
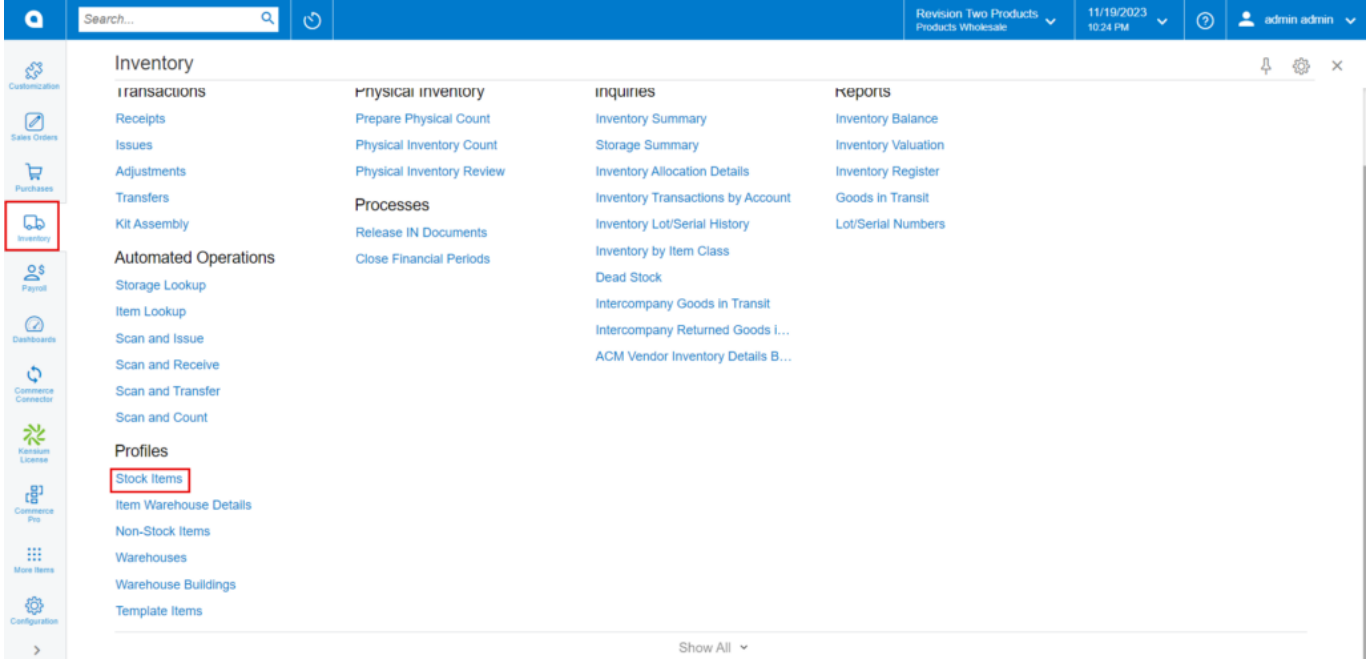


Syncing Free Stock Items in Stock Items

 You need to navigate to the left side panel of **[Acumatica]** and click on **[Inventory]** and then click on **[Stock Items]** under **[Profiles]**.



The screenshot shows the Acumatica user interface. The top navigation bar includes a search field, a refresh icon, and system information like 'Revision Two Products', 'Products Wholesale', and the date '11/19/2023 10:24 PM'. The left sidebar contains various application icons, with 'Inventory' highlighted in red. The main content area displays the 'Inventory' module menu, organized into sections: 'Transactions', 'Physical Inventory', 'Inquiries', 'Reports', 'Automated Operations', and 'Profiles'. The 'Stock Items' option under the 'Profiles' section is highlighted in red.

Stock Items

- Upon clicking you will be redirected to the Stock Items screen.
- Click on **[+]** icon.

Search...

Revision Two Products
Products Wholesale

11/19/2023
10:30 PM

admin admin

Stock Items

CUSTOMIZATION TOOLS

Inventory ID Description Type InventoryItem_Formula409f715596d445078a35c3c94f9f9836 Item Class Posting Class Tax Category Default Warehouse Bas Unit

