Product Projections

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Overview

Introduction

Projections use an 8 week history to create a forecast for product use. The goal of Product Projections is to:

• Have enough fresh product on hand.
• Minimize product waste caused by cooking too much product.

MERIT helps you meet these goals by forecasting needs for up to 19 different products. Projections are based on 8 weeks of sales history. If there is a new product or promotion increase or decrease sales, MERIT’s projections can be adjusted. Use the projection system to see how much product to prepare every hour. Stores that have the Online Projections system will still need to adjust product projections but will have their cook calls calculated and displayed for them. See the Online Projections section for more details. Review projections during SOD and make any adjustments needed. A daily history graph will appear for up to 8 core products during SOD. These will be the items from the Auto Projections report. When all of these graphs have been reviewed, updated, and closed you will be able to adjust projections for your other products.

• If there is a promotion or new product, adjust projections.
• When SOD is complete the projections worksheets will print. Post them so you and your team will know how much to prepare.
• Adjustments can be made throughout the day by going into the Product Forecast and making any necessary changes. When you are finished, print a new copy of the projections worksheets.

• The weather could have changed or you could have had a better or worse response to a promotion than expected. During the day, prepare product according to the Should Have quantities on the projection worksheet.

• Create and modify projections reports using Projections Report Builder.
• Rotate product systematically using FIFO. This will help you serve hot and fresh product and find product which has expired and should be thrown away or restaged.
• Enter catering orders on MERIT. Catering orders are a special type of projection. You know exactly how much product you will need and when. After you enter a catering order on the projection system, the order is added to the base projection. The system projects when to begin cooking so your catering order will be ready on time.
## Definitions

<table>
<thead>
<tr>
<th>Term</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Adj % Sold</td>
<td>Percent difference between actual sales and your adjusted forecast.</td>
</tr>
<tr>
<td>Build-to</td>
<td>Quantity of product projected to be sold in the Look-ahead time.</td>
</tr>
<tr>
<td>Expect to Sell</td>
<td>Quantity of product projected to be sold in an hour. Projected amount is weighted average over last 8 weeks.</td>
</tr>
<tr>
<td>Expired Product</td>
<td>Product not sold within its hold time.</td>
</tr>
<tr>
<td>Fresh Product</td>
<td>Product within hold time.</td>
</tr>
<tr>
<td>Increment</td>
<td>15-minute period of time. MERIT projects sales in 15-minute increments.</td>
</tr>
<tr>
<td>Look-ahead</td>
<td>Total of Prep Time + Cook Time + Hold Time.</td>
</tr>
<tr>
<td>Prep Time</td>
<td>Estimated time needed to prepare product immediately before it is placed in a fryer or oven. Example: breading chicken, placing freezer to fryer items in baskets.</td>
</tr>
<tr>
<td>Product Comparison Reports</td>
<td>Show actual and projected sold quantities by product and time. Use these reports to help you determine needs and adjust projections for new and promoted products.</td>
</tr>
<tr>
<td>Projection Worksheet</td>
<td>Worksheets you print and use to make cook decisions.</td>
</tr>
<tr>
<td>On Hand</td>
<td>Quantity of fresh product you have available for sale. Do not include expired, trashed, or restaged product.</td>
</tr>
<tr>
<td>Fcst % Sold</td>
<td>Percent difference between actual sales and MERIT’s forecast.</td>
</tr>
</tbody>
</table>
Introduction

Overview

The menu mix and menu items can differ between restaurants, MERIT allows us to change or create projections reports customized for each store. Reports that have an owner of "Corporate" cannot be deleted or modified.

