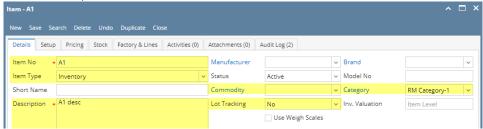
How to Add Inventory Type Item to be used as Ingredient in a Recipe

- 1. From Inventory module > click on Items menu.
- 2. The Search screen for Items will be shown. Click New toolbar button.
- 3. This will open a new Item screen.
- 4. In the Details tab, fill in or select the ff.



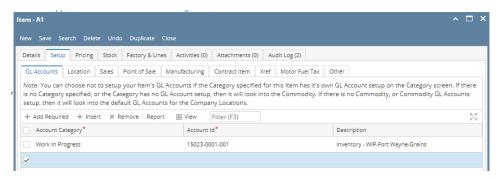
- a. Enter Item No and Description.
- b. In the Type field select Inventory type.

The **Inventory item type** is used for regular items you purchase/sell. This type is also used for items used as ingredient to a recipe. This item type tracks stock quantities.

- c. In the Lot Tracking field select whether the item is Lot Tracked or not.
 - i. Select Yes-Serial Number if the item is lot tracked and will use the predefined lot number from the Starting Numbers screen.
 - ii. Select Yes-Manual if the item is lot tracked and will manually enter the lot number.
 - iii. Select No if he item is not lot tracked.
- d. Select Category.

Category is used to group together items that are of the same kind. Doing so will be easier to assign Tax and GL Accounts to items since you will not have to assign/add it on each and every item. Instead, Tax will be assigned and GL Accounts will be added to the Category, then once Category is selected for the item, Tax and GL Accounts will be applied. Though you can still define Tax Class and GL Accounts at item level.

Ex. GL Accounts for selected required accounts can be modified at Item Level.



Note that for Item with Inventory type and will be used as ingredient to a recipe, it is required that you have **Work in Progress GL account** setup. You can setup that at Category Level or Item Level like shown in the screenshot above.

e. Select Commodity.

Commodity is used to group together items that are of the same commodity. This is required if you will use the item in a Contract, either in Purchase Contract or Sales Contract. It is in Commodity where you will configure the Unit of Measure. Once Commodity is selected for the item, it will auto-populate the item's Unit of Measure grid. This is handy since you will not have to add Unit of Measure to each and every item. Though you can still define Unit of Measure at item level.

- f. Fill in other information as needed.
- 5. Setup Unit of Measure. See How to Setup Item UOM.
- 6. Setup Item Locations. See How to Setup Item Location.
- 7. Setup GL Accounts. See How to Setup GL Accounts for the items.
- 8. Setup Tax for the item if it is taxable. See How to Setup Tax for an item.
- 9. Setup Pricing. See How to Setup Item Pricing.
- 10. Setup Pricing Level as needed. See How to Setup Pricing Level
- 11. Setup Special Pricing as needed. See How to Setup Promotional Pricing.
- 12. Save the record. You can click the **Save toolbar button** to save it. In case you miss to click this button and you click the **Close toolbar button** or the **x button** at the top right corner of the screen, i21 will prompt you if you would like to save it before closing the screen.