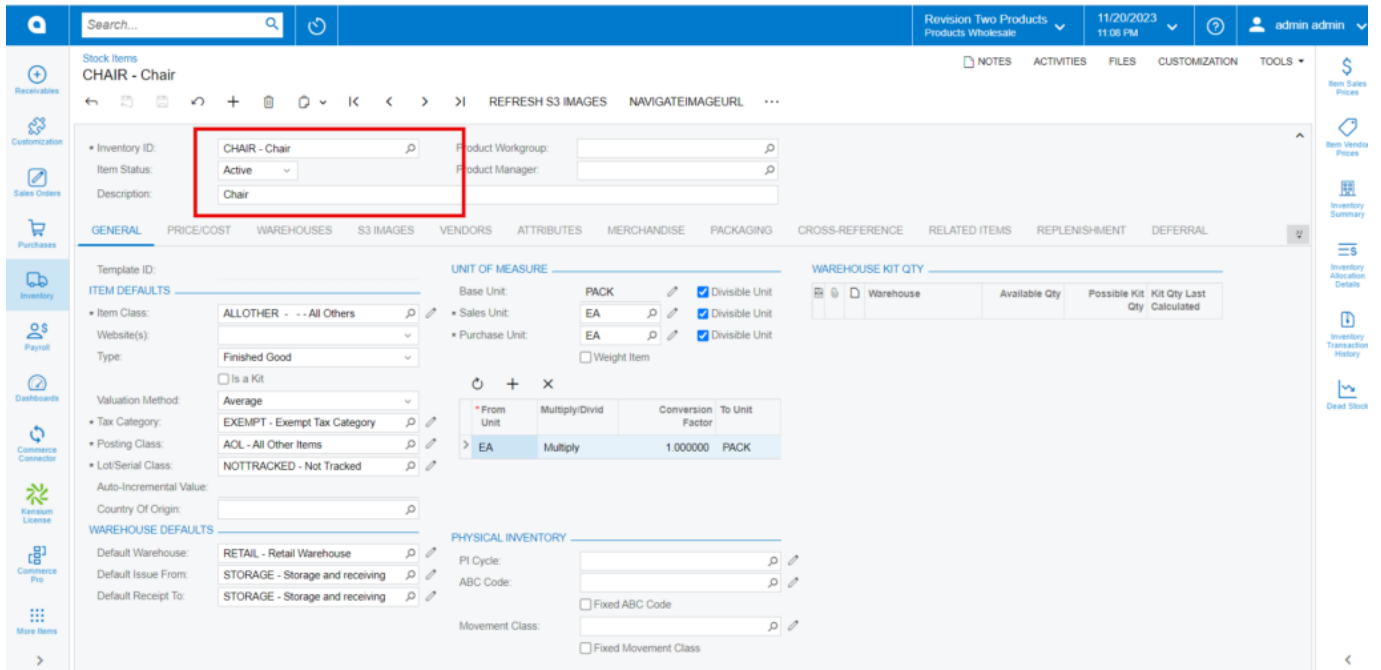
Inventory ID	Description	Type	InventoryItem_Formula409f715596d445078a35c3c94f9f9836	Item Class	Posting Class	Tax Category	Default Warehouse	Bas Unit
AACOMPUT01	Acer Laptop Computer updated	Finished Good	PROOWHOLE,SERVEAST,PROORETAIL	ALLOTHER --	AOL	EXEMPT	RETAIL	EA
AALGOS00	Lego 500 piece set	Finished Good	SERVEAST	CONSUMER -300...	CON	TAXABLE	RETAIL	EA
AAMACHINE1	Injection molding machine - serial numbered	Finished Good	SERVEAST,WEST KEN	INDEQUIP -300-M...	IND	EXEMPT	WHOLESALE	EA
AAPOWERAID	Poweraid 32 Oz - lot numbered	Finished Good	SERVEAST,WHOLESALE,TESTRETAIL	FOOD -300-PKGF...	FDI	EXEMPT	WHOLESALE	EA
ADAPTORS	Adaptors	Finished Good		ALLOTHER --	AOL	EXEMPT	RETAIL	EA
AIRPODS	Airpods	Finished Good		ALLOTHER --	AOL	EXEMPT	RETAIL	EA
AMS50WINDO	350 Series Window	Finished Good		MFGFG --	AOL	EXEMPT	WHOLESALE	EA
AMCON005	Stainless Cap Hob - 90 deg. A type 50mm ...	Finished Good		MFGFG --	AOL	EXEMPT	WHOLESALE	EA
AMCON006	Stainless Cap Hob - 90 deg. A type 50mm ...	Finished Good		MFGFG --	AOL	EXEMPT	WHOLESALE	EA
AMCON009	Stainless Cap Hob - Straight A type 50mm ...	Finished Good		MFGFG --	AOL	EXEMPT	WHOLESALE	EA
AMCON010	Stainless Cap Hob - Straight A type 50mm ...	Finished Good		MFGFG --	AOL	EXEMPT	WHOLESALE	EA
AMCOTTON	Cotton	Component Part		MFGPUR --	AOL	EXEMPT	WHOLESALE	EA
AMCTOBAT	Custom Wooden Bat	Finished Good		MFGFG --	AOL	EXEMPT	WHOLESALE	EA
AMDCORDH01	Double Hung Configured Door	Finished Good		MFGFG --	AOL	EXEMPT	WHOLESALE	EA
AMDCORSH01	Single Hung Configured Door	Finished Good		MFGFG --	AOL	EXEMPT	WHOLESALE	EA
AMFD.001	FD.001 Door	Finished Good		MFGFG --	AOL	EXEMPT	WHOLESALE	EA
AMKEURIG45	Keurig Model 450	Finished Good		MFGFG --	AOL	EXEMPT	WHOLESALE	EA
AMPPIPECVR	Custom Pipe Cover	Finished Good		MFGFG --	AOL	EXEMPT	WHOLESALE	PA

1-18 of 315 records

1 of 18 pages

Stock Items

- You need to create a new **[Inventory ID]**.
- Select the **[Item status]** from the drop-down.
- You can add the **[Description]** about the created item.



