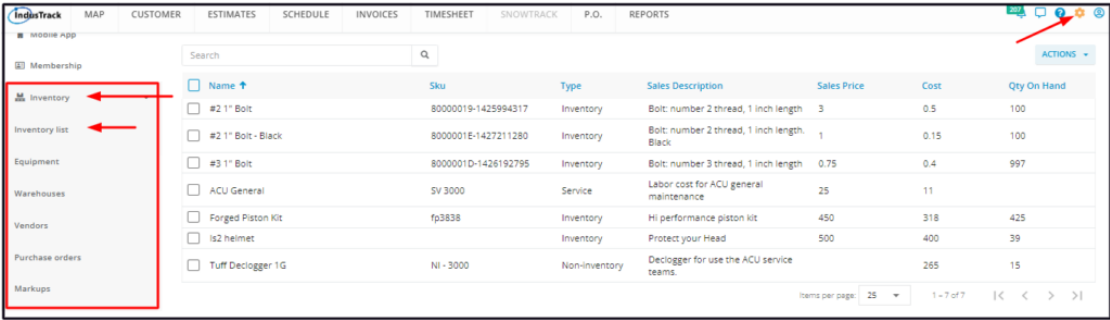


Inventory Items

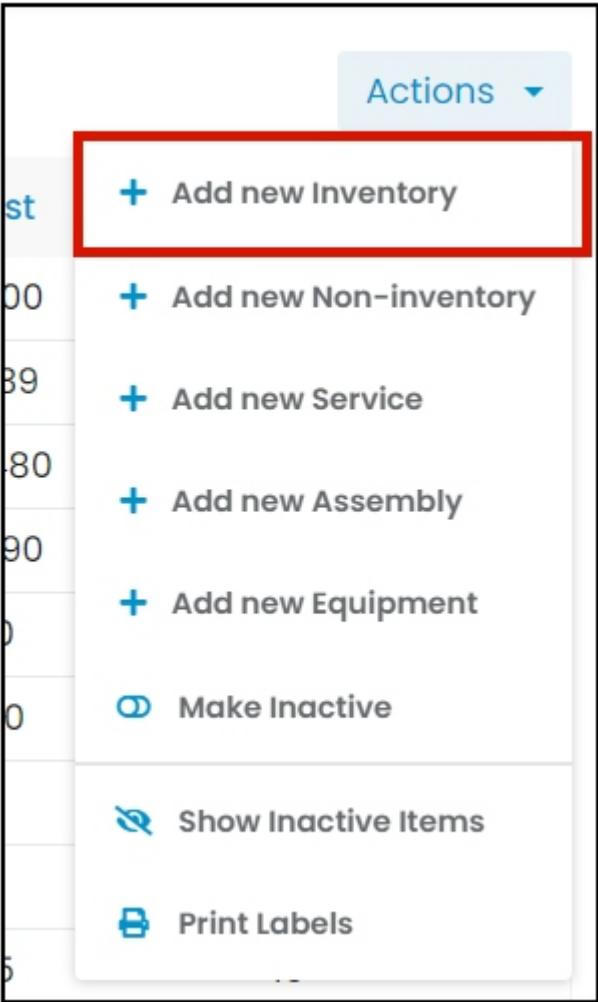
Inventory items are products or goods purchased by the company that are meant for resale or to be charged to the account of the customers.

Set Up a New Inventory Item

To add and manage your inventory items, go to **Settings > Inventory > Inventory List**.



Click on the **Actions** button and select **+ Add new Inventory**.



Fill in the item details on the **Add Inventory window**. Fields with (*) are required.

General Details

Name*

- Key in the name of the inventory item.

Edit Inventory

General

Name *

SKU

Manufacturer Part #

Vendor

Non taxable ☐

Income Account

Sales price/rate

Sales description

Stock

Asset Account

Main warehouse quantity on hand *

Reorder point

☐ Use serial #'s (Quantity calculates automatically depending serial numbers)

Warehouse	Bin #	Isle #	QTY
Main warehouse			123
Total quantity:			123

CANCEL SAVE

SKU

- Key in the item's assigned product code.

Edit Inventory

General

Name *

SKU

Manufacturer Part #

Vendor

Non taxable ☐

Income Account

Sales price/rate

Sales description

Stock

Asset Account

Main warehouse quantity on hand *

Reorder point

☐ Use serial #'s (Quantity calculates automatically depending serial numbers)

Warehouse	Bin #	Isle #	QTY
Main warehouse			123
Total quantity:			123

CANCEL SAVE

Vendor

- Select the supplier from the drop-down list.
- If the supplier is not on the list, key in the name. This will be added to the vendor list when the item is saved.

