

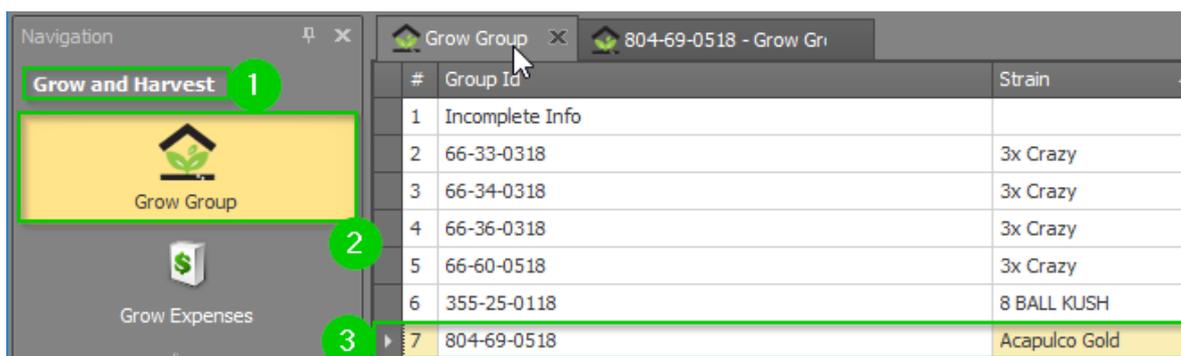
Create an Expense Template

Last Modified on 08/05/2019 12:46 pm MST

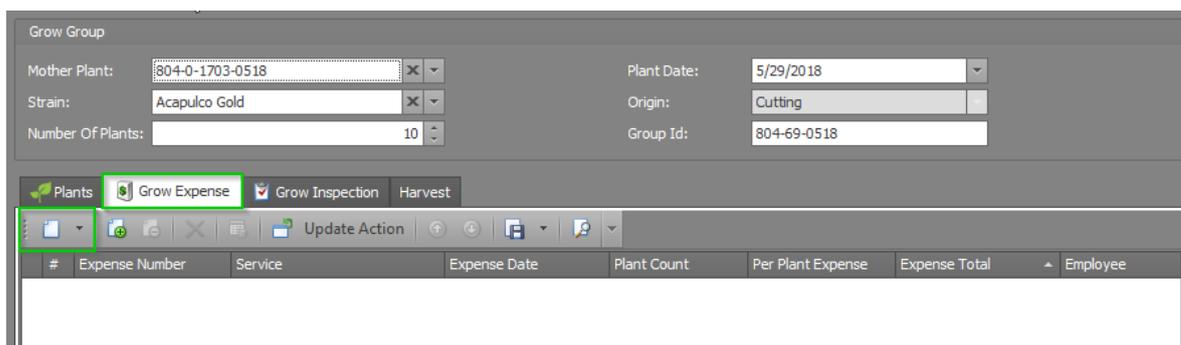
Recording a new Expense from scratch can be time-consuming, and it gets old adding each of those individual products one-by-one. The good news is, there's a better way! You can create an Expense Template ahead of time for the activities you do all the time, like a particular feeding schedule. This means that when you choose the template, it pre-populates the individual products used all at once.

To create a new Expense Template, follow the steps below:

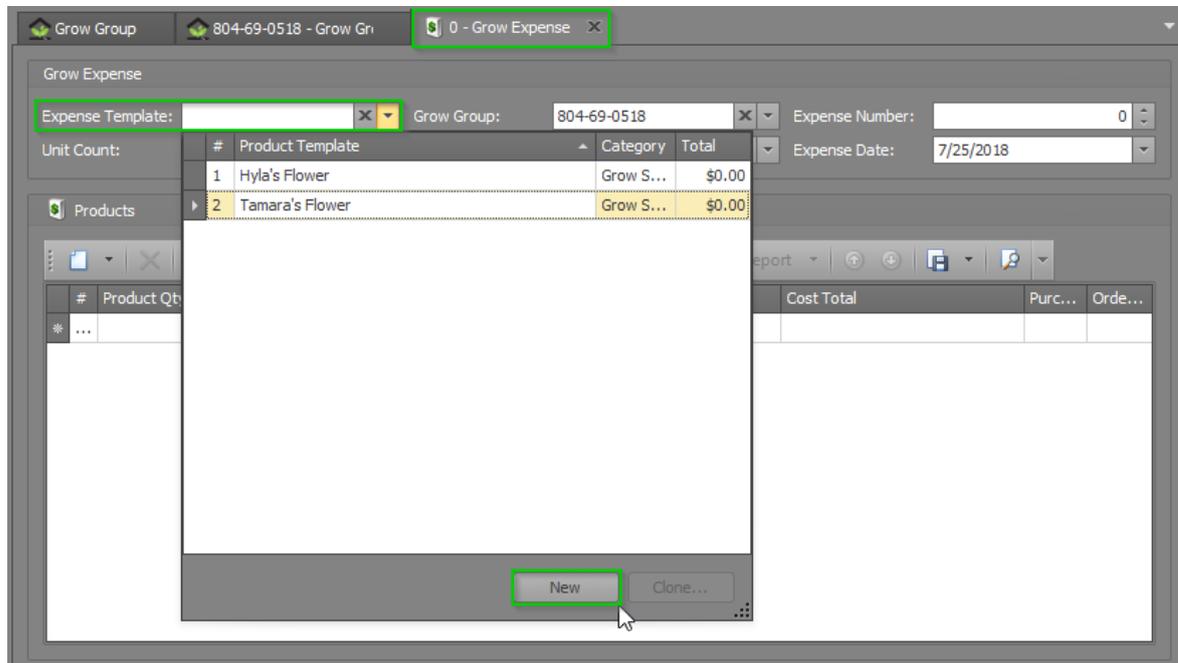
- Step 1 - Under the **Grow and Harvest** module, select the **Grow Batch** section and then select the desired Grow Batch on which you'll be incurring Expenses through using raw materials and nutrients.



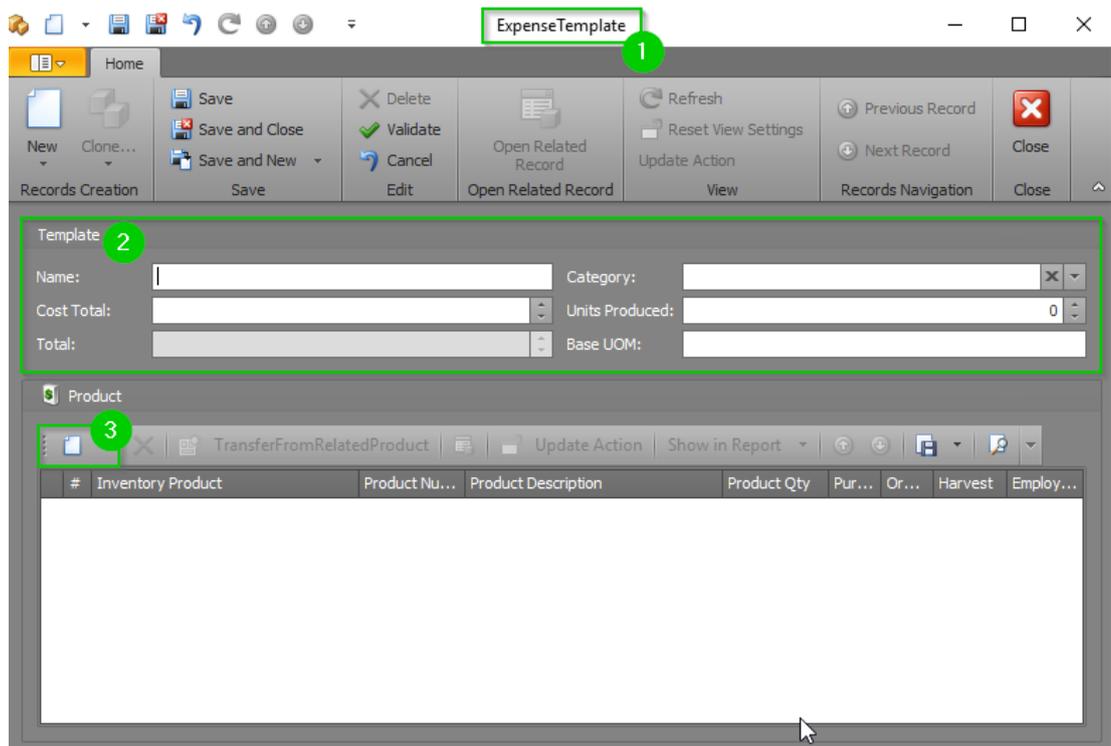
- Step 2 - In the Grow Batch detail view, under the **Grow Expenses** sub-tab, click the **New** button to add a new Expense. This will open a new Grow Expense detail view tab.



