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.
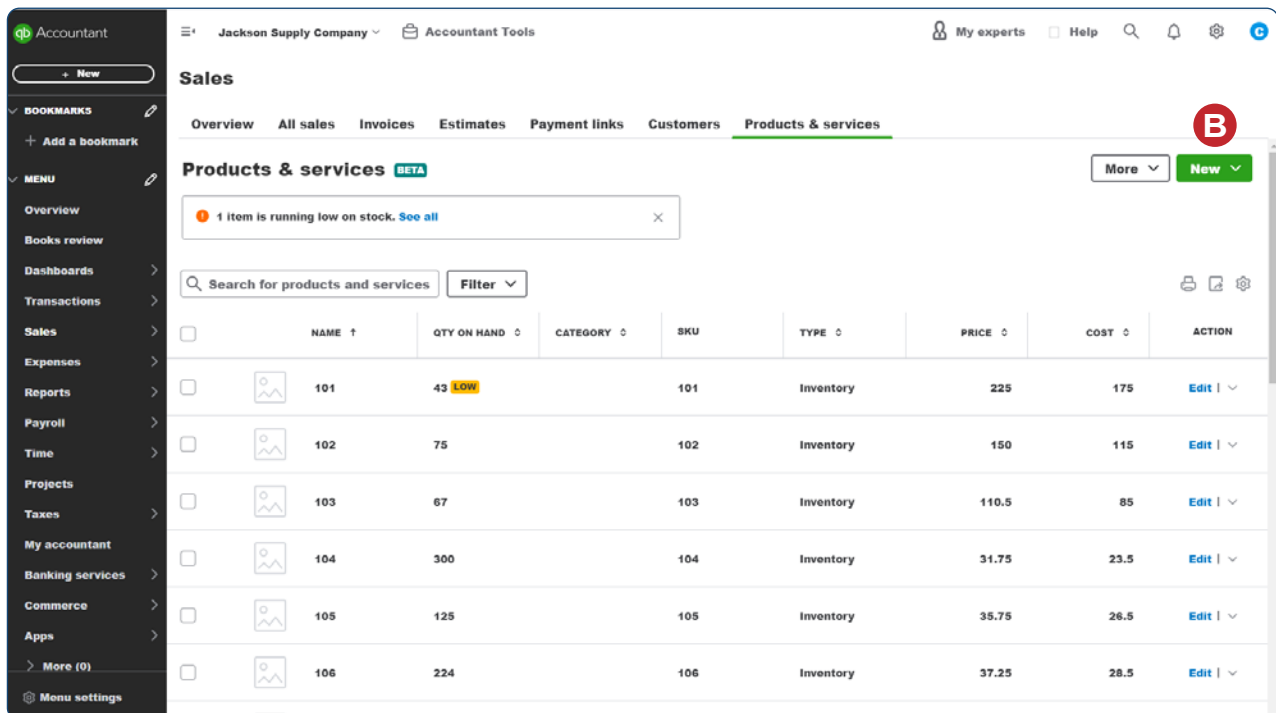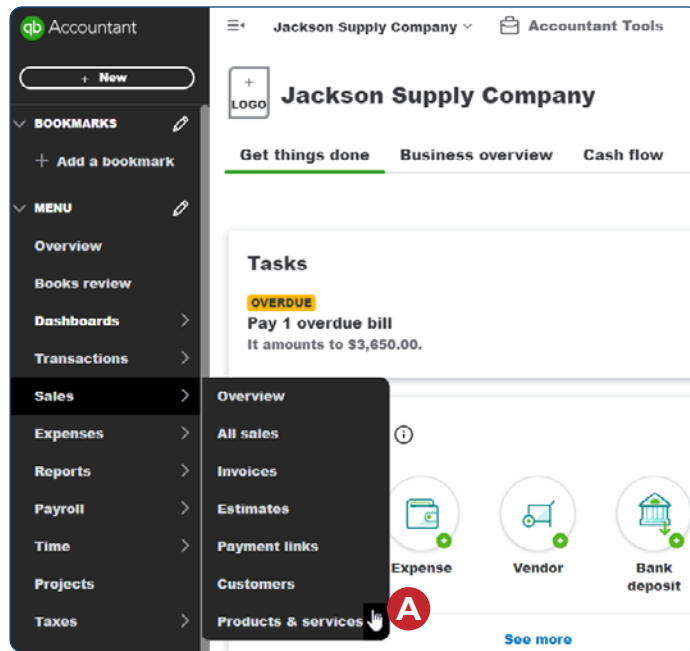
Add an Inventory Item Record – Quick Reference Table