Stock Items
CHAIR - Chair

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

GENERAL | PRICE/COST | WAREHOUSES | S3 IMAGES | VENDORS | ATTRIBUTES | MERCHANDISE | PACKAGING | CROSS-REFERENCE | RELATED ITEMS | REPLENISHMENT | DEFERRAL

ITEM DEFAULTS

- Item Class: ALLOTHER - -- All Others
- Website(s):
- Type: Finished Good
- Valuation Method: Average
- Tax Category: EXEMPT - Exempt Tax Category
- Posting Class: AOL - All Other Items
- Lot/Serial Class: NOTTRACKED - Not Tracked

UNIT OF MEASURE

Base Unit: PACK
Sales Unit: EA
Purchase Unit: EA

From Unit	Multiply/Divid	Conversion Factor	To Unit
EA	Multiply	1.000000	PACK

WAREHOUSE KIT QTY

Warehouse	Available Qty	Possible Kit Qty	Kit Qty Last Calculated

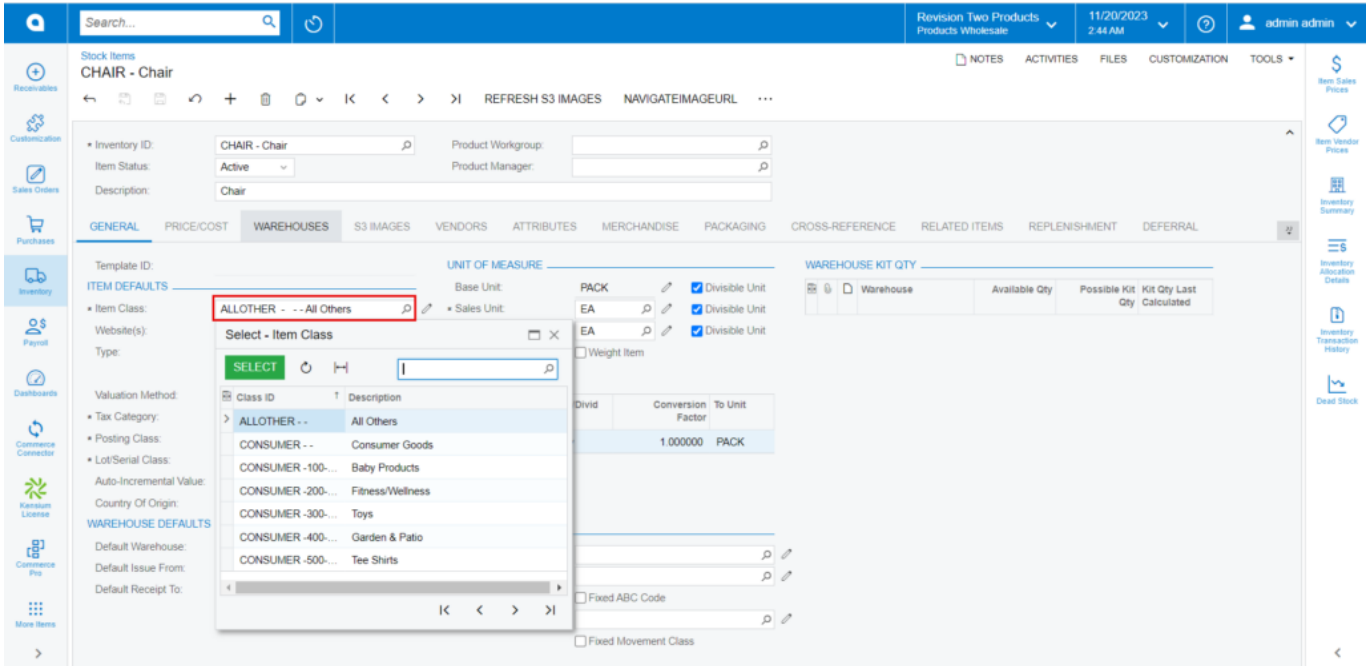
PHYSICAL INVENTORY

PI Cycle:
ABC Code:
Movement Class:

Stock Items

GENERAL

- You need to search for **[Item class]** from the existing options.



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 REPLENISHMENT DEFERRAL

Template ID:
ITEM DEFAULTS

Item Class: ALLOTHER - - -All Others

Website(s):
Type:

Valuation Method:
Tax Category:
Posting Class:
Lot/Serial Class:
Auto-Incremental Value:
Country Of Origin:

WAREHOUSE DEFAULTS

Default Warehouse:
Default Issue From:
Default Receipt To:

UNIT OF MEASURE

Base Unit:
Sales Unit:

PACK

Divid

Conversion Factor

To Unit

Warehouse Kit Qty

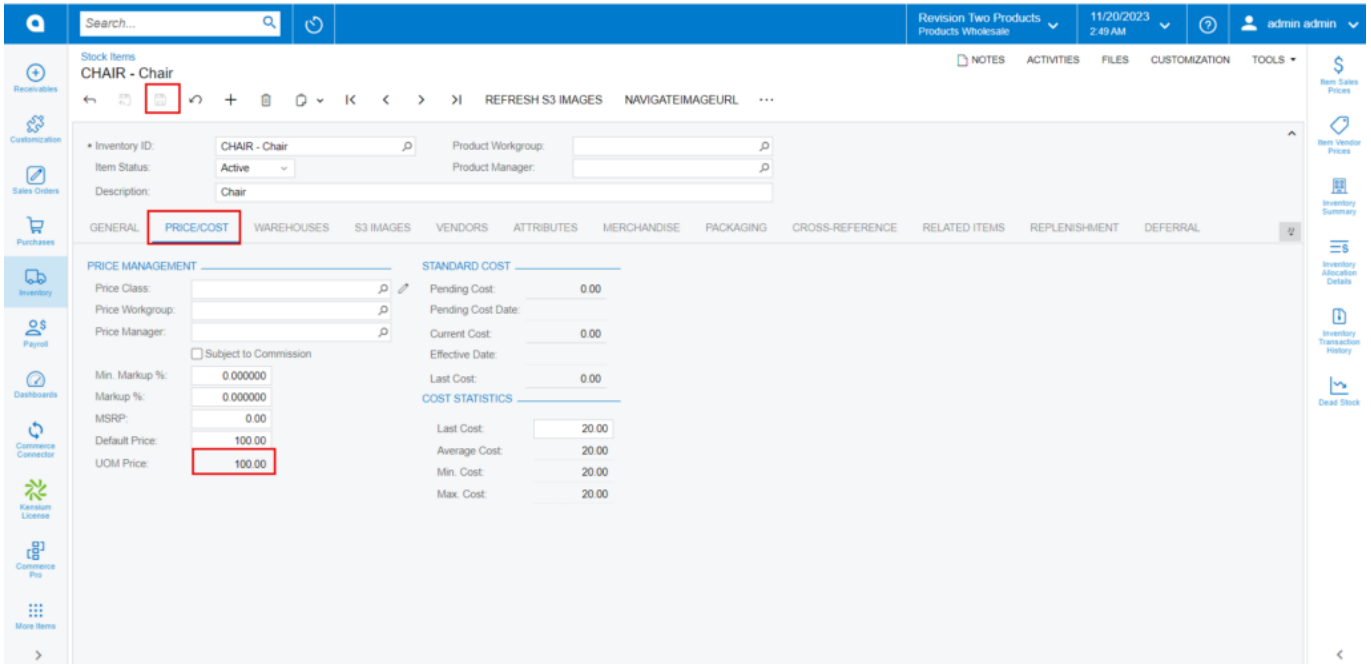
Warehouse	Available Qty	Possible Kit Qty	Last Qty Calculated

Fixed ABC Code
Fixed Movement Class

Item Class

PRICE/COST

- You must enter the price in **[Default Price]** field.



The screenshot shows the 'PRICE/COST' tab for a stock item named 'CHAIR - Chair'. The 'UOM Price' field is highlighted with a red box and contains the value '100.00'. Other fields include 'Price Class', 'Price Workgroup', 'Price Manager', 'Min. Markup %', 'Markup %', 'MSRP', 'Default Price', and 'UOM Price'. The 'STANDARD COST' section shows 'Pending Cost' and 'Current Cost' both at 0.00, and 'Last Cost' at 0.00. The 'COST STATISTICS' section shows 'Last Cost', 'Average Cost', 'Min. Cost', and 'Max. Cost' all at 20.00.

Price/cost

- Click on **[Save]**.

Adding Quantity to the Stock Items

- You must navigate to the left side of Acumatica and click on **[Inventory]** and then click on **[Receipts]** under **[Transactions]**.
- Click on **[+]** icon, then you will be redirected to Receipts screen.

Search... Revision Two Products Products Wholesale 11/20/2023 9:27 PM admin admin

