Contents

Getting Started .............................................................................................................................................. 1
Support ......................................................................................................................................................... 5
Management Access to Crunchtime .......................................................................................................... 5
Finding Answers to Your Questions ........................................................................................................ 5

https://bohsupport.fiveguys.com .................................................................................................................. 6
NetChef Help ................................................................................................................................................ 6
Training in FGU ............................................................................................................................................. 7
Current training available in FGU for Crunchtime and Brink .................................................................... 7
Essential Navigation Functions in Crunchtime ............................................................................................ 7

Net-Chef Dashboard .................................................................................................................................... 8
Today’s Tasks ................................................................................................................................................ 8
Tasks that you will see on the task list ......................................................................................................... 8
Performance metrics .................................................................................................................................... 10
Quick Links, Tile Reports, and Daily News .................................................................................................... 10
Daily Tasks .................................................................................................................................................... 10
Weekly Tasks ................................................................................................................................................ 11

Inventory Management ............................................................................................................................... 12
Inventory Overview ....................................................................................................................................... 12
Physical Inventory ........................................................................................................................................ 12
Quick Links .................................................................................................................................................. 13
Adjustments ................................................................................................................................................ 13
Location Transfers ........................................................................................................................................ 13

Rules of Crunchtime Inventory .................................................................................................................. 13
Steps to Get Started using Crunchtime Inventory ..................................................................................... 14

Configuring Your Count Sheets ................................................................................................................ 16
Update Storage Locations .......................................................................................................................... 16
Update Storage Sequences .......................................................................................................................... 17
Update Alternate Count Units ..................................................................................................................... 18

Counting and Entering Inventory ............................................................................................................... 18
Printing a Count Sheet .................................................................................................................................. 18
Entering an Inventory Count ......................................................................................................................... 19

Reviewing your count: ................................................................................................................................ 20

Common Inventory Issues, Questions, and Resolutions ............................................................................. 21
How do I complete a mid-week count?........................................................................... 21
What is book value? ........................................................................................................... 22
Where can I find a usage variance report, like what was offered in Red Prairie? .......... 22
What makes my book value look crazy?........................................................................... 22
What should I do before posting an inventory period? .................................................. 22
Purchasing .......................................................................................................................... 23
Purchasing Dashboard ....................................................................................................... 23
**Configuring your Vendor Orders and Delivery Schedules** ........................................... 23
Steps................................................................................................................................... 23
Creating a Vendor Order .................................................................................................. 24
Tips before getting started ............................................................................................... 24
The Process ....................................................................................................................... 24
Reconcile a Vendor Order ................................................................................................. 25
Reconciliation Tips and Suggestions ............................................................................... 26
Vendor Credits and Returns ......................................................................................... 28
Sales and Forecast Management ................................................................................... 29
Recent Sales Transactions ............................................................................................... 29
Cash Deposits .................................................................................................................. 29
Forecast Review .............................................................................................................. 30
Labor Management ........................................................................................................ 32
Labor Dashboard Overview ............................................................................................. 32
New Employees and Editing Employees ....................................................................... 32
Point of Sale Setup .......................................................................................................... 34
Terminating Users ......................................................................................................... 34
Rehiring Users ................................................................................................................. 34
Reviewing and Editing Time Punches ........................................................................... 34
Time and Labor Reporting .............................................................................................. 35
Staffing Level Templates ............................................................................................... 35
Demand Based Template ............................................................................................... 36
Task Based Templates .................................................................................................... 38
Creating Schedules ........................................................................................................ 39
Scheduling in Net Chef ................................................................................................... 39
Teamworx Scheduling ................................................................................................. 42
Overview ......................................................................................................................... 42
Logging in ......................................................................................................................... 42
<table>
<thead>
<tr>
<th>Function</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Essential Teamworx Functions</td>
<td>43</td>
</tr>
<tr>
<td>Daily Roster</td>
<td>43</td>
</tr>
<tr>
<td>Managing Schedules</td>
<td>43</td>
</tr>
<tr>
<td>Employee Tasks</td>
<td>44</td>
</tr>
<tr>
<td>Staff Requests</td>
<td>45</td>
</tr>
<tr>
<td>Message Center</td>
<td>45</td>
</tr>
<tr>
<td>Employee List</td>
<td>45</td>
</tr>
<tr>
<td>Open Shifts</td>
<td>45</td>
</tr>
<tr>
<td>Manage Blackout Dates</td>
<td>46</td>
</tr>
<tr>
<td>Production – Prep Worksheet</td>
<td>47</td>
</tr>
<tr>
<td>Prep Worksheets</td>
<td>47</td>
</tr>
</tbody>
</table>
Getting Started

This section will give you some useful info on getting started. Be sure to review this entire manual and reference it any time you are having trouble in Crunchtime. This manual covers all steps related to setup and daily use of purchasing, inventory, and labor management in Crunchtime.

Net Chef URL: https://fiveguys.net-chef.com/
Teamworx URL: https://fiveguys.ct-teamworx.com/

Support
Please contact BOHSupport@fiveguys.com with any questions or issues related to Crunchtime. Do not contact support agents directly via their personal email. Sending all questions or issues to BOHSupport@fiveguys.com will ensure the agent best equipped to handle the case gets that case assigned – resulting in faster resolution for you.

BOH Support can also help with Brink questions and issues not related to the POS hardware. If you are having a problem with the POS hardware, including Verifone credit devices, please contact the Par/Brink help desk at 1-800-458-6894.

Please check out the available information resources prior to contacting support, you might find the answer or resolution to your problem without having to contact support (more details below).

Support Channels:
• Crunchtime/Net Chef/Teamworx: BOHSupport@fiveguys.com
• Par/Brink Tech Support: 1-800-458-6894 or Support@brinksoftware.com
• Verifone Help: 1-800-458-6894 or Support@brinksoftware.com
• FGU: FGUSupport@fiveguys.com
• Firewall: Please contact your firewall provider directly.
• Merchant Processing: Please contact your processor directly.
• Online Ordering: help@olo.com
• Food Vendor Issues not related to electronic invoicing in Crunchtime: Contact the vendor directly.

Management Access to Crunchtime
To setup a new management account for Net Chef or Brink portal access, please use the request form (http://goo.gl/forms/tYizCmBNHf) and we will complete the request in 1 business day.

• If you do email support directly with a request, a general reply requesting that you complete the form will be posted. This is to keep support clear for larger issues and the form also contains needed information to create the accounts.

• If you already have a location using Crunchtime, you can contact support with the names of the people that need the location added to their profiles in either Crunchtime and/or Brink.

Finding Answers to Your Questions
Did you know that there are multiple places available to find information and help on Crunchtime and Brink functions? We have a help site setup with information on Crunchtime and Brink at https://bohsupport.fiveguys.com. This site contains documents, articles, links, and FAQs. Additionally, this site is mobile optimized for easy access from your phone.
Another great Crunchtime resource is the help center built directly into the Net Chef application. You can click on the question mark in the top right area of the navigation bar to get help with the screen you are currently on.

The goal with these resources and FGU is to give you what you need to be able help yourself find answers to your questions quickly and easily. If you cannot find an answer to your question or problem, please contact BOHSupport@fiveguys.com.

https://bohsupport.fiveguys.com
Training in FGU
For anyone that has not completed the training in FGU, we strongly encourage that you take the time to complete this training as it will help you to better understand Crunchtime and Brink (if you have the Brink POS). If you have already completed the training but find yourself still having trouble grasping any areas of the system, we recommend retaking those particular lessons.

You can self-enroll in the training by going to course area of FGU and selecting the Crunchtime and Brink POS category. For any questions or issues related to FGU, please contact FGUSupport@fiveguys.com directly.

Current training available in FGU for Crunchtime and Brink
CT100: Crunchtime! New User Orientation
- Crunchtime New User Orientation

CT101: Crunchtime! Management Essentials
- Net Chef Main Dashboard
- Purchasing: Creating Vendor Orders
- Purchasing: Reconciling Vendor Orders
- Inventory: Dashboard Overview
- Inventory: How Inventory is Calculated (what’s different)
- Inventory: Reviewing Your Counts
- Inventory: Where is my GP?
- Inventory: Reporting Part 1, Actual vs Theoretical Cost Report
- Inventory: Reporting Part 2, Further Analysis and P&L Reports
- Sales: Part 1 – Dashboard Overview and Entering Bank Deposits
- Sales: Part 2 – Reviewing Sales Forecasts
- Production: Creating Prep Worksheets
- Labor: Dashboard and Key Reports
- Labor: Reviewing Employee Time Punches
- Labor: Employee Maintenance
- Labor: Creating Schedules in Teamworx
- Administration: Posting Inventory and Labor

Essential Navigation Functions in Crunchtime
Throughout the Net Chef application, there are navigation options which help optimize your experience. Below is a list of the essentials.

