

How to Create a Stock Item in Acumatica

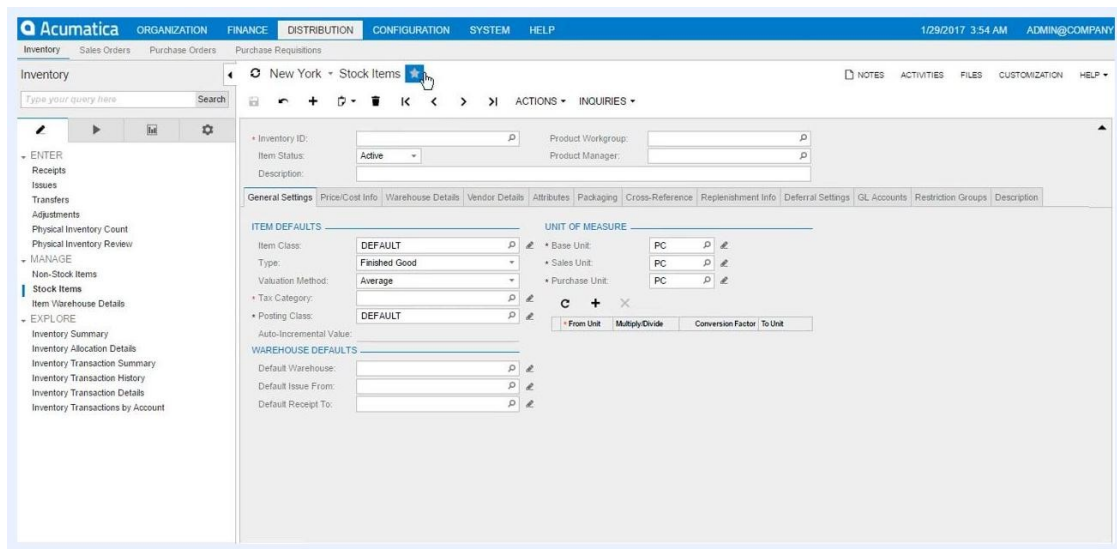
This guide walks you through how to create a stock item in Acumatica, including setting up inventory defaults, assigning a warehouse, entering pricing information, and optionally associating vendor details. By the end of this process, you will have a fully configured stock item ready for use.

Prerequisites

Before you begin, make sure you have access to the **DISTRIBUTION** module and the necessary permissions to manage stock items and inventory preferences.

Step 1: Navigate to the Stock Items screen

Go to the top menu and select **DISTRIBUTION**. In the left sidebar, under **MANAGE**, click **Stock Items**. The Stock Items screen opens, displaying fields for Inventory ID, Item Status, Description, and various tabs for item configuration.

The screenshot shows the Acumatica web interface. At the top, there's a navigation bar with tabs: ORGANIZATION, FINANCE, DISTRIBUTION (selected), CONFIGURATION, SYSTEM, and HELP. Below this is a sub-navigation bar with: Inventory, Sales Orders, Purchase Orders, and Purchase Requisitions. The main header area shows 'New York' and 'Stock Items' with a plus icon. A search bar is on the left. The left sidebar has a tree view with categories: ENTER (Receipts, Issues, Transfers, Adjustments, Physical Inventory Count, Physical Inventory Review), MANAGE (Non-Stock Items, Stock Items (selected), Item Warehouse Details), and EXPLORE (Inventory Summary, Inventory Allocation Details, Inventory Transaction Summary, Inventory Transaction History, Inventory Transaction Details, Inventory Transactions by Account). The main content area is titled 'Stock Items' and contains several input fields: 'Inventory ID' (empty), 'Item Status' (set to 'Active'), 'Product Workgroup' (empty), and 'Product Manager' (empty). Below these are tabs for configuration: General Settings (selected), Price/Cost Info, Warehouse Details, Vendor Details, Attributes, Packaging, Cross-Reference, Replenishment Info, Deferral Settings, GL Accounts, Restriction Groups, and Description. The 'General Settings' tab is active and shows 'ITEM DEFAULTS' and 'UNIT OF MEASURE' sections. 'ITEM DEFAULTS' includes: Item Class (DEFAULT), Type (Finished Good), Valuation Method (Average), Tax Category (empty), and Posting Class (DEFAULT). 'UNIT OF MEASURE' includes: Base Unit (PC), Sales Unit (PC), and Purchase Unit (PC). At the bottom, there's a 'WAREHOUSE DEFAULTS' section with fields for Default Warehouse, Default Issue From, and Default Receipt To, all of which are empty.

