

Physical Inventory Quick Reference Guide

Before entering your Physical Inventory in CNCentral, print the Physical Inventory Report and conduct an actual Physical Inventory using the report. Follow this link for more information on accessing the report: <https://inteamhelp.zendesk.com/hc/en-us/articles/1500008986302-Physical-Inventory-Report>

Steps to Start a New Physical Inventory:

1. Select “Inventory” from the left-hand menu.
2. Select the “Physical Inventory” button in the top right.

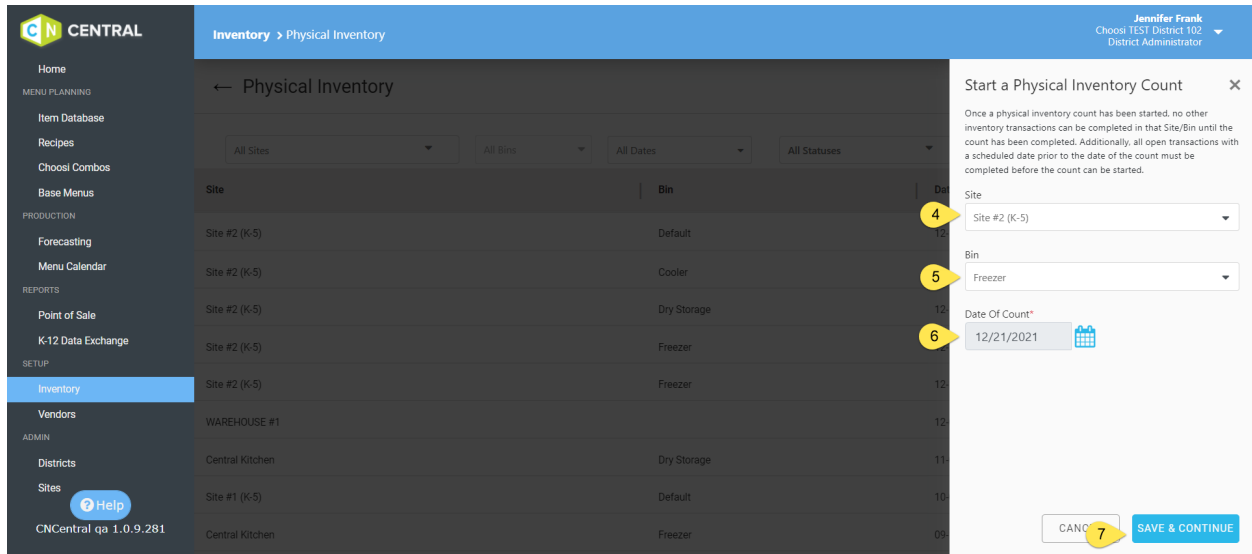
The screenshot shows the CNCentral interface. The left-hand menu is on the left, with 'Inventory' selected. The main area displays an 'Inventory' table. The table has the following columns: Item Name, District ID, Pack Size, Net Weight (Lbs), USDA Commodity, Qty on Hand, Uncommitted Qty, and Inventory Unit. The table contains several rows of inventory items. A yellow callout '2' points to the 'PHYSICAL INVENTORY' button in the top right corner of the main area.

3. Click the blue plus sign button on the bottom right-hand side of your screen, and select “Start Count”

The screenshot shows the CNCentral 'Physical Inventory' page. The left-hand menu is on the left, with 'Inventory' selected. The main area displays a 'Physical Inventory' table. The table has the following columns: Site, Bin, Date of Count, and Status. The table contains several rows of physical inventory items. A yellow callout '3' points to the blue plus sign button in the bottom right corner of the main area.

