**Job Aids**

Warehouse Manager 2021 R2

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# Managing Warehouses

This chapter contains instructions related to managing warehouses in Acumatica ERP.

## To Create a Warehouse

1. Open the [*Warehouses*](https://help-2021r2.acumatica.com/Help?ScreenId=ShowWiki&pageid=264b0ef7-2b6c-40b4-a7d9-f1a5e067939b) (IN204000) form.

To open the form for creating a new record, type the form ID in the Search box, and on the Search form, point at the form title and click **New** right of the title.

1. On the form toolbar, click **Add New Record**.
2. In the **Warehouse ID** box, type the unique identifier to be used for the warehouse.
3. If your company uses multiple branches, in the **Branch** box, select the branch to which the warehouse will belong.
4. Make sure that the **Active** check box is selected.
5. If needed, in the **Description** box, type a brief description of the warehouse.
6. If needed, on the **GL Accounts** tab, select warehouse-specific general ledger accounts and subaccounts.
7. In the **Country** box of the **Address** tab, select the country where the warehouse is located.
8. If needed, on the **Address** tab, enter information about the company and the detailed address of the warehouse.
9. On the form toolbar, click **Save**.

## To Create a Warehouse Location

1. Open the [*Warehouses*](https://help-2021r2.acumatica.com/Help?ScreenId=ShowWiki&pageid=264b0ef7-2b6c-40b4-a7d9-f1a5e067939b) (IN204000) form.

To open the form for creating a new record, type the form ID in the Search box, and on the Search form, point at the form title and click **New** right of the title.

1. On the form toolbar, click **Add New Record**.
2. In the **Warehouse ID** box, select the warehouse for which you want to create a location.
3. On the **Locations** tab, do the following for each location you need to create in the selected warehouse:
   1. On the table toolbar of the **Location Table**, click **Add Row**.
   2. In the **Location ID** column of the added row, type the unique location identifier to be used for this location.
   3. If needed, in the **Description** column, type a brief description of the location that will help users identify it.
   4. Make sure that the **Active** check box is selected.
   5. In the other columns, check the default location settings and change them if needed.
4. On the form toolbar, click **Save** to save your changes.

## To Use Warehouse General Ledger Accounts and Subaccounts in a Posting Class

1. Open the [*Warehouses*](https://help-2021r2.acumatica.com/Help?ScreenId=ShowWiki&pageid=264b0ef7-2b6c-40b4-a7d9-f1a5e067939b) (IN204000) form.

To open the form for creating a new record, type the form ID in the Search box, and on the Search form, point at the form title and click **New** right of the title.

1. On the form toolbar, click **Add New Record**.
2. On the form, do the following:
   1. In the **Warehouse ID** box, select warehouse that you will use as a source of accounts and subaccounts for a posting class.
   2. On the **GL Accounts** tab, specify the accounts and subaccounts that the system should use from the warehouse in the posting class.
   3. On the form toolbar, click **Save** to save your changes.
3. Open the [*Posting Classes*](https://help-2021r2.acumatica.com/Help?ScreenId=ShowWiki&pageid=edd4bd77-13f5-4e89-9e47-2861fc66bbb0) (IN206000) form.
4. In the **Class ID** box of the Summary area, select a posting class for which you want to specify a warehouse as a source of general ledger accounts and subaccounts.
5. On the **General** tab, select *Warehouse* in each box related to an entity for which you want to use general ledger accounts and subaccounts from the warehouse (such as the **Use Inventory/ Accrual Account from** box).
6. On the form toolbar, click **Save** to save your changes.

# Configuring Basic Inventory

This chapter contains instructions related to configuring basic inventory in Acumatica ERP.

