Products & Inventory

Create products, organize categories, track stock, and maintain accurate inventory.

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1. Product Catalog

Create, organize, find, and maintain the products your team sells.

How to create a product

In this guide: Add a new product to your catalog so it can be stocked, searched, and sold.

Before you start

- Have the product name, selling price, cost, category, and tax information ready.
- Use a unique UPC/barcode or SKU whenever possible.
- Choose the correct product type: Itemized, Serialized, or Service.

Steps

1. Open **Inventory**, then select **Products**.
2. Select **New Product**.
3. Enter the product name and choose its category and department.
4. Enter the selling price, purchase cost, tax settings, and any description your team needs.
5. Add a UPC/barcode or SKU. Avoid reusing an identifier assigned to another product.
6. If you have multiple locations, review the location-specific price, cost, and availability.
7. Add a product image if desired, then select **Save**.

What happens next

The product appears in the Product List and can be found at the register by name, exact UPC/barcode, or exact SKU. Serialized products also require an available IMEI or serial record before they can be sold.

Tips

- Use Itemized for products tracked by quantity.
- Use Serialized for devices tracked one unit at a time by IMEI or serial number.
- Use Service for labor or other non-stock charges.

How to find and review a product

In this guide: Find a product and review its catalog, pricing, and inventory information.

Steps

1. Open **Inventory > Products**.
2. Use the search box to enter a product name, UPC/barcode, or SKU.
3. Use the available filters to narrow the list by category, product type, or status.
4. Select the product to open its profile.
5. Review product details, location stock, pricing, purchase information, and product history.

At the register

You can also search the main register by product name, exact UPC/barcode, exact SKU, or—when serialized inventory is enabled—an exact IMEI or serial number. Exact identifiers take priority over broad name results.

If you cannot find a product

- Confirm you are working in the correct location.
- Clear unnecessary filters and try the full identifier.
- Check whether the product has been removed from the current location.

How to edit, merge, or remove a product

In this guide: Correct product details, combine duplicates, or remove a product from a location.

Edit a product

1. Open **Inventory > Products** and select the product.
2. Select **Edit**.
3. Update the allowed details, then select **Save**.

Merge duplicate products

1. From the Product List, choose the duplicate products.
2. Select the merge action.
3. Review which product will remain and which information will move.
4. Confirm only after verifying the UPC, SKU, category, price, and stock.

Remove a product from a location

A product normally must have zero local stock before it can be removed. Resolve reserved quantities, pending transfers, and active serialized units first. Removing a product from one location does not necessarily delete it organization-wide.

Important: Never change a serialized category to another type while active IMEI or serial records still exist.

How to create and manage categories

In this guide: Organize products and assign the inventory behavior they should use.

Create a category

1. Open **Inventory > Categories**.
2. Select **New Category**.
3. Enter a clear category name.
4. Choose the correct type: **Itemized**, **Serialized**, or **Service**.
5. Add an image if useful, then save.

Edit, merge, or delete a category

Open the category list and choose the applicable action. Before merging, confirm the destination type is correct. A category cannot be deleted organization-wide while products are still assigned to it.

Choose the right type

- **Itemized:** Quantity-based stock such as cases, cables, parts, and supplies.
- **Serialized:** Individually tracked devices with an IMEI or serial number.
- **Service:** Labor and other non-stock charges.

2. Itemized Inventory

Track quantities for accessories, parts, supplies, and other products sold from shared stock.

How to check itemized stock

In this guide: Check the quantity available for a product at the current location.

Steps

1. Confirm the correct location is selected.
2. Open **Inventory > Products**.
3. Search by product name, UPC/barcode, or SKU.
4. Review the stock shown for the current location.
5. Select the product to see its profile, pricing, purchases, and history.

Remember

Itemized stock is a shared quantity. A balance of 10 means ten interchangeable units are available. Serialized inventory is different: every available unit has its own IMEI or serial record.

How to count and correct itemized stock

In this guide: Reconcile the quantity in RepairNest POS with a physical count.

Steps

1. Open **Inventory > Products** and find the item.
2. Open the product profile or stock-count action.
3. Select the stock count or inventory adjustment option.
4. Enter the quantity physically counted at the current location.
5. Review the difference between the current balance and the new count.
6. Add a clear reason or note when requested.
7. Submit the count and verify the updated balance.

