Advanced Stock Item Add

Adding an item

To create a new inventory item, click on the Add button

Fill in all the relevant information on the inventory item.

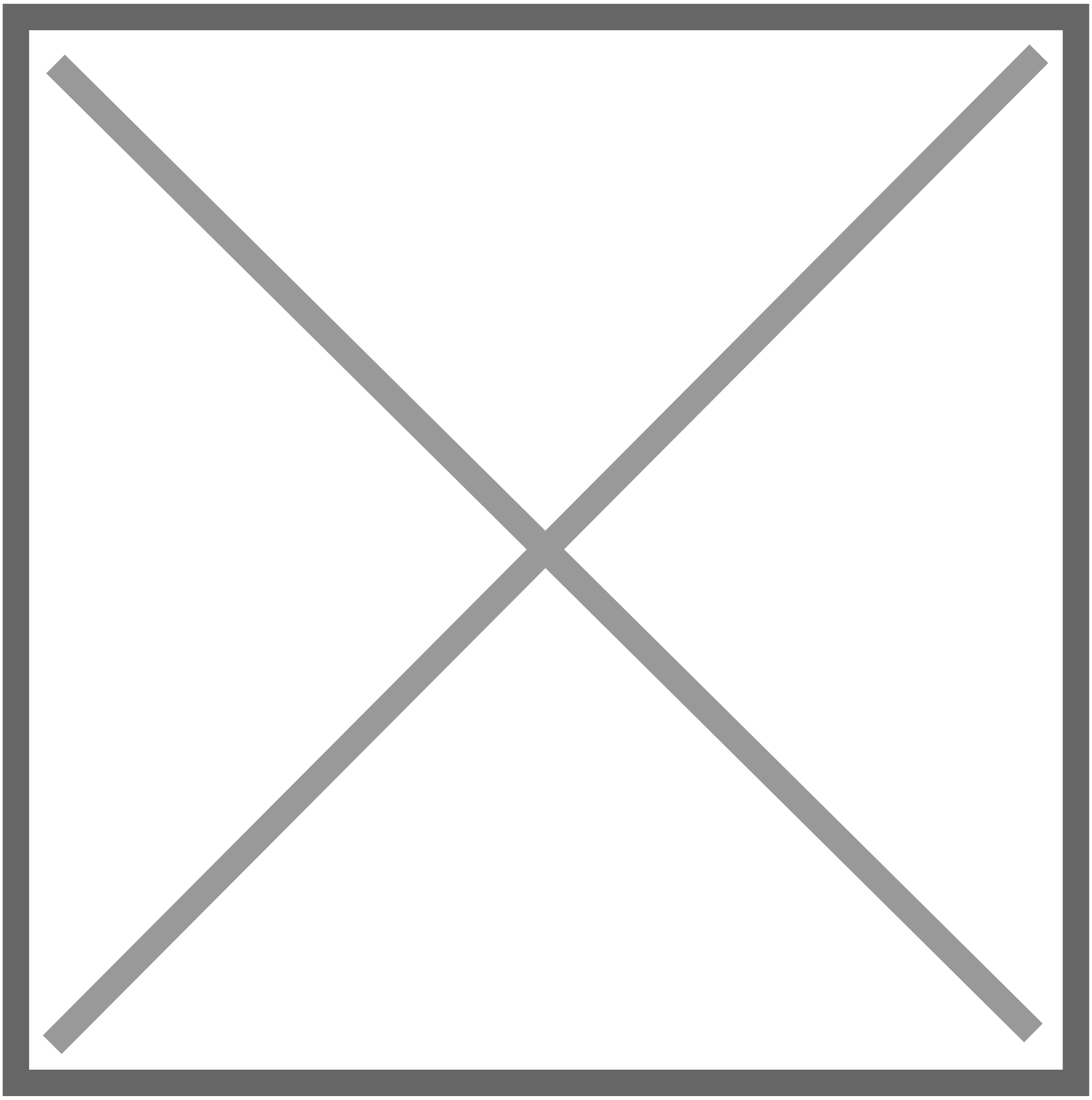
You will have to fill in the category type example, stock, service or custom.

Stock	physical items such as a ruler. Inventory items work with costing methods a. Latest cost or b. Average Cost. This is setup under the System Configuration Module-Administration – Reference Values.
Service	labour can be termed a service item. This does not track inventory. Service items cannot be used in the Goods Received Vouchers.
Custom	works the same as Service type. You can put sub-contractors work under this. This will appear in Goods Received Vouchers.
Fixed Assets	this type of inventory is only used to insert your fixed assets. You can put a cost value to it and run a report which will list all fixed assets with their cost value.

Note: The inventory code can be changed at any time.

General Details Tab

In the General Details tab fill in the static information.



Inventory Code	this is a unique code that identifies the Inventory Item. The Code field can be Alpha Numeric and over 200 Characters long.
Category	select the type of inventory item that is being created. There are four options, stock, service, custom and fixed asset.
Description	this is the name of the inventory item. The Description field can be Alfa Numeric and over 500 Characters long.
Long Description	this is extra information on the inventory item. You can have a very descriptive note on the item. This can be automatically copy when doing your lines in the document.

Primary Image	this is a drop down and only shows Images which have being uploaded as attachments. You can select a default image against the customer to show on the right-hand side.
Priority Level	to select priority level form the drop down arrow
Group Code	to select group code from the drop down arrow
Active	select if this item is active or not. To make an item inactive the item must have zero inventory on hand in all warehouses.
POS Item	tick if inventory item is a POS item
Internal Ref ID	Customer reference number for item

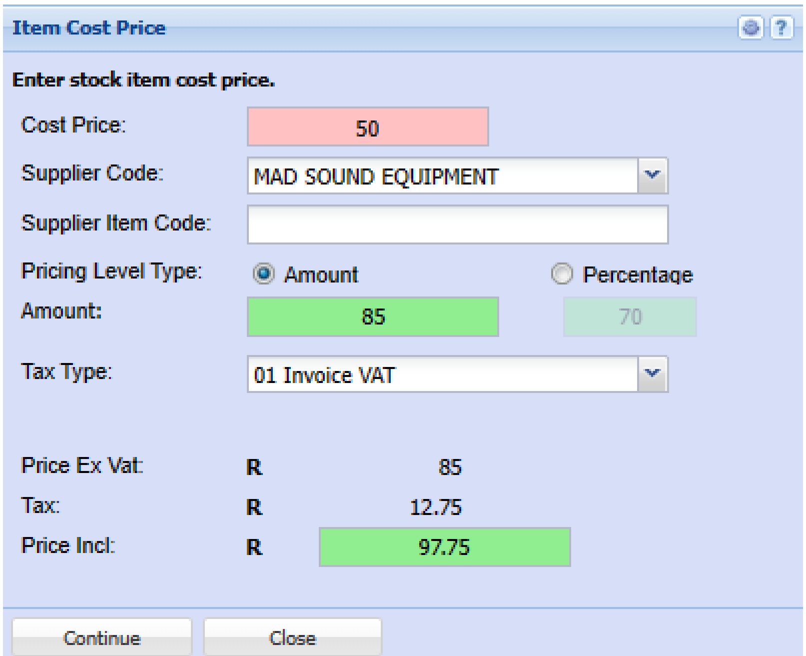
Cost Price Pop-up Screen

Enter the Item cost Price. Note if you do not enter a cost price at this stage, you will not be able to simply edit or add a cost price for a stock item later.

