EZchef Getting Started Guide

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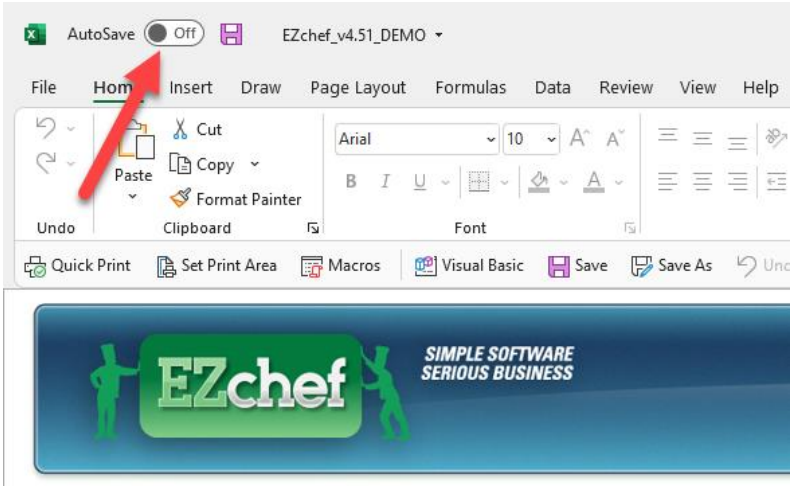
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Note to New EZchef Users:

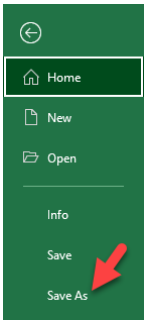
If you experience any system freezes, shutdowns or other unusual file behavior, it is likely due to the way your Excel (Office 365) is configured. Specifically, if the **AutoSave** feature is "**On**" then the program is likely being run from the "Cloud" version of the file stored on Microsoft Servers called "OneDrive", as opposed to from the "Local" version of the file stored in a "OneDrive" folder on your hard drive.

EZchef is not a standard Excel file with the extension **.xlsx**. It utilizes the Microsoft Programming Language (called VBA), and has the extension **.xlsm**. While saving the file to the Cloud is fine when you want to have a secure backup, to access it from more than one location, or if you need to share the file with another user; VBA files do not function properly when opened and run from the "cloud".

To ensure proper functionality simply turn off the **AutoSave** feature and the file will revert to the local version.



One way to confirm whether you are working with a local or cloud based version of the file is to select **File** and view the **Save** options. If it indicates **Save As** (below)**,** then you are working from a **local file** from your hard drive; if it reads **Save Copy** then the file is being accessed from the **cloud**.



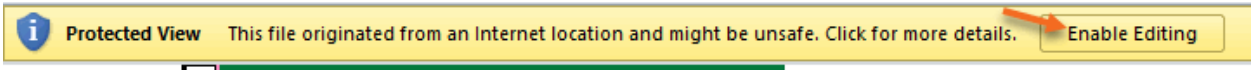
Opening EZchef for the first time

You have most likely received the EZchef file by downloading directly from the web site after purchasing, or by clicking on a download link sent by email after the sale is complete. Either way you should **SAVE** the file to your hard drive (e.g. your computer Desktop) prior to opening for the first time.

Excel files from the Internet and from other potentially unsafe locations can contain viruses or other kinds of malware that can harm your computer. To help protect your computer, files from these potentially unsafe locations are initially opened in Protected View (does not apply to Excel 2007).

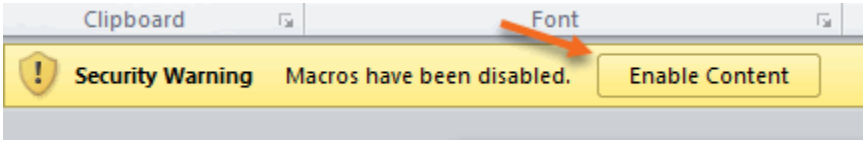
Enable Editing & Enable Content

The first time you open the file you will see the **Protected View** message bar at the top of the page. Simply click on the "**Enable Editing**" button to proceed.



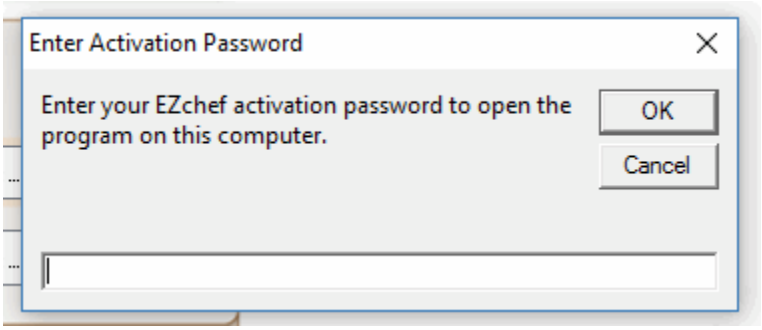
Refer to this link for more details.

Another message bar will then appear. This **Security Warning** message will indicate that the **Macros** (the programming code) have been disabled, and you will need to select the "**Enable Content**" button to continue.



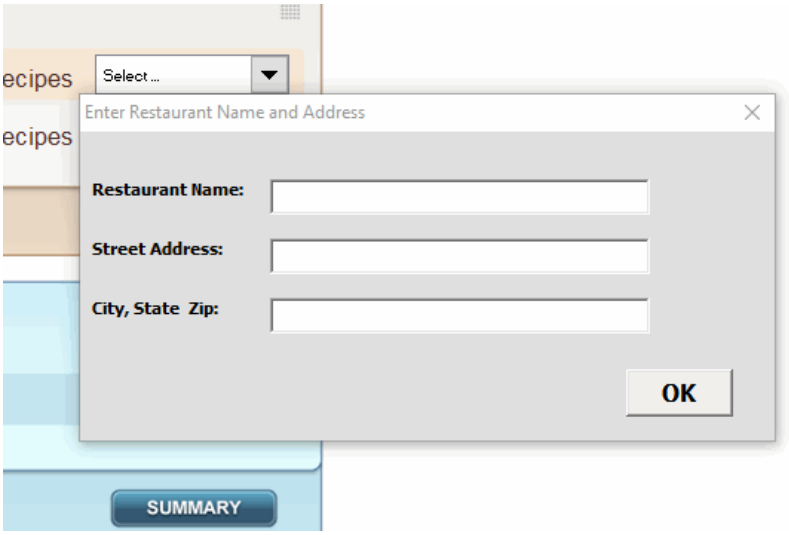
Input the Activation Password

EZchef will now open, and you will be prompted to input the EZchef **activation password.** The password will be emailed to you after the purchase is complete. This is a one-time step so long as the file remains on the same computer. If you move the file to another computer, you will be prompted to input the activation password again, so **save the password** for future reference.



Input the Restaurant Name and Address

Finally, a form will open that will prompt you to enter the restaurant (or company) name and address. Click **OK** when you are done. The program is now ready to go!



Step by Step Setup

What to do first? (Perform in this sequence)

1. ***Define Inventory Categories & Locations, and Menu Categories***
2. ***Import or Manually Enter Inventory Items***
3. ***Assign Recipe Units & Conversions, Yield Factors (For Menu Costing)***
4. ***Assign Par Levels, Count Units, Conversions and Locations (For Inventory Counting)***

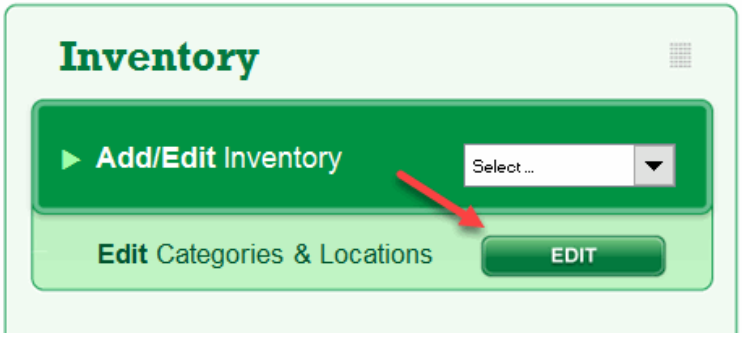
Define Inventory Categories & Locations, and Menu Categories

EZchef includes 12 inventory categories (plus a "Food in Process" category to be used only when taking inventory), 15 inventory locations where you store your products, and 10 menu categories.

All categories and locations are user defined (except for the supported distributor versions of the program where 8 of the 12 inventory categories are locked in order to permit compatibility with the import of products from the distributor order guides).

Note: the program also includes a Sub Recipes section with 400 templates.

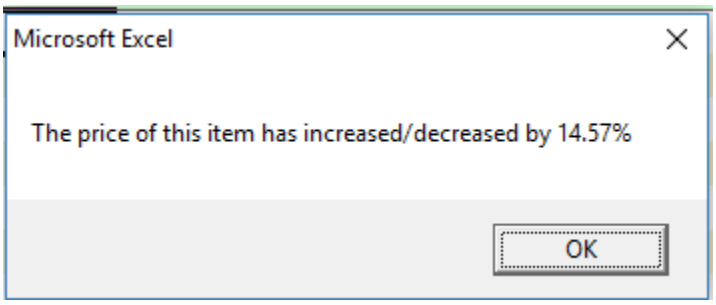
To access the categories and locations list click the "**Edit Categories and Locations**" button from the EZchef Main Menu.



All categories and locations will be visible from this screen (see below). Make any changes you wish to the **Inventory Categories**, and then click the "**Apply Names**" button. Repeat to edit the **Menu Categories** and click "**Apply Names**". Finally, edit the **Inventory Locations** to reflect the Locations where you store your inventory items. Locations are only used if you will take your period end physical inventory counts by Location rather than by Category. This will be discussed in a later section. After editing the Locations click on the "**Main Menu"** button to return to that page view.



Note: there is also an "**Inventory Item Price Change Alert"** with a default setting of 10%. Any time you manually update an item's price; and the new price has increased or decreased by 10% or more, a message will display indicating the percentage increase or decrease. Edit this setting to any percentage you like.



Import or Manually Enter Inventory Items

Now it's time to enter your inventory items. You have three options:

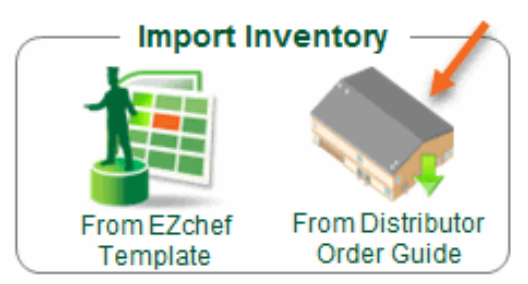
1) **Import directly** from an order guide from one of our supported distributors (only for purchasers of a specific "Distributor Version" of the program), or

2) **Copy and Paste** items from your own excel spreadsheets (or those obtained from your other distributors) into a custom template that you can export directly from EZchef, or

3) **Enter your inventory items manually**.

Direct Import from Supported Distributor

If you purchased a version of EZchef that supports the direct import of a distributor's order guide, then follow the directions in the EZchef **HELP** section to request your order guide in the correct format, or to export it directly from the distributor's web site. After exporting or receiving your order guide file you can import it into the program by selecting the "**From Distributor Order Guide**" icon on the **Main Menu**.



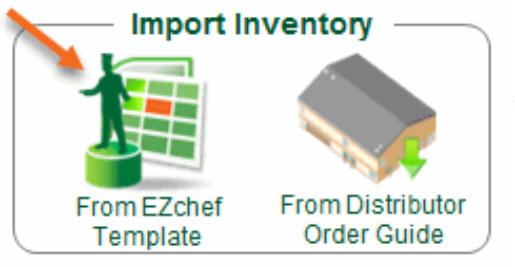
Note: Imported inventory will include only the following data: **Item Name** and **Category**, **Item Code, Brand, Pack #/Size** (this is the "As Purchased" unit or the way the items are delivered to you), and finally the associated **Pack Price**.

Recipe units and **Inventory Count Units** are not included when you import your order guide. These items are "user defined" and you will therefore enter them when completing the setup process; and before you begin your menu costing or take your first inventory.

Even if you have purchased a Distributor version of EZchef it's likely that you use other vendor's products as well. These can be imported using the **EZchef Template** or manually entered.

Import from EZchef Template

From the lower right corner of the EZchef **Main Menu**, click on the **"From EZchef Template"** icon as shown below, and then select the "**Create Template**" button.

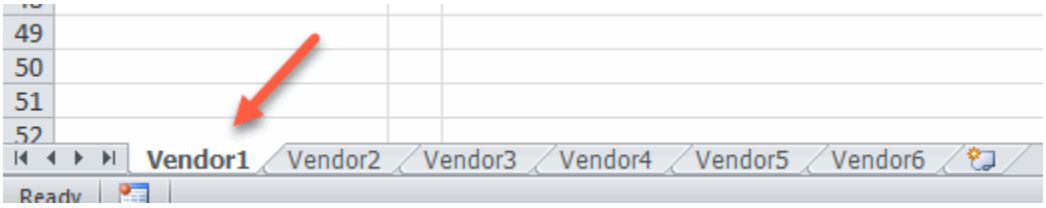




EZchef will create a new Excel workbook (template), with **six** identical worksheets as shown below. Use one or more worksheets for each Vendor whose products you plan to import using this method.

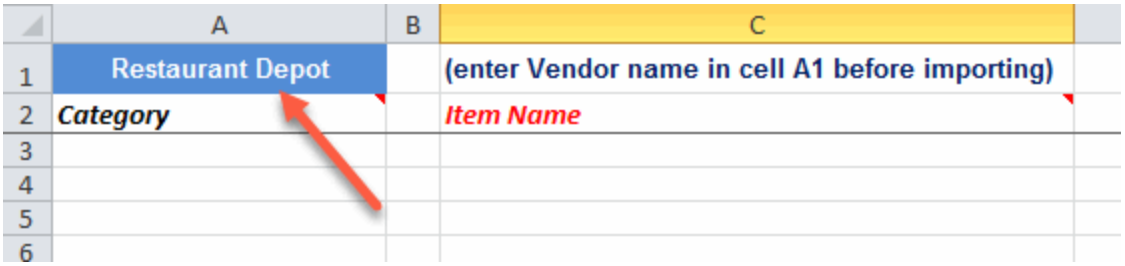
Note: Do not add additional worksheets to this workbook or delete any of the existing worksheets. Instead, export a new Template if you need additional sheets for more than six vendors.



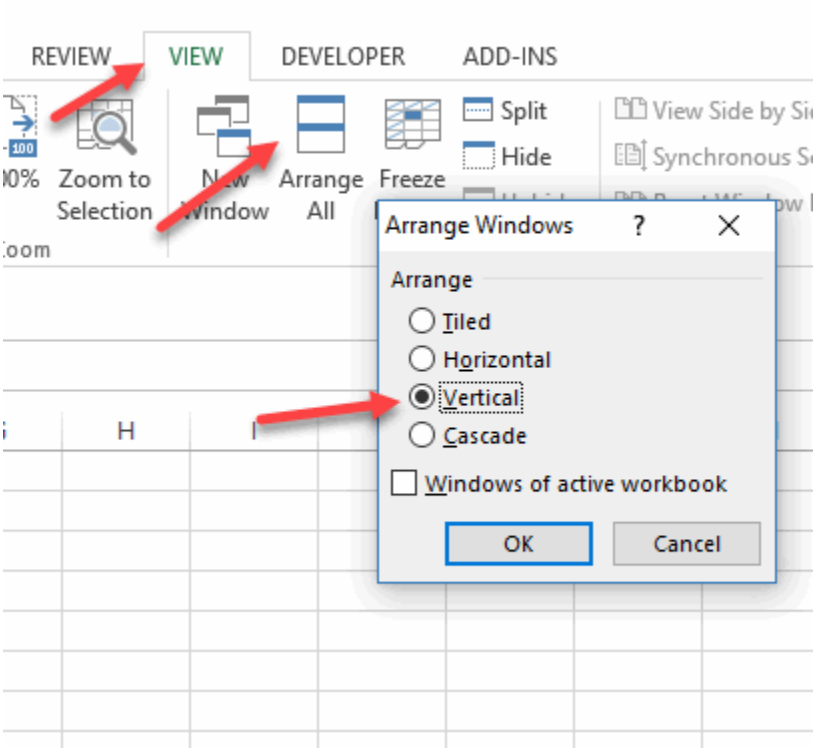


After saving the new template file, close the EZchef program, and open the new workbook.

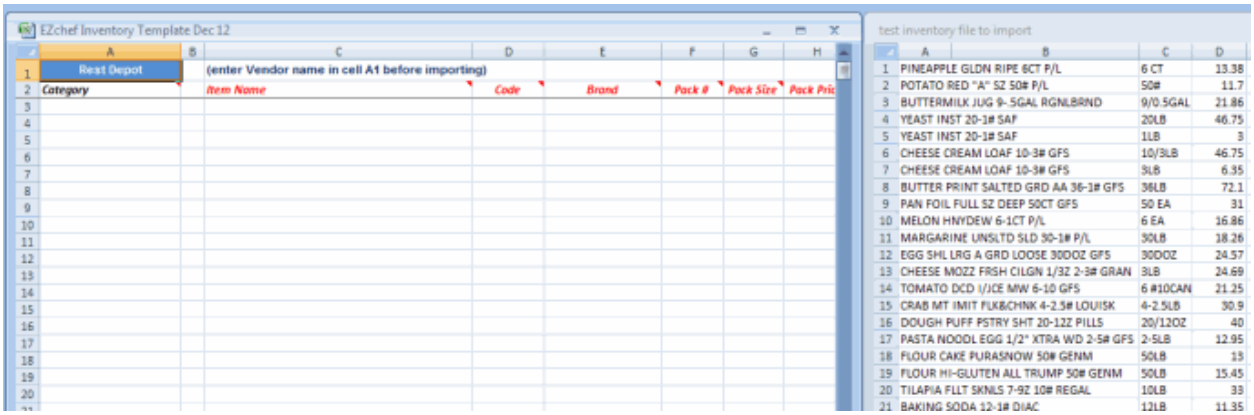
First enter the **Vendor's Name** (in the Blue colored cell A1). Limit the Name entry to 12 characters for best results.



Now, from the same Excel window, open the file that you will to use to copy your existing data. To view both worksheets side by side, use the **"VIEW...Arrange All"** feature of Excel and select the "**Vertical**" button as shown below.



This will result in both spreadsheets being displayed **side by side** as shown below.



Now you can **Copy (CTR+C)** and **Paste (CTR+V)** your existing data, **column by column**, to the empty template.

