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Concepts & Prerequisites

Plan item codes, units, categories, pricing, stock tracking, tax, and accounting before setup.

Item Setup

Create and maintain items, categories, brands, units, prices, variants, dimensions, images, serials, BOMs, and add-ons.

Plan Your Item and Inventory Setup

Plan Your Item and Inventory Setup

Overview

This guide will help you choose the correct item model and setup order before creating products, services, raw materials, variants, or manufactured items.

The selected model determines which nested forms, validations, stock movements, postings, and reports apply.

Who can do this

You need access to No write permission for planning. Creating records requires the needed Item and supporting-master permissions.

Before you start

Define whether each record is a service/non-stock item, stocked item, parent item, variant, raw material, bundled item, or manufactured item.

> Before saving, check that the correct company is open and that you have permission to complete this task.

Where to find it

Back Office → Items & Advanced Inventory.

Plan Your Item and Inventory Setup

Step 1: Create companies, locations, fiscal year, and required accounting defaults

Step 2: Create units of measurement and any needed conversions

Step 3: Create categories, brands, taxes, price groups, and accounts

Step 4: Decide barcode, SKU, UPC, description, and digital-invoicing identifiers

Step 5: Decide stock tracking, default location, reorder level, batches, serials, and

Decide stock tracking, default location, reorder level, batches, serials, and overselling policy.

Step 6: Decide base/minimum selling price, discount, tax, and commission

Step 7: For variants, create the non-stock parent and dimensions before derived

For variants, create the non-stock parent and dimensions before derived items.

Step 8: For manufacturing/bundles, create components before the BOM

Step 9: Create the item, then add opening stock only after all

Create the item, then add opening stock only after all classifications/accounts are correct.

Check your work

For every planned item, document its type, unit, category, location, pricing, tax, accounting, variant/BOM relationship, and opening-stock source.

> Take a moment to check your work before closing the window. This small check can save time later.

If something goes wrong

- Do not use stock adjustments to compensate for a poorly chosen item model.
- Serialization cannot be assumed reversible after item creation.

Related guides

- Create a Unit of Measurement
- Create an Item Category
- Create a Basic Service or Non-Stock Item
- Create a Stocked Item

What to do next

> **Create a Unit of Measurement**.

Configure Item Unit Conversions

How to Configure Item Unit Conversions in Muhasib ERP

Overview

This guide will help you configure an item to be bought, stocked, or sold in an alternate unit while retaining a consistent base quantity.

Muhasib converts transaction quantities into inventory quantities and can use unit-specific pricing. Wrong direction can multiply or divide stock unexpectedly.

Who can do this

You need access to Item Update and access to item units/unit-of-measure features.

Before you start

Define the exact mathematical relationship, base unit, alternate unit, permitted transaction types, rounding precision, and expected price behavior.

> Before saving, check that the correct company is open and that you have permission to complete this task.

Where to find it

Back Office → Items & Advanced Inventory → Manage Items → select item → Item Units.

Configure Item Unit Conversions

Step 1: Confirm the item's base unit

Step 2: Open Item Units

Step 3: Select the alternate unit

Step 4: Enter the conversion relationship exactly as presented by the verified

Enter the conversion relationship exactly as presented by the verified system.

Step 5: Configure applicable purchase/sale pricing or defaults

Configure needed purchase/sale pricing or defaults.

Step 6: Save

Step 7: Test one Purchase and one Sale using the alternate unit

Check your work

Compare and Confirm line quantity, base quantity, item stock, cost, sale price, BOM usage, and reports.

> Take a moment to check your work before closing the window. This small check can save time later.

If something goes wrong

- Restore the snapshot if stock changes in the wrong direction.
- Do not alter a conversion with open orders or existing stock without impact analysis.

Related guides

- Create a Unit of Measurement
- Create a Stocked Item
- Review Item Stock by Location and Batch

What to do next

> **Create a Unit of Measurement**.

Create an Item Category

How to Create an Item Category in Muhasib ERP

Overview

This guide will help you create a category that organizes items for POS filtering and reporting.

The category becomes available in Item master and needed POS/report filters.

Who can do this

You need access to Item Category and Item Category Add.

Before you start

Define a stable hierarchy and decide whether the category is top-level or belongs under an existing parent.

> Before saving, check that the correct company is open and that you have permission to complete this task.

Where to find it

Back Office → Items & Advanced Inventory → Manage Item Category.

