

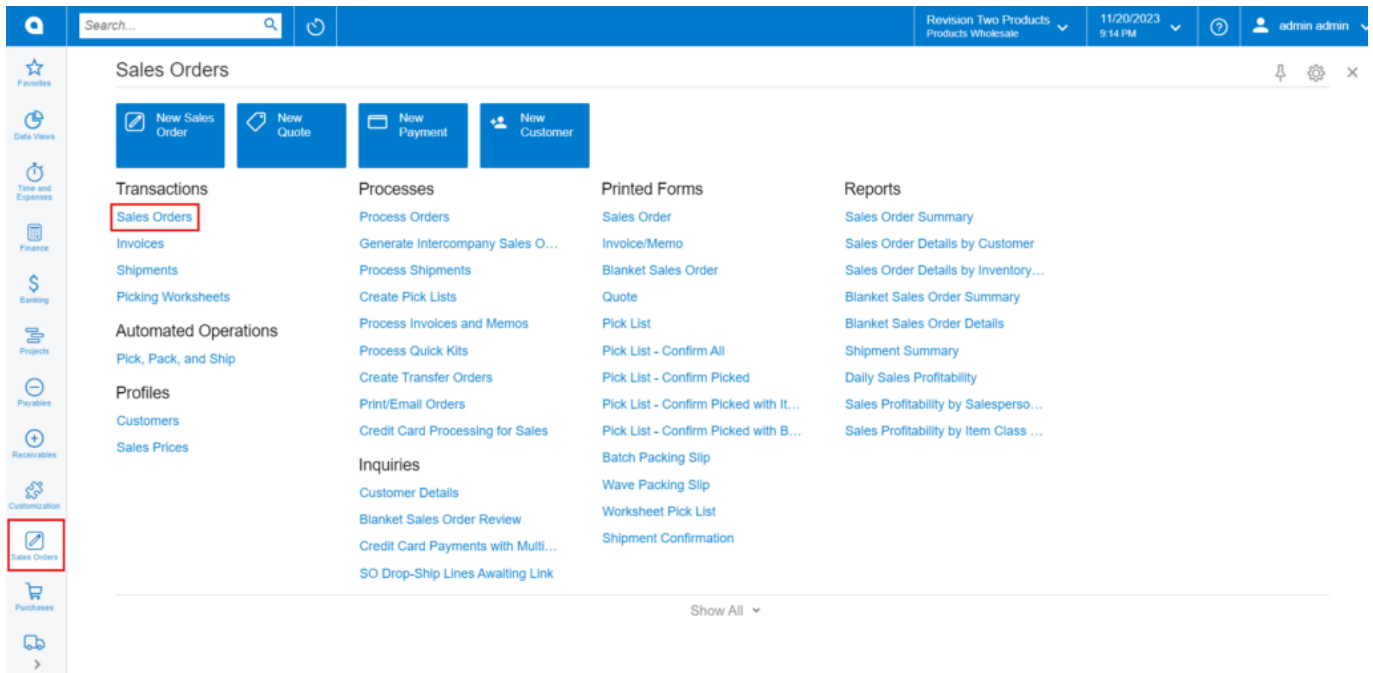
Sales Orders



- You must navigate to the left panel of Acumatica and click on **[Sales Orders]** and then click on **[Sales Orders]** under **[Transactions]**.

Sales Orders

- Click on the **[+]** icon, then you will be redirected to the Sales Orders screen.
- You need to search for **[Customer]**.
- Click on **[+]** icon under **[Details]** and search for the created **[Inventory ID]**.
- Enter the **[Quantity]**.
- Upon entering the **[Quantity]** the free item will auto be populated on the screen.
- Click on **[Save]**.



The screenshot displays the Acumatica Sales Orders screen. The top navigation bar includes a search field, a refresh icon, and user information. The left sidebar contains various icons, with the 'Sales Orders' icon highlighted by a red box. The main content area features a 'Sales Orders' header and four tabs: Transactions, Processes, Printed Forms, and Reports. The 'Transactions' tab is active, showing a list of sales orders. The 'Sales Orders' option under 'Transactions' is highlighted with a red box. The 'Sales Orders' option in the left sidebar is also highlighted with a red box.

