transfer From	Allows the User to create a Transfer From document
Create Transfer To from List	Allows the User to create a Transfer To document from a List
Create Transfer From from List	Allows the User to create a Transfer From document from a List
Save Issue Request/ Transfer as List	Allows the User to save Issue/Request Transfers as a List

Right	Users can...
Add Items to IR/ Transfers created from List	Allows the User to add Items to Issue Request/ Transfers created from a List
Change Cost Center from List in Transfer To	Allows the User to change the Cost Center in a Transfer To from List
Show SOH in Transfer To	Allows the User to see the Stock on Hand in the Transfer To module
Change Cost Center from List in Transfer From	Allows the User to change the Cost Center in a Transfer From from List
Delete Suspended Transfer To from other Users	Allows the User to delete documents with an Open/ Suspended status that have been create by other Users in the Transfer To module
Quick Booking of Transfers	Allows the User to book open Transfers from the Transfer Overview screen
Manage Cost Center Areas	Allows the User to view/add/modify Cost Center areas for the Transfers module
Use Cost Center Areas	Enables the Cost Center Area filter for the User in the Transfers module
Manually Book External Logistics Transfer	Allows the User to book Requested External Logistics Transfer

Stock on Hand Control

Right	Users can...
Stock on Hand Control	Allows access to the Stock on Hand Control module

Manage Store

Right	Users can...
Manage Store	Allows access to the Manage Store module
Change Control SOH	Allows the User to change MIN and POT SOH in the Manage Store module

Right	Users can...
Change Unit	Allows the User to change the Store Unit in Manage Store and add additional Units for use in Inventory Counts
Change AVE	Allows the User to change the average price of an Item. The system will generate an inventory correction for this
Delete Items from Store	Allows the User to delete Items from a Store that have a Stock on Hand of 0
Storage Locations: Convert	Allows access to the Convert Function in the Stock Take Lists
Copy Storage Locations	Allows the User to copy Storage Locations
Copy Units	Allows the User to copy Units from one Store to another.

External Logistics

Right	Users can...
External Logistics	Allows access to the External Logistics module

Waste

Right	Users can...
Waste	Allows access to the Waste module
Create Waste by: List	Allows the User to create a Waste by List
Create Waste by: Blank Waste	Allows the User to create a Blank Waste
Change Cost Center from List in Waste	Allows the User to change the Cost Center in a Waste from a List

Inventory

Right	Users can...
Inventory: call Module	Allows access to the Inventory and Stock Taking module
Inventory: generate	Allows the User to generate Inventories

Right	Users can...
Inventory: generate Blank Inventory	Allows the User to generate Blank Inventories
Inventory: generate Inventory by Count Cycle	Allows the User to generate Inventories by Count Cycle
Inventory: generate Inventory by List	Allow the User to generate Inventories by List
Inventory: Create Start of Day Count	Allows the User to create Start of Day counts
Inventory: Create Mid-day Count	Allows the User to create Mid-day counts
Inventory: Create End of Day Count	Allows the User to create End of Day counts
Override Unit Collection Method	Allows the User to override the default Inventory Collection Method. If disabled, Collection Method is not accessible in Inventory creation screen
Override Closing Method	Allows the User to override the default Closing Method. If disabled, Closing Method is not accessible in Inventory creation screen
Inventory: Add Item/ Unit	Allows the User to add Items/Units to Inventory counts
Inventory: visible POT Qty	Allows the User to see the potential quantities and values in the Inventory module. Deviation details are also displayed
Inventory: freeze	Allows the User to freeze an Inventory count
Inventory: edit Frozen	Allows the User to edit a Frozen Inventory count
Inventory: unfreeze	Allows the User to unfreeze a Frozen Inventory count
Inventory: book	Allows the User to book an Inventory count.
Inventory: unbook	Allows the User to reopen the most recently booked Inventory Count for a Cost Center
Manage Count Cycles	Allows the User to manage Count Cycles
Add Lists to Count Cycles	Allows the User to add Lists to Count Cycles
Add Item Groups to Count Cycles	Allows the User to add Item Groups to Count Cycles

