



How to Create a New Item (via Duplication)

Summary

There are two primary means in which to create a new item:

1. Duplicating an existing item (if the brand is already established)
2. Using the brand creation wizard to create a new brand along with corresponding new items.

Options

We will discuss the first option here. For more information on the Brand Creation Wizard, please see Brand Creation Wizard.

The most important thing to remember when creating new items is to *duplicate an existing similar item*.

A “similar item” is defined as one that is of the same item group (e.g. finished goods) but also other more specific fields such as pack type. For example, if creating a new ½ BBL keg item, find another ½ BBL keg item to duplicate, not just any random keg item.

This point of duplicating an existing similar item cannot be over emphasized. There are a lot of minor connection points on each item that includes which GLs will be used when processing transactions, the warehouses available to the item, whether it's purchasable, sell-able or both. Whether it is being inventoried, or not. The pack types and process types associated with the item.

If a user creates one from scratch, rather than duplicating an existing item, there is a much higher chance that one of these minor points of contact is missed which will cause transnational or reporting issues down the road.

In order to create a new item, first pull up the Item Master Data window from Inventory > Item Master Data. In this example, we're going to create a new malt. Enter “rm” into the “Item No.” search window and hit Enter:

Item Master Data	
Item No.	rm
Description	
Foreign Name	
Item Type	
Item Group	
UoM Group	



A list of all raw malt items will display:

#	Item No.	Item Description	Item Gr...	Process ...	In Stock	Inac...
1	RM5005	Malt 2-Row Bulk	RM: Malt	None	9,943,196.00	No
2	RM5006	Malt 2-Row bag	RM: Malt	None	100,370.00	No
3	RM5007	Malt Amber	RM: Malt	None	52,450.00	No
4	RM5008	Malt Best Chit	RM: Malt	None	1,501.00	No
5	RM5009	Malt Best Heidelberg	RM: Malt	None	3,900.00	No
6	RM5010	Malt Best Kara Pils	RM: Malt	None	1,500.00	No
7	RM5011	Malt Best Spelt	RM: Malt	None	5,700.00	No
8	RM5012	Malt Biscuit	RM: Malt	None	1,301.00	No
9	RM5013	Malt Black	RM: Malt	None	1,106.66	No
10	RM5014	Malt C-120	RM: Malt	None	585.00	No

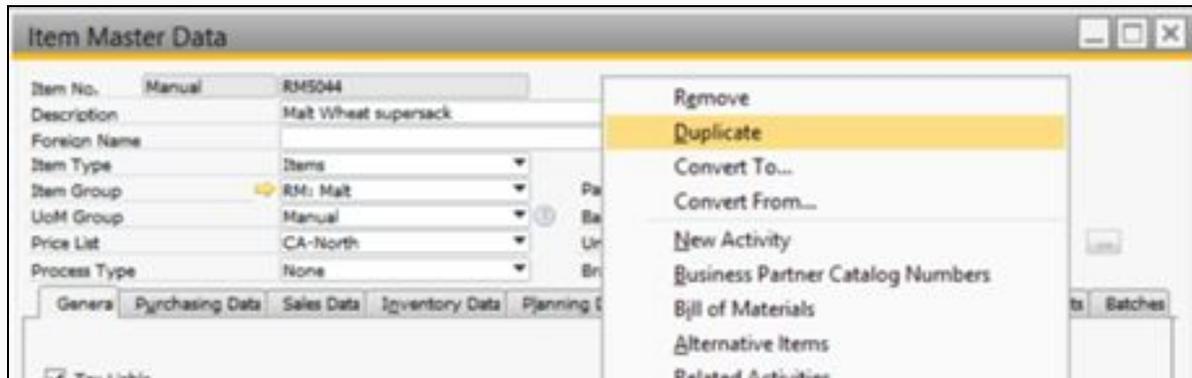
If it's not already sorted by "Item No." (first column in this screenshot) then double click that column heading to sort. We are looking to confirm the last RM item in your database. You can either scroll down on the page once you're sorted alphabetically by Item No. or you can double click the column heading again to reverse the order so that the last item is at the top of the list:

#	Item No.	Item Description	Item Gr...	Proc...
41	RMY7001	Yeast	RM: Other	Ferm...
40	RM5044	Malt Wheat supersack	RM: Malt	None
39	RM5043	Malt Vienna	RM: Malt	None
38	RM5042	Malt Victory	RM: Malt	None
37	RM5041	Malt Torrifed Wheat	RM: Malt	None
36	RM5040	Malt Special Roast	RM: Malt	None
35	RM5039	Malt Special B	RM: Malt	None
34	RM5038	Malt Roast	RM: Malt	None
33	RM5037	Malt Pale Beer Brewery Pils	RM: Malt	None

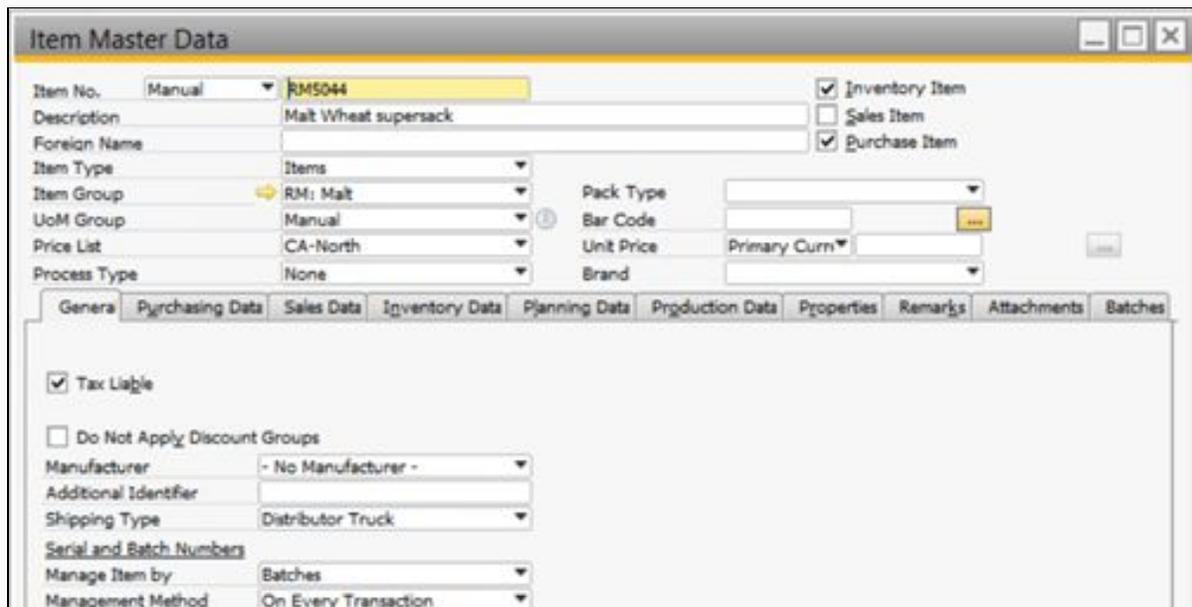
We're going to ignore the RMY item in this case since it's referring to yeast, and instead we confirm that the next RM item to be created is RM5045 since RM5044 is the last RM item on this list.



Double click (or highlight and select “OK”) the RM5044 item to open it. Then right click in a gray area (area without text/fields) and select “Duplicate”:



When doing so you'll notice that nothing appears to change:



The Item Co. field is editable, however, which is our confirmation (along with the “Add” option at the bottom of this window) that we’re ready to edit this data and save it as a new malt.

Update the Item No. and Description fields first with RM5045 along with a description for the new malt:



Item Master Data	
Item No.	Manual ▼ RM5045
Description	Malt - New Malt
Foreign Name	
Item Type	Items ▼
Item Group	RM: Malt ▼
UoM Group	Manual ▼
Price List	CA Malt ▼

The remainder of the data should be correct with the inventory and purchase item boxes toggled, the correct Item Group and correct warehouses (as copied from RM5045). You will want to spot check all of these options, though, to ensure nothing else needs to be changed. If this malt is supposed to have access to more or fewer warehouses, for example, update that on the Inventory Data tab.