Edit Inventory

General

Name * Hammer 6

SKU 456

Manufacturer Part #

Vendor

Non taxable ☐

Income Account Account Search x

Sales price/rate 60.5

Sales description hammer for all

Stock

Asset Account Account Search x

Main warehouse quantity on hand * 123

Reorder point

☐ Use serial #s (Quantity calculates automatically depending serial numbers)

Warehouse	Bin #	Isle #	QTY
Main warehouse			123
Total quantity:			123

CANCEL SAVE

Non taxable

- If the item is not taxable, tick the checkbox. But if it is, leave the checkbox empty.

Edit Inventory

General

Name * Hammer 6

SKU 456

Manufacturer Part #

Vendor

Non taxable ☐

Income Account Account Search x

Sales price/rate 60.5

Sales description hammer for all

Stock

Asset Account Account Search x

Main warehouse quantity on hand * 123

Reorder point

☐ Use serial #s (Quantity calculates automatically depending serial numbers)

Warehouse	Bin #	Isle #	QTY
Main warehouse			123
Total quantity:			123

CANCEL SAVE

Income Account

- Select the corresponding income statement account from the dropdown list.
 - Scroll down the list to find the correct account name. OR
 - Key in the account name on the search field to quickly find the correct one.
- If the account name is not on the list, key in on the field. This will be added to the list when the item is saved.

Sales price/rate

- Key in the selling price of a single unit of the item.

Sales Description

- Key in a short description of the item.

Edit Inventory

General

Name * Hammer 6

SKU 456

Manufacturer Part #

Vendor

Non taxable ☐

Income Account Account Search x

Sales price/rate 60.5

Sales description hammer for all

Stock

Asset Account Account Search x

Main warehouse quantity on hand * 123

Reorder point

☐ Use serial #'s (Quantity calculates automatically depending serial numbers)

Warehouse	Bin #	Isle #	QTY
Main warehouse			123
Total quantity:			123

CANCEL SAVE

Expense Account

- Select the corresponding expense account from the dropdown list.
 - Scroll down the list to find the correct account name. OR
 - Key in the account name on the search field to quickly find the correct one.
- If the account name is not on the list, key in on the field. This will be added to the list when the item is saved.

Cost

- Key in the acquisition cost of a single unit of the product.

Purchasing Description

- Key in any special purchasing notes, if any, such as required order lead time.

Edit Inventory

Non taxable ☐

Income Account Account Search x

Sales price/rate 60.5

Sales description hammer for all

Expense Account Account Search x

Cost 55

Purchasing description

Warehouse	Bin #	Isle #	QTY
Main warehouse			123
Total quantity:			123

CANCEL SAVE

Stock Details

Asset Account

- Select the corresponding asset account from the dropdown list.
 - Scroll down the list to find the correct account name. OR
 - Key in the account name on the search field to quickly find the correct one.
- If the account name is not on the list, key in on the field. This will be added to the list when the item is saved.

Main warehouse quantity on hand *

- Key in the stocks on hand. This will now be your beginning inventory at the **Main Warehouse**.
 - The Inventory can also be monitored using serial numbers. See the section *Use serial #s* below to learn how this works.
- This is a required field so if there is no quantity on hand, use 0.
- Once the item is saved and the stock location information is already available, or if applicable, open the item details in edit mode and enter the **Bin #** and/or **Isle #**.

Reorder Point

- Set the minimum quantity for reordering.

Edit Inventory

General

Name *

SKU

Manufacturer Part #

Vendor

Non taxable ☐

Income Account

Sales price/rate

Sales description

Stock

Asset Account

Main warehouse quantity on hand *

Reorder point

☐ Use serial #s (Quantity calculates automatically depending serial numbers)

Warehouse	Bin #	Isle #	QTY
Main warehouse			123
Total quantity:			123

CANCEL SAVE

Use serial #s

- With this option, the item's quantity on hand calculates automatically depending on serial numbers. There will be no need to enter a value on the *Main warehouse quantity on hand **.
- Leave the checkbox unticked, if this option is not to be used.

To **enable this option**, tick the checkbox. A warning window will come up. Click the **OK** button to continue and **Cancel** to abandon the action.

onetrack.industrack.com says

Are you sure you want to use serial number for this item, this will clear the quantity on hand to 0

OK Cancel

- The field for entering the serial numbers will come up. On the Serials tab, click the **Enter New Serial Batch** button.