## To Specify Basic Inventory Preferences

1. Open the [*Inventory Preferences*](https://help-2021r2.acumatica.com/Help?ScreenId=ShowWiki&pageid=f2eb4e55-f802-4259-a41f-609965c856f1) (IN101000) form.
2. In the **Numbering Settings** section of the **General** tab, make sure that the needed numbering sequence for each transaction type is selected.
3. In the **AR Clearing Account** box of the **Account Settings** section, select the general ledger account to be used as the AR clearing account for inventory issues (of the *Invoice*, *Debit Memo*, and *Credit Memo* types) that are not yet associated with any customer.
4. If needed, in the **Posting Settings** section, specify the following:
   1. Select the **Update GL** check box to automatically generate the general ledger transactions when users release inventory entries.
   2. Select the **Post Summary on Updating GL** check box to post the batches with summary data (totaled for each account and subaccount pair) to the general ledger.
   3. Select the **Automatically Post on Release** check box to release and immediately post the batch of journal transactions that has been generated on release of an inventory documents.
5. In the **Default Reason Codes** section of the **General** tab, specify the default reason codes to be used for receipts, issues, adjustments, and physical inventory documents.
6. On the form toolbar, click **Save** to save your changes.

# Configuring Physical Inventory

This chapter contains instructions related to configuration of physical inventory in Acumatica ERP.

## To Create a PI Type for Full Count

1. Open the [*Physical Inventory Types*](https://help-2021r2.acumatica.com/Help?ScreenId=ShowWiki&pageid=b83fc037-f166-499e-8a32-cbb560e91ee5) (IN208900) form.

To open the form for creating a new record, type the form ID in the Search box, and on the Search form, point at the form title and click **New** right of the title.

1. On the form toolbar, click **Add New Record**.
2. In the **Type ID** box of the Summary area, type the unique identifier for the new physical inventory type.
3. In the **Description** box, type a brief description indicating that this is the full count.
4. In the **Generation Method** box, select *Full Physical Inventory*.
5. If needed, select the **Hide Book Qty. on PI Count** check box to hide the **Book Qty.** column on the [*Physical Inventory Count*](https://help-2021r2.acumatica.com/Help?ScreenId=ShowWiki&pageid=6982851e-9f5f-44f2-afa2-490b1cf23c11)(IN305010) form.
6. If needed, on the **Warehouse/Location Selection** tab, specify the warehouse where the full count should be performed.
7. On the **Assignment Order** tab, do the following:
   1. In the numerated boxes, select entities for the assignment order to be used on the count sheets.
   2. If needed, in the **Blank Lines to Append** box, specify the number of blank lines to add to the count sheets.
8. On the form toolbar, click **Save**.

## To Create PI Cycles

1. Open the [*Physical Inventory Cycles*](https://help-2021r2.acumatica.com/Help?ScreenId=ShowWiki&pageid=bbacc11f-a3a9-41f9-adaf-d507371eaab2) (IN208700) form.

To open the form for creating a new record, type the form ID in the Search box, and on the Search form, point at the form title and click **New** right of the title.

1. On the form toolbar, click **Add Row**.
2. In the **Cycle ID** column, type the unique identifier for the new cycle.
3. In the **Description** column, type a brief description.
4. In the **Counts Per Year** column, enter the integer indicating how many times in a year the items of the cycle should be counted.
5. On the form toolbar, click **Save**.
6. Repeat the previous five steps for each cycle you want to create.

## To Assign Stock Items to PI Cycles

1. Open the [*Stock Items*](https://help-2021r2.acumatica.com/Help?ScreenId=ShowWiki&pageid=77786a70-1f1e-4d63-ad98-96f98e4fcb0e) (IN202500) form.
2. Select the stock item by its inventory ID.
3. In the **Physical Inventory** section of the **General** tab, in the **PI Cycle** box, select the appropriate physical inventory cycle.
4. On the form toolbar, click **Save**.

## To Create PI Types for Cycles

1. Open the [*Physical Inventory Types*](https://help-2021r2.acumatica.com/Help?ScreenId=ShowWiki&pageid=b83fc037-f166-499e-8a32-cbb560e91ee5) (IN208900) form.

To open the form for creating a new record, type the form ID in the Search box, and on the Search form, point at the form title and click **New** right of the title.

