



## Add an Item

Background: Items are used as ingredients to build recipes. Establish and document your standards and process prior to building your own items in the database.

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### To Do and Notice:

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1. Navigate to **Item Maintenance** and select [Add a New Item](#).
2. Enter the following information:
  - **Ingredient Name** – Follow established naming conventions and abbreviations
  - **Purchase Unit** – Quantity in which you typically purchase the product  
**Notice:** The system will automatically calculate the weight, which you may edit if needed.
  - **Short Name** – Leave blank, the system will create one
  - **Key Name** – Leave blank, the system will create one
  - **Product Group** – select from drop-down list
  - **Purchase Group** – select from drop-down list
3. Click **Next**.
4. Change item details on each tab as desired.

**Notice:** See reverse side for details on each tab.

## General Info

1. The following areas are open for editing:
  - **Common Name** – used by kitchen staff; displayed in Production Recipes
  - **Short Name** – abbreviated name
  - **In Use Status** – set by the system once the item is used in a recipe

**Notice:** The **Formal Name**, **Course**, **Prep Area** and **Portion Unit** fields are typically utilized for recipes.

## Measures

See **Unit of Measure** Quick Guide for details on how to add a new unit of measure or delete an existing unit of measure.

## Production

2. The following areas are open for editing:

**Notice:** The first column of fields are typically utilized for recipes.

  - **Preparation Technique** – select from drop-down list
  - **Cost Yield** – loss during preparation, before cooking, expressed in decimals i.e. 0.75=75%
  - **Advanced Preparation** – advanced day(s) to prepare item i.e. dicing onions
  - **Advance Withdrawal** – advance day(s) to pull item from storage. i.e. freezer

## Purchasing

See **Edit Vendor Items** Quick Guide.

## Inventory

See **Assign Storation Location and Bins** Quick Guide.

## Nutrition

See **Link a Nutrition Item** Quick Guide.

## Traits

### Add a Trait

3. Select an option from the drop-down list.
4. Click **Add**.
5. Click **Save**.

### Delete a Trait

6. Click the checkbox in front of the item you wish to delete.
7. Click **Delete Checked**.
8. Click **Save**.

**Notice:** The Service and Replacements tabs are utilized for Recipes and are not applicable to an item.

**So What?** Items are linked to vendor products available at your division. Don't forget to select products that correspond with the general items added at your facility under the Purchasing tab.