Edit Inventory

General

Name * Hammer 6

SKU 456

Manufacturer Part #

Vendor

Non taxable ☐

Income Account Account Search

Sales price/rate 60.5

Sales description hammer for all

Stock

Asset Account Account Search

Main warehouse quantity on hand * 123

Reorder point

☐ Use serial #'s (Quantity calculates automatically depending serial numbers)

Warehouse	Bin #	Isle #	QTY
Main warehouse			123
Total quantity:			123

CANCEL SAVE

- Set the expiration date of the items. Use the date picker or key in the date on the field.
- Key in the serial number or numbers of the item(s) at the Main Warehouse.
 - For multiple batches, enter the expiration dates and/or serial numbers separately.

Add Inventory

General

Name * 3ft Cold Water PVC

SKU INV - 4000

Vendor KPL Industrial

Non taxable ☐

Income Account Construction Income

Sales price/rate 3.25

Sales description 3 feet Cold Water PVC Pipe, orange

Expense Account Cost of Goods Sold

Cost 1.75

Stock

Asset Account Inventory Asset

Main warehouse quantity on hand * 100.00

Reorder point \$0.00

☒ Use serial #'s (Quantity calculates automatically depending serial numbers)

Serials (0) Warehouses (0)

Serial

Expiration Date 7/30/2023

Serials A46590 A46587

ENTER NEW SERIAL BATCH

PROCEED

CANCEL SAVE

- Save the serial number(s) by clicking the **Proceed** button.

Add Inventory

General

Name * 3ft Cold Water PVC

SKU INV - 4000

Vendor KPL Industrial

Non taxable ☐

Income Account Construction Income

Sales price/rate 3.25

Sales description 3 feet Cold Water PVC Pipe, orange

Expense Account Cost of Goods Sold

Cost 1.75

Stock

Asset Account Inventory Asset

Initial quantity on hand * 2

Reorder point \$0.00

☒ Use serial #'s (Quantity calculates automatically depending serial numbers)

Serials (2) Warehouses (0)

ENTER NEW SERIAL BATCH

Serial	Warranty Expiration Date	Bin #	Isle #
A46590	7/29/2023		
A46587	7/29/2023		

CANCEL SAVE

- If the stock location information is already available, or if applicable, enter the **Bin #** and/or **Isle #**.

Add Inventory

General

Name * 3ft Cold Water PVC

SKU INV - 4000

Vendor KPL Industrial

Non taxable ☐

Income Account Construction Income

Sales price/rate 3.25

Sales description 3 feet Cold Water PVC Pipe, orange

Expense Account Cost of Goods Sold

Cost 1.75

Stock

Asset Account Inventory Asset

Initial quantity on hand * 2

Reorder point \$0.00

☒ Use serial #s (Quantity calculates automatically depending serial numbers)

Serials (2) Warehouses (0)

Serial	Warranty Expiration Date	Bin #	Lot #
A46590	7/29/2023		
A46587	7/29/2023		

CANCEL SAVE

- Once the item is saved, the total inventory at the Main Warehouse will be recorded in the Warehouses tab.
- The *Main warehouse quantity on hand* * will also be replaced with *Initial quantity on hand*.

Edit Inventory

General

Name * 3ft Cold Water PVC

SKU INV - 4000

Vendor KPL Industrial

Non taxable ☐

Income Account Construction Income

Sales price/rate 3.25

Sales description 3 feet Cold Water PVC Pipe, orange

Expense Account Cost of Goods Sold

Cost 1.75

Stock

Asset Account Inventory Asset

Initial quantity on hand * 3

Reorder point \$0

☒ Use serial #s (Quantity calculates automatically depending serial numbers)

Serials (3) Warehouses (1)

Warehouse	QTY
Main warehouse	3

CANCEL SAVE

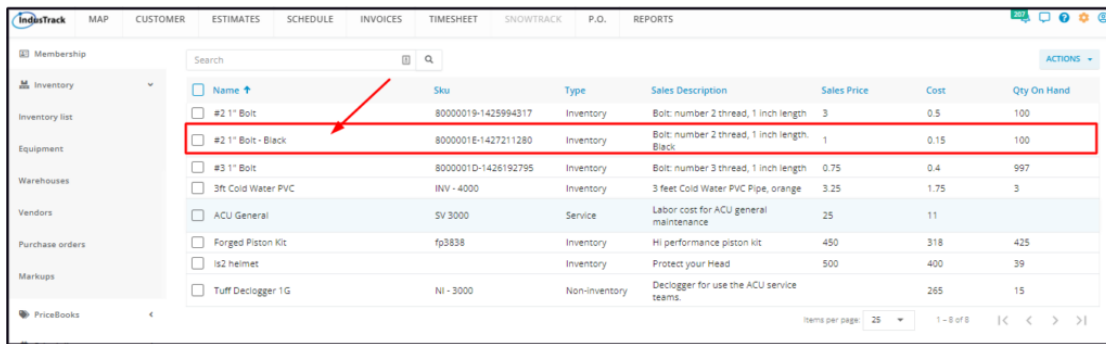
Save the new inventory item. This will be added to the [Inventory List](#).