Sales Orders

Acumatica

Search

Revision Two Products Products Wholesale 11/16/2023 11:36 PM admin admin

NOTES ACTIVITIES FILES CUSTOMIZATION TOOLS

Sales Orders
SO - Alta Ace test

QUICK PROCESS CREATE SHIPMENT HOLD

Order Type: SO Customer: AACUSTOMER - Alta Ace test Ordered Qty: 2.00
Order Nbr: <NEW> Location: MAIN - Primary Location Discount Total: 0.00
Status: Open Contact: Amelia Armstrong VAT Exempt T.: 0.00
Date: 11/16/2023 Currency: USD 1.00 VIEW BASE VAT Taxable T.: 0.00
Requested On: 11/16/2023 Project: X - Non-Project Code Tax Total: 0.00
Customer Ord.: Order Total: 100.00
External Refer.: Description:

DETAILS TAXES COMMISSIONS FINANCIAL SHIPPING ADDRESSES DISCOUNTS SHIPMENTS PAYMENTS RELATIONS TOTALS

ADD BLANKET SO LINE LINE DETAILS ADD INVOICE LINE ITEM ENHANCEMENT ADD ITEMS ADD MATRIX ITEMS PO LINK

Branch	Inventory ID	Related Item	Substitutable	Free Item	Create Kit Assembly	Warehouse	Line Description	UOM	Quantity	Qty. On Hand	Price	Ext. Price
PRODWHOLE	CHAIR					RETAIL	Chair	EA	1.00	0.00	100.00	100.00
PRODWHOLE	A4LEGO500					RETAIL	Lego 500 piece set- Free Item for CHAIR	EA	1.00	0.00	0.00	0.00

Upon entering the quantity the free fee item will display automatically under the parent item.

Sales Orders

- You can see that free item Quantity is not editable but if the **[Can Define Qty]** is enabled under **[Free Items]**, you can edit the quantity in sales orders screen.

Search...

Revision Two Products

Products Wholesale

11/20/2023

10:40 PM

ads

Recoverables

Customization

Sales Orders

Purchases

Inventory

Payroll

Dashboards

Commerce Connector

Kennium License

Commerce Pro

CHAIR - Chair

NOTES ACTIVITIES FILES CUSTOMIZATION TOOLS

Inventory ID: CHAIR - Chair

Product Workgroup:

Item Status: Active

Product Manager:

Description: Chair

GENERAL PRICE/COST WAREHOUSES S3 IMAGES VENDORS ATTRIBUTES MERCHANDISE PACKAGING CROSS-REFERENCE RELATED ITEMS REPLENISHMENT DEFERRAL

RELATED ITEMS

Relation	Rank	Tag	Inventory ID	Description	UOM	Quantity	Effective Date	Expiration Date	Customer Approval Not Needed	Required	Active
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FREE ITEMS

Inventory ID	Order Type(s)	Activ	Can Defin Qty	Quantity	Avail Qty	Start Date	End Date	Current Price	Reason Code
AALEGO500	SO - Sales Order			1.00	2,400.00	11/16/2023	11/20/2023	100.00	

Stock Items Figure: Sales Orders

- Upon enabling the check box, you can edit the quantity for free item.

Acumatica

Search...

Home

Refresh

Revision Two Products

Products Wholesale

11/16/2023

11:39 PM

admin admin

NOTES

ACTIVITIES

FILES

CUSTOMIZATION

TOOLS

Home

Customer Service

Sales Orders

SO SO006962 - Alta Ace test

QUICK PROCESS

CREATE SHIPMENT

HOLD

...

Order Type: SO

Order Nbr.: SO006962

Status: Open

Date: 11/16/2023

Requested On: 11/16/2023

Customer Ord.:

External Refr:

Customer: AACUSTOMER - Alta Ace test

Location: MAIN - Primary Location

Contact: Amelia Armstrong

Currency: USD 1.00

Project: X - Non-Project Code

Description:

Ordered Qty: 12.00

Discount Total: 0.00

VAT Exempt T.: 0.00

VAT Taxable T.: 0.00

Tax Total: 0.00

Order Total: 500.00

DETAILS

TAXES

COMMISSIONS

FINANCIAL

SHIPPING

ADDRESSES

DISCOUNTS

SHIPMENTS

PAYMENTS

RELATIONS

TOTALS

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ADD BLANK SO LINE

LINE DETAILS

ADD INVOICE

LINE ITEM ENHANCEMENT

ADD ITEMS

ADD MATRIX ITEMS

PD LINK

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Branch

Inventory ID

Related Items

Substitute Required

Free Item

Create Kit Assembly

Warehouse

Line Description

UOM

Quantity

Qty. On Shipments

Open Qty.