Standards

- Click on Customize, then Projections Report Builder. The Projections Report screen will appear.
- Delete any unwanted user report by selecting it then clicking on the delete button.
- Create a new report by clicking on the Create New button or select an existing user report to modify it.
- Enter or modify the name of the report at the top under "report info".
- Select the time period for the report from the dropdown list. Options are daypart, 15 minutes, 30 minutes or hourly.
- Select the items you would like to appear on the report by selecting the type of projection item shown on the tabs. Options are Thaw, Prebread, and Cook. You can select items from multiple tabs on the same report.
- Items shown in the left pane are unselected, while items in the right pane will show on the report.
- Click the Select All button to move all items in the left pane to the right pane.
- Click the Remove All button to move all items in the right pane to the left pane.
- Select individual projection items by clicking on the check box next to it in the right pane.
- Deselect item by clicking on the checkmark next to the item in either the left or right pane.
- To sequence items up and down the selected list in the right pane using the arrows to the far right. The order of the items in the list determines their order on the report. The up arrow with the line above it moves an item to the top of the list. The up arrow (with no line) moves an item up one spot on the list and the down arrow moves an item down one spot. The down arrow with the line under it moves an item to the bottom of the list.
- Click on the Apply button to save your changes and leave the application open to make additional changes.
- Click on the OK button to save your changes and exit the application.
- Click on the Cancel button to exit the application without saving your changes.
- The New or Modified report will be available to be viewed or printed as a Projection Worksheet or Projections Comparison.
Adjusting Projections

Introduction

Overview

MERIT projects product needs using the last 8 weeks’ product sales history. These projections do not account for holidays, first of the month, new products, or promotions. Check adjustments at the beginning of each day, before your team begins cooking. If you think the system projection is a good estimate of how much product you will sell, you don’t need to adjust projections.

If you want to adjust for a promotion or new product, manually adjust projections. When you are finished adjusting, print and post the new projections worksheets. Your team will use these to know how much product to prepare.

Standards

Select Product Forecast

- Click on Forecasting, then Product Forecast. The Forecast Adjustment screen appears.

Adjust Forecast

- Enter forecast adjustments. Adjustments can be entered by daypart for all products, by daypart for individual products, by total for all products, by total for individual products, or by any combination of these. Adjustments can be entered by percentage or quantity. To adjust a product by a percentage within a daypart, press F7 on your keyboard. Enter the adjustment then click on OK.
- Click the Reset Day button to reset adjustments back to the original system forecast if needed.
- Click the Reset Object button to reset adjustments for an individual item back to the original system forecast if needed.
- To view the forecast history for an item, select the product and time frame then click the View History button. After the confirmation box appears, click Yes to confirm or No to return to the Forecast Adjustment screen. Review the sales and forecast history for the product selected. Use the slider on the right-hand side of the window to make adjustments if needed, then click OK.
- Click OK after all adjustments are made. The system saves the new product forecast amounts.
Introduction

Overview

Follow these steps to print Projection Reports.

Standards

Select Reports

- Click on Reporting, then Reports. The Manual Reports Processing screen will appear.
- Use the scroll bar to scroll down to Projections, or type 'projections' in the Find box and click the Find button.
- Click on Projection Worksheets to expand the window.
- Click the Show button. The Report Composer window will open.
- Select the worksheet you want to print from the drop-down box then click on OK. Projection worksheet(s) will compile and open when ready.
- Click Print to print the worksheet(s).
- Click Exit to exit the Report Composer window.
- Repeat steps to print additional worksheets, or click OK on the Manual Reports Processing screen. The window will close.
Introduction

Overview

Use the product projection worksheets to help you make cook decisions. There are 3 steps:

2. Check for expired product. If any On Hand product has expired, restage chicken on-the-bone, strips and filets and trash all other products. Then write down actual amount On Hand.
3. Figure amount to cook. Build To amount - On Hand amount = Suggested amount to cook.

Standards

Count Products On Hand

- Count products on hand before making cook decisions and write on the Projection Worksheet. It is not recommended to count each piece of chicken or individual side item.
- Reduce the amount of time it takes to count On Hand product by labeling holding units, rotating product consistently. Also by assigning Team Members to count products. For example, you can assign counting side items to a Team Member.
- Include product currently being prepared in your on hand amounts.

Check for Expired Products

- Check hold times. Use the color time tag system to determine which products have expired or are about to expire. Do not include these products in your on-hand count.

