



Assign Storage Location and Bins

Background: You can use this feature to assign storage locations and bins for any item you want to count in inventory. This establishes your Inventory Tally report so you will have shelf-to-sheet inventory.

To Do and Notice:

1. Navigate to **Cycle Menu Planning** and select **Create Shopping List from Menu**.

Notice: This list will take you to all ingredients that are used in the menu. If you serve more than one menu, please repeat the following steps for each of the menus:

2. Select the desired **Menu Cycle**.
3. Choose what you wish to include:
 - 1) Start Day
 - 2) Number of Days

- 3) Meal
- 4) Click **Go**

Notice: Details for each Item will be displayed, including Primary Storage Location and Bin.

4. Click on the Item for which you wish to add Storage Location and/or Bin.
5. Click on the **Inventory** tab.
6. Click on the **Inventory Bins** sub-tab.
7. Select the **Unit Name** from the drop-down list.

Notice: The Unit Name should be the owner of the inventory.
8. Click on the **Add** button on the right-hand side of the screen.
9. Select the **Storage Area** from the drop-down list.

Notice: Ensure that you have established the storage area in Settings > Inventory and Issuing Settings.
10. Enter the Bin ID in the **Bin** box – e.g., Shelf A100, Shelf A110.

Notice: The Bin field is alphanumeric.

11. Select the **Stock Unit** from the drop-down list.

Notice: You may count an item in multiple units – e.g., Items can be counted by the case and/or by individual can.

12. Type an entry in the **Cycle** column, if you take inventory using count cycles.

Notice: If you have more than one location listed, designate one of the rows as the most common way you take inventory by selecting the **Primary** radio button in that row.

13. If you count the item in more than one way, repeat steps 8 - 12 until you have entered all applicable locations.

14. Click **Save** in the upper right-hand corner.

Notice: You can also access the Location and Bins by navigating to Item Maintenance > Edit Items and Recipes, then follow steps 5 - 12.

So What? You may assign multiple locations and/or multiple stock units to one item for ease of counting inventory.