Name	Sku	Type	Sales Description	Sales Price	Cost	Qty On Hand
#2 1" Bolt	80000019-1425994317	Inventory	Bolt: number 2 thread, 1 inch length	3	0.5	100
#2 1" Bolt - Black	8000001E-1427211280	Inventory	Bolt: number 2 thread, 1 inch length, Black	1	0.15	100
#3 1" Bolt	8000001D-1426192795	Inventory	Bolt: number 3 thread, 1 inch length	0.75	0.4	997
3ft Cold Water PVC	INV - 4000	Inventory	3 feet Cold Water PVC Pipe, orange	3.25	1.75	3
ACU General	SV 3000	Service	Labor cost for ACU general maintenance	25	11	
Forged Piston Kit	fp3838	Inventory	Hi performance piston kit	450	318	425
Is2 helmet		Inventory	Protect your Head	500	400	39
Tuff Declogger 1G	NI - 3000	Non-inventory	Declogger for use the ACU service teams		265	15

Update the Details of an Inventory Item

Updating of inventory is limited to [Office Users](#) who have editing permissions.

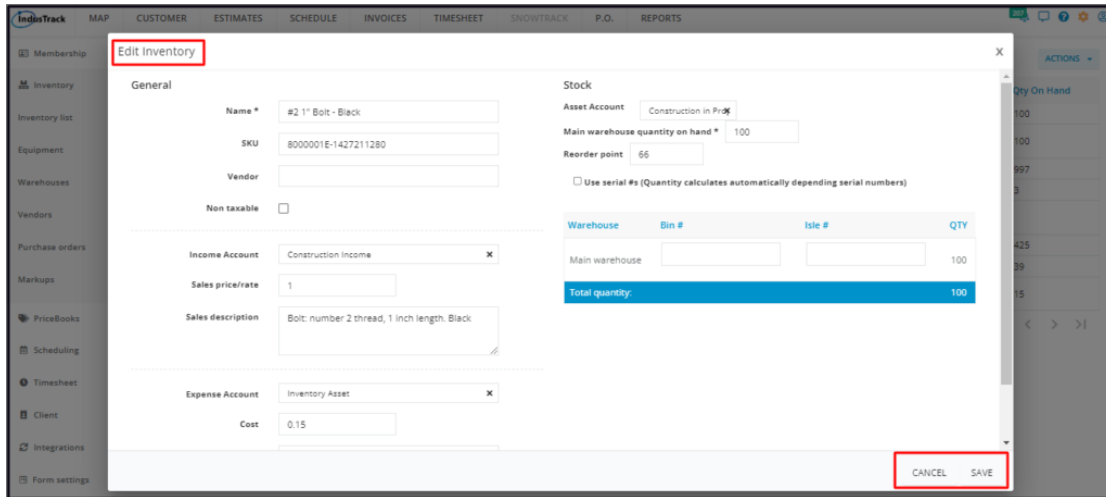
Find the inventory item to be updated from the list. Click on the item and the information will open in edit mode.



Name	SKU	Type	Sales Description	Sales Price	Cost	Qty On Hand
#2 1" Bolt	80000019-1425994317	Inventory	Bolt: number 2 thread, 1 inch length	3	0.5	100
#2 1" Bolt - Black	8000001E-1427211280	Inventory	Bolt: number 2 thread, 1 inch length, Black	1	0.15	100
#3 1" Bolt	8000001D-1426192795	Inventory	Bolt: number 3 thread, 1 inch length	0.75	0.4	997
3ft Cold Water PVC	INV - 4000	Inventory	3 feet Cold Water PVC Pipe, orange	3.25	1.75	3
ACU General	SV 3000	Service	Labor cost for ACU general maintenance	25	11	
Forged Piston Kit	fp3838	Inventory	Hi performance piston kit	450	318	425
Is2 helmet		Inventory	Protect your Head	500	400	39
Tuff Declogger 1G	NI - 3000	Non-inventory	Declogger for use the ACU service teams.		265	15

Edit/Update as may be needed. Once done, **Save** the changes.

