



MacromatiX – Counts

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The key process for Counts

Inventory management has a direct impact on the profit & loss of a Restaurant. Regular and accurate counts of stock on hand will show the food costs to the business. Macromatix can help you clearly see if there are Inventory variances so you can investigate quickly to reduce any loss in stock or profit.

Regular and accurate Inventory Counts also ensure you have the correct amount of stock on hand to run your Restaurant and feed your hungry customers

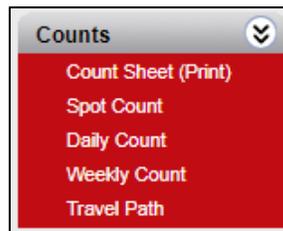
Count sheet print

This function allows you to see a printable list of your inventory count sheet. Here you can choose the type of count sheet to print (Spot check, Daily, weekly or Monthly)

During daily usage the user must select the stock count from the workflow. On Monday nights the workflow will have a weekly stock count appear along with the last day of the month that will have a monthly count reflect.

How to print out the count sheet

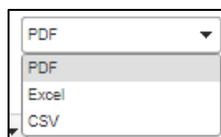
- From the Menu tab, select the 'Count' category, then select the 'count sheet(print)' task.



- The following screen will appear.

A screenshot of the 'Count Sheet (Print)' form. The form has a title 'Count Sheet (Print)' and a 'Generate' button. Below the title, there is a instruction: 'Specify the required selection criteria below, then click the Generate button to create the report.' There is a dropdown menu for 'Store' with the selected value 'KFC Lab 105 (Soda Fountain/Coffee)'. There is a dropdown menu for 'Count Type' with the selected value 'Spot Check'. There is a checkbox for 'Print Mode' which is currently unchecked. There is also a dropdown menu for the output format, currently set to 'PDF'.

- Use the drop-down arrow to select the type of print. (PDF, Exel, CSV)



- Use the drop-down arrow to select the count type.

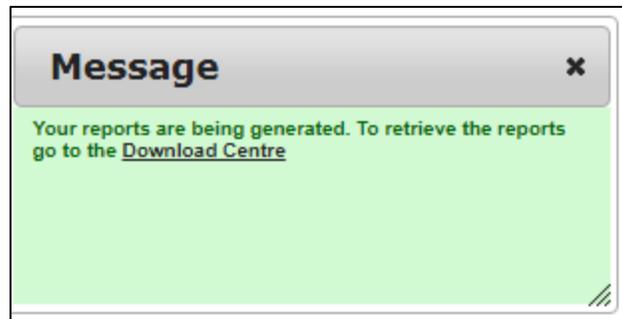
Count Type: Spot Check
 Print Mode

- Spot Check
- Daily
- Weekly
- Periodic
- Monthly

- Then click on generate.

Generate

- A confirmation pop-up will appear once the report has been generated.



- Click on **Download Centre** on the pop-up message, as it will take you to the Download Centre screen.

Download Centre

Period: All Status: Not Downloaded

Download Delete Email Enter valid comma separated email addresses Show details Show all reports for store

<input type="checkbox"/>	Report Type	Title	Generate Date	Status	Size	
<input type="checkbox"/>	Reporting Services	Count Sheet (Print)	2020-07-10 07:23:22 AM	Ready	93 Kb	Download Email Delete
<input type="checkbox"/>	Reporting Services	Count Sheet (Print)	2020-07-10 07:23:52 AM	Ready	80 Kb	Download Email Delete
<input type="checkbox"/>	Reporting Services	Count Sheet (Print)	2020-07-10 09:08:22 AM	Ready	100 Kb	Download Email Delete

Refresh

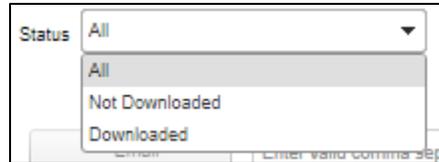
1 30 | Displaying page 1 of 1, items 1 to 3 of 3.

The user may either download, email or delete the report.

- Use the drop-down arrow to select periods.



- Use the drop-down arrow to select status.



How to download the count sheet

- Tick the left-hand side box of the count sheet. Select Download

A screenshot of a web application's report table. The table has columns for 'Report Type', 'Title', 'Generate Date', 'Status', and 'Size'. The first row is selected, and the 'Download' button is highlighted with a red box.