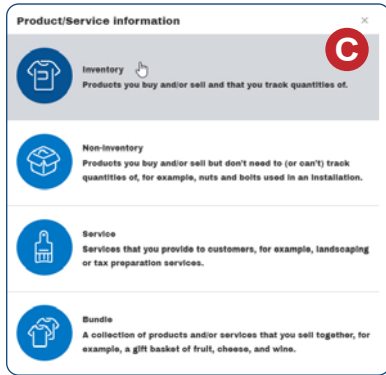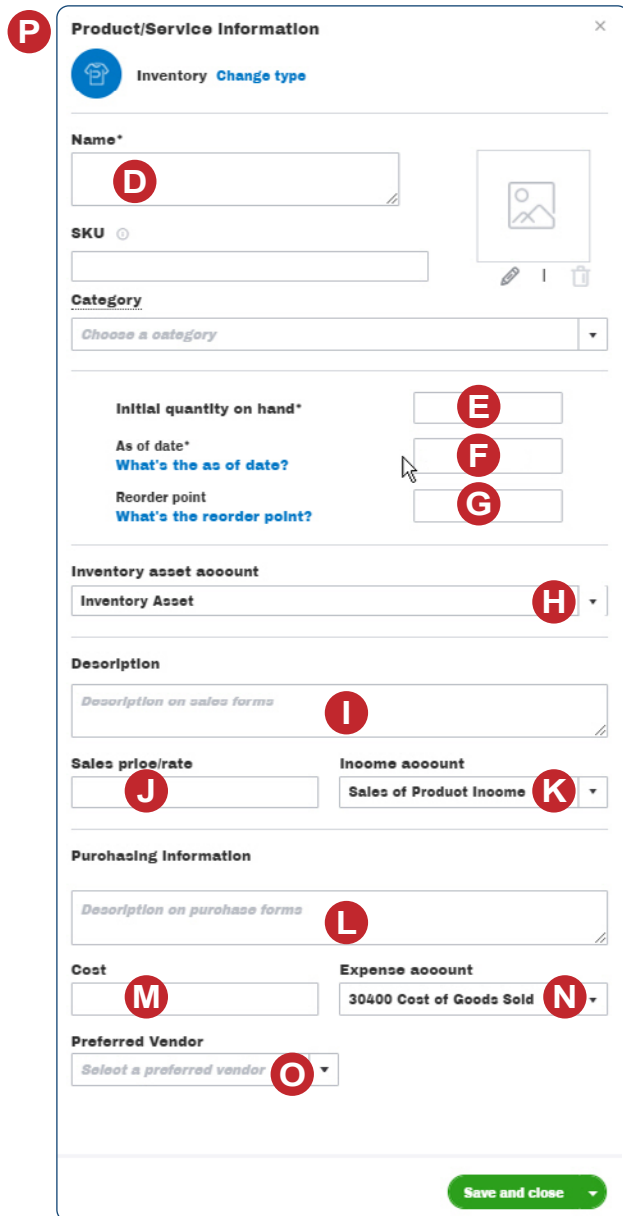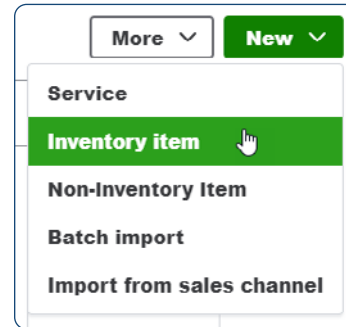| Step	Box or Other Location	Procedure
A	*QBO* Navigation Bar	Click **Sales** → **Products & services** to open a list of products and services.
B	New button	Click the **New button** in the top right portion of the **Products & services window**.
C	Product/Service list	Select **Inventory/Inventory item** 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.
H	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.
I	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.
L	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.
O	Preferred vendor	Select a vendor from the drop-down list if there is a preferred vendor for this inventory item.
P	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
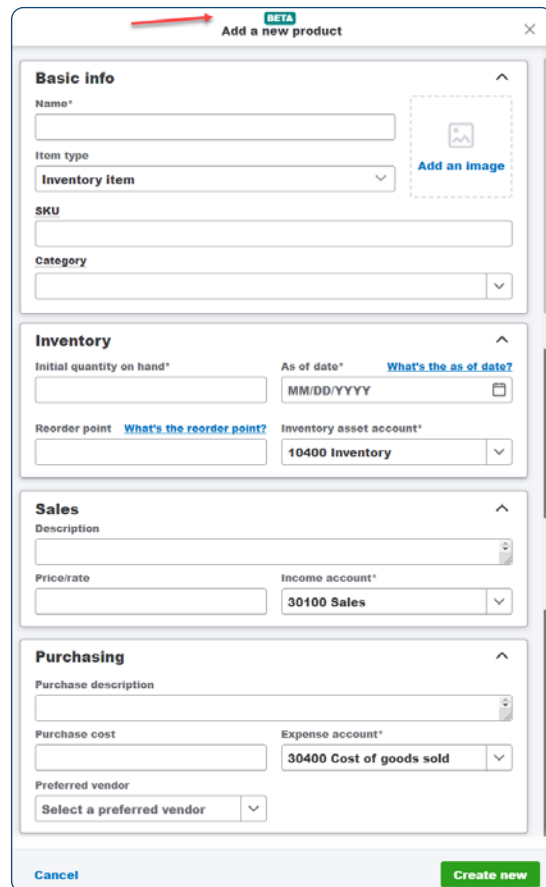### QBO windows

