

Product Inventory



This document will review how to set up a product with an Inventory Quantity Adjustment to help limit and track the quantity of the product being sold.

How do Limited Quantity Items work?

Products that are set up with this additional option have their units added or subtracted to reflect the quantity available in real time. When a product's inventory goes down to zero, it will show as out of stock, preventing the product from being oversold. You can also use inventory to determine how many products to order from a vendor. Examples of products to use this feature on include clothing, field trip spots, yearbooks, tickets, and more.

How do I use Inventory Quantity Adjustments?

1. Set up a new product or edit an existing product before going to the "Additional Options" tab on the Product.
2. Under the Additional Options tab check the box for "Limited Quantity Item".

Activity Inventory

☒ Limited Quantity Item

Quantity Available must be set via Inventory Quantity Adjustments after completing item setup

Example of Limited Quantity Item Checkbox

3. Go to **Transactions >> Inventory Quantity Adjustments**.
4. Click **Edit** on the product to set up a quantity.

Activity No	Activity Name	Price	Sponsor/Teacher	Quantity Available	Quantity Limited	Active	Active
ZY966-1	Spirit Shirt - Size Small	\$15.00	zbaker@edlio.com	0	<input checked="" type="checkbox"/>	1 True	<input checked="" type="checkbox"/>

Inventory Quantity Adjustments Page

5. Select Add or Subtract, enter a reason for the adjustment, and input the quantity.

a. Click **Update**.

Enter Quantity Adjustment

☒ Add

☐ Subtract

Reason

First order of shirts

Quantity

100

✕ Cancel

🔄 Update

Example of Entering Quantity Adjustment

6. The system will notify you if it was successfully saved and will show an updated quantity.
7. To view the Transaction History or Sale and Returns of the product, Click **Edit** on the desired Product.

Transaction History				
Inventory Adjustments				
Transaction ID	User	Reason	Date	Quantity
584	Bookkeeper OSP	First Order of shirts	10/7/2021 3:13:44 PM	50
585	Bookkeeper OSP	Sold in person	10/7/2021 3:14:00 PM	-5
586	Bookkeeper OSP	recounting amount	10/7/2021 3:14:20 PM	-2
Total Item Adjustments				43
Sales and Returns				
Order Number	Type	Student	Date	Quantity
1112999-100002776	Sale	McCormick, Kenny	9/8/2020 10:24:00 AM	1
1112999-100004208	Sale	not Required, not Required	6/22/2021 1:29:01 PM	1
TR-100002155	Sale	NoStudentRequired, NoStudentRequired	5/28/2020 1:09:58 PM	1

Example of Quantity *Transaction History*

8. If your Product runs out of inventory, it will not be able to be purchased from the Store. Once out of stock you will need to go back in and add additional quantities or make the product inactive.

Spirit Shirts - Small

SKU ZY986-147

Item is out of stock.

Spirit Shirts - Small

All Sizes, Select from Drop Down

Small

Qty

1

Price : \$15.00

Quantity Remaining: 0

Size Small