1. On the form toolbar, click **Add New Record**.
2. In the **Type ID** box of the Summary area, type the unique identifier for the new physical inventory type.
3. In the **Description** box, type a brief description.
4. In the **Generation Method** box, select *By Cycle*. The **PI Cycle Selection** tab appears on the form.
5. If needed, select the **Include Items with Zero Book Quantity in PI** check box to include items with a zero book quantity in the count.
6. If needed, select the **Hide Book Qty. on PI Count** check box to hide the **Book Qty.** column on the [*Physical Inventory Count*](https://help-2021r2.acumatica.com/Help?ScreenId=ShowWiki&pageid=6982851e-9f5f-44f2-afa2-490b1cf23c11) (IN305010) form.
7. In the **Cycle ID** box of the **PI Cycle Selection** tab, select an appropriate PI cycle.
8. On the **Assignment Order** tab, specify the following:
   1. In the numerated boxes, select the entities for the assignment order to be used on the count sheets.
   2. If needed, in the **Blank Lines to Append** box, specify the number of blank lines to be added to the count sheets.
9. On the form toolbar, click **Save**.

## To Create a PI Type for Cycle Counts by Frequency

1. Open the [*Physical Inventory Types*](https://help-2021r2.acumatica.com/Help?ScreenId=ShowWiki&pageid=b83fc037-f166-499e-8a32-cbb560e91ee5) (IN208900) form.

To open the form for creating a new record, type the form ID in the Search box, and on the Search form, point at the form title and click **New** right of the title.

1. On the form toolbar, click **Add New Record**.
2. In the **Type ID** box, type the unique identifier for the new physical inventory type.
3. In the **Description** box, type a brief description.
4. In the **Generation Method** box, select *By Cycle*. The **PI Cycle Selection** tab appears on the form.
5. If needed, select the **Include Items with Zero Book Quantity in PI** check box to include items with a zero book quantity in the count.
6. If needed, select the **Hide Book Qty. on PI Count** check box to hide the **Book Qty.** column on the [*Physical Inventory Count*](https://help-2021r2.acumatica.com/Help?ScreenId=ShowWiki&pageid=6982851e-9f5f-44f2-afa2-490b1cf23c11) (IN305010) form.
7. On the **PI Cycle Selection** tab, select the **By Frequency** check box.
8. On the **Assignment Order** tab, do the following:
   1. In the numerated boxes, select entities for the assignment order to be used on the count sheets.
   2. If needed, in the **Blank Lines to Append** box, specify the number of blank lines to be added to the count sheets.
9. On the form toolbar, click **Save**.

## To Create ABC Codes

1. Open the [*ABC Codes*](https://help-2021r2.acumatica.com/Help?ScreenId=ShowWiki&pageid=ba7d497b-c063-4748-b837-c3c5a81d8a4d) (IN208500) form.
2. On the table toolbar, click **Add Row**.
3. In the **ABC Code** column, specify the code identifier.
4. In the **Description** column, specify a brief description of the code.
5. In the **Counts per Year** column, specify the number of physical inventory counts during the year.
6. In the **ABC Code %** column, specify the threshold value (%) of the criteria to be used to assign the inventory items to this code.
7. On the form toolbar, click **Save**.
8. Repeat the previous steps for each ABC code you want to create in the system. In the **Total ABC Code %** column, make sure that the threshold for all ABC codes adds up to 100%.

## To Assign ABC Codes to Stock Items

1. Open the [*Stock Items*](https://help-2021r2.acumatica.com/Help?ScreenId=ShowWiki&pageid=77786a70-1f1e-4d63-ad98-96f98e4fcb0e) (IN202500) form.
2. In the **Inventory ID** box, select the stock item to which you are assigning the ABC code.
3. In the **Physical Inventory** section of the **General** tab, do the following:
   1. In the **ABC Code** box, select the ABC code that will be assigned to the selected stock item.
   2. If needed, select the **Fixed ABC Code** check box to indicate that the ABC code should not be updated automatically.
4. On the form toolbar, click **Save**.

## To Create PI Types for ABC Codes

1. Open the [*Physical Inventory Types*](https://help-2021r2.acumatica.com/Help?ScreenId=ShowWiki&pageid=b83fc037-f166-499e-8a32-cbb560e91ee5) (IN208900) form.

To open the form for creating a new record, type the form ID in the Search box, and on the Search form, point at the form title and click **New** right of the title.