- expand to see more information.
- filter the information on the page. Sometimes default filters are in place, you can use this to expand or change those filters to expose more data.
- export the information on the page to PDF, Excel, or CSV.
- Crunchtime Help Center. You can click on this icon from any screen and the system will open a new tab in your browser with help information about the page you are on. It will also allow and help guide you to other useful help articles.

- Logout. This should be used to properly log out of the system. Best practice

- If you hover over a column head and see a down arrow, you can click the down arrow to add or remove columns. It also means that you can move columns to fit your preferences by dragging and dropping. You can also sort the data in ascending or descending order.

### Net-Chef Dashboard

The first page that loads when you log into Net-Chef is the dashboard. The dashboard contains gadgets which display daily task lists, performance metrics, and quick links to useful documents and pages.

#### Today’s Tasks

The most important area for a manager in Net-Chef is the Today’s Tasks section. This gadget contains a list of all tasks that the manager needs to complete, along with a date the task is due. The goal is to have no tasks more than 24 hours past the due date. Once a task becomes overdue the due date turns red.

<table>
<thead>
<tr>
<th>Task Type</th>
<th>Description</th>
<th>Due Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Labor Actuals - Not Reviewed</td>
<td></td>
<td>07/21/2015</td>
</tr>
<tr>
<td>Inventory Review</td>
<td>Daily Count</td>
<td>07/21/2015</td>
</tr>
<tr>
<td>Enter Bank Deposit</td>
<td>GM Manager-Salary</td>
<td>07/22/2015 11:00</td>
</tr>
<tr>
<td>Vendor Order Receive</td>
<td>BOSS : Gold Cust Bakery</td>
<td>07/22/2015</td>
</tr>
<tr>
<td>Labor Actuals - Not Reviewed</td>
<td></td>
<td>07/22/2015</td>
</tr>
<tr>
<td>Inventory Count</td>
<td>Daily Count</td>
<td>07/22/2015</td>
</tr>
<tr>
<td>Sales Forecast - Not Complete</td>
<td></td>
<td>07/27/2015</td>
</tr>
</tbody>
</table>

Tasks that you will see on the task list

**Labor Related Tasks**

- **Labor actuals not reviewed** – this is a daily task that will show up signifying that you need to review the time punch records for the specified date. The task will automatically go away once ALL of the time punch records for that day have been reviewed.

- **Missing Labor Actuals** – if you see this message, it mean that the system is expecting to receive time punch details for the day listed but did not receive any. If there were no time punch records for the date listed, you can ignore this message and it will go away once you post labor. If you do have time punch records for that day, then contact BOHSupport@fiveguys.com to help troubleshoot.
- **New Stores!** You will see this task for days prior to your location actually having time punches on the POS. These tasks will go away once you post the labor periods the alerts are contained within.

- **Conversion Stores!** You will see this task for days prior to your conversion to Crunchtime. These tasks will go away once you post the labor periods the alerts are contained within.

- **Post labor** – this task will show up once per week after the week has ended. Posting labor signifies that you have reviewed all of the time punches for the week and no further edits will be made or need to be made. All time punch records must be reviewed in order for you to be allowed to post labor for the week. Once you post labor, the records will be locked and can no longer be edited.

### Inventory Related Tasks

- **Inventory Count** – this task signifies that an inventory count is due. You can click on this task to take you to the data entry page. This task will go away once you proceed to the review step in the inventory process.

- **Inventory Review** – this task signifies that an inventory count has been entered into the system, but the review step in the inventory process has not been completed. Once you select “Save and Complete” in the review process, this task will go away.

- **Missing Menu Mix File** – this task signifies that a menu mix file was not received for the specified date. Menu mix files contain information on all products sold for a given date and are important in determining theoretical usage and your book value. If the location was not open for business on the date listed or did not yet have Crunchtime, you can ignore the task – it will go away automatically once you post the inventory period that it is contained within.

  - **New Stores!** You will see this task for days prior to your location actually having transactions on the POS. These tasks will go away once you post the inventory periods the alerts are contained within.

  - **Conversion Stores!** You will see this task for days prior to your conversion to Crunchtime. These tasks will go away once you post the labor periods the alerts are contained within.

- **Post Inventory** – this task signifies that all required inventory counts have been reviewed and completed and the inventory period is ready to post. Posting inventory should only be done once you have reviewed all of the data and you are positive there are no mistakes that need to be corrected. Once you post inventory, you will not be able to make edits to invoices or the final for post count. You can click on the task and it will trigger the posting process; follow the prompts on the screen to complete.

### Purchasing Related Tasks

- **Create Vendor Order** – This task signifies that you have a vendor order due to be placed in the system, based on the ordering and delivery schedule you have specified in the vendor profiles area. You can click on the task and it will take you create the order for the vendor.

- **Vendor Receive or Reconcile Vendor Order** – this task signifies that an order is ready to be reconciled in the system. You can click on the task after the order physically arrives in the location to reconcile the order in Crunchtime.

### Sales Related Tasks

- **Sales Forecast Not Complete** – This task signifies that you have not reviewed the sales forecast. Crunchtime will not provide sales forecast tools until you have reviewed the forecast. You can click on the link and the system will take you to the forecast that needs to be reviewed. Once you have successfully reviewed the forecast, this task will be marked complete.
• **Missing Sales Mix File** - this task signifies that a sales mix file was not received for the specified date. Sales mix files contain information sales information for a given date. If the location was not open for business on the date listed or did not yet have Crunchtime, you can ignore the task – it will go away automatically once you post the inventory period that it is contained within.
  - **New Stores!** You will see this task for days prior to your location actually having transactions on the POS. These tasks will go away once you post the inventory periods the alerts are contained within.
  - **Conversion Stores!** You will see this task for days prior to your conversion to Crunchtime. These tasks will go away once you post the labor periods the alerts are contained within.

**Performance metrics**

The performance metrics gadget displays store performance figures from the current week such as actual net sales, forecasted sales, actual labor, labor percentage of net sales, etc. As with many of the gadgets in Net-Chef, this section is also customizable to display metrics of specific importance to your organization.

*The data in this gadget is only updated once per day overnight. It is designed to give you recent KPI information to help in making business decisions for the current day. You can only view data for the current week and the previous week with this gadget.*

<table>
<thead>
<tr>
<th>Metric</th>
<th>Monday 05/11/2015</th>
<th>Monday 05/12/2015</th>
<th>Monday 05/13/2015</th>
<th>Monday 05/14/2015</th>
<th>Monday 05/15/2015</th>
<th>Monday 05/16/2015</th>
<th>Monday 05/17/2015</th>
<th>Week-to-Date</th>
<th>Period-to-Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Actual Net Sales</td>
<td>$2,279</td>
<td>$2,311</td>
<td>$2,311</td>
<td>$2,306</td>
<td>$2,306</td>
<td>$2,306</td>
<td>$2,306</td>
<td>$4,975</td>
<td>$38,147</td>
</tr>
<tr>
<td>Forecasted Sales</td>
<td>$3,363</td>
<td>$3,531</td>
<td>$3,531</td>
<td>$3,531</td>
<td>$3,531</td>
<td>$3,531</td>
<td>$3,531</td>
<td>$7,006</td>
<td>$51,018</td>
</tr>
<tr>
<td>Actual Labor</td>
<td>$497</td>
<td>$479</td>
<td>$479</td>
<td>$479</td>
<td>$479</td>
<td>$479</td>
<td>$479</td>
<td>$976</td>
<td>$6,284</td>
</tr>
<tr>
<td>Labor % of Net Sales</td>
<td>21.81%</td>
<td>20.71%</td>
<td>20.71%</td>
<td>20.71%</td>
<td>20.71%</td>
<td>20.71%</td>
<td>20.71%</td>
<td>21.20%</td>
<td>16.47%</td>
</tr>
<tr>
<td>Last Week Actual Net Sales</td>
<td>$2,374</td>
<td>$1,301</td>
<td>$2,430</td>
<td>$2,491</td>
<td>$3,357</td>
<td>$3,567</td>
<td>$3,769</td>
<td>$3,675</td>
<td>$17,656</td>
</tr>
<tr>
<td>Total Cash Over/Shorts</td>
<td>($6.63)</td>
<td>($797.30)</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>($797.53)</td>
<td>($764,78)</td>
</tr>
<tr>
<td>Scheduled Hours</td>
<td>54.50</td>
<td>50.00</td>
<td>53.50</td>
<td>53.00</td>
<td>71.00</td>
<td>79.75</td>
<td>81.00</td>
<td>103.50</td>
<td>80.70</td>
</tr>
</tbody>
</table>

**Quick Links, Tile Reports, and Daily News**

Under performance metrics you will see the Quick Links, Tile Reports, and Daily News gadgets. Quick links provides you with fast access to other useful Five Guys sites and documents. Tile Reports provides you with additional sales and performance metrics. Daily News contains potato board information as well as any important announcements pushed out from Five Guys Corporate.

