



Inventory Management & Stock Rotation Checklist

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Receiving & Initial Stocktake

Procedures for receiving deliveries and conducting initial stock counts.

Delivery Date

Enter date...

Purchase Order Number

Enter a number...



Supplier Name & Contact Information

Write something...

Quantity Received (per item)

Enter a number...

Condition of Delivery (e.g., Excellent, Good, Damaged)

☐ Excellent

☐ Good

☐ Damaged

Notes on Delivery or Discrepancies

Write something...

Supporting Documentation (e.g., Delivery Note)

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Quantity Discrepancy (if any)

Enter a number...

Explanation of Discrepancy (if applicable)

Write something...

Storage & Organization

Guidelines for proper storage, labeling, and organization of inventory.

Maximum Stacking Height (per shelf/rack)

Enter a number...

Designated Storage Area for Perishable Items?

☐ Yes

☐ No

Describe Labeling Standards (e.g., product name, receive date, expiration date)

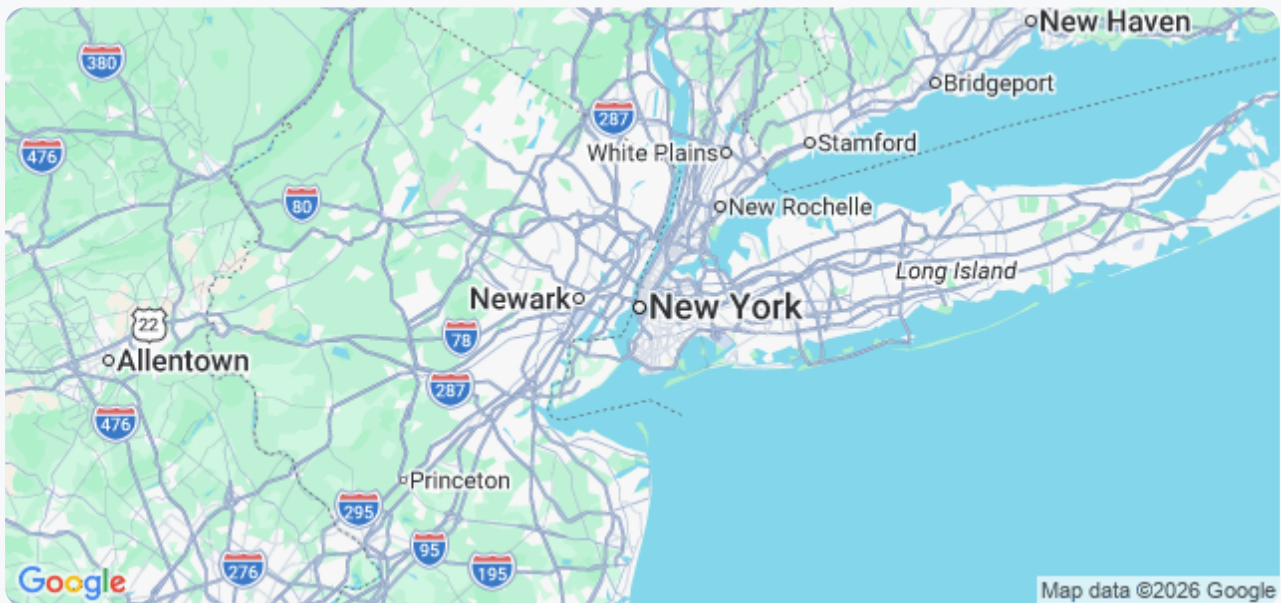
Write something...

Which storage conditions are maintained?

- ☐ Temperature Controlled
- ☐ Humidity Controlled
- ☐ Dry
- ☐ Secure (locked)

Primary Storage Location for Dry Goods

[📍 Set My Current Location](#)



Are aisles and walkways clear of obstructions?

☐ Yes

☐ No

Number of designated storage zones for allergens

Enter a number...

Describe procedures for dealing with damaged or leaking packaging

Write something...

Stock Rotation (FIFO/FEFO)

Processes to ensure oldest stock is used first (First In, First Out - FIFO and First Expired, First Out - FEFO).