Create an Item Category

Step 1: Choose New Record

Step 2: Enter Category Name and Long Description

Step 3: Select Parent when this is a child category

Step 4: Choose front/back display colors when used by the POS interface

Step 5: Choose Save

Check your work

Assign it to a disposable item and check hierarchy, color, POS filter, and report grouping.

> Take a moment to check your work before closing the window. This small check can save time later.

If something goes wrong

- Avoid circular/self-parent relationships.
- Do not rename categories without considering historical report labels.

Related guides

- Create a Basic Service or Non-Stock Item
- Create a Stocked Item
- Import or Export Item Categories

What to do next

> **Create a Basic Service or Non-Stock Item**.

Item Setup

Create an Item Brand

How to Create an Item Brand in Muhasib ERP

Overview

This guide will help you create a reusable brand classification for items.

The brand becomes selectable on Item records and available to needed searches/reports.

Who can do this

You need access to The your Muhasib installation currently appears to gate Item Brand with Item Category view/add/update/delete rights. Confirm this before assigning access.

Before you start

Search existing brands and agree on official spelling.

> Before saving, check that the correct company is open and that you have permission to complete this task.

Where to find it

Back Office → Items & Advanced Inventory → Manage Items → brand add/selection workflow, or the verified brand master route.

Create an Item Brand

Step 1: Open Item Brands

Step 2: Choose New Record

Step 3: Enter Brand Name without a leading space

Step 4: Enter Long Description when useful

Step 5: Choose Save

Check your work

Assign the brand to a disposable item and check item list/search behavior.

> Take a moment to check your work before closing the window. This small check can save time later.

If something goes wrong

- If the add action is missing, check Item Category permission due to the current implementation discrepancy.

Related guides

- Create an Item Category
- Create a Stocked Item
- Audit a User's Effective Access

What to do next

> **Create an Item Category**.

Configure Item Pricing, Discount, Tax, and Commission

How to Configure Item Pricing, Discount, Tax, and Commission in Muhasib ERP

Overview

This guide will help you configure an item's base/minimum selling price, discount, taxes, and commission so the expected final price is produced.

New allowed transaction lines use item and company pricing/tax/commission rules; user permissions may allow price override or price-group selection.

Who can do this

You need access to Item Update plus access to Tax and needed commission features.

Before you start

Record current values and define expected results for before/after-discount tax, inclusive/exclusive tax, minimum price, commission basis, and returns.

> Before saving, check that the correct company is open and that you have permission to complete this task.

Where to find it

Back Office → Items & Advanced Inventory → Manage Items → select item → pricing/tax area.

Configure Item Pricing, Discount, Tax, and Commission

Step 1: Enter the default Selling Price

Step 2: Enter the minimum selling price below the default price when used

Step 3: Enter Discount between 0 and 100

Step 4: Enable/select Tax 1 and Tax 2 only when applicable

Enable/select Tax 1 and Tax 2 only when needed.

Step 5: Select tax type/calculation fields and verify company POS tax method

Step 6: Configure commission type/value

Step 7: Review displayed Final Sell Price and Profit Per Unit

Step 8: Choose Update and confirm

Check your work

Test normal, discounted, tax, return, alternate-unit, and price-group sales. Compare and Confirm invoice, tax report, commission report, and GL.

> Take a moment to check your work before closing the window. This small check can save time later.

If something goes wrong

- Separate tax timing from inclusive display settings.
- Do not change master price to correct one historical invoice.

Related guides

- Create a Tax
- Add Multiple Item Prices
- Create and Apply an Item Price Group
- Configure POS Behavior for a Company

What to do next

> **Create a Tax**.

Assign Item Accounting Accounts

Assign Item Accounting Accounts

Overview

This guide will help you map an item to the approved Sales, COGS, Inventory, and Inventory Adjustment accounts.

Future allowed transactions can post to these accounts. Source alone does not prove that existing ledger entries are reclassified.

Who can do this

You need access to Item Update, Chart of Accounts access, and financial-controller authorization.

Before you start

Create and validate the Chart of Accounts and global default accounts. Record current item mappings and compare and confirm stock value/GL balances.

> Before saving, check that the correct company is open and that you have permission to complete this task.

Where to find it

Back Office → Items & Advanced Inventory → Manage Items → Accounting and Finance.