Receipts CUSTOMIZATION TOOLS

Receipts + 🔍 🔄 📄

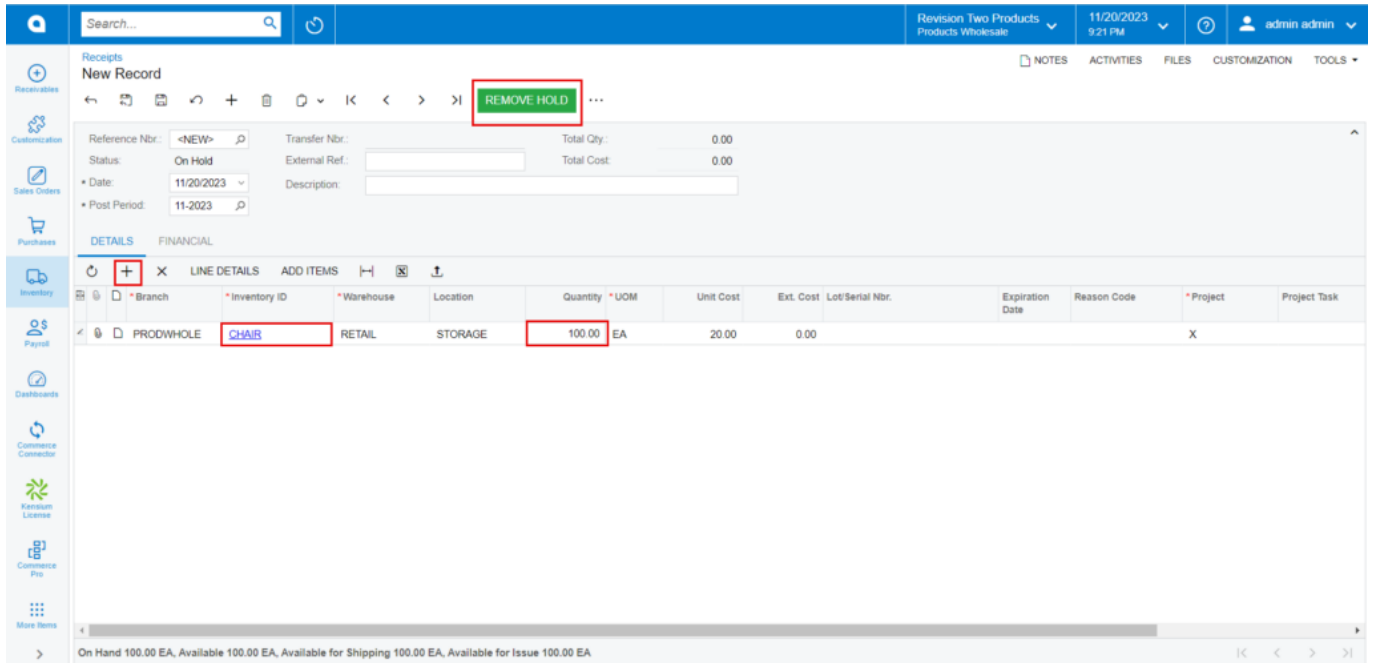
Status: All ▼ Date: All ▼

Document Type	Reference Nbr.	Status	Date	Post Period	Total Qty.	Total Cost	Batch Nbr.	Created On
Receipt	001841	Released	11/19/2023	11-2023	5.00	0.00	00007593	11/19/2023
Receipt	001840	Released	11/19/2023	11-2023	5.00	0.00	00007592	11/19/2023
Receipt	001839	Released	11/19/2023	11-2023	5.00	0.00	00007591	11/19/2023
Receipt	001838	Released	11/16/2023	11-2023	100.00	2,000.00	00007590	11/16/2023
Receipt	001837	Released	11/14/2023	11-2023	60.00	0.00	00007588	11/14/2023
Receipt	001836	Released	10/23/2023	10-2023	100.00	2,000.00	00007584	10/23/2023
Receipt	001835	Released	10/22/2023	10-2023	5.00	100.00	00007582	10/22/2023
Receipt	001834	Released	10/22/2023	10-2023	10.00	549.70	00007581	10/22/2023
Receipt	001833	Released	10/22/2023	10-2023	65.00	0.00	00007580	10/22/2023
Receipt	001832	Released	9/26/2023	09-2023	10.00	0.00	00007579	9/26/2023
Receipt	001831	Released	9/26/2023	09-2023	10.00	0.00	00007578	9/26/2023
Receipt	001830	Released	9/26/2023	09-2023	50.00	0.00	00007577	9/26/2023
Receipt	001829	Released	9/21/2023	09-2023	15.00	0.00	00007576	9/21/2023
Receipt	001828	Released	9/20/2023	09-2023	50.00	0.00	00007572	9/20/2023
Receipt	001827	Released	9/19/2023	09-2023	15.00	0.00	00007571	9/19/2023
Receipt	001826	Released	9/19/2023	09-2023	0.00	0.00	00007570	9/19/2023
Receipt	001825	Released	9/1/2023	09-2023	100.00	0.00	00007566	9/1/2023
Receipt	001824	Released	9/1/2023	09-2023	15.00	0.00	00007565	9/1/2023
Receipt	001823	Released	9/1/2023	09-2023	100.00	0.00	00007564	9/1/2023

1-19 of 1655 records 1 of 88 pages

Receipts

- Click on **[+]** icon under **[Details]** and search for the created **[Inventory ID]**.
- Enter the **[Quantity]**.
- Click on **[Save]**.
- Click on **[Remove Hold]**.



Receipts
New Record

Reference Nbr.: <NEW> Transfer Nbr.: Total Qty.: 0.00
 Status: On Hold External Ref.: Total Cost: 0.00
 Date: 11/20/2023 Description:
 Post Period: 11-2023