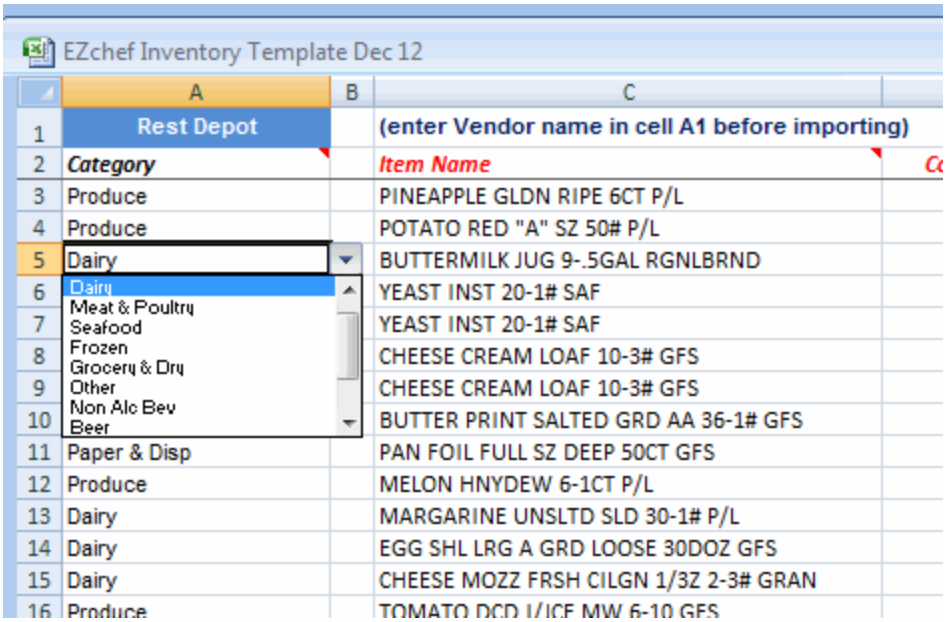
For example, Inventory item names from your existing spreadsheet are pasted in Column C of the template with the heading "Item Name". If the item's Pack# and Pack Size are combined in a single column on your current spreadsheet (e.g. 4/ gal or 10/2 lb.), then paste that column into Column G of the template as shown below (the Pack Size column). In this case leave the Pack # (Column F) empty!

EZchef Inventory Template Dec 12

	A	B	C	D	E	F	G	H
1	Rest Depot		(enter Vendor name in cell A1 before importing)					
2	Category		Item Name	Code	Brand	Pack #	Pack Size	Pack Price
3			PINEAPPLE GLDN RIPE 6CT P/L				6 CT	13.38
4			POTATO RED "A" SZ 50# P/L				50#	11.7
5			BUTTERMILK JUG 9-.5GAL RGNLBRND				9/0.5GAL	21.86
6			YEAST INST 20-1# SAF				20LB	46.75
7			YEAST INST 20-1# SAF				1LB	3
8			CHEESE CREAM LOAF 10-3# GFS				10/3LB	46.75
9			CHEESE CREAM LOAF 10-3# GFS				3LB	6.35
10			BUTTER PRINT SALTED GRD AA 36-1# GFS				36LB	72.1
11			PAN FOIL FULL SZ DEEP 50CT GFS				50 EA	31
12			MELON HNYDEW 6-1CT P/L				6 EA	16.86
13			MARGARINE UNSLTD SLD 30-1# P/L				30LB	18.26
14			EGG SHL LRG A GRD LOOSE 30DOZ GFS				30DOZ	24.57
15			CHEESE MOZZ FRSH CILGN 1/3Z 2-3# GRAN				3LB	24.69
16			TOMATO DCD I/JCE MW 6-10 GFS				6 #10CANS	21.25
17			CRAB MT IMIT FLK&CHNK 4-2.5# LOUISK				4-2.5LB	30.9
18			DOUGH PUFF PSTRY SHT 20-12Z PILLS				20/12OZ	40
19			PASTA NOODL EGG 1/2" XTRA WD 2-5# GFS				2-5LB	12.95

The item's Code (Column D) and Brand (Column E) are optional.

Then select each item's EZchef inventory category from the drop down list in Column A. These inventory categories are included in the export file you created to begin this procedure. To save time you can copy and paste the Category names down the column rather than selecting each one from the drop down list.

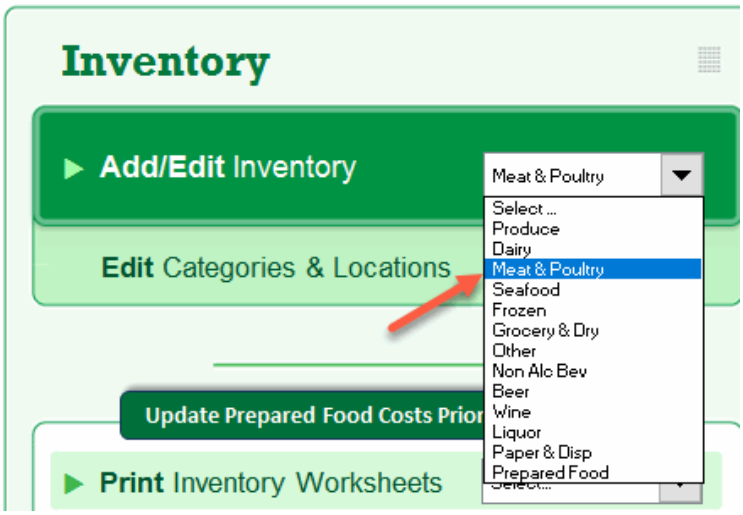


When done, save the Template file with the current date (e.g. EZchef Inventory Template_ Date). Now you can import the inventory data in the template directly into EZchef by selecting the **Import from Template** button from the same screen where you exported the Template.

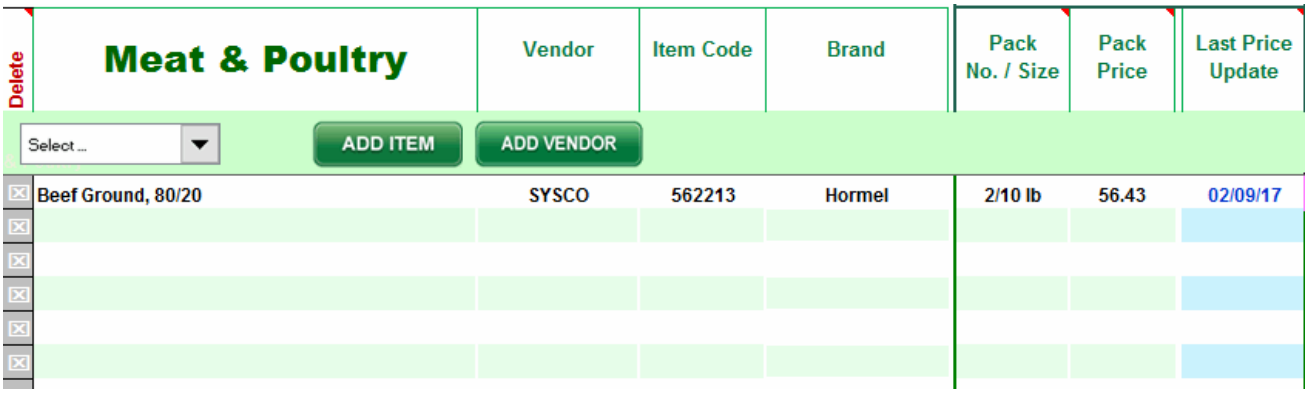
Note: Similar to the supported distributor versions of EZchef, you will still need to assign **Recipe Units** and **Inventory Count Units** for each item. We'll cover this now.

Enter Inventory Manually

To manually enter inventory items begin by selecting the appropriate inventory category from the **Add/Edit Inventory** drop down list.



From the inventory sheet you can either select the "**ADD ITEM**" button or scroll down to the first empty row.



Enter the following information as you Tab across the row. Screen shots of examples will be displayed at the end of this section.

- **Item Name**

- **Vendor:** Use the drop down arrow to select the Vendor's name. Do not enter the name manually. For a new Vendor use the "**ADD VENDOR**" button to add it to the list

- **Item Code** (optional)

- **Brand** (optional)

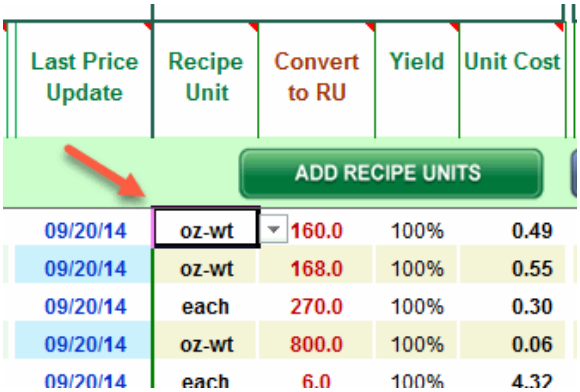
- **Pack No. /Size**: The way the item is purchased. Do not worry about the format; you can enter this information any way you like.

- **Pack Price:** The price based on the way the item is purchased (e.g. the Pack No. /Size). Each time a Pack Price is either entered or updated, the date will be displayed in the Last Price Update column.

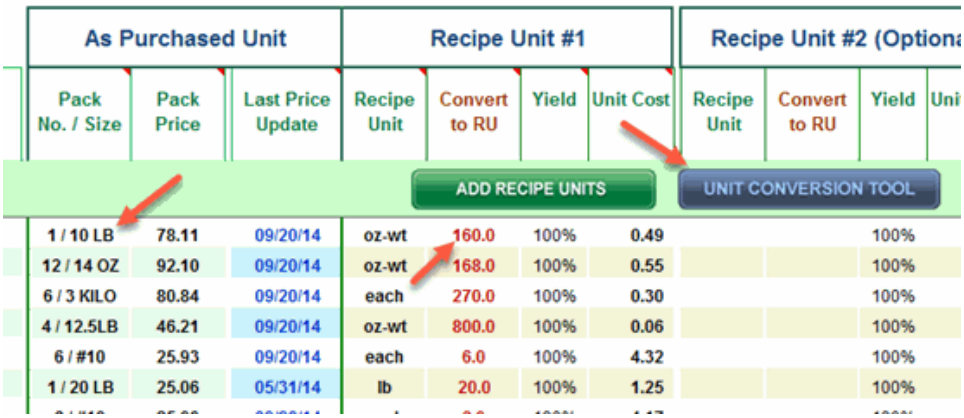
Assign Recipe Units, Conversions and Yields

The next group of items to input will also need to be entered for inventory directly imported from supported distributor order guides, and for items imported using the EZchef Template.

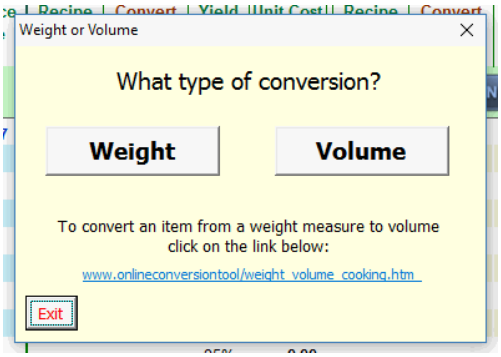
Recipe Unit #1: This is the way you will call for the item in your recipes. Select the Recipe Unit from the drop down list of available units. Use the "**ADD RECIPE UNITS**" button to add a new unit.



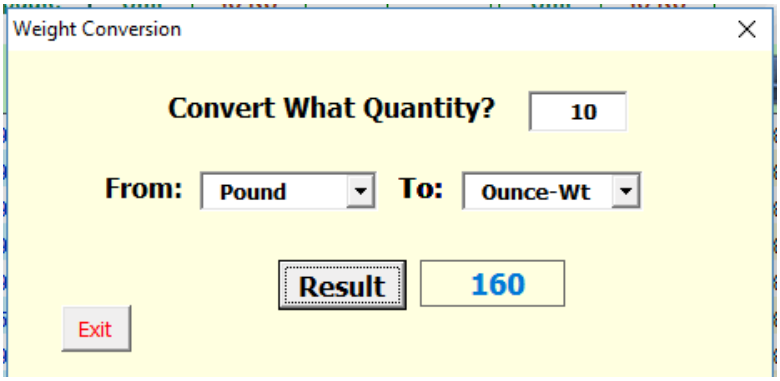
Convert to RU: Enter a number that converts the **As Purchased Pack #/Size** to the corresponding **Recipe Unit (RU).** Ask how many Recipe Units are in the Pack No. /Size. If the Pack # /Size is 1/10 lbs., and the recipe unit is oz-wt, then ask how many ounces are in 10 lbs. (e.g. 160). That is the "Convert to RU" number. It converts the Pack Price to the Recipe Unit cost. Use the "**UNIT CONVERSION TOOL**" to assist with the calculation.



To convert a weight measure to a volume measure (e.g. 5 lb. bag of sugar to cups), use the link provided at the bottom of the form shown below.



http://www.onlineconversion.com/weight_volume_cooking.htm



Yield: **T**he default is set to 100% but you can edit the default to account for product shrinkage due to trimming or cooking (e.g. edit 100% to 70 %.)

Recipe Unit #2: (optional) If you input a second recipe unit, the program will prompt you to select which one you want to use when linking the item to a Menu Item or Sub Recipe.

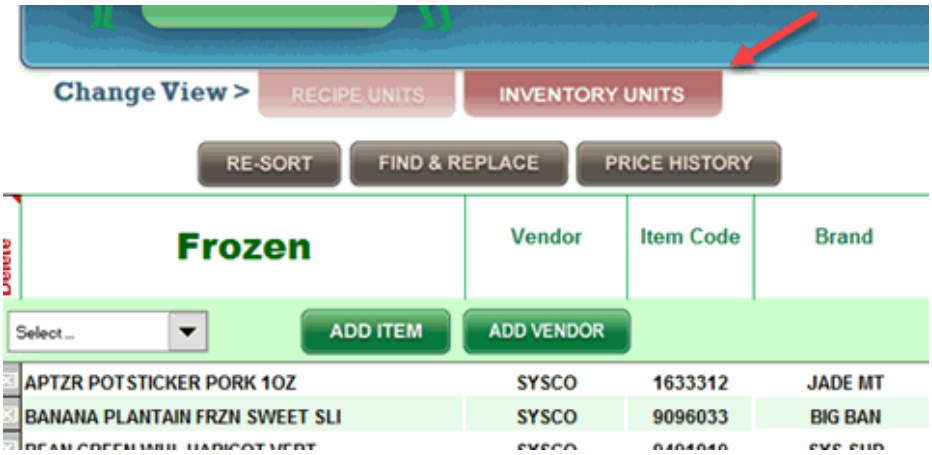
EXAMPLES including Recipe Units:

As Purchased Unit			Recipe Unit #1				Recipe Unit #2 (Optional)			
Pack No. / Size	Pack Price	Last Price Update	Recipe Unit	Convert to RU	Yield	Unit Cost	Recipe Unit	Convert to RU	Yield	Unit Cost
			ADD RECIPE UNITS				UNIT CONVERSION TOOL			
8 / 2# TUB	57.34	09/20/14	oz-wt	256.0	100%	0.22			100%	0.00
48 / 1.5 OZ	37.94	09/20/14	each	48.0	100%	0.79			100%	0.00
1 / 1 LB	5.89	09/20/14	oz-wt	16.0	50%	0.74			100%	0.00
4 / 3 LB	24.17	09/20/14	oz-wt	192.0	100%	0.13			100%	0.00
1 / 50 LB	25.00	04/30/16	oz-wt	800.0	82%	0.04	lb	50.0	100%	0.50
1 / 36 CT	36.73	09/20/14	each	36.0	75%	1.36			100%	0.00
1 / 4 OZ	6.38	09/20/14	oz-wt	4.0	100%	1.60			100%	0.00
1 / 50-55#	21.00	09/20/14	oz-wt	832.0	95%	0.03			100%	0.00
1 / 4 OZ	6.51	09/20/14	oz-wt	4.0	80%	2.03			100%	0.00
1 / 5 LB	15.50	09/20/14	oz-wt	80.0	98%	0.20			100%	0.00
50#	20.00	07/28/14	oz-wt	800.0	82%	0.03			100%	0.00

As Purchased Unit			Recipe Unit #1				Recipe Unit #2 (Optional)			
Pack No. / Size	Pack Price	Last Price Update	Recipe Unit	Convert to RU	Yield	Unit Cost	Recipe Unit	Convert to RU	Yield	Unit Cost
			ADD RECIPE UNITS				UNIT CONVERSION TOOL			
120 /2OZ	49.18	03/08/14	each	120.0	100%	0.41	oz-wt	240.0	100%	0.20
4 / 6 LB	31.16	09/20/14	each	192.0	100%	0.16			100%	0.00
12 / 2 LB	42.96	09/20/14	oz-wt	384.0	100%	0.11	lb	24.0	100%	1.79
4 / 8#	94.67	09/20/14	oz-fl	512.0	100%	0.18	lb	32.0	100%	2.96
180/case	34.00	07/14/12	each	180.0	100%	0.19			100%	0.00
12 PACK	4.50	07/14/12	each	12.0	100%	0.38			100%	0.00
20 / 28"	30.05	09/20/14	each	20.0	100%	1.50	slice	84.0	100%	0.36
6 / 33 OZ	29.12	05/31/14	each	6.0	100%	4.85	slice	72.0	100%	0.40
5 / 24 CT	31.23	09/20/14	each	120.0	100%	0.26			100%	0.00
8 / 38 OZ	36.55	06/26/14	each	8.0	100%	4.57			100%	0.00

Assign Par Levels, Count Units, Conversions, Yields and Locations

Click the I**NVENTORY UNITS** button to "toggle" to that view for entering your Count Units.



Par Level: Add an optional Par level to appear in your printed Vendor Order Guides. Including Par Levels allows you to compare to the actual On Hand amount so you can order only what you need. Enter in any format you like. You can add both a high and low par level if the order level depends on the day of week (e.g. early week vs. weekend.)

Count Unit: The unit that you will use to count your inventory items when taking end of period or end of month inventory. It may be the same or different than the As Purchased Unit. The choice is up to you how you want to count each item.

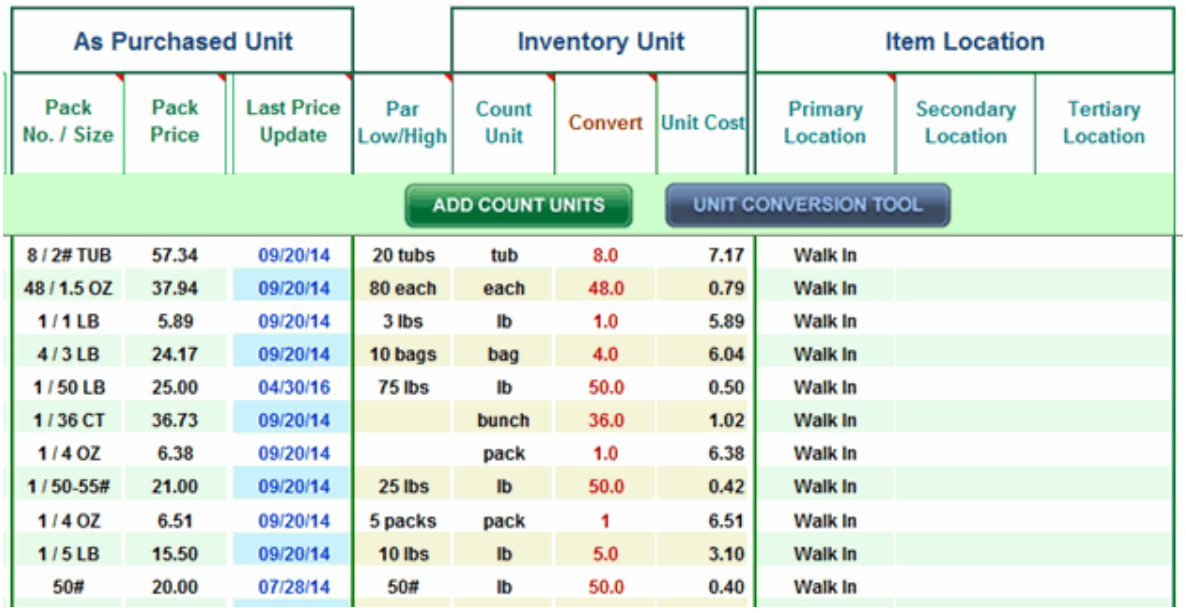
Convert to CU: Enter a numerical value to convert the Pack Price to the Inventory Count Unit cost. Ask how many Count Units are there in the Pack No./Size. For example, if you purchase Whole Milk by the case (4 gallons) but you want to count by the gallon, then the Convert number is "4".