Assign Item Accounting Accounts

Step 1: Select the item

Step 2: Select the approved Sales Account

Step 3: Select the approved COGS Account

Step 4: Select the approved Inventory Account

Step 5: Select the approved Inventory Adjustment Account

Step 6: Review whether item-specific mappings override global defaults

Step 7: Choose Update and confirm

Step 8: Close/reopen transaction forms before testing

Check your work

Run a disposable purchase, sale, return, and adjustment, then compare and confirm source document, stock ledger, journal/general ledger, Trial Balance, and Profit and Loss.

> Take a moment to check your work before closing the window. This small check can save time later.

If something goes wrong

- Do not change account mappings to force a Trial Balance correction.
- Reverse/correct source transactions through supported workflows.

Related guides

- Configure Accounting Settings
- Build and Maintain the Chart of Accounts
- Review the Account Ledger Report

- Configure Purchase and Inventory Behavior

What to do next

> **Configure Accounting Settings**.

Configure a Parent Item and Variants

How to Configure a Parent Item and Variants in Muhasib ERP

Overview

This guide will help you create a non-stock parent item and associate stockable variation items beneath it.

The parent provides a grouping/settings identity while derived items carry stock and transaction identity.

Who can do this

You need access to Item Add/Update and Item Dimensions.

Before you start

Define dimensions and valid combinations, naming/barcode/SKU policy, shared category/brand/tax, variant-specific price, and opening stock.

> Before saving, check that the correct company is open and that you have permission to complete this task.

Where to find it

Back Office → Items & Advanced Inventory → Manage Items.

Configure a Parent Item and Variants

Step 1: Create the top-level parent item and keep it non-stockable as

Create the top-level parent item and keep it non-stockable as indicated by the current UI model.

Step 2: Configure dimensions and allowed values

Step 3: Create each derived item with a unique barcode/name/SKU

Step 4: Select the parent item; never select the item itself

Step 5: Enable stock tracking on each sellable variation and choose its location

Step 6: Configure variation price, tax, serial/batch, and opening stock

Step 7: Save each item and test selection in POS/Purchase

Check your work

Confirm each variation is independently selectable, priced, stocked, purchased, sold, returned, and reported while grouping under the parent where intended.

> Take a moment to check your work before closing the window. This small check can save time later.

If something goes wrong

- Do not reuse one barcode across variations.
- Remove/reassign children through supported updates before an approved parent retirement.

Related guides

- Configure Item Dimensions
- Create a Stocked Item
- Review Item Stock by Location and Batch

What to do next

> **Configure Item Dimensions**.

Configure Item Dimensions

How to Configure Item Dimensions in Muhasib ERP

Overview

This guide will help you define variation dimensions and values that can distinguish derived items such as size, color, or pack.

The parent/variant workflow can present variations during item selection and reporting. Unsupported or duplicate combinations should be excluded.

Who can do this

You need access to Item Dimensions access and Item Update for the parent/derived records.

Before you start

Create the non-stock parent and agree on dimension names, allowed values, ordering, naming, SKU/barcode, pricing, and stock ownership.

> Before saving, check that the correct company is open and that you have permission to complete this task.

Where to find it

Back Office → Items & Advanced Inventory → Manage Items → select parent → Item Dimensions.

Configure Item Dimensions

Step 1: Confirm the selected item is the intended parent

Step 2: Add the first dimension and its allowed values

Step 3: Add further dimensions only when needed

Step 4: Review value spelling and order

Step 5: Save the dimension definition

Step 6: Create or associate each supported derived item/combination through the verified

Create or associate each supported derived item/combination through the verified system workflow.

Step 7: Give every derived item a unique barcode/SKU and stock configuration

Check your work

Test every allowed combination in Item master, Purchase, POS, Sale Return, stock reports, and forecast.

> Take a moment to check your work before closing the window. This small check can save time later.

If something goes wrong

- Do not rename/delete a value used by active variants without dependency review.
- If combinations multiply unexpectedly, restore and simplify the dimension set.

Related guides

- Configure a Parent Item and Variants
- Create a Stocked Item

- Review Item Stock by Location and Batch

What to do next

> **Configure a Parent Item and Variants**.

Add Multiple Item Prices

How to Add Multiple Item Prices in Muhasib ERP

Overview

This guide will help you add alternate prices to an item and check which price Muhasib applies.

Eligible item-selection workflows may offer or automatically apply an alternate price.

Who can do this

You need access to Item Update and Item Multiple Prices.

Before you start

Define each price's purpose, amount, scope, effective conditions, tax basis, unit, and relationship to minimum/default price.

> Before saving, check that the correct company is open and that you have permission to complete this task.

Where to find it

Back Office → Items & Advanced Inventory → Manage Items → select item → Multiple Prices.

