Standard Operating Procedure
Provisions – Item Creation

Creating a New Item – **Make sure to read pages about adding CTO and Freight!!**

1. Go to File Maintenance → Double click on Inventory Master
2. Search for a similar item by using the magnifying glass and sort by Description 1 or type a key word in capital letters and hit F2.
3. Write down the number that you're using as a template for this new product.
4. Use the singular forward or back arrows above the Item Number field to look for gaps in the sequence. Any number in the gaps are available to designate as your new product number.

5. Clear the Item Number field and input the number you're using as the template.
   a. Please review and verify that the number you're using as a template is picked, processed, and invoiced similarly to the new number you are creating → Examples: catch weight that's invoiced by the lb., standard weight invoiced from vendor by the EA, raw material sold by the case and used as a production item, etc.
6. Press "Dupe".
7. In the New Item section of the pop-up, enter the new item number and copy the acronym listed above. If the acronym should read differently, alter it here based on line 1 of the description for your new item - up to 16 characters. Press Okay in the top left.

8. Your new item number is now created with the same rules and measurements as the product you duplicated. Go through every tab and review the information.

1.) GENERAL TAB

Item Number: 000001 [Key] [Mfr]	Description 1: DO ONT USE***ONLY USE FOR TEST
Acronym: USE FOR TESTING	Description 2: ONLY USE FOR TESTING

1. General | 2. Stock | 3. U/M Detail | 4. Valuation | 5. Sales&Usage | 6. Specifications | 7. Miscellaneous | 8. Miscellaneous2 | 9. Whs. Mgmt.

—Product Codes—

		—Classification Codes—				
Major Code:	060	Class Code 1:		Auth Family Code:		Alpha Seq:
Minor Code:	835	Class Code 2:		Std. Unit Freight:	.0000	Labor Code: STD
Sequence:	0018	Class Code 3:		Add'tl Items Group:		Labor Units: Min
		Class Code 4:		Primary Vendor:	19120	
Part Code:	P	Commodity Code:	835	Location:	010678B03	
Status Code:	AA	Material Code:	M	Catalog Print Code:		
Buyer:	10	Night Pick Item:	N	Standard Yield % :	100.00	
Department:	L	Major Code:	L	Average Yield % :	.00	
Origin Code:		Attribute 5:		Broker Commissn Code:		
Case UPC:				White Board Category:		
UPC Code:		[Create UPC]		Taxable Code:	No	
GTIN Number:		[Create GTIN]		Effective Date:	00/00/00	
X-Ref Item:				Effective Date Reason:		

Checkboxes (right side):
- Print on Work/Pick ☐
- Update Last Cost ☑
- Kit Exclusion ☐
- Lot Control: Yes
- Disallow Oldest First ☐
- Catch Weight Item ☐
- Portion Control Item ☐
- Catch Weight Test: ☐
- Box/Grade Prompt ☐
- Transfer Only Item ☐
- Fresh/Frozen/Other: ☐
- Don't Allow Zero Price ☐
- Restricted Item ☐

- Major Code - Sales Class
- Minor Code - Commodity Code
- Part Code – Choose either A, M, or P.

A - Manufactured Assembly = Produced items that are cut in house.
M – Miscellaneous = Used for packing fees & items that are not sold (i.e. boxes, toilet paper)
P – Parts = Items that we buy and are NOT produced at D&B

From:	P	
Sort by:	Fld#1(4) + Part Code(10) (Default)	
Part Code	**Description**
A	Manufactured Assembly
L	Labor
M	Miscellaneous
P	Parts
S	Sub Assembly
U	Units

- Status Code –

AA – Active Item = Choose if item is available for sale.
AD – Active/Discontinued = Choose if item is discontinued by vendor or D&B but we have stock remaining.
CN – Coded NonStock PreOrders = Choose if item requires a special.
IA – Inactive Item = "Locked" item. Not available for sale.
NP – Inactive; allow purchases = Allows for orders to be written for products arriving in the future.

From:	AA	
Sort by:	Fld#1(4) + Status Code(10) (Default)	
Status Code	**Description**
AA	Active Item
AD	Active/Discontinued Allow Sales
CN	Coded NonStock PreOrders
IA	Inactive Item
NP	Inactive; allow purchases

- Buyer – Enter your buyer number that corresponds with this product.
- Department – Choose which list this product's tickets should print on.
- Commodity Code – Choose appropriate commodity code (this needs to be the same as the minor code)
- Material Code – Choose where the product is located at D&B or if the product requires dry ice to travel.
- Night Pick Item – Enter Y (Yes) or N (No)
- Primary Vendor – Use the magnifying glass to search for the correct vendor. Choose D&B if this product is fabricated in house.

