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RECTRAC 3.1 CREATING A NEW INVENTORY ITEM

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RecTrac 3.1 Creating a New Inventory Item

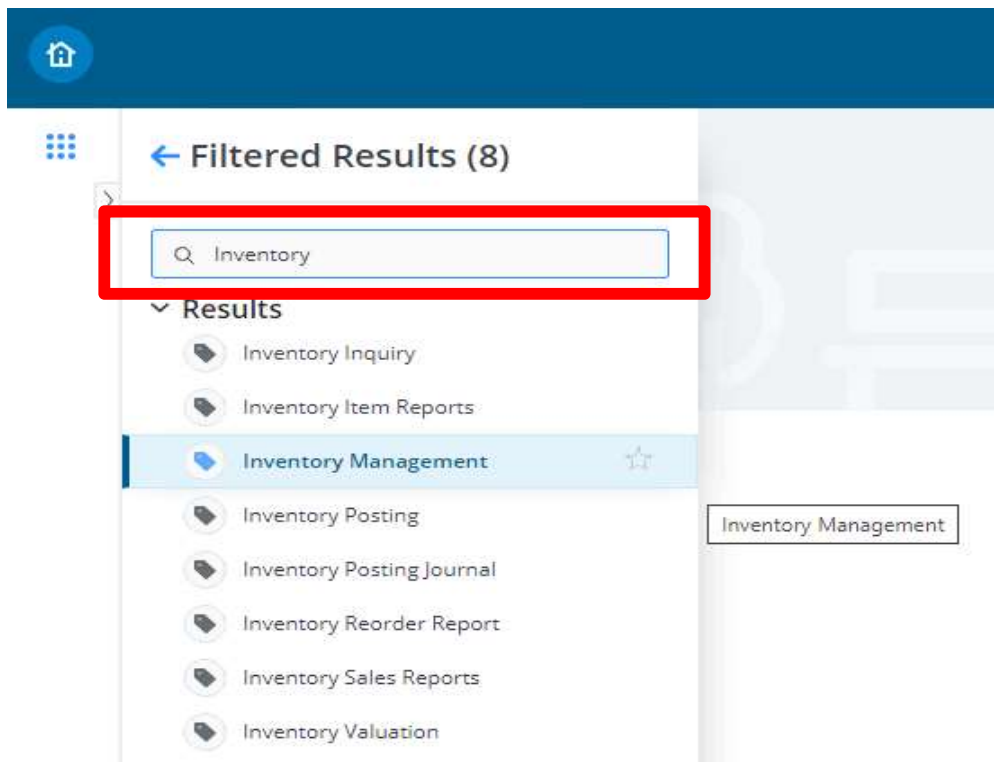


Inventory Management

Step 1: Click the 9 dot menu button in the top left corner.



Step 2 : Type Inventory Management in the search box and click on it.



RecTrac 3.1 Creating a New Inventory Item



Inventory Management

Step 3: Click Add Inventory Item at the bottom of the screen.

	SE7109-00-004-022	Fathers Day Kids	FnB Food	FnB - E
	SE7109-00-004-023	Cornbread Dessing	FnB Food	FnB - E
	SE7109-00-004-024	Professionals Day	FnB Food	FnB - E
	SE7109-00-004-025	Mongolian BBQ	FnB Food	FnB - E
	SE7109-00-004-026	Thanksgiving Adult	FnB Food	FnB - E

Add Inventory Item Add Recipe Item Change Delete Clone Bulk Create

Step 4:

- You will be prompted for a default item.
- Select the default item that matches what you're adding.
- Click Continue.

Default Record Add i ? x

Use this record as the default for this add

Default CNIC Breakfast Eggs

Cancel Continue

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Editing a Newly Created Inventory Item

NOTE: Choosing a Default Item will fill in a lot of the information needed in the new inventory item. The inventory department, type, subtype, SAP trigger, and other info will all fill in automatically. If you choose the wrong default item, it is easiest to click cancel at this screen and repeat the process rather than trying to edit the screen.