<input type="checkbox"/>	Report Type	Title	Generate Date	Status	Size	
<input checked="" type="checkbox"/>	Reporting Services	Count Sheet (Print)	2020-07-10 07:23:22 AM	Ready	93 Kb	Download Email Delete

- The count sheet report will be downloaded onto your system and the manager can print it out.

A screenshot of an 'Inventory Count WorkSheet - Daily' report for KFCZA. The report is generated at 2020-07-10 08:23 AM for Restaurant: KSA1130 CARLETONVILLE 3. The location is 'Store Room'. The table shows the following data:

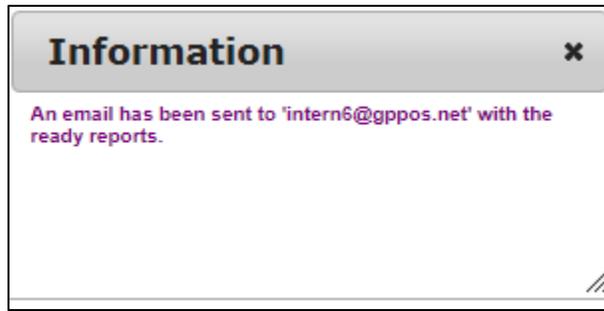
Closing Stock	Case	Inner	Weight	Unit
Whole Egg - KMI082203				Each
Dip - Jalapeno/chut Pots - KMI093095	CASE/336EA			Each
Dip Pots - Bbq Sauce - KMI093098	CASE/200 X 40G JARS			Each

How to email the count sheet

- Tick the left-hand side box of the count sheet and select Email
- Enter the valid email address and click on email.

<input type="checkbox"/>	Report Type	Title	Generate Date	Status	Size	
<input checked="" type="checkbox"/>	Reporting Services	Count Sheet (Print)	2020-07-10 07:23:22 AM	Ready	93 Kb	Download Email Delete

- A confirmation pop-up will appear.

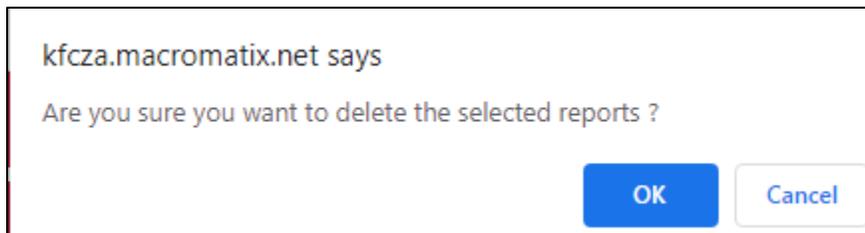


How to delete the count sheet

- Tick the left-hand side box of the count sheet. Select Delete

<input type="checkbox"/>	Report Type	Title	Generate Date	Status	Size	
<input checked="" type="checkbox"/>	Reporting Services	Count Sheet (Print)	2020-07-10 07:23:22 AM	Ready	93 Kb	Download Email Delete

- A confirmation pop-up will appear and click on "OK"



Spot Count

Spot count is the practice of counting your retail products in person. The process typically involves a retail staff member (or team of workers) going through the retailer's sales floor and stock room and counting each item.

