# Adding Inventory Records

Stores get new merchandise all the time, but these items don't always make it to the inventory database automatically.

For all the system applications to work together, it's important to create one central record for each item.

This enables tracking changes to inventory through point-of-sale, purchasing, receiving, and physical inventory.

In this course, we describe inventory maintenance and show how to add items.

We also describe the use of various codes assigned to items including those that show which items sell the fastest and codes that help manage the suggested ordering process.

## Objectives

- Inventory Maintenance
- Enter New Items
- Codes Tab

## Inventory Maintenance

Open Inventory Maintenance from the browser menu or type IMU in the launch bar, then press Enter.

The Inventory Maintenance screen has a header section and a detail section.

Typically, you'll find master data for multi-store users entered in the header area and store specific data entered in the detail section. However, some master data can appear in the detail area.

The system shows whether the field is master data or store-specific data when you put the cursor over the field in question.

When changing Master data, it's changed for every store within your system.

If the field is store-specific, the system changes only the field for that store.

In the detail section, there are multiple separate and distinct tabs.

They include tabs for Stocking, Pricing, Codes, History, Notes, Vendor, Load, Misc, Custom Fields, and Analytics.

Add new items with the Load and Stocking tab.

As with all system applications, the icons in the Ribbon menu control the major processes available in the Inventory module.

The system groups them together based on function such as Maintain, Navigate, Lookup, etc.

## Enter New Items

In Inventory Maintenance, begin the process of entering new items in the system by selecting the Load tab.

A best practice is to enter new SKUs created in IMU from this tab.

The system requires this information at a minimum:

- SKU or item number

- department,
- and description.

If you have a multi-store system, the In Stores field must list the stores that will stock this SKU.

It’s important to check the stores’ configurations because the system can optionally auto-assign a SKU if it’s left blank.

Enter other relevant information in the header area including manufacturer part number, class and/or fineline, and primary vendor.

It’s better to enter more information in the header because you’ll be able to use that data to group and view items using inventory viewers, reports, or Compass Analytics Queries.

A best practice is to limit the number of employees who have the security options to add new items and to require the completion of all key fields with each new SKU entry.

The quality of your data is dependent on accuracy and consistency.

First, enter the SKU and type a Description.

If you use Manufacturer part numbers, type that here.

Next is the UPC or Universal Product Code, otherwise known as a barcode.

If the SKU has a UPC associated with it, select the blue hyperlink UPC to enter the code.

Keep in mind, without a UPC code entered, clerks cannot scan the item at point-of-sale.

The Maintain UPC codes screen displays.

With the cursor in the New UPC field, type or scan the UPC.

You may also assign an optional Primary UPC to an item.

This shows the UPC that will print on Windows Labels and RF labels, display in Inventory Maintenance and the Inventory Viewer, and print on invoices.

If you don't assign a primary UPC, the last UPC used at POS will print or display in the above situations.

Press F4 to add it, and then close the Maintain UPC codes window. Enter more information as necessary.

Again, if you have a multi-store system, make sure to add items to the correct store(s).

Department is a mandatory field. Use the drop-down to select the correct department for this SKU, then tab to the next field.

Class and fineline are not required fields, however they do enable dividing the department into sub-categories for better sales and inventory analysis.

Finally, select the primary and manufacturing vendors.

The more information you fill out in the header, the easier it will be to track and report in the future.

Remember, be accurate and consistent.

Again, if you have a multi-store system, make sure to add items to the correct store(s).

In the detail section of the Load tab, enter the selling price in the Retail field and the cost in the Replacement Cost field.

When entering a cost and leaving the retail field blank, the system calculates a new retail price based on the value in the desired gross profit field.

With this field left blank also, the system uses the desired gross profit associated with the department in the calculation instead.

Add the item to the inventory file.

If added correctly, the system displays a Record(s) added message on the bottom of the screen.

If NOT added correctly, the system displays a message noting what to correct.

The system also enables adding new items from the Stocking tab.

This is typically where you add lumber or L-type items.

L type items differ from H type items.

A business buys an L-type item in one unit of measure such as thousand-board-feet and sells the item by another unit of measure such as by-the-piece.

The system performs a calculation, a Purchasing Conversion Factor, which converts the item from its buying unit to its selling unit of measure.

For more information on this topic, refer to the Training on Demand course Loading Lumber Items, or online help.

Although the header area is identical to the Load tab, the detail area has fields unique to the Stocking tab.

Many of these fields track the dates of various activities in the system.

Each field has a hyperlink available to supply the detail that created the given date.

You do not normally enter data here as we want the system to populate the fields as each event occurs.

Note that pricing and costing is not available on the Stocking tab.

Enter that information on the Load or Pricing tab, after adding the item.

## Codes Tab

The system pulls the fields on the Load tab together from other tabs to make it easier to add new items.

As you become familiar with adding new items, explore each of these tabs to decide what other information to keep for the products you stock.

Pay particular attention to the Codes tab.

There are many different types of codes available for assigning to an item.

These may include Popularity Codes that show which items are selling fastest to Seasonal Sales codes that help manage suggested ordering processes.

The value of these codes lies in the system's ability to use them to include or exclude items from a report or analysis.

Remember, the key to getting the most use from the data in your inventory file and from these codes is accuracy and consistency.

It's possible to overlook some important codes. Find them by selecting the Additional Codes link.

The first one, Decimal Quantity Allowed, determines if you sell the item in fractions at Point of Sale.

For example, if you sell ribbon or chain by the foot and want to be able to sell ½ foot, then set this flag to Yes. You can also let the system control it by the defaults set in Options Configuration.

The POS No Charge SKU flag tells whether you can sell items for no charge at point-of-sale.

When set to yes, the item posts at 0.00 and **No Charge** prints on the receipt.

For items only available through special order, use the Special Order SKU flag to mark it.

Employees looking at this record will know it's not normally stocked in your inventory.

These Items are Flagged on Purchase Orders and update the Vendor Special Purchase History.

The next flag, Sellable in this Store, tells whether you can sell an item in a particular store or location.

This can be helpful in a multi-store environment because it is a store specific field.

Use the Gift Card SKU flag when setting up a SKU for Gift Cards.

Setting this Flag to Yes activates a Gift Card when it's sold at Point of Sale.

The system enables setting a Fixed Price Indicator on products.  With this code left blank, the item follows the Customer Pricing Level at Point of Sale.

Otherwise, you can set the value to always sell this item at a particular price.

When enabled, this flag always overrides Customer Pricing at point-of-sale.

The only exception is if the item is on a contract in Category Pricing Plans and the customer has that Category plan.

The Fee Type code shows whether an Item has an associated Environmental Fee or an Excise Tax.

With enhanced forms enabled on the system, it can print the total excise tax fees at the bottom of the invoice.

Finally, you can use the Hazardous Code flag to show a Hazardous item.

You can use one of the many default codes in the drop-down menu, but you can also set up your own.

The code decides acceptable shipping methods via air, ground, rail, or ship.

## Recap

Creating a central record for each inventory item enables system applications to work together seamlessly and allows tracking changes to inventory through point-of-sale, purchasing, receiving, and physical inventory.

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