Sysco Counts

user guide

phone

welcome to sysco counts

Time is money in the foodservice business and every second counts–literally!

Sysco Counts simplifies taking inventory and ordering products by combining two powerful tools in one convenient app – saving you time and money while making your life easier!

This User Guide provides you with information on the following topics:

- New Features
- Sysco Counts at a Glance
- Getting Started
- Features at a Glance
- Managing Everything
- Frequently Asked Questions

# new features at a glance

In Sysco Counts 1.6, you can now:

- Enter your email address to receive order confirmations
- Set default options for Inventory Unit and List Ordering using the My Profile screen
- View and manage multiple accounts
- Select the next scheduled delivery date
- Capture accurate on-hand quantities and inventory count at the half case level with the automatic placement of the decimal point
- Select either case (CS) or each unit (EA) when viewing items within a par group
- Assign or tag Sysco items to your Custom Categories
- Sort lists alphabetically
- View the stock type for items you are ordering
- Identify Sysco's suggested replacement item for an item that is being phased out

Note: This user guide includes images specific to the iPhone. Unless otherwise noted, navigation and steps for Android are the same.

sysco counts at a glance

It's easy to navigate in Sysco Counts! Features you want are only a tap away.
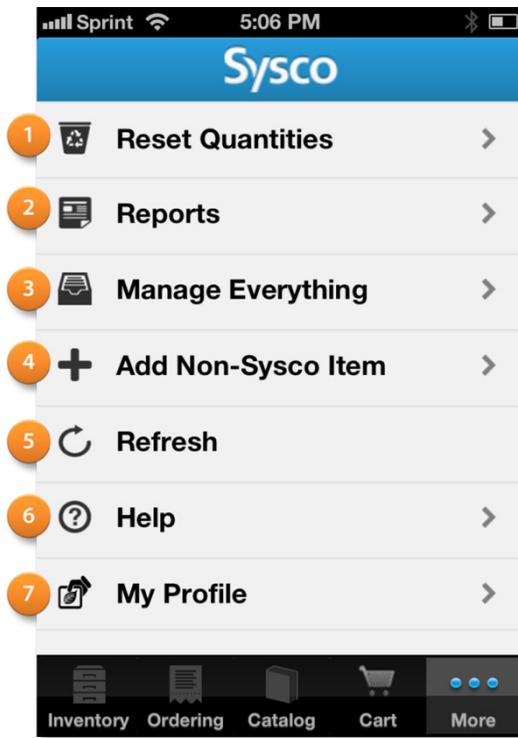
To quickly access features, tap the **More** tab to open the menu.
And tap the icon:

1	Reset Quantities	5	Refresh
2	Reports	6	Help
3	Manage Everything	7	My Profile
4	Add Non-Sysco Item		

getting started

Let's look at some basics so you can quickly get what you need and start using Sysco Counts with confidence. First, review the Help in the app.
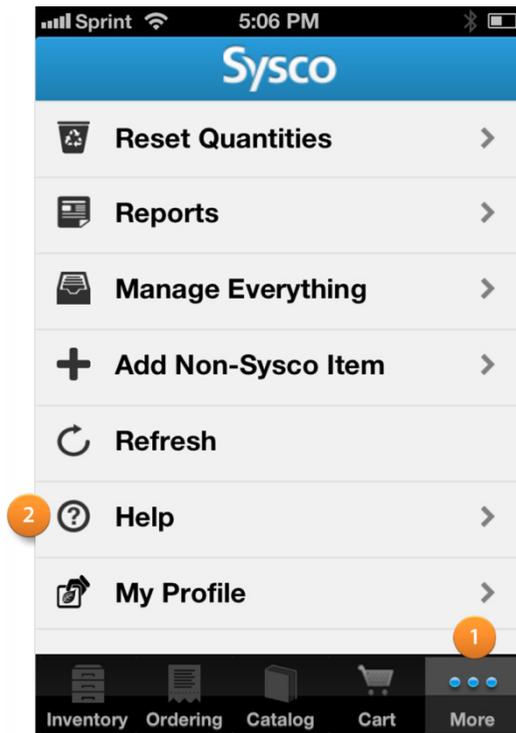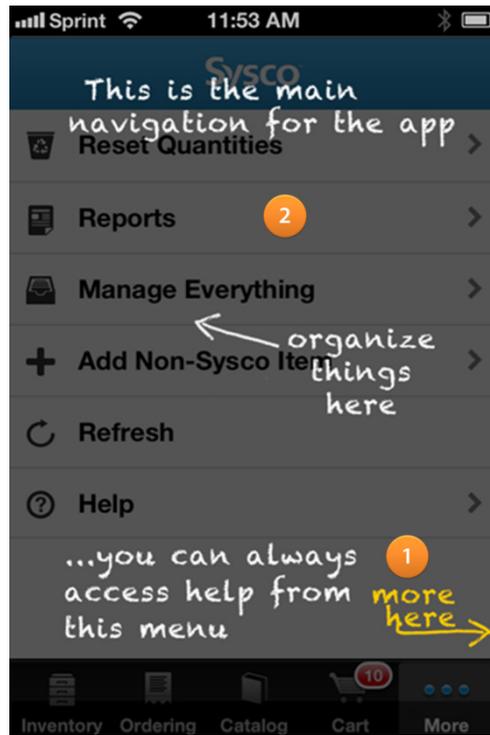