1. On the form toolbar, click **Add New Record**.
2. In the **Type ID** box, type the unique identifier for the new physical inventory type.
3. In the **Description** box, type a brief description.
4. In the **Generation Method** box, select *By ABC Code*. The **ABC Code Selection** tab appears on the form.
5. If needed, select the **Include Items with Zero Book Quantity in PI** check box to include items with a zero book quantity in the count.
6. If needed, select the **Hide Book Qty. on PI Count** check box to hide the **Book Qty.** column on the [*Physical Inventory Count*](https://help-2021r2.acumatica.com/Help?ScreenId=ShowWiki&pageid=6982851e-9f5f-44f2-afa2-490b1cf23c11) (IN305010) form.
7. On the **ABC Code Selection** tab, select the appropriate ABC code in the **ABC Code** box.
8. On the **Assignment Order** tab, do the following:
   1. In the numerated boxes, select entities for the assignment order to be used on the count sheets.
   2. If needed, in the **Blank Lines to Append** box, specify the number of blank lines to be added to the count sheets.
9. On the form toolbar, click **Save**.

## To Create a PI Type for Counts by Frequency in ABC Code

1. Open the [*Physical Inventory Types*](https://help-2021r2.acumatica.com/Help?ScreenId=ShowWiki&pageid=b83fc037-f166-499e-8a32-cbb560e91ee5) (IN208900) form.

To open the form for creating a new record, type the form ID in the Search box, and on the Search form, point at the form title and click **New** right of the title.

1. On the form toolbar, click **Add New Record**.
2. In the **Type ID** box, type the unique identifier for the new physical inventory type.
3. In the **Description** box, type a brief description.
4. In the **Generation Method** box, select *By ABC Code*. The **ABC Code Selection** tab appears on the form.
5. If needed, select the **Include Items with Zero Book Quantity in PI** check box to include items with a zero book quantity in the count.
6. If needed, select the **Hide Book Qty. on PI Count** check box to hide the **Book Qty.** column on the [*Physical Inventory Count*](https://help-2021r2.acumatica.com/Help?ScreenId=ShowWiki&pageid=6982851e-9f5f-44f2-afa2-490b1cf23c11) (IN305010) form.
7. On the **ABC Code Selection** tab, select the **By Frequency** check box.
8. On the **Assignment Order** tab, do the following:
   1. In the numerated boxes, select entities for the assignment order to be used on the count sheets.
   2. If needed, in the **Blank Lines to Append** box, specify the number of blank lines to be added to the count sheets.
9. On the form toolbar, click **Save**.

# Preparing a Physical Inventory

This chapter contains instructions related to preparation of physical inventory.

## To Prepare a Physical Inventory Count

1. Open the [*Prepare Physical Count*](https://help-2021r2.acumatica.com/Help?ScreenId=ShowWiki&pageid=cbdb2f15-9394-4d09-b1fb-d54a9920938b) (IN504000) form.
2. In the **Type ID** box of the **Preview** tab, select the appropriate physical inventory type for counting.
3. If the **Warehouse** box is not filled in, select the warehouse in which the count should be performed. You can select a particular warehouse only if the physical inventory type is not intended for a particular warehouse.
4. On the form toolbar, click **Generate PI**.

The system generates the physical inventory document and opens it on the [*Physical Inventory*](https://help-2021r2.acumatica.com/Help?ScreenId=ShowWiki&pageid=4e2e9fa0-10d3-4a00-9964-8718672e10b2)[*Review*](https://help-2021r2.acumatica.com/Help?ScreenId=ShowWiki&pageid=4e2e9fa0-10d3-4a00-9964-8718672e10b2) (IN305000) form. Review the list of items to be counted, and edit the list, if needed.

1. On the form toolbar, click **Save**.

## To Export a Count Sheet to an Excel Spreadsheet

1. Open the [*Physical Inventory Review*](https://help-2021r2.acumatica.com/Help?ScreenId=ShowWiki&pageid=4e2e9fa0-10d3-4a00-9964-8718672e10b2) (IN305000) form.
2. In the **Reference Nbr.** box of the Summary area, select the identifier of the required physical inventory document.
3. Make sure that the physical inventory document has the *Counting in Progress* status.
4. On the table toolbar of the **Physical Inventory Details** tab, click **Export to Excel**.
5. Open the downloaded file and review its contents.

