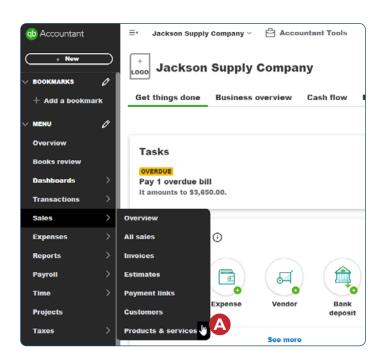
Inventory Item Maintenance

Inventory item maintenance includes adding an inventory item record, changing information for an existing inventory item, and making an inventory item's record inactive. The three maintenance tasks are covered in detail on the following pages, including *QBO* windows.

Add an Inventory Item Record – Quick Reference Table

Step	Box or Other Location	Procedure			
A	QBO Navigation Bar	Click Sales \rightarrow Products & services to open a list of products and services.			
B	New button	Click the New button in the top right portion of the Products & services window.			
C	Product/Service list	Select Inventory/Inventory item as the type of item to add, which will open a detail window for the item.			
D	Name	Enter the inventory item name and/or number.			
E	Initial quantity on hand	Type the current quantity being added, even if it is 0.			
F	As of date	Enter the date on which you are adding the item.			
G	Reorder point	Type reorder point quantity.			
•	Inventory asset account	Accept the default general ledger account or change it to the account that will be used to record purchases of the inventory item.			
0	Description	Type a description of the inventory item.			
J	Sales price/rate	Type the selling price of the inventory item.			
K	Income account	Accept the default sales general ledger account or change.			
C	Purchasing information description box	Type a description of the inventory item.			
M	Cost	Type the cost of the inventory item.			
N	Expense account	Accept the default expense account or change. This is normally a cost of sales type account.			
0	Preferred vendor	Select a vendor from the drop-down list if there is a preferred vendor for this inventory item.			
Р	Main item window	Review the information to verify that it is correct.			
Q	Save options	Save the inventory item record and close the window.			

Add an Inventory Item Record QBO windows



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My accountant			104	300		104	Inventory	31.75	23.5	Edit 🗸
Commerce >			105	125		105	Inventory	35.75	26.5	Edit 🗸
> More (0)		~~	106	224		106	Inventory	37.25	28.5	Edit ~
Menu settings										

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Add an Inventory Item Record

Product/Service information

Inventory

C

QBO windows (continued)

E P	Non-Inventory Products you buy and/or sail but don't need to (or can't) track quantities of, for example, nuts and boits used in an installation.
	Service Services that you provide to customers, for example, landscaping or tax preparation services.
(କିନ୍ଧି) 🗛	Bundle A collection of products and/or services that you sell together, for xxample, a gift basket of fruit, cheese, and wine.
Product/Service	Information
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New BETA view					
More 🗸	New 🗸				
Service					
Inventory item	Inventory item 🕛				
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Batch import	Batch import				
Import from sale	s channel				

New BETA view

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Inventory item	× Xuu an image	
SKU		í
Category	~	
Inventory	^	_
Initial quantity on hand*	As of date" What's the as of date?	ł
	MM/DD/YYYY	
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Purchase description		
	\$	
Purchase cost	Expense account*	
	30400 Cost of goods sold 🗸 🗸	J
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Select a preferred vendor	·	

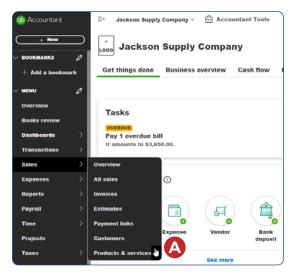
As of our latest publication date, Intuit was testing a new BETA version of these windows. All steps in the Quick Reference Table can be done with the new BETA view, although the exact descriptions and order of boxes may differ from the standard view.