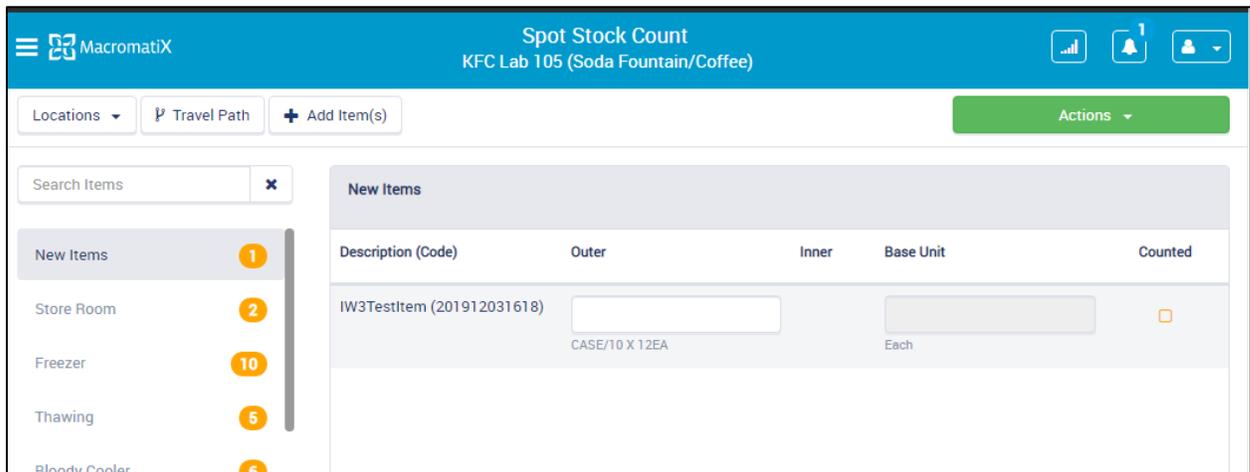
Spot count is done in throughout the day as required by the manager.

How to complete a Spot Count

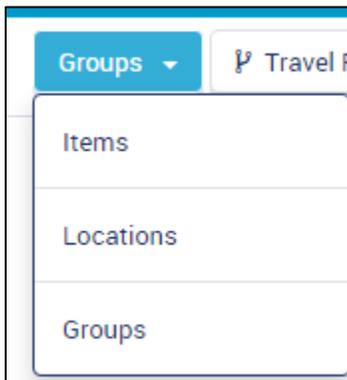
- From the Menu tab, select the 'Count' category, then select the 'spot count' task.



- The mobile MacromatiX site will load on the screen

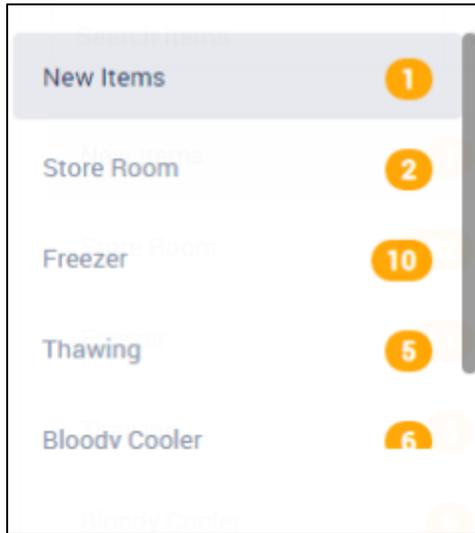


- Use the drop-down arrow to select locations panel.



- Item:**
- Location:** are the area within a store where stock is kept.
- Groups:** are department where the stock are entered

- The screen will refresh and on the left panel you will see a list of stock locations with the total amount of inventory items stored there.



Shaded in grey is the location that you are currently counting items in.

- Example Freezer

The number inside the circle indicates how many items are still to be counted in that location.

The color of the circle indicates the current result of the count in this location

- Green tick** = Counted and is within expected tolerance.
- Red tick** = Counted but there is a variance for that item.
- Orange dots** = The item has been partially counted as it is also still to be counted in another location

Freezer				
Description (Code)	Outer	Inner	Base Unit	Counted
Chicken - Nuggets (KMI018009)	<input type="text"/>		50 Each	✓
Soft Drink Pet Bottle 440 MI (KMI041304)	<input type="text"/>		90 Each	...

Description (Code)	Outer	Inner	Base Unit	Counted
IW3TestItem (201912031618)	50 CASE/10 X 12EA			✓

The main screen panel will display inventory items from the location that is shaded grey

Freezer				
Description (Code)	Outer	Inner	Base Unit	Counted
Chicken - Nuggets (KMI018009)	<input type="text"/>		<input type="text"/>	<input type="checkbox"/>
	CASE/421 EA		Each	
Soft Drink Pet Bottle 440 ML (KMI041304)	<input type="text"/>		<input type="text"/>	<input type="checkbox"/>
	CASE/24 X 440ML EA		Each	

After counting the item, enter the amounts in the matching unit of measure field.