Unit Price

Manual Price

Ext. Price

PRODWHOLE

CHAIR

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RETAIL

Chair

EA

1.00

0.00

1.00

100.00

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100.00

PRODWHOLE

AALEGO500

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RETAIL

Lego 500 piece set- Free Item for CHAIR

EA

1.00

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PRODWHOLE

CHAIR

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RETAIL

Chair

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PRODWHOLE

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RETAIL

Lego 500 piece set- Free Item for CHAIR

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2.00

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PRODWHOLE

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RETAIL

Lego 500 piece set- Free Item for CHAIR

EA

1.00

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PRODWHOLE

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RETAIL

Chair

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PRODWHOLE

AALEGO500

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RETAIL

Lego 500 piece set- Free Item for CHAIR

EA

3.00

0.00

3.00

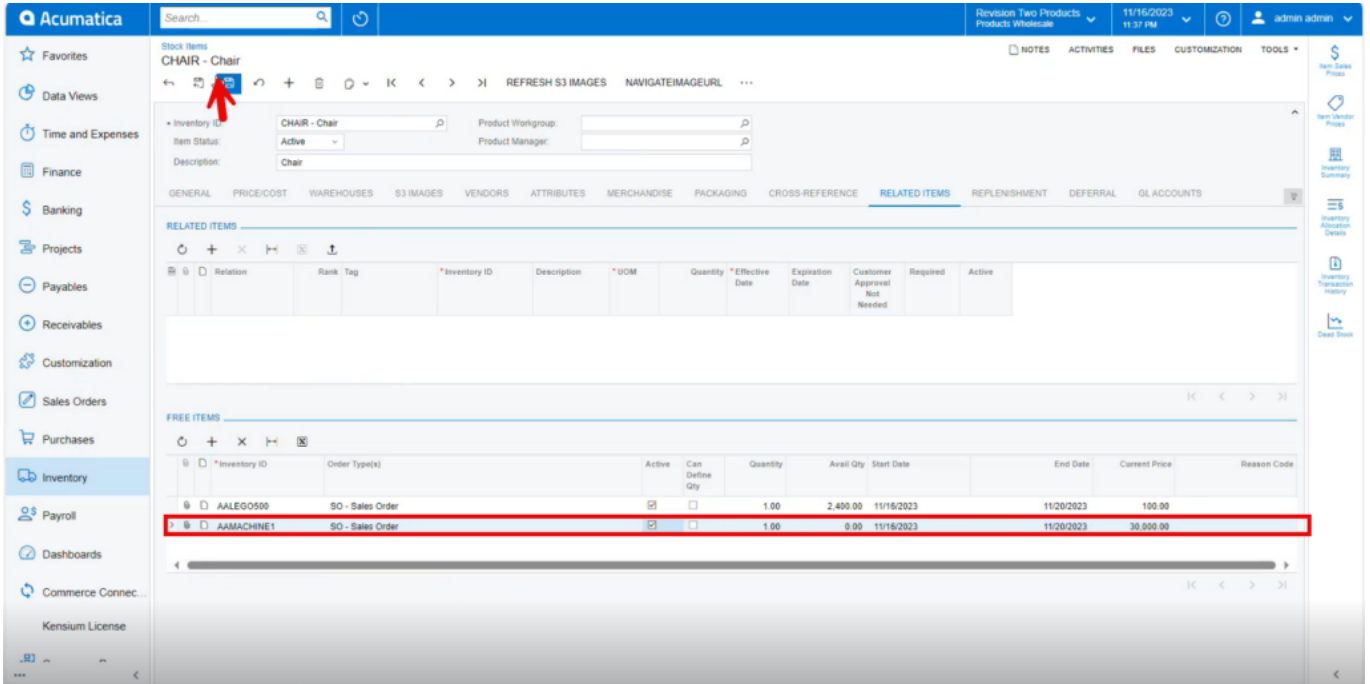
0.00

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0.00

Sales Orders

- ✖ You can also add multiple free items for specific stock items under **[Related Items]**.
- If you add multiple free items for stock items, alternate items will be replaced when the free item does not have quantity available in the warehouse.



The screenshot shows the Acumatica interface for a stock item named 'CHAIR - Chair'. The 'RELATED ITEMS' tab is selected, displaying a table with two items. The second item, 'AAMACHNE1', is highlighted with a red box, indicating it is a free item. The 'FREE ITEMS' tab is also visible below the 'RELATED ITEMS' tab.

Inventory ID	Order Type(s)	Active	Can Define Qty	Quantity	Avail Qty	Start Date	End Date	Current Price	Reason Code
AAL00000	SO - Sales Order	<input checked="" type="checkbox"/>	<input type="checkbox"/>	1.00	2,400.00	11/16/2023	11/20/2023	100.00	
AAMACHNE1	SO - Sales Order	<input checked="" type="checkbox"/>	<input type="checkbox"/>	1.00	0.00	11/16/2023	11/20/2023	30,000.00	

Sales Orders

Note: The **[Active]** checkbox needs to be activated for the free item to display in the stock items screen.

- Free Item is added only if the stock items quantity is selected.
- Deleting the parent item will delete the free item automatically.
- Deleting the free item alone will delete only free item.***