## To Print Count Sheets

1. Open the [*Physical Count Sheets*](https://help-2021r2.acumatica.com/Help?ScreenId=ShowWiki&pageid=9c247090-09ad-4ef0-837c-b6bdda9a6749) (IN620500) report.
2. In the **Reference Nbr.** box of the **Report Parameters** tab, select the reference number of the physical inventory count.
3. On the report form toolbar, click **Run Report**. The system opens the printable version of the count sheet.
4. On the report toolbar, click **Print** to print as many copies of the count sheet as you need.

## To Print Tags

1. Open the [*Physical Count Tags*](https://help-2021r2.acumatica.com/Help?ScreenId=ShowWiki&pageid=c7bebc82-f45c-417b-ba77-634203111916) (IN621000) report.
2. In the **Reference Nbr.** box of the **Report Parameters** tab, select the reference number of the physical inventory count.
3. On the report form toolbar, click **Run Report**.
4. On the report toolbar, click **Print** to print the tags.

# Preparing Inventory to Closing Periods

This chapter contains instructions related to preparation of closing periods in inventory.

## To Review Unprocessed Inventory Transactions

1. Open the [*Close Financial Periods*](https://help-2021r2.acumatica.com/Help?ScreenId=ShowWiki&pageid=e50ee1c8-7500-427f-a1b6-d2bf564f54a5) (IN509000) form.
2. In the unlabeled column, select the check boxes in the rows of the financial periods for which you want to review financial transactions.
3. On the form toolbar, click **Unreleased Documents**.
4. In the [*Unreleased IN Documents*](https://help-2021r2.acumatica.com/Help?ScreenId=ShowWiki&pageid=23bcc83d-cc1c-4cce-8a69-92fb026894b7) (IN656600) report, which opens, check whether there are any documents with the *On Hold* or *Balanced* status.
5. For each unreleased document, do the following:
   1. In the **Ref. Nbr.** column, click the link to open the document on the [*Receipts*](https://help-2021r2.acumatica.com/Help?ScreenId=ShowWiki&pageid=d6ecad5b-155f-44bf-baba-9ed006d298b5) (IN301000) form.
   2. Do one of the following:
      * Release the document if it is ready to be released.
      * Delete the document if it is no longer needed.
      * Change the post period for the document if the document will be processed in a later period.
6. After you have processed all the transactions, do the following:
   1. In the unlabeled column, select the check boxes in the rows of the same financial periods.
   2. Click **Unreleased Documents**.
   3. Make sure that the [*Unreleased IN Documents*](https://help-2021r2.acumatica.com/Help?ScreenId=ShowWiki&pageid=23bcc83d-cc1c-4cce-8a69-92fb026894b7) report is empty.

# Configuring Replenishment of Inventory Items

This chapter contains instructions related to configuration of replenishment of inventory items.

## To Create a Replenishment Class

1. Open the [*Replenishment Classes*](https://help-2021r2.acumatica.com/Help?ScreenId=ShowWiki&pageid=bd28e119-db72-4659-bded-292a0b072620) (IN208800) form.
2. On the form toolbar, click **Add Row**.
3. In the **Class ID** column, type the unique identifier to be used for the replenishment class.
4. In the **Description** column, type a brief description of the class.
5. In the **Replenishment Source** column, select the source of replenishment that will be used with this class.
6. On the form toolbar, click **Save**.

## To Create a Replenishment Seasonality

1. Open the [*Replenishment Seasonality*](https://help-2021r2.acumatica.com/Help?ScreenId=ShowWiki&pageid=3e6270b0-6f43-42b3-9e20-a03a1ab75a9c) (IN206600) form.

To open the form for creating a new record, type the form ID in the Search box, and on the Search form, point at the form title and click **New** right of the title.