Once a unit has been entered, the tick box on the right-hand side of the item will change to one of three results:

- Green tick = Counted and is within expected tolerance.
- Orange tick = Counted but there is a variance for that item.
- Blue dots = The item has been partially counted as it is also still to be counted in another location.
- Once you have counted all items, click on the "Action" tab on the top right-hand side and select one of the following 4 options. (Submit, save, review count and delete)
- **Submit:** to submit, click on the submit tab and the following pop-up will appear with the summary of count.
- Click on Submit count to finalize the count and a confirmation pop-up will appear.

Actions ▾	
	Submit
	Save
	Review Count
	Delete

Finish Count

Items that still need to be counted: **39**

Items with counts that result in a large variance: **5**

Items with a large positive variance: **5**

Items with a large negative variance: **0**

Will be applied as at July 10 2020 12:55 PM

- **Save:** click on the save tab and a confirmation pop-up will appear.

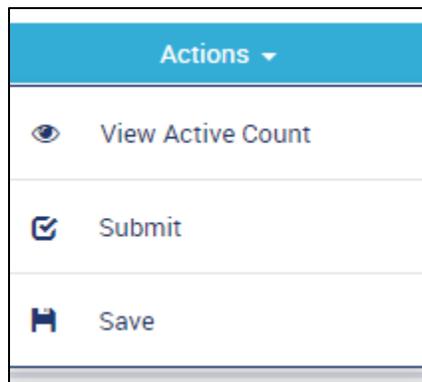


- **Review Count:** The review count shows you the inventory values in a summary prior to applying the count to the system. This provides you with a sanity check before submitting the count.

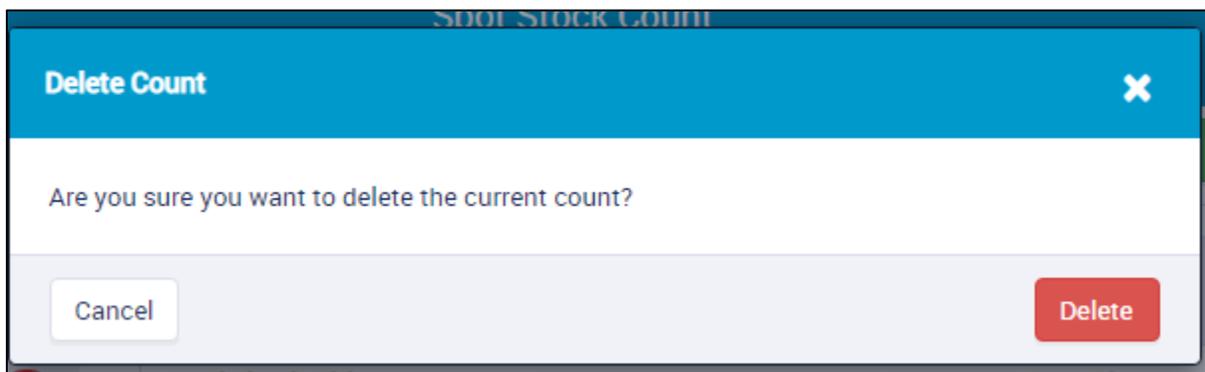


Total		Inventory activity since - 07/10/2020 4:06 AM					
Description	UOM	Begin Count	Counted	Variance	Actual Usage	Total Cost Value	Food Cos
IW3TestItem (201912031618)	Each	2400	6000	3,600.00	-R30,000.00	R30,000.00	-6,158.52
Soft Drink Pet Bottle 440 MI (KMI041304)	Each	90	50	-39.00	R213.67	R267.08	43.86 %
Chicken - Nuggets (KMI018009)	Each	50	50	0.00	R0.00	R39.53	0.00 %

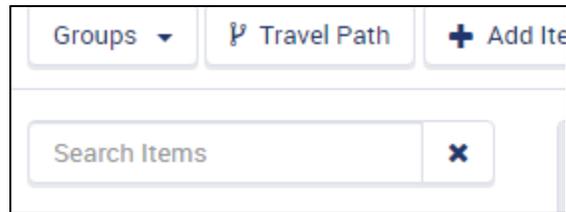
- To return to the count after viewing this screen, select the 'Actions' tab, then select 'View Active Count'.