Below are required fields that need to be configured

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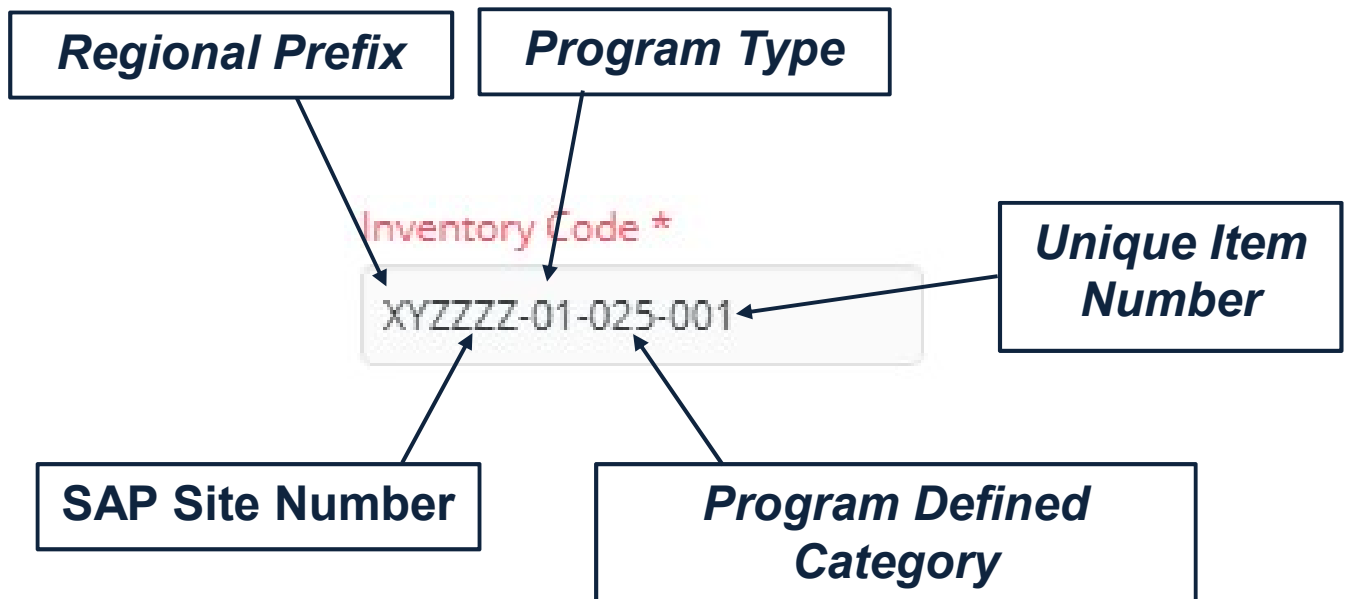


Inventory Code

Inventory Code * XYZZZZ-01-025-001	Status Active	Permissions * (1) SE Mid South Hel...
Short Description * Draft Beer	Department * FnB Beer	Dupe Printer Codes
Long Description Draft Beer	Type * FnB - Beer Domestic	<input type="checkbox"/> Recipe Item?
Label Description 	Subtype Draft	<input type="checkbox"/> Has A Recipe
<input checked="" type="checkbox"/> Include In Demographics	Report Tag 	

Step 4:

- Type in the Inventory Code based on the Navy 3.1 Item Coding Scheme Spreadsheet that will be distributed.
- Code should be 17 characters long



RecTrac 3.1 Creating a New Inventory Item



Permissions Code & Descriptions

Short Description

Permissions Code

Core Settings

Inventory Code * XYZZZZ-01-025-001	Status Active	Permissions * (1) SE Mid South Hel...
Short Description * Draft Beer	Department * FnB Beer	Dupe Printer Codes
Long Description Draft Beer	Type * FnB - Beer Domestic	<input type="checkbox"/> Recipe Item?
Label Description	Subtype Draft	<input type="checkbox"/> Has A Recipe
<input checked="" type="checkbox"/> Include In Demographics	Report Tag	

Long Description

Step 5:

- Select the Permissions Code that corresponds to your facility.
- There is typically only one option.

Step 6:

- Fill in the Short and Long Descriptions.
- Capitalize the first letter of each word.
- The Short Description prints on the receipt.

Optional:

- If this is an item that needs to be printed on a kitchen chit, you will need to select which kitchen printer it should print to. This is the 'Dupe Printer Codes' field.

RecTrac 3.1 Creating a New Inventory Item



Fees

POS Inventory Item Update

Core Recipe Fees Rules Questions Comments UPC Codes

POS Inventory Item Update

Core Settings


Inventory Code * Status Permissions *

Step 7: Click the Fees tab at the top. This will bring you to the fees screen.

Core Recipe **Fees** Rules Questions Comments UPC Codes

POS Inventory Item Update

Options Templates (0) Refresh Fees


Linked To	Linked Description	Description	Qty	Amount	Req	Fee Type
 Inventory Item		Default Beer Draft Domestic	1.00	\$ 0.00	<input checked="" type="checkbox"/>	Standard Fee

Step 8: Click the Stylus icon on the left side of the fee line.

Core Recipe **Fees** Rules Questions Comments UPC Codes

POS Inventory Item Update

Options Templates (0) Refresh Fees

Linked To	Linked Description	Description	Qty	Amount	Req	Fee Type
 Inventory Item		Default Beer Draft Domestic	1.00	\$ 0.00	<input checked="" type="checkbox"/>	Standard Fee

RecTrac 3.1 Creating a New Inventory Item



Fee cont.

