

# 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
<b>A</b>	<b>My apps menu</b>	Click <b>Sales &amp; Get Paid</b> → <b>Products &amp; services</b> to open a list of products and services.
<b>B</b>	<b>New button</b>	Click the <b>New button</b> in the top right portion of the <b>Products &amp; services window</b> .
<b>C</b>	<b>Product/Service list</b>	Select <b>Inventory item</b> as the type of item to add, which will open a detail window for the item.
<b>D</b>	<b>Name</b>	Enter the inventory item name and/or number.
<b>E</b>	<b>Initial quantity on hand</b>	Type the current quantity being added, even if it is 0.
<b>F</b>	<b>As of date</b>	Enter the date on which you are adding the item.
<b>G</b>	<b>Reorder point</b>	Type reorder point quantity.
<b>H</b>	<b>Inventory asset account</b>	Accept the default general ledger account or change it to the account that will be used to record purchases of the inventory item.
<b>I</b>	<b>Description</b>	Type a description of the inventory item.
<b>J</b>	<b>Price/rate</b>	Type the selling price of the inventory item.
<b>K</b>	<b>Income account</b>	Accept the default sales general ledger account or change.
<b>L</b>	<b>Purchasing information description box</b>	Type a description of the inventory item.
<b>M</b>	<b>Purchase cost</b>	Type the cost of the inventory item.
<b>N</b>	<b>Expense account</b>	Accept the default expense account or change. This is normally a cost of sales type account.
<b>O</b>	<b>Preferred vendor</b>	Select a vendor from the drop-down list if there is a preferred vendor for this inventory item.
<b>P</b>	<b>Main item window</b>	Review the information to verify that it is correct.
<b>Q</b>	<b>Save options</b>	Save the inventory item record and close the window.



## Add an Inventory Item Record

### QBO windows

**Products & services** Give feedback More New

**Low stock**  
1 item is running low on stock. [See all](#)

Search by name, SKU or categ Filter Print Refresh Settings

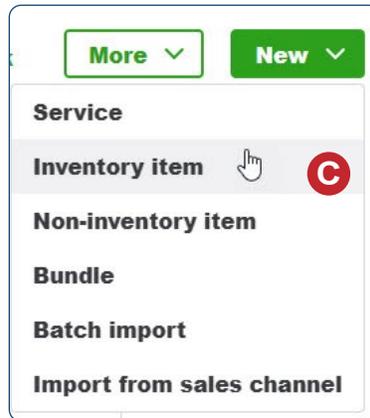
1-20 of 20 < 1 >

	NAME	SALES DESCRIPTION	QTY ON HAND	CATEGORY	SKU	TYPE	PRICE	COST	ACTION
<input type="checkbox"/>	101	Bath towels - ...	43 <span style="background-color: #f4a460; padding: 2px;">LOW</span>		101	Inve...	225	175	<span>Edit</span>   <span>▼</span>
<input type="checkbox"/>	102	Hand towels ...	75		102	Inve...	150	115	<span>Edit</span>   <span>▼</span>
<input type="checkbox"/>	103	Washcloths - ...	67		103	Inve...	114	87	<span>Edit</span>   <span>▼</span>
<input type="checkbox"/>	104	Standard she...	300		104	Inve...	31.75	23.50	<span>Edit</span>   <span>▼</span>