**TIP!** You can recalculate the information on the dashboard by clicking the green Recalculate Dashboard button in the top right corner. 🔄

**Daily Tasks**

The best way to see what needs to be done in Net-Chef is to check your to-do list on the dashboard when you first log in. **The goal every day is to have no tasks that are more than 24 hours overdue.** Most of the
tasks on the dashboard are actionable, meaning you can click on them and they will take you to the area where you can complete the task.

Common daily tasks include:

1. **Labor review**
   a. This should always be done next day. In this step you review all time punches for accuracy. Do not mark as reviewed unless you have verified all punches are accurate.

2. **Entering cash deposits from the previous day (not on the dashboard by default)**
   a. You can setup a reminder task for this step in the schedule template area.

3. **Counting inventory**
   a. Daily counts are not mandatory. Weekly counts however are very important to ensure accuracy at the end of every inventory period.

4. **Placing vendor orders**
   a. This is based on your order schedule. For many vendors, you can order directly through Net-Chef. When your store is first set up you should double-check with your vendors to confirm they are receiving your orders.

5. **Receiving vendor orders**
   a. This needs to be done once an order has been delivered. Do not wait to do this.

### Weekly Tasks

In this section we will cover the weekly tasks to complete in Net-Chef. Again, refer to your task list to see what needs to be done and try to have everything completed within 24 hours of the due date.

Common weekly tasks include:

1. **Sales forecast review**
   a. Suggestions for inventory and labor will not function until this is reviewed. It is suggested that you review your forecast 2 weeks ahead of the actual week, then again at the start of that week.

2. **Schedule creation**
   a. Creating your schedule in Net-Chef is not a requirement, but does give your employees’ access to Teamworx if you do. Also, schedule validation on the POS is only possible if you create your schedule in Net-Chef or Teamworx.

3. **Weekly inventory counts**
   a. This is required for inventory reporting to function correctly. Counts are always completed at the end of every week and at the end of every month.

4. **Posting your most recent labor period**
   a. This allows an export to go to payroll for processing. Labor should only be posted once you have reviewed all time punches for the week and are 100% certain they are accurate.

5. **Posting your most recent inventory period**
   a. This should only be done once you are certain your purchases, ending inventory counts, and total numbers produced by those counts are accurate. Remember that you cannot proceed to the next inventory period without posting inventory for the current period.
Inventory Management

Inventory in Net-Chef is based on the cost of goods sold formula:

\[ \text{Beginning Counts (Final for Post)} + \text{Purchases} - \text{Ending Counts (Final for Post)} = \text{Cost of Goods Sold} \]

Counts are designed to be done at the end of the day in Net-Chef, so if you enter counts in the morning the date listed on the count will always be the previous day. The key reports in Net-Chef for inventory are based on the full weekly and monthly counts (final for post count) which are completed at the end of every inventory period. Final for post counts are due every Sunday night (can be done on Monday morning) and on the last night of every month (can be done on the first day of the month). This is a company configuration and cannot be modified by store or franchise group.

What about counts that are not Final for Post? A mid-period count can still be useful in managing variances on specific items because when you review the count, you will see the variance between the book value and what you counted. One important item to remember is that whenever you do a count, you essentially press the reset button on book value because the system will update the book value with the count value as of the date of the count.

Inventory Overview

To get started with the inventory application in Net-Chef, click on the Inventory menu at the top of the screen. This will bring up your inventory dashboard. Below are details of the gadgets listed on this page.

Physical Inventory

This area is dedicated to entering inventory counts and is organized by inventory post period. You can add in your counts directly from this gadget by clicking on Count Sheet in the process column. Note that the system will not allow you to skip counts, so be sure to complete all your counts on a daily basis. Selecting Count Sheet opens up a copy of the count sheet for printing. To see counts from previous periods just select a different Post Period from the drop-down on the top left.

Remember: Net-Chef assumes counts are performed at the end of the day. If you typically do your counts in the morning they will always show as being due for the previous day. If you enter your counts at night then the date will match.
Quick Links

<table>
<thead>
<tr>
<th>Actual Theoretical Cost</th>
<th>Consolidated Actual Cost</th>
</tr>
</thead>
<tbody>
<tr>
<td>Create Inventory Adjustment</td>
<td>Create Location Transfer</td>
</tr>
<tr>
<td>Create/Review Inventories</td>
<td>Profit &amp; Loss</td>
</tr>
</tbody>
</table>

This gadget gives you quick access to frequently used inventory tools and reports.

Adjustments

This area shows any adjustments made by your location. Adjustments will only update your book value and have no impact on actual usage number! Adjustments should only be used to account for product that has been discarded. It will not impact your cost of goods sold.

Location Transfers

This area shows any product transfers from one store to another. This will also display any items transferred to different storage locations within your store.

Rules of Crunchtime Inventory

1. The only counts that impact actual usage/cost are “final for post” counts.
2. Counts that are not “final for post” will only impact book value. Book value is what the system thinks that you have on hand at the time of the count. As an example, if you complete a count for
Five Guys CrunchTime User Manual

ground beef and the system thinks that you have 5 cases, but you say that you have 4 cases on your count, Crunchtime will adjust book value by 1.

3. You cannot skip counts.
4. You cannot complete counts in a period until the previous period has been posted.
5. Counts are designed to be done at the end of the day, which is why you see the previous date if you do your counts in the morning. This does not impact the system however.

Steps to Get Started using Crunchtime Inventory
If you are just getting started with Crunchtime, follow these steps! This section will cover the steps that you should follow to get started with Inventory in Crunchtime. Detailed instructions on some of the steps can be found in later sections of this manual and in the Crunchtime help center (click the question mark in Crunchtime).

1. Read the inventory sections in this manual.
2. Complete your training in FGU in the CT101 course.
3. Set your primary storage locations for products in the update storage locations area. Put the items that you do not wish to count in the non-cogs storage. This will put these items at the bottom of the count sheet.
   a. From the Inventory menu, click Update Storage Locations.
   b. You can use the tools at the top of the screen to filter the product list.
   c. If there are more than 50 products for the category/storage location selection, page navigation will display at the top and bottom of the listing. To move to another page, click on the page number or on the arrows ( << >> ).
   d. If a product or recipe has any files attached to it in Enterprise Manager, authorized users can click the Product Name to open the View Attachments pop-up window.
   e. To change the primary Storage Location for any product, select a different storage from the drop-down.
   f. The following location product information can be viewed or changed:
   g. Min Par - This indicates the smallest quantity (to 2 decimal places) of the product that should be on-hand at any given time.
   h. Max Par - This indicates the largest quantity (to 2 decimal places) of the product that should be on-hand at any given time.
   i. Inventory Cost – Price at which the on hand inventory is valued.
   j. Click the View Cost Changes link to open a window to view cost change details for the selected product.
   k. To print product labels, check the box in the Print Labels column for the appropriate products, then click the Labels button.
   l. Click Update to save your changes.
   m. A warning message will appear. Click OK to proceed or Cancel if more changes are needed.
   n. If necessary, click one of the Export buttons to save the screen data to a PDF or Excel file.
   o. When finished, click Close to exit the screen.
4. Update the organization of items on your count sheets in the update storage sequences area.
   a. From the Inventory menu, click Update Storage Sequences.
   b. Select a Storage Location from the drop-down.
   c. For each product, enter a Sequence number to indicate where it should appear on the inventory count sheet.
   d. Click Sequence to sort the products by sequence number.
e. Repeat steps 2-5 to sequence other storages.

f. If necessary, deselect the Active check box for a product to remove it from Inventory count sheets. For primary storages, this is allowed only if the Available quantity is '0'.

g. When finished, click Save & Exit.

h. When the confirmation message is displayed, click OK to exit the screen.