Add Multiple Item Prices

Step 1: Confirm the item's default selling price and unit

Step 2: Open Item Multiple Prices

Step 3: Add the alternate price and its available qualifiers

Step 4: Ensure the value follows minimum-price and tax policy

Step 5: Save

Step 6: Repeat only for distinct price outcomes

Step 7: Test selection in POS with and without price-group permission

Check your work

Compare and Confirm the selected price, discount, tax, invoice line, margin, and sales report under every qualifying condition.

> Take a moment to check your work before closing the window. This small check can save time later.

If something goes wrong

- Do not duplicate equivalent prices.
- If an unexpected price wins, record all active qualifiers before changing data.

Related guides

- Configure Item Pricing, Discount, Tax, and Commission
- Create and Apply an Item Price Group
- Configure Item Unit Conversions

What to do next

Configure Item Pricing, Discount, Tax, and Commission.

Create and Apply an Item Price Group

How to Create and Apply an Item Price Group in Muhasib ERP

Overview

This guide will help you create a named price group and check its controlled use during item selection.

Authorized transaction users can apply allowed group pricing without changing the item's default price.

Who can do this

You need access to Item Price Group Add/Update and needed POS Select Item Price Group permission.

Before you start

Define the business audience, allowed items, prices, effective period if supported, and users allowed to select the group.

> Before saving, check that the correct company is open and that you have permission to complete this task.

Where to find it

Back Office → Items & Advanced Inventory → Item Price Group.

Create and Apply an Item Price Group

Step 1: Choose New Record

Step 2: Enter Item Price Group Name and Description

Step 3: Choose Save

Step 4: Associate approved item prices through the relevant item/price workflow

Step 5: Grant selection permission only to authorized roles

Step 6: Select the group in a disposable POS sale

Check your work

Confirm correct item price, tax, discount, margin, receipt, and report; check unauthorized users cannot select the group.

> Take a moment to check your work before closing the window. This small check can save time later.

If something goes wrong

- Check multiple-price and promotion conflicts.
- Do not grant price-group selection as a workaround for wrong base pricing.

Related guides

- Add Multiple Item Prices
- Configure Item Pricing, Discount, Tax, and Commission
- Grant and Revoke Muhasib Permissions

What to do next

Add Multiple Item Prices.

Add Item Images

How to Add Item Images in Muhasib ERP

Overview

This guide will help you add approved item images for POS/search and other enabled displays.

Enabled POS/item-search screens may show the image. Backup coverage depends on actual storage location.

Who can do this

You need access to Item Update and needed image feature.

Before you start

Prepare optimized, licensed images without customer data. Confirm allowed file types, dimensions, size, storage/backup policy, and whether multiple images are enabled.

> Before saving, check that the correct company is open and that you have permission to complete this task.

Where to find it

Back Office → Items & Advanced Inventory → Manage Items → select item → image action.

Add Item Images

Step 1: Confirm the exact item

Step 2: Select the primary image

Step 3: When multiple images are licensed/configured, open Item Images and add

When multiple images are licensed/set up, open Item Images and add only required views.

Step 4: Set primary/order/caption fields where available

Step 5: Save

Step 6: Close and reopen item/POS search

Check your work

Confirm correct item association, clarity, aspect ratio, search performance, and backup/restore of image files.

> Take a moment to check your work before closing the window. This small check can save time later.

If something goes wrong

- Remove/replace only after confirming which item is selected.
- Avoid network paths without tested availability and permissions.

Related guides

- Create a Stocked Item
- Configure This Workstation's POS Experience
- Create and Verify a Manual Backup

What to do next

> **Create a Stocked Item**.

Enable and Maintain Item Serials

Enable and Maintain Item Serials

Overview

This guide will help you create a serialized item and track unique units through supported stock transactions.

Each physical unit must be represented by a valid unique serial and move consistently with stock.

Who can do this

You need access to Item Add/Update and access to serial-capable inventory/transaction workflows.

Before you start

Decide serialization before item creation. Define serial format, uniqueness scope, capture point, import policy, and return/warranty handling.

> Before saving, check that the correct company is open and that you have permission to complete this task.

Where to find it

Back Office → Items & Advanced Inventory → Manage Items → Item Serialization/Item Serials.

Enable and Maintain Item Serials

Step 1: Create/select the intended stocked item

Step 2: Enable Item Serialization during the supported creation path

Step 3: Save the item

Step 4: Enter serials through opening stock, Purchase/GRN, or other supported receipt

Enter serials through opening stock, Purchase/GRN, or other supported receipt workflow.

