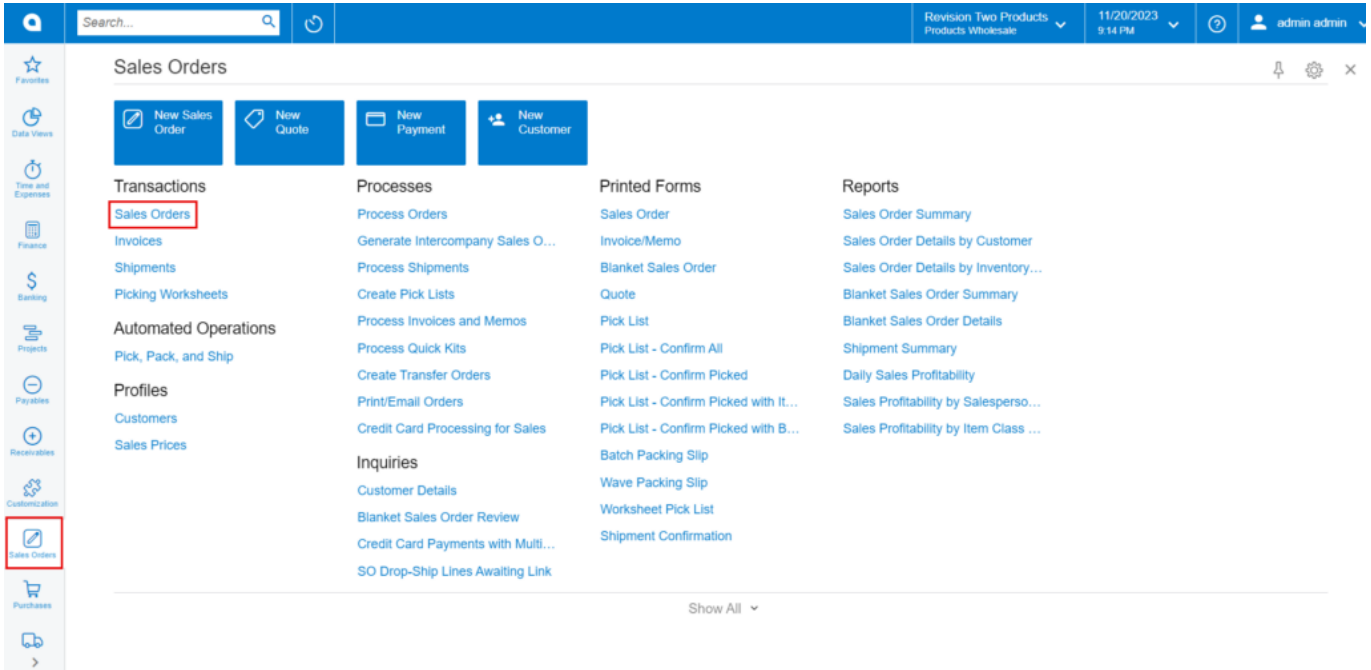


Sales Orders

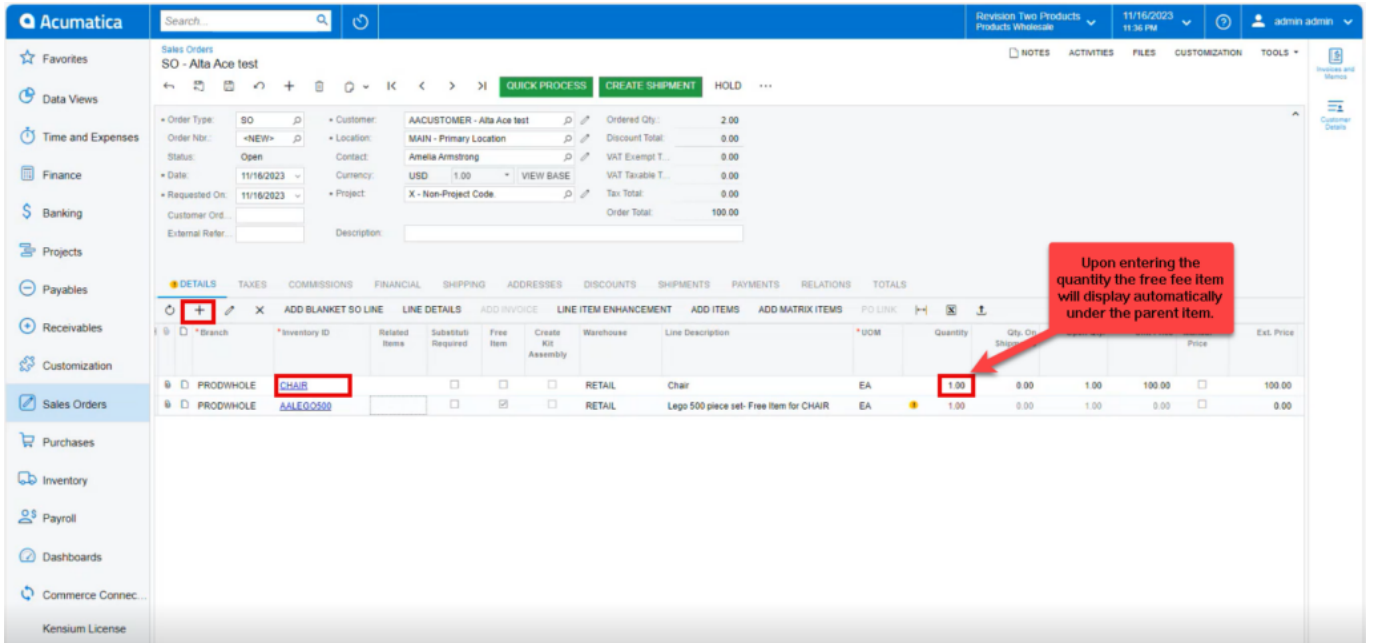
- ✘ You must navigate to the left panel of Acumatica and click on **[Sales Orders]** and then click on **[Sales Orders]** under **[Transactions]**.



The screenshot shows the Acumatica interface for Sales Orders. The top navigation bar includes a search field, a refresh icon, and user information: 'Revision Two Products Wholesale' and '11/20/2023 9:14 PM'. The left sidebar contains various navigation icons, with 'Sales Orders' highlighted in red. The main content area displays a grid of options: 'New Sales Order', 'New Quote', 'New Payment', and 'New Customer'. Below these are four columns: 'Transactions' (with 'Sales Orders' highlighted in red), 'Processes', 'Printed Forms', and 'Reports'.

Sales Orders

- Click on the **[+]** icon, then you will be redirected to the Sales Orders screen.
- You need to search for **[Customer]**.
- Click on **[+]** icon under **[Details]** and search for the created **[Inventory ID]**.
- Enter the **[Quantity]**.
- Upon entering the **[Quantity]** the free item will auto be populated on the screen.
- Click on **[Save]**.