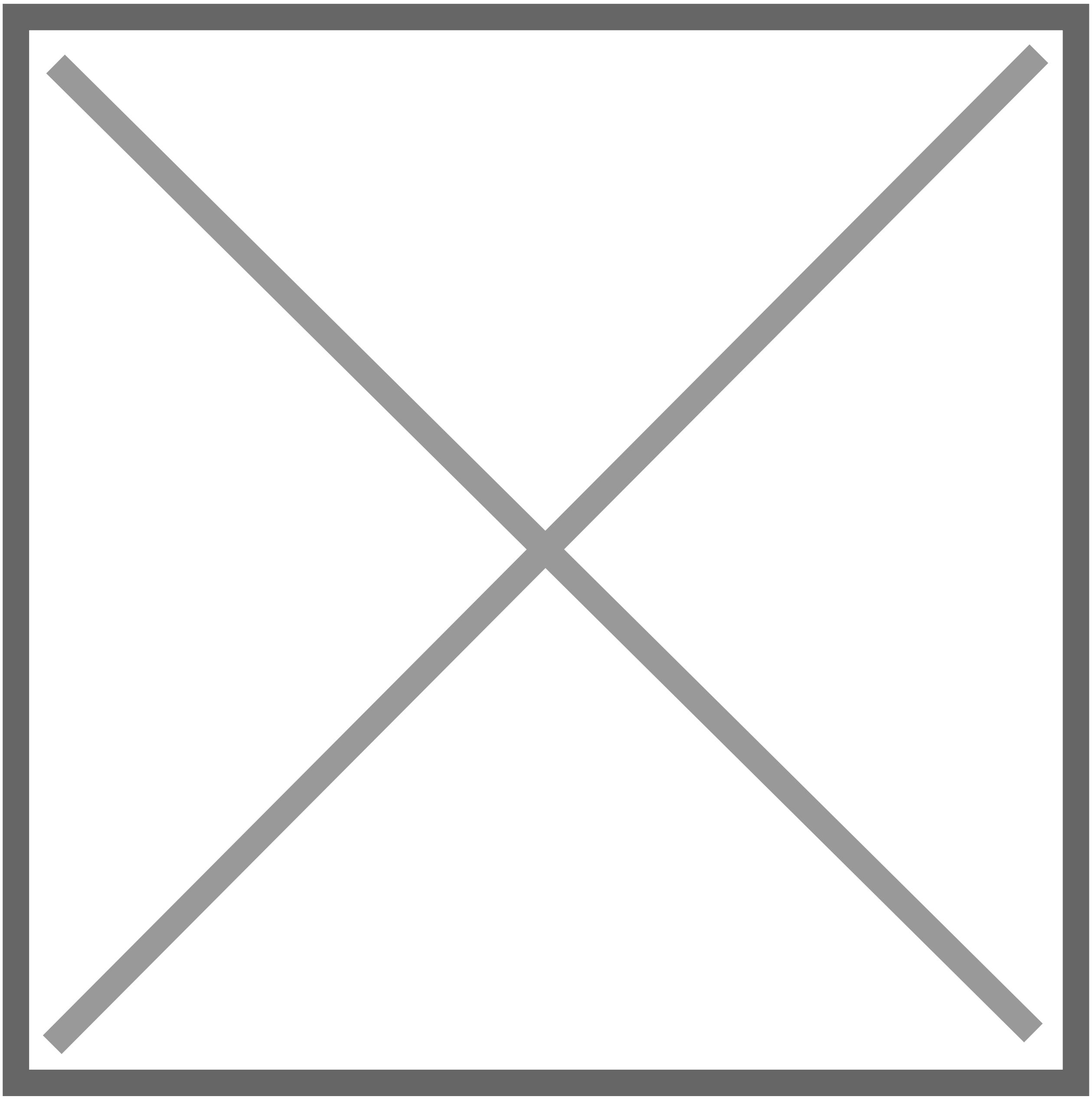
Select the selling price type

Enter either the mark up percentage or the selling price amount

Select the default supplier



More Details Tab



Unit of Measurement	this indicates the unit of measure of items. Case Lots uses this for its multiplication.
Default Supplier	set this drop down which is populated by the supplier’s button to your most commonly used supplier.
Tax Type	set a default tax type for this inventory item.
Account Type	only used in Custom and Service type items. This account replaces the inventory account and puts costs to the ledger account set here. Do not use inventory account when setting up your custom and service items.
Bar Code	insert a Bar Code for the item
Bin	Bin Location – Put in a note of the location of your inventory

Weight per unit	setup your weight per unit. You can select the stationery layout with weights column which will multiple the quantity by the weight and give you the total weight per line product.
Default Supplier Cost	tick this if you want to default your costing methods on the supplier cost.
Pricing Override	You can choose a pricing override for an item if you wish to run a special on this product. You will need to specify the start and end date of the special. The system will automatically revert back to the default pricing structure when the date of the special has come to an end.

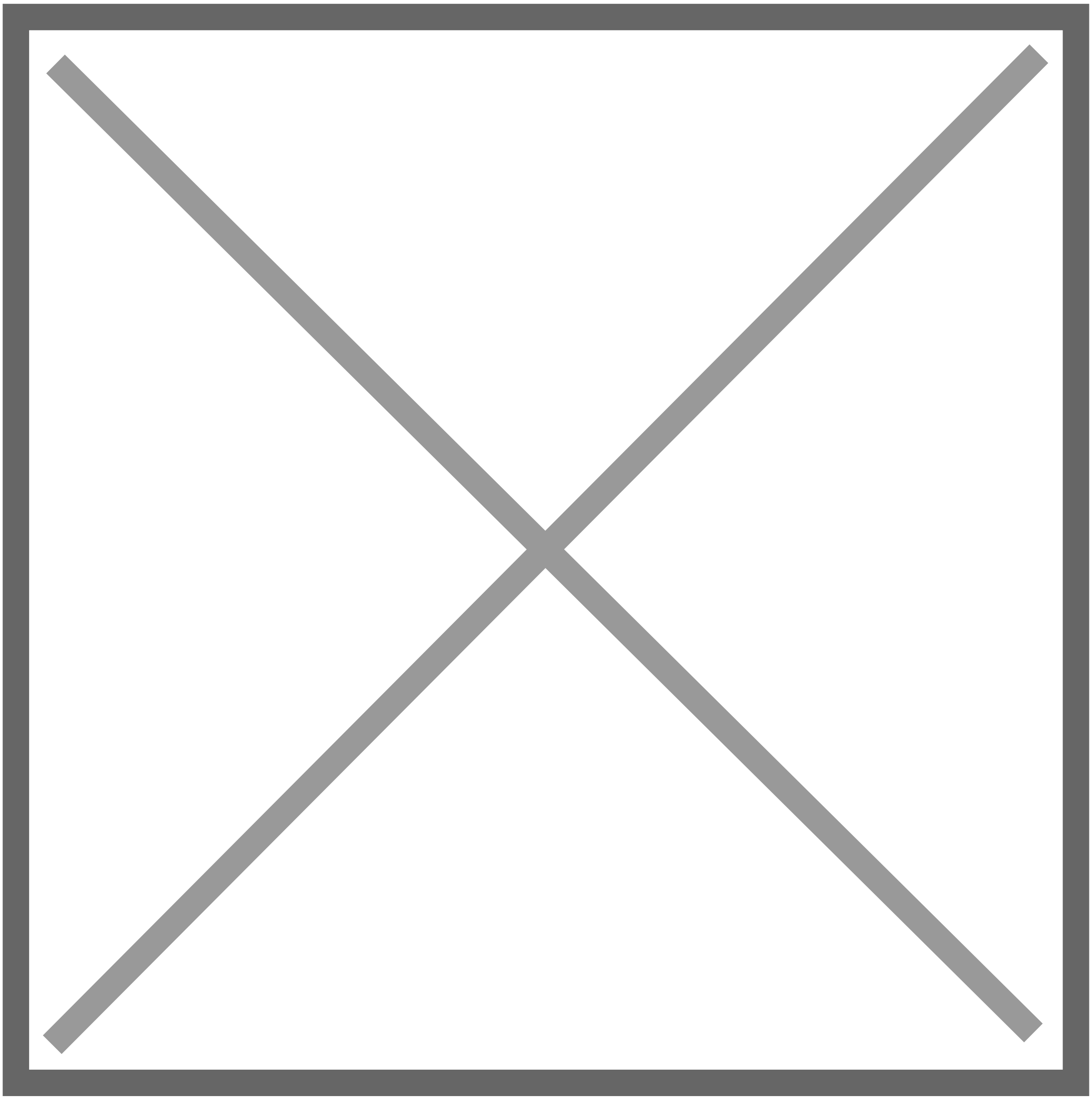
Serial No Tracking	tick if item code must be serial number tracked

Pricing Levels tab

You will have to setup a Pricing level for this item before closing. To setup a pricing level click on the Add button.

In this area, the cost price is important if it is an inventory type, if you do not put in a value of cost you will only be able to change this cost price via an Inventory Value Adjustment. This cost price is affect by your costing methods setup in System Configuration under Reference Values.

You will have to put in a Tax Type for this item before saving. In order to see the other tabs you will have to save this item.



Cost Price	this is the cost price of the item.
Stock	this is grayed out because it is governed by accounting costing methods found in the setting Reference Values under System Configuration. There are two types of costing methods

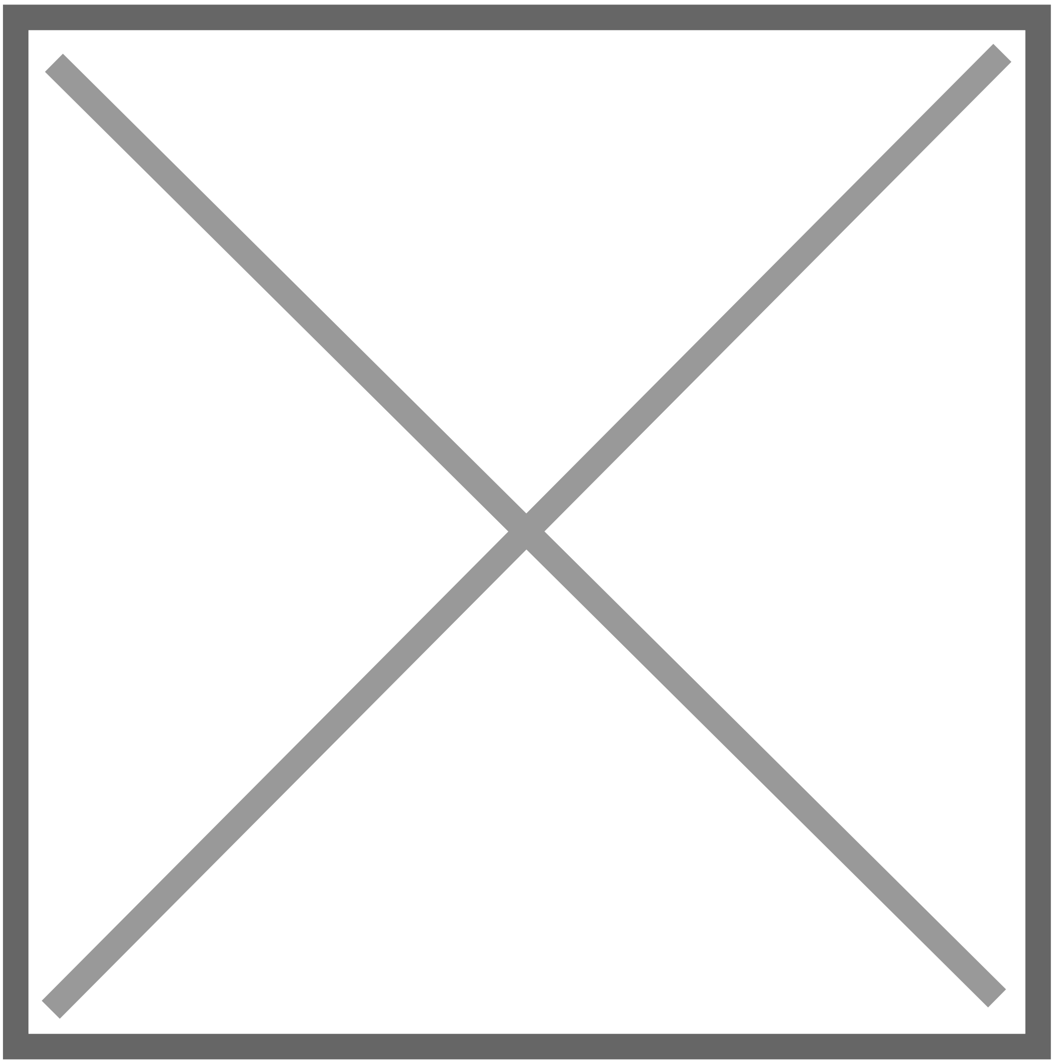
Average costing or latest costing methods. The average costing method is the most commonly used?

