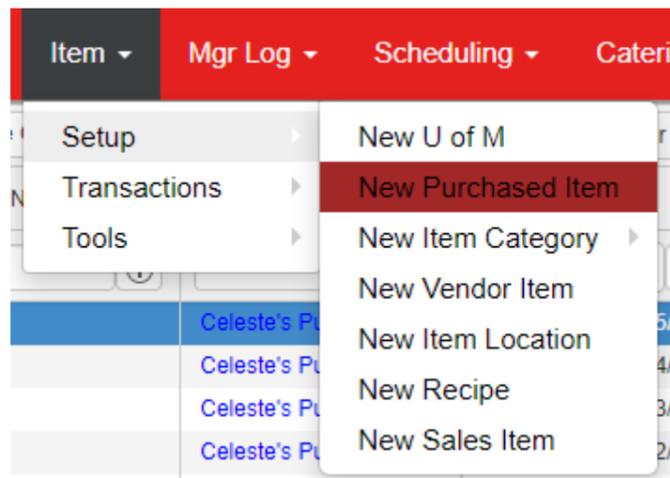# Adding a New Purchased Item

Dec 29, 2021 14:56

Items are part of the Inventory section of the Operations module of Restaurant365. There are two ways to add a new Purchased Item in R365: create a new Purchased Item or import new Purchased Item information using the Import Tool.

Create a New Purchased Item

To begin the process of adding a new inventory item to Restaurant365, hover over 'Item' in the top ribbon and then 'Setup'. Select 'New Purchased Item', and then the 'New Purchased Item' window will appear.

General Tab

1) Name - Enter the Name for the Purchased Item as it will appear throughout R365. Purchased Item Names should be unique, but it is not required

2) Type - This value is read-only and cannot be modified. It identifies the Item as a Purchased Item

3) Measure Type - This will identify the manner in which this item is measured throughout the system (Vendor Items, Item Locations, Recipe, and Inventory Transactions). Once set, Units of Measure can then be assigned. Ensure that the Measure Type is entered correctly because once the Item record is saved, the Measure Type will be locked and unchangeable. However, copying this item record will enable the Measure Type to be editable. These types include:

- Weight
- Volume
- Each
    - **Note:** To connect different Measure Types, you must set an equivalency since equivalencies will not be automatically created

4) Number (optional) - Enter a Number value for the Purchased Item. This value can be useful for filtering and sorting purposed in the 'Items' list. All alphanumeric characters are accepted in this field

5) Description - Enter a description for the Purchased Item. Similar to 'Number', this value is available on the 'Items' list

6) Active Checkbox - This box is checked by Default and indicates that this Purchased Item is Active in R365 and can be selected on AP Invoices, and counted on Stock Counts. When an Item is discontinued, uncheck this box to remove the Item from Item Selectors throughout R365

7) Actual as Theoretical Checkbox - Check this box to us the Actual Usage for this Item in place of the Theoretical Usage (via Recipes mapped to Menu Items) on the **AvT Report** **(https://help.restaurant365.net/en/support/solutions/articles/12000043210--actual-vs-theoretical-analysis-troubleshooting-variances)**

8) Commissary Item Checkbox - Check this box if this Purchased Item will also be available for ordering on a **Commissary Order** **(https://help.restaurant365.net/en/support/solutions/articles/12000039067-commissary-commissary-orders)** in the **Commissary Feature** **(https://help.restaurant365.net/en/support/solutions/articles/12000039068-commissary-overview-security)**. When Checked, the 'Sales' tab will appear on the Purchased Item record. Click here for more information on how to setup **Purchased Items as Commissary Items** **(https://help.restaurant365.net/en/support/solutions/articles/12000039064-commissary-items)**

9) Available in AR Invoice - Check this box if this Purchased Item will also be available as a Sales Item on the **AR Invoice** **(https://help.restaurant365.net/en/support/solutions/articles/12000038984-ar-invoice)**. When Checked, the 'Sales' tab will appear on the Purchased Item record. Click here for more information on how to setup **Purchased Items as Sales Items** **(https://help.restaurant365.net/en/support/solutions/articles/12000038981-sales-item-record)**

10) Catering Item Checkbox - Check this box if this Purchased Item will also be available for sale on Catering Menus in the **Catering Module** **(http://help.restaurant365.net/support/solutions/articles/12000038874-catering-overview-security)**. When checked, the 'Catering' tab will appear on the Purchased Item record. Click here for more information on how to setup **Purchased Items as Catering Items** **(https://help.restaurant365.net/en/support/solutions/articles/12000038901-catering-items)**

11) Select Recipe Image Button - This button is not applicable to Purchased Items and is only used on Recipe Items
12) Upload File Button - Attach a file to the Purchased Item record using this button

Inventory Cost Tab

Next, select the 'Inventory Cost' tab and fill out the required fields.