POS Inventory Item Update

Options Templates (0) Refresh Fees 1 to 1 of 1

Linked To	Linked Description	Description	Qty	Amount	Req	Fee Type	Tran Type
Inventory It...		Default Beer Draft Domestic	1.0	\$ 0.00		Standard Fee	(1) Purchase

Step 9

- Update the Fee.
- This is the price the customer will pay per item sold.
- Check with CNIC for any special pricing scenarios.

Step 10

- Click Save at the bottom of the screen

RecTrac 3.1 Creating a New Inventory Item



Cloning

Cloning is a powerful tool to make data building a little quicker. With great power comes great responsibility. When cloning an item please follow these guidelines closely otherwise you'll make more work for yourself than creating one item at a time.

POS Inventory Management

Options Templates (1) Refresh POS Inventory

Inventory Code	Short Description	Long Description	Department	Type	Subtype	Status	Qty On Hand
ND7547-01-022-002	Bacardi	Bacardi	FnB Liquor	FnB - Call	None	Active	0.00
ND7547-01-025-001	Domestic Draft	Domestic Draft	FnB Beer	FnB - Beer Dom...	Draft	Active	0.00
ND7547-01-025-002	Domestic Pitcher	Domestic Pitcher	FnB Beer	FnB - Beer Dom...	Draft	Active	0.00
ND7547-01-027-001	Corona Bottle	Corona Bottle	FnB Beer	FnB - Beer Import	Package	Active	0.00
ND7547-01-027-002	Heineken Bottle	Heineken Bottle	FnB Beer	FnB - Beer Import	Package	Active	0.00
ND7547-01-027-003	Stella Bottle	Stella Bottle	FnB Beer	FnB - Beer Import	Package	Active	0.00
ND7547-01-028-001	Angry Orchard Bottle	Angry Orchard Bottle	FnB Beer	FnB - Beer Dom...	Package	Active	0.00
ND7547-01-028-002	Blue Moon Bottle	Blue Moon Bottle	FnB Beer	FnB - Beer Dom...	Package	Active	0.00
ND7547-01-028-003	Budweiser Bottle	Budweiser Bottle	FnB Beer	FnB - Beer Dom...	Package	Active	0.00
ND7547-01-028-004	Bud Light Bottle	Bud Light Bottle	FnB Beer	FnB - Beer Dom...	Package	Active	0.00

Bacardi	16387	301000	Liquor	\$4.5	Call
Canadian	16387	301000	Liquor	\$4.5	Call
Captain M	16387	301000	Liquor	\$4.5	Call
Cutty Sark	16387	301000	Liquor	\$4.5	Call
E & J	16387	301000	Liquor	\$4.5	Call
Jack Dani	16387	301000	Liquor	\$4.5	Call
Jameson	16387	301000	Liquor	\$4.7	Call
Jim Bean	16387	301000	Liquor	\$4.5	Call
Johnny W	16387	301000	Liquor	\$4.7	Call
Johnny W	16387	301000	Liquor	\$4.5	Call
Luksusowa	16387	301000	Liquor	\$4.5	Call
Myers	16387	301000	Liquor	\$4.5	Call
Parrot Bay	16387	301000	Liquor	\$4.5	Call
Apple Puc	16387	301000	Liquor	\$4.5	Cord
B & B	16387	301000	Liquor	\$4.7	Cord
Blue Cara	16387	301000	Liquor	\$4.5	Cord
Chambord	16387	301000	Liquor	\$4.7	Cord
Coffee Liq	16387	301000	Liquor	\$4.5	Cord
Disaronna	16387	301000	Liquor	\$6.5	Cord
Grand Mar	16387	301000	Liquor	\$6.5	Cord
Hot Damn	16387	301000	Liquor	\$4.5	Cord
Kahlua	16387	301000	Liquor	\$4.7	Cord
McGillicu	16387	301000	Liquor	\$4.5	Cord
Peach Scf	16387	301000	Liquor	\$4.5	Cord
Absolut	16387	301000	Liquor	\$4.7	Prem
Amaretto	16387	301000	Liquor	\$4.5	Prem
Bombay S	16387	301000	Liquor	\$4.7	Prem
Chivas	16387	301000	Liquor	\$4.7	Prem

Using the steps in pages 2 – 8 of this document, the Bacardi inventory item was created. Now the rest of the items need to be created. In Excel, I have a list of all inventory that needs to be created. I categorized all the liquor based on the Navy data standards.

RecTrac 3.1 Creating a New Inventory Item



Cloning continued

In the spreadsheet on the previous page, my first item Bacardi was already created.

There are 12 additional items that need to be created that all have the same type/subtype/department/SAP trigger.

