

PROFITEDGE CHECKLIST · FOUNDATIONS

New Item Setup Checklist

A new item is set up once, usually in a hurry, and every price, reorder and report that touches it inherits whatever went in that first time. Keep this where new items are set up.

Item setup owner

Reviews new items

How often

Last updated

1 For every new item

STEP	DONE
Use the vendor's part number and description exactly, so invoices and returns match	☐
Enter the real landed cost, including freight where the system allows it	☐
Put it in the right department and category, the same way every time	☐
Let the pricing rule set the price, unless there's a written reason not to	☐
Set the unit of measure and pack size, and check them against the invoice	☐
Set reorder settings, or decide on purpose that it's a one-time special order	☐
Link supersessions and replacements to the old part number	☐
Record a bin location before the item goes on the shelf	☐

2 Our house rules

The checklist only works if everyone follows the same rules. Write yours down.

RULE	WHAT WE DO
How departments and categories are split	
Which pricing rule applies to which kind of item	
When a manual price is allowed, and who approves it	
Who can create a new item	