Service	this cost is open and the user can put in a cost value there which will be carried across when doing invoices. Use costing in service only if you are an advanced accounting user. Instead leave the cost at zero.

Custom	this cost is open and the user can put in a cost value there which will be carried across when doing invoices. This cost works on latest costing method and will be updated when this custom type item is used in a Goods Received Voucher.

In this area you can setup two ways to work out your end selling price

Amount	put in the amount you wish to sell the product at on an exclusive basis. The system will always bring up this selling price when selling irrespective of your cost price.
Percentage	you can create a percentage markup from your cost price. This percentage will change the selling price dependent on your cost price.



The difference between the two above is that should you chose Percentage this is good when a product is governed by currency rates and you do not want to lose profits.

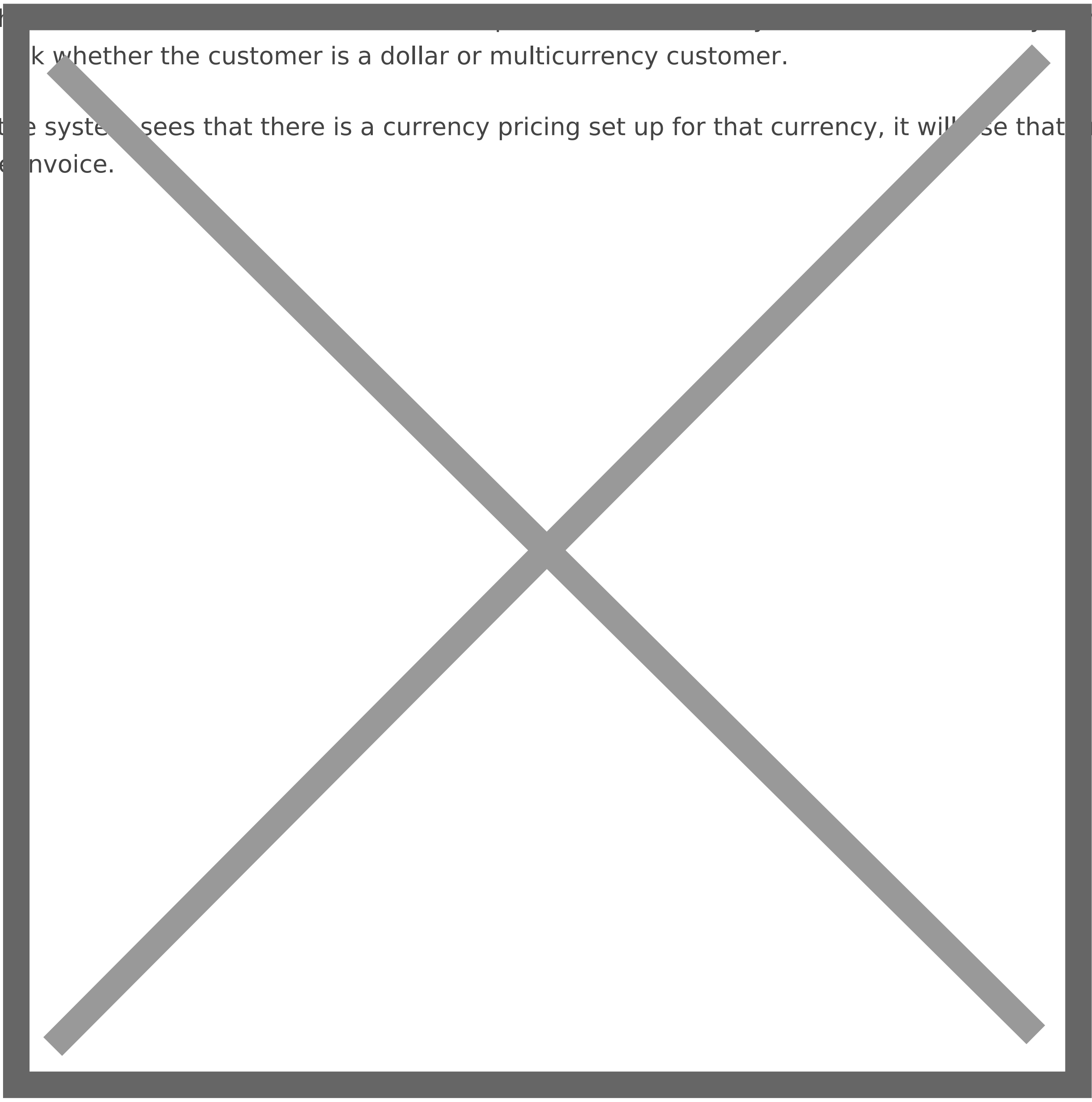
Once you have select your pricing level you will need to select a Default pricing level for this item.

Currency Pricing

This section allows the user to setup multiple currency pricing per item

The multicurrency pricing will work as follows; you add the excluding value for the item that you want to sell at for that particular currency.

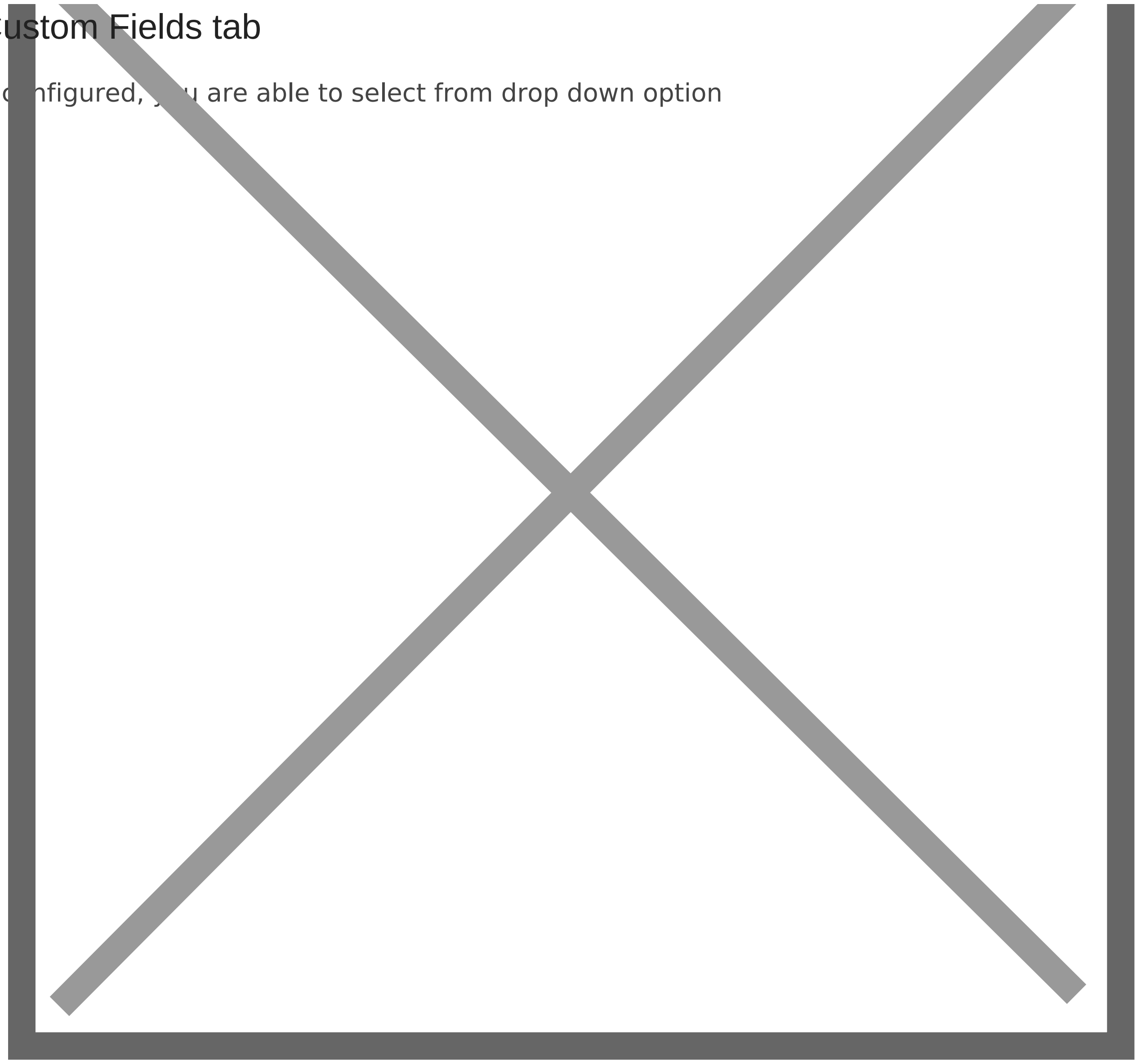
Wh [illegible] m will check whether the customer is a dollar or multicurrency customer.