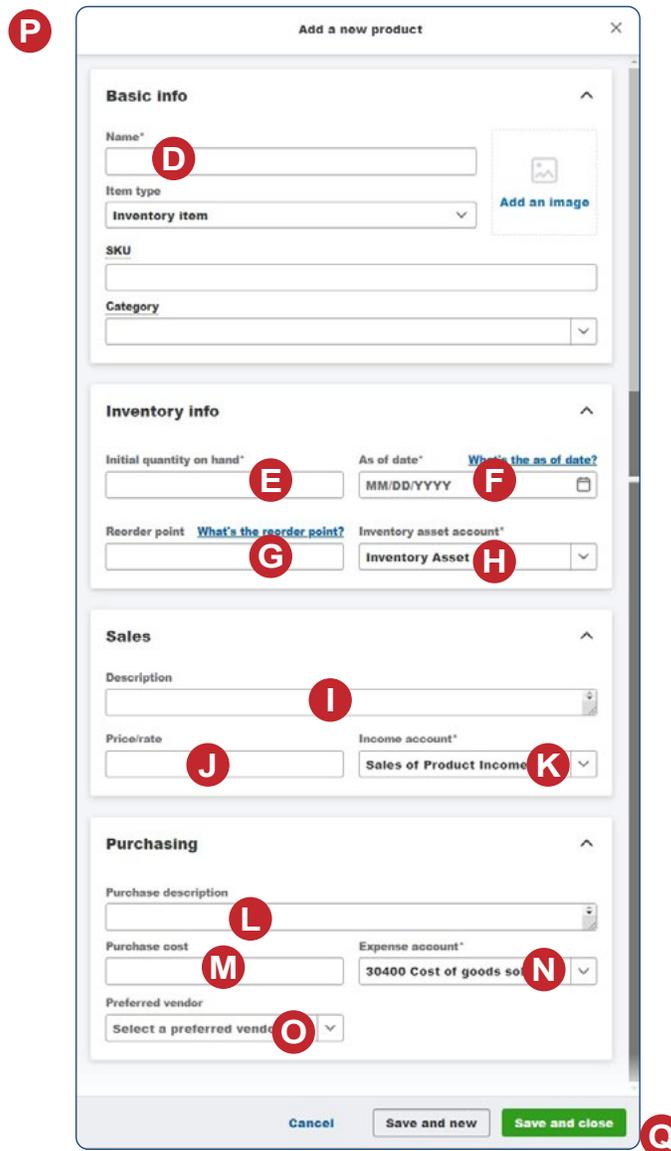


## Add an Inventory Item Record

QBO windows (continued)



A dropdown menu is shown with two buttons at the top: "More" and "New". The menu is open, displaying several options: "Service", "Inventory item", "Non-inventory item", "Bundle", "Batch import", and "Import from sales channel". A red circle labeled "C" is positioned to the right of the "Inventory item" option, which has a mouse cursor hovering over it.



The "Add a new product" form is displayed with several sections and fields, each marked with a red letter in a circle:

- Basic info:** Name\* (D), Item type (Inventory item), SKU, Category.
- Inventory info:** Initial quantity on hand\* (E), As of date\* (F), Reorder point (G), Inventory asset account\* (H).
- Sales:** Description (I), Price/rate (J), Income account\* (K).
- Purchasing:** Purchase description (L), Purchase cost (M), Expense account\* (N), Preferred vendor (O).

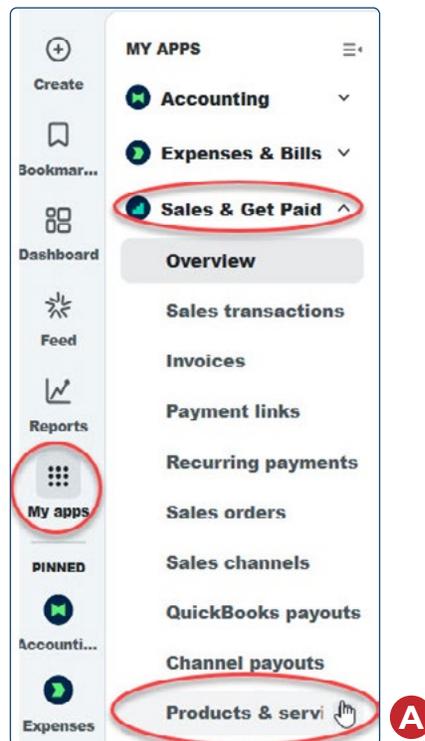
At the bottom of the form, there are three buttons: "Cancel", "Save and new", and "Save and close" (Q).



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

Step	Box or Other Location	Procedure
<b>A</b>	<b>My apps menu</b>	Click <b>Sales &amp; Get Paid</b> → <b>Products &amp; services</b> to open a list of products and services.
<b>B</b>	<b>Action column - Edit link</b>	Locate the item you want to edit and click the <b>Edit link</b> in the <b>Action column</b> to open that item's detail window.
<b>C</b>	<b>Main item window</b>	Change the appropriate information in the detail window for the item.
<b>D</b>	<b>Save options</b>	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)

**Products & services** Give feedback More New

**Out of stock**  
2 items are out of stock. [See all](#)

**Low stock**  
5 items are running low on stock. [See all](#)

Search by name, SKU or categ Filter Print Export Settings

1-20 of 20 < 1 >

<input type="checkbox"/>	NAME	SALES DESCRIPTION	QTY ON HAND	CATEGORY	SKU	TYPE	PRICE	COST	ACTION
<input type="checkbox"/>	 101	Bath towels - 1...	43 <b>LOW</b>		101	Inven...	225	175	<a href="#">Edit</a>   <span>▼</span>
<input type="checkbox"/>	 102	Hand towels - 1...	75		102	Inven...	150	115	<a href="#">Edit</a>   <span>▼</span>
<input type="checkbox"/>	 103	Washcloths - 1...	0 <b>LOW</b> <b>OUT</b>		103	Inven...	114	87	<a href="#">Edit</a>   <span>▼</span> <b>B</b>
<input type="checkbox"/>	 104	Standard sheet...	0 <b>LOW</b> <b>OUT</b>		104	Inven...	31.75	23.50	<a href="#">Edit</a>   <span>▼</span>
<input type="checkbox"/>	 105	Queen sheet set	125		105	Inven...	35.75	26.50	<a href="#">Edit</a>   <span>▼</span>