Make Cook Decisions

Use this formula to help you decide how much to cook:

Build To – On Hand = Suggested Amount to Cook

- Is On Hand more than Build To? Do not cook unless some of the On Hand amount is about to expire. If so, do not include the product about to expire in the On Hand quantity.

- Is On Hand less than Build To? Prepare more.

- Compare On Hand amount to Build To amount. For example, you have 8 heads On Hand and the Build To is 13 heads at 12:00 p.m. Example: 13 heads (Build To) – 8 heads (On Hand) = 5 heads (Suggested amount to cook)

- Round off cook quantities to make efficient use of cookers and labor (4 heads, 8 heads, etc.). Example: If you need 5 heads for lunch rush, you could round up and cook 6 heads.
Introduction

Overview

Use a consistent system to rotate product. This helps you:

- Avoid serving product that has expired.
- Track product holding times and find which product has expired.

Use FIFO (First In First Out) to rotate product effectively.

Standards

Standards for Rotating Chicken and Side Items

- Use FIFO to manage all product rotation.
Introduction

Overview

This function updates the bin chart display on the monitor.

Standards

Select Projections Monitor Update

- Click on Forecasting, then Projections Monitor Update. The Update Projections Display screen will appear.
- The screen will close automatically and return to the main menu when the display is updated.
Introduction

Overview

You can enter catering orders in advance. The system will include the quantity of each product in the product projections for that day.

MERIT can help in deciding when and how much product to prepare for normal sales plus catering orders.

This section explains how to:

- Enter a catering order.
- Change or delete a catering order.
- Copy an existing catering order.
- Print a catering order.
- Add new catering customers.
- Delete existing catering customers.

Remember, when you ring up a catering order on a POS register, be sure to ring it on the catering key. Orders rung up on the catering key are not included when MERIT projects product needs.

Standards

Select Catering

- Click on Forecasting, then Catering. The Catering screen appears.

Entering a New Catering Order

- Click the New Order button. The Order Details - New screen appears.
- Use the drop-down arrow to select the date of the catering.
- Use the up and down arrows or keyboard to enter the time for catering.
- Use the drop-down arrow to select the customer from the list. If this is a new customer, click the Customer Maintenance button and follow the steps for entering a new customer. Refer to the Adding or Editing a Catering Customer section.
- Click the order items from the Available Items list. Click the Add Item button to add them to the Selected Items list.
- Enter the quantity for the item.
- Click OK after all order items are added. The order is saved.

Editing an Existing Catering Order

- From the catering screen, select the order you want to edit.
- Click the Edit Order button. The Order Details - Edit screen appears.
- Make changes to items or quantities as needed.
- Click OK. Changes to the order are saved.
Entering Catering Orders

Copying an Existing Catering Order

- From the Catering screen, select the order you want to copy. If the order occurred in the past, make sure the Past checkbox is selected.
- Click the Copy Order button.
- Make any changes needed.
- Click OK. The copied order is saved.

Deleting a Catering Order

- From the Catering screen, select the order you want to delete.
- Click the Delete Order button.
- Click Yes to confirm you want to delete the order. Click No if you don't want to delete the order.

Printing a Catering Order

- From the Catering screen, select the order you want to print.
- Click the Print Order button. The Report Viewer screen appears.
- Click Print to print the order.
- Click Exit to return to the Catering screen.

Adding or Editing a Catering Customer

- From the Catering screen, click the Customer Maintenance button. The Customer Maintenance screen appears.
- To add a new customer, click the New Customer button. Enter the customer's name, contact, phone number and any special instructions. Click OK. The Catering screen appears.
- To edit an existing customer's information, select the customer's name from the list. Make any changes needed. Click OK. The Catering screen appears.
Troubleshooting Projections

Introduction

Overview

Two possible problems are:

- Running out of product.
- Having too much leftover, expired, or trashed product.

If customers have to wait for product and your product efficiencies are close to 100%, you are not keeping enough product on hand.