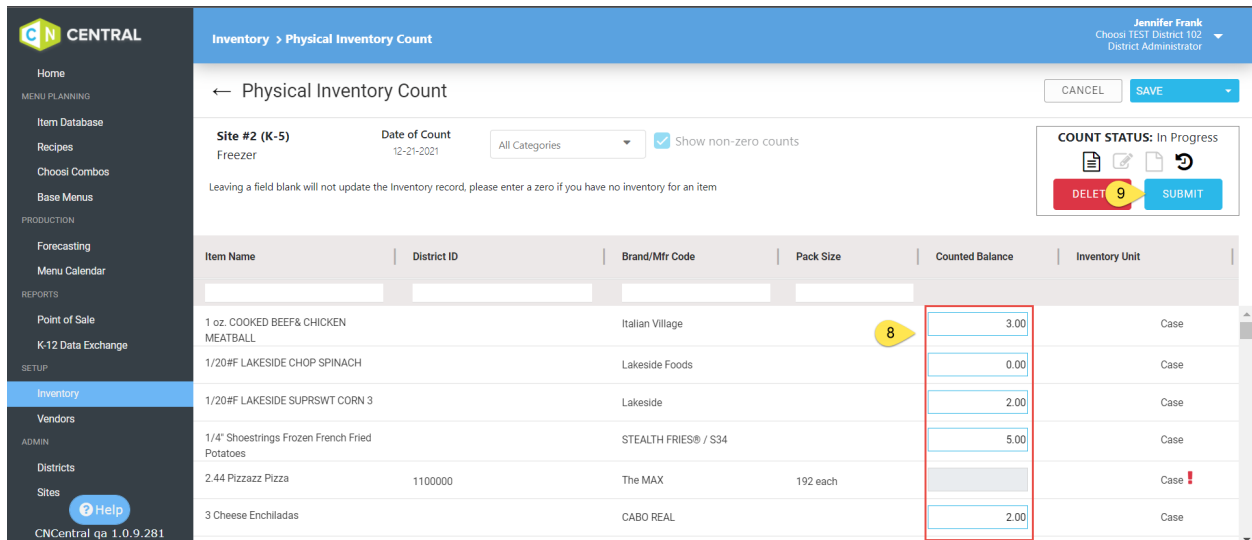
5. Selecting your “Bin”, if applicable. (This is essentially the storage location of the product.)
6. Select the “Date” (note that only the current date or past dates will be available for selection)

7. Click the “Save & Continue” button



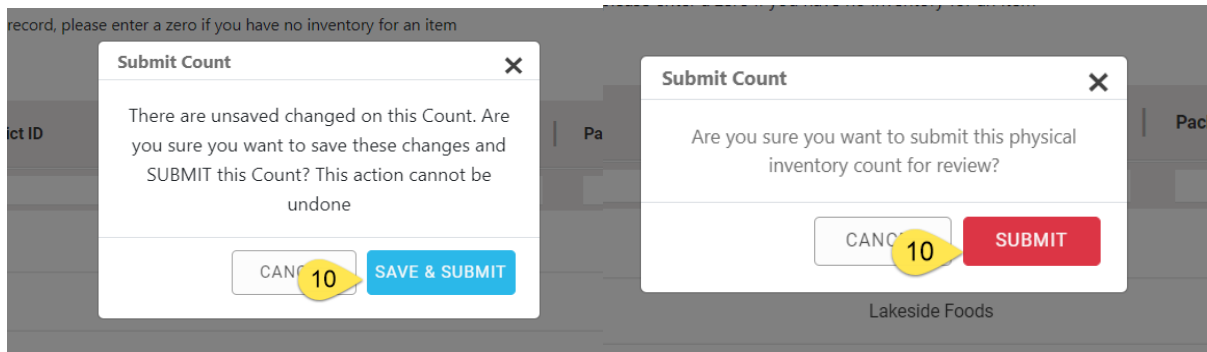
8. Add your numbers to the “Counted Balance” field.

9. When all entries for an entire “Bin” have been made, select “Submit”.



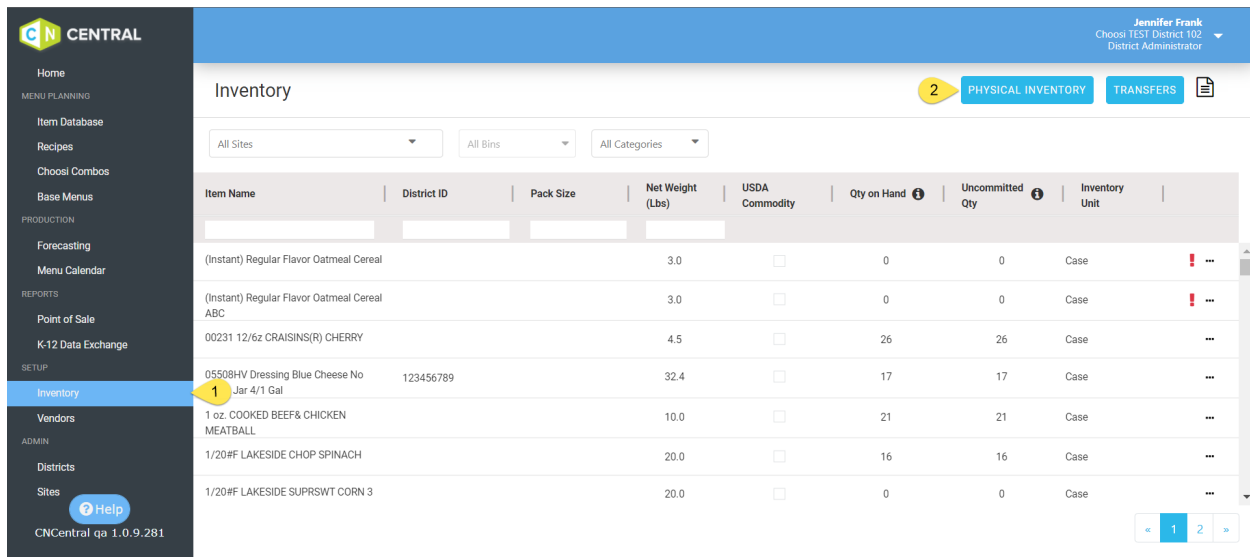
10. If you have not saved the count, you'll be asked if you want to “Save & Submit”. Click the “Save & Submit” if you're ready to submit your count. If you have saved the count, you'll simply be asked if you want to “Submit”. Click the “Submit” button if you're ready to submit your count.

