InsightChef Pro

It answers the questions a Chef doesn't even ask.

CUSTOMER ENABLEMENT GUIDE

Receiving, First Use & Pack Intelligence

The shortest reliable path from a vendor invoice to usable inventory cost.

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WHY FIRST USE EXISTS A vendor case, bottle, bunch, bag, or variable-weight package must be translated once into the unit your kitchen counts and recipes consume. The saved profile does that work on later receipts.

Before you begin

- ☐ The vendor is Active in Settings. Add the vendor there if it does not appear in the Receive Invoice dropdown.
- ☐ You have the invoice total, invoice number, PO number if used, and all freight, fuel, tax, or other charges.
- ☐ The ingredient exists in the catalog or you are prepared to send a new item through Ingredient Review.
- ☐ The storage location exists in Settings or you will add it as a custom Place In value.

Receive an invoice

1. Open Receive Invoice. Enter the Vendor Invoice Total first.
2. Select the vendor and enter the Invoice Number and PO Number when applicable.
3. For each line, choose the ingredient, enter Ordered Qty, Received Qty, and Invoice Unit Cost.
4. If the vendor-item profile already exists, confirm the purchase unit, placement, extended cost, and status that fill automatically.
5. If it is first use, answer the guided pack questions. Use the exact label from the vendor case or invoice when possible.

6. Confirm Food Subtotal plus freight, fuel, and other/tax charges reconciles to the vendor invoice total.
7. Choose Post & Start Next Invoice. Read the confirmation, then review Receiving History if needed.

First-use decision guide

What the vendor sells	Best one-time description	Inventory/recipe result
Six #6 cans	6/#6 cans	Cost can be understood per can and converted into the base volume/weight used by recipes when that measurement is supplied.
Four 10-lb logs	4/10 lb logs	The profile records 40 total lb while preserving the vendor pack description.
A 60-lb case	60 total lb	The receipt uses the actual invoice cost and a weight basis.
Six heads of romaine	6 heads	Use when heads are the practical inventory unit; add average measured weight only if recipes consume by weight.
A parsley bunch	1 bunch or vendor case count	Use the vendor's repeatable bunch/case count; convert to recipe weight or volume only when measured.
Variable-weight beef	Actual received lb plus expected pack description	Costing uses actual receipt quantity/cost. An expected average can support planning without replacing the actual receipt.
Bottle/can/case alcohol	Pack count × container size	Beverage pack profiles convert cases, bottles, cans, and kegs into costed base units.

How cost behaves

- Extended Cost equals received quantity multiplied by invoice unit cost on the invoice line.
- Benchmark ingredient costs support planning before the first real receipt. They are not a substitute for the vendor invoice.
- Actual receipts update the ingredient/vendor cost basis used by inventory and recipe costing.
- Expected pack quantities and average weights help planning; actual receipt quantity, actual invoice cost, price basis, and yield remain separate facts.
- A new ingredient must complete Ingredient Review before it can behave like a fully governed item.

Saved profile vs. new item

Status	What it means	Operator action
Accepted	The line is ready for posting.	Confirm quantity, cost, storage, and reconciliation.
First Use	The vendor-item pack profile is not yet saved.	Complete the guided questions once; review the saved result.
New Item - Review	The ingredient or vendor-item identity needs approval.	Complete the yellow review fields, choose APPROVE or HOLD, and return to Receive Invoice.

Status	What it means	Operator action
Difference	Invoice components do not equal the vendor invoice total.	Correct invoice lines or enter freight/fuel/other charges. Do not force-post an unreconciled invoice.

CLEAR INVOICE Use Clear Invoice only to abandon the current unposted form. It is not a way to remove a posted receipt from history.

After posting

- Receiving History provides a searchable view of posted receipts by vendor, ingredient, receipt ID, PO, invoice, location, or status.
- Purchased items appear in Physical Counts and inventory workflows according to the governed activation rules.
- Saved pack profiles reduce future questions for the same vendor item.
- If a receipt or PO link appears wrong, preserve the evidence and use support guidance rather than editing a ledger.