- Location – A location will be added upon receipt. If we have not received this product yet, enter 0110 as the location.
- Standard Yield % - Enter the yield for this product.
- Update Last Cost – Update last receipt cost for this item. Check this box.
- Lot Control – keep this as YES
- Catch Weight Item – if item has a catch weight, put an X in this box
- Catch Weight Test – if item has a catch weight, put a T in this box

2. STOCK TAB - Most information will populate with receipt and sales of the product.

- If your product is a CN – select your product warning in this screen.

##	PRE ORDER 1PM CUTOFF 2 DAY LEAD TIME
%	PRE ORDER 2 WEEK PLUS LEAD TIME
&	NON STOCK ORDER BY 1:00PM
*	SHELLFISH MUST BE ORDERED BEFORE 10:30AM
?	PRE ORDER 1 WEEK LEAD TIME
@	CONTACT BUYER PRIOR TO ORDERING
TBD	TO BE DISCONTINUED

3. U/M DETAIL TAB

Unit of Measure
- Stock UOM
- Purchase UOM
- Conversion Factor = How many stock UOMs are in a purchasing UOM?
  Ex. If the item is stocked by the case and purchased by the case, then the conversion factor equals 1.
  Ex 2. If the item is stocked by the each but purchased by the case (4 EA/CS), then the conversion factor equals 0.25.

Pricing Unit
- Unit of Measure – Choose which UOM will be used to sell the product.
- Conversion Factor – How many pricing units are in a stocking unit?

Alternate Unit of Measure
- Unit of Measure + Change + Default
  Change – A checked box allows the UOM to be changed when the Default alternate UOM is set as the Sell UOM. If Default box is checked and Change box is left blank, the product will only be sold at the Alternate UOM.
  Default – Check box if you want the Default Alternate UOM to be the Selling UOM
- Conversion Factor – How many Alternate UOMs are in the Stocking unit?
  M (multiplier) – Must use M for catch weight items. Ex. If 1 case has 4 bags in it, the conversion factor is X * 4 = 1, X=0.25
  D (divider) – Use for standard weight items. Ex. If 1 case has 4 bags in it, the conversion factor equation is 4 / 1 = 4.
- Pack Size – Note the pack size here, this will appear on sales orders.

Alternate & Pricing Unit -2
- Fill this section out if there's a secondary alternate UOM.

4. VALUATION TAB

Standard Price and Base Price are the most important fields to fill out in this Valuation tab. Most other fields will auto-populate over time. Here's a diagram of Provisions' pricing structure and terminology:
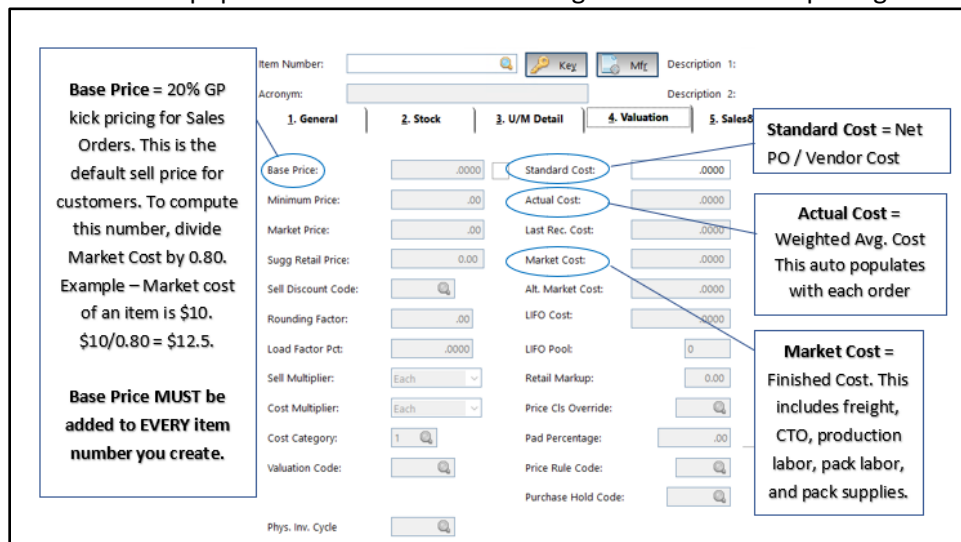
- Price Rule Code – Commodity Code

5. SALES & USAGE TAB – this section will update with inventory receipt and sales. No fields needed here.

6. SPECIFICATIONS TAB

Case Specifications
- Package Qty – The quantity of these items that make up a standard case. If box is checked, user can select package quantity during production. Quantity will be in multiples of stocking unit.