① Tap the **More** tab

② Tap **Help**

getting started

By exploring the Help, you can quickly become familiar with the Sysco Counts features.

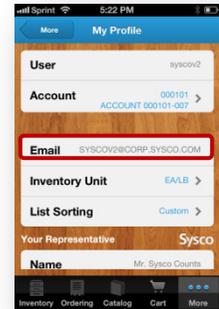1 Swipe right to view the next Help page

2 Tap anywhere to go back to the app

features at a glance

Let's look at some features that make Sysco Counts easy to use.

setting email address for confirmations

To keep informed about an order or changes to an order, enter your email address as well as your account representative's email address.

setting default options for inventory unit and list ordering

From the My Profile screen, you can indicate default settings for the Inventory Unit and List Ordering.

1. To set the Inventory Unit default, tap **CS**, **EA**, or **LB**.

    A message displays to confirm the changes for future and/or existing items.

2. To set the List Ordering default, tap either the **A-Z** or **Custom** option.

viewing and managing multiple accounts

With the multiple accounts option, you can view and manage numerous accounts without logging out. When you first log in, a screen displays listing the accounts you can access.

1. Tap the account that you want to work with.

2. Tap **Next**. A message displays informing you that information is synchronizing.

If you are already working within an account, you can easily switch between accounts.

1. Tap the **Menu** bar.

2. Tap **My Profile** ⊡. The My Profile screen displays.

3. Tap a different account to work with.

features at a glance

selecting next scheduled delivery date

When you submit an order, you can change the default scheduled delivery date to a future date on your delivery schedule.
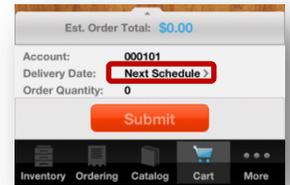
using the decimal point

You can capture accurate on-hand quantities and inventory count.

When the on-hand quantities and inventory count are set to case (**CS**), always enter the case quantity in three digits to accurately capture quantities. Once you enter the three-digit quantity, the decimal point is automatically placed to the left of the last two digits. For example, if you are taking inventory of wine, which has 12 bottles per case and have six bottles on-hand, type **050** in the **On-Hand quantity** field. The decimal point is automatically placed to the left of the last two digits.

When the on-hand quantities and inventory count are set to each (**EA**), enter the number of individual items. A decimal point is not needed. For example, if you are taking inventory of wine, which has 12 bottles per case and have six bottles on-hand, type **6** in the **On-Hand quantity** field.

defining par as case or each unit

When viewing items within a par group, select either case (**CS**) or each (**EA**) unit for each item.

tagging Sysco items to custom categories

You can assign or tag Sysco items to more specific categories that you create to make navigation easier. For example, you can create Cheese, as a Custom Category instead of assigning items to the category named Dairy.
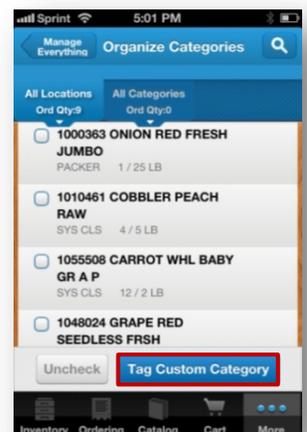
features at a glance

sorting lists in alphabetical order

Click the **A-Z View** button to sort any inventory list alphabetically.

viewing item stock type

At a glance, you can identify the stock type for items you are ordering.

viewing suggested replacement items

For your convenience, you can quickly and easily identify Sysco's suggested replacement item for an item that is being phased out.
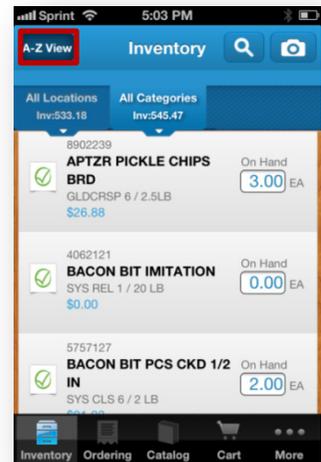
managing everything