Right	Users can...
Add Items to Count Cycles	Allows the User to add Items to Count Cycles
Inventory Daily Variance	Allows access to the Inventory Daily Variance report

Production

The sub-categories that exist below the Production category include:

- Recipes
- Search Recipe Components
- Nutrients
- Menu Item Linking
- Production
- Yield Management

Recipes

Right	Users can...
Recipes	Allows access to the Recipes module
Save Recipes	Allows the User to create and edit Recipes
Manage Recipes	Allows the User to add and modify Recipes
Manage Corporate Recipes	Allows the User to manage Corporate Recipes
Show COS of Recipes	Allows the User to see the Recipe Cost of Sales
Show Recipe History	Allows access to the Recipe history or, if enabled, the Audit Trail
Recipe - Allow editing manual nutrients	Allows the User to enter nutrients manually into the Recipe
Edit Recipe Nutrient Status	Allows the User to edit Recipe Nutrient Status

Search Recipe Components

Right	Users can...
Search Recipe Components	Allows access to the Search Recipe Components module
Replace Items	Allows the User to replace Items in the Search Recipe Components module

Preparation Types

Right	Users can...
Preparation Types	Allows access to the Preparation Types module
Save Preparation Types	Allows the User to set up new and change existing Preparation Types

Nutrients

Right	Users can...
Nutrient Groups	Allows access to the Nutrient Groups module
Import Nutrient Catalog	Allows the User access to the Nutrient Catalog module and the ability to Import/Update a Catalog
Delete Nutrient Catalog	Allows the User to delete an imported Nutrient Catalog

Menu Item Linking

Right	Users can...
Menu Item Linking	Allows access to the Menu Item Linking module and allows the User to edit Linking. This Right enables the Linking tab in the Recipes module, as well.

Production

Right	Users can...
Production	Allows access to the Production Module
Change Cost Center from List in Productions	Allows the User to change the Cost Center in a Production from a List
Preparation and Thaw Pull Reporting	Allows access to the Preparation and Thaw Pull reporting

Yield Management

Right	Users can...
Yield Containers	Allows the User to view/add/modify Yield Containers
Yield Management	Allows access to the Yield Management module
Use all Items as Yield Base Items	Allows the User to use all available Items as Base Item in Yield

Master Data

The categories that exist under the Master Data category include:

- Cost Center/Stores
- Taxes
- Vendors
- Items
- Item Groups
- Over Groups
- Usage Groups
- Categories
- Account Classes
- Adjustments
- Cost Center Groups
- Foreign Currency
- Vendor Groups
- Units
- Major Groups
- Recipe Groups
- Reason Codes
- Import Master Data
- Clients
- Master Data Translation

Cost Center/ Store

Right	Users can...
Cost Centers/Stores	Allows access to the Cost Centers/Stores module
Save Cost Centers/ Stores	Allows the User to create new and modify existing Cost Centers/Stores

Cost Center Groups

Right	Users can...
Cost Center Groups	Allows access to the Cost Center Groups module
Save Cost Center Groups	Allows the User to create new and modify existing Cost Center Groups

Taxes

Right	Users can...
Taxes	Allows access to the Taxes module
Save Taxes	Allows the User to define and modify Taxes

Foreign Currency

Right	Users can...
Foreign Currency	Allows access to the Foreign Currency module
Save Foreign Currency	Allows the User to create new and modify existing Foreign Currencies and Exchange Rates

Vendors

Right	Users can...
Vendors	Allows access to the Vendors module
Save Vendors	Allows the User to create new and modify existing Vendors
Vendor Cost Center Profile	Allows access to the Vendor Cost Center Profile module