1) Item Category 1 - Enter an Item Category 1 for the Purchased Item. This should be the main category, such as 'Food'. Click here fore more information on Item Categories (https://help.restaurant365.net/en/support/solutions/articles/12000039196-item-categories)

2) Item Category 2 - Enter an Item Category 2 for the Purchased Item. This should be the secondary category within the main Category (Category 1), such as 'Meat'. Click here fore more information on Item Categories (https://help.restaurant365.net/en/support/solutions/articles/12000039196-item-categories)

3) Item Category 3 - Enter an Item Category 3 for the Purchased Item. These Categories are used infrequently but can represent the more detailed type within the Category 2, such as 'Beef'. Click here fore more information on Item Categories (https://help.restaurant365.net/en/support/solutions/articles/12000039196-item-categories)

4) Inventory U of M* - Select the Primary Reporting U of M for the Purchased Item. Click here for more information on **U of Ms (https://help.restaurant365.net/en/support/solutions/articles/12000039182-unit-of-measure)**

5) Inventory Cost - this field will contain the Cost associated with the Inventory U of M and will be updated based on the Cost Update Method set on the 'Purchasing' tab

6) Count U of M 2 - Set a secondary Count U of M for the Purchased Item. Additional count units of measure allows you to count by multiple U of M during a **Stock Count (https://help.restaurant365.net/en/support/solutions/articles/12000039203-stock-count-overview)**

7) Count U of M 3 - Set a tertiary Count U of M for the Purchased Item. Additional count units of measure allows you to count by multiple U of M during a **Stock Count (https://help.restaurant365.net/en/support/solutions/articles/12000039203-stock-count-overview)**

8) Cost Account* - Select the GL Account where the Costs associated with this Purchased Item will be recorded (on AP Invoices, Stock Count Inventory Adjustments etc.)

9) Inventory Account* - Select the GL Account where the Inventory Asset Value associated with this Purchased Item will be recorded (on AP Invoices, Stock Count Inventory Adjustments etc.)

10) Waste Account - Select the GL Account that you want to Debit upon entering a **Waste Log (https://help.restaurant365.net/en/support/solutions/articles/12000039191-entering-a-waste-log)**

11) Key Items - Check this box if this Purchased Item is considered a 'Key Item'. Key Items can be set on various Inventory reports to more quickly review the key / strategic inventory items

12) Item Cost Graph - As this Purchased Item is purchased over time, this graph will display each the price at time of purchase in a running line

Purchasing Tab

Select the 'Purchasing' tab and enter the Default Purchase U of M and the Cost Update Method

1) Default Purchase U of M - This selection shows what the U of M was as received from the Vendor
2) Cost Update Method - The selected method determines how Inventory Costs will be calculated for each item. Click here to learn more about **Cost Update Method options (https://help.restaurant365.net/en/support/solutions/articles/12000083377)**

You may enter the optional fields of Par Qty, Brand, and Yield Percent as well if desired.

U of M Equivalence Tab

If your 'Default Purchase U of M' and 'Inventory U of M' are different types then you will need to update the 'U of M Equivalence' tab. For example, if your Purchase U of M is '4/1 Gal' (a Volume U of M) and your Inventory U of M is Jug (an Each U of M), you will need to tell the system how many Jugs are in the Purchase U of M.

For this example, 'Volume Qty' would be 1, Volume U of M would be '4/1 Gal' and 'Each Qty' would be 4, 'Each U of M' would be 'Jug'. This will tell the system that there are 4 Jugs in the 4/1 Gal package. Click here for more information on **Unit of Measure Equivalence (https://help.restaurant365.net/en/support/solutions/articles/12000039183-unit-of-measure-equivalence)**.

The four remaining tabs are informational: 'Transactions' (shows the list of transactions that has this item), 'Recipes On' (shows the recipes this item is used in), 'Vendor Items' (shows all the Vendor Items created for this item), and 'Item Locations' (shows all the item locations created for this item).

