



# Inventory Management & Stock Rotation Checklist

## Receiving & Initial Stocktake

Procedures for receiving deliveries and conducting initial stock counts.

### Delivery Date

### Purchase Order Number

### Supplier Name & Contact Information

### Quantity Received (per item)

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

- Excellent
- Good
- Damaged

### Notes on Delivery or Discrepancies

Write something...

### Supporting Documentation (e.g., Delivery Note)

 Upload File

### 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)

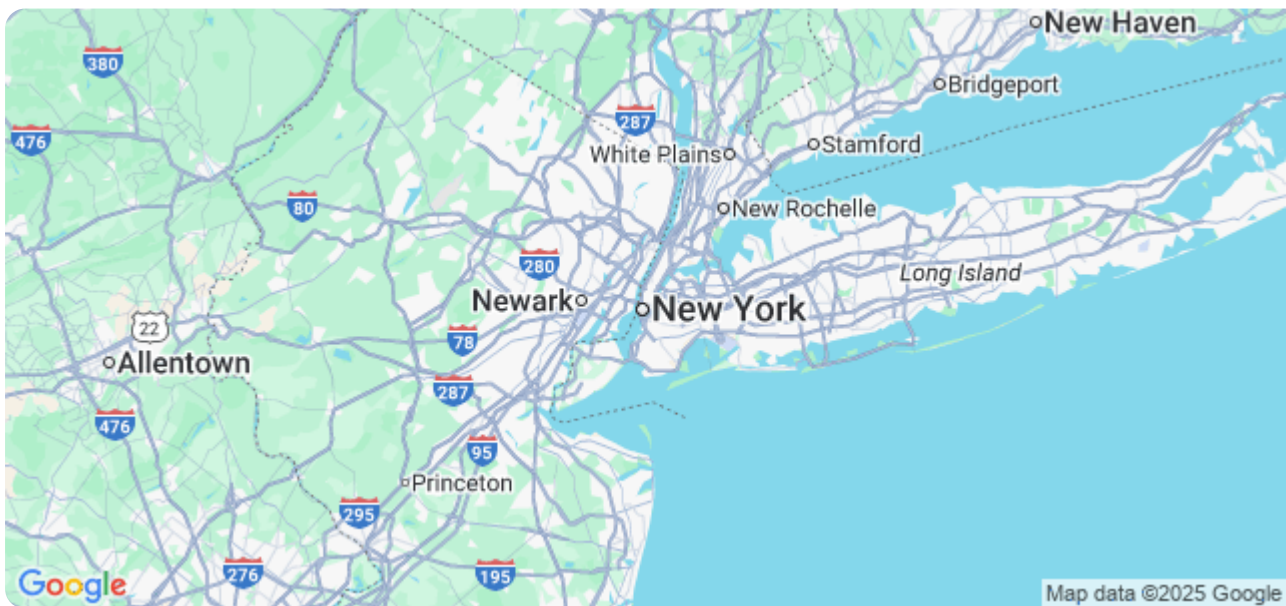
Write something...

### 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)

 Upload File

# 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)

 Upload File

## 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)

 Upload File

## 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.):

 Upload File

### 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**

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