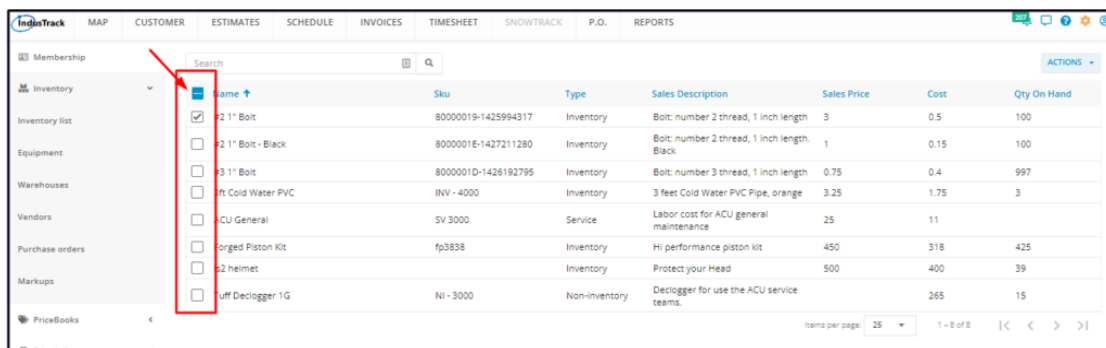
- Inactive inventory items are not editable. These will have to be reactivated first.



Deactivate an Inventory Item

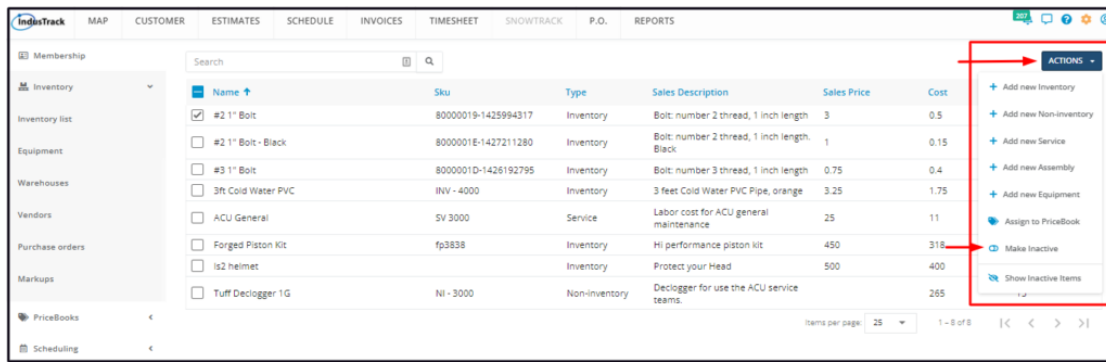
Deactivate an inventory item if this will no longer be held in inventory. This is an option to take instead of deleting the item which could cause errors.

Find the item to be deactivated from the list and tick the checkbox to its left.

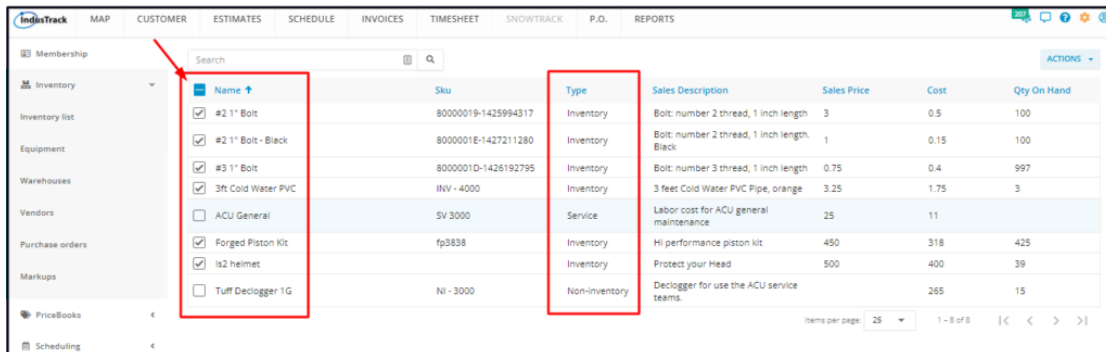


Name	SKU	Type	Sales Description	Sales Price	Cost	Qty On Hand
<input checked="" type="checkbox"/> #2 1" Bolt	80000019-1425994317	Inventory	Bolt: number 2 thread, 1 inch length	3	0.5	100
<input type="checkbox"/> #2 1" Bolt - Black	8000001E-1427211280	Inventory	Bolt: number 2 thread, 1 inch length, Black	1	0.15	100
<input type="checkbox"/> #3 1" Bolt	8000001D-1426192795	Inventory	Bolt: number 3 thread, 1 inch length	0.75	0.4	997
<input type="checkbox"/> 3ft Cold Water PVC	INV - 4000	Inventory	3 feet Cold Water PVC Pipe, orange	3.25	1.75	3
<input type="checkbox"/> ACU General	SV 3000	Service	Labor cost for ACU general maintenance	25	11	
<input type="checkbox"/> Forged Piston Kit	fp3838	Inventory	Hi performance piston kit	450	318	425
<input type="checkbox"/> Is2 helmet		Inventory	Protect your Head	500	400	39
<input type="checkbox"/> Tuff Declogger 1G	NI - 3000	Non-inventory	Declogger for use the ACU service teams.		265	15