- The user may edit the counts, then save or submit.
- Delete:** click on the delete tab.
- A confirmation box will appear, and the user may select to delete the count and it will not be applied



- When completing an inventory count, use the **Search Items** field above the locations panel.



The screenshot shows a search interface with three buttons at the top: 'Groups' with a dropdown arrow, 'Travel Path' with a location pin icon, and '+ Add Item'. Below these is a search input field containing the text 'Search Items' and a clear button (X).

- Use the tab located above the search field and select to search by location, items or groups.
- Begin to slowly type an item name into this field. The items with those letters in it will appear.



The screenshot shows the search interface with the letter 'F' typed into the search field. A dropdown menu of suggestions is displayed below the field. The suggestions are:

- Chicken - Fzn Mt Zinger Wings (KMI010021A)
- Chicken -mt Zinger Fillet (KMI010031A)
- Chicken - Mt Mini Fillets (KMI010041A)
- Chicken - Fzn Imor Fillets (skinless) (KMI018005)
- Frozen Chips (KMI021000)

- Select the requested item from the search suggestions and MX will then show you the search results for where this item is located.



The screenshot shows the search interface with the selected item 'Chicken -mt Zinger Fillet (KMI' in the search field. Below the field, the location 'Food' is displayed with a green circle containing the number '6'.

- By selecting the location, that specific item will appear in the main panel for counting

Food						
Location	Description (Code)	Outer	Inner	Base Unit	Counted	
Freezer	Chicken -mt Zinger Fillet (KMI010031A)			<input type="text"/>	<input type="checkbox"/>	
				Each		

- To return to the count, select the **X** on the search field and the count will appear again.



Daily Count

A daily count means counting a small amount of inventory on a specific day without having to do an entire manual stock-take.

To complete the Daily count, you follow the same steps as the spot count.

Weekly Count

It is the process of continually validating the accuracy of the inventory in your system by regularly counting a portion of your inventory, on a **weekly** basis, so that every item in your inventory is counted at least several times a month.

To complete the Weekly count, you follow the same steps as the Daily Count.

Travel Path

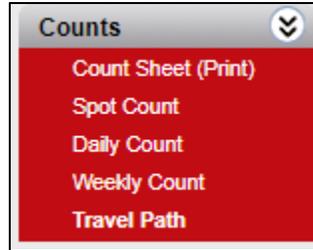
Travel Path is to rearrange or sort the items on your Macromatix Inventory Report.

The key process for Travel Path.

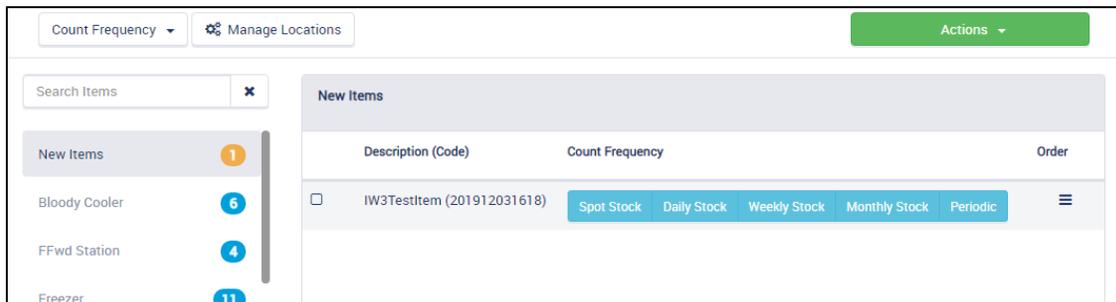
The MacromatiX Travel Path allows a Manager to specify where items are in the store. If an item's physical location is changed in the store, it can easily be moved in Macromatix. When counting stock, following this Travel Path will allow the count to be faster and more accurate.

How to manage the Travel Path

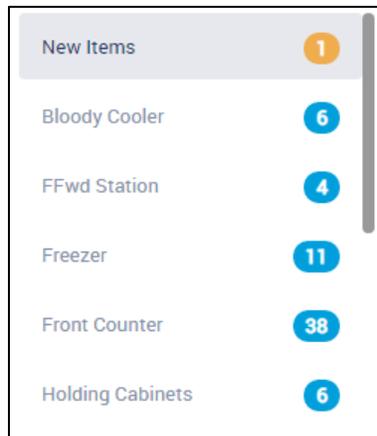
- Select the Menu Tab. Choose the 'Counts' category and then select the 'Travel Path' task.