Locations: EZchef offers two options for counting inventory; by Category or by Location. Either way, the program summarizes the total values **by Category.** For many users it is easier and more efficient to perform the counts **by Location**. If

you plan on counting **by Category** then there is no need to assign **Locations**.

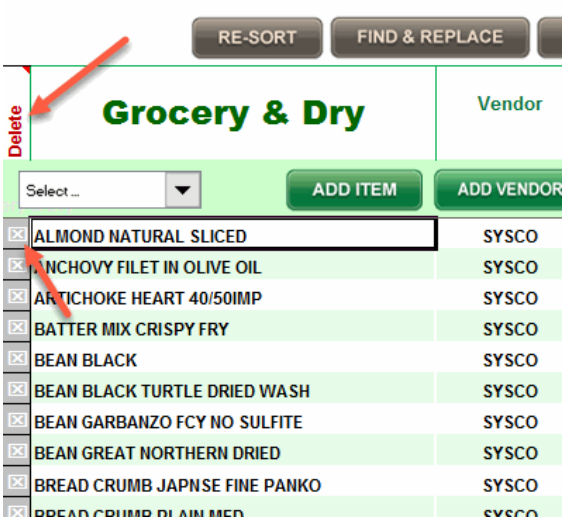
Primary Location *(use the drop down list to select the Location where the majority of the item is stored)*
Secondary Location *(optional)*
Tertiary Location *(optional)*

EXAMPLES including Count Units and Locations:



As Purchased Unit				Inventory Unit			Item Location		
Pack No. / Size	Pack Price	Last Price Update	Par Low/High	Count Unit	Convert	Unit Cost	Primary Location	Secondary Location	Tertiary Location
			ADD COUNT UNITS		UNIT CONVERSION TOOL				
8 / 2# TUB	57.34	09/20/14	20 tubs	tub	8.0	7.17	Walk In		
48 / 1.5 OZ	37.94	09/20/14	80 each	each	48.0	0.79	Walk In		
1 / 1 LB	5.89	09/20/14	3 lbs	lb	1.0	5.89	Walk In		
4 / 3 LB	24.17	09/20/14	10 bags	bag	4.0	6.04	Walk In		
1 / 50 LB	25.00	04/30/16	75 lbs	lb	50.0	0.50	Walk In		
1 / 36 CT	36.73	09/20/14		bunch	36.0	1.02	Walk In		
1 / 4 OZ	6.38	09/20/14		pack	1.0	6.38	Walk In		
1 / 50-55#	21.00	09/20/14	25 lbs	lb	50.0	0.42	Walk In		
1 / 4 OZ	6.51	09/20/14	5 packs	pack	1	6.51	Walk In		
1 / 5 LB	15.50	09/20/14	10 lbs	lb	5.0	3.10	Walk In		
50#	20.00	07/28/14	50#	lb	50.0	0.40	Walk In		

Delete an Item: To delete an inventory item double click on the **"X"** to the left of the item name. If the item has been previously linked to a menu item or sub recipe you will have the option to Cancel or Continue. If you select Continue the item will be removed from every menu item and sub recipe.



Create Sub Recipes

Now that your inventory items have been entered you are ready to create your Menu Items and Sub Recipes. You should begin with Sub Recipes as they are used as “building blocks” or components for many of your Menu Items as well as for other Sub Recipes.

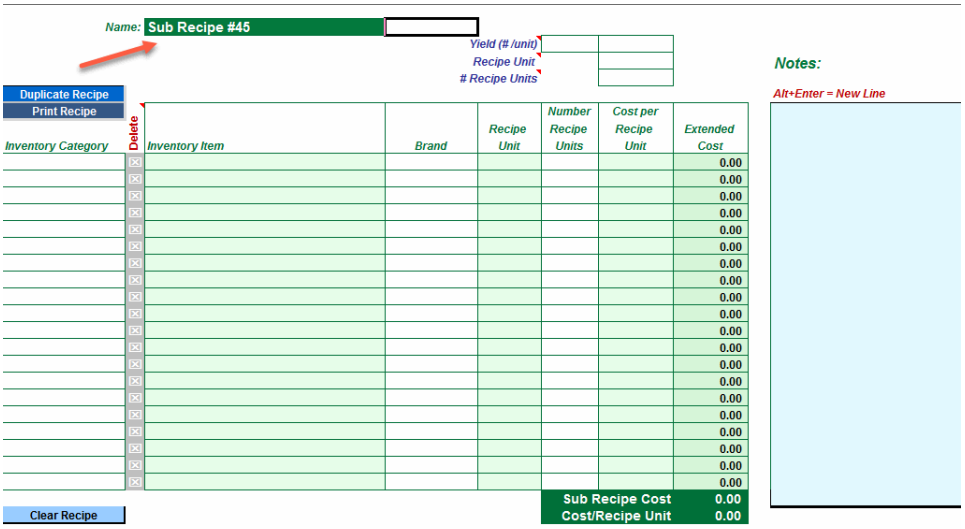
As an example, if you sell 10 varieties of Pizza in your restaurant, you would first create a Sub Recipe for the Pizza dough (e.g. 12 inch dough), and then link that as an ingredient to all the Pizza Menu Items, rather than having to recreate the dough recipe each time you “build” a different type of Pizza.

EZchef includes **400** Sub Recipe Templates for you to use.

To create a new Sub Recipe, select Sub Recipes from the drop down box to the right of **Add Menu Items and Sub Recipes**.



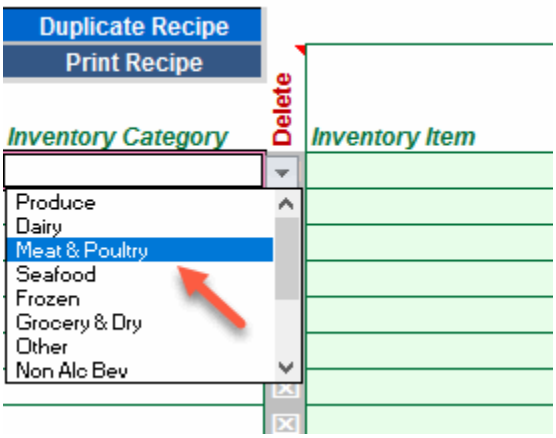
A new Sub Recipe template will be displayed as shown below.



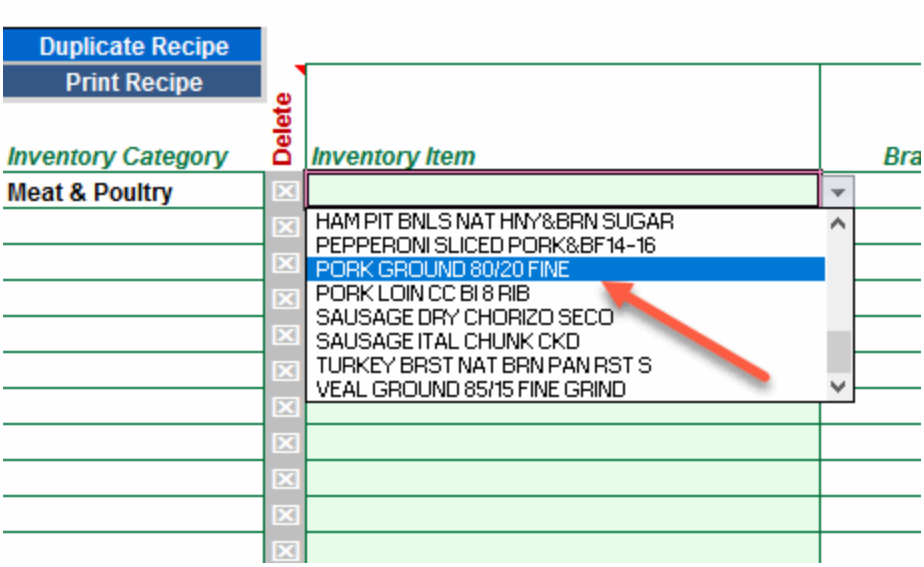
Note that the default name will be "**Sub Recipe #**" followed by a number (ranging from **1-400**). "Over-write" (e.g. edit) the name in the Dark Green cell to reflect the name of your new Sub Recipe.

Now you can build your Sub Recipe step-by-step:

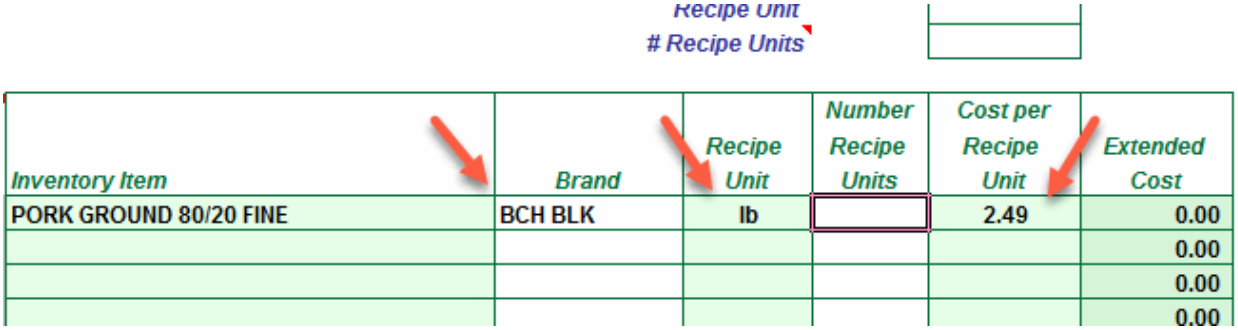
- Start with the first row and select the drop down arrow under the Inventory Category column. Select the items Category (e.g. Meat & Poultry).



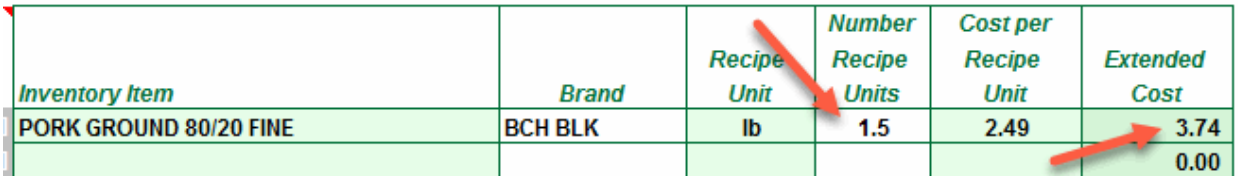
- Move or Tab across the row, first selecting the item name from the alphabetically list of Meat & Poultry items in the Inventory Item drop down list (e.g. Pork Ground 80/20 Fine).



- The item's **Brand**, **Recipe Unit** and **Recipe Unit cost** will be automatically linked based on the information you previously entered when adding your Inventory items.



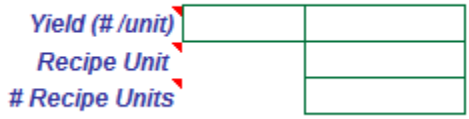
- Manually enter the **Number of Recipe Units** for the specific Menu Item you are creating. The Extended cost for that item will be displayed.



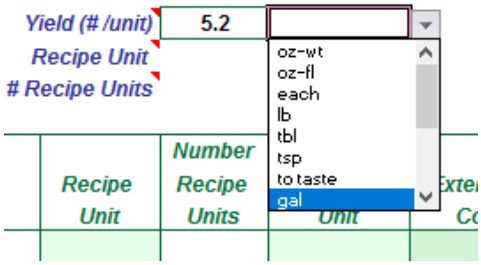
- Continue this process for each Inventory item (or Sub Recipe) to be included.

- You can document the preparation of the Sub Recipe using the **"Notes:"** box to the right of the Template.

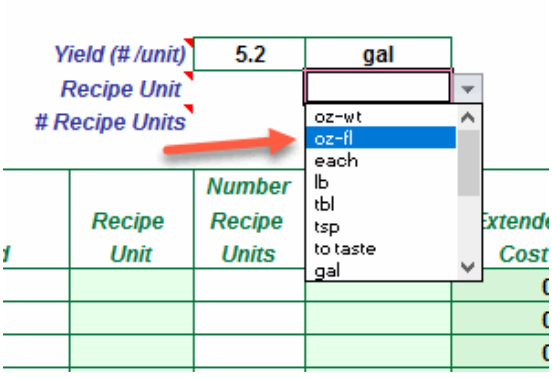
- When you are done you will need to enter the **Yield** and **Recipe Unit** information. <u>This section must be filled out in order to link the Sub Recipe to Menu Items or other Sub Recipes!</u>



- Enter the **Yield #** and **Yield Unit** in the two adjacent cells. Use the drop down box to select the Unit. In the example below the Sub Recipe yielded 5.2 gallons (Yield # is 5.2, Yield Unit is Gallon). In this case you would need to wait till the Sub Recipe was completed to measure or weigh the batch.



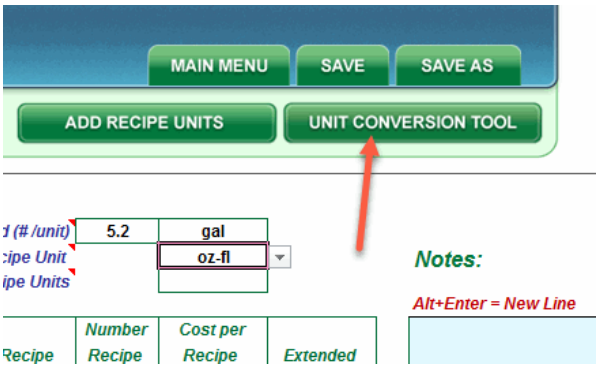
- Now select the **Recipe Unit** you will use when linking the Sub Recipe to your Menu Items. In this case the Yield Unit is Gallon but when linking to your Menu items you have chosen to use Fluid Ounces (oz-fl), a smaller, more manageable recipe unit than gallon.



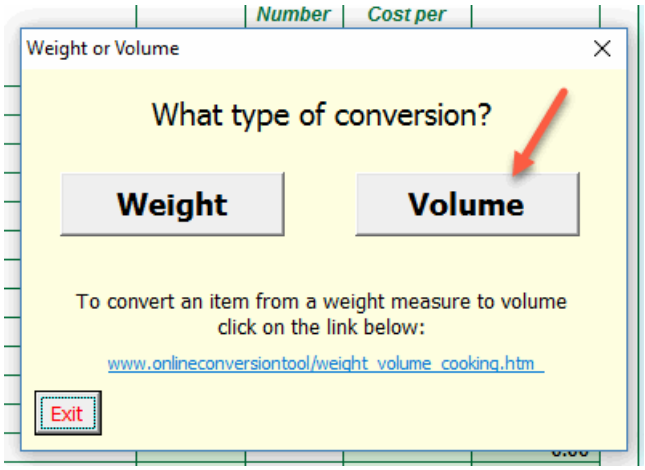
- Finally you need to convert the Yield total to the corresponding number of Recipe Units in order for the program to determine the cost per recipe unit

(displayed at the bottom of the Template along with the total Sub Recipe Cost). In this case how many fluid ounces are there in 5.2 gallons?

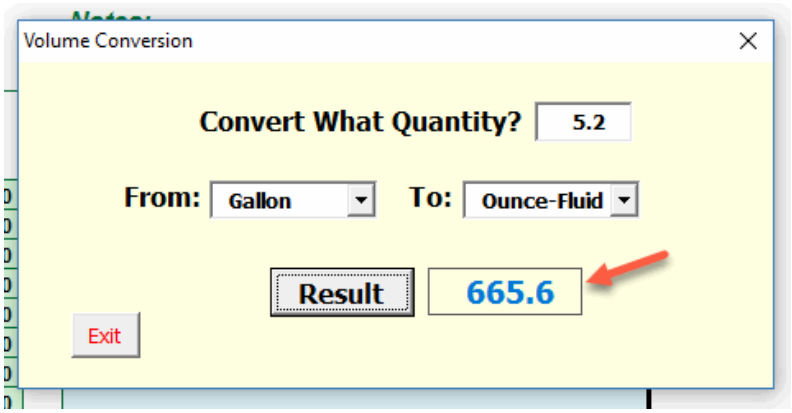
- Use the "**UNIT CONVERSION TOOL**" to assist in the calculation as demonstrated below



- First select the Conversion type, in this case Volume



- Now select Yield quantity and unit to convert, in this case" 5.2" and "Gallon". Then select the Recipe Unit from the "To:" drop down box. In this case select "Ounce-Fluid". Finally select the Result button to show how many Fluid Ounces are in 5.2 Gallons (e.g. the answer is 665.6 oz-fl).



- Exit the Conversion Tool and enter this number in the remaining cell

Yield (# /unit)	5.2	gal
Recipe Unit		oz-fl
# Recipe Units		665.6

A fully completed template would look like the one displayed below. Note that once the Recipe Unit information for the batch is input, the Template will display the Cost per Recipe Unit at the bottom of the template.

Name: Marinara Sauce

Yield (# /unit)	5.0	gal
Recipe Unit		oz-fl
# Recipe Units		640.0

Duplicate Recipe
Print Recipe

Inventory Category	Delete	*Inventory Item*	*Brand*	*Recipe Unit*	*Number Recipe Units*	*Cost per Recipe Unit*	*Extended Cost*
Produce	☒	ONION YELLOW JUMBO FRESH	SYS IMP	oz-wt	80	0.04	2.81
Produce	☒	GARLIC PEELED FRESH JAR (each)	SYS NAT	oz-wt	16	0.20	3.16
Grocery & Dry	☒	TOMATO CRSHD IN HVY JUICE ITLY	LASMARZ	each	2	4.59	9.17
Grocery & Dry	☒	TOMATO DICED IN JCE MW	SYS OTT	each	4	4.09	16.34
Produce	☒	BASIL FRESH	PACKER	oz-wt	4	0.74	2.95
Grocery & Dry	☒	SUGAR GRANULATED EXTRA FINE	SYS CLS	oz-wt	4	0.03	0.14
	☒						0.00
	☒						0.00
	☒						0.00
	☒						0.00
	☒						0.00
	☒						0.00
	☒						0.00
	☒						0.00
	☒						0.00
	☒						0.00
	☒						0.00
	☒						0.00
	☒						0.00
					Sub Recipe Cost		34.57
					Cost/Recipe Unit		0.05

Clear Recipe

Here is another example of a Sub Recipe for Crab Cakes where the Yield Unit is simply defined as “Batch” and the Recipe Unit as “each”. In other words this Sub Recipe produces a single Batch of 43 Crab Cakes at a cost of 3.13 each.