Right	Users can...
Save Vendor Cost Center Profile	Allows the User to create new and modify existing Vendor Cost Center Profiles
Manage Corporate Vendors	Allows the User to manage and edit Corporate Vendors
Vendor/Cost Center assign	Allows the User to assign Vendors to Cost Centers in the Vendors module

Vendor Groups

Right	Users can...
Vendor Groups	Allows access to the Vendor Groups module
Save Vendor Groups	Allows the User to create new and modify existing Vendor Groups

Items

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Right	Users can...
Items	Allows access to the Items module
Save Items	Allows the User to create new and modify existing Items
Manage Corporate Items	Allows the User to manage/edit Corporate Items
Save Standard Prices	Allows the User to save Standard Prices for Items
Items - Allow Adding/ Editing Nutrient Links	Allows the User to add and edit Nutrient Links via the Nutrient Catalog
Item - Allow editing manual nutrients	Allows the User to manually edit Item Nutrient information
Edit Item Nutrient Status	Allows the User to edit an Item’s Nutrient Status

Units

Right	Users can...
Units	Allows access to the Units module
Save Units	Allows the User to create new and modify existing Units
Manage Production Units	Allows the User to manage Production Units

Item Groups

Right	Users can...
Item Groups	Allows access to the Item Groups module
Save Item Groups	Allows the User to create new and modify existing Item Groups

Major Groups

Right	Users can...
Major Groups	Allows access to the Major Groups module
Save Major Groups	Allows the User to create new and modify existing Major Groups

Over Groups

Right	Users can...
Over Groups	Allows access to the Over Groups module
Save Over Groups	Allows the User to create new and modify existing Over Groups

Recipe Groups

Right	Users can...
Recipe Groups	Allows access to the Recipe Groups module

Usage Groups

Right	Users can...
Waste Groups	Allows access to the Waste Groups module
Waste Over Groups	Allows access to the Waste Over Groups module

Reason Codes

Right	Users can...
Reason Codes	Allows the User to create new and modify existing Reason Codes

Categories

Right	Users can...
Categories	Allows the User to create new and modify existing Categories

Import Master Data

Right	Users can...
Import Master Data	Allows access to the Import Master Data module. This Right should ONLY be assigned to a Sys Admin

Account Classes

Right	Users can...
Account Classes	Allows access to the Account Classes module
Save Account Classes	Allows the User to create new and modify existing Account Classes

Clients

Right	Users can...
Clients	Allows access to the Clients module
Save Clients	Allows the User to create new and modify existing Clients

Adjustments

Right	Users can...
Adjustments	Allows access to the Adjustments module
Save Adjustments	Allows the User to create new and modify existing Adjustments
Fiscal Fields	Allows access to the Fiscal Fields module
Save Fiscal Fields	Allows the User to create new and modify existing Fiscal Field Code

Master Data Translation

Right	Users can...
Master Data Translation	Allows access to the Master Data Translation module

Mobile Solutions

Right	Users can...
Mobile Solutions	Allows access to the Mobile Solutions module and all functions within
Update ACT SOH	Allows the User to change the setting for Update/ Overwrite SOH through Mobile Inventory Count import
Edit Mobile Stock Take Lists	Allows the User to change the configuration for the Mobile Stock Take List
Mobile Solutions 2010 Client	Allows access to the Mobile Solutions 2010 Client module

System

The categories that exist under the System category include:

- System Functions
- List Management
- Scheduler Functions
- Other
- General Functions

System Functions

Right	Users can...
Change Password	Allows the User to change their Password
Users	Allows the User to create new and modify existing Users. Users with this privilege may also change other Users' Passwords and Rights.
Departments	Allows the User to create new and modify existing Departments. Users with this privilege may also set access rights to Departments
Configurations	Allows access to the Configuration module **NOTE! Only the System Administrator should possess this right**
Document Numbers	Allows access to the Document Numbers module **NOTE! Only the System Administrator should possess this right**
Data Base Update	Allows access to the Database Update **NOTE! Only the System Administrator should possess this right**
Settings	Allows access to the Settings module