If the system sees that there is a currency pricing set up for that currency, it will use that price on the invoice.

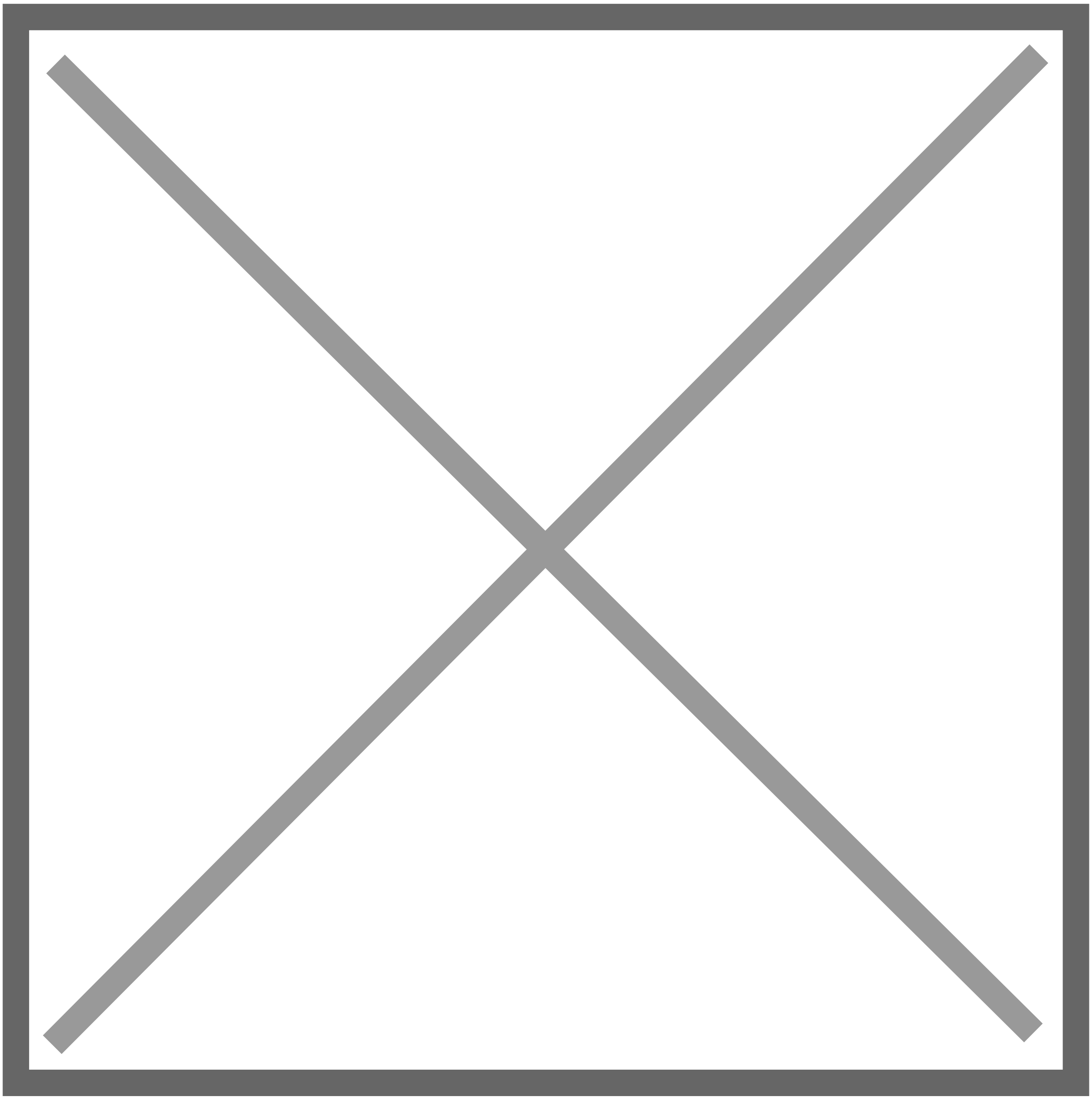
Custom Fields tab

If configured, you are able to select from drop down option



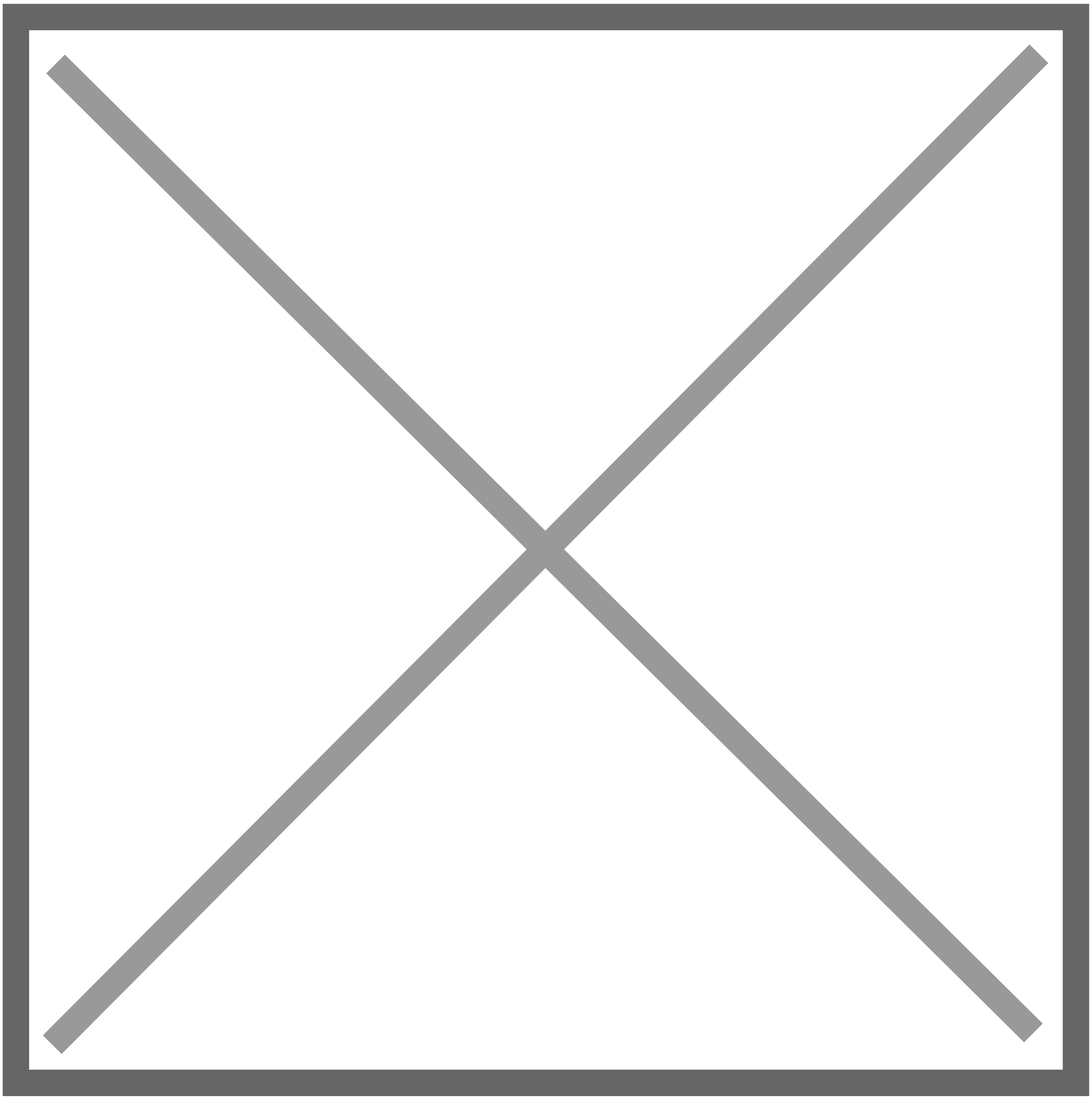
Bill of Materials tab

Activate bill of material - Please Note; only tick the Bill of Material box if this inventory item will be the result of a manufacturing process. However, this item can be a contributing item (recipe item) to another Bill of Material and in itself be a Bill of Material item.