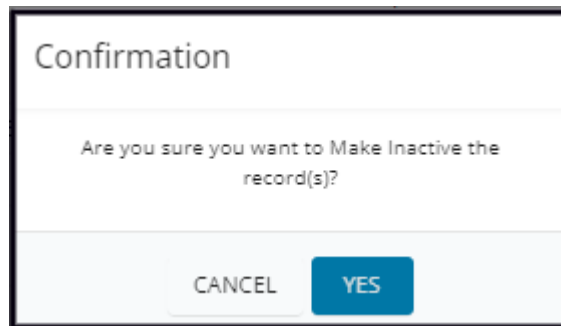
Click the **Actions** button and select **Make Inactive**.



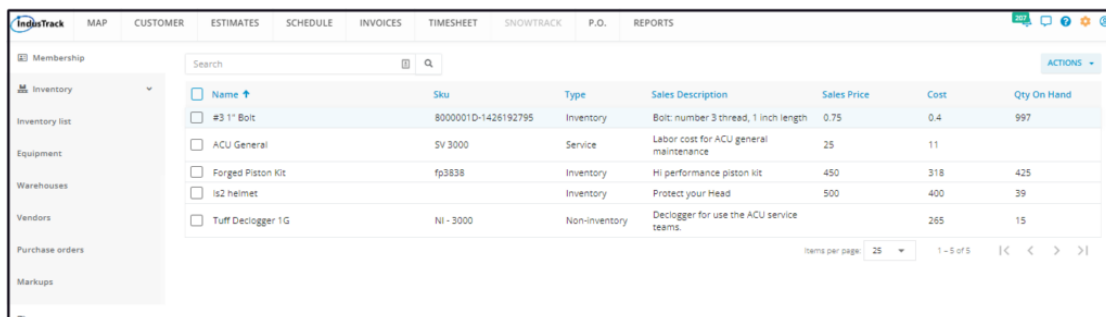
- To deactivate multiple inventory items, tick the checkboxes to the left of all. If all items will be deactivated, just tick the checkbox of the Name header. Just note that the list includes the other types of inventory. And then go to the **Actions** button and select **Make Inactive**.



A warning window will come up. Click the **Yes** button to continue with the deactivation and **Cancel** to abandon the action.



The item will be removed from the **Active List** and moved to the **Inactive List**.



Name	SKU	Type	Sales Description	Sales Price	Cost	Qty On Hand
#2 1" Bolt	80000019-1425994317	Inventory	Bolt: number 2 thread, 1 inch length	3	0.5	100
#2 1" Bolt - Black	8000001E-1427211280	Inventory	Bolt: number 2 thread, 1 inch length. Black	1	0.15	100
3ft Cold Water PVC	INV - 4000	Inventory	3 feet Cold Water PVC Pipe, orange	3.25	1.75	3

Reactivate a Deactivated Inventory Item

Go to the Inactive Inventory List

Name	SKU	Type	Sales Description	Sales Price	Cost	Qty On Hand
#3 1" Bolt	8000001D-1426192795	Inventory	Bolt: number 3 thread, 1 inch length	0.75	0.4	
ACU General	SV 3000	Service	Labor cost for ACU general maintenance	25	11	
Forged Piston Kit	fp3838	Inventory	Hi performance piston kit	450	318	
Is2 helmet		Inventory	Protect your Head	500	400	
Tuff Declogger 1G	NI - 3000	Non-inventory	Declogger for use the ACU service teams.		265	

Find the inventory item to be reactivated from the list and tick the checkbox to its left.