Stock Items screen with empty Inventory ID field and default settings visible

Step 2: Enter the Inventory ID and description

In the **Inventory ID** field, enter **TSHIRT**. In the **Description** field, enter **Tshirt**. The **Item Status** field should be set to **Active** by default.

The screenshot shows the Acumatica 'Inventory Preferences' window for the 'New York' organization. The window is divided into several sections: 'General Settings', 'NUMBERING SETTINGS', 'POSTING AND RETENTION SETTINGS', 'DATA ENTRY SETTINGS', 'INVENTORY OPTIONS', 'ACCOUNT SETTINGS', 'DEFAULT REASON CODES', and 'PHYSICAL INVENTORY SETTINGS'. The 'Inventory ID' field is set to 'TSHIRT' and the 'Description' field is set to 'Tshirt'. The 'Item Status' field is set to 'Active'. The 'Default Item Class' is set to 'DEFAULT'. The 'Batch Numbering Sequence' is set to 'BATCH - GL Batch'. The 'Receipt/Transfer Numbering Sequence' is set to 'INRECEIPT - IN Receipt'. The 'Issue Numbering Sequence' is set to 'INISSUE - IN Issue'. The 'Adjustment Numbering Sequence' is set to 'INADJUST - IN Adjustment'. The 'PI Numbering Sequence' is set to 'PID - Physical Inventory ID'. The 'Replenishment Numbering Sequence' is set to 'INREPL - IN Replenishment'. The 'Weight UOM' is set to 'KG'. The 'Volume UOM' is set to 'LITER'. The 'Replan Back-Orders' checkbox is checked. The 'AR Clearing Account' is set to '111000 - AR accrual'. The 'AR Clearing Sub.' is set to 'US-00-00-00-000 - US Default'. The 'In-Transit Account' is set to '120200 - Good in Transit'. The 'In-Transit Sub.' is set to 'US-00-00-00-000 - US Default'. The 'Keep Transactions for' is set to '0'. The 'Update GL' checkbox is checked. The 'Post Summary on Updating GL' checkbox is checked. The 'Automatically Post on Release' checkbox is checked. The 'Hold Documents on Entry' checkbox is checked. The 'Validate Document Totals on Entry' checkbox is checked. The 'Add One Unit per Barcode' checkbox is checked. The 'Automatically Add Receipt Line for Barcode' checkbox is checked. The 'Default Reason Code' is set to 'DEFAULT'. The 'Receipt Reason Code' is set to 'INRECEIPT - Direct receipts'. The 'Issue/Return Reason Code' is set to 'INISSUE - Direct issues'. The 'Adjustment Reason Code' is set to 'INADJUST - Direct adjustment'. The 'Physical Inventory Reason Code' is set to 'STOCKADJ - Stocktake adjustment'. The 'Use Tags' checkbox is checked. The 'Last Tag Number' is set to '0'. The 'Turnover Periods per Year' is set to '12'.

Inventory ID and Description fields filled with TSHIRT and Tshirt

Step 3: Verify the default item class and inventory preferences

Notice that the **Item Class** is automatically set to **DEFAULT** based on your inventory preferences. The **Type** field is set to **Finished Good**, the **Valuation Method** to **Average**, and the **Tax Category** to **DEFAULT**.

To review or change these defaults, navigate to **Inventory Preferences** under **SETUP** in the left sidebar. Here, you can view the default item class and other inventory settings.

Inventory Preferences screen showing default item class and other settings

Step 4: Review units of measure

Confirm that the **Base Unit**, **Sales Unit**, and **Purchase Unit** fields are all set to **PC** (piece). These values are populated automatically based on the item class.

Step 5: Select the warehouse and locations

In the **Warehouse Defaults** section, click the lookup icon next to **Default Warehouse** and select the appropriate warehouse from the list (for example, **RETAIL** for the Retail warehouse).

For **Default Issue From** and **Default Receipt To**, click the respective lookup icons and select the desired locations (for example, [R01C01L01](#) and [R01C01L02](#)).