Updated as of December 21, 2021



Steps to Edit/Complete an Existing Physical Inventory:

1. Select “Inventory” from the left-hand menu.
2. Select the “Physical Inventory” button in the top right.



3. Locate from the list of Physical Inventories the count you’d like to edit or complete and click the three dots icon and select “Edit”. Use the filters across the top if necessary to refine the results and make it easier to locate the desired count.

The screenshot displays the 'Physical Inventory' page in the CN Central system. The left sidebar contains a navigation menu with sections: Home, MENU PLANNING (Item Database, Recipes, Choosi Combos, Base Menus), PRODUCTION (Forecasting, Menu Calendar), REPORTS (Point of Sale, K-12 Data Exchange), and SETUP (Inventory, Vendors). The main area shows a table of inventory counts. A red box highlights the filter area at the top of the table, which includes dropdown menus for 'All Sites', 'All Bins', 'All Dates', and 'All Statuses'. The table has columns for Site, Bin, Date of Count, Status, and actions. The first row shows 'Site #2 (K-5)' with a 'Freezer' bin, dated '12-21-2021', and a status of 'In Progress'. A yellow callout '3' points to the 'Edit' and 'Delete' buttons in the actions column for this row. Other rows show various bins like 'Default', 'Cooler', and 'Dry Storage' at different sites, with statuses ranging from 'Complete' to 'In Progress'.

4. Make any changes necessary to the inventory numbers previously input or finish entering numbers for an inventory count. When ready to submit, follow steps 9 & 10 above to submit a complete physical inventory count.

Tips and Troubleshooting:

1. You can save your work as you are entering your Physical Inventory counts by clicking on the “Save” button at any time. Saving your work will allow you to retain any data entered and exit the Physical Inventory to return to it at any time while it is in the “Pending” status with all previously entered data.
2. If an Item has a red exclamation point next to the Inventory Unit on the right, it is either missing a price or the item has not been confirmed on the Inventory Setup screen. If the Inventory Setup has not been confirmed; you will need to confirm the Inventory Setup information before continuing the physical inventory for this item. If it’s missing a price; you will only be able to complete a physical inventory count that subtracts from the Inventory balance, not adds. You can add a price in the Vendors section.
3. If you are looking for a specific Item, use the textbox under the “Description” field to quickly filter the list to find your Item or you can use the “Category” filter to find items.
4. Once a count has been submitted and has a status of “Complete” users will not be able to delete a physical inventory count. While it is still in the “In Progress” status, counts can be edited or deleted if necessary.

Updated as of December 21, 2021

Inventory > Physical Inventory Count

Jennifer Frank
Choosi TEST District 102
District Administrator

← Physical Inventory Count

CANCEL 1 SAVE

Site #2 (K-5) Date of Count 12-21-2021 All Categories Show non-zero counts

Leaving a field blank will not update the Inventory record, please enter a zero if you have no inventory for an item

COUNT STATUS: In Progress 4

DELETE SUBMIT

Item Name	District ID	Brand/Mfr Code	Pack Size	Counted Balance	Inventory Unit
1 oz. COOKED BEEF& CHICKEN MEATBALL		Italian Village		3.00	Case
1/20#F LAKESIDE CHOP SPINACH		Lakeside Foods		0.00	Case
1/20#F LAKESIDE SUPRSWT CORN 3		Lakeside		2.00	Case
1/4' Shoestrings Frozen French Fried Potatoes		STEALTH FRIES® / S34		5.00	Case
2.44 Pizzazz Pizza	1100000	The MAX	192 each		Case 2
3 Cheese Enchiladas		CABO REAL		2.00	Case

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5. You will not be able to perform a Physical Inventory count if there are open Transfers and/or Orders made in the site you're trying to perform a Physical Inventory for prior to the date of the Physical Inventory count. The system will not allow this action. Those transactions must be closed before a count can be started.

For more help on conducting a Physical Inventory, check out this video:

<https://inteamhelp.zendesk.com/hc/en-us/articles/1500007918142-Manager-Conducting-a-Physical-Inventory>