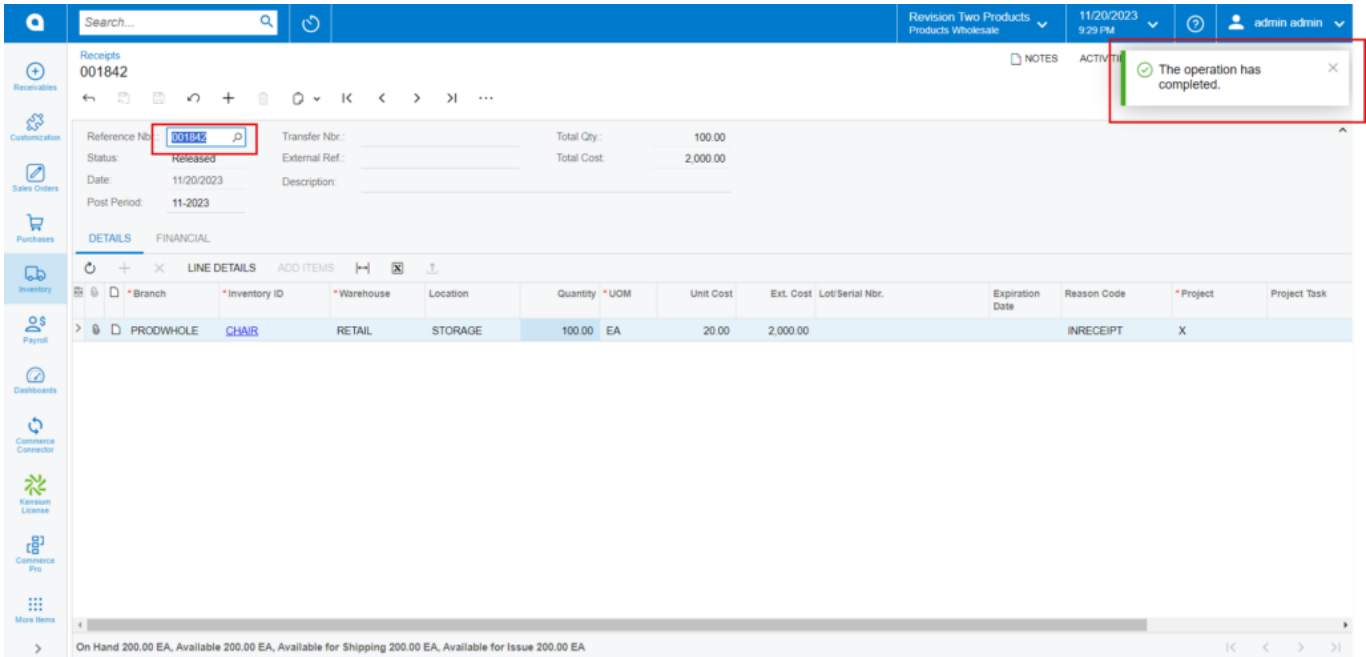
DETAILS FINANCIAL

Branch	Inventory ID	Warehouse	Location	Quantity	UOM	Unit Cost	Ext. Cost	Lot/Serial Nbr.	Expiration Date	Reason Code	Project	Project Task
PRODWHOLE	CHAIR	RETAIL	STORAGE	100.00	EA	20.00	0.00				X	

On Hand 100.00 EA, Available 100.00 EA, Available for Shipping 100.00 EA, Available for Issue 100.00 EA

Receipts

- Upon clicking **[Remove Hold]** the **[Reference Nbr.]** will appear and **[The Operation Completed]** message will pop-up on the screen.



Receipts
001842

Reference No: 001842
Status: Released
Date: 11/20/2023
Post Period: 11-2023

Transfer Nbr.:
External Ref.:
Description:

Total Qty.: 100.00
Total Cost: 2,000.00

DETAILS FINANCIAL

Branch	Inventory ID	Warehouse	Location	Quantity	UOM	Unit Cost	Ext. Cost	Lot/Serial Nbr.	Expiration Date	Reason Code	Project	Project Task
PRODWHOLE	CHAIR	RETAIL	STORAGE	100.00	EA	20.00	2,000.00			INRECEIPT	X	

On Hand 200.00 EA, Available 200.00 EA, Available for Shipping 200.00 EA, Available for Issue 200.00 EA