The screenshot shows the Acumatica Inventory Preferences dialog box, General Settings tab. The left sidebar contains a tree view with categories: SETUP (Inventory Preferences, Reason Codes, Posting Classes, Item Price Classes, Physical Inventory Types, Replenishment Seasonality, Replenishment Classes, Boxes), and MANAGE (Warehouses, Item Classes, Item Sales Categories). The main area is divided into several sections:

- NUMBERING SETTINGS:** Includes Batch Numbering Sequence (BATCH - GL Batch), Receipt/Transfer Numbering Sequence (INRECEIPT - IN Receipt), Issue Numbering Sequence (INISSUE - IN Issue), Adjustment Numbering Sequence (INADJUST - IN Adjustment), PI Numbering Sequence (PID - Physical Inventory ID), and Replenishment Numbering Sequence (INREPL - IN Replenishment).
- INVENTORY OPTIONS:** Includes Weight UOM (KG), Volume UOM (LITER), and a checkbox for Replan Back-Orders.
- ACCOUNT SETTINGS:** Includes AR Clearing Account (111000 - AR accrual), AR Clearing Sub. (US-00-00-00-000 - US Default), In-Transit Account (120200 - Good in Transit), and In-Transit Sub. (US-00-00-00-000 - US Default).
- POSTING AND RETENTION SETTINGS:** Includes Keep Transactions for (0), Update GL, Post Summary on Updating GL, and Automatically Post on Release.
- DATA ENTRY SETTINGS:** Includes Hold Documents on Entry, Validate Document Totals on Entry, Add One Unit per Barcode, and Automatically Add Receipt Line for Barcode.
- DEFAULT REASON CODES:** Includes Receipt Reason Code (INRECEIPT - Direct receipts), Issue/Return Reason Code (INISSUE - Direct issues), Adjustment Reason Code (INADJUST - Direct adjustment), and Physical Inventory Reason Code (STOCKADJ - Stocktake adjustment).
- PHYSICAL INVENTORY SETTINGS:** Includes Use Tags, Last Tag Number (0), and Turnover Periods per Year (12).

Warehouse selection dialog with various warehouse options

This screenshot is identical to the one above, showing the Acumatica Inventory Preferences dialog box, General Settings tab. It displays the same configuration options for numbering, inventory, accounting, posting, and physical inventory settings.

Location selection dialog for Default Receipt To

Step 6: Enter price and cost information

Click the **Price/Cost Info** tab. Enter the **Default Price** and any other relevant pricing or cost details as needed.

The screenshot shows the Acumatica interface with the 'Price/Cost Info' tab selected. The 'Inventory ID' is 'TSHIRT' and the 'Item Status' is 'Active'. The 'Description' is 'Tshirt'. The 'General Settings' tab is active, showing 'ITEM DEFAULTS' and 'WAREHOUSE DEFAULTS'. The 'UNIT OF MEASURE' section shows 'Base Unit' as 'PC', 'Sales Unit' as 'PC', and 'Purchase Unit' as 'PC'. The 'Warehouse Defaults' section shows 'Default Warehouse' as 'RETAIL - Retail warehouse', 'Default Issue From' as 'R01C01L01 - Row 1, column 1, level', and 'Default Receipt To' as 'R01C01L02 - Row 1, column 1, level'.

Price/Cost Info tab selected, ready for price entry

Step 7: Associate vendor details (optional)

Click the **Vendor Details** tab, then click the plus (+) icon to add a new vendor. In the **Vendor ID** field, click the lookup icon and select the desired vendor from the list (for example, **ADPSERVICE** for Automatic Data Processing Inc.). Fill in any additional vendor-specific details as required.

The screenshot shows the Acumatica interface with the 'Vendor Details' tab selected. A 'SELECT' dialog box is open, displaying a list of vendors. The 'Vendor' column is highlighted, and the 'ADPSERVICE' vendor is selected. The dialog box also shows 'Vendor Name', 'Address Line 1', 'Address Line 2', and 'Postal Code' for each vendor.

Vendor	Vendor Name	Address Line 1	Address Line 2	Postal Code
ACITASYST	Acit Systems - Computer S...	Leon House	233, High Street	CRO 9X
ADPSERVICE	Automatic Data Processing I...	1 Penn Plaza		10119
AEROCOREBE	Aerocorebe Travel Agency C...	8914 Roosevelt Ave		11372
ARCHODEACES	Data Center Systems Archde...	701 Seminary Ave		10704
ARKTAK	Arktak Networks	1 Kates Way		07662
ASARHARD	Asar HSoftware Limited	999 Penn Place		10001
ASARSOFT	Asar Software Incorporated	111 Penn Plc		10001
ASISASYS	Asisa Systems - Computer S...	322 Loway Street		CRO 9X
ASTDEVELOP	AST Development Ltd	1 AST Street		10001
ATDSECUR	ATD Security Services, Inc.	335 W 16Th St		22801
AVALARA	Avalara Tax Agency			

