HOW TO SET UP SHELF TO SHEET INVENTORY

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Part of **CONTROLLING FOOD COST** Procedure

The goal of shelf to sheet inventory is to count inventory in the most efficient way possible by having the items on the Weekly Inventory sheet show up in the same order they are stored. This procedure also shows how to modify the sort order of inventory items in the POS so that they match the sort order of your Weekly Inventory.

**Determine the order of inventory items:**

* **Step 1**: Download and print a blank copy of the Weekly Inventory sheet from the "[Nightly-Weekly Inventory](https://toppershq.sharepoint.com/_layouts/15/WopiFrame.aspx?sourcedoc=%7B09298280-09DF-4EFE-A6A7-ACE2BB24F616%7D&file=Nightly-Weekly%20Inventory.xlsx&action=default)" tool
  + Once you open the tool from Toppers OS, it will be in an online format. You will need to download it locally to your computer to use all the Excel features. Click on the menu button (looks like 3 dots) on the right side of the screen, and select "Download". Or, click on “File”, then click “Save As”, then choose “Download a Copy”.
* **Step 2**: Go to the farthest storage shelf of the back of the store
* **Step 3**: Log the order of each item on the first shelf in the “Sort Order” column of the printed Weekly Inventory sheet
  + Ex. Top-left item = Write “1” next to the item name in the Weekly Inventory sheet
  + Ex. Item to the right of item 1 is item 2. Write “2” next to the item name in the Weekly Inventory sheet
* **Step 4**: Move to the next storage area/shelf to the right and repeat Step 3
  + Continue numbering where you left off
    - Ex. If the last item on shelf 1 was number 12, the first item on shelf 2 should be number 13
  + Continue this process until each item in the back of the store in numbered on the Weekly Inventory sheet
* **Step 5**: Move to the walk-in cooler and repeat Steps 3-4
* **Step 6**: Move to the front of the store and repeat Steps 3-4
  + All items should be numbered at this point

*Note: Sometimes items are found in multiple places. Base the sort order on where the actual full case lives (e.g. if something is found in two places, the order on shelf to sheet should be where the full case of that items lives***)**

**Update the Weekly Inventory sheet sort order:**

* **Step 7**: Open up the "[Nightly-Weekly Inventory](https://toppershq.sharepoint.com/_layouts/15/WopiFrame.aspx?sourcedoc=%7B09298280-09DF-4EFE-A6A7-ACE2BB24F616%7D&file=Nightly-Weekly%20Inventory.xlsx&action=default)" Excel sheet and click on the “Weekly Inventory” tab
* **Step 8**: Using the printed copy of the Weekly Inventory sheet, type in the appropriate numbers for each item into the “Sort Order” column based on the numbers you assigned on the printed copy
* **Step 9**: Click on any cell in the “Sort Order” column
* **Step 10**: Right click and select “Sort”, then click ”Sort smallest to largest”
  + This will put all inventory items into the correct order based on the numbers you assigned to each item
* **Step 11**: Save the spreadsheet onto your local computer

**Change the sort order of items in the POS**

* **Step 12**: Print a copy of your sorted Weekly inventory sheet
* **Step 13**: Go to the Setup section of the POS
* **Step 14**: Click "Inventory"
* **Step 15**: Click "Inventory Items"
* **Step 16**: Click the "Display Order" button (button with red and blue arrows)
* **Step 17**: Find the last item on your printed copy of the Weekly Inventory list within the POS Sort Order
* **Step 18**: Click on the item, then click the “Up” arrow with a line above it to send the item to the top of the list
* **Step 19**: Find the 2nd to last item on the Weekly Inventory list within the POS Sort Order and click the “Up” arrow with a line above it to send the item to the top of the list
* **Step 20**: Continue this process of sorting from the bottom to the top until you sort all items
  + The sort order in the POS should now match the sort order of the Weekly Inventory sheet. This will make it efficient when entering inventory into the POS because everything is in the same order.