✅ ChecklistGuro

Inventory Management & Stock Rotation

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)

Enter a number...

Ending Inventory Count (Date)

Enter a number...

Notes on Discrepancies & Adjustments

Write something...

Delivery Receipts (Scan/Photo)

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Date of Inventory Adjustment

Enter date...

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

Enter date...

Audit Type (Full/Spot)

☐ Full Audit

☐ Spot Check

Number of Items Reviewed

Enter a number...

Number of Discrepancies Found

Enter a number...

Description of Discrepancies (if any)

Write something...

Corrective Actions Taken

Write something...

Audit Outcome (Pass/Fail/Conditional)

- ☐ Pass
- ☐ Fail
- ☐ Conditional

Recommendations for Improvement

Write something...

Auditor Signature