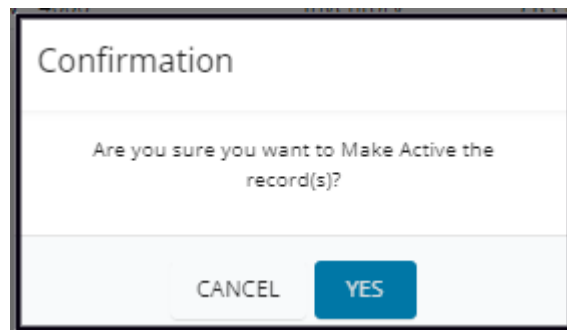
Name	SKU	Type	Sales Description	Sales Price	Cost	Qty On Hand
#2 1" Bolt	80000019-1425994317	Inventory	Bolt: number 2 thread, 1 inch length	3	0.5	100
#2 1" Bolt - Black	8000001E-1427211280	Inventory	Bolt: number 2 thread, 1 inch length. Black	1	0.15	100
<input checked="" type="checkbox"/> 3ft Cold Water PVC	INV - 4000	Inventory	3 feet Cold Water PVC Pipe, orange	3.25	1.75	3

Click the **Actions** button and select **Make Active**.

Name	SKU	Type	Sales Description	Sales Price	Cost	Qty On Hand
#2 1" Bolt	80000019-1425994317	Inventory	Bolt: number 2 thread, 1 inch length	3	0.5	
#2 1" Bolt - Black	8000001E-1427211280	Inventory	Bolt: number 2 thread, 1 inch length. Black	1	0.15	
<input checked="" type="checkbox"/> 3ft Cold Water PVC	INV - 4000	Inventory	3 feet Cold Water PVC Pipe, orange	3.25	1.75	

- To reactivate multiple inventory items, tick the checkboxes to the left of all. If all items will be reactivated, just tick the checkbox of the Name header. Just note that the list includes the other types of inventory.
- Go to the **Actions** button and select **Make Active**.

A warning window will come up. Click the **Yes** button to continue with the reactivation and **Cancel** to abandon the action.



The item will be removed from the **Inactive List** and moved to the **Active List**.

IndusTrack MAP CUSTOMER ESTIMATES SCHEDULE INVOICES TIMESHEET SNOWTRACK P.O. REPORTS

Membership

Inventory

Inventory list

Equipment

Warehouses

Vendors

Purchase orders

Markups

Search

Name	SKU	Type	Sales Description	Sales Price	Cost	Qty On Hand
<input type="checkbox"/> #2 1" Bolt	80000019-1425994317	Inventory	Bolt: number 2 thread, 1 inch length	3	0.5	100
<input type="checkbox"/> #2 1" Bolt - Black	8000001E-1427211280	Inventory	Bolt: number 2 thread, 1 inch length, Black	1	0.15	100

Items per page: 25 1 - 2 of 2

IndusTrack MAP CUSTOMER ESTIMATES SCHEDULE INVOICES TIMESHEET SNOWTRACK P.O. REPORTS

Membership

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Equipment

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Vendors

Purchase orders

Markups

Search

Name	SKU	Type	Sales Description	Sales Price	Cost	Qty On Hand
<input type="checkbox"/> #3 1" Bolt	8000001D-1426192795	Inventory	Bolt: number 3 thread, 1 inch length	0.75	0.4	997
<input type="checkbox"/> 3ft Cold Water PVC	INV - 4000	Inventory	3 feet Cold Water PVC Pipe, orange	3.25	1.75	3
<input type="checkbox"/> ACU General	SV 3000	Service	Labor cost for ACU general maintenance	25	11	
<input type="checkbox"/> Forged Piston Kit	fp3838	Inventory	Hi performance piston kit	450	318	425
<input type="checkbox"/> Is2 helmet		Inventory	Protect your Head	500	400	39
<input type="checkbox"/> Tuff Declogger 1G	NI - 3000	Non-inventory	Declogger for use the ACU service teams.		265	15

Items per page: 25 1 - 6 of 6

Update the inventory as may be needed.

Delete an Inventory Item

Delete an Inventory Item that is no longer in use or was created in error. It is wise to exercise caution when using this function. Deleting an inventory item may have an effect on other functions, settings or data. This action can not be undone.

If the item has an active status, **deactivate this first**. An active inventory item can not be deleted.

Move to the **Inactive Inventory** table.