Step	Box or Other Location	Procedure
A	QBO Navigation Bar	Click Sales \rightarrow Products & services to open a list of products and services.
B	Action column - Edit link	Locate the item you want to edit and click the Edit link in the Action column to open that item's detail window.
C	Main item window	Change the appropriate information in the detail window for the item.
D	Save options	Save the revised inventory item record and close the window.

Change Information in an Existing Inventory Item's Record – Quick Reference Table

Change Information in an Existing Inventory Item's Record *QBO* windows



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+ New	Sales								
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Overview	0 1 item is	s running low on stock	See all	>	c				
Books review									
Transactions >	Q Search f	for products and se	rvices Filter Y						820
Sales >		NAME T	QTY ON HAND ©	CATEGORY 0	sku	TYPE 0	PRICE 0	COST 0	ACTION
Expenses >	0	101	43 LOW		101	Inventory	225	175	Edit ~
Payroll >		102	75		102	Inventory	150	115	Edit I 🗸
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Change Information in an Existing Inventory Item's Record

QBO windows (continued)

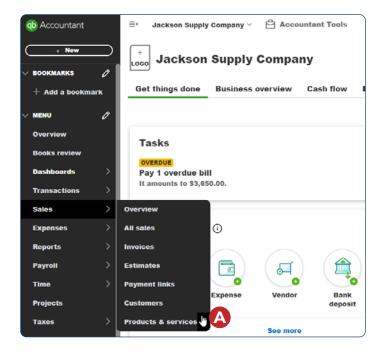
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			Quantity on purchase order	
Inventory asset account			Reorder point What's the reorder p	coint? Inventory asset account
			50	10400 Inventory
Description				
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Sales price/rate	Income account		Description Washcloths - 100 pack	
114	30100 Product Sales		Price/rate	Income account*
			114	30100 Sales
Purchasing Information			Purchasing	
Washoloths - 100 paok		1	Purchase description	
Cost	Expense account		Washcloths - 100 pack	
87	30400 Cost of Goods Sold	•	Purchase cost	Expense account*
Preferred Vendor			97	30400 Cost of goods
Select a preferred vendor			Preferred vendor Select a preferred vendor	
			Cancel	Make inac
				mane mac



Step	Box or Other Location	Procedure
A	QBO Navigation Bar	Click Sales \rightarrow Products & services to open a list of products and services.
B	Item check box	Locate the item you want to make inactive and click the check box to the left of the item.
G	Action column drop- down list button (standard view) or pop- out menu (BETA view)	Standard view: Locate the item you want to make inactive and click the Action column drop-down list button on that item's line \rightarrow Make inactive. BETA view: Click the Make inactive button.
D	QBO message	A message will appear that says "Are you sure you want to make [item name] inactive?" Click the Yes/Yes, make inactive button.

Make an Inventory Item's Record Inactive – Quick Reference Table

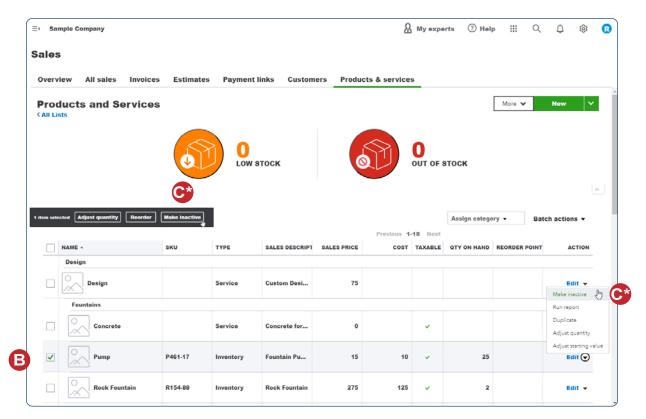
Make an Inventory Item's Record Inactive *QBO* windows





Make an Inventory Item's Record Inactive

QBO windows (continued)



* Standard view uses the Action column drop-down method; new BETA view has this menu in a different location immediately above the item names. Either way, select "Make inactive."



