Adding and Maintaining Products

Your items or products are the building blocks of successful inventory management. Accurate data is critical for reporting and purchasing.

In this course, we show you how to add and maintain products.

Objectives

- Adding a Product
- Maintaining Products

Adding a Product

A product is an item or service that has a specific identifier, price, cost, and unit of measurement.
To add a standard product, select **Products** and then tap **Products** in the sub-menu.

If your default view is **Form View**, tap the Add button to add a product.
Or select the **Table View** icon and tap *this* Add button to add a product.

In either case, the **Add New Product** screen displays.

Enter the details in the **Product Information** section. Fields denoted with a red asterisk are mandatory.
Choose the **Standard** *product type* from the drop-down menu and select the *store* that will stock and sell the product.
Enter the unique SKU and give it a good description.
Choose the category that the product belongs in from the drop-down menu.
Set the product's price by choosing an option form the drop-down menu.
You can have the price to be same for all stores, different, or even allow the price to be entered at point of sale.
Enter the selling price, and the *current* cost to replace the product from the main supplier.
Enter your desired gross profit percentage.
Select a supplier from the drop-down menu.
This will be your main supplier for *this* product at the current cost.
Enter the universal product code so the item can be scanned.
Choose the selling unit of measure.
For example, choose EA if you want to sell the product as a single unit or piece. You might use PK if you want to sell the product in packs.
The Purchase UOM determines the unit of measurement the supplier requires when purchasing the product from them.
Enter the minimum quantity sold by the supplier. The Order Multiple identifies how many of the Selling UOM are in the Purchasing UOM.
For example, if you enter 12, the product comes in multiples of 12 EA, or 1 PK, from the supplier.
Order points will be reviewed during the Suggested Ordering agenda.
Enter the manufacturer part number and any related tags.

Tap **SHOW** to configure the product’s inventory and selling behavior.

Use the toggles to track the product inventory quantities, allow discounts on the product, or allow customers to return the product to the store.
Activate *this* toggle if the product is taxable.
To capture additional information at POS, activate *this* toggle.
For selling the product at selected stores, activate the *POS Sellable* toggle.
Enter the location where the product will be placed in your store.
Determine if fractional quantities are sold at POS, when purchasing an item from a supplier, or both.
You can set fractions up to two decimal places.
Select the season code if any from the drop-down menu.
Choose the *tax code* for taxable purposes.
Select an option from the drop-down if you plan to track serial numbers for this SKU.
Related items are products that are usually sold with the parent product.
Review the Help documentation for details on setting up related items.

Tap **SHOW** to configure the product's specifications.
This section captures the weight, height, width, length, and cube of the item along with its unit of measure.
Finally, tap **Save & Edit**.
You can also select **Save & Add More** to save this product and add another.

Maintaining Products

Updating products based on customer preferences, sales history and supplier availability is necessary for higher-profit margins and just-in-time inventory practices.

From the *main menu*, select **Products > Products**.
Use the *search field* to search for a specific product or select **Table View** to view all products.
There are many filters here to limit the results.

Columns can be added or deleted.
Tap the three dots and hover over Columns.
Check the columns you want and tap **Actions > Save View.**
Give your view a name and tap **Save**.
Now, this grid is available from Open Views. Tap **Actions > Open Views**. Select your view and tap **Open**.

Check the box next to a product or check *this* box to select all products.
Tap **Export** if you want to export the product details to an Excel file.
Tap **Edit** to update the details.

You can scroll through products using the *forward* and *backward* buttons if you've selected more than one product to edit.
Select the tabs you want to update, make the necessary changes, and then select **Save**.

The **GENERAL** tab shows the details of the product you defined when adding the product.
You can see the products and their specifications *here*.
These blue links allow you to edit information.

Activate the **Discontinued** toggle if you are not selling this product anymore.
Enter additional information about the product *here*.

To add an image for this product, tap **Actions > Manage Images.**

To change the products' SKU, tap **Actions > Change Item Number.**
Enter the new unique item number and then tap **Save**.

Tap **Show** against *Prices & Costs* and *Inventory & Selling Behavior* to view and update their details.

In the **Notes** section, you can add, edit and delete a note.

The **Buying** tab shows the products' supplier detail.
Select the store from the **Store Information** drop-down menu to view or update store details.
You can add or delete a product supplier and indicate which one is the primary one.
If you have multiple suppliers, choose the supplier from the drop-down menu that you want to edit.
Tap *here* to add an alternate purchasing unit for the selected supplier.
Enter the required information and then tap **ADD**.

The **Stock & Sell** tab shows the stocking and selling details of the product supplier.
Total QOH determines the total units of a product in a store.
Available QOH displays the available units of products in a store.
Qty on Order is the product's quantity on purchase orders you haven't received yet.
This displays the product's quantity that is committed for sale.
Tap the **Total QOH** link to view the quantity change log.
Set up the location code to easily stock, find, and count merchandise.
Set the inventory and selling behavior, tax code, and label type *here*.

The **Prices & Cost** tab has three sections.
Edit the products' pricing details in the **Prices** section.
Tap *this* link to view the retail price change log of the product.
Use the **View Special Pricing** link to view any price book details that provide special pricing.
Tap the **Add** button to add an alternate price for the product.
Fill the fields and tap **OK**.
All of the data here is updated through the purchasing, receiving, and physical inventory processes.

The **History** tab displays the sales and purchasing history of the product.
Select the store from the drop-down menu to view its information.
Select either THIS WEEK, THIS MONTH, or THIS YEAR to view the specific details in the table alongside the totals.
Tap **Export** to export the information to an Excel file.

Don't forget to click **Save** at the end.

You can delete products that are not in stock and are not committed for sale.
In the edit screen, tap **Actions** > **Delete Product**.
Select **Yes** in the confirmation prompt to delete the product.

You can also delete a product from a selected store if you don't want to delete it from other stores.
The **Store Information** field in each tab displays the selected store.
Tap **Actions** > **Delete from Selected Store**.
Select **Yes** in the confirmation prompt to delete the product from this store.
Finally, tap **Save**.

Recap

Product maintenance is a crucial for supply chain management. For more information on inventory best practices, refer to the help articles, videos, and guided learning.
In this course, we showed how to add and maintain your products including stock management fields and pricing options.

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EPICOR

Corporate Office
804 Las Cimas Parkway
Austin, TX 78746
USA
Toll Free: +1.888.448.2636
Direct: +1.512.328.2300
Fax: +1.512.278.5590

Latin America and Caribbean
Blvd. Antonio L. Rodriguez #1882 Int. 104
Plaza Central, Col. Santa Maria
Monterrey, Nuevo Leon, CP 64650
Mexico
Phone: +52.81.1551.7100
Fax: +52.81.1551.7117

Europe, Middle East and Africa
No. 1 The Arena
Downshire Way
Bracknell, Berkshire RG12 1PU
United Kingdom
Phone: +44.1344.468468
Fax: +44.1344.468010

Asia
238A Thomson Road #23-06
Novena Square Tower A
Singapore 307684
Singapore
Phone: +65.6333.8121
Fax: +65.6333.8131

Australia and New Zealand
Suite 2 Level 8,
100 Pacific Highway
North Sydney, NSW 2060
Australia
Phone: +61.2.9927.6200
Fax: +61.2.9927.6298