Acumatica Sales Order: SO - Alta Ace test

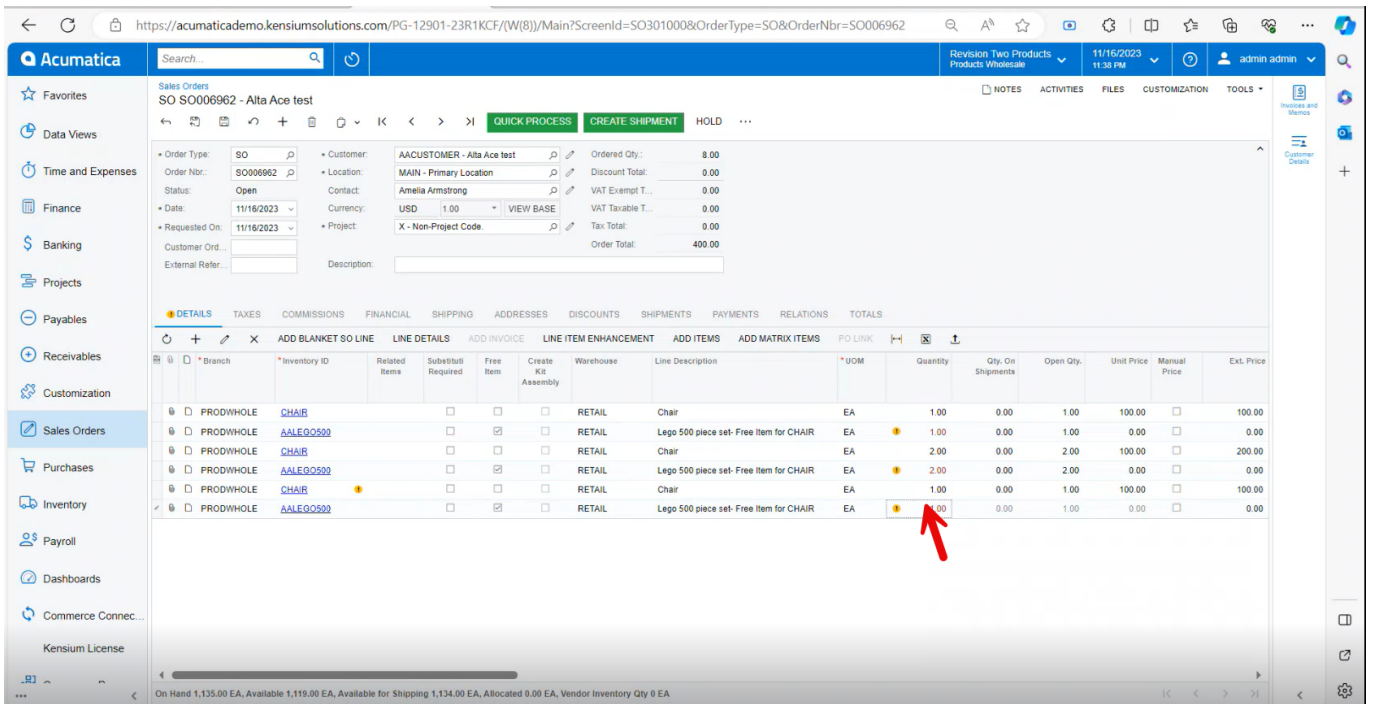
Order Type: SO, Order Nbr: -NEW+, Status: Open, Date: 11/16/2023, Requested On: 11/16/2023

Customer: AACUSTOMER - Alta Ace test, Location: MAIN - Primary Location, Contact: Amelia Armstrong, Currency: USD 1.00, Project: X - Non-Project Code

Order Total: 100.00

Branch	Inventory ID	Related Items	Substituted	Free Item	Create Kit Assembly	Warehouse	Line Description	UOM	Quantity	Qty. On Shipments	Open Qty.	Unit Price	Manual Price	Ext. Price