Name: **Crab Cakes**

Yield (# /unit)	1.0	batch
Recipe Unit		each
# Recipe Units		43.0

Duplicate Recipe
Print Recipe

Inventory Category	Delete	Inventory Item	Brand	Recipe Unit	Number Recipe Units	Cost per Recipe Unit	Extended Cost
Seafood	☒	CRAB MEAT SUPER LUMP	HRBRSEA	lb	6	21.67	130.01
Dairy	☒	EGG SHELL LARGE GR AA USDA WHT	WHLFCLS	each	6	0.13	0.78
Grocery & Dry	☒	MUSTARD DIJON W/WHT WINE TIN (each)	INTLIMP	oz-wt	1	0.13	0.13
Grocery & Dry	☒	SAUCE WORCESTERSHIRE (each)	LEA&PER	oz-fl	.5	0.11	0.05
Grocery & Dry	☒	SEASONING SEAFOOD (each)	OLD BAY	oz-wt		0.35	0.00
Grocery & Dry	☒	SPICE PEPPER BLK TABLE GRND ME	IMP/MCC	oz-wt		0.75	0.00
Grocery & Dry	☒	SALT KOSHER	DIACRYS	oz-wt		0.05	0.00
Grocery & Dry	☒	HORSERADISH WHITE PRPD (each)	AREZZIO	oz-wt	.5	0.14	0.07
Grocery & Dry	☒	BREAD CRUMB PLAIN MED	SYS CLS	oz-wt	2	0.07	0.15
Grocery & Dry	☒	CRACKER RITZ CRSHD	NABISCO	oz-wt	16	0.16	2.60
Grocery & Dry	☒	MAYONNAISE REAL PLAS	HELLMAN	oz-fl	6	0.12	0.74
	☒						0.00
	☒						0.00
	☒						0.00
	☒						0.00
	☒						0.00
	☒						0.00
	☒						0.00
	☒						0.00
	☒					Sub Recipe Cost	134.52
						Cost/Recipe Unit	3.13

Clear Recipe

Here is another example of a Sub Recipe for adding Lettuce, Tomato and a Pickle to a variety of sandwiches. You might create this Sub Recipe to make it easy to add this “Sandwich Set” to multiple Sandwich items without having to recreate it each time. In this case the Yield Unit and Recipe Unit are identical.

Name: LTP SANDWICH SET

Yield (# /unit)	1.0	each
Recipe Unit		each
# Recipe Units		1.0

Duplicate Recipe
Print Recipe

Inventory Category	Delete	Inventory Item	Brand	Recipe Unit	Number Recipe Units	Cost per Recipe Unit	Extended Cost
Produce	☒	LETTUCE LEAF		oz-wt	1	0.08	0.08
Produce	☒	TOMATO 5X6		each	.25	0.32	0.08
Grocery & Dry	☒	PICKLE DILL KO SPEAR 240-280CT	BBRLCLS	each	1	0.11	0.11
	☒						0.00
	☒						0.00
	☒						0.00
	☒						0.00
	☒						0.00
	☒						0.00
	☒						0.00
	☒						0.00
	☒						0.00
	☒						0.00
	☒						0.00
	☒						0.00
	☒						0.00
	☒						0.00
	☒						0.00
	☒						0.00
	☒						0.00
					Sub Recipe Cost		0.26
					Cost/Recipe Unit		0.26

Clear Recipe

Manual Entries

Sometimes it's easier to make a manual entry of an item that does not have a significant impact on the Sub Recipe cost. A good example of this is the addition of salt and pepper "to taste". You might want to include this addition in the documentation, but do not want to bother linking such a small and inconsequential amount.

Duplicate Recipe
Print Recipe

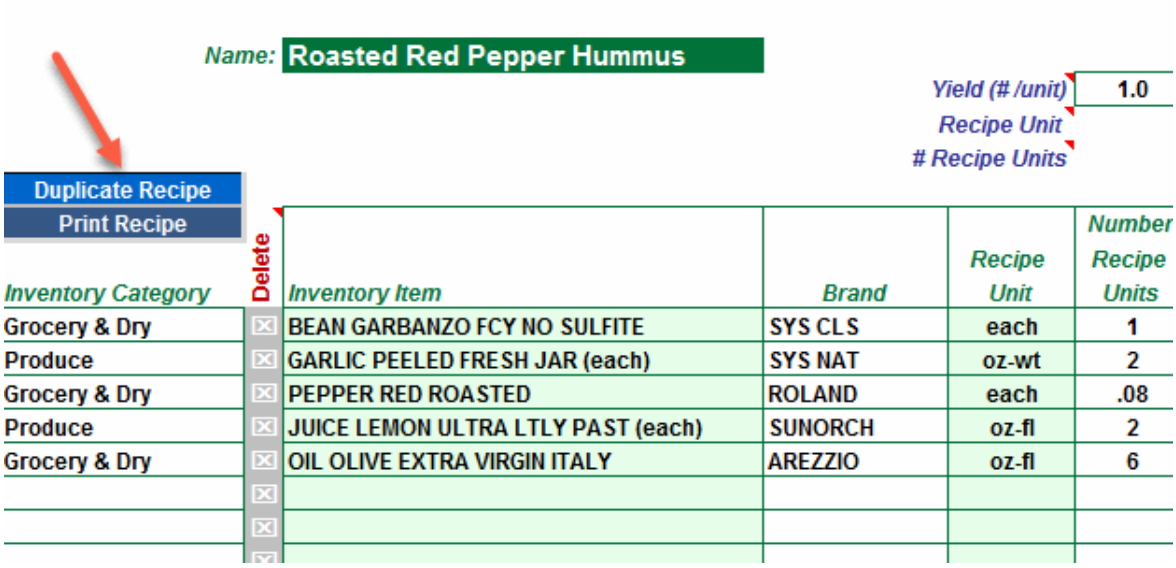
Inventory Category	Delete	Inventory Item	Brand	Recipe Unit	Number Recipe Units	Cost per Recipe Unit	Extended Cost
Grocery & Dry	☒	RICE PARBOILED PERFECT	SYS IMP	oz-wt	64	0.04	2.58
Produce	☒	ONION YELLOW JUMBO FRESH	SYS IMP	oz-wt	8	0.04	0.28
Grocery & Dry	☒	JUICE CLAM OCEAN	SYS OTT	oz-fl	46	0.05	2.40
Non Alc Bev	☒	WATER		oz-fl	80	0.00	0.01
Grocery & Dry	☒	SOUP BASE CHICKEN ULTM NO MSG	KNORR	oz-wt	2	0.49	0.98
	☒	Salt and Pepper to taste			1	0.02	0.02
	☒						0.00

Simply type the item directly into the cell and then tab over to the Cost per Recipe Unit column. Type the amount that you want to allocate, and then type the number 1 in the Number of Recipe Units column.

Duplicate an Existing Sub Recipe to Create a "Variation"

Let's say that you want to create a variation of an existing Sub Recipe. There is no need to re-enter it again if there are only a few substitutions. Simply duplicate it and make the necessary modifications.

- From the Sub Recipe you want to duplicate click on the "**Duplicate Recipe**" button.



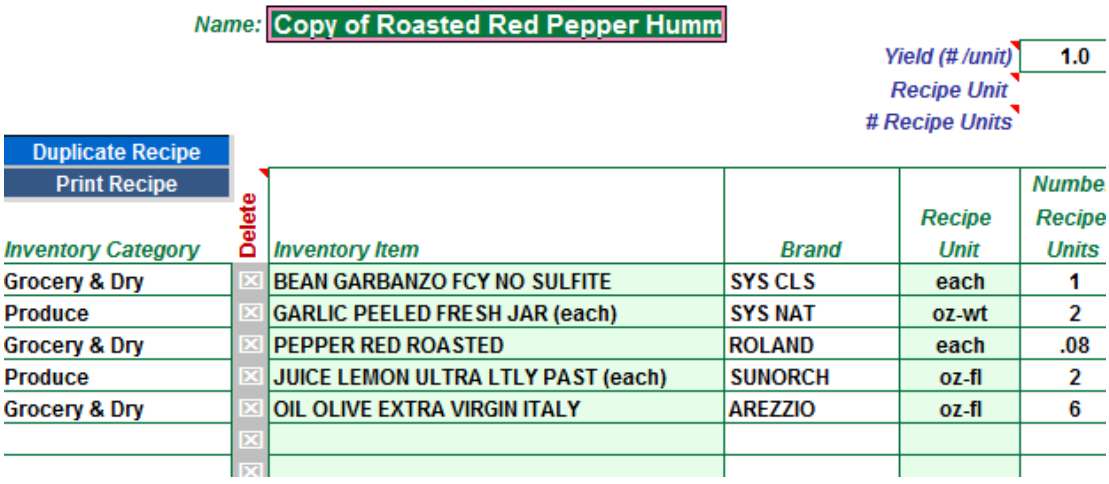
Name: Roasted Red Pepper Hummus

Yield (# /unit) 1.0
Recipe Unit
Recipe Units

Duplicate Recipe
Print Recipe

Inventory Category	Delete	Inventory Item	Brand	Recipe Unit	Number Recipe Units
Grocery & Dry	☒	BEAN GARBANZO FCY NO SULFITE	SYS CLS	each	1
Produce	☒	GARLIC PEELED FRESH JAR (each)	SYS NAT	oz-wt	2
Grocery & Dry	☒	PEPPER RED ROASTED	ROLAND	each	.08
Produce	☒	JUICE LEMON ULTRA LTLY PAST (each)	SUNORCH	oz-fl	2
Grocery & Dry	☒	OIL OLIVE EXTRA VIRGIN ITALY	AREZZIO	oz-fl	6
	☒				
	☒				
	☒				

- A new Sub Recipe will be created in the **first empty template**, and the name will be the same as the original but appended by the words "**Copy of**".



Name: Copy of Roasted Red Pepper Humm

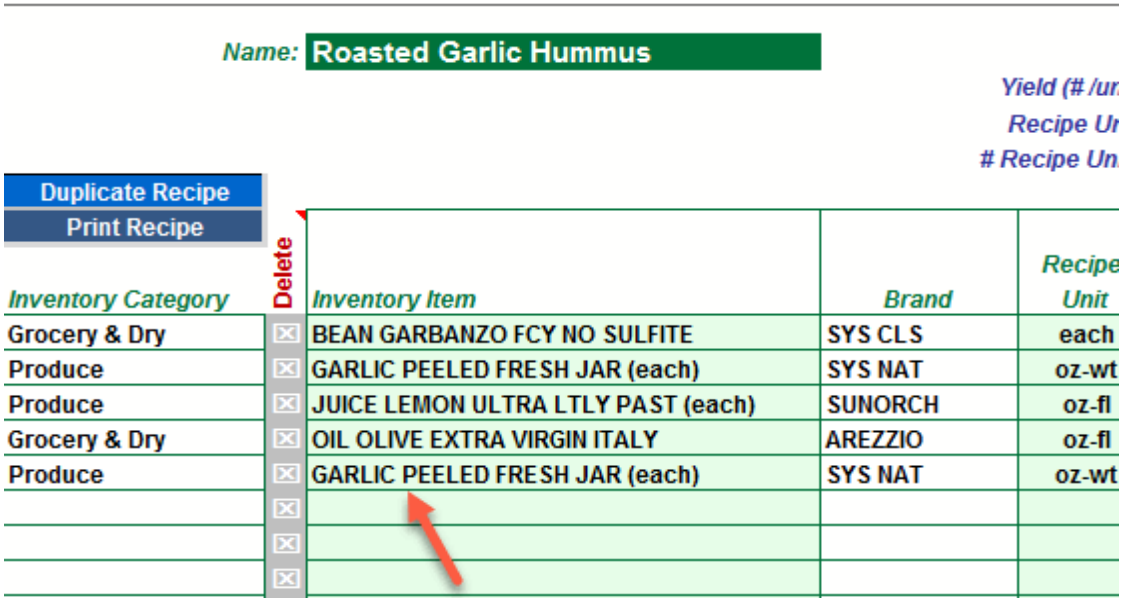
Yield (# /unit) 1.0
Recipe Unit
Recipe Units

Duplicate Recipe
Print Recipe

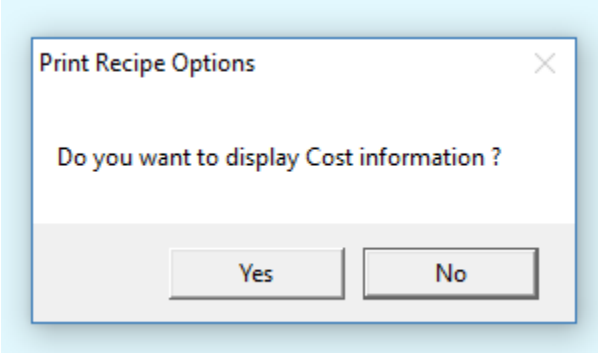
Inventory Category	Delete	Inventory Item	Brand	Recipe Unit	Numbe Recipe Units
Grocery & Dry	☒	BEAN GARBANZO FCY NO SULFITE	SYS CLS	each	1
Produce	☒	GARLIC PEELED FRESH JAR (each)	SYS NAT	oz-wt	2
Grocery & Dry	☒	PEPPER RED ROASTED	ROLAND	each	.08
Produce	☒	JUICE LEMON ULTRA LTLY PAST (each)	SUNORCH	oz-fl	2
Grocery & Dry	☒	OIL OLIVE EXTRA VIRGIN ITALY	AREZZIO	oz-fl	6
	☒				
	☒				

- Now rename the item (e.g. Garlic Hummus), and delete unwanted rows, add new ones, or both. To delete an unwanted item (row), double click on the "**X**"

cell in the column below the word "Delete". Note that Roasted Red Pepper was deleted and the Garlic was added

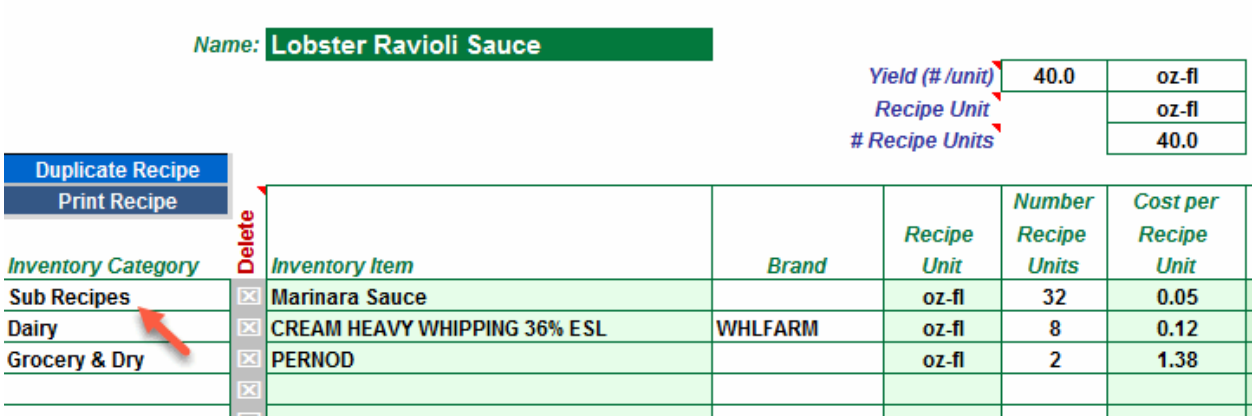


Print a Sub Recipe: To print each Sub Recipe to an 8.5 X 11 inch page (Landscape), simply click on the "**Print Recipe**" button. As shown below you will have the option to display the cost information or hide it.



Clear a Sub Recipe: It's as easy as clicking on the "**Clear Recipe"** button at the bottom left side of the template.

Link a Sub Recipe to a Menu Item (or to another Sub Recipe): To link to an existing Sub Recipe just select Sub Recipes from the Inventory Category drop down list, and then select it just as you would a regular inventory item. In the example below, I linked the Sub Recipe "Marinara Sauce" as the first ingredient in a new Sub Recipe "Lobster Ravioli Sauce"

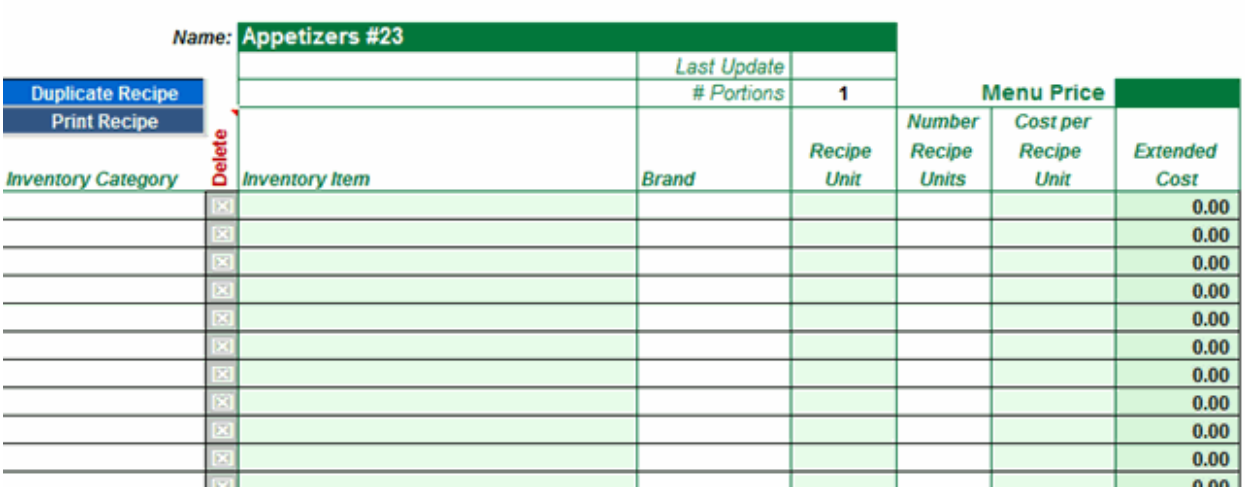

Name: Lobster Ravioli Sauce
Yield (# /unit) 40.0 oz-fl
Recipe Unit oz-fl
Recipe Units 40.0
Duplicate Recipe
Print Recipe
Delete
Inventory Category
Inventory Item
Brand
Recipe Unit
Number Recipe Units
Cost per Recipe Unit
Sub Recipes
Marinara Sauce
oz-fl 32 0.05
Dairy
CREAM HEAVY WHIPPING 36% ESL
WHLFARM
oz-fl 8 0.12
Grocery & Dry
PERNOD
oz-fl 2 1.38

Create Menu Items

EZchef provides 10 user-defined Menu Categories, each with 100 Menu templates (1,000 total templates). These categories can be viewed and edited from the Main Menu by selecting the "**Edit Menu Categories**" button as discussed earlier.