Add an Inventory Item Record
QBO windows *(continued)*

C — Product/Service information
- Inventory — Products you buy and/or sell and that you track quantities of.
- Non-Inventory — Products you buy and/or sell but don't need to (or can't) track quantities of, for example, nuts and bolts used in an installation.
- Service — Services that you provide to customers, for example, landscaping or tax preparation services.
- Bundle — A collection of products and/or services that you sell together, for example, a gift basket of fruit, cheese, and wine.

New BETA view

More | New
- Service
- **Inventory item**
- Non-Inventory Item
- Batch import
- Import from sales channel

New BETA view

P — Product/Service Information

Inventory Change type

Name* **D**

SKU **(info)**

Category — Choose a category

Initial quantity on hand* **E**

As of date* **F**
What's the as of date?

Reorder point **G**
What's the reorder point?

Inventory asset account — Inventory Asset **H**

Description — Description on sales forms **I**

Sales price/rate **J**

Income account — Sales of Product Income **K**

Purchasing Information — Description on purchase forms **L**

Cost **M**

Expense account — 30400 Cost of Goods Sold **N**

Preferred Vendor — Select a preferred vendor **O**

Save and close **Q**

Add a new product (BETA)

Basic info
- Name*
- Item type — Inventory item
- SKU
- Category
- Add an image

Inventory
- Initial quantity on hand*
- As of date* — MM/DD/YYYY — What's the as of date?
- Reorder point — What's the reorder point?
- Inventory asset account* — 10400 Inventory