Vendor selection dialog with a list of vendors and their details

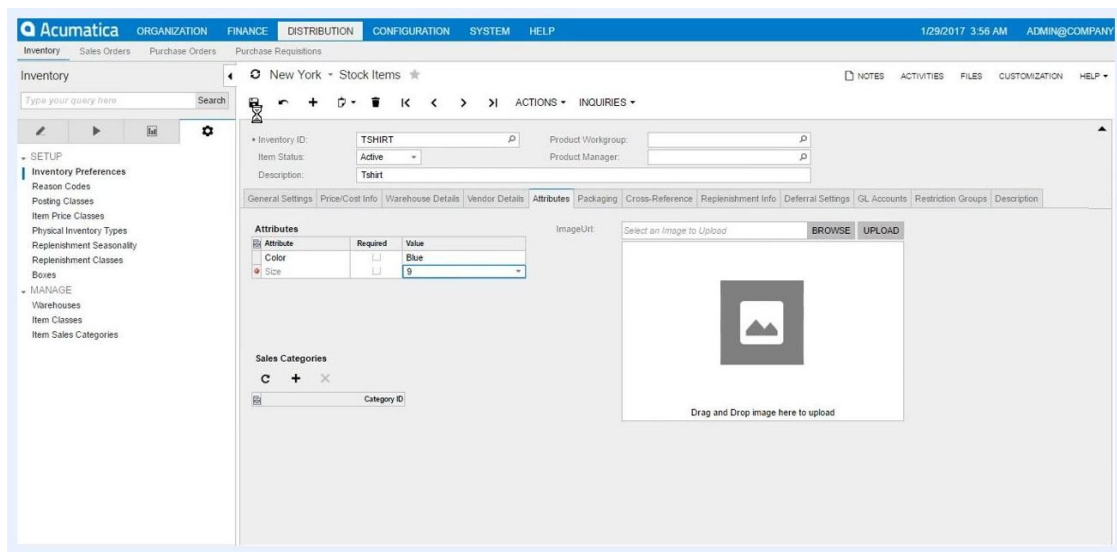
Step 8: Review and select attribute values

Navigate to the **Attributes** tab. Attribute fields such as **Color** and **Size** are auto-populated based on the item class or previous selections.

If needed, manually adjust the attribute values:

- For **Color**, select **Blue**.
- For **Size**, select **9**.

Make sure all required attributes are filled according to your inventory requirements.



The screenshot shows the Acumatica web interface for the 'Attributes' tab of a stock item. The top navigation bar includes 'Inventory', 'Sales Orders', 'Purchase Orders', 'Purchase Requisitions', 'ORGANIZATION', 'FINANCE', 'DISTRIBUTION', 'CONFIGURATION', 'SYSTEM', and 'HELP'. The main header shows 'New York - Stock Items' and a search bar. The left sidebar contains a tree view with 'SETUP' (Inventory Preferences, Reason Codes, Posting Classes, Item Price Classes, Physical Inventory Types, Replenishment Seasonality, Replenishment Classes, Boxes) and 'MANAGE' (Warehouses, Item Classes, Item Sales Categories). The main content area has tabs for 'General Settings', 'Price/Cost Info', 'Warehouse Details', 'Vendor Details', 'Attributes' (selected), 'Packaging', 'Cross-Reference', 'Replenishment Info', 'Deferral Settings', 'GL Accounts', 'Restriction Groups', and 'Description'. The 'Attributes' tab displays a table with columns 'Attribute', 'Required', and 'Value'. The 'Color' attribute is set to 'Blue' and the 'Size' attribute is set to '9'. Below the table, there is a 'Sales Categories' section with a 'C' icon and a 'Category ID' field. To the right of the attributes table is an 'ImageUnit' section with a 'Select an Image to Upload' button, 'BROWSE' and 'UPLOAD' buttons, and a placeholder for an image with the text 'Drag and Drop image here to upload'.

Attributes tab showing Color set to Blue and Size set to 9 for Inventory ID TSHIRT

Step 9: Save the stock item

Click the **Save** button (disk icon) at the top of the screen to finalize the creation of the stock item. Before saving, confirm that all entered details, including attributes, are correct.

Summary

By following these steps, you have successfully created a new stock item in Acumatica, complete with inventory defaults, warehouse assignments, pricing, and optional vendor associations.