Next, let's look at personalizing Sysco Counts with your inventory and moving items where you want to keep them.
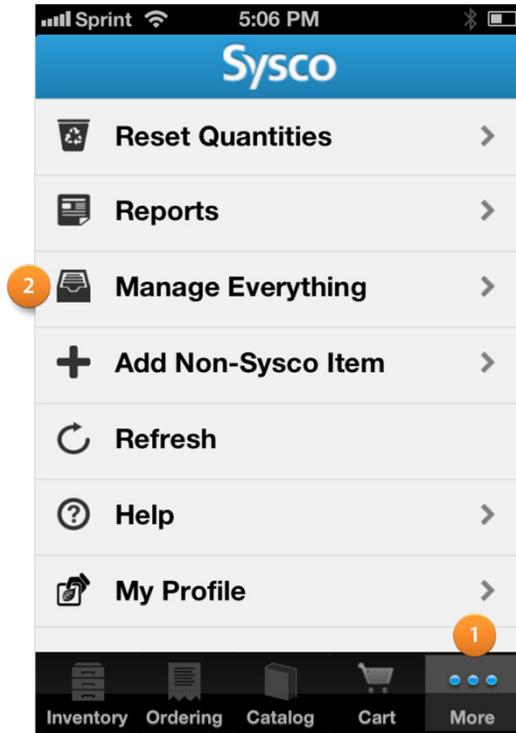
① Tap the **More** tab

② Tap **Manage Everything**

managing everything

On the Manage Everything screen, you can set up and organize locations, categories, par groups, and non-Sysco providers. Let's create a new location or category.

① Tap ➕

② Name your location or category

③ Tap **Done**

frequently asked questions

While the Sysco Counts app is user-friendly and intuitive, not everyone is a pro right away. This section provides answers to frequently asked questions about the app. Look in this section for shortcuts or answers that help you use the app more efficiently. You can also check out the Help provided in the app.

getting started

How do I download Sysco Counts?

1. Visit the Apple App store or Google Play store on your phone.
2. Type Sysco, Sysco Counts, Inventory, or Ordering in the Search bar.
3. Tap the buttons to download and install the app.
4. Contact your local Sysco representative to get started.

What are the system requirements for Sysco Counts on an Apple device?

To ensure the best performance, Sysco Counts requires iOS6 or later.

What is required to get login information for Sysco Counts?

Contact your local Sysco company so they can set you up.

How can I check out a demo of the app?

If this is your first time running the app, complete these steps:

1. Go to **Settings** and find Sysco Counts.
2. Turn on the **Demo** mode.
3. Start the app and tap to log in (no login ID or password required).

Once you have already attempted to run the app, delete the instance that is running by completing the steps below and turning on the demo mode:

1. Double-tap the **Home** button and hold down the icon until it starts wiggling.
2. Tap **Delete** ⊖.
3. Go to **Settings** and find Sysco Counts.
4. Turn on the **Demo** mode.
5. Open the app.
6. Tap to log in (no login ID or password required).

frequently asked questions | getting started

How do I transition from the demo to live mode?

To transition from the demo to live mode, complete these steps.

For the iPhone:

1. Delete the instance of the app that is running by double-tapping the **Home** button and holding down the icon until it starts wiggling.
2. Tap **Delete** ⛔.
3. Go to **Settings** and find the Sysco Counts app.
4. Turn off the **Demo** mode.
5. Open the app.
6. Log in with the login ID and password for your Sysco Counts live account.

For the Android phone:

1. With the Sysco Counts app open, tap the menu icon.
2. Tap **Settings**.
3. Clear the **Demo Mode** check box.
4. Tap the return to app ↩. The Settings Changed pop-up displays.
5. Click **OK**.
6. Delete the instance of the app that is running by tapping the menu icon, then tap **Terminate**.
7. Relaunch the app.
8. Log in with the login ID and password for your Sysco Counts live account.

How do I start using the app?

Start with Manage Everything to set up and organize locations, categories, par groups, and non-Sysco providers. To access the Manage Everything screen, complete these steps:

1. Tap the **More** tab.
2. Tap **Manage Everything**.

Can I access the app in a browser via a laptop or desktop?

The Sysco Counts app is only available for tablets and smart phones.

frequently asked questions | getting started

How do I get familiar with the app?