List Management

Right	Users can...
List Management	Allows access to the List Management module
Purchasing Lists	Allows the User to create new and modify existing Ordering/Receiving List in the List Management module and when using the 'Save as List' option in other modules

Right	Users can...
Inventory Lists	Allows the User to create new and modify existing Inventory Lists
Issue Request/Transfer Lists	Allows the User to create new and modify existing Issue Request/Transfer Lists
Waste Lists	Allows the User to create new and modify existing Waste Lists
Production Lists	Allows the User to create new and modify existing Production Lists
Add Items to Order/ Receipt created from List	Allows the User to add Items to an Order/Receipt created from a List
Add Items to Waste created from List	Allows the User to add Items to a Waste created from a List
Add Items to Inventory created from List	Allows the User to add Items to an Inventory created from a List
Add Items to Production created from List	Allows the User to add Items to a Production created from a List
Add Items to Yield created from List	Allows the User to add Items to a Yield created from a List
Add Items to Order Request created from List	Allows the User to add Items to an Order Request created from a List
Add Items to Master Order List	Allows the User to add Items to a Master Order List
Approve Master Order List	Allows the User to set the status of a Master Order List to Approved
Finish Master Order List	Allows the User to set the status of a Master Order List to Finished

Scheduler Functions

Right	Users can...
Scheduler	Allows the User to create new and modify existing MIA2 Scheduler Jobs

Others

Right	Users can...
Can not backdate Receiving	Prevents the User from adding a Receipt for a past date
Can not backdate RTS	Prevents the User from adding a Return to Vendor for a past date
Can not backdate Inventory Count	Prevents the User from adding an Inventory Count for a past date
Can not backdate Invoicing	Prevents the User from adding an Invoice for a past date
Can not backdate Waste	Prevents the User from adding a Waste for a past date
Can not backdate Yield	Prevents the User from adding a Yield for a past date
Can not backdate Production	Prevents the User from adding a Production for a past date
Can not backdate Requisition/Transfer	Prevents the User from adding a Requisition/Transfer for a past date
Can not backdate Sales Order	Prevents the User from adding a Sales Order for a past date
Show Prices	Allows the User to see Prices

General Functions

Right	Users can...
Booking in Last Period Allowed	Allows the User to book Receivings and Transfers in the last period
Manage global Visibility Criteria	Allows the User to manage global Visibility Criteria, i.e. assigning Cost Centers to Lists and Recipes
Disable Auto Run	Disables the automatic generation of a result set in all modules so that the User may select filter options before Refreshing the page. (Not applicable to MIA2 Scheduler | Edit Jobs)

Mobile Solutions 2010

The categories that fall under the Mobile Solutions 2010 category are:

- Inventory
- Transactions
- Mobile Device Management

Inventory

Right	Users can...
Inventory	Allows the User to import data, enter Inventory Counts, and prepare exports
Inventory Barcode Assignment	Allows the User to assign new Barcodes in Mobile Solutions.
Inventory Configuration	Allows access to the Mobile Solution Inventory Configuration module

Transactions

Right	Users can...
Purchase Orders	Allows access to the Mobile Solutions Purchase Order module
Purchase Order Barcode Assignment	Allows the User to assign new Barcodes in the Mobile Solutions Purchase Order module
Receivings	Allows access to the Mobile Solutions Receivings module
Receivings Barcode Assignment	Allows the User to assign new Barcodes in the Mobile Solutions Receivings module
Transfers	Allows access to the Mobile Solutions Transfers module
Transfers Barcode Assignment	Allows the User to assign new Barcodes in the Mobile Solutions Transfers module
Transactions Configuration	Allows access to the Mobile Solutions Transactions module

Mobile Device Management

Right	Users can...
Open Module	Allows access to the Mobile Device Management module in myinventory
Edit Device Name and Location	Allows the User to edit the Device name and the Location assignment
Delete Device	Allows the User to delete a Device