To create a new Menu item, select the **Menu Category** from the "**Add Menu Items and Sub Recipes**" drop down list on the Main Menu.

The program will display the first empty template which will be named as the **Menu Category** name followed by the **# sign** and the **number (1-100)**. For example "**Appetizers #23**"



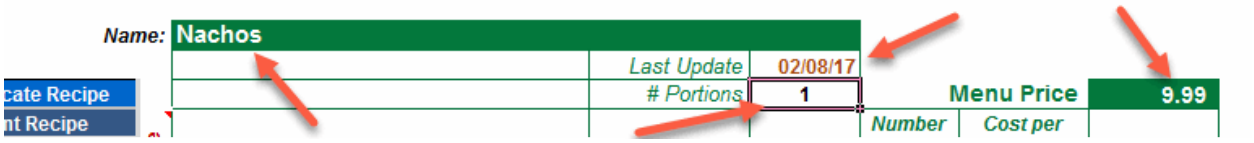
Here are the steps to create a new Menu Item:

- Enter the menu item name by over-writing the existing name in the Dark Green cell. Do Not include a # sign in the menu item name!

- Enter the Date in the "**Last Update**" cell (optional).

- The **"# of Portions**" defaults to "1" but you can edit this cell if the recipe will yield more than one serving.

- Enter the **Menu Price**



- Starting with the first row select the Inventory Category cell to activate the drop down box. Select the **Inventory Category** (includes **Sub Recipes**) for that item (e.g. Produce)

- Move or Tab to the right and select the **Inventory Name** cell to activate its drop down box. Select the item from the alphabetical list of all items in that category.

- The previously assigned **Brand**, **Recipe Unit** and current **Recipe Unit Cost** will be automatically entered. All you need to do is enter the **Number of Recipe Units** for that menu Item. The extended cost will be displayed.

- Continue down the template adding all remaining inventory items that make up the Menu Item (the program is limited to 20 rows e.g. 20 items)

Name: Nachos

Last Update

Portions 1

Menu Price 9.99

Duplicate Recipe

Print Recipe

Inventory Category	Delete	Inventory Item	Brand	Recipe Unit	Number Recipe Units	Cost per Recipe Unit	Extended Cost
Sub Recipes	☒	Nacho Mix		oz-wt	1	0.28	0.28
Dairy	☒	CHEESE PEPPER JACK LOAF	BBRLIMP	oz-wt	6	0.23	1.36
Produce	☒	LETTUCE GREEN LEAF CROWNS	SYS NAT	each	1	0.10	0.10
Sub Recipes	☒	Avocado Relish		oz-wt	1	0.63	0.63
Produce	☒	GARY - TOMATOES		oz-wt	2	0.04	0.09
Grocery & Dry	☒	PEPPER PIQUANTE SWT WHL MILD	PEPPDEW	each	.008	22.94	0.18

- A completed template is shown below. Note that the **Recipe Cost**, **Portion Cost, Food Cost %, and Gross Margin** (Gross Profit) are all displayed at the bottom of the template

Name: Nachos

Duplicate Recipe | Print Recipe | Clear Recipe

Last Update | # Portions: 1 | Menu Price: 9.99

Inventory Category	Delete	Inventory Item	Brand	Recipe Unit	Number Recipe Units	Cost per Recipe Unit	Extended Cost
Sub Recipes	☒	Nacho Mix		oz-wt	1	0.28	0.28
Dairy	☒	CHEESE PEPPER JACK LOAF	BBRLIMP		6	0.23	1.36
Produce	☒	LETTUCE GREEN LEAF CROWNS	SYS NAT	each	1	0.10	0.10
Sub Recipes	☒	Avocado Relish		oz-wt	1	0.63	0.63
Produce	☒	GARY - TOMATOES		oz-wt	2	0.04	0.09
Grocery & Dry	☒	PEPPER PIQUANTE SWT WHL MILD	PEPPDEW	each	.008	22.94	0.18
	☒						0.00
	☒						0.00
	☒						0.00
	☒						0.00
	☒						0.00
	☒						0.00
	☒						0.00
	☒						0.00
	☒						0.00
	☒						0.00
	☒						0.00
	☒						0.00

Recipe Cost: 2.65
Portion Cost: 2.65
Food Cost % (portion): 26.5%
Gross Margin (portion): 7.34

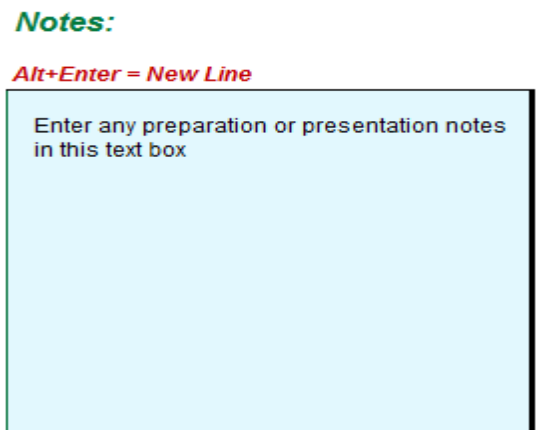
Note: Sometimes it's easier to make a manual entry of an item that does not have a significant impact on menu item cost. A good example of this is the addition of salt and pepper "to taste". You might want to include this addition in the documentation, but not want to bother linking such a small and inconsequential amount.

Duplicate Recipe | Print Recipe

Inventory Category	Delete	Inventory Item	Brand	Recipe Unit	Number Recipe Units	Cost per Recipe Unit	Extended Cost
Grocery & Dry	☒	RICE PARBOILED PERFECT	SYS IMP	oz-wt	64	0.04	2.58
Produce	☒	ONION YELLOW JUMBO FRESH	SYS IMP	oz-wt	8	0.04	0.28
Grocery & Dry	☒	JUICE CLAM OCEAN	SYS OTT	oz-fl	46	0.05	2.40
Non Alc Bev	☒	WATER		oz-fl	80	0.00	0.01
Grocery & Dry	☒	SOUP BASE CHICKEN ULTM NO MSG	KNORR	oz-wt	2	0.49	0.98
	☒	Salt and Pepper to taste			1	0.02	0.02
	☒						0.00

Simply type the item directly into the cell and then tab over to the **Cost per Recipe Unit** column. Type the amount that you want to allocate, and then type the number 1 in the **Number of Recipe Units** column.

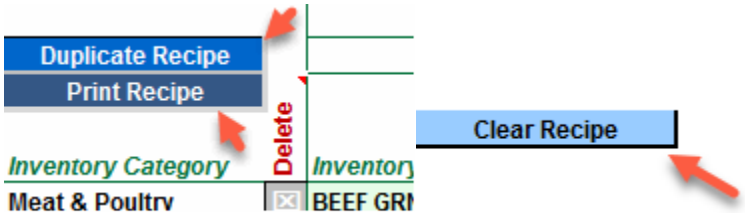
- You can document the preparation of the menu item using the blue box to the right of the template.



- You can also insert a photo of the menu item by clicking on the "**Insert Picture**" button to the right of the Template, and then select the image from your hard drive (will accept *.png, *.jpg, and *.gif file formats).



- Similar to Sub Recipes, you can **Duplicate** a Menu Item; **Print** a Menu Item to an 8 X 11.5 inch page (Landscape), or **Clear** a Recipe.



- **Delete** a previously entered item in the template by double clicking on the "**X**" cell to the left of the item name.

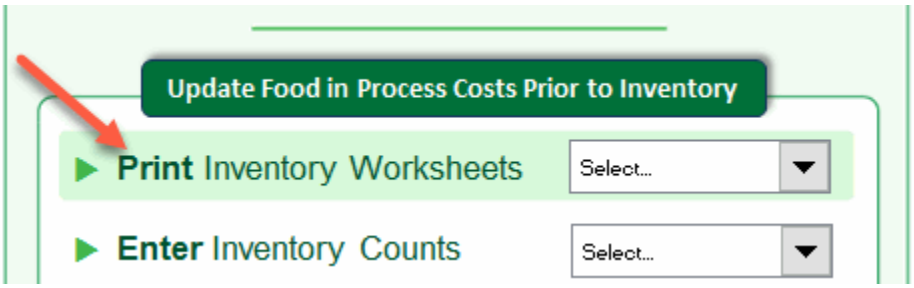


Physical Inventory Counts

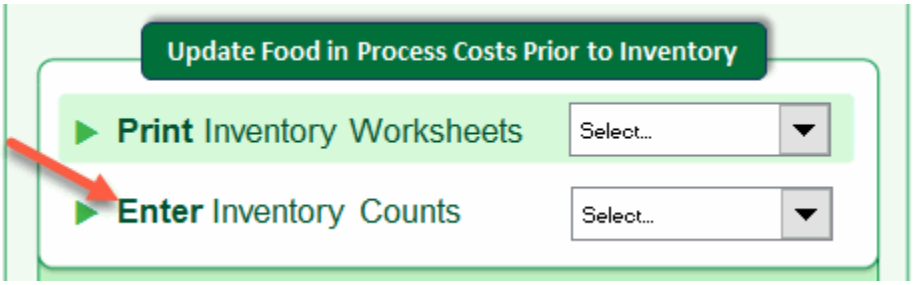
You can take your period ending "physical" inventory counts in EZchef organized either by **Inventory Category** (e.g. Produce, Dairy, Frozen), or by the **Inventory Location** where the items are stored in the restaurant (e.g. Walk In, Freezer, Dry Storage Room, Beer Cooler). Whichever way you choose to count your inventory, totals will be summarized by inventory Category.

Note: You can also account for "Food in Process" (e.g. items prepared in the restaurant and represented by your Sub Recipes that you want to include when taking inventory). This procedure will be covered at the end of this section.

- **The procedure for taking inventory with EZchef begins by printing the count sheets.**

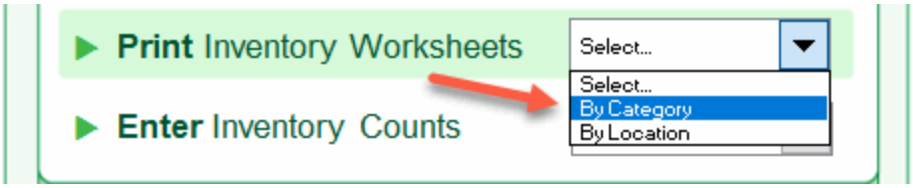


- **Once printed, write the counts on the printed sheets, and when done, enter the counts into the program.**



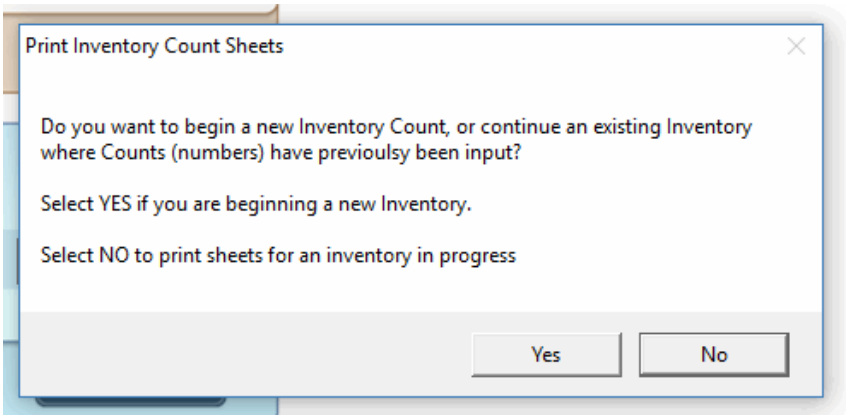
Inventory by Category

If taking your counts by inventory category (e.g. Produce, Dairy, and Frozen) then select **Print Inventory Worksheets…By Category**.

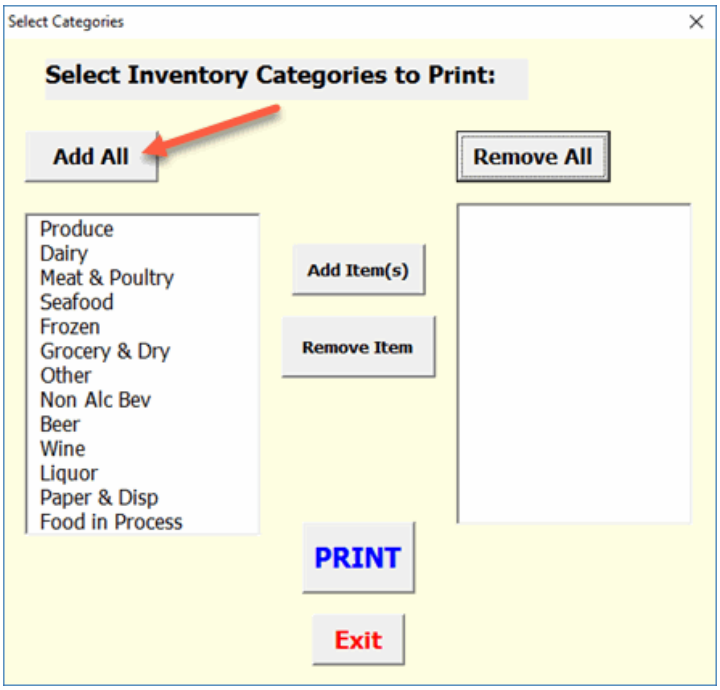


If you are beginning a new inventory, and have not yet entered counts into the program for the current inventory period, then select "**Yes"** from the window below. If you have previously entered counts into the program, and need to print more count sheets to complete the process, then select "**No"**.

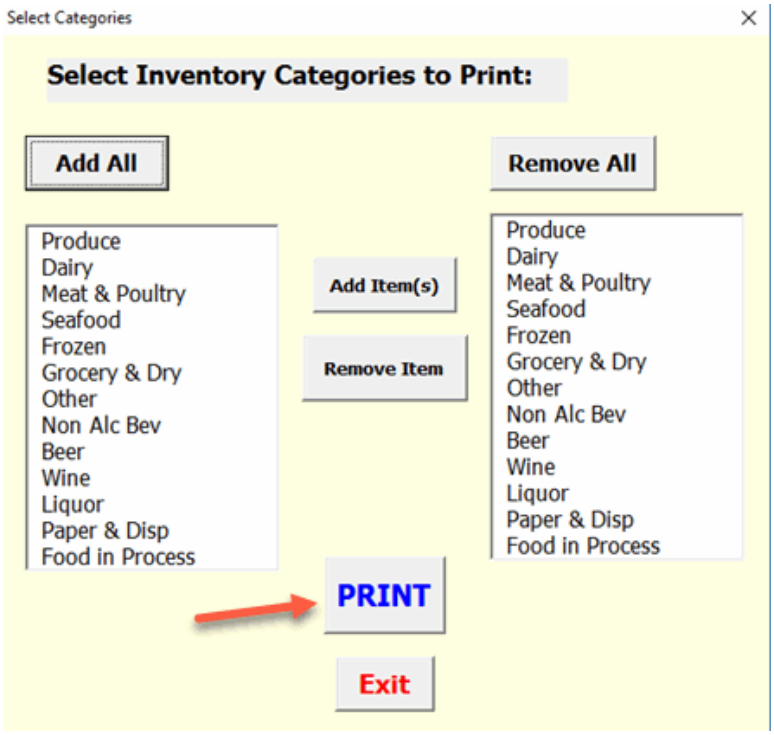
Note: It is critical that you make the correct selection in the screen below. By selecting **"Yes"** you are telling the program that your last inventory is completed, and the program then moves the completed inventory summary totals to a new section in the program that now represents your **Previous** Inventory. This makes room to enter the new inventory counts and totals, and permits the program to calculate the difference between the previous totals and the current totals.



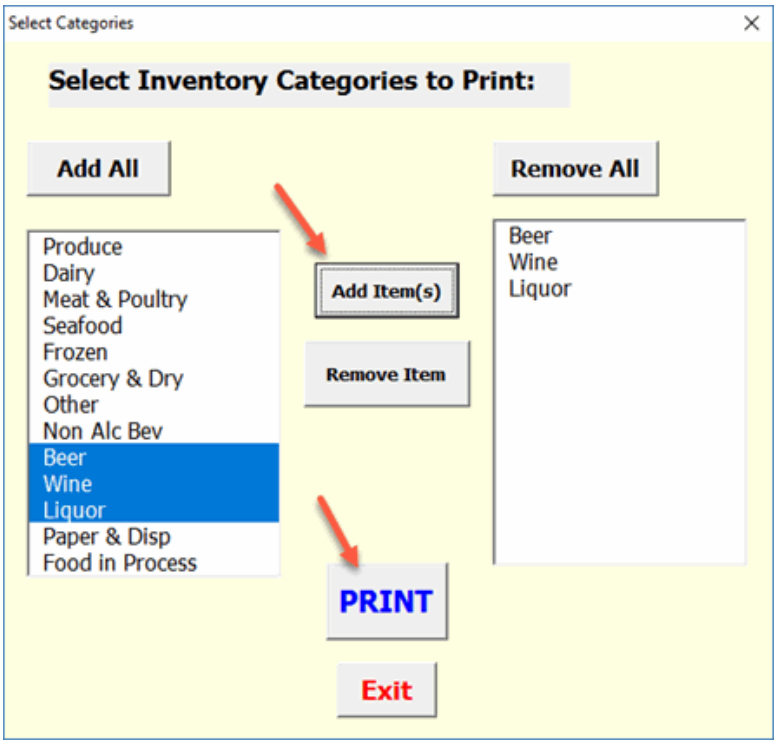
You can print count sheets for all inventory categories by selecting the "**Add All**" button.



This will move all categories to the right window pane. Then select "**PRINT**".



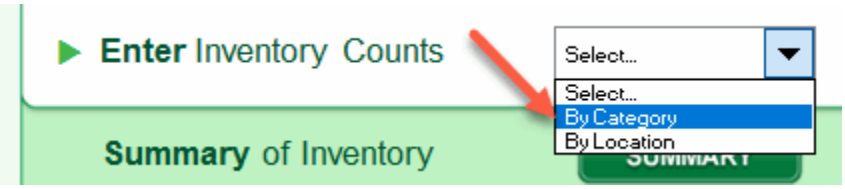
If you want to print selected sheets, click on those categories you want to be included, and select the "**Add Item(s)**" button. Then click "**PRINT**"



The count sheets will include the item's **Count Unit** and **Count Unit Cost** information, and will provide you with three columns for writing the counts based on where the items are stored (if the item is stored in multiple locations). When done, simply total the numbers, and enter into the "**Total**" column.