5. Print your count sheet from the physical inventory screen. Just select count sheet on the final for post count listed.

6. Review your count sheet to make sure it’s how you want it, revert back to steps 3 and 4 if you need to make changes.

7. Configure and test the purchasing area.

a. Set the vendor ordering and delivery schedule in the view vendor profile area. You don’t need to do this for the bakery because orders will still be placed on the BOSS system (the electronic invoice will automatically download the day of delivery).

b. If you are ready to order product, place an order with your broadline food distributor using the Net Chef application (US stores only – international locations should work with BOH Support on vendor configurations).

c. Verify that all needed products are listed in the order guide.

d. Call the vendor to ensure the order was received.

e. When the order arrives, reconcile the order in Net Chef. Verify the delivery date, pricing, and conversions are correct. If there are any problems with conversions, please correct and notify BOHSupport@fiveguys.com.

f. Reconcile bread orders as they arrive.

g. Be sure that all orders are reconciled before proceeding.

h. It is always a good idea to reconcile at least 1 of every item that you count before doing your first count because the inventory pricing is based on what is reconciled.

8. Bring your inventory post period current. Final for post counts are due every Sunday night (can be done on Monday morning) and on the last night of every month (can be done the morning on the first day of the month). Follow the below steps if your post period is not current. You will want the final for post count date to be the most recent date (or the current date if things line up).

a. Open the final for post count by selecting data entry.

b. Select by exception to place a 0 in all boxes.

c. Select Save and Review.

d. Select Save and close.

e. In the admin menu, select Post Inventory.

f. You might get warnings about missing menu mix data and others through the process, just select continue.

g. Proceed on to the next inventory period and repeat the process until you get to a final for post count that you would like to use for your first inventory count.

9. Enter your first final for post inventory count. This will serve as your starting point and count with inventory.

a. Select the data entry option.

b. You will see all items that the location receives, including items you do not normally count. They should be located in a non-COGS section if you followed step 3 correctly.

c. Enter you count data into the sheet. Pay close attention to the total column to make sure that everything is adding up properly. If something is not adding properly, email BOHSupport@fiveguys.com with the details. If you have a special alternate count unit, you can change the alternate count unit and conversion in the update count units area.
d. Once all of your count data has been entered, select by exception. This will place a 0 in all blank spaces – you are not able to post inventory with blank spaces on the count sheet.
e. Select save and review.
f. On the review page, take a moment to customize your view so that you see the information that you want and nothing else. Do this on each of the 3 tabs.
g. Review the totals on the physical quantity for accuracy – this is your ending count data that you just entered.
h. Check the value tab to ensure the values look correct. If something is not correct, then something was missed in the purchasing process. You can click on the price hyperlink of each item to see a history of price changes. Select save and close, then go to the purchasing area to ensure proper pricing and conversions for the items identified with problems. Once they have been corrected, go back to the count, select review, then edit, then by exception, then save and review. This will refresh the data on the review page.
i. Once everything looks good, select save and close.
j. Post inventory.
k. Begin a normal inventory process.
  i. Reconcile orders on time with the correct delivery date.
  ii. Enter final for post counts accurately and on time.
  iii. Use the actual theoretical cost report to review your numbers before posting.
l. You can do non-final for post counts to manage certain items on a daily or semi-daily basis. These counts do not impact the actual usage numbers because they are not final for post; they only update the book value through the week. These counts do help fine tune inventory because you still follow the normal review process – allowing you to see variances based on book value and the count.

Configuring Your Count Sheets

Update Storage Locations

The Update Storage Locations screen allows a user reassign a product’s primary storage location. Users can also update a product’s ordering status, set the location’s Min and Max Par levels, and print product labels.

Changing the primary storage will transfer the products from the old storage location to the new one. To add a product to the inventory of a storage location without changing the primary storage, add it to the sequence of the new storage.

1. From the Inventory menu, click Update Storage Locations.
2. You can use the tools at the top of the screen to filter the product list.
3. If there are more than 50 products for the category/storage location selection, page navigation will display at the top and bottom of the listing. To move to another page, click on the page number or on the arrows ( << >> ).
4. If a product or recipe has any files attached to it in Enterprise Manager, authorized users can click the Product Name to open the View Attachments pop-up window.
5. To change the primary Storage Location for any product, select a different storage from the drop-down.
6. The following location product information can be viewed or changed:
- **Min Par** - This indicates the smallest quantity (to 2 decimal places) of the product that should be on-hand at any given time.
- **Max Par** - This indicates the largest quantity (to 2 decimal places) of the product that should be on-hand at any given time.
- **Inventory Cost** – Price at which the on hand inventory is valued.

7. Click the View Cost Changes link to open a window to view cost change details for the selected product.

8. To print product labels, check the box in the *Print Labels* column for the appropriate products, then click the Labels button.

9. Click **Update** to save your changes.

10. A warning message will appear. Click **OK** to proceed or **Cancel** if more changes are needed.

11. If necessary, click one of the Export buttons to save the screen data to a **PDF** or **Excel** file.

12. When finished, click **Close** to exit the screen.

**Update Storage Sequences**

The *Storage Sequence* screen is used to arrange products on count sheets and the inventory screen according to their positions in their storage locations. This feature can increase the efficiency of taking physical inventory.

If a product is kept in more than one storage location, it can be added to the sequence of any number of storages. This allows the product to be counted in multiple storages without changing the primary storage.

1. From the *Inventory* menu, click **Update Storage Sequences**.

2. Select a **Storage Location** from the drop-down.

3. For each product, enter a **Sequence** number to indicate where it should appear on the inventory count sheet.

4. Click **Sequence** to sort the products by sequence number.

5. Repeat steps 2-5 to sequence other storages.

6. If necessary, deselect the **Active** check box for a product to remove it from Inventory count sheets. For primary storages, this is allowed only if the Available quantity is '0'.

7. When finished, click **Save & Exit**.

8. When the confirmation message is displayed, click **OK** to exit the screen.

*Note:* To insert a product into the sequence between two other sequenced products, enter a decimal sequence number that falls between the numbers of the two products. For example, to add a product to the sequence between items currently numbered 4 and 5, enter a sequence number of 4.1, then click the **Sequence** button. This will make the new product number 5, move the previous number 5 to number 6, and reassign all subsequent products accordingly. There is no need to reassign each of the sequence numbers manually.
Update Alternate Count Units

Each location product has a primary Inventory Unit, but can be assigned up to three alternate count units if the product is going to be stored and counted in more than one package type. Alternate count units for location products can be set up in Net-Chef’s Update Count Units screen. For each alternate unit, a conversion factor must be entered to indicate how many of the alternate units are in one inventory unit.

1. From the Inventory menu, click Update Count Units.
2. In the Select Storage drop-down, choose a specific storage location or select "All".
3. If necessary, enter text in the Product Number, Product Name, Category or Inventory Unit column filter fields and press the Enter key to filter the product list.
4. To set the first alternate unit for a product, choose a package type from the first Alt Unit drop-down list. (Only Package Types designated in Enterprise Manager for "Inventory "use will available.)
5. Enter the Conversion (the number of alternate units in one inventory unit).
6. Repeat for the second and third Alt Units as needed.
7. Click Save & Close to exit the screen.

Example: Alternate Count Units

If beverages are most often delivered, stored and counted by the bottle, then BTL would be selected as the product’s primary inventory unit. However, a location may also want to count whole cases at the time of inventory. The location could set up CASE (CS) as an alternate unit, with a conversion factor of 0.083333 – in other words, 1/12 case is one bottle. If the total physical count was two cases plus six bottles, the total inventory quantity would be 30 bottles; the application uses the conversion factors to convert counts in alternate units, and the final counts are saved and displayed in the primary inventory unit.

Counting and Entering Inventory

This section will cover how to complete an inventory count along with a few tips and rules.

The inventory count functions can be accessed from two places: the inventory dashboard in the physical inventory gadget or in the create/review inventories area under the inventory menu. Either place will provide the same exact functionality and information.

Printing a Count Sheet

1. You will only see the options for count sheets and data entry for the days where counts still need to be completed. Remember, counts in Net-Chef are designed to be entered at the end of day, so if you do your counts in the morning you will see the previous date as being the date due for the count.
2. Select Count Sheet under the process column for the day you need the count sheet.
3. The count sheet will then be loaded. Click the printer icon in the top right corner. This will allow you to export the sheet to be printed. Just click the Export button at the bottom to download the sheet. Note: exporting to PDF is the best format for printing.

