



Inventory Management Series
An Overview of Item Types
Microsoft Dynamics® RMS

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Because you sell a wide range of products, Microsoft Dynamics Retail Management System (RMS) offers a wide range of item types. You can use item types to customize your inventory and take advantage of each item type's special features. The item types included in Microsoft Dynamics RMS are Standard, Serialized, Noninventory, Gasoline, Weighed, Voucher, Kit, Assembly, Matrix, and Lot Matrix. In addition, items of any of these types can be marked as Inactive, and all of your inactive items can be managed as a group.

In this article, we'll describe each of the item types and provide real-life examples of how they can be used.

 **Note**

Other articles in this series will explore the details of using each of these item types.

Standard inventory item

Use standard items for products with a basic set of item properties. For example, a hobby shop might have model cement as a standard item, and a book store might use a standard item for each of the books in their inventory. A standard item's properties include the item lookup code, description, price, cost, on-hand quantity, order history, discount and supplier information, and any special options set for the item.

 **Note**

Serialized, noninventory, gasoline, weighed, voucher, and kit items are all standard items. You create a standard item, and then, in the Item Properties window, select the type of item you want. Special properties become available in the window depending on the item type you've selected. Matrix, lot matrix, and assembly items are created separately and have their own property windows.

For more information, see "Adding new items" and "Ringing up items" in Store Operations Online Help.

Serialized item

You can use serialized items for products with serial numbers, such as electronics, cameras, or bicycles. For example, a bike shop might create a serialized item to represent one model of racing bicycle, and then use serial numbers to track sales of individual bikes of that model.

Also, because Microsoft Dynamics RMS supports up to three serial numbers per item, you're not limited in the amount of detail you can include in your recordkeeping. For example, a store selling cell phones could use one serial number for the phone, another for the number of the SIM identification card, and a third for the telephone number.

For more information, see "Handling serialized items" and "Ringing up items" in Store Operations Online Help.

Gasoline item

With gasoline items, you can accept a deposit at the register for gasoline, and then apply the deposit toward the total when the customer finishes pumping gas and pays. For example, suppose you run a convenience store. With Microsoft Dynamics RMS, a customer can pay a deposit that is associated with a specific gas pump number, pump her gas, and then return to the store to purchase additional items, collect her change, or simply receive her receipt. And special three-decimal-place pricing on gasoline items lets you charge accurate prices.

For more information, see "Adding new items," "How to place a deposit on the gas pump," and "How to make a payment towards the gas pump" in Store Operations Online Help.

Weighed item

Use weighed items to sell products by weight. For example, candy stores often sell their stock by the pound. Using weighed items requires using a scale at the register.

For more information, see “Adding new items” in Store Operations Online Help.

Note

Microsoft Dynamics RMS is certified by the National Conference on Weights and Measures.

Voucher item

Simply put, a voucher item is a gift card or gift certificate. You can use voucher items to sell gift cards to your customers, and then later redeem those gift cards as payments at the register.

Voucher items have serial numbers, so you can use a single voucher item to track all of the gift cards sold by your store. Voucher serial numbers are managed just like the serial numbers for serialized items, except for a special “Customer” property to record the name of the customer who purchases the gift card.

For more information, see “Using vouchers,” “How to sell a voucher,” and “How to redeem a voucher” in Store Operations Online Help.

Noninventory item

Many stores sell items that can’t be found on their shelves, such as gift wrapping or engraving, or services such as product assembly, installation, or customization. Noninventory items are perfect for these services. There are no on-hand quantities or suppliers to track, just the cost to the store and the price charged to the customer.

For more information, see “Adding new items” in Store Operations Online Help.

Kit item

A kit item is an item that contains other items already in the store database. For example, a first aid kit might contain a number of component items, such as gauze, scissors, antiseptic, and bandages. The kit has its own price, so it can be used to offer a discount to customers purchasing the whole set of items.

Every time you build a kit, the on-hand quantities of the component items are automatically decreased—those quantities are reserved for sale in kits only—and the on-hand quantity of the kit item is increased. When a cashier sells a kit, a single line item appears in the transaction, and the on-hand quantity for the kit is reduced.

For more information, see “Handling kit items” in Store Operations Online Help.

Assembly item

Assembly items are similar to kit items in that they represent a group of items. For example, a computer store might sell an assembly item that consists of a monitor, a CPU, a keyboard, a mouse, and a printer. When the cashier sells the assembly item, each component item appears as a line item in the transaction. This allows for flexibility since component items can be added or removed at the time of sale. (With a kit item, the component items cannot be changed at the time of sale, so kits are more appropriate for items that are always sold in fixed groups.)

Unlike kit items, assembly items don’t have their own prices; the price of the assembly item is the sum of the component prices. Also, because the assembly item isn’t “built” until the time of sale, the on-hand quantities of the component items aren’t reduced until then, and the component items remain available for individual sale.

For more information, see “Assembly items” and “Using assembly items” in Store Operations Online Help.

Matrix item

A matrix item is an item that is sold in a variety of styles, colors, sizes, or models. For example, a t-shirt might come in four sizes and three colors, but it is essentially one item. The matrix items in Microsoft Dynamics RMS are managed as individual items, but you also have access to detailed inventory information, so you always know, for example, how many large, green t-shirts are in stock.

The details of a matrix item are called its dimensions. If you find yourself using the same dimensions over and over again (for example, Small, Medium, and Large), you can save those dimensions in a dimension set that you can use whenever you need to create a new, similar matrix item.

For more information, see “Using matrix items” in Store Operations Online Help.

Lot matrix item

A lot matrix item is an item that is sold by lots, with each lot containing a different quantity of the same product. For example, a candle shop might sell tapers individually, in a box of twelve, or in a case of 144. Each lot can be offered with a different per-candle price, and the store owner can view the on-hand quantities for a particular candle all in one place, regardless of lot packaging.

For more information, see “Using lot matrix items” in Store Operations Online Help.

Inactive item

When a product is no longer available, such as a clothing style that has been discontinued or a book that is out of print, or when you simply decide to stop carrying a product, it can be tempting to delete the corresponding item in Microsoft Dynamics RMS. This is not always the best practice, though, because deleting an item that has already been sold can compromise the records of your sales transactions. Instead, you can mark the item as inactive. Inactive items are hidden from cashiers and excluded from reports and purchasing (unless you want them to be included).

With Microsoft Dynamics RMS reports, you can manage your inactive items as a group. Use a simple filter to generate a report about the inactive items, and then use the magnifying glass tool to quickly “drill down” to detailed properties for the items in the report.

For more information, see “Deleting items and making items inactive” and “Directly accessing database information” in Store Operations Online Help.

What’s Next

The next article in this series is Using Standard Items. It goes into more detail about creating and selling standard, serialized, noninventory, gasoline, weighed, voucher, and kit items. Other articles will cover matrix, lot matrix, and assembly items.