

# Stock Management

## Add Stock Item - Basic Setup

To create a new inventory item, go to:

Inventory Module> Configuration> Inventory setup

Click Add

Inventory Module

Configuration

Inventory Setup

Group Codes Setup

Category Setup

Brand Make Model Setup

Units of Measure Setup

Item Grouping

Inventory Setup

Search

Add

Edit

Clone

Delete

Inventory Overview

View Image

Serial No. Options

Functions

Basic Search

Custom Search

Expand

Item Code:

Barcode:

Group Code:

Order By:

Active:

Item Description:

Supplier Item Code:

Supplier Name:

Category:

BOM Items:

Serialised Items:

Total Stock

Total Custom

Total Service

Fixed Assets

Total BOM

Main

Cost Price

Supplier Cost Price

Stock Available

Serial Numbers

Page 0 of 0

Remove Paging:

| # | Att | Memo | Status | Code | Description | Qty On Hand | Category | Supplier |
|---|-----|------|--------|------|-------------|-------------|----------|----------|
|---|-----|------|--------|------|-------------|-------------|----------|----------|

After clicking Add you will see the screen below:

Add Inventory Item

Inventory Detail

Attachment
Memo
Info
Suppliers
Warehouses
Alerts
Inventory Overview
Functions
Close

Inventory Code:
Description:

General Details
More Details
Extra Details
Pricing Levels
Properties
Comment / Replace
Custom Field

Inventory Code:
Category:
Description:
Long Description:
Group Code:
Stock Category:
Priority Level:
Bar Code:
Version Number:
Active:
Sync To Mobile:
Sync to WebShop:
WebShop Qty:
Seasonal:
Hide From Purchase:
Hide from Sale:
Slow Mover:
Primary Image:
Thumbnail Image:
Label:

Save & New
Save & Close
Save
Close
Recalculate Item

If your codes consist of only numbers, it is not advisable to start the code with a zero. This will create complications when doing bulk updates and exporting the item master into excel, where the "0" will be dropped. When you upload the updated import file, it can potentially result in a duplicate item being created.

|      |                                                                            |
|------|----------------------------------------------------------------------------|
| Code | Enter a code for the item; codes can be alpha or numeric or a combination. |
|------|----------------------------------------------------------------------------|

|                         |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
|-------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Category</b>         | <p>Select the right category for the item that you are creating</p> <ol style="list-style-type: none"> <li>1. <b>Stock:</b> This is a physical tangible item</li> <li>2. <b>Custom:</b> This is an intangible item that is predominantly used for creditors purposes. e.g if you wish to run the office expenses such as telephone account through creditors, you could set up a custom item such as telephone which is mapped to the telephone expenses account in the ledger</li> <li>3. <b>Service:</b> This is an intangible stock item such as labour, delivery etc</li> <li>4. <b>Fixed Asset:</b> This is a fixed item of the company</li> </ol> |
| <b>Description</b>      | <p>Enter an Item description</p> <p>By default, description is what is displayed on the documents</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
| <b>Long Description</b> | <p>Allows you to enter additional item description detail</p> <p>Unless you have customized stationery, the long description will not be displayed on the documents</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
| <b>Group Code</b>       | <p>Select the relevant group code if applicable</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |
| <b>Stock Category</b>   |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
| <b>Priority Level</b>   | <p>If there are items that are vital for production or fast-moving items, you can use the priority level field</p> <p>This can be used in stock procurement, forecasting and even automated exception reports to notify the procurement department of items with low stock levels. Refer to advanced item setup</p>                                                                                                                                                                                                                                                                                                                                     |
| <b>Sync To Mobile</b>   | <p>Tick the box sync to Mobile. This will allow the item to be added to the mobile application</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |

Edit Inventory Item

×

Inventory Detail

Attachment

Memo

Info

Suppliers

Warehouses

Alerts

Inventory Overview

Functions

Close

Inventory Code: 22-01/3220931

Description: Bend 80mm Grey Friars 90deg test

General Details

More Details

Extra Details

Pricing Levels

Properties

Comment / Replace

Custom Field

Inventory Code: 22-01/3220931

Category: Stock

Description: Bend 80mm Grey Friars 90deg test

Long Description: Bend 80mm Grey Friars 90deg

Group Code: BB - Bends and Brackets

Stock Category: DE - Demo

Priority Level: A - Priority Stock Item

Bar Code: 1234567 7  Print

Version Number:  Active: ☒

Sync To Mobile: ☒ Hide From Purchase: ☐

Sync to WebShop: ☐ Hide from Sale: ☐

WebShop Qty:

Seasonal: ☐ Slow Mover: ☐

Primary Image: Bend 80mm Grey Friars 90deg1

Thumbnail Image: Bend 80mm Grey Friars 90deg1

Label: Heavy 5



Save & New

Save & Close

Save

Close

Recalculate Item

Click Save

## Item Cost Price - Pop up window

Item Cost Price

 

Enter stock item cost price.