Entering an Inventory Count

1. Go to create/review inventories.
2. Select Data Entry under the process column for your final for post count. If you would like to add a mid-period count, select the option create new scheduled inventory and then select the template you would like to use for your mid-period count (remember: all non-final for post counts only impact book value, not actual usage or cost).

3. Enter the quantities recorded on your count sheet. Be sure to check the total column to ensure items are adding up as you expect.
4. For items that do not have a count amount just leave those blank.
5. Once you have entered all recorded items into your count sheet, select By Exception at the top. This will fill any blank spaces with zeros.
6. Select Save and Review if you are satisfied and would like to move on to the review process.
7. If you need to step away and finish adding the count later on, select Save and Close.

8. This will bring up a review report. This report should be reviewed for accuracy. If a problem is noticed, you can select Edit to bring you back to the data entry screen.

   When you review this page you should be focused on the physical column to ensure the count information that you just entered is accurate. Also, make sure to review the purchasing column to ensure that all purchases have been recorded and are accurate.

Reviewing your count:

Once you select save and review on your count, this will bring up a review report. This report should be reviewed for accuracy. If a problem is noticed, you can select Edit to bring you back to the data entry screen.

   When you review this page you should be focused on the physical column to ensure the count information that you just entered is accurate. Also, make sure to review the purchasing column to ensure that all purchases have been recorded and are accurate. Finally, use the value or the analysis tab to review the inventory unit pricing.

You’ll see there are 3 tabs at the top of this report: Quantity, Value, and Analysis.

1. **Quantity**: Displays inventory figures in terms of quantity for each item.
2. **Value**: Displays inventory figures in terms of monetary value for each item.
3. **Analysis**: Displays both quantity and value amounts. This is the most useful view once you get comfortable with viewing the numbers in Crunchtime.

**TIP!** The columns in these reports can be customized by hovering over the column header and clicking the drop down arrow on the right. This will allow you to add and remove columns. You can also change the order of the columns by dragging and dropping the column headers. The suggested ordering and columns are in the red box below.

It is not recommended that you have any other columns displayed as the information in those columns is NOT usable for the Five Guys method of inventory management.
Suggested columns and their definitions:

1. **Begin**: the actual quantity entered at the end of the last inventory period.
2. **Received**: the total quantities received by purchasing during the inventory period.
3. **Transfers**: the amount of product transferred to and from the location to another location.
4. **Adjustments**: adjustments made by the system based on counts that occur in the middle of the inventory period (any non-final for post count will cause numbers to show in the adjustments).
5. **Physical**: the ending count value; this is what you just entered from your recent count.
6. **Sold**: this is your theoretical usage for the inventory period.
7. **Book**: This is what the system thinks that you have on hand at the time of the count. The formula is begin + received + adjustments – sold.
8. **Variance**: this is the difference between book and physical.

Review Steps:

1. Ensure the accuracy of the physical and received columns in both the quantity and value views. You can view both at the same time by using the analysis view.
2. Once you are satisfied that the information is correct, select save and close.
   1. It is important that you are completely satisfied with the accuracy of the numbers in the received column and physical column. If something does not look correct, select edit to review the count and check your purchases in the purchasing area of Net-Chef. If all data is entered correctly but the numbers reported are not correct, please email BOHSupport@fiveguys.com with the details. Do not post inventory until you hear back from support.
   2. Any time you make a change to something in purchasing, be sure to edit the count entry, select by exception, then save and review, then save and close – the numbers will not update with the new purchasing data until this is complete.
3. The status on the physical inventory page for that specific count event will change to complete.
4. After completing the review, it is strongly encouraged that you run the Actual/Theoretical Cost report. This report shows your true costs and can help to highlight problems. Once you are happy with the accuracy of the numbers in this report, you can post inventory.

**Important Note:** Crunchtime inventory is Perpetual. Instead of only being based on a starting count, purchases, and ending count; it tries to keep a current inventory level, otherwise known as book value. The values that you are seeing in the adjustments is the system trying to adjust the book value based on the last mid period count. Purchases show based on the selected actual delivery date in the reconciliation process.

**Common Inventory Issues, Questions, and Resolutions**

**How do I complete a mid-week count?**

The only required counts are final for post counts. Further, final for post counts are the ONLY counts that are used in actual usage/cost calculations, so it is very important that you complete these counts properly. That being said, you can do a mid-period count by selecting "new scheduled inventory." Just be aware that these counts can only be used to update book value in the system. Note: counts either need to be performed or cancelled in order for the next one to appear.
What is book value?
Book value is what the system thinks that you have on hand currently or at the time of a count. It uses count data, purchasing data, and POS data to estimate on-hand values.

Where can I find a usage variance report, like what was offered in Red Prairie?
Crunchtime manages inventory differently than Red Prairie, as Book Value and "Final for Post" counts play a huge role. When you review a count, the review screen is very similar to a usage variance report. The difference is the comparison is between your count value and the book value. The actual/theoretical report can be used to compare actual versus theoretical values.

What makes my book value look crazy?
Completing mid-period counts (any count that is not Final for Post) that are not accurate or contain incomplete data. However, this should be checked when you review those counts. Any variance that you see in this review will show up in the adjustments column on a Final for Post count - because the system did an adjustment to the book value to match what you told it you had. Be sure that all vendor orders are reconciled on time and prior to completing any count.

Incorrectly reconciled invoices can also impact the value of inventory. It can also look funny if you are inconsistent with what you count.

What should I do before posting an inventory period?
Make sure you are confident in the accuracy of the numbers on the review step. Then run an actual/theoretical cost report on the same time frame, just to be sure everything matches expectations. If you find a problem that you cannot correct, email BOHSupport@fiveguys.com and do not post inventory until you get a reply from Support.
Purchasing

An essential part of inventory management is recording your food purchases. Net-Chef uses the purchasing menu for these transactions. Note that the steps in this section can also be used to manually add an invoice into the system if needed. This is important in the event that an electronic invoice does not make it into the system. Being able to manually add an invoice will help you to at least keep your inventory system up to date and accurate. **Be sure your pop-up block is off when using Net-Chef.**

Purchasing Dashboard

The purchasing dashboard has everything that you need to manage your vendor purchases. You can view recent orders and create new orders directly from this dashboard. You can get to this dashboard simply by clicking on the purchasing menu.

Configuring your Vendor Orders and Delivery Schedules

In Net-Chef, you have the ability to order and receive items for some vendors directly in the system. Configuring the orders and delivery schedules for your vendors will create actionable tasks on your task list.

**Steps:**

1. Make sure you are back on the Net-Chef homepage. Then, hover over the **Purchasing** menu and select **View Vendor Profiles**. This will bring up a list of vendors for your location.
2. Select **Edit** on the far right next to the vendor you would like to edit.
3. Under Order Day check the box for the days you make orders.
4. Enter the **Order by Time** (this field is automatically set to Eastern Standard Time) and select the Delivery Day.
5. Select **Save and Close**.
6. Repeat for all other vendors.

**Creating a Vendor Order**

Creating a vendor order is step one in the purchasing process. Most vendors are set up to receive orders from the Net-Chef system so in the following process you are actually placing your order directly with the vendor.

**Tips before getting started**

- You can get more details by clicking the expand icon in the top right.
- You can toggle between vendor units and inventory units by clicking the gear icon.
- Items are now separated by category. If you are having trouble finding an item, use the filter option to search the item.

**The Process**

1. Hover over the purchasing menu and select create vendor order. If you have your vendor order date and delivery schedule configured, you can simply click on the task on your to-do list. Select the vendor, the expected delivery date, and the number of consumption days you need the product ordered to last you. Then select continue.
2. Type in the quantity that you would like to order under the *order quantity* column.
   a. Other useful information included on this page are the amount on the last order, your 4 week average, the unit price, suggested order amount, vendor conversion, and the inventory unit.
3. Select add selected products once you have entered the order quantities.
4. Review the order quantities for accuracy and select prepare order.
5. Review one final time for accuracy and select submit to place the order. For vendors receiving orders directly from Net-Chef the order will be transmitted to the vendor at that point. You should confirm receipt with the vendor after placing the order in the first few orders placed from Net-Chef to ensure it was received and is accurate. **Be sure your pop-up blocker is off in this step.**

Note: If you are manually creating an invoice in the system, select the “do not transmit” box in the top right so the order is not sent to the vendor.