Primary Stock Rotation Method

☐ FIFO (First In, First Out)

☐ FEFO (First Expired, First Out)

☐ Combination (FIFO & FEFO)

Frequency of FIFO/FEFO checks (days)

Enter a number...

Detailed Instructions for Rotating Perishable Items (e.g., produce, dairy)

Write something...

Detailed Instructions for Rotating Frozen Items

Write something...

Specific labeling requirements for indicating stock age/expiration

Write something...

Date of last FIFO/FEFO training for staff

Enter date...

Departments responsible for FIFO/FEFO compliance

- ☐ Kitchen
- ☐ Bar
- ☐ Receiving
- ☐ Storeroom

Sample Photo of Properly Rotated Stock (Example)

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Par Levels & Reordering

Setting and managing minimum and maximum stock levels and triggering reorders.

Minimum Stock Level (Safety Stock) for [Item Name]

Enter a number...

Maximum Stock Level for [Item Name]

Enter a number...

Reorder Point Trigger (Automated/Manual)

- ☐ Automated
- ☐ Manual

Lead Time (Days) for [Item Name]

Enter a number...

Last Reorder Date for [Item Name]

Enter date...

Notes on Reordering (e.g., supplier issues, seasonality)

Write something...

Reorder Quantity Method

- ☐ Fixed Quantity
- ☐ Based on Demand Forecast

Economic Order Quantity (EOQ) - (if calculated)

Enter a number...

Waste & Spoilage Management

Tracking and minimizing loss due to spoilage, damage, or theft.

Daily Spoilage Rate (%)

Enter a number...

Description of Spoilage Incident (if any)

Write something...

Primary Cause of Spoilage (Select One)

- ☐ Incorrect Storage Conditions
- ☐ Overstocking
- ☐ Poor Handling
- ☐ Expiration Date Oversight
- ☐ Theft/Damage
- ☐ Other (Specify in Long Text)

Date of Spoilage/Waste Incident

Enter date...

Estimated Value of Spoiled Goods (USD)

Enter a number...

Affected Food Categories (Select all that apply)

- ☐ Produce
- ☐ Meat/Poultry
- ☐ Dairy
- ☐ Dry Goods
- ☐ Frozen Goods
- ☐ Beverages

Corrective Actions Taken/Planned

Write something...

Attach Photo/Evidence of Spoilage (if applicable)

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Record Keeping & Documentation

Maintaining accurate records of inventory levels, transactions, and waste.

Standard Operating Procedure (SOP) for Inventory Recording

Write something...

Beginning Inventory Count (Date)

Ending Inventory Count (Date)

Notes on Discrepancies & Adjustments

Delivery Receipts (Scan/Photo)

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Date of Inventory Adjustment

Quantity Adjusted (Item Code)

Enter a number...

Reason for Adjustment

- ☐ Damage
- ☐ Theft
- ☐ Spoilage
- ☐ Counting Error
- ☐ Other

Technology & System Integration

Utilizing inventory management software and integrating with POS/ordering systems (if applicable).

Current Inventory Management System?

- ☐ None (Manual)
- ☐ Spreadsheet (Excel/Google Sheets)
- ☐ Basic POS with Inventory Tracking
- ☐ Dedicated Inventory Management Software (Specify Below)

If Dedicated Software, Specify Name & Version:

Write something...

Number of Users Accessing Inventory System:

Enter a number...

Which Systems do you need to integrate with?

- ☐ Point of Sale (POS)
- ☐ Online Ordering Platform
- ☐ Accounting Software
- ☐ Purchasing/Supplier Portal
- ☐ None

Target Date for System Implementation/Integration:

Enter date...

Describe any current integration challenges:

Write something...

Existing System Documentation (manuals, training guides, etc.):

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Training Required for Staff?

- ☐ Yes
- ☐ No

Regular Audits & Reviews

Periodic checks to verify accuracy and identify areas for improvement.

Date of Audit

Audit Type (Full/Spot)

- ☐ Full Audit
- ☐ Spot Check

Number of Items Reviewed

Number of Discrepancies Found

Description of Discrepancies (if any)

Corrective Actions Taken

Write something...

Audit Outcome (Pass/Fail/Conditional)

- ☐ Pass
- ☐ Fail
- ☐ Conditional

Recommendations for Improvement

Write something...

Auditor Signature