- Step 3 - In the Grow Expense detail view, select the Expense Template dropdown and click the **New** button at the bottom of the pop-up screen.

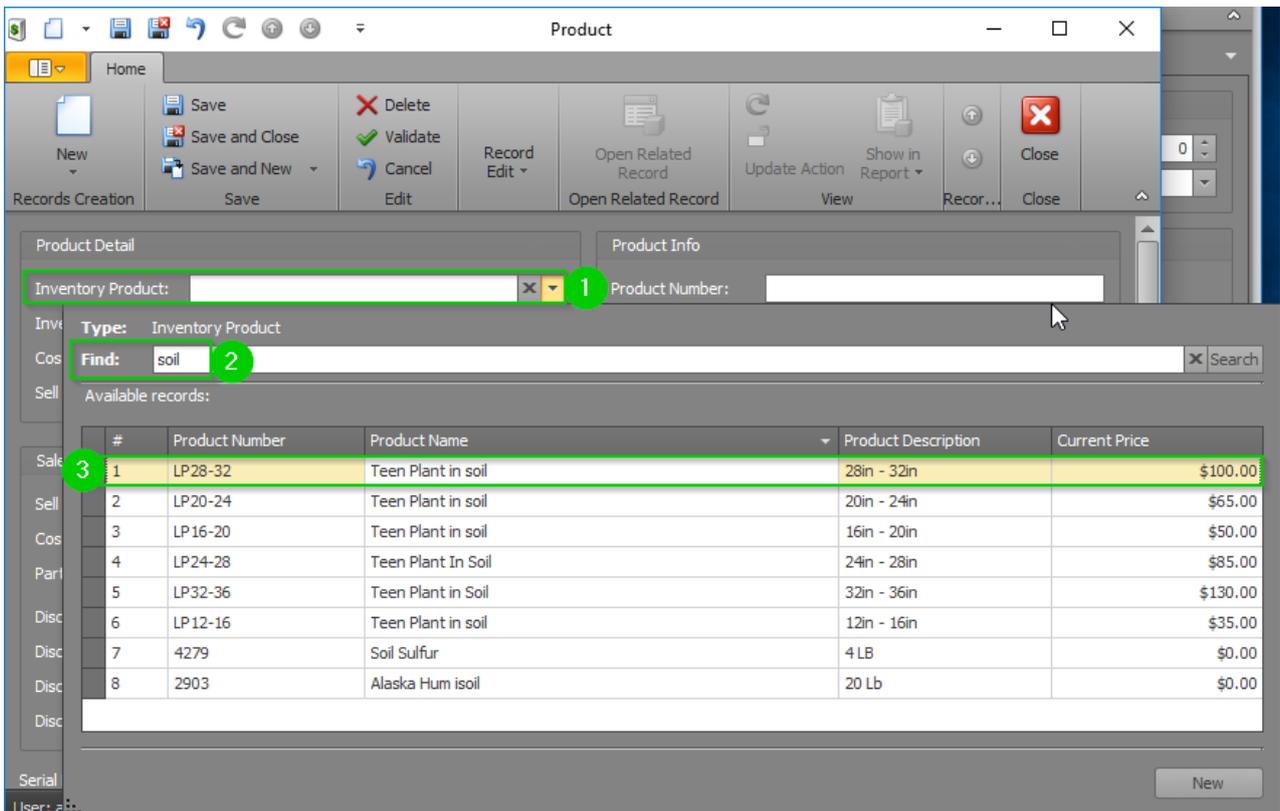


- Step 4 - In the new template pop-up window, fill in the following fields and then click the **New** icon within the pop-up's **Product** section to add your first product.
 - **Name** - Choose a memorable name for your template that others will recognize when they need to do that expense activity.
 - **Cost Total** - This field will auto-populate once you begin to add products.
 - **Category** - Choose from a list of pre-set categories that describe the type of products that are included in this Expense Template.
 - **Units Produced** - The number of end-products created as a result of using the template given the selected quantities of each product (You'll select your product quantities next).
 - **Base Unit Type** - The unit of measure for this particular Expense Template.