6. You can print a copy of the PO on the next screen if you would like. Otherwise select exit.

### Reconcile a Vendor Order

In order to add the items that you have ordered to your inventory, you need to reconcile the order. During this step, you will need to ensure that the quantities and pricing match what you actually received and the paper invoice.

1. Go to the purchasing dashboard and select **Reconcile** for the order you would like to receive into your inventory.
2. Select the actual delivery date. This should be the current date as you want to reconcile orders when they arrive. Then click **Continue**.

![Reconcile Vendor Order](image)

3. Ensure the quantities, conversions, and prices are accurate.
   a. In the reconciliation process, you should ensure that the proper conversion is in place for that product so your inventory values are properly updated upon reconciliation. If you find that a conversion is not correct, please adjust as needed AND notify **BOHSupport@fiveguys.com** with the details so that we can adjust things for future orders.

4. You can scan and upload your paper invoice by selecting attach files. This will keep the scanned version of the paper invoice tied to the digital record.

![Scan and Upload Invoice](image)

5. Select **Save**.
6. Until your next final for post inventory, you always have the ability to go back and edit your invoice reconciliation.

**Reconciliation Tips and Suggestions**

- Be sure the actual delivery date is accurate. This impacts inventory if the date is set incorrectly as your inventory values are updated based on the actual delivery date. As a best practice, reconcile your invoices when the order arrives.

- You can get more details by clicking the expand icon in the top right.

![Reconciliation Tips](image)

- Use the gear icon to change to toggle different product numbers and sorting of the view.
You can customize your view on the reconciliation screen. To do this, hover over one of the column headers, click the down arrow, and check the boxes of the columns that you want to see. You can also change the column sequence by dragging and dropping.

- Suggested columns in this order: Product number, product name, order quantity, unit price, invoice quantity, physical quantity, unit, conversion, inventory unit, invoice price, and invoice extended value.

The conversion and inventory unit columns are a great “check and balance” tool. You can ensure that the proper conversion is in place for that product so your inventory values are properly updated upon reconciliation.

- If you see that a conversion is not correct, make the appropriate correction and email BOHSupport@fiveguys.com so we can correct for future orders.

It's always a good idea to scan and upload the paper copy of the invoice, this way you always have a copy of the paper version associated with your digital record.
Vendor Credits and Returns

If there is ever a situation where you had to return or discard a product after receiving it and you will be getting a credit from the vendor you will need to use the vendor returns option.

1. Hover over the purchasing menu and select vendor returns.

2. Select the vendor and the return date.
3. Enter the credit number and amount.
4. Select look up invoice to pick a product from a particular invoice, otherwise select use last price.
5. Check the box for the item you are getting credit for and select add.

6. Select close.
7. Enter the quantity returned.
Sales and Forecast Management

The sales menu in Net-Chef includes many valuable functions such as reporting, bank deposits, total cash over/short, and sales forecasts. You can manage all of these functions directly from the sales dashboard, just click on the Sales menu on the top of the screen to go to the sales dashboard.

Recent Sales Transactions

The recent sales transactions dashboard contains important information regarding daily sales. The information on this screen can be customized to fit your needs by highlighting the column header and checking the boxes of the columns that you would like displayed. You can also change the column order using the drag and drop function.

![Recent Sales Transactions]

To display more or less information, click the filter icon in the top right and apply the appropriate filters. You can also print or export this information to excel by clicking the printer icon in the top right.

Cash Deposits

You have the ability to record your cash bank deposits in the recent sales transactions area of Net-Chef. It is important to note that you will need to enter deposits on the following day because sales data is still being imported for the current day and your work will be overwritten.

1. From the recent sales transactions area, select edit for the day that you need to add the deposit.

![Recent Sales Transactions]

2. Go to the bank deposits tab.

3. Enter the deposit value.

4. Under memo, enter the bag number and name of the person that made the deposit.
5. Select update.

6. Go to the totals tab.

7. Review that the total cash deposit number is correct.

8. Select save and close.

9. The recent sales transaction dashboard will update with the deposit and over/short amount.

Forecast Review
You can review forecasts from the sales dashboard or by selecting manage sales forecasts under the sales menu. It is important that your review your sales forecast at least once for future weeks so functions that use the forecast numbers report information. A weekly task to review the upcoming week forecast will show on the to-do list.

It is recommended that you review your forecast 2 weeks ahead of the actual week and once again the day the week starts to ensure the most recent data is included.

1. Hover over the Sales menu on the top and select Manage Sales Forecasts. Next, select the week that you would like to review.
2. This will load a detailed page of the forecast and the data used to generate the forecast. You can manually adjust the numbers if you know that you are going to be busier one of the days. You can also change the forecast algorithm used by selecting one of the check boxes for last week’s forecast, actuals for week ending, or 4 week average.

3. Once you are happy with the forecast, select **Save and Close**.
   a. Note that you can export or print the forecast using the PDF or Excel icon at the top of the page.

4. You can also see forecast performance by opening the forecast for the current or historical week and the actual sales will be displayed below the forecasted sales.
Labor Management

Labor Dashboard Overview
To access the labor dashboard click on the Labor menu. This will take you to the labor dashboard which contains all the essential gadgets used for labor management.

Note that CrunchTime refreshes its data from the POS every 15 minutes. If managing labor at tighter intervals you should use the POS for minute to minute reporting.

New Employees and Editing Employees
Note for corporate stores: new employees are imported into CrunchTime from HRIS. Conversion stores will have their initial list of employees imported from FGU so that duplicate profiles are not created.

1. New employees can be added into the system by hovering over Labor and selecting Employee Maintenance. This will display a list of all your employees. To add a new employee click the plus sign in the top right of the Employee Information window.
2. This will bring you to the Employee Information Screen. All fields highlighted in bold are required.
   1. Important fields to note:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee Number</td>
<td>Must be a number unique to the user. Use the 4 digit store number and the last 4 of the SSN.</td>
</tr>
<tr>
<td>Payroll ID Number</td>
<td>Must be a number unique to the user. This number will auto-populate.</td>
</tr>
<tr>
<td>Email Address</td>
<td>Required for access to Five Guys University. Must be unique to the user, do not allow users to share the same email address.</td>
</tr>
<tr>
<td>Language for FGU</td>
<td>Indicate language for FGU courses (English, Spanish, or French)</td>
</tr>
<tr>
<td>Existing FGU User Name</td>
<td>If the user has an active FGU account from another location enter their username to prevent duplicate accounts.</td>
</tr>
<tr>
<td>Existing FGU ID Number</td>
<td>This is important to prevent a duplicate account creating in FGU. Conversion stores will have their employees imported via data in FGU, so this will be populated for those. If someone transfers from a store that has the old BOH System, be sure to put the number in this field.</td>
</tr>
</tbody>
</table>

3. After selecting Pay Type (hourly/salary) a pop-up will load asking for primary position information. The most important fields in this menu are POS Code, Position, and Rate. POS code is the code they will use to clock in to the register. After you have finished entering this information click Save and Close.
4. Next, click **Update** at the bottom of the screen to save the information. If you click the Positions tab at the top you will notice that all the information from the Employee tab has been copied over.

5. The last section to update is the Employee Availability tab. From this tab you can establish employee availability which will be useful during the scheduling process. In this section you can establish preferred, available but not preferred, and not available times for the employee. This can be done for default weeks or any workweeks in the future using the drop-down menu on the left.

6. To add preferred times to the employee’s profile make sure the button is pressed next to the color code then click the cells corresponding to the times.
Point of Sale Setup
After the user has been set up in Net-Chef they will be uploaded to the register terminals (within 2 hours for Brink). Once the employee appears, you can establish the user’s pin number and enroll their fingerprint in the Manager Functions menu on the POS.

Terminating Users
1. To terminate a user hover over Labor and select Employee Maintenance. Click Edit next to the person’s name in the Employee Information window, this will open up the Employee Information screen.
2. Next to Status click the drop down menu and change the user from Active to Terminated. A pop-up will then be displayed asking if you are sure you want to terminate the employee. Click OK.
3. To complete the process you must indicate a termination reason from the drop-down menu then click Update at the bottom of the screen. You can then specify a termination reason, termination date, and if the user is eligible for rehire. If no termination date is listed the system will use the day they are terminated as the date.