Sales
- Description
- Price/rate
- Income account* — 30100 Sales

Purchasing
- Purchase description
- Purchase cost
- Expense account* — 30400 Cost of goods sold
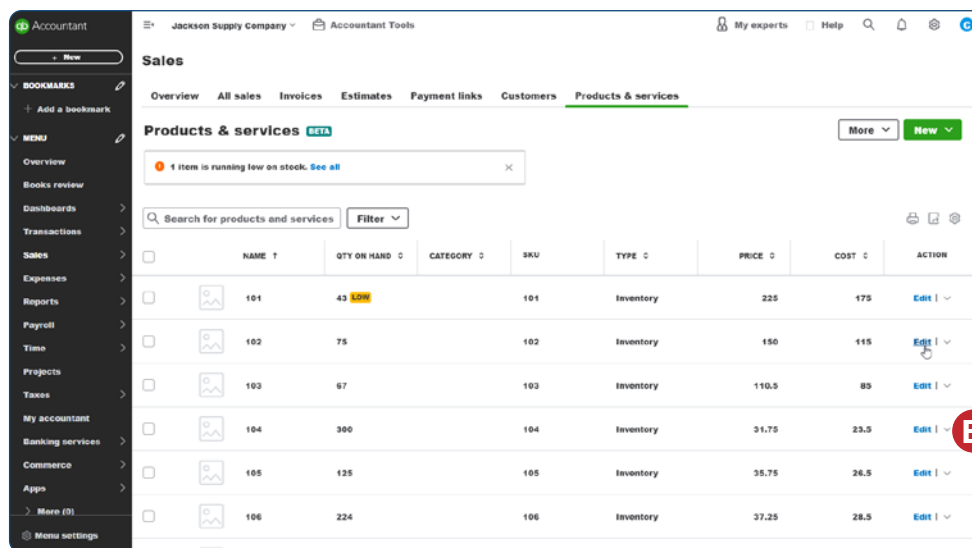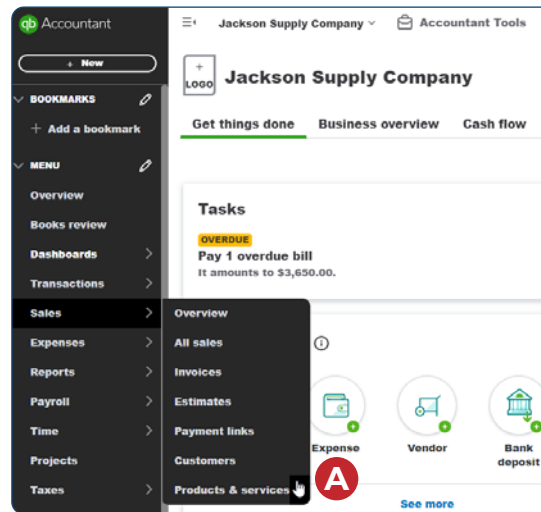- Preferred vendor — Select a preferred vendor

Cancel | Create new

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.

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

Step	Box or Other Location	Procedure
A	*QBO* Navigation Bar	Click **Sales** → **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
QBO windows

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

New BETA view

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

Step	Box or Other Location	Procedure
A	*QBO* Navigation Bar	Click **Sales → 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.
C	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 **→ 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
QBO windows
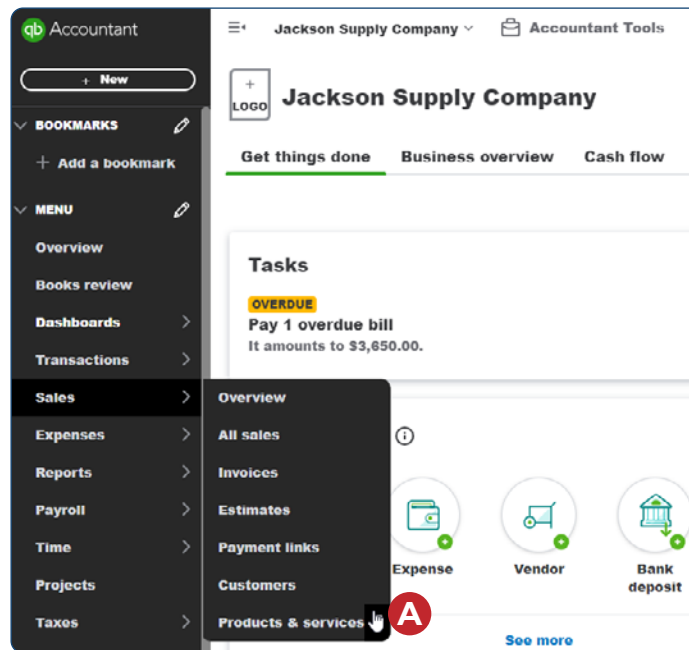
Make an Inventory Item's Record Inactive
QBO windows *(continued)*

* *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."*

May say Cancel ⟶

May say Yes, make inactive