Projections not Accurate

<table>
<thead>
<tr>
<th>Possible Cause</th>
<th>Could be caused by</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee meals not rung up when eaten.</td>
<td>• Ring up meals as eaten.</td>
</tr>
<tr>
<td>Orders packed differently from what was rung up.</td>
<td>• Use cut/add.</td>
</tr>
<tr>
<td></td>
<td>• Retrain packer.</td>
</tr>
<tr>
<td>Product sold but not rung up.</td>
<td>• Monitor team and take appropriate action.</td>
</tr>
<tr>
<td>Cashiers rang up orders incorrectly.</td>
<td>• Coach team to ring orders correctly.</td>
</tr>
<tr>
<td>Deletes and Customer Giveaways not rung up.</td>
<td>• Train management team on procedures.</td>
</tr>
<tr>
<td>Catering orders not entered.</td>
<td>• Coach management team on procedures.</td>
</tr>
<tr>
<td>Product not counted and cook decisions not made.</td>
<td>• Manager must make cook decisions.</td>
</tr>
<tr>
<td></td>
<td>• Assign 2 or 3 Team Members to count products and record counts on worksheets.</td>
</tr>
<tr>
<td></td>
<td>• See procedure for counting On Hand.</td>
</tr>
<tr>
<td>Products are new (no sales history in MERIT).</td>
<td>• Refer to minimum Build To downloaded to your system.</td>
</tr>
<tr>
<td></td>
<td>• Make adjustments to the product forecast for this item and print out the New Projections worksheet.</td>
</tr>
</tbody>
</table>

Too Much Expired Product

<table>
<thead>
<tr>
<th>Possible Cause</th>
<th>Could be caused by</th>
</tr>
</thead>
<tbody>
<tr>
<td>Manager made inaccurate adjustments on Manager's Workstation.</td>
<td>• Adjust only products impacted by the promotion.</td>
</tr>
<tr>
<td></td>
<td>• Use Product Comparison reports to help you decide how much to adjust.</td>
</tr>
<tr>
<td>Manager made adjustment based on a small number of items sold yesterday (20 or less).</td>
<td>• Be cautious about making a large adjustment if it is unlikely the same thing will happen again today.</td>
</tr>
<tr>
<td>Customers are ordering lots of white meat. Dark meat pieces are left over.</td>
<td>• Run a Menu Mix report to find your ratio of white meat to dark meat orders and cook accordingly.</td>
</tr>
</tbody>
</table>
**Too Much Product Leftover at End of Day**

<table>
<thead>
<tr>
<th>Possible Cause</th>
<th>Could be caused by</th>
</tr>
</thead>
</table>
| More product cooked/prepared than projected. | • Follow projection guidance and possibly cook smaller quantities more often near end of day business.  
  • Keep side items in bulk and fill small quantities of large and small containers as you need them. |
| Incorrect or no adjustments made to 8:00 p.m. – Close daypart. | • Base adjustments on:  
  • Prior day's results  
  • Current day's trend  
  • Communications in Management Planner  
  • Leave communications in Management Planner concerning what happened for next day's MOD. Example: Day was trending 35% ahead of projections so I adjusted 5-8 p.m. and 8 p.m.-Close up 35%. Adjustment was correct for 5-8 p.m., but 8 p.m.-Close would have been better left unadjusted (not busier). |

**Running Out of Product**

<table>
<thead>
<tr>
<th>Possible Cause</th>
<th>Could be caused by</th>
</tr>
</thead>
</table>
| Incorrect On Hand counts. | • Hold prepared product in same place all the time.  
  • Put labels on drawers/cabinets so everyone can find cooked product when doing On Hand counts. |
| Incorrect or no adjustments made to 8:00 p.m. – Close daypart. | • Base adjustments on:  
  • Prior day's results  
  • Current day's trend  
  • Communications in Management Planner  
  • Leave communications in Management Planner concerning what happened for next day's MOD. Example: Day was trending 35% behind projections so I adjusted 5-8 p.m. and 8 p.m.-Close down 35%. Adjustment was correct for 5-8 p.m., but 8 p.m.-Close would have been better left unadjusted % (not slower). |
| Less product cooked/prepared than projected. | • Follow projection guidance and adjust projection forecast in MERIT if needed. |