Step 5: Select exact available serials during Sale, Transfer, Adjustment, WIP, or

Select exact available serials during Sale, Transfer, Adjustment, WIP, or Return.

Step 6: Use Item Serials/stock inquiry to review status

Check your work

Trace one serial from receipt through location, sale, return, and report. Confirm duplicate/unavailable serials are rejected.

> Take a moment to check your work before closing the window. This small check can save time later.

If something goes wrong

- Do not edit the database to correct a serial.
- Use approved return/adjustment workflows and preserve audit evidence.

Related guides

- Create a Stocked Item
- Create Item Opening Stock

- Review Item Stock by Location and Batch
- Transfer Stock Between Locations

What to do next

> **Create a Stocked Item**.

Create an Item Bill of Materials

How to Create an Item Bill of Materials in Muhasib ERP

Overview

This guide will help you define the ordered component recipe for a manufactured or bundled item.

Production/bundling workflows can use the BOM to plan or consume components and calculate cost.

Who can do this

You need access to Item BOM and Item BOM Add/Update, plus Item view.

Before you start

Create the finished item, component items, units/conversions, locations, costs, and accounting mappings. Define yield, wastage, and effective recipe outside Muhasib when versioning is not supported.

> Before saving, check that the correct company is open and that you have permission to complete this task.

Where to find it

Back Office → Items & Advanced Inventory → Manage Item BOM.

Create an Item Bill of Materials

Step 1: Select the finished/manufactured item

Step 2: Enable/confirm BOM definition

Step 3: Choose a component item

Step 4: Select its Item Unit

Step 5: Enter Quantity and Order Index

Step 6: Add each component once; duplicate component items are rejected in

Add each component once; duplicate component items are rejected in the checked logic.

Step 7: Review Production Cost and overselling behavior

Step 8: Save recipe and definition when the form presents separate actions

Check your work

Create a disposable production/bundle transaction and compare and confirm component quantities/units, stock movements, finished stock, WIP, cost, and GL.

> Take a moment to check your work before closing the window. This small check can save time later.

If something goes wrong

- Do not add the same component twice to represent two stages; use supported process structure.
- Check for circular dependencies before saving.

Related guides

- Create a Stocked Item
- Configure Item Unit Conversions
- Create a Production Order
- Issue Stock to a Work Process

What to do next

> **Create a Stocked Item**.

Configure Item Add-ons

How to Configure Item Add-ons in Muhasib ERP

Overview

This guide will help you associate optional add-on items with a parent sale item for controlled selection.

POS can prompt for associated options. Add-ons may create separate lines and affect price, tax, inventory, printing/kitchen, and reports.

Who can do this

You need access to Item Update and access to Item Addon/Food Addon maintenance.

Before you start

Create each add-on as the correct stock/non-stock item with price, tax, unit, location, and accounts. Define required/optional and quantity rules.

> Before saving, check that the correct company is open and that you have permission to complete this task.

Where to find it

Back Office → Items & Advanced Inventory → Item Addon and/or Manage Items → add-on selection.

Configure Item Add-ons

Step 1: Select the parent item

Step 2: Open its add-on association workflow

Step 3: Select each eligible add-on item

Select each allowed add-on item.

Step 4: Configure available quantity/default/required behavior where supported

Step 5: Save

Step 6: Open POS and select the parent item

Step 7: Add/remove options and confirm line totals

Check your work

Test optional/required choices, duplicates, quantities, returns, receipts, stock, tax, kitchen output, and add-on sales reports.

> Take a moment to check your work before closing the window. This small check can save time later.

If something goes wrong

- Do not assume an add-on inherits parent tax or stock behavior.
- If multiple add-on implementations appear, use only the active target-system path.

Related guides

- Create a Basic Service or Non-Stock Item
- Create a Stocked Item
- Create a POS Sale
- Review the Add-on Sales Report

What to do next

Create a Basic Service or Non-Stock Item.

Update an Item Safely

How to Update an Item Safely in Muhasib ERP

Overview

This guide will help you change permitted item fields while preserving stock, pricing, tax, accounting, variant, and transaction history.

Muhasib updates the master and related item details. Existing documents may keep values or re-render current descriptions depending on output path; check before broad changes.

Who can do this

You need access to Item and Item Update, plus nested-feature permissions as needed.