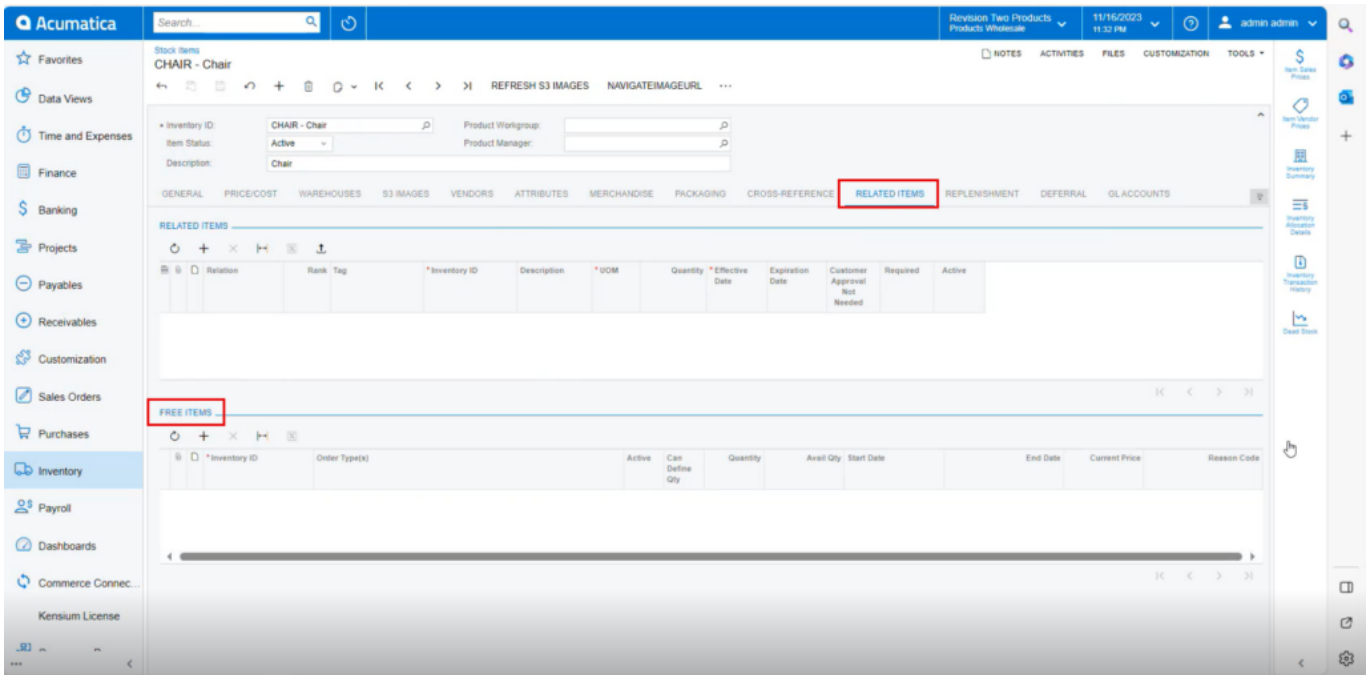
Receipts

- Upon adding the Quantity to the stock items, you must navigate back to stock items screen and click on **[Related Items]** tab to add the free item.

RELATED ITEMS

The Free items that you are supplying to the consumer with the parent item should be added under **[FREE ITEMS]**.

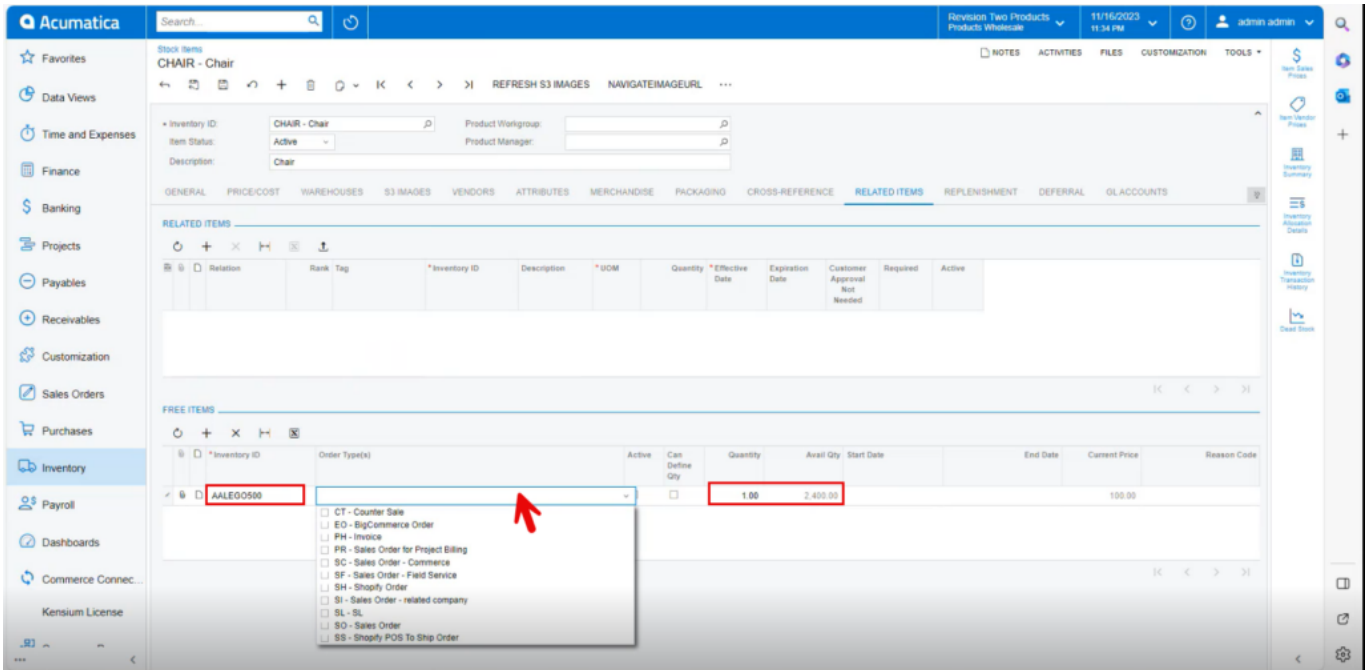
- Click on **[+]** icon.
- Search for the **[Inventory ID]** from the existing stock items.