Before submitting

- Check for open purchases, pending transfers, and reserved stock.
- Count only stock physically owned by the selected location.
- Use the serialized inventory tools for serialized products; do not adjust them as a shared quantity.

How itemized products work at the register

In this guide: Find an itemized product, add it to the cart, and confirm the quantity.

Steps

1. Open the main register.
2. Scan the UPC/barcode or enter the product name or SKU.
3. Select the matching product if a result list appears.
4. Confirm the quantity and price in the cart.
5. Change the quantity only when the product and available stock allow it.
6. Continue with the normal checkout process.

Search tips

An exact UPC/barcode or exact SKU is the fastest way to identify a product. Product-name and partial-SKU searches may show multiple results, so verify the category, price, and local stock before selecting one.

3. Serialized Inventory

Manage individually tracked devices by IMEI or serial number, including status, history, and availability.

How to add serialized inventory

In this guide: Receive devices that must be tracked individually by IMEI or serial number.

Before you start

- The product must belong to a Serialized category.
- Have the vendor, purchase cost, IMEI or serial number, and device details ready.
- Confirm you are receiving into the correct location.

Steps

1. Open **Inventory > Purchases** and select **New Purchase**.
2. Choose the vendor and add the serialized product.
3. Enter each IMEI or serial number exactly as printed on the device.
4. Add purchase cost and any available device details.
5. Review the purchase total and payment information.
6. Save or complete the purchase.
7. Open **Inventory > Serialized Inventory** and verify that each unit is available at the correct location.

Important

Each serialized unit must have its own unique identifier and quantity of one. If an identifier already exists, review the existing record instead of creating a duplicate.

How to find a device by IMEI or serial number

In this guide: Locate one device and confirm its product, location, status, and history.

From Serialized Inventory

1. Open **Inventory > Serialized Inventory**.
2. Enter the complete IMEI or serial number in the search box.
3. Open the matching record.
4. Verify the product, current location, availability, purchase information, and activity history.

From the register

Enter or scan the exact IMEI or serial number in the main product search. An available unit at the current location resolves before UPC, SKU, and broad product-name results. If the unit is unavailable, reserved, sold, or conflicting, follow the message shown instead of selecting a broader match.

If there is no result

- Confirm every digit and remove accidental spaces.
- Check that you are in the location that owns the device.
- Review status filters such as Available, Sold, or Returned.

How to review a serialized item profile and history

In this guide: Understand where a serialized item came from and what happened to it.

Steps

1. Open **Inventory > Serialized Inventory**.
2. Search for the IMEI, serial number, or product.
3. Select the item to open its profile.
4. Review the product, IMEI/serial, current status, location, cost, and purchase reference.
5. Open the activity or history section to review receiving, transfers, sales, returns, swaps, and other changes.
6. Use the linked purchase or sale when you need the original transaction details.

Tip

Use history to investigate a discrepancy before editing a record. The latest available status and owning location determine whether a device can be selected at the register.

How to correct or move a serialized item

In this guide: Use the appropriate tool when a device has the wrong identifier, product, or location.

Choose the correct action

- **Wrong location:** Use an inventory transfer.
- **Wrong product:** Use the product-swap action from Serialized Inventory when available.
- **Wrong IMEI or serial:** Use the serial-swap or edit action when your permissions allow it.
- **Purchase-linked record:** Correct or void the related purchase rather than deleting the serial directly.

Steps

1. Find the device in **Serialized Inventory**.
2. Open its profile and review its complete activity history.
3. Select the appropriate edit, swap, or transfer action.
4. Confirm the replacement product, identifier, or destination.
5. Save and search the identifier again to verify the final state.

Important: Do not use itemized stock adjustments to correct serialized inventory. Every device must keep an auditable serial history.

4. Used Inventory

Record, review, and sell pre-owned devices acquired from customers or other sources.

How to add a used device

In this guide: Record a pre-owned device acquired from a customer or another source.

Before you start

- Make sure Used Inventory is enabled for the location.
- Have the customer or source, product, IMEI or serial number, condition, purchase cost, and intended selling price ready.
- Inspect the device and verify the identifier before completing the intake.