Before you start

Identify the item by ID/barcode, record current settings, close related transactions, and review stock, open orders, BOMs, variants, serials, prices, taxes, and accounts.

> Before saving, check that the correct company is open and that you have permission to complete this task.

Where to find it

Back Office → Items & Advanced Inventory → Manage Items.

Update an Item Safely

Step 1: Filter and select the exact item

Step 2: Change only approved identity, classification, price, tax, commission, stock-alert, location,

Change only approved identity, classification, price, tax, commission, stock-alert, location, or account fields.

Step 3: Do not attempt to change serialization; Muhasib's check blocks

Do not attempt to change serialization; Muhasib's check blocks it.

Step 4: Do not make a parent item stockable while derived items use it

Step 5: Review minimum/default price, discount, taxes, category, parent, and default location

Review minimum/default price, discount, taxes, category, parent, and default location validations.

Step 6: Choose Update and confirm

Step 7: Reopen item and affected transaction forms

Check your work

Check Item list, stock/location, price/tax, POS/Purchase selection, BOM/variant links, accounting mappings, and a reprint of old versus new test records.

> Take a moment to check your work before closing the window. This small check can save time later.

If something goes wrong

- Correct source master data instead of editing historical transactions indiscriminately.
- Restore recorded values when an unexpected dependent workflow changes.

Related guides

- Create a Stocked Item
- Configure Item Pricing, Discount, Tax, and Commission
- Retire or Delete an Item Safely

What to do next

> **Create a Stocked Item**.

Retire or Delete an Item Safely

How to Retire or Delete an Item Safely in Muhasib ERP

Overview

This guide will help you stop an item from ordinary use or remove it only when every dependency has been resolved and deletion is approved.

Source blocks deletion when location inventory exists, the item is a BOM ingredient, or it parents variation items. Other historical dependencies and the global delete-after-transaction setting still require verification.

Who can do this

You need access to Item Update for deactivation where supported; Item Delete and explicit business approval for deletion.

Before you start

Back up the database. Review stock at every location/batch/serial, open orders, transactions, BOM ingredient use, parent/variant relationships, integrations, prices, and reports.

> Before saving, check that the correct company is open and that you have permission to complete this task.

Where to find it

Back Office → Items & Advanced Inventory → Manage Items.

Retire or Delete an Item Safely

Step 1: Select the item by stable ID/barcode

Step 2: Prefer disabling/retiring it when the runtime provides a supported status

Step 3: Transfer/adjust stock through approved transactions until reconciled zero

Step 4: Remove it from BOMs and resolve child variants through supported updates

Step 5: Close or correct open transactions/orders

Step 6: Choose Delete only after approval and confirmation

Step 7: Stop on any dependency warning

Check your work

Confirm history remains reportable, stock/GL compare and confirm, the item is not selectable for new work, and no orphan BOM/variant/price/image/serial rows remain in a clone.

> Take a moment to check your work before closing the window. This small check can save time later.

If something goes wrong

- Do not delete to hide wrong stock or free licence capacity.
- Use corrections/returns/transfers/adjustments for business data.

Related guides

- Update an Item Safely
- Create an Inventory Adjustment
- Transfer Stock Between Locations
- Create and Verify a Manual Backup

What to do next

> **Update an Item Safely**.

Modify Item Batches

Modify Item Batches

Overview

This guide will help you correct approved batch information without changing unexplained stock quantities or transaction history.

Batch attributes can affect availability, expiry reporting, selection, costing, and record history. Historical re-rendering needs verification.

Who can do this

You need access to Modify Item Batches and relevant inventory rights.

Before you start

Back up the database. Identify batch, item, location, quantities, purchases/sales/returns, expiry, cost, tax, and required correction evidence.

> Before saving, check that the correct company is open and that you have permission to complete this task.

Where to find it

Back Office → Items & Advanced Inventory → Modify Item Batches.

Modify Item Batches

Step 1: Find the exact item/batch by stable identifiers

Step 2: Compare stored values with source documents and Batch/Stock Ledger reports

Step 3: Change only fields supported for correction

Step 4: Do not alter quantity to replace an Inventory Adjustment/Transfer/Return

Step 5: Confirm/save once

Step 6: Reopen batch and affected reports

Check your work

Compare and Confirm batch report, stock/location, expiry, ledger movements, valuation, and a controlled selection transaction.

> Take a moment to check your work before closing the window. This small check can save time later.

If something goes wrong

- Use supported stock transactions for quantity/location corrections.
- Preserve old/new values in the audit record.