Sysco recommends that you review the Help screens. To access Help:

1. Tap the **More** tab.
2. Tap **Help**.
3. Swipe right to view the next screen.
4. Tap anywhere to go back to the app.

Does the app work offline?

Yes, most features of the app function offline, but you need Internet connectivity to search for products in the Sysco Catalog or submit orders. All changes are saved to your device until you regain connectivity.

When should I use Refresh?

Sysco Counts saves all data changes to the server every 30 minutes. When you make several changes, Sysco recommends tapping **Refresh** to save those updates to the server.

How long does the initial synchronization or data update take?

Depending on your Internet connection, the update typically takes less than 10 minutes.

How do I delete an instance of the app?

1. Double-tap the **Home** button and hold down the icon until it starts wiggling.
2. Tap **Delete** ⊖.

Where do I access Help for the app?

1. Tap the **More** tab.
2. Tap **Help**.

Does the app work with a barcode scanner?

You can use the phone camera to perform barcode scanning.

To capture a barcode:

1. Tap the **Camera** icon 📷 to begin.
2. Position the green box around the barcode you want to capture.
3. Make sure the center red line is positioned on the barcode.
4. Once the barcode is positioned correctly, Sysco Counts captures and displays the item.

frequently asked questions | inventory

What items are initially shown in the inventory list?

Sysco Counts starts with the 8-week purchase history for both the inventory and order list. You can add more items to the list as well as from the Catalog screen.

Can I add products to the inventory list?

To add more items:

1. Tap the **Catalog** tab.
2. Tap Order Guide or Sysco Catalog.
3. Use **Search** or other filter to find the product you want to add.
4. Go to the Product Detail.
5. Tap **Add**.

Can I add a product to multiple locations for the inventory list?

Since each product line item is associated with one location, complete these steps to add the same product to multiple locations:

1. Identify which product you want to assign to an additional location.
2. Tap **Catalog** to find the product you want to add.
3. Tap **Add to Inventory**.
4. From the Add item screen, enter or complete this information:

   - Tap **Location** and select a different location than what is already in inventory.

   - Click **Back**.

   - In the **Quantity On Hand** field, type the quantity for the new location.

   - When finished adding item information, tap **Done**. Notice the green leaf moves to the Inventory, and the new inventory count changes to reflect the new item.

5. Tap **Inventory**. If you do not see the item, tap Refresh to view the item with the new badge.

Can I delete products from the inventory list?

To delete items:

1. Tap **Brand Indicator** .
2. Go to Product Detail.
3. Swipe down.
4. Tap **Delete**.

frequently asked questions | inventory

Can I generate the Inventory Value Report using the purchased price?

Currently, the Inventory Value Report uses the current day's price. The purchased price will be available for this report in a future release.

Can a decimal point be used for the inventory on hand?

Always enter the case quantity in three digits to accurately capture on-hand quantities and inventory count. Once you enter the three-digit quantity, the decimal point is automatically placed to the left of the last two digits.

Does the app support inventory for multiple accounts on one device?

Yes, you can do inventory for one account then switch to a different account on the same device.

How do I set up my non-Sysco item correctly and save?

The item must have a UPC and Category entered. Then enter the Pack and Size (if known) with "/" between them. In the **Pack** field, only enter a numeric quantity so that the item saves correctly. The **Pack/Size** field defaults to 1/1, if you do not know or enter the quantities.

Can I edit the inventory unit/order unit for non-Sysco items?

You can set the inventory unit to each (EA), case (CS), or pound (LB).

How do I get my non-Sysco item to calculate inventory count correctly?

To calculate the inventory count correctly, enter at least the Pack when the unit is each (EA) or Weight if the unit is pounds (LB). Non-Sysco items do not include catch weight, and size is not part of the equation.

frequently asked questions | inventory

Why is the order quantity for non-Sysco items different than I expect?

When you add non-Sysco items, ensure that you define how many individual items are in the case. By doing so, your inventory and ordering quantities are in sync and the pricing calculates correctly.

Simply, take your inventory by case or quantity sold and define how much of one case is on-hand. For example, if you are taking inventory of your wine, which has 12 bottles per case and have six bottles on-hand, type **050** in the **On-Hand** quantity field.

When the on-hand quantities and inventory count are set to each (EA), enter the number of individual items. For example, if you are taking inventory of your wine, which has 12 bottles per case and have six bottles on-hand, type **6** in the **On-Hand quantity** field.

