Inventory Count and Purchase Plan

Usable = on hand - reserved for booked events. Need = par - usable. Order = need / count units per purchase unit, rounded up. Blank counts are flagged, not treated as zero.

Count date _____ **Counted by** _____

Location _____

Item	Category	Count unit	On hand	Reserved for booked events	Usable	Par level	Need	Purchase unit	Count units per purchase unit	Purchase units to order	Supplier	Price per purchase unit	Order cost	Status

Planned order cost

Rows with missing inputs

Items short for booked events

The planned order cost leaves out rows with missing inputs. Fix those rows before you order.
Sample: heavy cream has no count entered, so it is flagged rather than ordered as if stock were zero. Eggs are short for booked events (reserved is more than on hand).

How to use this template

1. List each item with the unit you count it in, and the purchase unit you buy it in with how many count units are in one purchase unit. No conversions are assumed.
2. Enter the count on hand and the quantity reserved for booked events (enter 0 if none). Blank counts are flagged, never treated as zero.
3. Set a par level for each item: the quantity you want available after reservations.
4. Purchase units to order round up to whole units, and order cost uses the price per purchase unit.
5. Check the status column before ordering: it flags missing inputs and items short for booked events.