Properties Tab

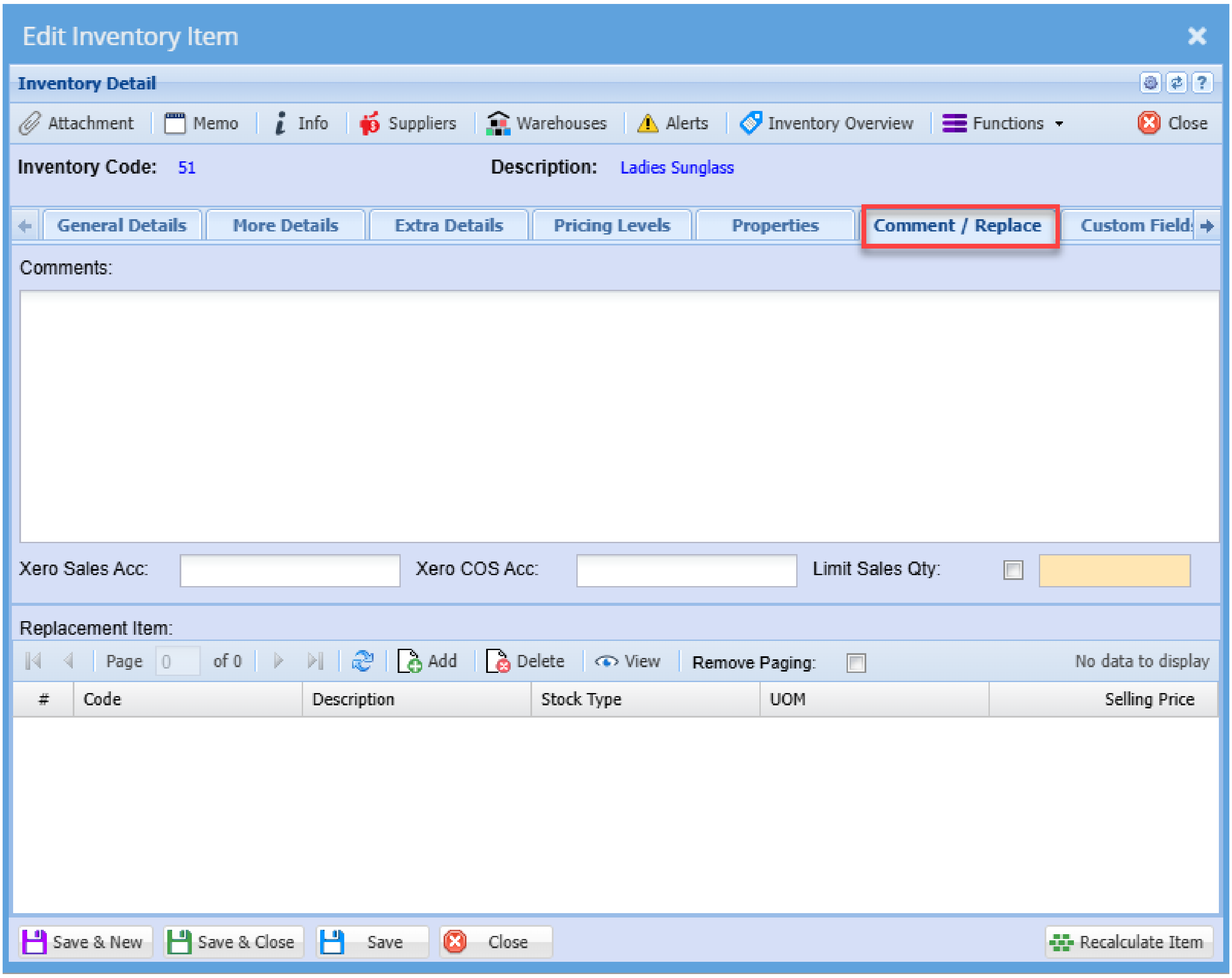
Add the dimensions of the inventory item



Comment or Replace Item Tab

The comment/ Replace tab allows a user to add items to substitute on the transaction documents

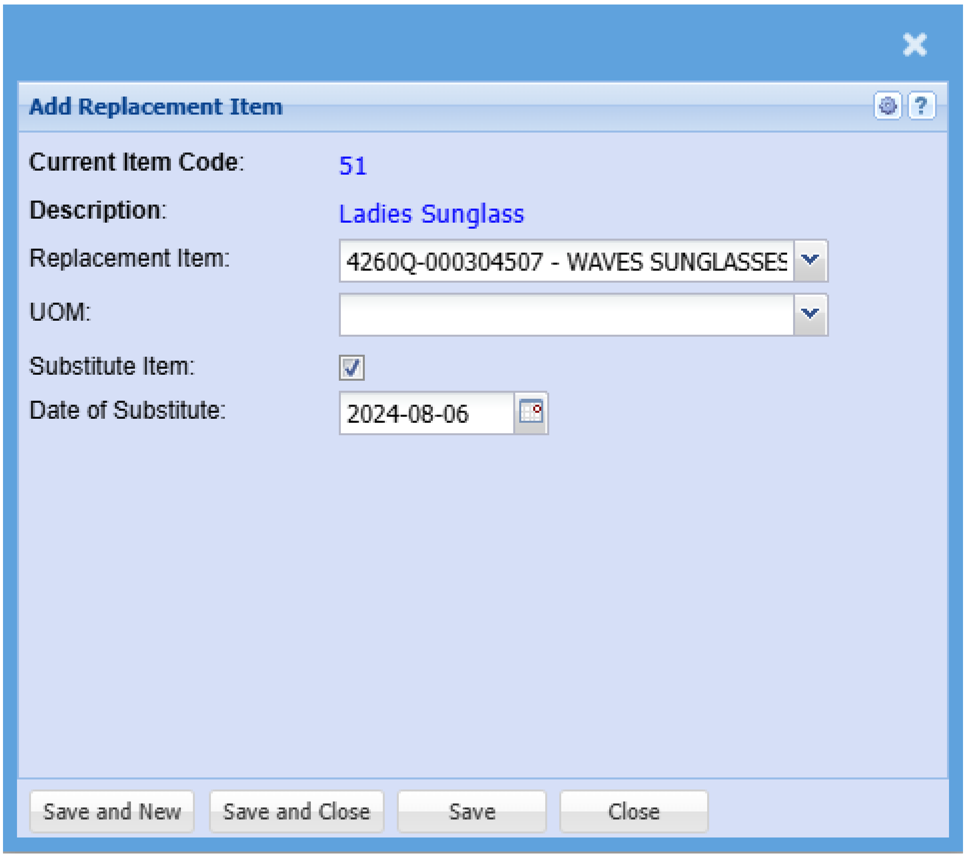
For this to work you need to set it up under this tab first



You can add all relevant comments about the item on the comments section and Xero accounts if linked to your Xero system.

To add a replacement item, click on Add

Then the screen below will pop up

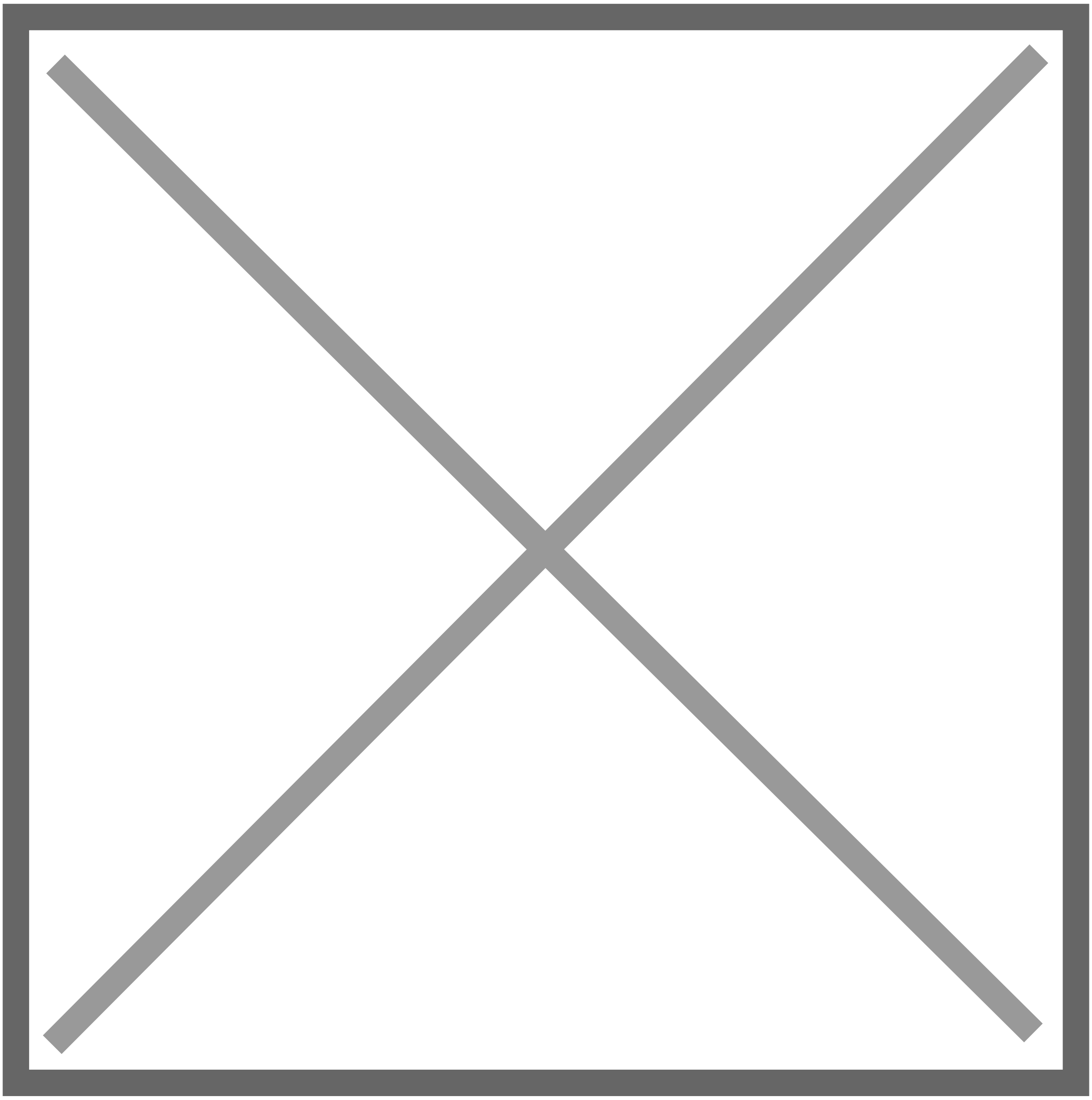


Current Item Code	This is the main item that you need to add a substitute item for
Description	This will prepopulate
Replacement Item	Select the item you want to add as a substitute for the main item You can add as many substitute for an item
UOM	Select the unit of measure if it is a unit of measure item
Substitute Item	Put a tick on the substitute item to make it active
Date of Substitute	Add a date of substitute

To add a substitute item to a sales document, [click here]