Steps

1. Open **Inventory > Used Inventory**.
2. Select **New Used Item**.
3. Choose the matching product.
4. Enter the IMEI or serial number and device details.
5. Record the condition, purchase cost, selling price, and customer or source information.
6. Add notes that will help staff identify the specific device.
7. Review the details and save.
8. Search Used Inventory for the identifier to confirm the record.

Important

Use a unique IMEI or serial number. Do not create a second record when the device already exists in Serialized or Used Inventory; review its current status and history first.

How to find, review, and sell a used device

In this guide: Locate a pre-owned item, verify its details, and add the correct unit to a sale.

Review the item

1. Open **Inventory > Used Inventory**.
2. Search by IMEI, serial number, product name, or other available details.
3. Select the record.
4. Verify the device, condition, location, status, purchase cost, selling price, source, and notes.

Sell the item

1. Open the main register.
2. Enter or scan the exact IMEI/serial number, or search by product name.
3. Select the specific available used unit.
4. Confirm the identifier, condition, and selling price in the cart.
5. Complete the sale normally.

If the item cannot be selected

Confirm the device belongs to the current location and is available. Sold, reserved, transferred, or conflicting records should be resolved through their original workflow rather than bypassed with a broad product match.

5. Inventory Operations

Receive inventory, transfer stock, print labels, and review inventory records and reports.

How to create and receive an inventory purchase

In this guide: Record inventory bought from a vendor and add it to the correct location.

Steps

1. Confirm the receiving location.
2. Open **Inventory > Purchases** and select **New Purchase**.
3. Select or create the vendor.
4. Add each product and enter the received quantity and purchase cost.
5. For serialized products, enter one unique IMEI or serial number for every unit.
6. Review taxes, fees, totals, payment method, and reference information.
7. Save or complete the purchase.
8. Open the purchase record and verify its status.
9. Check the Product List or Serialized Inventory to confirm the stock is available.

Tip

If a completed purchase is wrong, correct or void the purchase so inventory and payment history stay connected. Do not directly delete purchase-linked serialized records.

How to transfer inventory between locations

In this guide: Move itemized or serialized inventory while preserving location ownership and history.

Before you start

- Confirm the source and destination locations.
- Verify the stock is available at the source.
- Use the exact IMEI or serial number for serialized devices.

Steps

1. Open **Inventory > Transfers**.
2. Select **New Transfer**.
3. Choose the destination location or transfer endpoint.
4. Add itemized products and quantities.
5. Add each serialized device by its exact IMEI or serial number.
6. Review the transfer and submit it.
7. Complete any required sending and receiving steps.
8. Open the transfer record to confirm its final status.
9. Verify the stock left the source and is available at the destination.

Important

Do not use a stock adjustment to simulate a transfer. A transfer keeps an auditable movement record and prevents the same serialized device from appearing available in two locations.

How to print product and serialized labels

In this guide: Print labels that help staff scan and identify inventory.

Steps

1. Open the applicable product, serialized item, used item, or purchase record.
2. Select the label-printing action.
3. Choose the connected label printer and available label size.
4. Confirm the number of labels.
5. Preview the product name, price, UPC/SKU, and IMEI/serial information as applicable.
6. Print one test label and scan it before printing a large batch.

Tips

- Serialized product labels may require the large label format.
- Print one label per serialized unit so identifiers are never mixed.
- If a barcode does not scan, verify the identifier stored on the product or serial record before reprinting.

How to review inventory reports

In this guide: Use inventory reports to review itemized balances, serialized devices, costs, and discrepancies.

Steps

1. Open **Reports**.
2. Select the relevant inventory or product report.
3. Choose the location and date range when available.
4. Filter by product, category, status, or inventory type.
5. Review itemized quantities and serialized records separately.
6. Open a linked product, purchase, serial item, or transfer to investigate a result.
7. Export or print the report when you need a working copy.

Useful checks

- Compare report totals with the selected location, not the entire organization unless intended.
- For serialized discrepancies, inspect individual IMEI/serial history.
- For itemized discrepancies, check recent purchases, sales, returns, transfers, and stock counts.