- The mobile MX site will load on the screen



- A list of locations will appear on the left panel.



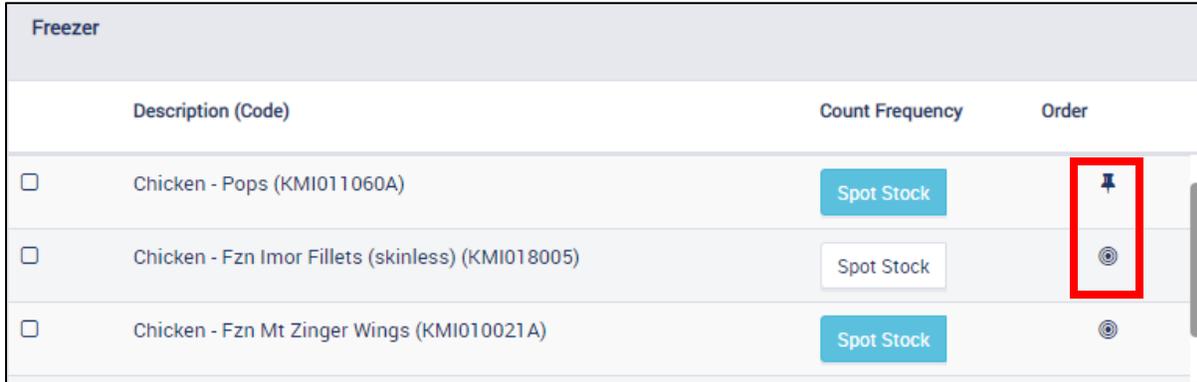
- Click on a location, Inventory items stored in this location will appear on the main screen.



The actions below can be applied to the Travel Path

1. How to move the order of an item:

- Click on the striped circle on the right of the item
- This will make a **pin icon** appear on this item and a target icon
- **Target icon** appears on all other items.



To move the item with the pin icon up or down the list, click on another item’s circle target icon and it will drop the item in the list under this item.

2. How to change the frequency an item is counted:

Click on the frequently used categories, user may change how often that item is listed to be counted.

- Select it once and turn the frequency category to be shaded blue the item will now be included in that count frequency.
- If selected again, it will remove the blue shade and will not be included in that count frequency.

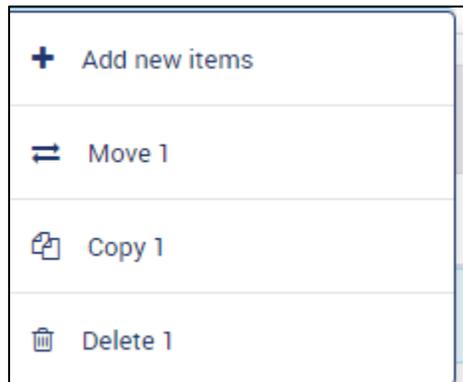


How to move or copy an item to a different location:

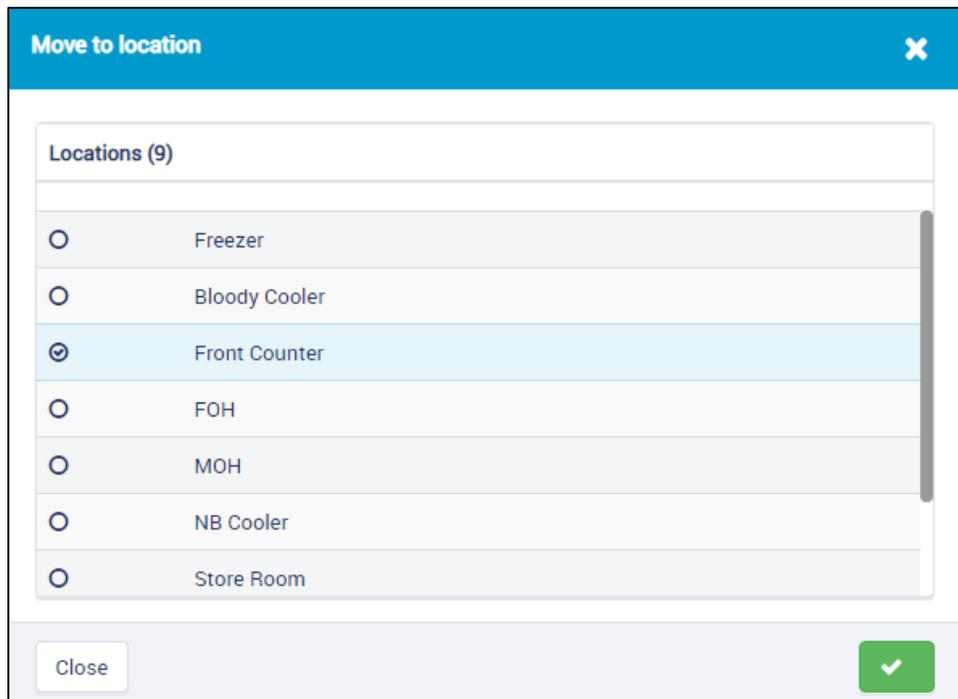
- Select the item to move by ticking the box on the far left of the inventory item name – it will turn light blue.



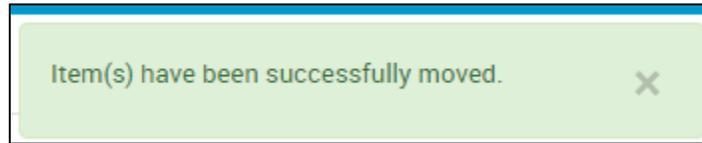
- Click the Action button and the 'Move' and 'Copy' options will show the number of inventory items you have selected. Choose an option to action.



- If the item is to be Moved or Copied, a pop-up box will appear for you to select the location you are sending the items to. Choose a location then click on a tick

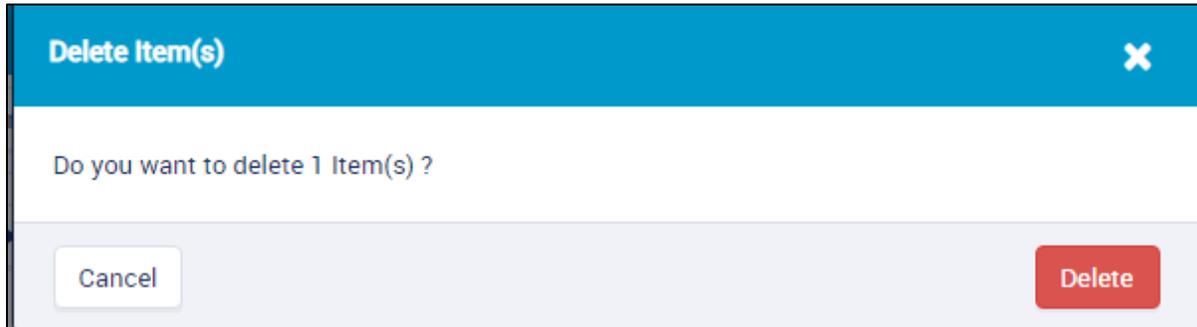


- A confirmation pop-up will appear



How to delete an inventory item from your Travel Path:

- select the item by ticking the box on the far-left side of the item.
- From the Actions button, select 'Delete' and a pop-up box will appear for you to confirm the Delete action.



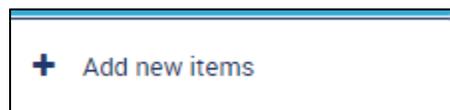
- A confirmation pop-up will appear



How to add an inventory item that hasn't been included:

Select the location where the new item will be added to, then from the Actions button,

- Select Add new items



- A pop-up box will appear for you to enter the key word for the item and click 'Search'.

Add new items ✕

Search for items 🔍 Search

Cancel

- From the search results, choose the item to be added then select **Add Item**

pop 🔍 Search

Chicken - Pops (KMI011060A)

Pops Carton - Large (KMI055049)

Pops Carton - Small (KMI055048)

Sprinkle Pops Cups (KMI055045)

Sprinkle Pops Lids (KMI055046)

Cancel Add item(s) 1