Spec tab

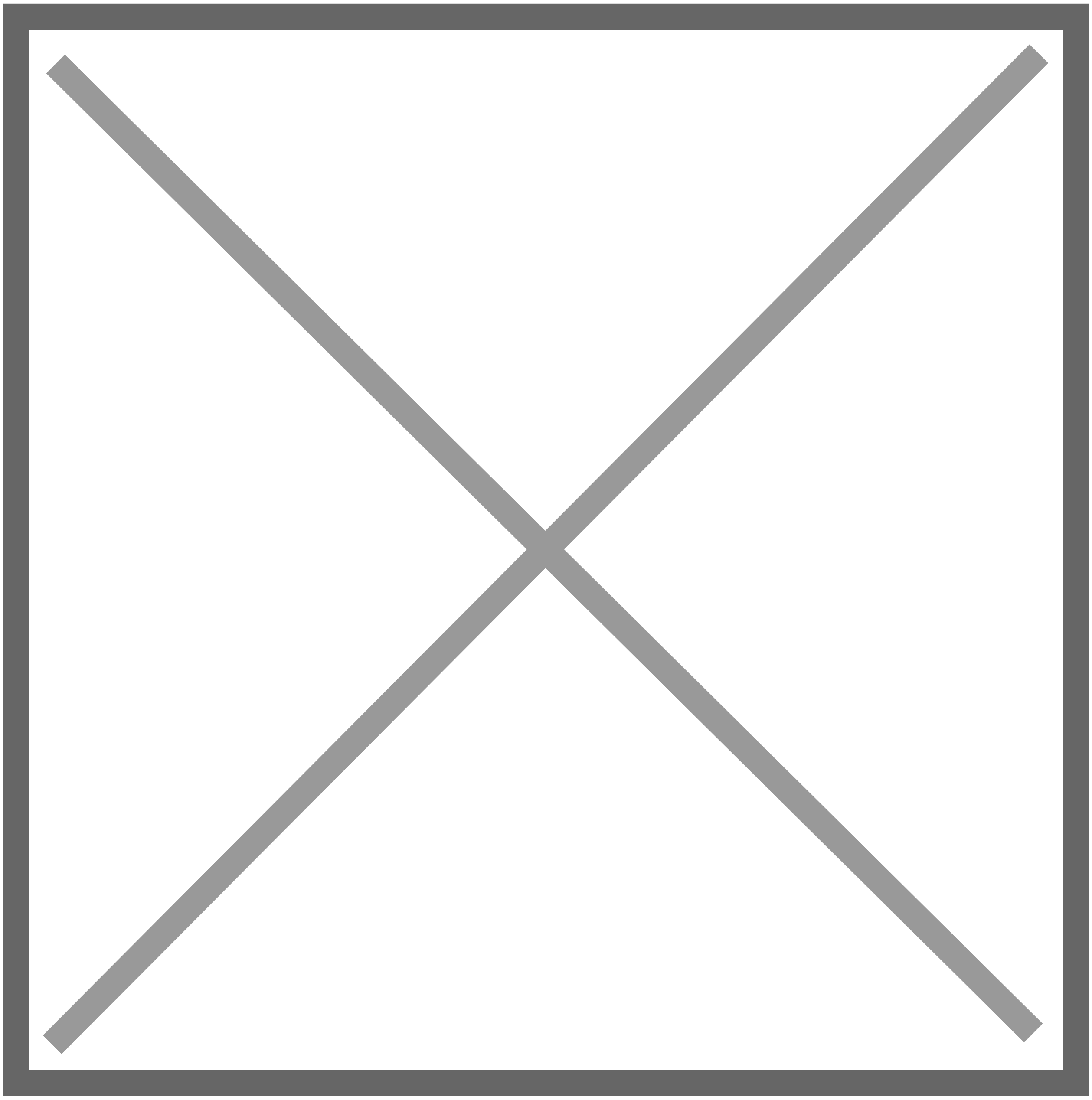
To add the specifications of the item



Reload Spec button	to reload the spec
Save Spec button	to save specs
Preview Spec button	allows the user to preview the spec
Export to PDF button	to export the spec onto a PDF file
Show Sample button	shows the sample of the text

Supplier’s button

On the inventory items you will need to select the various suppliers where you purchase this item from.



In this area we cater for multiple suppliers to one inventory item. This is handy so you can see what the cost price is that you purchase this item from the various suppliers. You will also be able to see the supplier item code and when the last time any changes done to this supplier was made.

Last Updated field is changed in two ways:

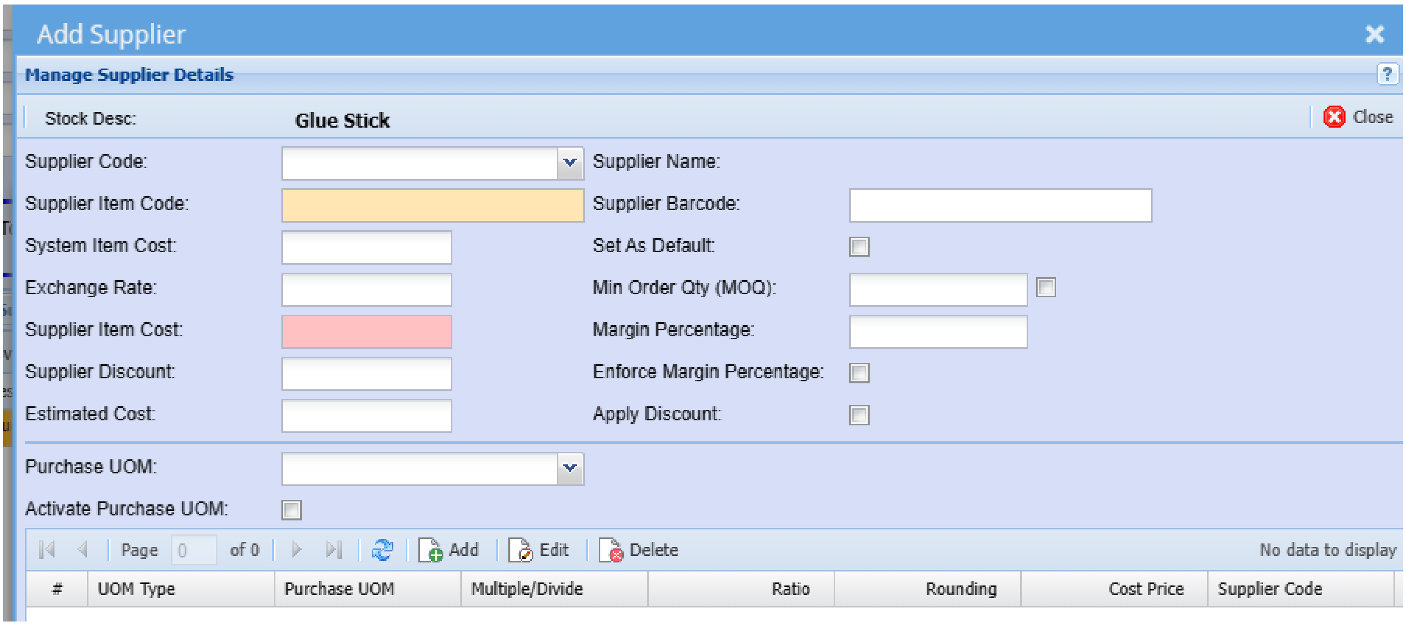
1	When a Goods Received Note comes in and updates the price and date
2	When the user manually changes the details.

Note: This price has nothing to do with the cost price of the item, these prices have to do with the actual supplier price which he will give the item to you at.

To create a new supplier, click on the Add button

Fill in the Supplier item code, select the unit of measure and put in the price of the item that your supplier will sell it to you at.

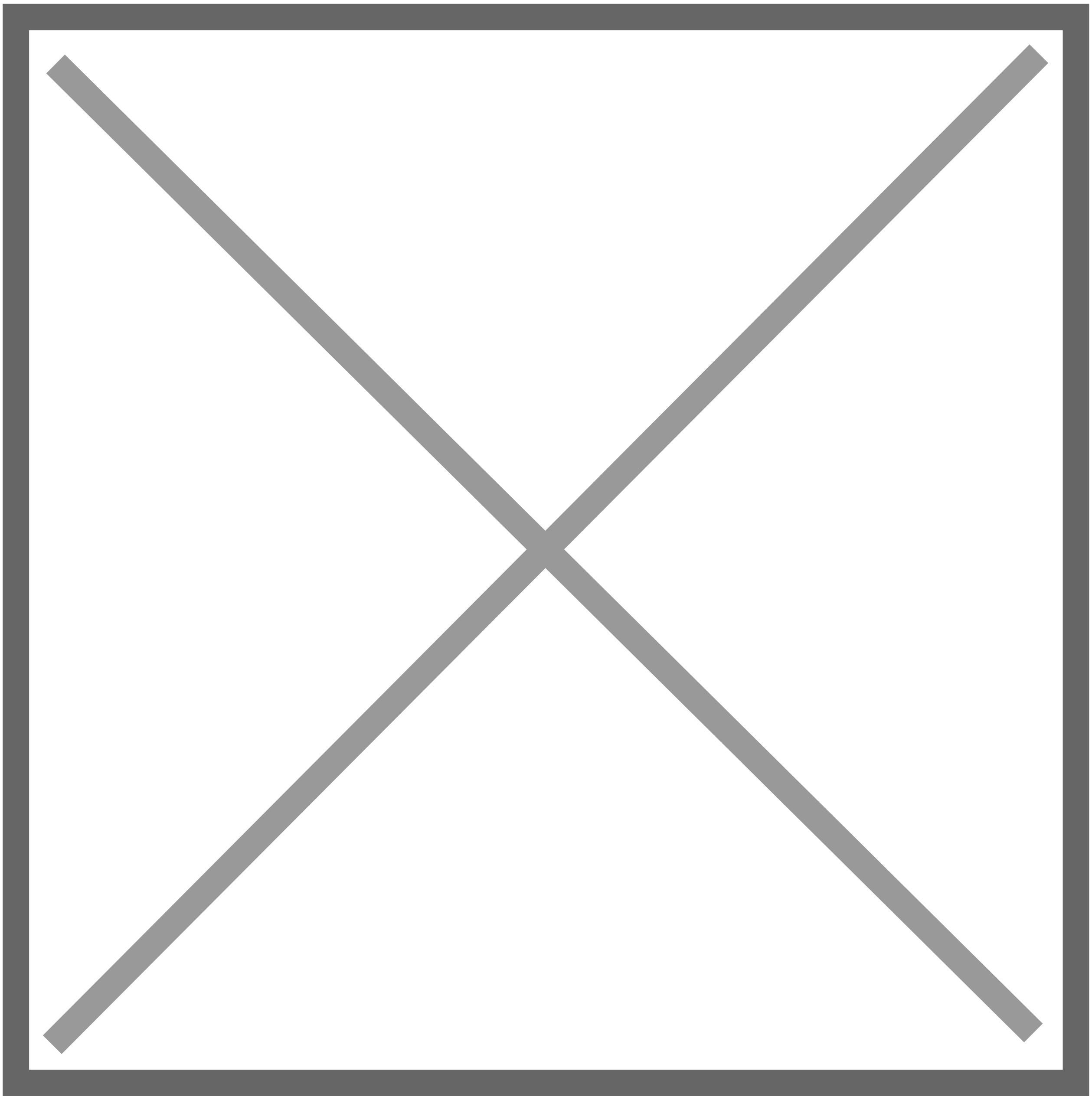
Note: Prices are exclusive.