1. On the form toolbar, click **Add New Record**.
2. In the **Seasonality ID** box, type the unique identifier to be used for the seasonality.
3. In the **Description** box, type a brief description of the seasonality.
4. In the **Calendar** box, select the calendar that will be used for determining low seasons and for gathering sales statistics.
5. In the table, do the following for each date range that you want to include in the current seasonality:
   1. On the table toolbar, click **Add Row**.
   2. In the **Season Start Date** column, type or select the date when the season starts.
   3. In the **Season End Date** column, type or select the date when the season ends.
   4. In the **Factor** column, type the coefficient that the system will use to reduce or increase item replenishment quantity between the start and end dates.
6. On the form toolbar, click **Save**.

## To Assign a Replenishment Class to a Warehouse

1. Open the [*Warehouses*](https://help-2021r2.acumatica.com/Help?ScreenId=ShowWiki&pageid=264b0ef7-2b6c-40b4-a7d9-f1a5e067939b) (IN204000) form.
2. In the **Warehouse ID** box, select the warehouse for which you want to specify a replenishment class.
3. In the **Replenishment Class** box, select the replenishment class you want to assign to the selected warehouse.
4. On the form toolbar, click **Save**.

## To Set Up Replenishment for an Item Class

1. Open the [*Item Classes*](https://help-2021r2.acumatica.com/Help?ScreenId=ShowWiki&pageid=80a3301b-4eb2-4ce2-94c5-0407c786a0f1) (IN201000) form.
2. In the **Class ID** box, select the item class for which you want to set up replenishment.
3. On the **Replenishment** tab, in the **Demand Calculation** box, select the *Item Class Settings* option if you want the system to calculate the demand based on the availability calculation rule specified for this item class. Otherwise, select *Hard Demand Only*.
4. In the table on this tab, do the following for each replenishment class you want to assign to the item class:
   1. On the table toolbar, click **Add Row**.
   2. In the **Replenishment Class ID** column, select the replenishment class you want to assign to the selected item class.
   3. In the **Seasonality** box, select the seasonality to assign to the item class with the selected replenishment class.
   4. In the **Source** box, select the source of replenishment to be used for the item class.
   5. In the **Method** column, select the method of replenishment to be used for the item class with the selected replenishment class.
   6. In the **Replenishment Warehouse** box, select the warehouse to be used as a source of items of the class with the selected replenishment class.
5. On the form toolbar, click **Save**.

## To Set Up Replenishment for a Stock Item

1. Open the [*Stock Items*](https://help-2021r2.acumatica.com/Help?ScreenId=ShowWiki&pageid=77786a70-1f1e-4d63-ad98-96f98e4fcb0e) (IN202500) form.
2. In the **Inventory ID** box, select the stock item for which you want to configure replenishment settings.
3. On the **Replenishment** tab, do the following for each replenishment class you want to assign to the item:
   1. On the table toolbar, click **Add Row**.
   2. In the **Repl. Class** column, select the replenishment class you want to assign to the stock item.
   3. In the **Seasonality** column, select the seasonality for the stock item.
   4. In the **Source** box, select the source of replenishment to be used for the item class.
   5. In the **Method** box, select the replenishment method to be applied to the stock item.
4. On the **Vendors** tab, make sure that the vendors from which the stock item should be purchased have been added and that the vendors are active.
5. On the form toolbar, click **Save**.

## To Set Up Warehouse-Specific Replenishment Settings for a Stock Item

1. Open the [*Item Warehouse Details*](https://help-2021r2.acumatica.com/Help?ScreenId=ShowWiki&pageid=ae2418af-7f53-4c09-8766-556452d8f8b8) (IN204500) form.
2. In the **Inventory ID** box, select the stock item for which you want to specify replenishment settings.
3. In the **Warehouse** box, select the warehouse.
4. On the **Replenishment** tab, do the following:
   1. In the **Replenishment Settings** section, select the **Override Replenishment Settings**

check box.

* 1. In the **Replenishment Source** box, select the source of replenishment to apply to the stock item stored in the selected warehouse.
  2. In the **Replenishment Method** box, select the method of replenishment to apply to the stock item stored in the selected warehouse.
  3. In the **Replenishment Warehouse** box, select the warehouse that will be a source of replenishment.
  4. In the **Replenishment Parameters** section, specify the parameters according to business processes of your organization. To edit a parameter, you must first select the **Override** check box to the right of the parameter box.

1. On the form toolbar, click **Save**.