Item	Unit Cost	Count Unit	Location 1	Location 2	Location 3	Total
Produce						
AVOCADO HASS 100% CHNKY PULP	7.17	pack				
AVOCADO HASS FRSH HALVES	0.79	each				
BASIL FRESH	5.89	lb				
BROCCOLI FLORET FRSH	6.04	bag				
CARROT LOOSE FRESH LARGE	0.50	lb				
CELERY FRESH	1.02	bunch				
CHIVE FRESH HERB	6.38	pack				
CUCUMBER SELECT FRESH	0.42	lb				
DILL BABY FRESH HERB	6.51	pack				
GARLIC PEELED FRESH JAR (each)	3.10	lb				
GARY - CARROTS	0.40	lb				
GARY - CANTELOPE	2.00	each				
GARY - GRAPE TOMATOES	1.75	each				
GARY - LEMONS	44.00	case				
GARY - LIMES	26.00	case				
GARY - PINEAPPLE	2.17	each				
GARY - RED ONION	0.56	lb				
GARY - RED PEPPER	0.58	each				
GARY - TOMATOES	0.71	lb				
GARY - YELLOW ONION	0.36	lb				
GARY - YELLOW SQUASH	16.00	case				
GARY - ZUCCHINI	13.00	case				
GINGER PICKLED	0.14	pack				

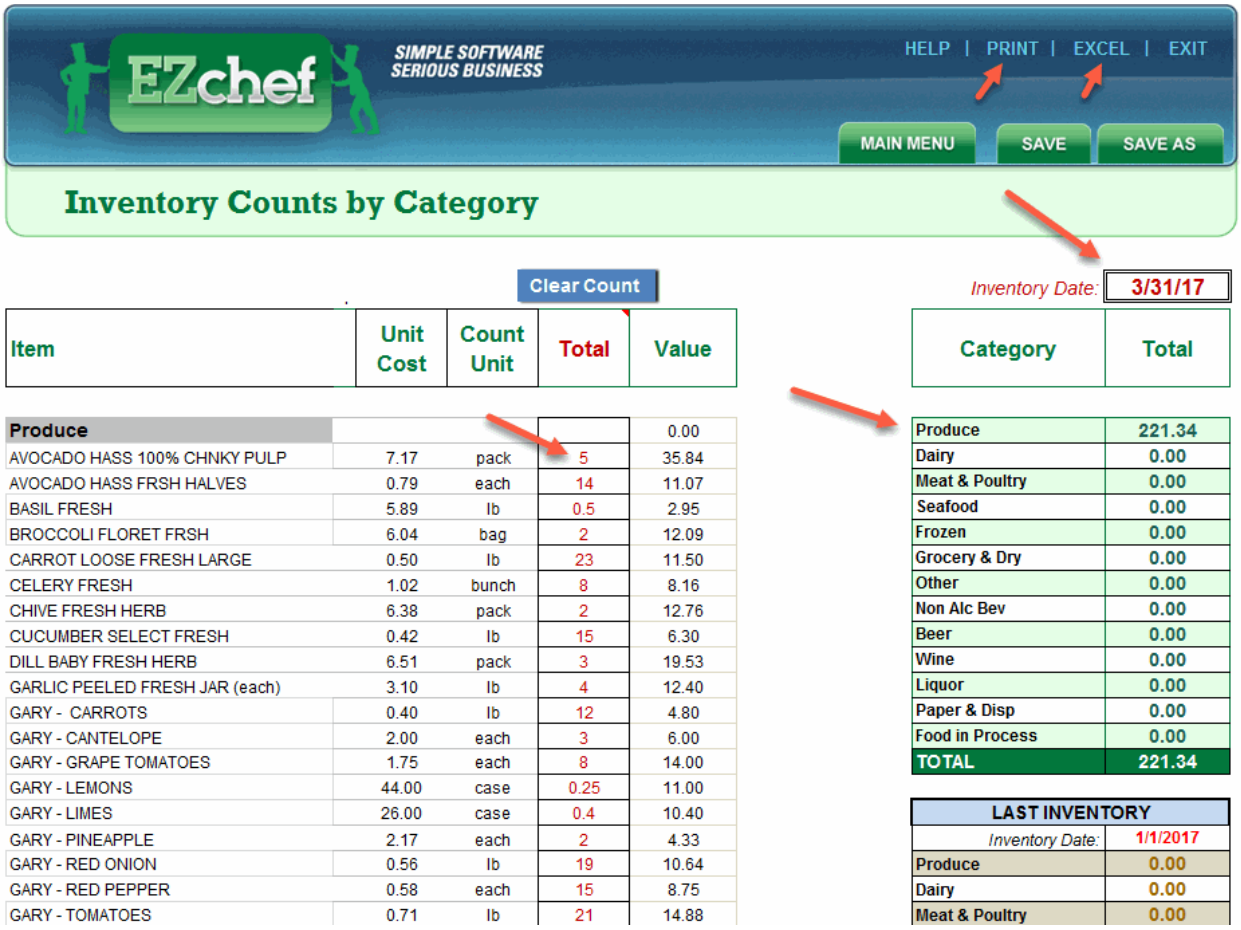
Now you can enter the counts into the program. Select **Enter Inventory Counts…By Category**.



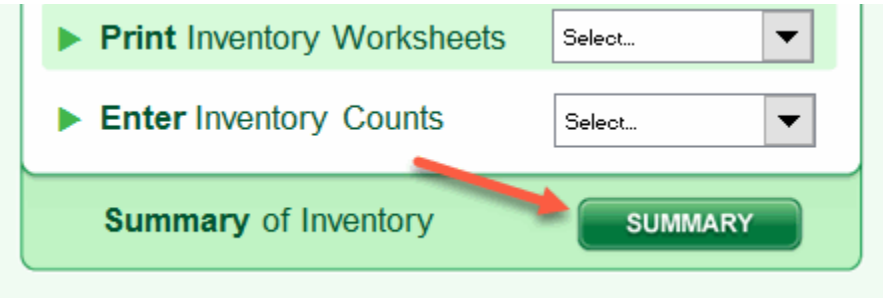
Make your entries into the program as shown below. The program will perform the extensions (e.g. calculate the values), and maintain a running summary in the section to the right.

When you have completed entering the counts, enter the **Inventory Date**. Before returning the Main Menu you can **Print** a detailed list of the counts, or **Export** the detail to a new **Excel** workbook for future reference.

Alert: When you begin a new inventory count the program will not save the count details, so its good practice to save this detail either by printing or exporting to a new Excel file. However, when you begin a new inventory count the program will move the summary totals from the current location down to the Last Inventory section.



When you return to the Main Menu you can also view the latest summary totals by selecting the **Summary of Inventory** button.

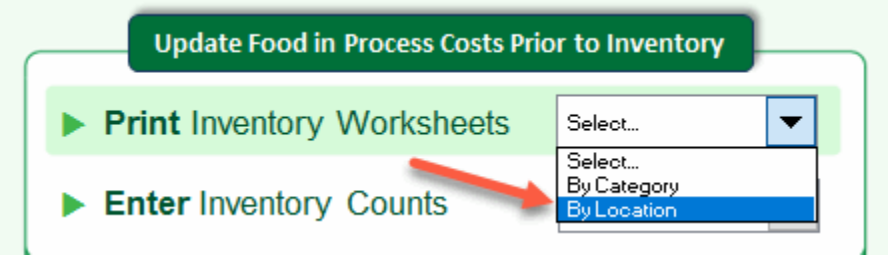


Inventory by Location

Taking inventory **by Location** is arguably an easier and more efficient method than **by Category**. Moreover, when taking inventory by location, you can number the items on your count sheets to reflect the shelf order where they are stored (referred to as "**shelf-to-sheet**" inventory). This makes counting even easier as

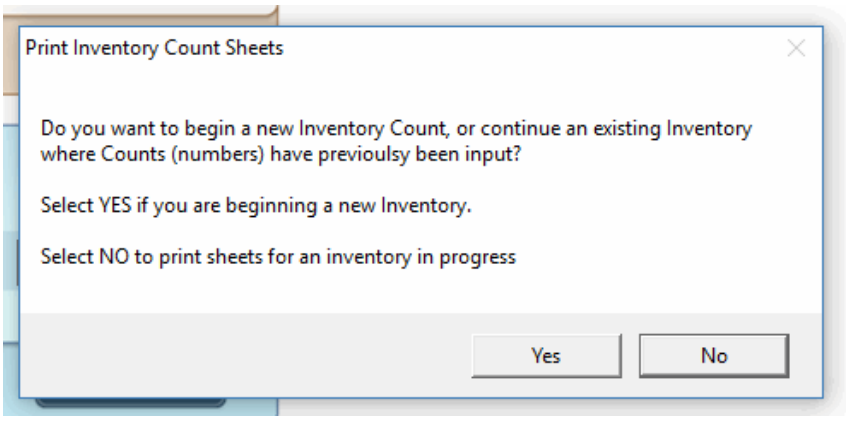
you can start, for example, on the upper left of the top shelf and move across the shelf with ease rather than searching for each item on the printed sheet.

Start the process by selecting "**By Location**" from the **Print Inventory Worksheets** drop down list.

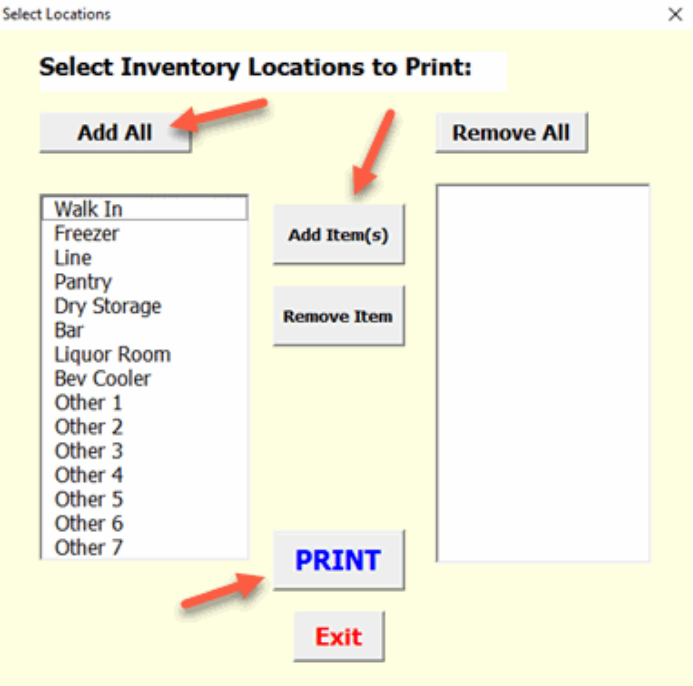


If you are beginning a new inventory, and have not yet entered counts into the program for the current inventory period, then select "**Yes"** from the window below. If you have previously entered counts into the program, and need to print more count sheets to complete the process, then select "**No"**.

Note: It is critical that you make the correct selection in the screen below. By selecting **"Yes"** you are telling the program that your last inventory is completed, and the program then moves the completed inventory summary totals to a new section in the program that now represents your **Previous** Inventory. This makes room to enter the new inventory counts and totals, and permits the program to calculate the difference between the previous totals and the current totals.



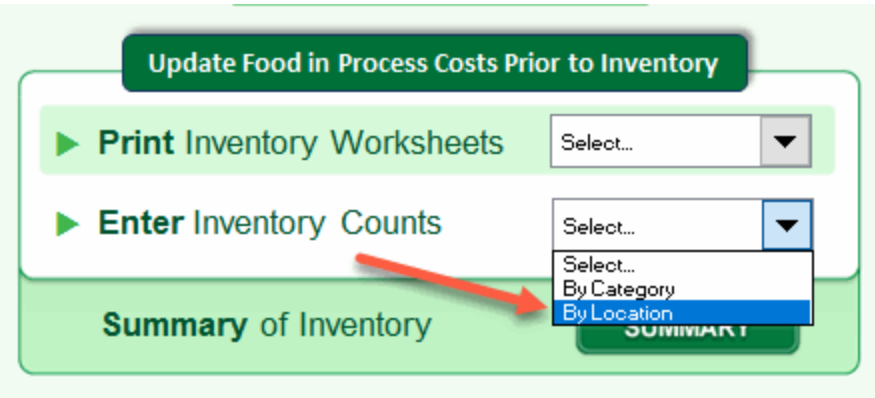
Print count sheets for all inventory locations by selecting the "**Add All**" button. This will move all categories to the right window pane. Then select "**PRINT**".



If you want to print selected sheets, click on those **Locations** you want included, and select the "**Add Item(s)**" button. Then click "**PRINT**"

The count sheets will include the items **Count Unit** and **Count Unit Cost** information. If you want to "number" the shelf order of products to make recording easier, then this is the time to do so. Write the numbers in the left column of the count sheet as you also write down your counts. You will enter both the numbers and the counts when you input into the program.

Now enter the counts by selecting **Enter Inventory Counts…By Location**



	Freezer				0.00
3	BREAD BUN HMBRGR 4 inch SLI SESAME	7.38	bag	10	73.75
4	BREAD EGG BRIOCHE	49.30	bag	4	197.20
6	BREAD TOAST HOLLAND 3 inch	41.55	bag	1.2	49.86
5	BREAD WHITE PULLMAN SLICED	4.25	each	12	51.00
2	BREAD WHITE SHORTY 11 IN BKD	0.51	each	11	5.58
10	BROWNIE CHOC CHUNK FABULOUS	14.16	each	2	28.33
1	BUN HAMBURGER SLIDER	60.35	bag	0.5	30.18
29	CRAWFISH TAIL MEAT SPAN100-150	7.39	lb	3.5	25.85
9	CROISSANT SLI 4 OZ	0.84	each	15	12.60
8	DOUGH BREAD FRENCH	1.22	each	9	10.97
7	DOUGH PIZZA PROOFED	2.40	each	3	7.19
15	DRESSING MIX DIRTY RICE	2.68	lb	21	56.31
17	ENTREE POTATO SWEET CASSRL	11.29	each	2	22.58
14	NOODLE UDON JAPNSE	7.90	each	4	31.60
16	OKRA CUT IQF P	3.40	each	4	13.60
20	ONION RING BEER BATTER 5/8 inch	6.78	each	8	54.20
19	ONION RING TANGLERS FLOUR BRD	5.70	each	5	28.50
18	POTATO FRY STR 3/8 inch XL RCPCH	4.53	each	11	49.87
21	POTATO MASHED RED/SKN RST GRL	4.97	each		0.00
12	ROLL GALLAGHER BKD	26.60	bag	2.5	66.50
13	ROLL HOAGIE 5 OZ 11 IN	6.44	bag	1	6.44
11	ROLL HOAGIE WHEAT UNSLICE 11 inch	5.29	bag	3	15.88
25	SHRIMP PUD RAW 70/90 CT	3.73	lb	24	89.50
27	SHRIMP WHT GH 16/20 USA (each)	7.76	lb	5	38.80
26	SHRIMP WHT PUD 90/110 USA	3.84	lb		0.00
22	SOUP TORTILLA MEXICAN CONC	15.65	each	5	78.25
24	SPINACH CHOPPED GRADE A	2.81	each	12	33.70
23	TOMATO GREEN FRIED BRD	10.90	each	1	10.90
28	TUNA AHI #2 LOIN FRSH BIGEYE	15.35	lb	1.8	27.63

The next time you enter counts by location, the program will prompt you to Sort the items either Alphabetically (A,B,C) or Numerically (1,2,3). Select the latter to display your sheets by the sort sequence you entered previously.



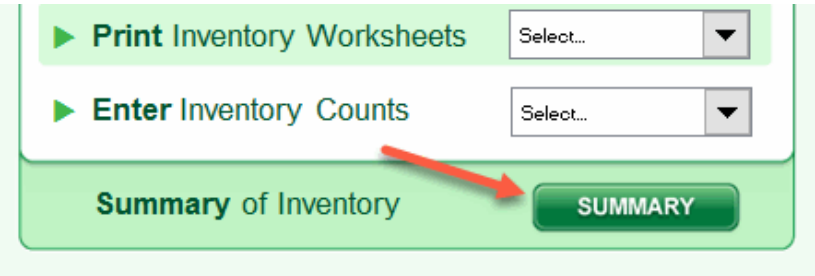
	Freezer				0.00
1	BUN HAMBURGER SLIDER	60.35	bag	0.5	30.18
2	BREAD WHITE SHORTY 11 IN BKD	0.51	each	11	5.58
3	BREAD BUN HMBRGR 4 inch SLI SESAME	7.38	bag	10	73.75
4	BREAD EGG BRIOCHE	49.30	bag	4	197.20
5	BREAD WHITE PULLMAN SLICED	4.25	each	12	51.00
6	BREAD TOAST HOLLAND 3 inch	41.55	bag	1.2	49.86
7	DOUGH PIZZA PROOFED	2.40	each	3	7.19
8	DOUGH BREAD FRENCH	1.22	each	9	10.97
9	CROISSANT SLI 4 OZ	0.84	each	15	12.60
10	BROWNIE CHOC CHUNK FABULOUS	14.16	each	2	28.33
11	ROLL HOAGIE WHEAT UNSLICE 11 inch	5.29	bag	3	15.88
12	ROLL GALLAGHER BKD	26.60	bag	2.5	66.50
13	ROLL HOAGIE 5 OZ 11 IN	6.44	bag	1	6.44
14	NOODLE UDON JAPNSE	7.90	each	4	31.60
15	DRESSING MIX DIRTY RICE	2.68	lb	21	56.31
16	OKRA CUT IQF P	3.40	each	4	13.60
17	ENTREE POTATO SWEET CASSRL	11.29	each	2	22.58
18	POTATO FRY STR 3/8 inch XL RCPCH	4.53	each	11	49.87
19	ONION RING TANGLERS FLOUR BRD	5.70	each	5	28.50
20	ONION RING BEER BATTER 5/8 inch	6.78	each	8	54.20
21	POTATO MASHED RED/SKN RST GRL	4.97	each		0.00
22	SOUP TORTILLA MEXICAN CONC	15.65	each	5	78.25
23	TOMATO GREEN FRIED BRD	10.90	each	1	10.90
24	SPINACH CHOPPED GRADE A	2.81	each	12	33.70
25	SHRIMP PUD RAW 70/90 CT	3.73	lb	24	89.50
26	SHRIMP WHT PUD 90/110 USA	3.84	lb		0.00
27	SHRIMP WHT GH 16/20 USA (each)	7.76	lb	5	38.80

Note: You can easily edit the sort sequence by changing the numbers in the left column. If you need to **add a new number** that is between two previously entered items, use a "fraction" to do so (e.g. if you want to add a new item between numbers 6 and 7, then assign 6.1 for the new item. When you return to this sheet the next time you enter counts, the list will resort, and your new number 6.1 will now display as 7, and 7 will display as 8 etc.)

When you have completed entering the counts, enter the **Inventory Date**. Before returning the Main Menu you can **Print** a detailed list of the counts, or **Export** the detail to a new **Excel** workbook for future reference.

Alert: When you begin a new inventory count the program will not save the count details, so its good practice to save this detail either by printing or exporting to a new Excel file. However, when you begin a new inventory count the program will move the summary totals from the current location down to the Last Inventory section.

When you return to the Main Menu you can also view the latest summary totals by selecting the "**Summary of Inventory**" button.



