



InsightChef Pro

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

CUSTOMER ENABLEMENT GUIDE

Reports, Backup & Administration

Review results only after the source facts are current.

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Management views

View	Best use
Dashboard	Executive snapshot of inventory value, food cost, inventory health, revenue, gross margin, waste, open PO value, low stock, and pricing alerts.
Analytics Dashboard	Trend-oriented revenue, contribution, waste, open PO, and recipe performance review.
Menu Engineering	Popularity, sales mix, contribution margin, InsightChef Menu Status, and recommended action by recipe/menu item.
Inventory Usage	90-day usage, usage cost, average daily usage, menu items driving usage, and last sales date.
Purchasing	Counts, effective on hand, forecast/routine/incremental demand, ending par, vendor readiness, and order recommendation review.
Report Center	Choose the report and business date; review the live report table and print the active sheet.
Notification Center	Prioritized exceptions, including new ingredient reviews and other recommended actions.
Global Search	Find records across recipes, ingredients, vendors, inventory, and purchasing.

Before trusting a report

- ☐ The business date, date range, channel, location, and vendor filters are correct.
- ☐ Invoices, physical counts, actual production, waste, sales, and labor are posted through the intended workflow.
- ☐ Recipe and plate costs show Ready rather than Cost Required or Incomplete.
- ☐ Pack conversions and inventory units reflect how the kitchen actually buys, counts, and uses the item.
- ☐ Purchasing review includes open commitments and the current Ending Par decision.

Settings administration

- Maintain company name, currency, target food cost, warning variance, labor burden, and wage assumptions in Settings.
- Enter local tax rates by category. Zero is a valid rate for Non-Taxable and any category your business does not tax.
- Maintain active vendors in the Settings vendor master. Receive Invoice uses that active vendor list.
- Maintain Place In locations in Settings. Choose an existing location or add a chef-entered location for future use.
- Do not administer hidden sheets, formulas, code, or ledgers directly.

Backup standard

KEEP IT SIMPLE Maintain one active working workbook and one current verified backup. Close the working file before replacing the backup, and do not keep multiple workbook copies open.

When	Action
After initial setup	Create the first verified backup after settings save and reopen successfully.
After material posting	Refresh the single backup after important receiving, recipe, menu, purchasing, or month-end work.
Before a risky change	Close Excel and refresh the backup before importing or making a material governed change.
Monthly	Confirm the backup opens, macros load, and Command Center works. Retain an off-device copy if your business continuity plan requires it.

Print and export

- In Report Center, choose the report and business date before printing.
- Use File > Print > Active Sheet. Review print preview, scaling, orientation, and page count before producing a PDF or paper copy.
- Exported reports are snapshots. Return to the workbook for the governed live record.
- Do not distribute the macro-enabled workbook as a report attachment when a PDF is sufficient.