PRODWHOLE	CHAIR					RETAIL	Chair	EA	1.00	0.00	1.00	100.00		100.00
PRODWHOLE	ALEGO500					RETAIL	Lego 500 piece set- Free Item for CHAIR	EA	1.00	0.00	1.00	0.00		0.00

Sales Orders



Acumatica Sales Order: SO S0006962 - Alta Ace test

Order Type: SO, Order Nbr: S0006962, Status: Open, Date: 11/16/2023, Requested On: 11/16/2023

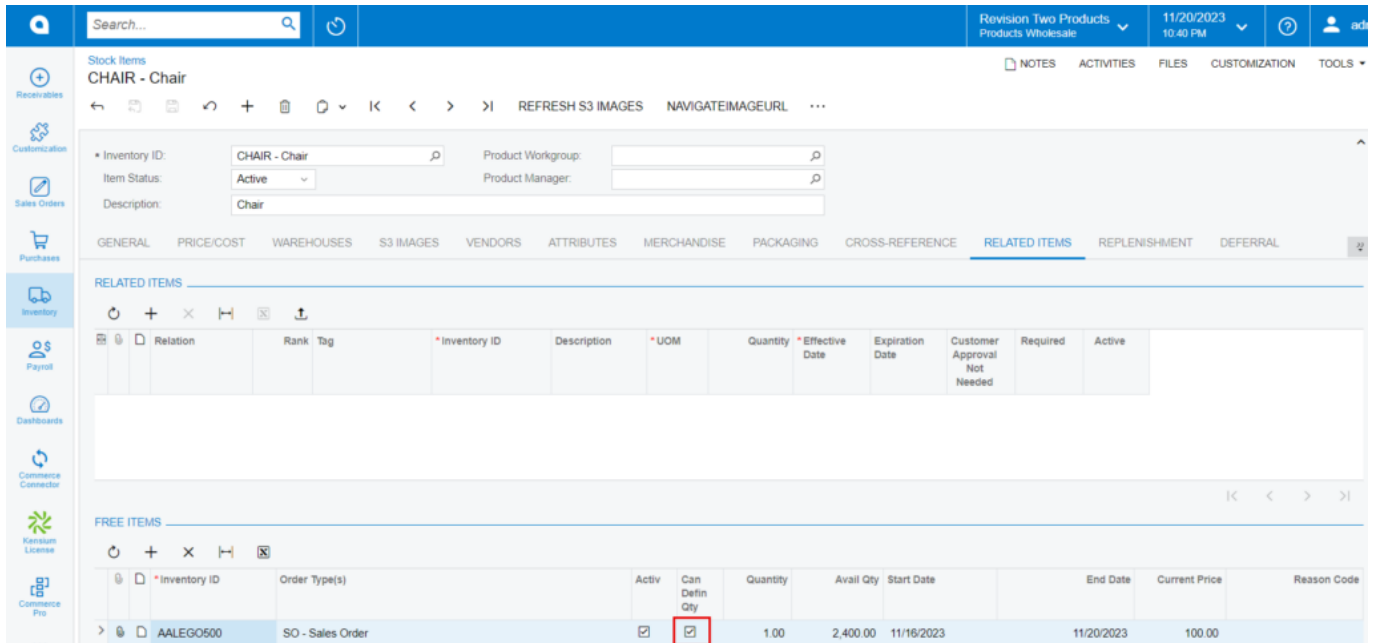
Customer: AACUSTOMER - Alta Ace test, Location: MAIN - Primary Location, Contact: Amelia Armstrong, Currency: USD 1.00, Project: X - Non-Project Code

