

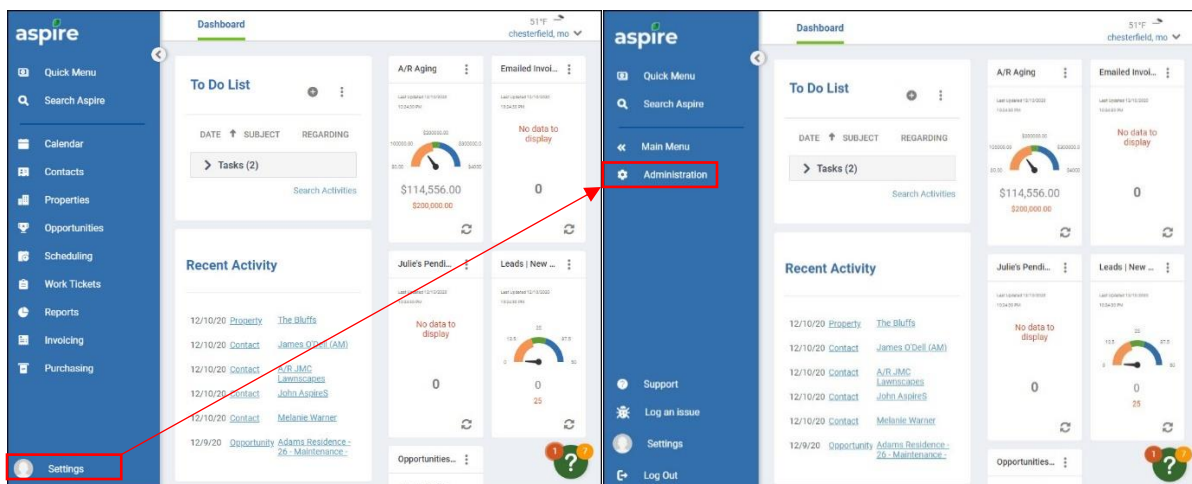
## Adding Items to the Catalog

**Purpose:** A catalog item is a specific labor, material, equipment, subcontractor, other item that is required to perform a service and have a cost associated with them.

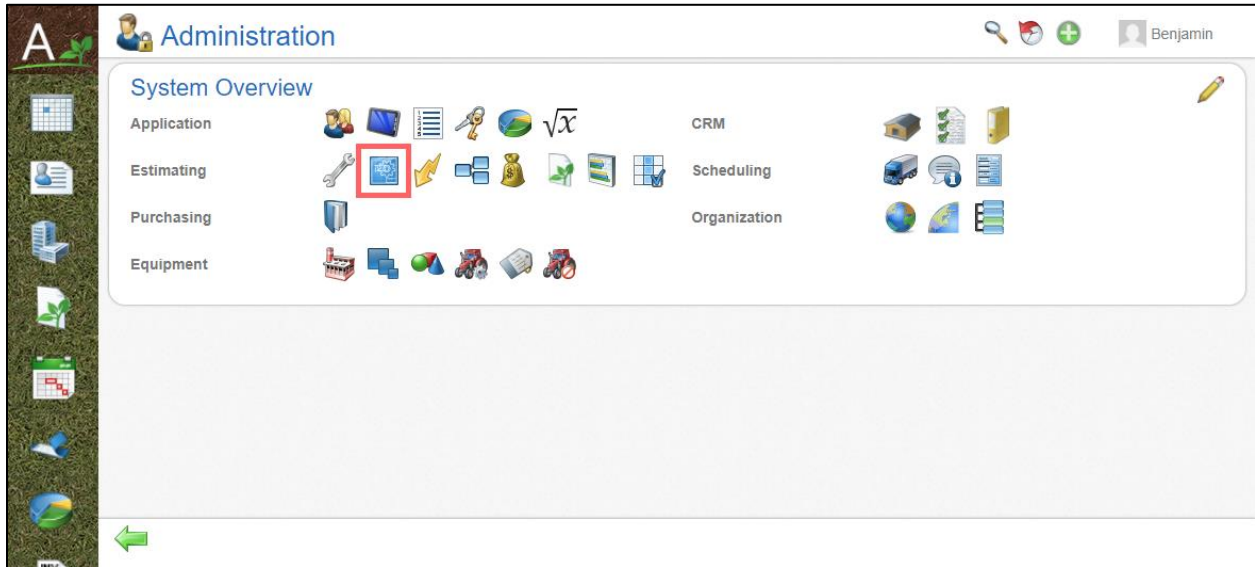
### Prerequisites:

1. System Admin Role or Branch Admin Role Setting
2. and Enhanced branch securities checked in the company configuration  
**User name->Administration->Pencil->Company Tab->Check Enhance Branch Admin Security**

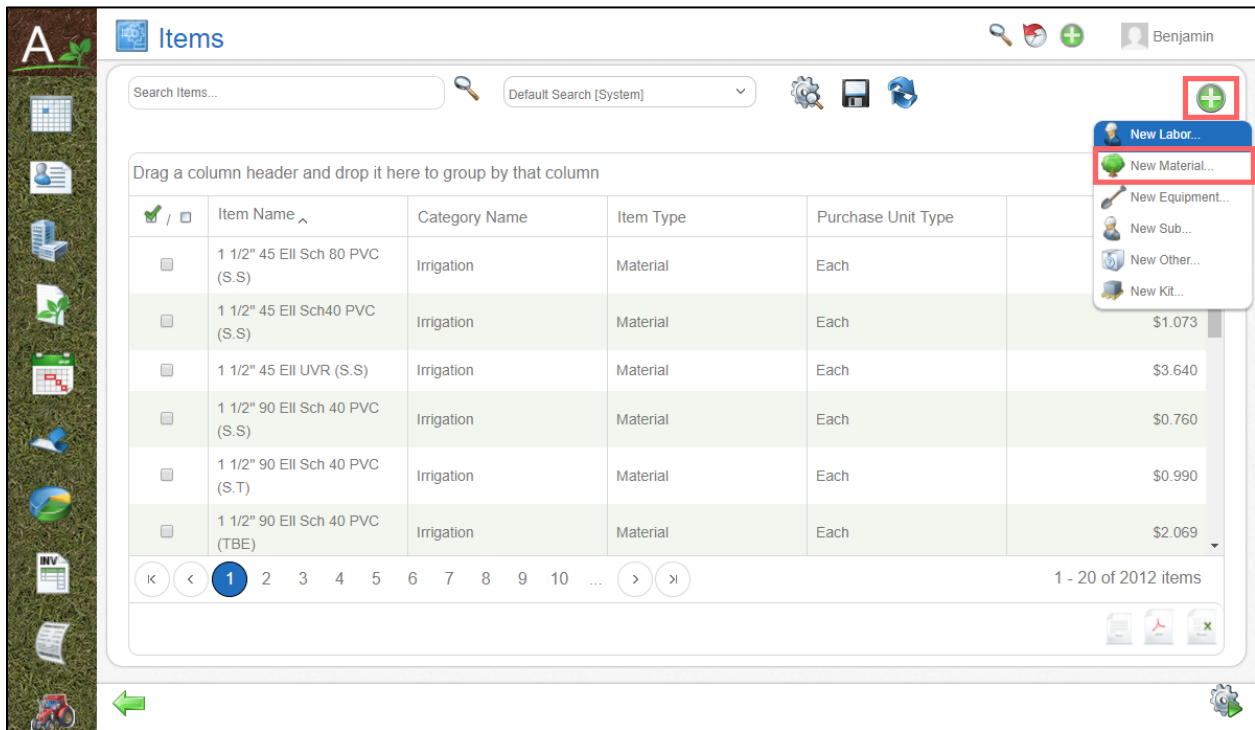
**Procedures:** To add items to the catalog, follow these steps:



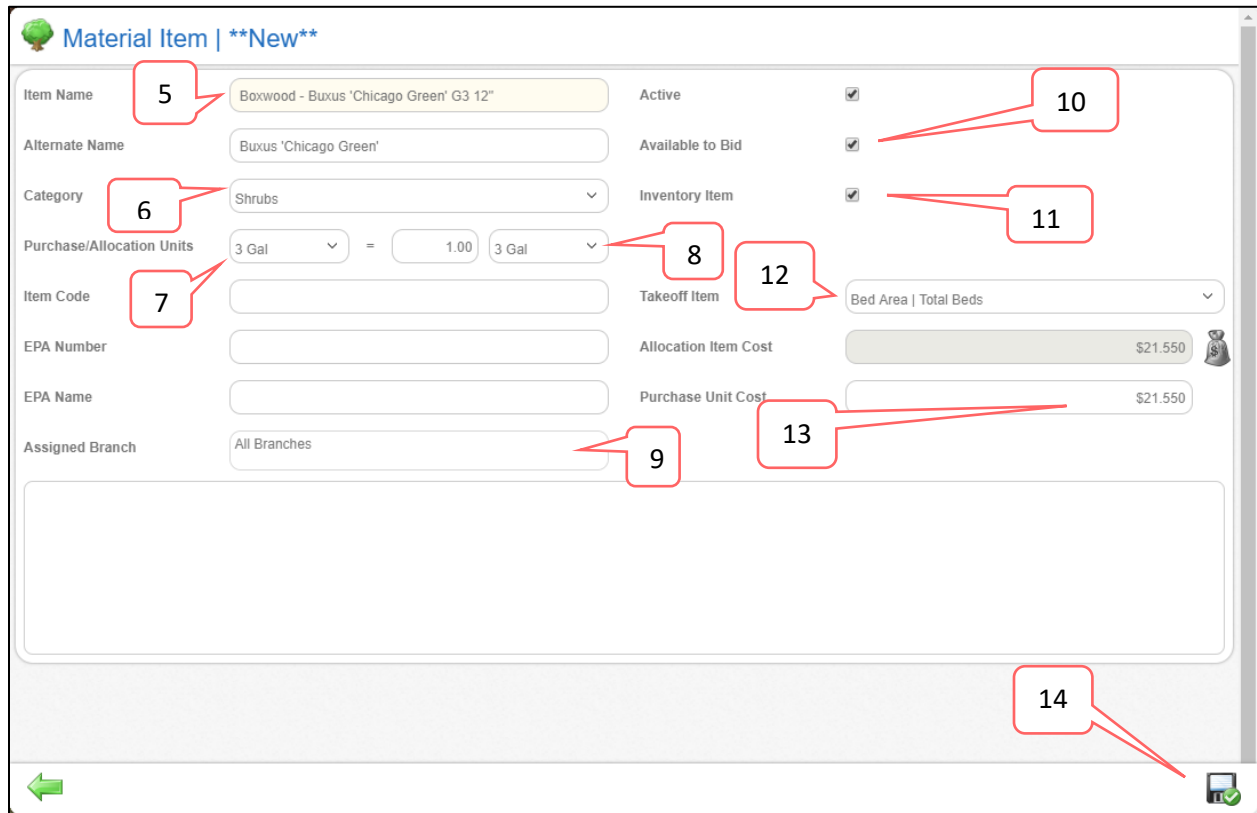
1. Click on Settings on the main menu.
2. Click on Administration



3. Click on the Blue Design icon.



4. Hover over the green plus and select the new type of item.



5. Type in the Item Name. The Alternate Name will copy.  
*Note: The alternative name can be a specific name on genus and species.*
6. Select an Item Category.
7. Select the purchase unit's measurement in how the item is ordered.
8. Select the allocation unit's measurement in how the item will be allocated to jobs. (if the allocation unit measure is different than the Purchase unit you will need to fill out the conversion factor in the field to the right of the Allocation units). *See chart below for examples.*

Item Name	Purchase Unit	Conversion	Allocation Unit
Fertilizer	Bag	50	Lbs.
Misc. Irrigation Parts	Dollar	1	Dollar
Sub	Dollar	1	Dollar
Roundup	2.5 Gallon Jug	320	Ounce
Maintenance Labor	Hour	1	Hour
Stump Grinder	Day	8	Hour

9. Assign the branch for where the item will be available. Leave blank if available to all branches.
10. Select the checkbox if the item can be used in estimates.
11. Select the checkbox if the item will be available in inventory.
12. If desired, select the Takeoff Item from where the calculation on the estimate should happen.
13. Enter in how much the unit cost from the Vendor in the Purchase Unit Cost field.  
*Note: The Allocation Item Cost will update once the item has been saved.*
14. Save the Item.