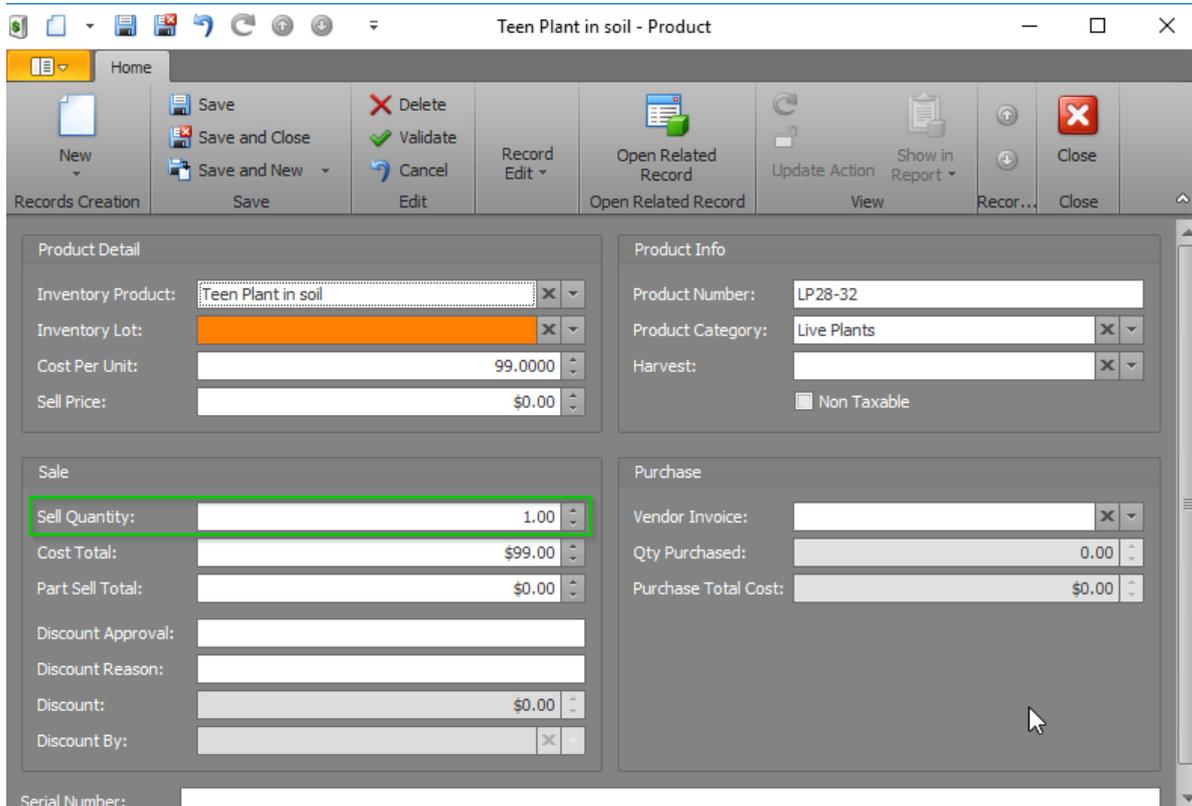


- Step 5 - A second pop-up window will appear to enter the details for the first product you want to add to this Expense Template. Fill in the **Inventory Product** field by searching for the desired product. The remaining fields in the pop-up will populate automatically.

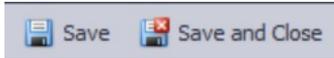
If cost was not entered for a product when it was created, KLĒR THC will be unable to accurately track this Expense. If you notice that the **Cost Per Unit** field says "\$0.00", contact an administrator to get the cost updated on that product.



- Step 6 - Adjust the Sell Quantity field to reflect the amount of product used in this Expense.



- Step 7 - Click the **Save and Close** button on the pop-up window.
- Step 8 - Repeat steps 4-7 for all remaining products.
- Step 9 - Verify that all your quantities are correct, and then click **Save** or **Save and Close** to finalize your Expense Template.



Now this Expense Template can be used in any Expense to speed things along!