Warehouses button

If you have the Multi warehouse Module you will be able to associate multiple warehouses to this item.

Shows the warehouses associated with that Inventory Item



This is where warehouse suppliers are created and various values are managed.

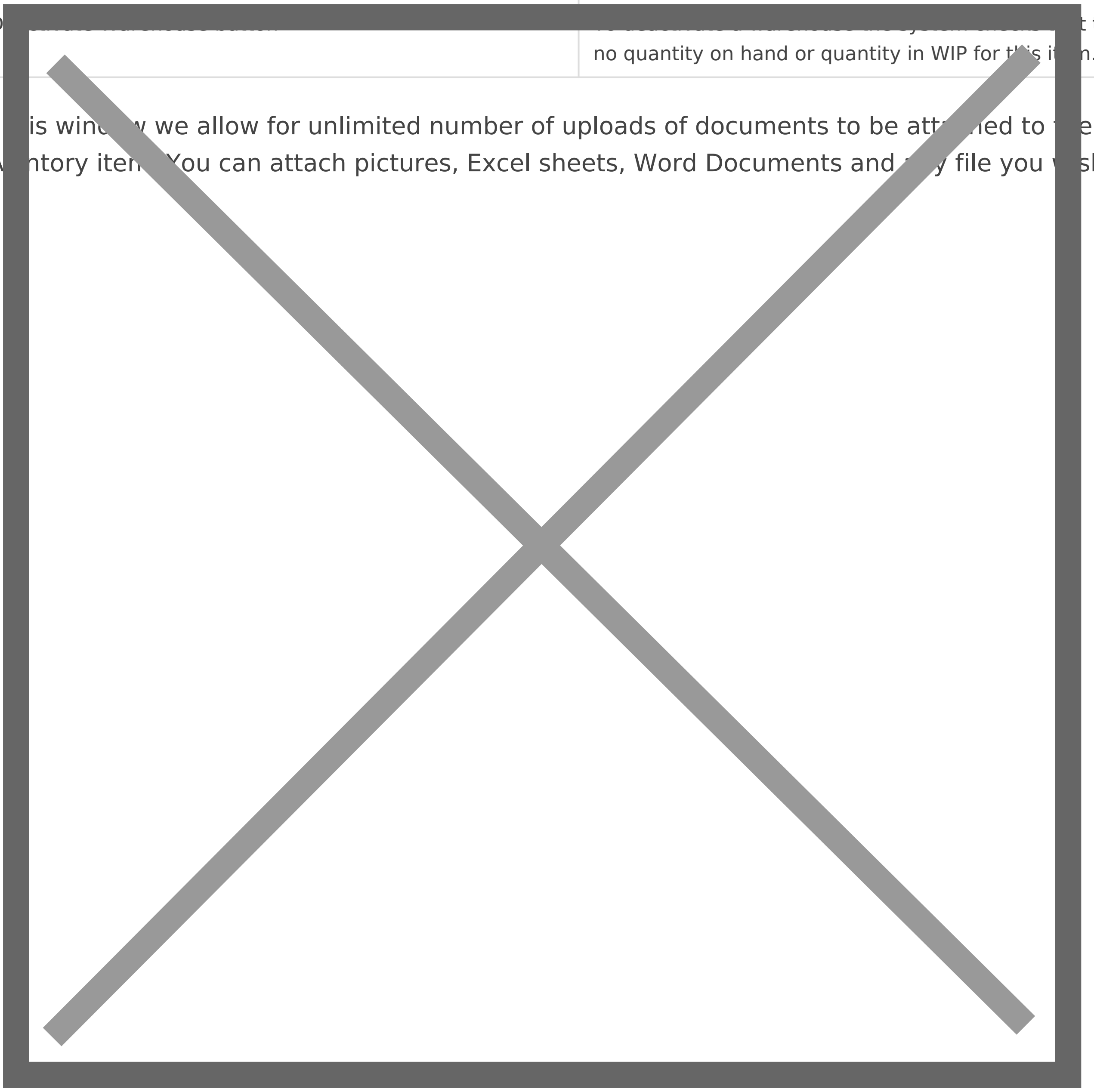
The grid will display all warehouses associated with this stock item.

The columns, Bin Location, Min Qty., Max Qty., Preferred Qty. and Reorder Qty. can be edited on the grid.

Definition of Active or Inactive Warehouse	Active or Inactive warehouse means that this warehouse which is associated with the selected stock item can be either activated or deactivated. When deactivated the warehouse will still exist for all other stock items associate it but will be inactive for this stock item.
Show Inactive tick box	Placing a tick in this box will display all inactive warehouses, removing the tick will display all active warehouses associated with this stock item

Add button	to insert a new warehouse supplier.
Remove button	removes the currently selected warehouse supplier.
Activate Warehouse button	To activate a warehouse the system check that the warehouse is an active warehouse in Warehouse Setup.
Deactivate Warehouse button	To deactivate a warehouse the system checks that there is no quantity on hand or quantity in WIP for this item.

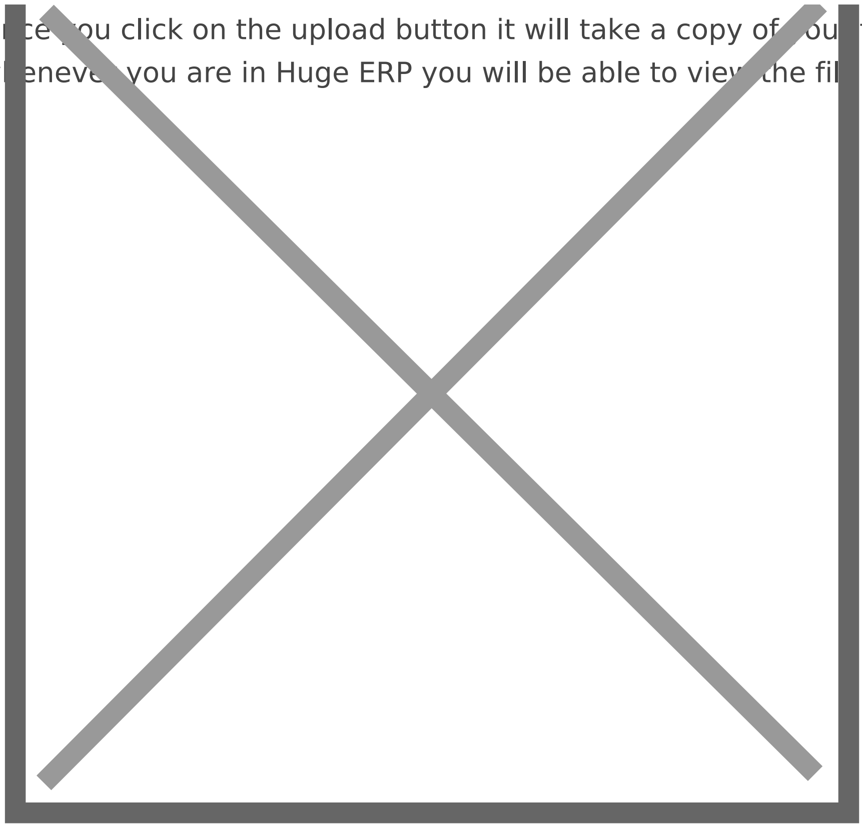
In this window we allow for unlimited number of uploads of documents to be attached to the Inventory item. You can attach pictures, Excel sheets, Word Documents and any file you wish.



When you click on the Upload button Attachments Button the following will come up.

In this area we allow you to categorize your documents, name the file and then chose the file.