Related guides

- Review Item Stock by Location and Batch
- Create an Inventory Adjustment
- Review the Stock Ledger Report

What to do next

> **Review Item Stock by Location and Batch**.

Print Item Labels

How to Print Item Labels in Muhasib ERP

Overview

This guide will help you print the correct quantity of readable labels for selected items.

Muhasib renders labels using global label settings and the selected/logical printer.

Who can do this

You need access to Item Label Printing and needed Print permission.

Before you start

Configure/test the printer and label layout. Check item names, barcodes, and prices. Use a PDF/test sheet before label stock.

> Before saving, check that the correct company is open and that you have permission to complete this task.

Where to find it

Back Office → Items & Advanced Inventory → Item Label Printing.

Print Item Labels

Step 1: Select item(s) by stable identifier

Step 2: Enter approved label quantities

Step 3: Review displayed name, barcode, and price

Step 4: Select printer/layout when prompted

Step 5: Preview one page where available

Step 6: Print a small test

Step 7: Scan every barcode type and check price/name

Step 8: Print the remaining approved quantity once

Check your work

Confirm count, alignment, legibility, scanner result, item identity, price, and no duplicate jobs.

> Take a moment to check your work before closing the window. This small check can save time later.

If something goes wrong

- Stop on clipped or unscannable barcodes.
- Correct layout settings one dimension at a time.

Related guides

- Configure Item Label Printing
- Register a Printer
- Resolve Muhasib Printing Setup Problems

What to do next

> **Configure Item Label Printing**.

Check an Item Price

How to Check an Item Price in Muhasib ERP

Overview

This guide will help you look up an item's current effective price without creating a transaction.

The checker displays source-derived pricing without saving a sale. It may not represent every customer/transaction-specific override.

Who can do this

You need access to Item Price Checker and item visibility; sensitive cost/margin display may require separate rights.

Before you start

Know the barcode/SKU/name, company, price group/customer context, unit, tax, and date relevant to the question.

> Before saving, check that the correct company is open and that you have permission to complete this task.

Where to find it

Back Office → Items & Advanced Inventory → Item Price Checker.

Check an Item Price

Step 1: Open Item Price Checker

Step 2: Scan/enter the barcode or search for the item

Step 3: Confirm item name and unit

Step 4: Review displayed price and any available tax/stock/alternate-price context

Step 5: If the value differs from expectation, review base price, multiple

If the value differs from expectation, review base price, multiple prices, price group, promotions, unit conversion, discount, and tax settings.

Check your work

Compare with a disposable POS item selection under the same user, company, customer, unit, and price group.

> Take a moment to check your work before closing the window. This small check can save time later.

If something goes wrong

- Confirm barcode uniqueness and selected variant.
- Do not change the item master until price precedence is identified.

Related guides

- Configure Item Pricing, Discount, Tax, and Commission
- Add Multiple Item Prices
- Create and Apply an Item Price Group

What to do next

Configure Item Pricing, Discount, Tax, and Commission.

Stock Setup

Prepare stock rules, locations, units, batches, opening quantities, and inventory controls.

Prepare for Inventory Control Transactions

How to Prepare for Inventory Control Transactions in Muhasib ERP

Overview

This guide will help you confirm the controls required before adjusting, transferring, requisitioning, or reconciling stock.

Authorized users can process inventory movements against controlled masters and a known starting position.

Who can do this

You need access to Relevant inventory transaction and inquiry rights plus item/location.

Before you start

Confirm item setup, units, locations, batches/serials, fiscal/working period, negative-stock policy, approval limits, and physical-count procedure.

> Before saving, check that the correct company is open and that you have permission to complete this task.

Where to find it

Back Office → Items & Advanced Inventory.

Prepare for Inventory Control Transactions

Step 1: Confirm the active company and period

Step 2: Verify each participating item and location

Step 3: Confirm batch, serial, expiry, and unit controls

Step 4: Review current stock and pending transactions

Step 5: Separate entry, approval, and verification duties where required

Step 6: Record opening control totals before live processing

Check your work

Confirm required forms are accessible and inquiry balances match the opening control totals.

> Take a moment to check your work before closing the window. This small check can save time later.

If something goes wrong

- Resolve master-data or period errors before transacting.
- Do not enable negative stock merely to bypass an unexplained shortage.

Related guides

- Create an Inventory Adjustment
- Transfer Stock Between Locations
- Reconcile the Stock Ledger to Physical Stock

What to do next

Create an Inventory Adjustment.