# Change Information in an Existing Inventory Item's Record

QBO windows (continued)

C

103 ✕

### Basic Info

Name\*

Item type

SKU

Category

Add an image

### Inventory info

Quantity on hand	Adjust: <span style="color: green;">Quantity</span>   <span style="color: green;">Starting value</span>	67
Quantity on sales order		0
Quantity available		67
Quantity on purchase order		0

Reorder point [What's the reorder point?](#)

Inventory asset account\*

### Sales

Description

Price/rate

Income account\*

### Purchasing

Purchase description

Purchase cost

Expense account\*

Preferred vendor

Cancel Make Inactive Save

D

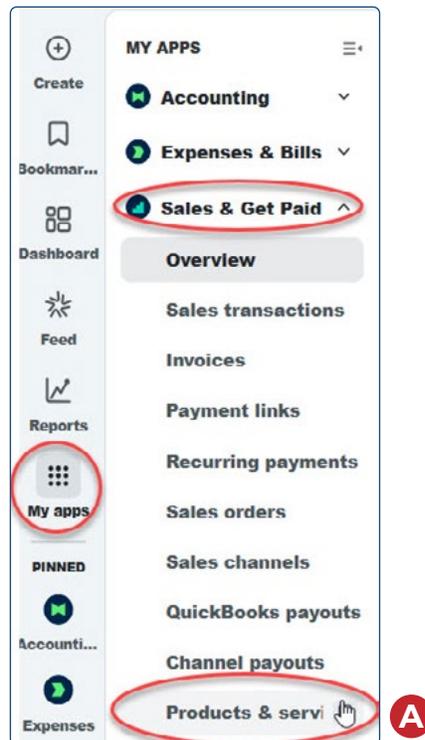


## Make an Inventory Item's Record Inactive – Quick Reference Table

Step	Box or Other Location	Procedure
<b>A</b>	<b>My apps menu</b>	Click <b>Sales &amp; Get Paid</b> → <b>Products &amp; services</b> to open a list of products and services.
<b>B</b>	<b>Item check box</b>	Locate the item you want to make inactive and click the check box to the left of the item.
<b>C</b>	<b>Pop-out menu</b>	When the pop-out menu appears, click the <b>Make inactive button</b> .
<b>D</b>	<b>QBO message</b>	A warning message will appear asking if you're sure you want to inactivate the item. Click <b>Make inactive button</b> .

## Make an Inventory Item's Record Inactive

### QBO windows



# Make an Inventory Item's Record Inactive

QBO windows (continued)

**Products & services** Give feedback More New

**Low stock**  
1 item is running low on stock. [See all](#)

1 item selected Adjust quantity Reorder Make inactive Assign Category

	NAME	SALES DESCRIPTION	QTY ON HAND	CATEGORY	SKU	TYPE	PRICE	COST	ACTION
<input type="checkbox"/>	101	Bath towels - 100 pack	43 <b>Low</b>		101	Inventory	225	175	<a href="#">Edit</a>
<input type="checkbox"/>	102	Hand towels - 100 pack	75		102	Inventory	150	115	<a href="#">Edit</a>
<input checked="" type="checkbox"/>	103	Washcloths - 100 pack	67		103	Inventory	114	97	<a href="#">Edit</a>
<input type="checkbox"/>	104	Standard sheet set	300		104	Inventory	31.75	23.50	<a href="#">Edit</a>
<input type="checkbox"/>	105	Queen sheet set	125		105	Inventory	35.75	26.50	<a href="#">Edit</a>
<input type="checkbox"/>	106	King sheet set	224		106	Inventory	37.25	28.50	<a href="#">Edit</a>
<input type="checkbox"/>	107	Pillows set of 2	149		107	Inventory	27.50	22.25	<a href="#">Edit</a>

C

B

**!**

### Make this item/variants inactive?

Here's what happens:

- You can't edit it or things like past invoices, bills, or refunds.
- It's marked as deleted but can be activated for new transactions.
- Inventory QTY on hand is set to 0 and we'll update your books.

[Find out more](#) Cancel Make inactive

D