Lastly, hit the 'Save & Close' button, and your new item is added to the inventory list. Be sure to go into the respective stock count templates for each location and add the item to the storage location where it will be counted.
To see a list of all existing items, be sure you are in the 'Operations' module in the Navigation Pane, and then click on 'Items' in the Inventory section.

Import a New Purchased Item
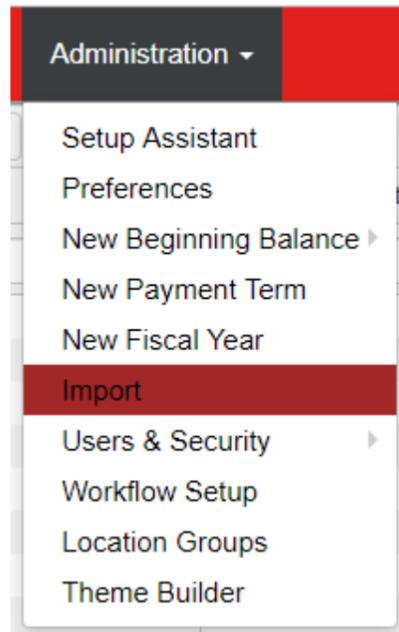
To import new Purchase Item information into R365, hover over 'Administration' in the top ribbon and click 'Import'.
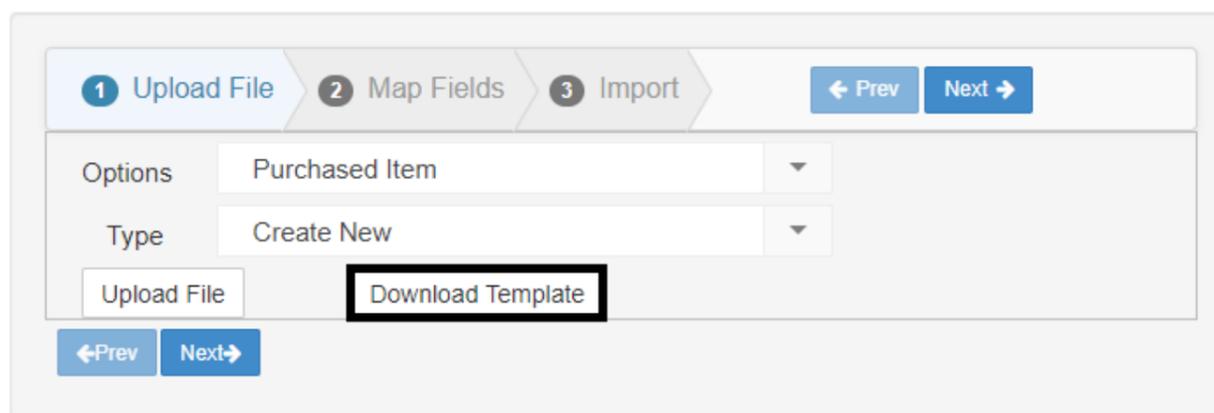
A new Import window will open. Select 'Purchased Item' in the 'Options' drop-down menu and then select 'Create New' in the 'Type' drop-down menu. Clicking 'Download Template' will download a template for you to type in new item information.

K	L	M	N	O	P	Q
Price Type	Markup %	Commissary Item	Type	Count U of M 2	Count U of M 3	All Location
			1			

One required field that is not included on the template is the 'Type' column. This will need to be added manually before the 'Count U of M 2' column. This column also requires a numerical entry and '1' indicates that it is a Purchased Item, as shown above.

When finished editing a template, save and upload the file back into R365 by clicking the 'Upload File' button next to 'Download Template'. The above window will appear, allowing you to select your CSV file and click 'Next' [Next➜] to move on to the 'Map Fields' tab.

The next page will open with all of the column headers from the Import file. Review the field names to make sure that they match the column names from the template, and then click 'Next' to move on to the 'Import' tab.

On the 'Import' tab, click the 'Import' button in the system to create your new Purchased Item. A green pop-up window will appear if the import was successful, and then click 'Finish'.

Review our **Import Tool** (https://help.restaurant365.net/en/support/solutions/articles/12000039158-import-tool) Article if you have additional questions about importing a file or addressing issues surrounding an unsuccessful import.

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