

Changing Inventory Item Class

Changing item classes to facilitate prep/menu recipe construction involves affecting both the master and restaurant specific data on the product. This will cause a major change in your inventory item and should not be done unless completely necessary.

Changing item classes prior to inventory purchases or inventory counts is a straightforward process. Follow Steps 1 & 2 and your items will be corrected.

If you are changing item classes on products after you have purchases, the products then follow steps 1, 2 & 3

Item class changes should always take place at the very beginning of an inventory period, whenever possible

1. Master Inventory Item Class

Adjusting the item class – When selecting the item class, it is important to determine how you wish to inventory the product and how you will be using it in recipe construction. Liquids are almost always ‘volume’ and most other products will be ‘weight’. Few food or beverage items will fall under the ‘Count’ item class. This is a global setting that will affect the status of the item in all entities. You will be warned about potential issues and be required to type confirmation.

The screenshot shows the 'Master Inventory Items' form for item 144, 'CHEESE Cream cheese'. The 'Item Class' dropdown menu is highlighted with a red box and currently shows 'Weight'. Other fields include 'Base Unit: Weight Oz', 'UPC', 'Item Options' (Available, Catch Weight, Limit Counts To Inv. Units), 'Unit Conversion (optional)', and 'Inventory Levels' (Level 1: Food, Level 2: Dairy, Level 3).

Item class conversions –You may enter in an item class conversion if your current item class is Weight or Volume and you wish to use both options for the product. Or, if the item is going to be purchased in a single unit of measure (i.e. bottle size) at all locations then you can setup an item conversion from count to volume/weight. If you add a conversion for recipe writing, then you can skip steps 3 & 4. Additional documentation regarding item class conversion can be found at the end of this document.

The screenshot shows the 'Master Inventory Items' form. The 'Item Info' section includes Item # 24 and Description CHEESE Cotija. The 'Item Class' section shows 'Weight' as the Item Class and 'Weight Oz' as the Base Unit. The 'Unit Conversion (optional)' section is highlighted with a red box and shows a conversion from 'Volume' (10.000 # of cup) to 'lb' (2.7500 # of lb). The 'Inventory Levels' section shows Level 1 as 'Food', Level 2 as 'Dairy', and Level 3 as 'Catch Weight'.

2. Restaurant Inventory Detail

Inventory Unit – when you change an item class it will break the previous inventory unit because these are related directly to the class of the item. You will need to select your new unit of measure (this smallest inventory units size you would ever accurately want to count it by)

The screenshot shows the 'Restaurant Inventory Detail' form. The 'Inventory Unit' dropdown is highlighted with a red box and shows '54'. The form also displays 'Inv. Unit Cost' (1.562000), 'Base Unit Cost' (0.09762500), 'Last Cost Update' (3/19/2013), and 'Theo Qty. On Hand' (5.0000 lb). There are several checkboxes on the right side, including 'Active', 'Inventoried', 'Order Counts', 'Hot Item', 'Bid Item', 'Lock Price', and 'Lock Purchase Unit'.

Purchase Units – When inventory units change, it is often the case that purchase units must be redefined. Example – the previous inventory unit was ‘EACH’ so the purchase unit read as ‘Case = 5/Each’. With a new inventory unit of ‘Lb.’ the purchase unit should read ‘Case = 20/lb.’

Purchase Units						
Container	=	Inv Units per Container	Inventory Units	Purchase Unit	Default	Split Qty
Case	=	20.00	lb	Case=20/lb	<input checked="" type="checkbox"/>	<input type="checkbox"/>
* (click here to add)					<input type="checkbox"/>	<input type="checkbox"/>

3. Adjusting Posted Vouchers

When you change the item class of an inventory item, it will change the base unit of previous purchases. When changing item classes, the quantity of the base units do not change. Example – previously a case of John Hue Cabernet = 12 each. Now that the class has changed, it thinks we only received 12 ounces of wine but a case = 12 750ml bottles, for a total of 304 volume ounces. This has a huge effect on your current inventory valuation. You will need to change the 12 to 304 volume ounces to accurately cost this item.

Item #	Item Description	Entity #	From Date	To Date	Voucher Type	Display Type
148	WINE Cabernet John Hu				Invoices	Conversions
Vouchers (2 records)						
Drag a column header here to group by that column.						
Voucher #	Doc Typ	Vendor	Apply Date	Purchase Unit	Base Units per Pur Un	Base Unit
V-001-0002191	INV	Republic Beverage	01/17/2018	Case=12/Bottle	12.00000000	Volume Oz
V-001-0002190	INV	Republic Beverage	02/14/2018	Case=12/Bottle	12.00000000	Volume Oz

***If you are using a weighted average cost valuation OR you do not anticipate purchasing the product in question prior to your next inventory posting follow step 4

4. Valuation Cost Adjustments

When using weighted average as your valuation method, the previous inventory quantity and value is used in calculating the current value of your products. When you change the base units of your item it will throw off the per item valuation in your previous inventory count.

To fix the valuation moving forward you will need to give your item a clean starting point. You can go to: Inventory>inventory counts>valuation cost adjustment. This tool will allow you to

override the calculated value of your product for your upcoming inventory posting. This will reset your values for upcoming inventory counts and provided that you continue to purchase the item with correct valuations, your item will be valued correctly.

Valuation Cost Adjustments
x

Save Changes Print

Cost adjustments entered here will be used as the inventory costs for specified items on the next posted valuation count. Note that any costs displayed on the Valuation Count entry screen itself will not display the costs below, however these adjusted costs will be used in posting, and can be verified in the Pre-Post report.

Export to Excel

Item #	Item Description	Inventory Units	Cost	Created By	Created	Modified By	Modified
132	BROCCOLI Florets	lb	\$0.750	compeat	04/10/2013	compeat	04/10/2013
* (click here to add)							