How to Add Item - Inventory Type

- 1. From Inventory module > click on Items menu.
- 2. The Search screen for Items will be shown. Click New toolbar button.
- 3. This will open a new Item screen. blocked URL
- 4. In the Details tab, enter Item No and Description.
- 5. In the Item Type field select Inventory. The Inventory Item type is used for regular items you purchase. This item type tracks stock quantities.

Item - Test Iten	1 No.							^		×
New Save Se	earch Delete Undo Duplicate Close									
Details Setu	Pricing Stock Factory & Lines Activities Attachments	5 /	Audit Log							
Item No 🔹	Test Item No.		Status	Active	~	Inv. Valuation	Item Level			
Item Type	Inventory	~	Commodity		~	Brand				~
Short Name	Bundle		Category		~	Model No				
Description +	Inventory		Lot Tracking	No	~	Manufacturer				~
	Kit		_				Use Weigh S	ales		
	Finished Good									
11-1-1-1-1-1-1-1-1-1-1-1-1-1-1-1-1-1-1-1	Non-Inventory									
Unit of Measu	Other Charge									6.7
+ Insert X	Raw Material									6.2
Unit [*]	Service		le		Stock U	Init Allow Purch	ase Allow Sal	e	Max	Qty
	Software									0.00
	Comment									

a. Item Types:

- i. Bundle The Bundle type is used to enter a group of individual items for sales or purchase transactions. Since this item type groups other inventory item types, it will follow those inventory types for tracking stock. The Bundle Details tab will then be visible to allow you to specify items that are part of the bundle.Can be used for 'Basket' concept of international trading. Basket is a selection of items from which an item will be finally received or sold.
- ii. Inventory The Inventory Item type is used for regular items you purchase. This item type tracks stock quantities.
- iii. Finished Good The Finished Good type is used for items which are finished goods of a manufacturing process. This type tracks stock. Similar to Assembly type but has more complex application and can have work in progress stock.
- iv. Non-Inventory The Non-Inventory type is used for items you purchase like materials or office supplies. This item type does not track stock quantities. Miscellaneous description can be entered in transaction screens for this item type.
- v. Other Charge The Other Charge type is used for miscellaneous charges such as setup fees, delivery charges, permits, surcharge, brokerage, rent etc. These charges can be added to inventory cost and can be setup to calculate based on the volume of inventory involved. For example, freight and surcharges on freight for inventory receipt. These appear on Other Charges tab of Inventory Receipt and Shipment. This type does not track stock quantities.
- vi. Raw Material The Raw Material Type can be used as an ingredient to manufacture, blend, mill or assemble an item. This type tracks stock quantities.Level 4 (Materials) could be used in any formula as an ingredient but could not be a formula (Summit)
 vii. Service The Service type is used for services which the company provide like consulting, labor, fees, etc. This item type does not track stock quantities.
- viii. Software This is a non inventory type used to purchase and sell software products.
- 6. In the Lot Tracking field select whether the item is Lot Tracked or not. For this example set the lot tracking as No.
 - a. Select Yes-Serial Number if the item is lot tracked and will use the predefined lot number from the Starting Numbers screen. How to Add a Lot Tracked Item (Serial Number)
 - b. Select Yes-Manual if the item is lot tracked and will manually enter the lot number. How to Add a Lot Tracked Item (Manual)
 - c. Select Yes-Manual/Serial When receiving items, user can either manually enter lot number or leave the field blank and it will auto
 - generate upon posting of the receipt. How to Add a Lot Tracked Item (Manual/Serial Number)
 - d. Select No if he item is not lot tracked. How to Add a Non-Lot Tracked Item
- 7. Fill in other information as needed.

ltem - Item A1					□ ×
New Save Search Delete Undo Duplicate Close					
Details Setup Pricing Commodity Add-On Substitute	Factory & Lines Activities	Attachments Audit Log Repo	ort Translations		
Item No * Item A1	Status	Active	 Inv. Valuation 	Item Level	
Item Type Inventory	 Commodity 	Commodity-1	Brand		Q
Short Name	Category *	Item Category-1	 Model No 		
Description * Item A1 Desc Non Lotted Item	Lot Tracking	No	 Manufacturer 		٩,
		Use Weigh Scales			
Unit of Measure					
+ Insert × Remove + Alternate UPC Export - 🔠 View	Filter (F3)				КЛ И У
Unit * Unit Qty Short UPC	UPC Code	Stock Ur	hit Allow Purchase	Allow Sale	Max Qty
L Ib1 1.00		~	\checkmark	~	0.00
kg1 2.20462			>	~	0.00
10 lb bag 1 10.00			\checkmark	\checkmark	0.00
50 lb bag1 50.00			\checkmark	1	0.00
25 kg bag1 55.1156			\checkmark	>	0.00
50 kg bag1 110.231			>	>	0.00
60 kg bag1 132.277			~	>	0.00
0.00					0.00
? 🔘 🖓 0.46s Ready			Page	1 of 1 🕨 🖡	Refresh

8. Setup Unit of Measure. See How to Setup Item UOM.

- 9. Setup Item Locations. See How to Setup Item Location.
- Setup GL Accounts. See How to Setup GL Accounts for the items.
 Setup Tax for the item if it is taxable. See How to Setup Tax for an item.
- Setup Pricing. See How to Setup Item Pricing.
 Setup Pricing Level as needed. See How to Setup Pricing Level
- Setup Pricing Lotor ac notacle occup Pricing Lotor
 Setup Special Pricing as needed. See How to Setup Promotional Pricing.
 Save the record. You can click the Save toolbar button to save it. In case you miss to click this button and you click the Close toolbar button or the x button at the top right corner of the screen, i21 will prompt you if you would like to save it before closing the screen.