This allows me to use the clone tool.

Step 1: Select the item you are cloning and click Clone at the bottom of the screen.

The screenshot shows the 'POS Inventory Management' interface. At the top, there are tabs for 'Options', 'Templates', and a '(1)' indicator, along with a 'Refresh' button. Below this is a table with columns: 'Inventory Code', 'Short Description', 'Long Description', and 'Departm'. The first row of the table is highlighted in blue and has a red border around it. The data in this row is: 'ND7547-01-022-002', 'Bacardi', 'Bacardi', and 'FnB Li'. At the bottom of the interface, there are five buttons: 'Add Inventory Item', 'Add Recipe Item', 'Change', 'Delete', and 'Clone'. The 'Clone' button is highlighted with a red border.

Be **VERY** careful when using the clone tool. You cannot clone an item that doesn't have matching types/subtype/department/SAP trigger.

They **ALL** must match. For example:

- I can't clone French Fries to create Cheeseburgers.
- I could clone French Fries to create Potato Wedges, Onion Rings, and Sweet Potato Fries.

RecTrac 3.1 Creating a New Inventory Item



Cloning Continued

File Maintenance Clone i ? x

Clone Settings

New Record Code List * ⓘ ND7547-01-022-0**

Sequence Type ⓘ Numeric

Min Sequence Number ⓘ 0

Max Sequence Number ⓘ 999

ⓘ Use the record code list to create new primary codes for this item, to create a sequence any code in the list can contain asterisks (*) which will prompt for a sequence. Example: Test** will create Test00 => Test99 or Testaa => Testzz.

Step 2

- In the New Record Code List field, you will type in the item number with either one or two asterisks on the end.
- The asterisk are wildcard fields.
- If you are creating more than 9 items, you'll need two asterisks. Less than 9, you only need one. Total Characters should be 17 including the asterisks.
- ND7547-01-022-0** OR ND7547-01-022-00*

New Record Code List * ⓘ ND7547-01-022-0**

Sequence Type ⓘ Numeric

Min Sequence Number ⓘ 3

Max Sequence Number ⓘ 14

Step 3

- Fill in the Min and Max Sequence Number fields.
- This is the number range that will replace the asterisks at the end of the inventory item number.
- In the above example, ND7547-01-022-003, ND7547-01-022-004, through ND7547-01-022-014 will be created.

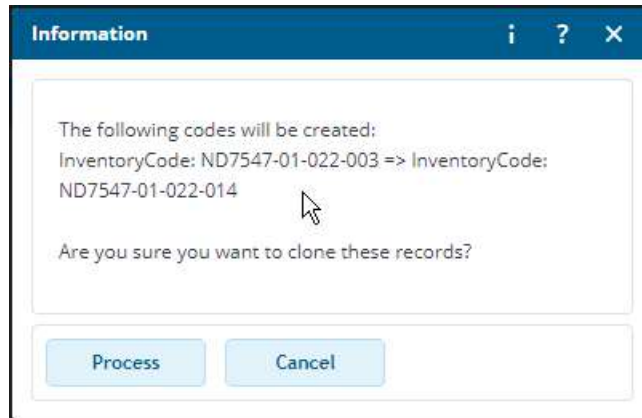
RecTrac 3.1 Creating a New Inventory Item



Cloning continued

Step 4

- Click Continue.



Step 5

- Read the next screen and verify that the pending results is what you're looking for.
- Click Process.

🔗 ND7547-01-022-002	Bacardi	Bacardi	FnB Liquor
🔗 ND7547-01-022-003	Bacardi	Bacardi	FnB Liquor
🔗 ND7547-01-022-004	Bacardi	Bacardi	FnB Liquor
🔗 ND7547-01-022-005	Bacardi	Bacardi	FnB Liquor
🔗 ND7547-01-022-006	Bacardi	Bacardi	FnB Liquor
🔗 ND7547-01-022-007	Bacardi	Bacardi	FnB Liquor
🔗 ND7547-01-022-008	Bacardi	Bacardi	FnB Liquor
🔗 ND7547-01-022-009	Bacardi	Bacardi	FnB Liquor
🔗 ND7547-01-022-010	Bacardi	Bacardi	FnB Liquor
🔗 ND7547-01-022-011	Bacardi	Bacardi	FnB Liquor
🔗 ND7547-01-022-012	Bacardi	Bacardi	FnB Liquor
🔗 ND7547-01-022-013	Bacardi	Bacardi	FnB Liquor
🔗 ND7547-01-022-014	Bacardi	Bacardi	FnB Liquor

Step 6

- Update the resulting cloned items.
- You will need to change the description and the price.
- You can update the description using the stylus button.
- You will need to edit the item to update the fee.