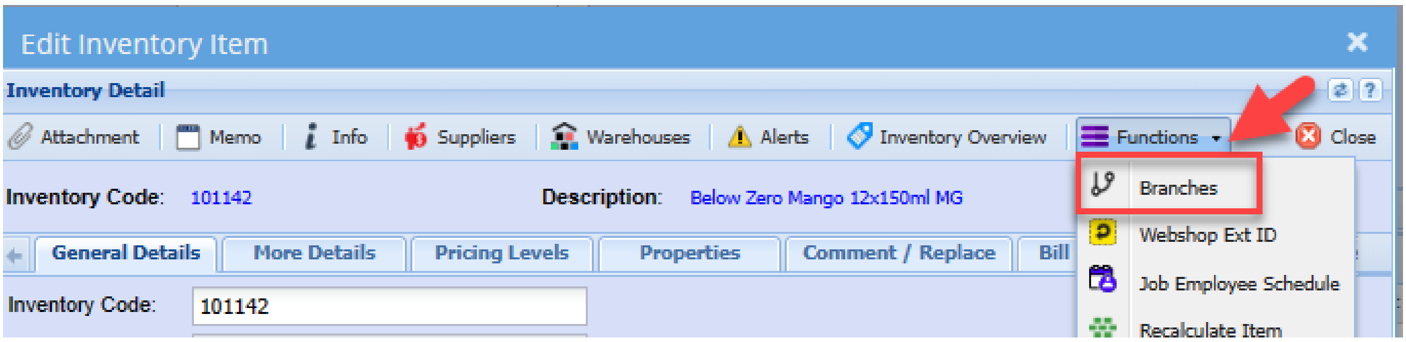
Once you click on the upload button it will take a copy of your file to the server. This means whenever you are in Huge ERP you will be able to view the file anywhere



Branches button

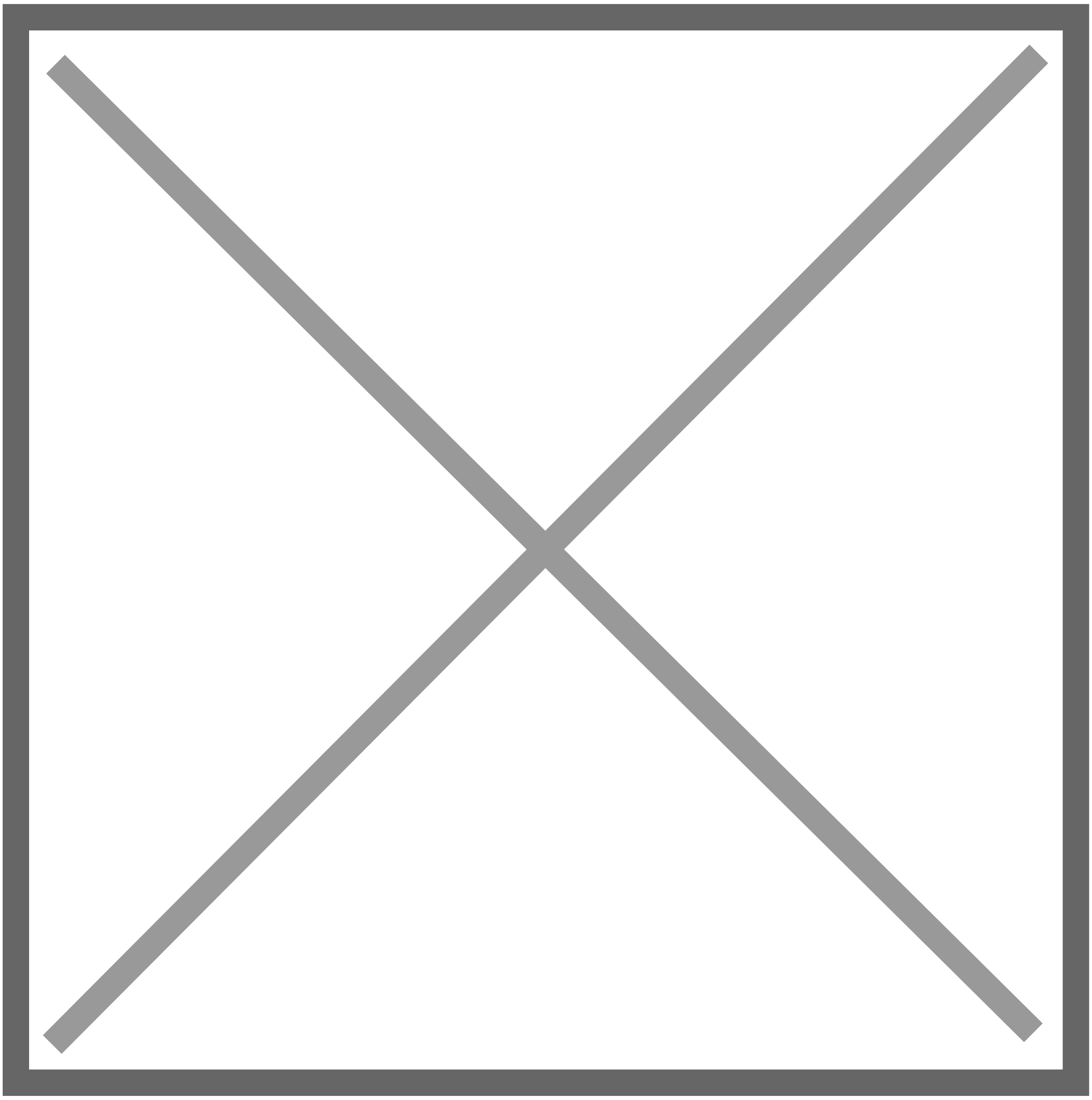
You are able to allocate an inventory code to a branch.

Click on the Functions drop down and select Branches



Double click the required branch or click once on the Branch in the left grid.

then click the Add Branch button, to move the branch to the selected grid on the right.

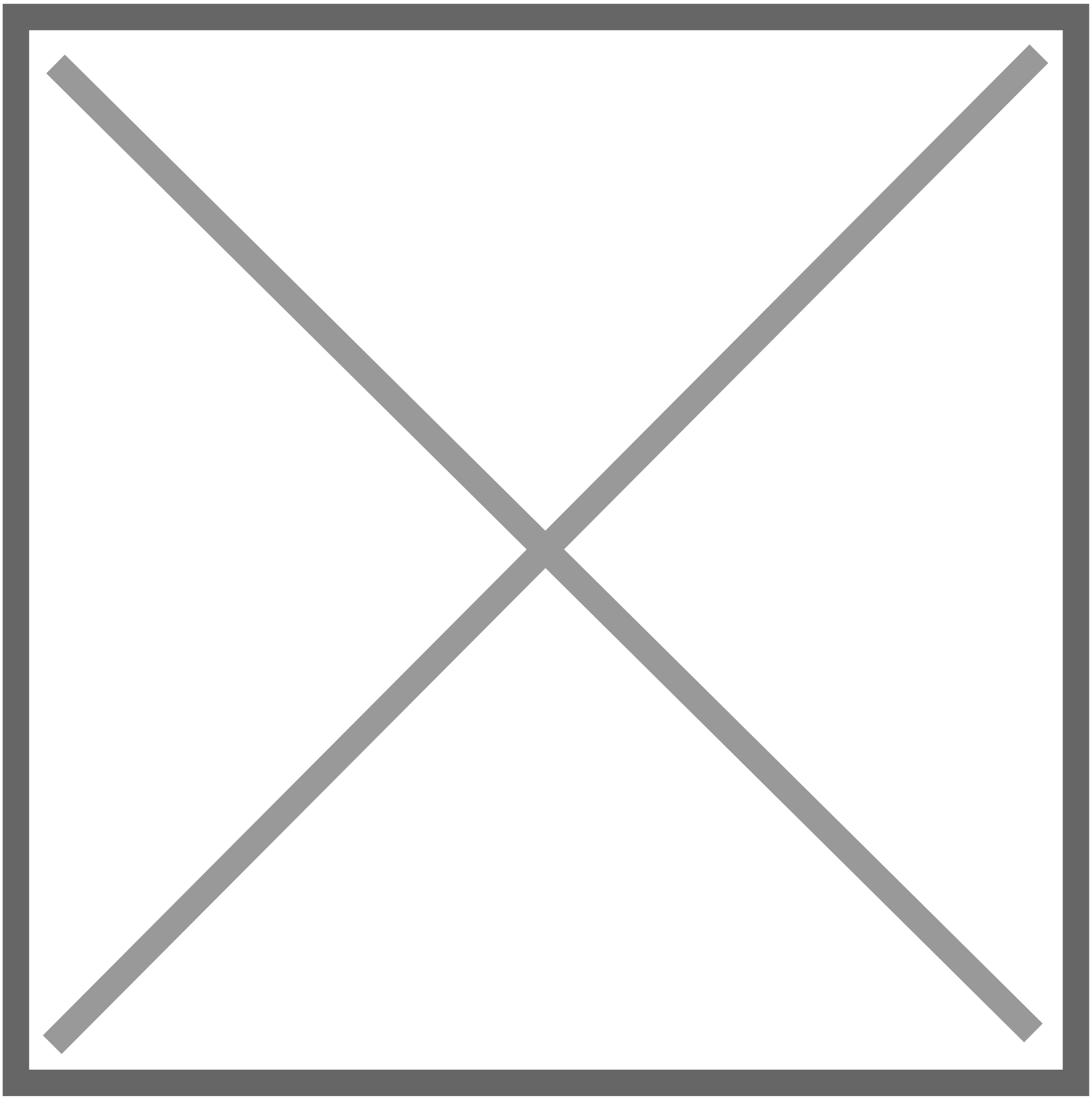


Should you be running multi-branch you can select the branch that these items are linked to.

When searching inventory items, the system will then look at the logged in user's branch access and only items that are associated to the users branch access will be returned.

Warehouse button

Shows the warehouses associated with that Inventory Item



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