Cost Price: 50

Supplier Code: MAD SOUND EQUIPMENT

Supplier Item Code:

Pricing Level Type: ☒ Amount ☐ Percentage

Amount: 85 70

Tax Type: 01 Invoice VAT

Price Ex Vat: R 85

Tax: R 12.75

Price Incl: R 97.75

Continue

Close

|                           |                                                                                                                                                                |
|---------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Cost Price</b>         | Enter the Item cost price<br>NB: 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 |
| <b>Supplier Code</b>      | Select the default supplier                                                                                                                                    |
| <b>Pricing Level Type</b> | Select the pricing type<br>Enter either the mark-up percentage or the selling price amount                                                                     |

Once you click the save button, the additional tabs will be activated, this is where you can add more detail if needed.

**Inventory Detail**

Attachment Memo Info Suppliers Warehouses Alerts Inventory Overview Function

Inventory Code: 02-01/3220931 Description: Bend 80mm Grey Friars 90deg test

General Details More Details Pricing Levels Properties Comment / Replace Bill of Material

Inventory Code: 02-01/3220931

Category: Stock

## Attachments

Should you wish to add an image of the item or any other details or spec sheets relating to the product, you can add them as attachments

**Inventory Detail**

Attachment Memo Info Suppliers Warehouses Alerts

Inventory Code: 22-01/3220931 Description: Bend 80mm Grey Friars 90deg test

General Details More Details Pricing Levels Properties

Inventory Code: 22-01/3220931

Category: Stock

Description: Bend 80mm Grey Friars 90deg test

Long Description: Bend 80mm Grey Friars 90deg

To add an image view this manual - [Attachment](#)

**Attachments / Links**

**Attachments**      **Linkit**

| # | Name            | Description                  |
|---|-----------------|------------------------------|
| 1 | Bend 80mm Gr... | Bend 80mm Grey Friars 90deg1 |
| 2 | Bend 80mm Gr... | Bend 80mm Grey Friars 90deg  |

Click Close

Go back to the General Details Tab, select the attachment name from the drop-down on the primary image field as the image to be displayed

Click Save

|                                                     |                                              |                                                                            |
|-----------------------------------------------------|----------------------------------------------|----------------------------------------------------------------------------|
| Sync To Mobile: <input checked="" type="checkbox"/> | Hide From Purchase: <input type="checkbox"/> | Primary Image: <input type="text" value="Bend 80mm Grey Friars 90deg1"/>   |
| Sync to WebShop: <input type="checkbox"/>           | Hide from Sale: <input type="checkbox"/>     | Thumbnail Image: <input type="text" value="Bend 80mm Grey Friars 90deg1"/> |
| {UpdtWebShopStocLevel                               | Seasonal: <input type="checkbox"/>           | Slow Mover: <input type="checkbox"/>                                       |
|                                                     |                                              | Label: <input type="text" value="Heavy"/> 5                                |

This will be displayed in the image window

**Inventory Detail**

Inventory Code: 22-01/3220931      Description: Bend 80mm Grey Friars 90deg test

|                     |                                                                  |
|---------------------|------------------------------------------------------------------|
| Inventory Code:     | 22-01/3220931                                                    |
| Category:           | Stock                                                            |
| Description:        | Bend 80mm Grey Friars 90deg test                                 |
| Long Description:   | Bend 80mm Grey Friars 90deg                                      |
| Group Code:         | BB - Bends and Brackets                                          |
| Stock Category:     | DE - Demo                                                        |
| Priority Level:     | A - Priority Stock Item                                          |
| Bar Code:           | 1234567 7 <input type="button" value="Print"/>                   |
| Version Number:     | <input type="text"/> Active: <input checked="" type="checkbox"/> |
| Sync To Mobile:     | <input checked="" type="checkbox"/>                              |
| Hide From Purchase: | <input type="checkbox"/>                                         |

Primary Image:



This completes the basic item setup and the item can now be selected on various documents across the system

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Revision #18

Created 12 August 2024 03:06:01 by Pamela

Updated 21 April 2026 10:01:06 by Paige