Pallet Configuration
- Enter Cases per Layer, Layers High, Cases per Pallet, and Cases per Master
- Fill in Pallet Height, Pallet Width, and Pallet Depth if info is available.
- Standard Weight – Standard Weight per unit.
- Average Weight – This will populate based on sales of the item.

C.O.O.L / M.O.P
- Harvested – Search for and enter the 3-digit country code for the origin of this product.
- Organic/ABF – Choose an attribute if applicable.
- All Natural – Enter YES or NO

- C.O.O.L Compliance – Leave this checked because we are using the C.O.O.L section for product attribution/certification notes.

7. MISCELLANEOUS TAB

- Substitute Item – Enter an alternative item to sell in the case that this product is not available.
- Sell Negative – Leave a check mark here to allow inventory to be sold into a negative available.
- Cubes – Used to determine how many labels are required per unit ordered. If it is a case only item, cubes will always be 1. If the item has an alt UOM, the cubes will be how many of the alternate = 1 cs.
- Brand – Choose the appropriate 4-digit band code. If the brand is new, see IT.

8. MISCELLANEOUS 2 TAB – no fields to fill in here

9. WHS. MGMT TAB

- Barcode Lbl Type – Pick Pallet, Case, Pallet & Case, or Virtual Pallet.
- WMS Pre-Pick Label – Pick if this item should default to pre-pick mode (items with a case break)
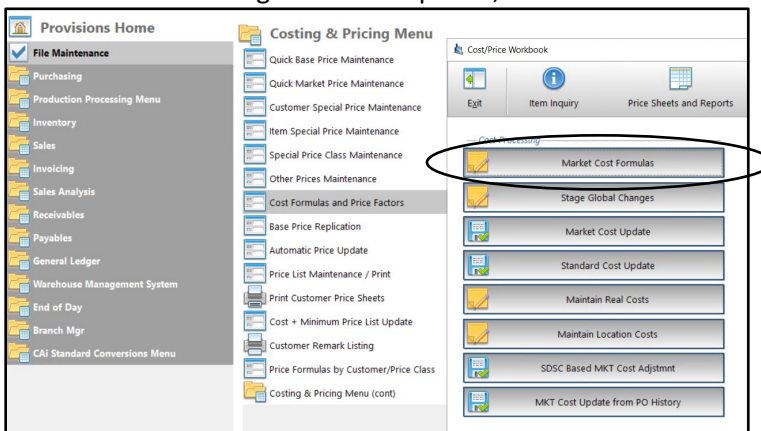
IMPORTANT FINAL STEP TO ITEM CREATION!!!

To add Freight, CTO, Production Labor, Packaging Labor, and Packaging Supplies to new item numbers –

1.) Go to File Maintenance → Costing and Pricing Menu → Cost Formulas & Price Factors
2.) Under Cost Processing column of options, click Market Cost Formulas

3.) Search for a similar item by using the magnifying glass (same vendor, similar product, similar production and packaging labor, and similar packaging supply cost). Alternatively, type a key word in capital letters and hit F2 to see a list of items that include the criterion. Double click on the item that is most similar to your new item in terms of freight, CTO, etc.
4.) In this example, I'd like to add freight to the new item number for 524347 CHICKEN STATLER 8-10Z so I'm choosing 524494 CHICKEN THIGH B&S 20# B&E.

	Type	Code	Item Number	Cost	Percentage	Amount	Function	Category	Table
0005	D		524494	3.17	100.00	.00	+	NET	
0010	A			.00	.00	.05	+	FRT	
0015	Y			.00	100.00	.00	/		
0020	P			.00	4.00	.00	+	COT	758
0025	A			.00	.00	.03	+	PAKL	758

5.) Click Copy and enter the new item number that you'd like to transfer this cost formula to. Or you can use the magnifying glass to search for the new item that you've created. Click Write to complete the process.

6.) If further adjustments are needed or adjustments are required for existing item numbers, click on the line that you'd like to adjust. Ex. Shows FRT highlighted, and you would enter the proper value in the Amount field.

7.) You can also add Categories into to the number setup.

D – Item Default Cost

A – Add

Y – Yield – When adding a yield, make sure to choose the divide option in the Function field.

P –Percentage of CTO. *Note – COT means CTO in this section of Provisions.*

(BCAT) Built Up Cost	D
FRT	FREIGHT
NET	NET PO
PAKL	PACKAGING LABOR
PRDL	PRODUCTION LABOR
SUPP	SUPPLIES

8.) Click Update to finalize the process.