To define the Pack/Size:

1. Tap **More**.
2. Tap **Add Non-Sysco Item**.
3. In the **Brand** field, type or select the brand name.
4. In the **Location** field, type or select the name of the location.
5. Complete the remaining inventory and ordering information.
6. Scroll down to the Product section.
7. In the **Pack/Size** field, type the quantity of items sold in a case.
8. If the item is sold by the pound, enter the weight.
9. Then select the appropriate inventory unit for this item from the **Inventory Unit** field.

frequently asked questions | ordering

How long does it take to receive an order confirmation?

Once you submit the order, it typically takes about two minutes to get the order number.

Do I receive an email confirmation for the order?

Yes, if your email address is entered under **My Profile**.

To keep informed about an order or changes to an order, enter your email address. Complete these steps:

1. Tap the **More** tab.
2. Tap **My Profile**.
3. In the **Email** field, type in your email address.

Does the order show up in eSysco or Sysco Market?

Sysco Counts orders will automatically show up in Sysco Market for SAP, but do not integrate with eSysco or Sysco Market for SUS.

Does the app handle out-of-stock items?

Sysco Counts displays a banner next to items with a specific stock type to provide information at a quick glance. If the requested item is no longer available, Sysco Counts displays a suggested replacement for an item that is out of stock.

Can I view the third line description?

This feature will be available in a future release.

Can I view nutritional information?

This feature will be available in a future release.

Can I select the delivery date?

When you submit an order, you can change the default scheduled delivery date to a future date on your delivery schedule.

frequently asked questions | managing everything

How do I create a location?

To create a location:

1. Tap the **More** tab, then tap **Manage Everything.**
2. In the Locations panel, tap ➕.
3. Name your location.
4. When finished, tap **Done**.

How do I organize locations?

To organize locations:

1. Tap the **More** tab, then tap **Manage Everything**.
2. In the Locations panel, tap **Edit**.
3. To edit, complete the step that best describes what you want to do:

    - To move, tap and hold ▤ next to the location you want to move and drag to new location.

    > **Note**: If you're using an Android phone, tap ⊕, then tap the new location where you want the item to be located.

    - To remove, tap **Delete** ⊖.

    - To rename, type the new name in the location field.

4. When finished, tap **Done**.

How do I sequence items in a location?

To sequence the list of items within a location:

1. Tap the **More** tab, then tap **Manage Everything**.
2. Tap the location that you want to work with.
3. Tap and hold ▤ for the item you want to move and slide up or down in the list.

How do I move items from one location to another?

To move items to another location:

1. Tap the **More** tab, then tap **Manage Everything**.
2. Tap the location that you want to work with.
3. Select the check box for the item or items you want to move.
4. Tap **Move To**.
5. Select the new location for the items and tap **Move**.

frequently asked questions | par groups

What is a par group?

A par group is the name of a list of items with par levels. The par level is a marker in inventory levels that indicates replenishment is necessary. It indicates the amount you want to have in on-hand inventory for that item.

For example, the first Monday of every month you have an all-you-can-eat shrimp feast. To accommodate this event, you can create a par level group called Shrimp Monday that includes all the items you need for the shrimp feast.

Par level groups let you create pre-set quantities for placing orders quickly and efficiently.

How do I create a par group?

To create a par group:

1. Tap the **More** tab, then tap **Manage Everything**.
2. Tap **Par Groups**, then tap ➕.
3. Name your par group.
4. When finished, tap **Done**.

How do I organize a par group?

To organize par groups:

1. Tap the **More** tab, then tap **Manage Everything**.
2. Tap **Par Groups**, then tap **Edit**.
3. To edit, complete the step that best describes what you want to do:

   - To remove, tap **Delete** 🚫.

   - To rename, type the new name in the location field.

4. Select the newly created group. The list displays.
5. From the list, enter the par level for the item you want to add to your par group.
6. When finished, tap **Done**.

How do I use and apply a par list for ordering?

To use and apply a par list:

1. Tap the **Ordering** tab.
2. Tap **Select Par**.
3. Tap the par group you want to use. Only the items from that par list display.
4. Tap **Apply to Order**.
5. To view all the items for the order, tap the shopping cart.
6. When finished, tap **Submit**.

How does Apply to Par Order work?

By default, the app uses each (EA) and pound (LB) (if catch weight item) for inventory unit.

Note: You can select each (EA) for your par level when the item is splitable.

When you select a par and apply to order, the app takes the on-hand quantity that is in EA and LB and converts to what is needed in case (CS). If you want to change the inventory unit to CS, you can.

To change the inventory unit to CS, tap **Brand Indicator** to view the Inventory Detail. Update the inventory unit.

If you change the inventory unit to CS, then change the **Inventory Unit/Order Unit** field to **1**. Otherwise, the calculation does not work properly when applying to par.