Rehiring Users
Users can only be rehired if the Eligible for Rehire box has been checked. Note that eligible for rehire status can be changed at any time. To rehire an employee change their status from Terminated to Active. Double-check all employee information is accurate then click Update and finally Save and Close.

Reviewing and Editing Time Punches
To review and edit time punches click Edit in the Actions column of the Labor Summary for the current week. This will bring you to the Labor Detail screen which is also the same screen used for the Labor Actuals review task.

To adjust time in/out, enter the correct time next to the shift and click Update at the bottom. Note that the time is displayed in 24 hour format.

To select a different day click the drop down menu at the top then click Retrieve.
Time and Labor Reporting
The Labor Summary gadget is used for reporting. It holds time punch data and calculates labor cost information for the selected labor period. By default, this gadget will only show pay periods that have a status of reviewed/not reviewed. To see previous posted labor periods click the filter at the top of the tile to see posted periods.

<table>
<thead>
<tr>
<th>Report</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee</td>
<td>Displays all time punches for the entire week. By default this report will summarize by employee.</td>
</tr>
<tr>
<td>Position</td>
<td>Displays total hours for the week by position (crew vs. management).</td>
</tr>
<tr>
<td>Control</td>
<td>Compares forecasted sales to actual sales. Displays variances between actual and scheduled payroll by date.</td>
</tr>
<tr>
<td>Productivity</td>
<td>Displays variances between actual and scheduled hours per employee. Useful for seeing how close employees are adhering to the schedule. Helps identify employees clocking in early or clocking out late.</td>
</tr>
<tr>
<td>Projected Overtime</td>
<td>Projects potential overtime for employees.</td>
</tr>
</tbody>
</table>

Tip: These reports be filtered and summarized using the drop down menus at the top. To apply a new filter and reload the data click Retrieve on the right.

Staffing Level Templates
Ideal Staffing Templates allow authorized users to create scheduling templates in which the number of employees or number of hours that should be scheduled for each position can be defined based on the level of sales, guests, or checks that have been forecast for the relevant parts of the labor schedule day. These templates will be utilized in the Net-Chef Labor Schedule module to calculate Ideal Hours for each day of the week.

Authorized users will be able to utilize and/or copy staffing templates created by corporate and will also be able to create new templates specifically for use at their location. Templates can include incremental sales, guest, or check value ranges based on forecasts by the 'Week', 'Day', 'Dayparts', 'Hours', '30 Minute Intervals', or '15 Minute Intervals'.

For parts of the day that have no forecasts (i.e. "Prep" and "Cleanup", when the store is not open for business), users can set up employee staffing levels based on the total forecast for the day.

"Ideal Hours" is the total number of labor hours for which employees (at all positions or a particular position) should be scheduled for each day, as determined by forecasted sales, guests, or checks. By calculating the "variances" between Ideal Hours (i.e. suggested labor hours) and Scheduled Hours, the application will give managers a general sense of whether they are potentially under-scheduling or over-scheduling employees for a particular day. The application will calculate "Ideal Hours" based on setup done in the Net-Chef Sales Forecasts screen and the Staffing Templates defined in either Enterprise Manager or Net-Chef.

Ideal Staffing Templates allow authorized users to create scheduling templates in which the number of employees or hours that should be scheduled for each position during each part of the day can be defined based on the level of forecasted sales, guests or checks. Corporate users can create Staffing Templates in Enterprise Manager for use at all locations; store-level users can create them in Net-Chef for their own location.

Templates can include incremental sales, guest, or check value ranges based on forecasts by the 'Week', 'Day', 'Dayparts', 'Hours', '30 Minute Intervals', or '15 Minute Intervals'. For parts of the day that have no
forecasts (i.e. "Prep" and "Cleanup", when the store is not open for business), users can set up employee staffing levels based on the total forecast for the day.

When setting up staffing templates, the staffing levels for the PRE SHIFT – PREP/SETUP' and 'POST SHIFT – CLEANUP' schedule drivers are defined according to various levels of daily forecasted "Total Sales", since these times don't have actual product sales. Staffing levels for the 'NET SALES' driver will be defined according to various levels of forecasted sales for the time frame designated by the locations "Scheduling based on" setting.

- For the 'NET SALES' driver, sales/staffing ranges can be defined as follows:
  - If "Scheduling Based On" is set to 'Dayparts', 'Hours', '30 Minute Intervals', '15 Minute Intervals', enter the appropriate number of employees that should be scheduled in each position during this time frame.
  - If "Scheduling Based On" is set to 'Day' or 'Week', enter the total number of hours needed for each position during this time frame.

- For the 'PRE SHIFT – PREP/SETUP' and 'POST SHIFT – CLEANUP' schedule drivers, sales/guests/checks value ranges are defined according to the "Week" forecasts (if "Scheduling Based on" = 'Week') or "Day" forecasts (for any other "Scheduling Based on" setting).

In order to fully configure a Staffing Template, staffing levels must be defined for ALL applicable Schedule Drivers.

Note: Each location can have one or more staffing templates and can link them to labor schedules for use in the Ideal Hours calculation.

**Demand Based Template**

The **Staffing Level Templates** setup screen will allow authorized users to create and maintain a list of labor scheduling templates that will be used to calculate and display "Ideal Hours" in the Net-Chef 'Labor Schedule' module.

Users can create Demand-based templates and define Position/Demand ranges to get the desired "Ideal Hours" for each Position on the Labor Schedule. Demands can be based on the level of forecasted sales, guests, or checks.

1. Click **Staffing Level Templates** under the Labor menu. The **Staffing Level Templates summary** screen will open.
2. To create a new demand-based template, click the **New Staffing Level Template (Demand)** button. To edit an existing template, click the **Edit** link or double-click a template row of the appropriate template.

**Note:** This screen will display Positions that are either not associated with any Concept, or are associated with at least one of the same Concepts as the current Application User.

3. On the **Template Details** tab, enter the **Template** name.
4. The **Active** box is checked by default; clear this check box if the template should not be active.
5. The **Labor Schedule Driven By** setting defaults to 'Sales' to indicate that labor staffing should be based on sales demands. If necessary, select 'Guests' or 'Checks' from the drop-down to indicate
that labor staffing should be based on forecasted guest or check counts. *Once the template has been saved, this setting cannot be changed.*

6. The **Schedule Driver** defaults to 'PRE SHIFT – PREP/SETUP'. If necessary, select 'NET SALES' or 'POST SHIFT – CLEANUP' from the drop-down to define staffing levels for those drivers.

   **Note:** In order to fully configure a Staffing Level Template, staffing levels must be defined for **All Schedule Drivers** (i.e. the Pre Shift, Net Sales, and Post Shift drivers). A Schedule Driver is listed as "Not Reviewed" in this drop-down until it has been selected by a user.

7. If the Schedule Driver is set to 'NET SALES', the **Revenue Center** can be edited and will default to 'All'. If not, this field cannot be edited. If necessary, select a revenue center from the drop-down to define staffing levels specifically for it.

8. The selection ( 'Week', 'Days', 'Dayparts', 'Hours', '30 Minute Intervals', '15 Minute Intervals') in the **Scheduling Based on** drop-down determines the time frame for which staffing levels are defined. This will default to the "Scheduling Based on" setting selected on the Labor tab of the **Preferences** setup screen. If necessary, select another option from the drop-down.

9. If "Labor Schedule Driven By" is set to 'Sales', the **Base Currency** can be changed to another currency used by any active location. If not, this field cannot be edited. *(This drop-down will not appear if the Company and all Locations are configured to use the same currency.)*

10. The **Sales/Guests/Checks >=** field will default to '0' for the first range; this cannot be edited. For subsequent ranges, enter a beginning range in this field.

   - For the 'NET SALES' driver, sales, guest, or check value ranges can be defined according to forecasted sales/guests/checks for the "Scheduling Based on" time frame selected in step 8.
   - For the 'PRE SHIFT – PREP/SETUP' and 'POST SHIFT – CLEANUP' schedule drivers, sales/guests/checks value ranges are defined according to the "Week" forecasts (if "Scheduling Based on" = 'Week') or "Day" forecasts (for any other "Scheduling Based on" setting).

11. For each position, enter the appropriate number of employees or hours required to meet the level of Sales/Guests/Checks defined in step 10 for the selected schedule driver, as follows:

   - If "Scheduling Based On" is set to 'Dayparts', 'Hours', '30 Minute Intervals', '15 Minute Intervals', enter the appropriate number of employees that should be scheduled in each position during this time frame.
   - If "Scheduling Based On" is set to 'Day' or 'Week', enter the total number of hours needed for each position during this time frame.