Order Total: 400.00

Branch	Inventory ID	Related Items	Substituted	Free Item	Create Kit Assembly	Warehouse	Line Description	UOM	Quantity	Qty. On Shipments	Open Qty.	Unit Price	Manual Price	Ext. Price
PRODWHOLE	CHAIR					RETAIL	Chair	EA	1.00	0.00	1.00	100.00		100.00
PRODWHOLE	ALEGO500					RETAIL	Lego 500 piece set- Free Item for CHAIR	EA	1.00	0.00	1.00	0.00		0.00
PRODWHOLE	CHAIR					RETAIL	Chair	EA	2.00	0.00	2.00	100.00		200.00
PRODWHOLE	ALEGO500					RETAIL	Lego 500 piece set- Free Item for CHAIR	EA	2.00	0.00	2.00	0.00		0.00
PRODWHOLE	CHAIR					RETAIL	Chair	EA	1.00	0.00	1.00	100.00		100.00
PRODWHOLE	ALEGO500					RETAIL	Lego 500 piece set- Free Item for CHAIR	EA	1.00	0.00	1.00	0.00		0.00

Sales Orders

- You can see that free item Quantity is not editable but if the **[Can Define Qty]** is enabled under **[Free Items]**, you can edit the quantity in sales orders screen.

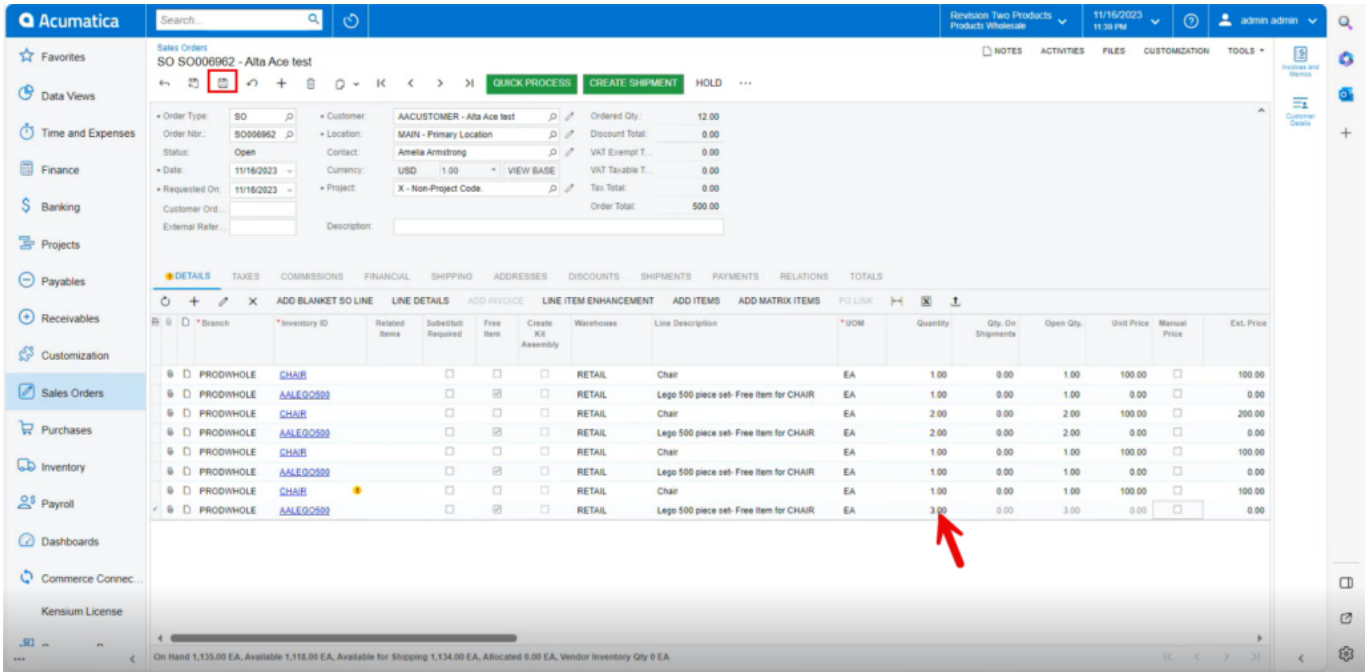


The screenshot shows the 'Stock Items' page for 'CHAIR - Chair'. The 'RELATED ITEMS' section is empty. The 'FREE ITEMS' section contains one item with the following details:

Inventory ID	Order Type(s)	Activ	Can Define Qty	Quantity	Avail Qty	Start Date	End Date	Current Price	Reason Code
AALEGO500	SO - Sales Order	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	1.00	2,400.00	11/16/2023	11/20/2023	100.00	

Stock Items Figure: Sales Orders

- Upon enabling the check box, you can edit the quantity for free item.



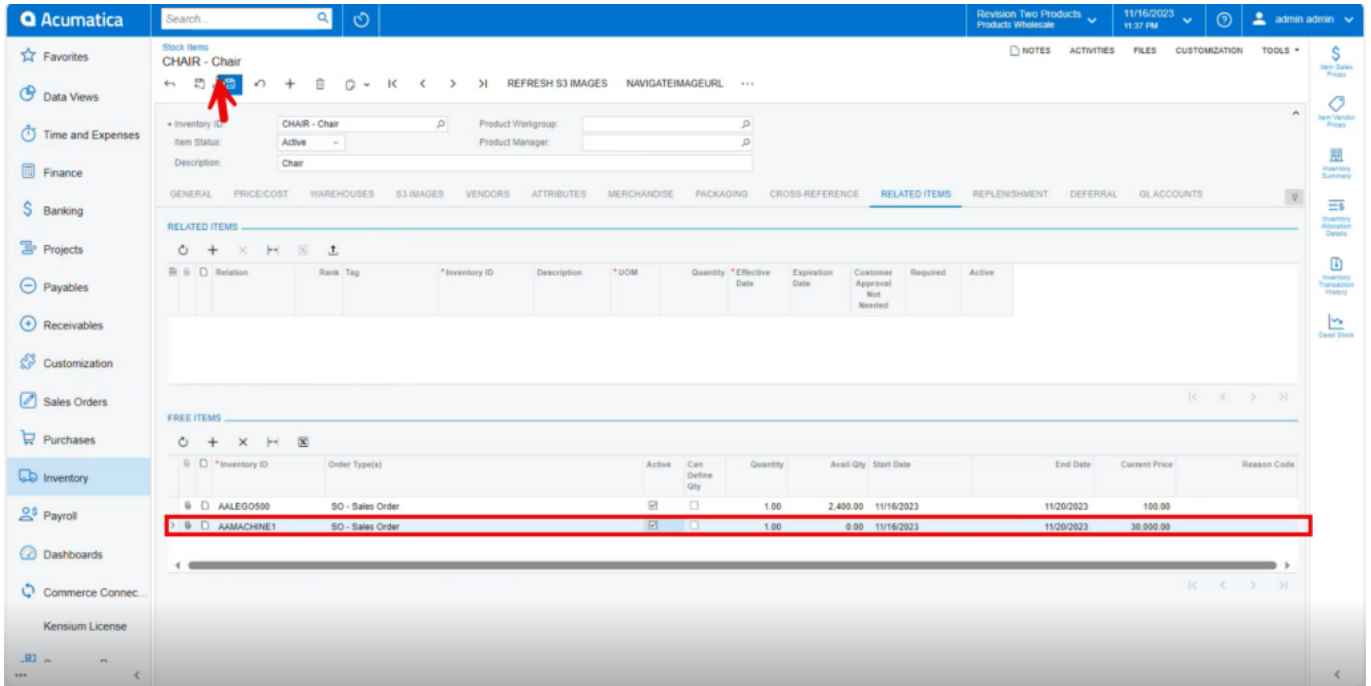
The screenshot shows the Acumatica Sales Order interface for order SO SO006962. The main table displays the following items:

Branch	Inventory ID	Related Items	Substitu Required	Free Item	Create Kit Assembly	Warehouse	Line Description	UOM	Quantity	Qty. On Shipments	Open Qty.	Unit Price	Manual Price	Ext. Price
PRODWHOLE	CHAIR		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	RETAIL	Chair	EA	1.00	0.00	1.00	100.00		100.00
PRODWHOLE	ALEGO200		<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	RETAIL	Lego 500 piece set- Free Item for CHAIR	EA	1.00	0.00	1.00	0.00		0.00
PRODWHOLE	CHAIR		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	RETAIL	Chair	EA	2.00	0.00	2.00	100.00		200.00
PRODWHOLE	ALEGO200		<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	RETAIL	Lego 500 piece set- Free Item for CHAIR	EA	2.00	0.00	2.00	0.00		0.00
PRODWHOLE	CHAIR		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	RETAIL	Chair	EA	1.00	0.00	1.00	100.00		100.00
PRODWHOLE	ALEGO200		<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	RETAIL	Lego 500 piece set- Free Item for CHAIR	EA	1.00	0.00	1.00	0.00		0.00
PRODWHOLE	CHAIR		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	RETAIL	Chair	EA	1.00	0.00	1.00	100.00		100.00
PRODWHOLE	ALEGO200		<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	RETAIL	Lego 500 piece set- Free Item for CHAIR	EA	3.00	0.00	3.00	0.00		0.00

A red arrow points to the quantity of 3.00 in the last row. The status bar at the bottom indicates: On Hand 1,135.00 EA, Available 1,113.00 EA, Available for Shipping 1,134.00 EA, Allocated 0.00 EA, Vendor Inventory Qty 9 EA.

Sales Orders

- You can also add multiple free items for specific stock items under **[Related Items]**.
- If you add multiple free items for stock items, alternate items will be replaced when the free item does not have quantity available in the warehouse.



Acumatica

Search...

Revision Two Products
Products Wholesale

11/16/2023
11:31 PM

admin admin

Stock Items
CHAIR - Chair

Inventory ID: CHAIR - Chair
Item Status: Active
Description: Chair

Product Workgroup:
Product Manager:

GENERAL PRICE/COST WAREHOUSES S3 IMAGES VENDORS ATTRIBUTES MERCHANDISE PACKAGING CROSS-REFERENCE RELATED ITEMS REFRESHMENT DEFERRAL GL ACCOUNTS

RELATED ITEMS

Relation	Rank	Tag	*Inventory ID	Description	*UOM	Quantity	*Effective Date	Expiration Date	Customer Approval Not Needed	Required	Active

FREE ITEMS

*Inventory ID	Order Type(s)	Active	Can Define Qty	Quantity	Avail Qty	Start Date	End Date	Current Price	Reason Code
AALEO0500	SO - Sales Order	<input checked="" type="checkbox"/>	<input type="checkbox"/>	1.00	2,400.00	11/16/2023	11/20/2023	100.00	
AAMACHINE1	SO - Sales Order	<input checked="" type="checkbox"/>	<input type="checkbox"/>	1.00	0.00	11/16/2023	11/20/2023	30,000.00	

Sales Orders

Note: The **[Active]** checkbox needs to be activated for the free item to display in the stock items screen.

- Free Item is added only if the stock items quantity is selected.
- Deleting the parent item will delete the free item automatically.
- Deleting the free item alone will delete only free item.