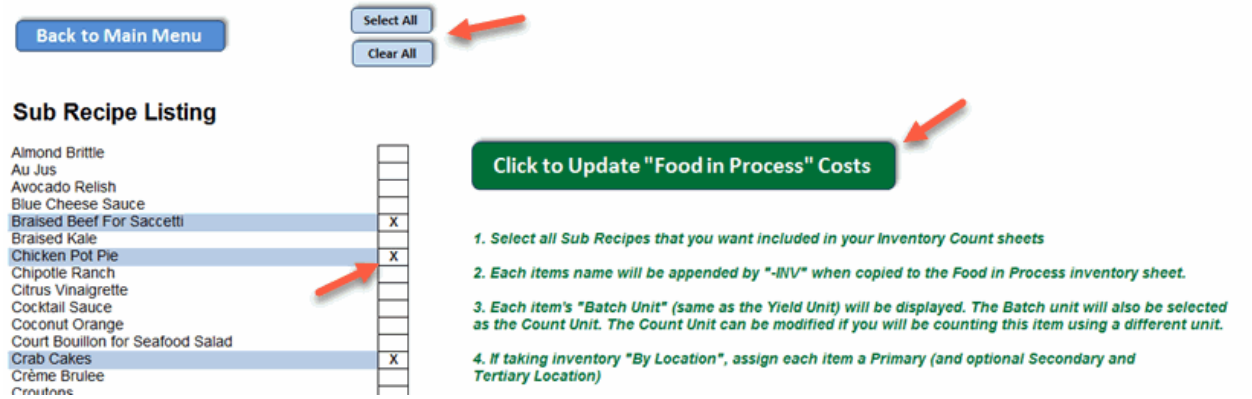
Food in Process

EZchef allows you to account for prepared food items that would otherwise not be counted when taking inventory. These items will be represented by your Sub Recipes.

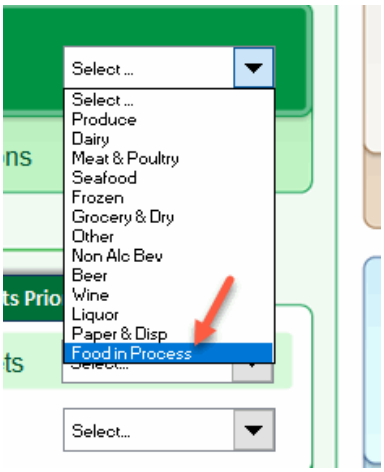
Prior to printing your Inventory sheets you have the option to update these items and their current value by clicking on the button as shown below.



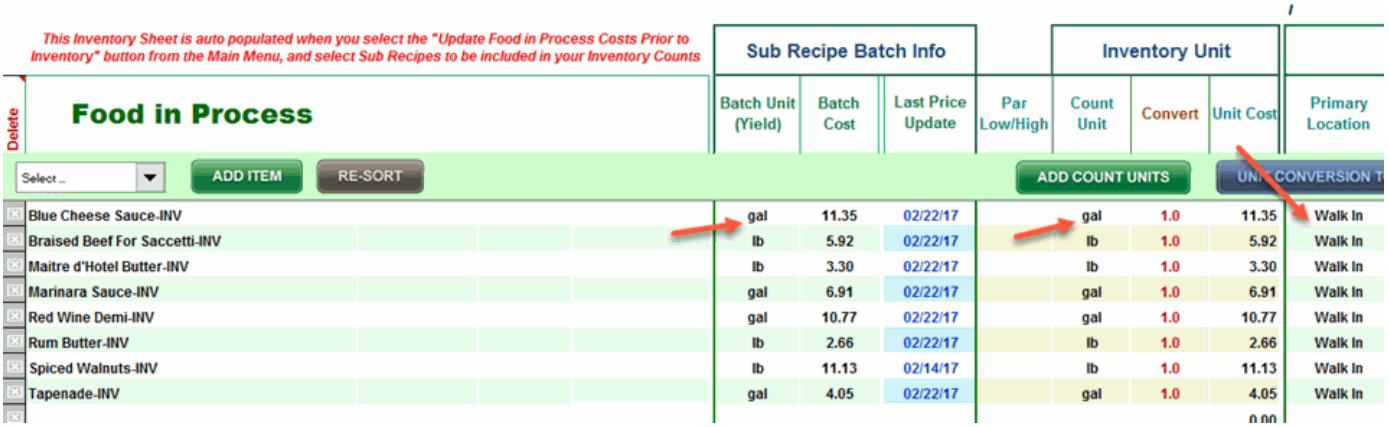
Now you can select those items in your Sub Recipes list that you want to include in the inventory count sheets. After selecting items that you want to include in your counts, click on the Update button.



The program will add these items to the **Food in Process** inventory sheet (below).



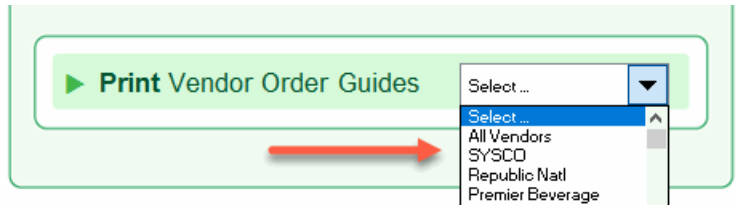
The Sub Recipe "**Yield Unit**" you used in the template will be transferred and renamed as the "**Batch Unit**". The corresponding "**Batch Unit Cost"** will also be entered. For counting purposes the program will also enter the Batch Unit as the preferred Count Unit, but you can edit this if you want to count the item using a different unit. <u>You still need to assign the Location(s) where the items are stored.</u>



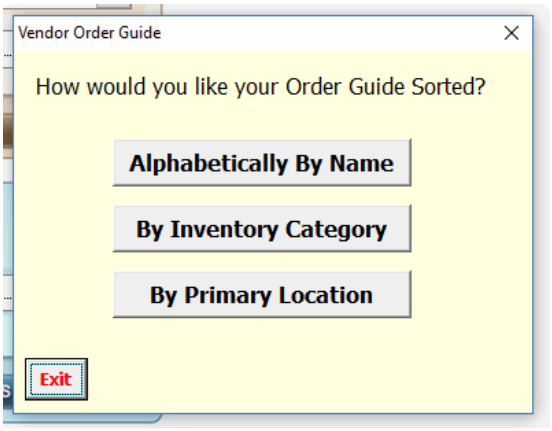
Vendor Order Guides

Use Vendor Order Guides to place your orders in an orderly and efficient manner, ordering only what you need based on established **Par Levels** and **On Hand** amount.

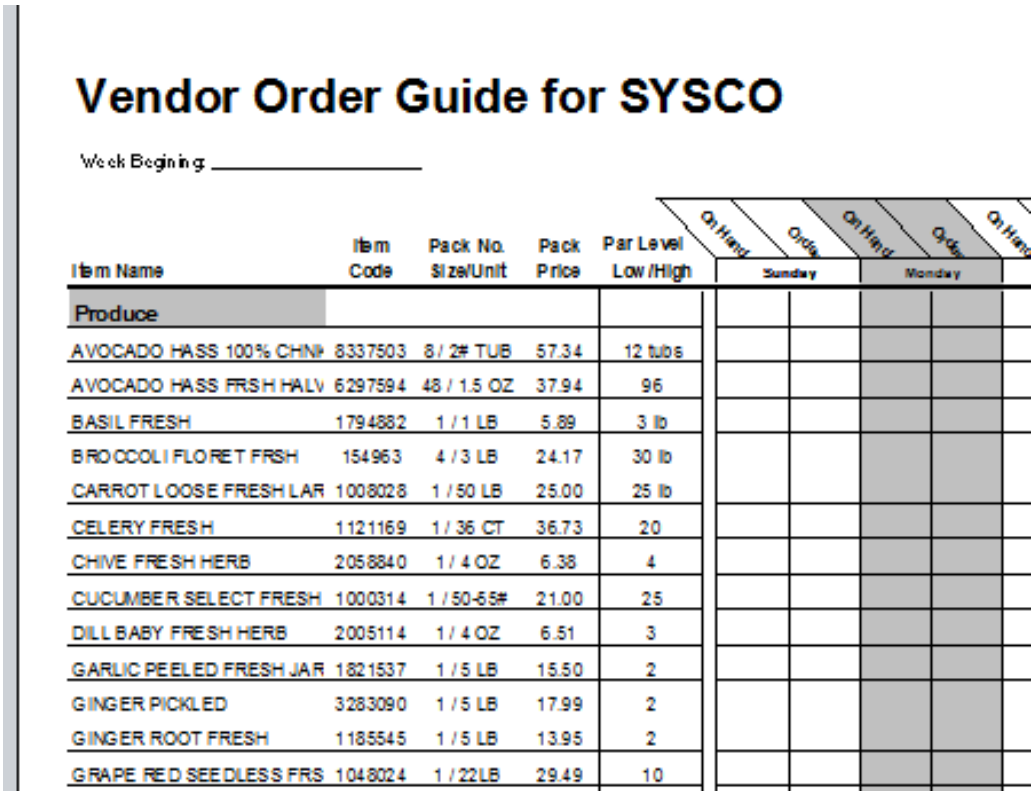
You can print your items from a specific vendor or print all vendors in the list.



You can also print your Order Guides sorted Alphabetically by **Name**, Alphabetically by **Inventory Category** or Alphabetically by **Primary Location**.



The printed sheets include the **Item Code**, **Pack No./Size**, **Pack Price**, **Par Level**, and space to enter the **On Hand** and **Order** for **six** days' orders.



Vendor Order Guide for SYSCO

Week Beginning: _____

Item Name	Item Code	Pack No. Size/Unit	Pack Price	Par Level Low/High	On Hand	Order	On Hand	Order	On Hand
					Sunday		Monday		
Produce									
AVOCADO HASS 100% CHNK	8337503	8 / 2# TUB	57.34	12 tubs					
AVOCADO HASS FRSH HALV	6297594	48 / 1.5 OZ	37.94	96					
BASIL FRESH	1794882	1 / 1 LB	5.89	3 lb					
BROCCOLI FLORET FRSH	154963	4 / 3 LB	24.17	30 lb					
CARROT LOOSE FRESH LAR	1008028	1 / 50 LB	25.00	25 lb					
CELERY FRESH	1121169	1 / 36 CT	36.73	20					
CHIVE FRESH HERB	2058840	1 / 4 OZ	6.38	4					
CUCUMBER SELECT FRESH	1000314	1 / 50-65#	21.00	25					
DILL BABY FRESH HERB	2005114	1 / 4 OZ	6.51	3					
GARLIC PEELED FRESH JAR	1821537	1 / 5 LB	15.50	2					
GINGER PICKLED	3283090	1 / 5 LB	17.99	2					
GINGER ROOT FRESH	1185545	1 / 5 LB	13.95	2					
GRAPE RED SEEDLESS FRS	1048024	1 / 22LB	29.49	10					

Menu Analysis Feature

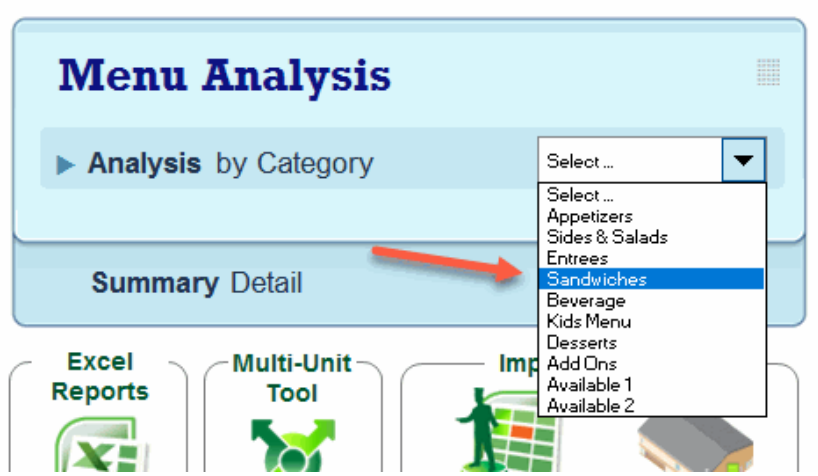
The Menu Analysis function of EZchef is arguably it's most powerful and unique feature.

There have been many methods developed by restaurant "academics" to evaluate and analyze a restaurant's menu and its performance. All were developed for the purpose of maximizing or optimizing bottom line profits. These methods typically include "metrics" such as the **menu item cost**, **selling price**, **cost %** (cost/selling price), the **number of each item sold** for a specific time period (also referred to as sales mix, p-mix or menu mix), and even the design of the menu, and optimum placement of specific items to draw the customers attention.

Sadly, most restaurant operators focus a disproportionate amount of time on saving a nickel here and there in their purchasing, rather than evaluating their menu's performance and taking appropriate actions. In most cases they simply do not know how to do this, and do not have an appropriate tool to do so.

EZchef utilizes what is referred to as the **Cost/Margin Analysis** method (developed by David Pavesic), and we believe that this is the most comprehensive approach.

Begin by selecting the **Menu Category** from the drop down list below.



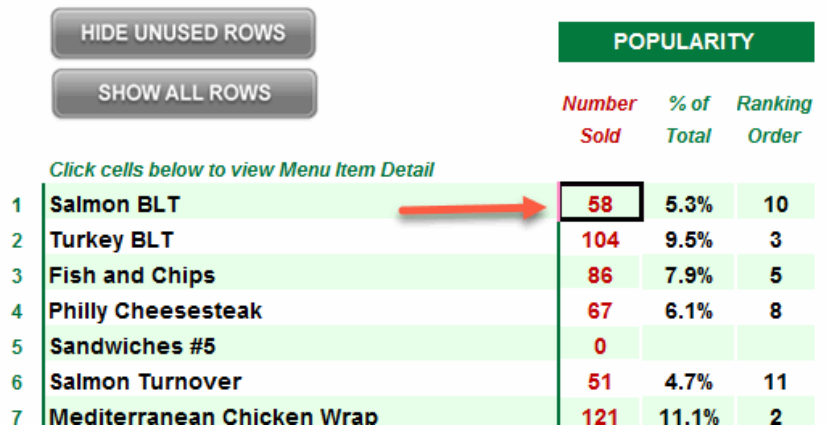
A table with data from each menu item will appear. Use your POS or cash register system to print out a list of the number of each item sold for a specific time period (typically monthly or quarterly as the sales mix does not change significantly over shorter periods).

HIDE UNUSED ROWS
SHOW ALL ROWS

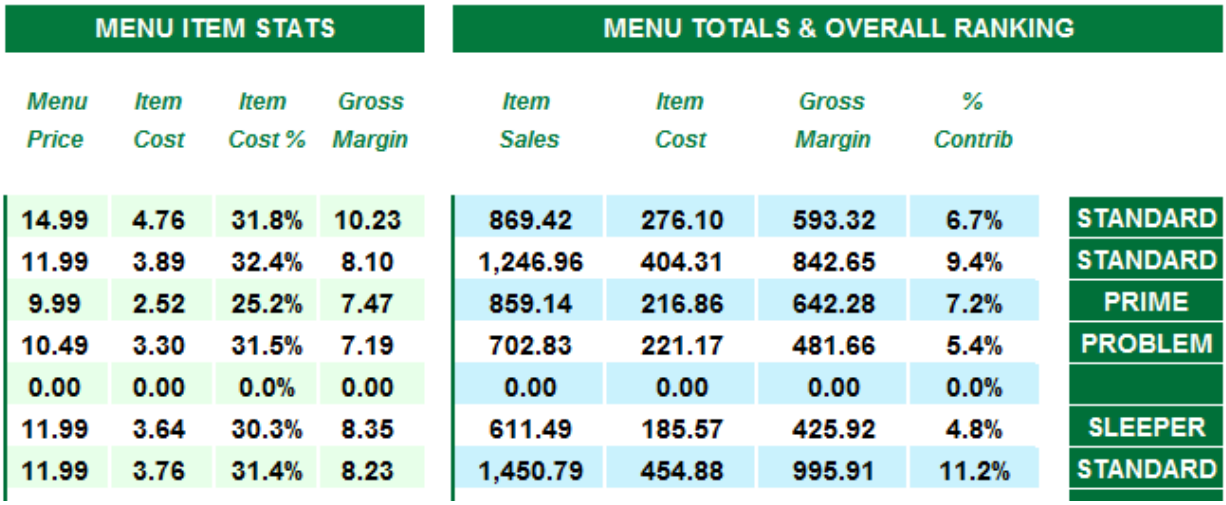
		POPULARITY			MENU ITEM STATS				MENU TOTALS & OVERALL RANKING				
	Click cells below to view Menu Item Detail	Number Sold	% of Total	Ranking Order	Menu Price	Item Cost	Item Cost %	Gross Margin	Item Sales	Item Cost	Gross Margin	% Contrib	
1	Salmon BLT	58	5.3%	10	14.99	4.76	31.8%	10.23	869.42	276.10	593.32	6.7%	STANDARD
2	Turkey BLT	104	9.5%	3	11.99	3.89	32.4%	8.10	1,246.96	404.31	842.65	9.4%	STANDARD
3	Fish and Chips	86	7.9%	5	9.99	2.52	25.2%	7.47	859.14	216.86	642.28	7.2%	PRIME
4	Philly Cheesesteak	67	6.1%	8	10.49	3.30	31.5%	7.19	702.83	221.17	481.66	5.4%	PROBLEM
5	Sandwiches #5	0			0.00	0.00	0.0%	0.00	0.00	0.00	0.00	0.0%	
6	Salmon Turnover	51	4.7%	11	11.99	3.64	30.3%	8.35	611.49	185.57	425.92	4.8%	SLEEPER
7	Mediterranean Chicken Wrap	121	11.1%	2	11.99	3.76	31.4%	8.23	1,450.79	454.88	995.91	11.2%	STANDARD
8	Chicken Sandwich	72	6.6%	7	12.99	4.44	34.2%	8.55	935.28	319.74	615.54	6.9%	STANDARD

Enter the number in the first column on the left after the item name (below). Popularity data will be displayed showing each items **% of total** ordered and

ranking order.



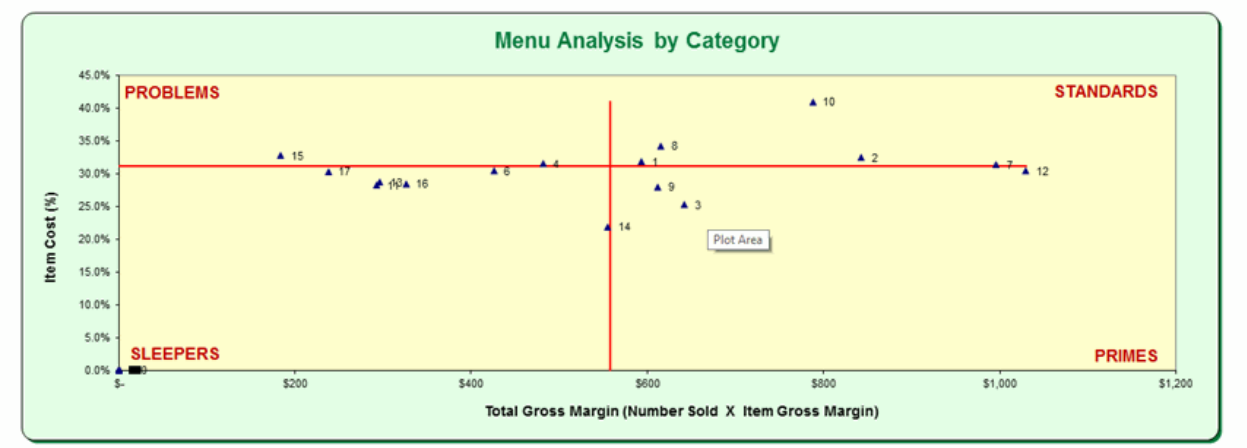
The **menu price**, **cost** and **cost %** and **gross profit** will already be present, but menu totals and ranking data will now be displayed based on the number of each item you sold for the period. The menu analysis category will also be displayed.