   **Note:** If necessary, a position can be removed from the template by clicking the [*] button in the **Delete** column to the left of the Position Name. To add a Position to the template, click the **Add Position** button.

12. To define the next incremental range, click the **Add Range** button. This will add another column to the right of the first range column.

   **Note:** The user configuring the template is responsible for ensuring that there are no unintended gaps between ranges. If necessary, a range can be removed from the template by clicking the [*] **Delete** button above the range column to the left of the starting value.
13. Repeat steps 10-12 to define additional staffing levels/hours for each position & range for the current schedule driver. Repeat steps 6-12 to define staffing levels/hours for each schedule driver.

14. Click the **Update** button to temporarily save any changes without closing the screen.

15. Click the **Print** button to print a report that includes the data for all of the Positions (with at least 1 entry), Schedule Drivers, and Revenue Centers in the template.

16. When finished, click the **Save and Close** button.

**Task Based Templates**

The *Staffing Level Templates* setup screen will allow authorized users to create and maintain a list of labor scheduling templates that will be used to calculate and display "Ideal Hours" (based on forecasted sales, guests or checks) in the Net-Chef *Labor Schedule* module.

Users can create Task-based templates and define ranges for multiple Position/Task combinations to get the desired "Ideal Hours" for each Position on the Labor Schedule. Tasks defined on these templates will appear on the Net-Chef Dashboard.

1. Click **Staffing Level Templates** under the Labor menu. The **Staffing Level Templates** summary screen will open.

2. To create a new demand-based template, click the **New Staffing Level Template (Task)** button. To edit an existing template, click the **Edit** link or double-click a template row of the appropriate template.

3. On the **Template Details** tab, enter the **Template** name.

4. The **Active** box is checked by default; clear this check box if the template should not be active.

5. In the first row, enter a **Task** description (up to 40 characters).

6. Select a **Position** from the drop-down.

7. Enter the **# of Employees** that will be needed to complete this task in the specified time frame.

8. Check the box for each **Day** of the week that this task should be performed by employees in the selected position. Note: The order in which the days of the week will appear is based on the Company "Week Ending Day" setting.

9. Enter the **Start Time** and **End Time** to indicate the time of day (in 24-hour time format) during which the task should be performed.

11. Check the **Sched. Task** box to make this task available in the Labor Schedule screen in Net-Chef. *If checked, the # of Employees and Start/End Times will be factored into the Ideal Hours calculation on the Labor Schedule for the selected days.*

12. Check the **Dash. Task** box to make this task available in the Daily Tasks section of the Net-Chef Dashboard. *If checked and this template is selected as a location’s "Default" template, this task will appear on the Dashboard for the selected day(s) of the week, with the End Time as part of its due date/time.*
13. The **Active** box is checked by default; clear this check box if the task should not be active. *If a task is "Inactive", it will not be factored into the Ideal Hour calculation nor displayed on the Dashboard, regardless of the settings in steps 11 & 12.*

14. To define additional tasks, click the **Add** button and repeat steps 5-13 for each new row.

15. Click the **Update** button to temporarily save any changes without closing the screen.

16. To print a report of all tasks currently displayed on the screen, grouped by Position, click the **Print By Position** button.

17. To print a report of all tasks currently displayed on the screen, grouped by Day of the week, click the **Print By Week Day** button.

18. When finished, click the **Save and Close** button.

**Creating Schedules**

Schedules can be created and printed from the Labor Schedules area or in Teamworx. The best place for schedule management is in Teamworx. The database is shared, so you can view and edit the schedule in both Teamworx and Net Chef.

**Scheduling in Net Chef**

Note that it is highly recommended that you manage your schedule in Teamworx.

1. To create a new schedule in Net Chef, click the plus sign in the top right from the Labor Schedule area.

2. This will bring you to the Labor Schedule screen. Choose the ending week and if desired the staffing level template. These templates tells the system how many employees you will need on the schedule for your sales volume.
Once you have made your selections click **Save and Continue**.

![Save and Continue button](image)

This will take you to the master labor scheduling tool which shows all employees and their schedule for the week. The recommended way to get comfortable with this editor is to take your current hand-written schedule and enter it into this tool. Note that in order to see forecasted sales numbers you must have already reviewed your labor forecast for that week.

![Create New Labor Schedule](image)

Once you have written out your schedule click **Update** to save your progress. To write schedules for individual days, click on the individual date at the top.

![Labor Schedule for Week Ending 08/30/2015](image)

This will bring you to the daily editor which allows a visual representation of each shift. To add a shift click the time then drag the blue highlighter to the time the shift ends.

![Scheduled Labor and Station Assignment](image)
Employees can also be assigned to specific stations from the station assignment tab. This will allow the station to appear under the person’s name on printed schedules.

Once the schedule for the week has been completed you can print a full labor schedule from the bottom of the editor or an employee schedule which shows separate schedules for each employee.
Teamworx Scheduling

Overview
TeamworX is a scheduling and shift maintenance tool that works alongside CrunchTime. This separate tool allows managers to manage shifts and communicate with employees. It also gives employees access to see their shifts and make requests to alter their schedule. This site is also optimized for mobile, so navigate to the same URL for a mobile experience.

Logging in
To log in to TeamworX go to teamworx.fiveguys.com then click Create Account. You will need to know your CrunchTime employee number and date of birth. If you are set up as a manager in CrunchTime you will have the option to log in to the Manager Console which is used to make changes to shifts and handle employee requests. Download employee instructions here.
Essential Teamworx Functions

Daily Roster
Upon logging in you will be taken to the Daily Roster which shows the current day’s schedule. If you’ve created a schedule for that week already in Net-Chef this will be imported into the system. This view is helpful in planning your day. Tip: click the report icon for more detailed metrics on the day.

Managing Schedules
To manage schedule click on Manage Schedules on the left. This will take you to a list of weeks organized by ending date. From here you can view previous schedules, edit the current schedule, or create a new schedule. If you have a staffing level template set up for your location, you can select it to be given ideal hours based on your forecast.
Weekly View

Employee Tasks
Lists all current tasks in progress in Net-Chef.

Employee Tasks

<table>
<thead>
<tr>
<th>Task</th>
<th>Description</th>
<th>Position</th>
<th>Employee</th>
<th>Time</th>
<th>Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Wednesday 08/31</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Thursday 09/01</td>
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</tr>
<tr>
<td>Friday 09/02</td>
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</tr>
<tr>
<td>Vendor Order Reconcile</td>
<td>BOSS - Masada Bakery</td>
<td>Managerial Task</td>
<td>Once: 09/02/2016</td>
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<tr>
<td>Vendor Order Reconcile</td>
<td>CDI</td>
<td>Managerial Task</td>
<td>Once: 09/02/2016</td>
<td></td>
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</tr>
<tr>
<td>Vendor Order Create</td>
<td>BOSS - Masada Bakery</td>
<td>Managerial Task</td>
<td>Once: 09/02/2016</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
**Staff Requests**
Staff requests for changes to their schedules will appear in this section. Staff can request to swap shifts with other employees, pick up available shifts, request time off, change availability, and update their employee record. Any changes must be approved by a manager in this section. If the changes affect labor cost you will see the difference listed as well.

**Message Center**
Message Center allows you to send messages out to all employees using the email address they have on file in their CrunchTime profile. You can message all employees or choose specific recipients.

**Employee List**
Employee list shows all current employees and their contact information.

**Open Shifts**
Open Shifts allows you to post open shifts when you have open availability in your schedule. To post an open shift, click the Post an Open Shift then select your day, position, station, and the scheduled hours. You can also add a message at the bottom of necessary. Once complete click Post. After an employee responds you can approve it in the Staff Requests section.
Manage Blackout Dates

Allows you to set blackout dates where employees cannot request time off in the system.
Production – Prep Worksheet

Prep Worksheets
Generating a prep worksheet uses your store’s sales mix and forecasted sales to estimate prep quantities for a specified date. Note that your sales forecasts need to be reviewed first for these numbers to generate.

To generate a prep worksheet hover your mouse over Production, then in the reports section select 7-Day Pre-Production Summary. This will bring up a list of all prep items for the next seven days organized by day part (lunch and dinner).

To see results for one specific day, filter by entering the current date under Action Date on the left then press enter. Then click the box next to Summarize by Action Date and press retrieve. This will give you the total amount for each item for that specific day.