IndusTrack MAP CUSTOMER ESTIMATES SCHEDULE INVOICES TIMESHEET SNOWTRACK P.O. REPORTS

Reports

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Purchase orders

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Search

Name	SKU	Type	Sales Description	Sales Price	Cost	Qty On Hand
<input type="checkbox"/> #2 1" Bolt	80000019-1425994317	Inventory	Bolt: number 2 thread, 1 inch length	3	0.5	
<input type="checkbox"/> #2 1" Bolt - Black	8000001E-1427211280	Inventory	Bolt: number 2 thread, 1 inch length, Black	1	0.15	
<input type="checkbox"/> #3 1" Bolt	8000001D-1426192795	Inventory	Bolt: number 3 thread, 1 inch length	0.75	0.4	
<input type="checkbox"/> 3ft Cold Water PVC	INV - 4000	Inventory	3 feet Cold Water PVC Pipe, orange	3.25	1.75	
<input type="checkbox"/> ACU General	SV 3000	Service	Labor cost for ACU general maintenance	25	11	
<input type="checkbox"/> Central ACU General Maintenance	SV 5000	Service	General Maintenance service of central airconditioning units.	135	65	
<input type="checkbox"/> Forged Piston Kit	fp3838	Inventory	Hi performance piston kit	450	318	
<input type="checkbox"/> Is2 helmet		Inventory	Protect your Head	500	400	
<input type="checkbox"/> Tuff Declogger 1G	NI - 3000	Non-inventory	Declogger for use the ACU service teams.		265	15

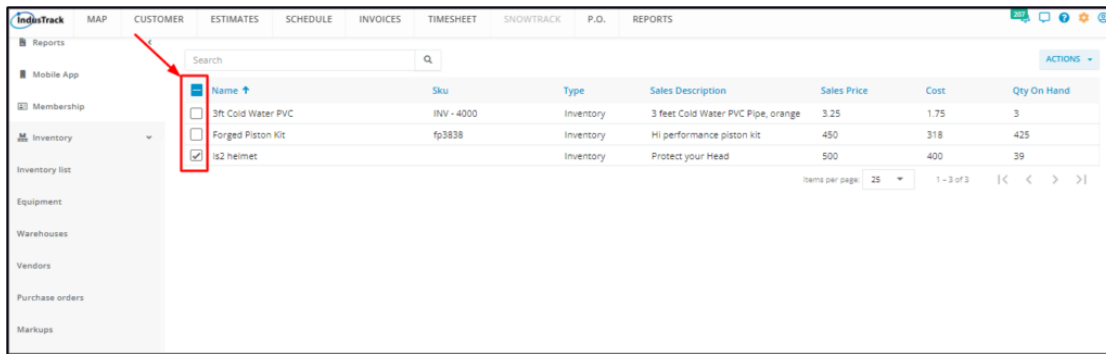
Items per page: 25 1 - 9 of 9

ACTIONS

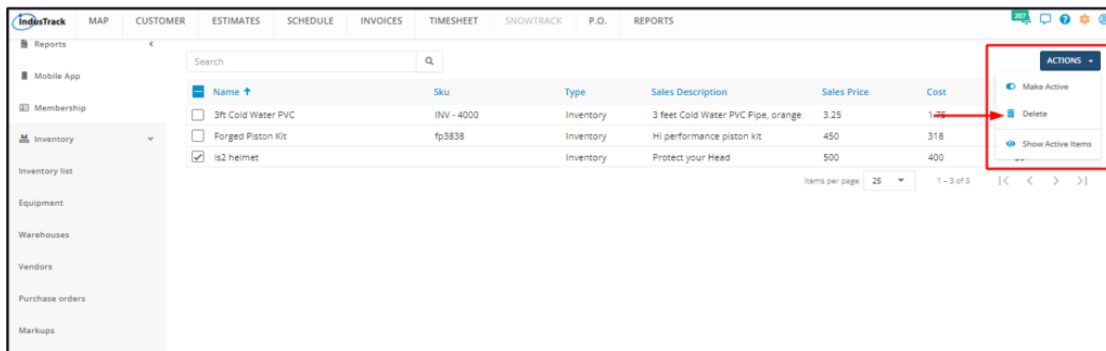
- + Add new Inventory
- + Add new Non-inventory
- + Add new Service
- + Add new Assembly
- + Add new Equipment
- Assign to PriceBook
- Make Inactive
- Show Inactive Items

Find the Inventory item to be deleted from the list, and tick the checkbox to its left.

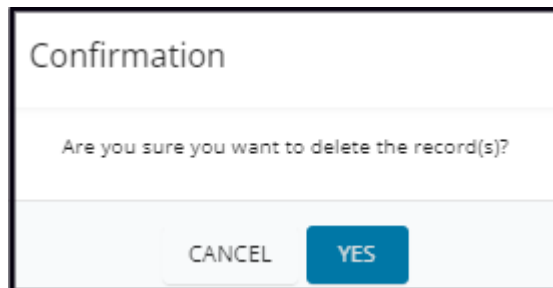
- To delete multiple inventory items, tick the checkboxes to the left of all. If all items will be deleted, just tick the checkbox of the Name header. Just note that the list includes the other types of inventory.



Go to the **Actions** button and select **Delete**.



A warning window will come up. Click the **Yes** button to continue with the deletion and **Cancel** to abandon the action.



The inventory item will be removed from the Inactive Inventory list.