A graphical view of the above Table is a more effective way to see each item's performance relative to all other items in the same Category. Each item is placed on a graph with the X axis (horizontal) representing the **Total Gross Margin** of each Menu Item for the period (e.g. the number sold times the item's gross profit). The Y axis (vertical) plots the **Food Cost %** of each item. The "best" items are the **PRIMES**, those that produce high gross profit dollars and low food cost %, and conversely the **PROBLEMS** generate relatively low gross profit dollars, and do so at a corresponding high food cost %. **STANDARDS** identify menu items that generate high gross profit dollars but do so at a relatively higher food cost % than

the Primes. **SLEEPERS** are menu items with low food cost %, but because they are not popular, are not high gross profit generators.

Cross reference each item's number to the Table above, and **click on the item's name to navigate back to its Recipe Cost template**. Use this information to proactively manage the menu mix (popularity), selling price and item costs within each Menu Section. This is the most powerful and direct way to increase your restaurants overall profitability. Promote those items that make you money, deemphasize those that do not. Re-price or re-cost other menu items to optimize your overall profitability



The decision "matrix" below is another way to evaluate each items ranking and proactively take steps to improve overall profitability.

Cost Margin Analysis (Pavesic)

Decision Matrix

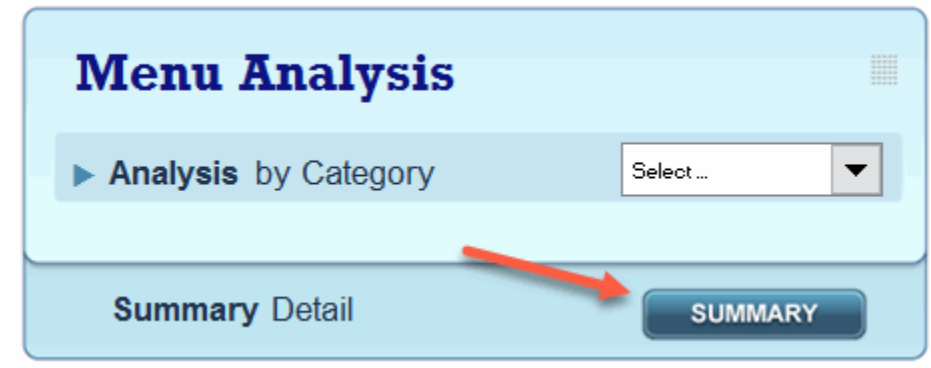
	PRIMES	STANDARDS	SLEEPERS	PROBLEMS
Option 1	Keep menu item as is	Reduce cost by retooling recipe	Promote menu item by suggestive selling or menu placement	Delete menu Item
Option 2		Increase price	Decrease price	
Option 3		Do nothing	Do nothing	
Option 4		Delete menu item	Delete menu item	

Export the information to a new Excel spreadsheet by clicking the **EXCEL** button shown below. This will allow you to perform "**what if**" analysis by easily editing the number sold, selling price, cost and cost % of each item without changing the

data in the actual menu template. Now you can see the impact of a these changes on the bottom line under a variety of scenarios that you can control.



After performing menu analysis on the entire menu (or selected menu categories), you can view a Summary of the data by selecting the **SUMMARY** button as shown below.



Data for all menu categories will be displayed with additional financial information including the **Theoretical or Ideal Cost %** of the entire menu. This is the cost % you would expect assuming that every item is entered into the POS system and there is no waste. Compare to your actual cost % (from your accounting system) to determine how close you are to where you should be.

For the Period: **February 2017** *(select text box and manually enter time period)*

Menu Category	Selling Price	Item Cost	Cost %	Gross Profit	Number Sold	Total Sales	% Total Sales	Total Cost	% Total Cost	Total Profit	% Total Profit
Appetizers	12.58	3.51	27.9%	9.07	2,200	27,677.00	19.4%	7,718.57	19.3%	19,958.43	19.5%
Sides & Salads	6.74	1.60	23.8%	5.14	2,400	16,183.00	11.4%	3,847.34	9.6%	12,335.66	12.0%
Entrees	22.36	6.43	28.8%	15.93	3,000	67,070.00	47.1%	19,291.14	48.1%	47,778.86	46.7%
Sandwiches	11.87	3.69	31.1%	8.18	1,090	12,942.60	9.1%	4,022.97	10.0%	8,919.63	8.7%
Beverage	0.00	0.00	0.0%	0.00	0	0.00	0.0%	0.00	0.0%	0.00	0.0%
Kids Menu	6.68	1.63	24.4%	5.05	800	5,342.00	3.7%	1,304.03	3.3%	4,037.97	3.9%
Desserts	7.30	2.16	29.6%	5.14	800	5,842.00	4.1%	1,728.03	4.3%	4,113.97	4.0%
Add Ons	9.25	2.69	29.1%	6.56	800	7,400.00	5.2%	2,154.81	5.4%	5,245.19	5.1%
Available 1	0.00	0.00	0.0%	0.00	0	0.00	0.0%	0.00	0.0%	0.00	0.0%
Available 2	0.00	0.00	0.0%	0.00	0	0.00	0.0%	0.00	0.0%	0.00	0.0%
TOTAL:			28.1%		11,090	142,456.60	100.0%	40,066.89	100.0%	102,389.71	100.0%

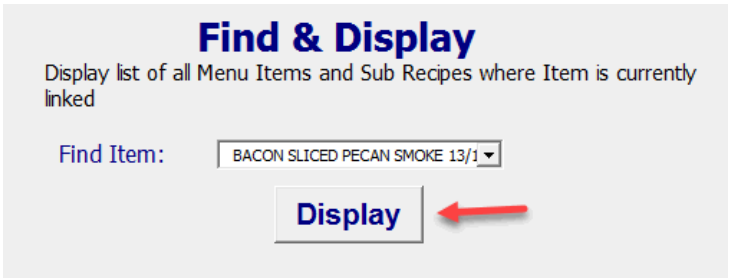
*Ideal Menu Cost %

Other EZchef Features

Find & Display

It's easy to see every menu item and sub recipe where a specific inventory item has been used. Often referred to as "**product utilization**", you can display a list of each menu category; and associated menu items and/or sub recipes, where that inventory item has been linked. From each of the Inventory sheets click the **Find and Replace** button, then select the inventory item from the "**Find and Display**" section.



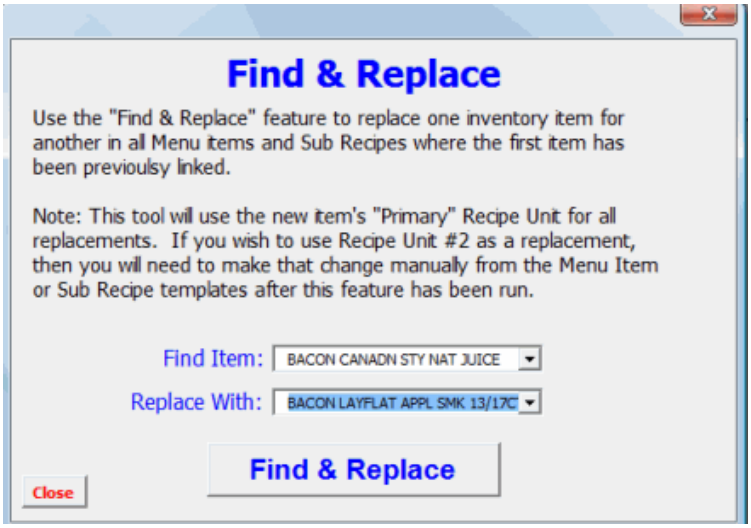


BACON SLICED PECAN SMOKE 13/17

Menu Category	Item Name
Sides & Salads	Tropical Cobb - Small
Sides & Salads	Tropical Cobb - Regular
Sandwiches	Salmon BLT
Sandwiches	Turkey BLT
Sandwiches	Chicken Sandwich
Sandwiches	BLT

Find & Replace

Do you want to replace an existing inventory item in all the menu items and sub recipes that currently use that linked item? Whether it's a permanent or temporary replacement, it's simple to substitute inventory items without manually replacing each item in every template where it's presently linked. Click the **Find & Replace** button, and select the item that you want to replace from the drop down window. Next select its replacement item from the window below. EZchef will do the rest, and display the number of times the replacement has been made.

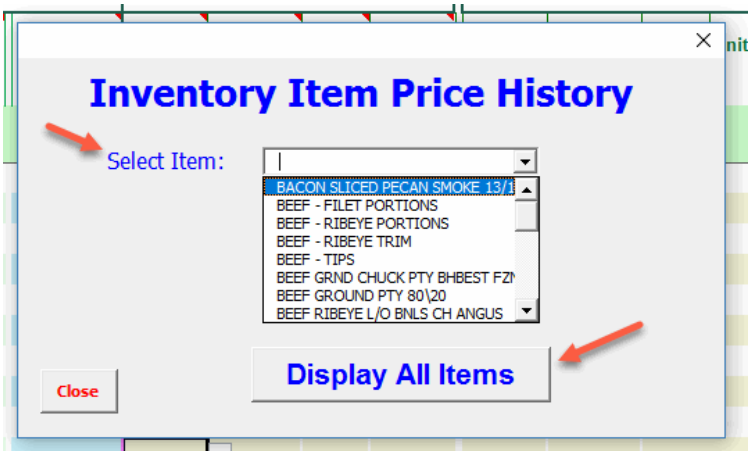


Price History

You can easily track historic price changes for all your food and beverage items. Whether you want to track a single item or all items, the process is EZ. Select the **Price History** button in the header of each Inventory sheet. and then choose whether you want the history of a single item or all items in that product category.



Now choose whether you want the history of a single item or all items in that product category.



For a single item…

Price History Report by Inventory Item:

BACON SLICED PECAN SMOKE 13/17
2 / 10 LB

Date	Price
February 2, 2017	95.92
February 24, 2017	93.12

For all items in an inventory category…

Price History by Category:
Meat & Poultry

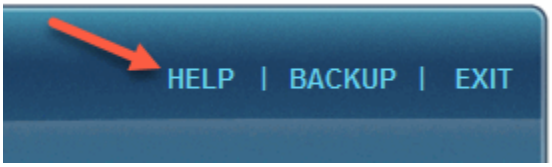
Clear Price History

Item Name	Pack #/Size	Price	Date	Price	Date
BACON SLICED PECAN SMOKE 13/17	2 / 10 LB	95.92	2/2/17	93.12	2/24/17
BEEF - FILET PORTIONS	EACH	7.10	2/2/17	8.02	2/24/17
BEEF - RIBEYE PORTIONS	EACH	9.50	2/2/17	9.67	2/24/17
BEEF - RIBEYE TRIM	#	6.50	2/2/17	6.75	2/24/17
BEEF - TIPS	#	5.00	2/2/17	5.24	2/24/17
BEEF GRND CHUCK PTY BHBEST FZN	80 / 2 OZ	42.32	2/2/17	43.12	2/24/17
BEEF GROUND PTY 80\20	24 / 8 OZ	40.31	2/2/17	41.45	2/24/17
BEEF RIBEYE L/O BNLS CH ANGUS	3 / LGHT	9.23	2/2/17	9.67	2/24/17
BEEF RIBEYE L/O BNLS CH ANGUS	3 / HVY	8.63	2/2/17	8.94	2/24/17
BEEF STEAK PHILLY SIR BRKWY	38 / 5 OZ	61.00	2/2/17	63.25	2/24/17

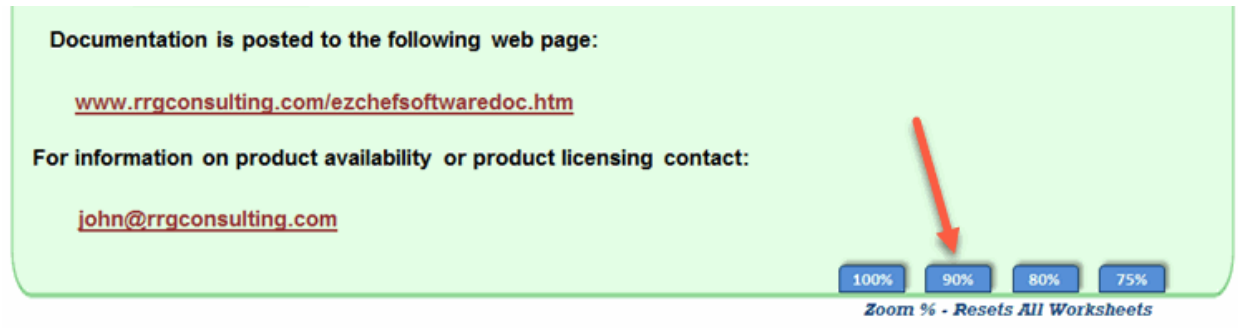
Zoom Feature

Based on the size of your computer screen you may want to increase or decrease the viewing size of the various screens within the program. For example, when using a Laptop you might want to "zoom out" to see more of each screen. While Excel has two ways of adjusting an **individual** screen view (either from the Ribbon (View…Zoom), or from the "slider bar" on the lower right corner of the screen), EZchef provides you with a simple way of adjusting **all** the screen views simultaneously.

To access this feature click on the **HELP** icon from any page view in the program.



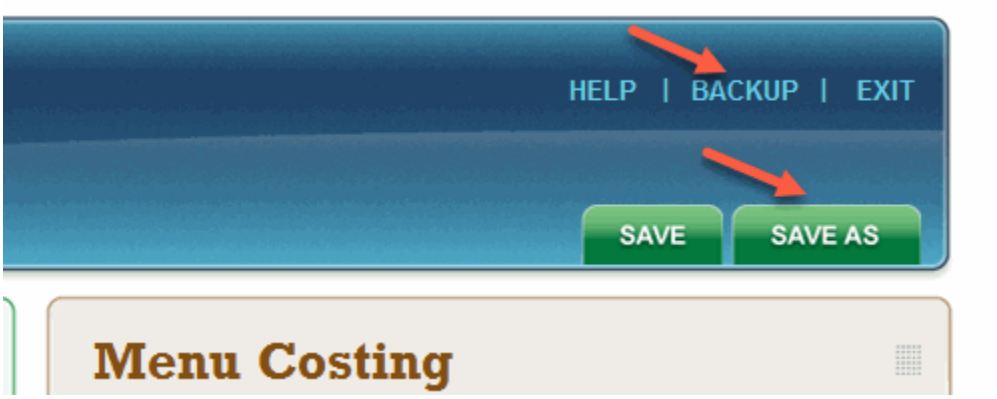
The default page view (Zoom) is set to **90%**. If you want to increase the page view select **100%**. To view more of the screen on your monitor select either **80%** or **75%**. Test the various views on your monitor and decide which is best for you.



File Maintenance

Many users simply **SAVE** their file after a working session with the program. This is not a recommended practice as it fails to create a backup of the data in the event that the file becomes corrupted or more typically, the user wants or needs to go back to a previous version.

The **SAVE AS** feature is a better alternative, especially when you "append" the file name with the current date (e.g. **EZchef Mar 5 2017.xlsm**.) Then, if there is a problem with current file, the user can always go back to the last file that was used.

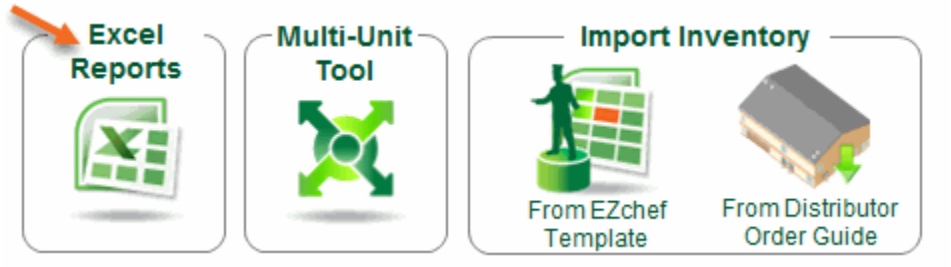


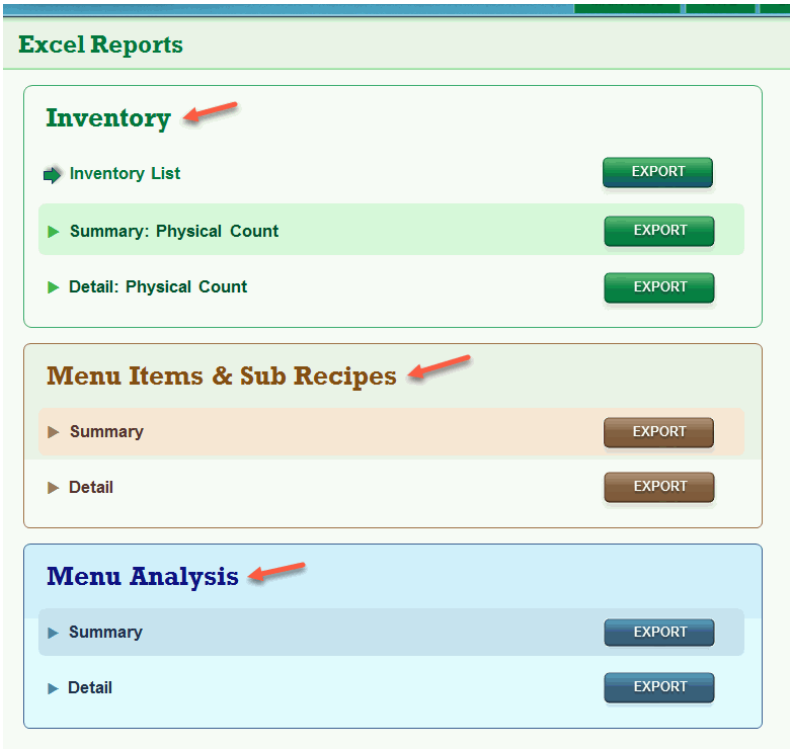
An even better method is the **BACKUP** option available from the **Main Menu**. When selected it creates a copy of the active file without having to leave the program. Simply click on the **BACKUP** feature and EZchef will create a **Date and Time "stamped" copy of your file**. It will save the Backup file to the same directory that your program file is located (e.g. your Desktop or a folder on your Desktop).

EZchef Reports

EZchef produces a variety of reports; the most commonly used are available from the **Main Menu** by selecting the **Excel Reports** icon. Most of these reports are also available from the sections of the program where they were created. As the name indicates, all reports are exported to a new Excel workbook, outside the program file. From there they can also be printed.

NOTE: By default each exported report will be saved to the same directory (and folder) where the program file is located. If your program file resides on the Desktop, then the exported file will be saved to the Desktop unless you edit the path prior to exporting.





Reports are divided into the three main sections of the program; **Inventory, Menu Costing and Menu Analysis**.