SOP: Inventory Count and Documentation

This SOP details the **inventory count and documentation** process for food, beverages, and supplies, covering systematic procedures for accurate stocktaking, recording inventory levels, verifying stock counts against records, updating inventory databases, handling discrepancies, and ensuring proper storage and rotation. The goal is to maintain accurate, real-time inventory data to support efficient supply chain management, reduce waste, prevent stockouts, and optimize purchasing decisions.

1. Scope

Applies to all food, beverage, and supply stock stored on premises, including dry goods, refrigerated/frozen items, and disposables.

2. Responsibilities

- **Inventory Staff:** Conduct counts and record findings.
- **Supervisors:** Verify inventories and approve adjustments.
- **Managers:** Oversee the inventory process, address discrepancies, and make purchasing decisions.

3. Frequency

- Food & Beverage: Daily, weekly, or as specified.
- Supplies: Weekly or as needed.
- Full Inventory Audit: Monthly or quarterly.

4. Procedure

1. **Preparation**
   a. Print/update inventory sheets with last recorded stock levels.
   b. Equip personnel with tools (pens, tablets, calculators, scales, etc.).
   c. Schedule counts during low-activity times.
2. **Stock Counting**
   a. Count items systematically by section (e.g., dry, refrigerated, frozen, bar).
   b. Record actual quantities found; note damages, expiries, or open packages.
   c. Use proper measurement units (units, weight, volume, case, etc.).
3. **Documentation**
   a. Enter counts on inventory sheets or digital forms immediately.
   b. Verify data entry for accuracy.
   c. Submit completed records to supervisors for review.
4. **Verification & Reconciliation**
   a. Compare counts with previous records and usage reports.
   b. Investigate discrepancies (missing/damaged stock).
   c. Correct errors, report significant variances to management.
5. **Database Update**
   a. Update the inventory management system or spreadsheets.
   b. Save and back up updated data.
6. **Storage & Rotation**
   a. Ensure all items are stored according to safety and FIFO (First-In, First-Out) principles.
   b. Reorganize shelves as necessary.
7. **Reporting**
   a. Generate reports summarizing current inventory, discrepancies, and recommendations for reordering.

5. Documentation Examples

Item Name	Unit	Counted	Previous Record	Variance	Notes
Chicken Breast	kg	15	20	-5	Used in specials
Red Wine	btls	30	32	-2	Broken bottles

Napkins	packs	8	10	-2	Restocking soon

6. Handling Discrepancies

- For minor discrepancies, recount and verify entries.
- For significant variances, complete an incident or variance report.
- Escalate unresolved issues to management.

7. Records Management

- Retain inventory records for a minimum of one year or as per policy.
- Ensure all digital backups are up to date and securely stored.

8. Revision History

Date	Version	Description	Author
2024-06-01	1.0	Initial SOP creation	Inventory Manager