The screenshot shows the Acumatica interface for a stock item named "CHAIR - Chair". The "RELATED ITEMS" tab is selected and highlighted with a red box. Below this tab, there is a table with the following columns: Relation, Rank, Tag, *Inventory ID, Description, *UOM, Quantity, *Effective Date, Expiration Date, Customer Approval, Required, and Active. The table is currently empty. Below the "RELATED ITEMS" table, there is a "FREE ITEMS" section, also highlighted with a red box, which contains a table with columns: *Inventory ID, Order Type(s), Active, Can Define Qty, Quantity, Avail Qty, Start Date, End Date, Current Price, and Reason Code. The "Avail Qty" column is highlighted with a red box in the original image.

Related Item

- Upon selecting the stock items, the **[Avail Qty]** will appear on the screen.
- Select the **[Order Type]** from the drop-down menu.



The screenshot shows the Acumatica interface for a stock item named 'CHAIR - Chair'. The 'FREE ITEMS' table contains one entry with the following details:

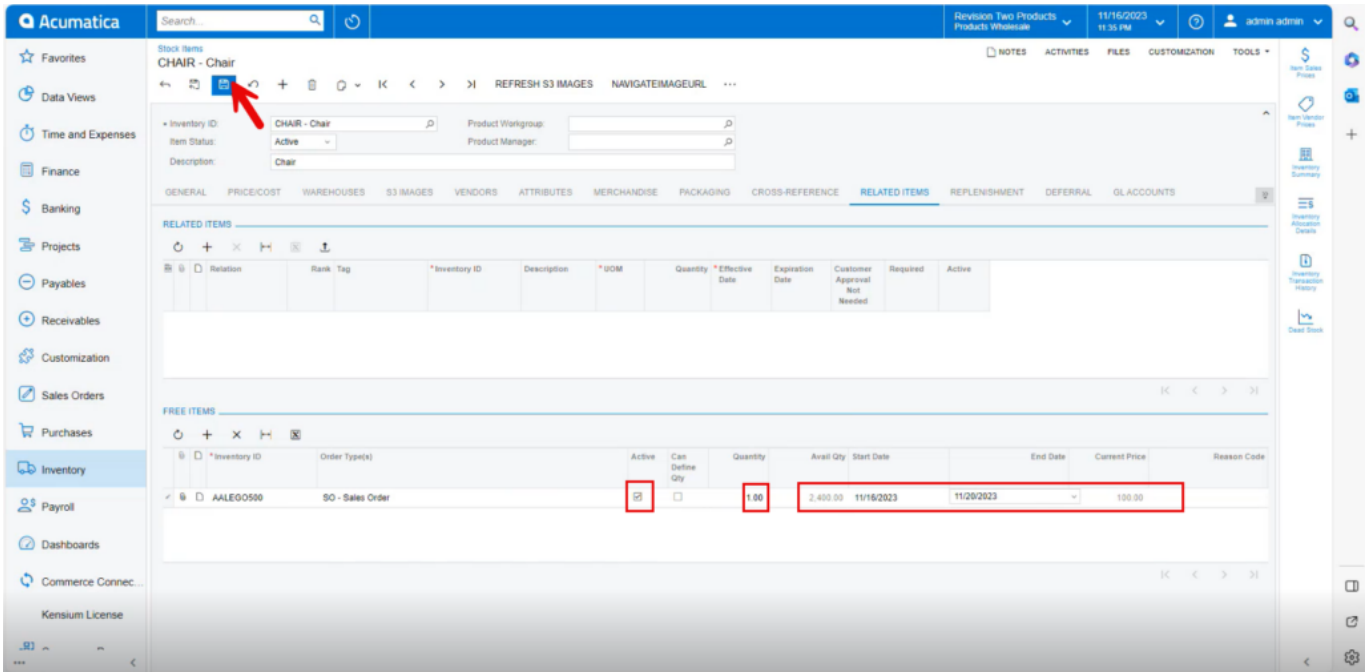
Inventory ID	Order Type(s)	Active	Can Define Qty	Quantity	Avail Qty	Start Date	End Date	Current Price	Reason Code
AALE00580	[Dropdown Menu]	<input type="checkbox"/>	<input type="checkbox"/>	1.00	2,400.00			100.00	

The dropdown menu for 'Order Type(s)' includes the following options:

- CT - Counter Sale
- EO - BigCommerce Order
- PI - Invoice
- PR - Sales Order for Project Billing
- SC - Sales Order - Commerce
- SF - Sales Order - Field Service
- SH - Shopify Order
- SI - Sales Order - related company
- SL - SL
- SO - Sales Order
- SS - Shopify POS To Ship Order

Order Type

- You must enable the [**Active**] radio button, then only the select free item will display in the sales orders screen.
- Enter the [**Quantity**].
- Enable the Check box for [**Can Define Qty**].
- You must select the [**Start**] and [**End**] dates, for the offer to be valid.
- The price of the selected free item will be displayed in the [**Current Price**] column.



Acumatica

CHAIR - Chair

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

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
AALEGO590	SO - Sales Order	<input checked="" type="checkbox"/>	<input type="checkbox"/>	1.00	2,400.00	11/16/2023	11/20/2023	100.00	

Enable the Checkbox

- Click on **[Save]**.