Stock Setup

Create a Unit of Measurement

How to Create a Unit of Measurement in Muhasib ERP

Overview

This guide will help you add a reusable base unit for item quantities.

The unit becomes selectable as an item's base unit and may participate in item-specific conversions.

Who can do this

You need access to Unit of Measure and Unit of Measure Add.

Before you start

Agree on a short, unambiguous unit name such as Each, Box, Kilogram, or Litre. Avoid creating aliases for an existing unit.

> Before saving, check that the correct company is open and that you have permission to complete this task.

Where to find it

Back Office → Items & Advanced Inventory → Unit of Measurement.

Create a Unit of Measurement

Step 1: Choose New Record

Step 2: Enter Unit of Measure Name

Step 3: Enter a useful Long Description

Step 4: Choose Save

Step 5: Reopen the record from the list

Check your work

Create or edit a disposable item and confirm the unit appears once with the intended wording.

> Take a moment to check your work before closing the window. This small check can save time later.

If something goes wrong

- Search before creating a near-duplicate.
- Do not delete a unit used by items or transactions.

Related guides

- Configure Item Unit Conversions
- Create a Stocked Item
- Create an Item Bill of Materials

What to do next

> **Configure Item Unit Conversions**.

Imports & Bulk Operations

Import, export, update, edit, or retire many item and stock records safely.

Import Items

How to Import Items in Muhasib ERP

Overview

This guide will help you validate and import a controlled batch of item masters without duplicates or unintended stock.

The importer can create many item and related records. If an import stops because of an error, check which records were saved before trying again.

Who can do this

You need access to Item import and needed Item Add/supporting-master permissions.

Before you start

Back up the database. Export/get the exact target-build template. Create referenced units, categories, brands, taxes, locations, and accounts. Use a small synthetic pilot.

> Before saving, check that the correct company is open and that you have permission to complete this task.

Where to find it

Back Office → Items & Advanced Inventory → Item Bulk Import/Import Items.

Import Items

Step 1: Use the unmodified target template and headers

Step 2: Populate required identity and referenced-master values

Step 3: Check unique barcode/SKU policy, numeric/date/boolean formats, decimals, price/tax, item type,

Check unique barcode/SKU policy, numeric/date/boolean formats, decimals, price/tax, item type, and stock flags.

Step 4: Keep opening quantities out unless the template explicitly supports and

Keep opening quantities out unless the template explicitly supports and the workflow is approved.

Step 5: Import a small pilot file

Step 6: Review validation/errors and resulting records

Step 7: Correct the source file, not partially imported records, unless the

Correct the source file, not partially imported records, unless the rerun policy is known.

Step 8: Import the approved batch once

Check your work

Compare source-row count to created/skipped/failed rows; check duplicates, master links, prices, taxes, locations, stock, and accounts.

> Take a moment to check your work before closing the window. This small check can save time later.

If something goes wrong

- Stop after partial failure until rerun/deduplication is understood.

- Never import production data first as the test.

Related guides

- Plan Your Item and Inventory Setup
- Import Item Stock
- Bulk Edit Items

What to do next

> **Plan Your Item and Inventory Setup**.

Import Item Stock

How to Import Item Stock in Muhasib ERP

Overview

This guide will help you import approved item quantities by location/batch and compare and confirm the resulting inventory.

The import changes recorded inventory and may affect valuation/accounting depending on implementation.

Who can do this

You need access to Import Item Stock plus inventory/location and needed financial permissions.

Before you start

Back up the database, freeze stock movement, get a physical/source schedule at one timestamp, and create all items, units, locations, batches/serials, fiscal year, and accounts.

> Before saving, check that the correct company is open and that you have permission to complete this task.

Where to find it

Back Office → Items & Advanced Inventory → Import Item Stock.

Import Item Stock

Step 1: Use the target-build template

Step 2: Map each row to one item, unit, location, and batch/serial scope

Step 3: Validate quantity, cost, date, identifiers, and duplicates

Step 4: Import a small pilot into a restored snapshot

Step 5: Review errors and determine whether any rows committed

Step 6: Restore, correct, and import the approved final file once

Step 7: Resume stock movement only after reconciliation

Check your work

Compare and Confirm every file total with Stock Report, Stock Ledger, batch/serial inquiry, location totals, valuation, and GL where needed.

> Take a moment to check your work before closing the window. This small check can save time later.

If something goes wrong

- Do not rerun an uncertain file.
- Do not offset duplicates with unexplained negative rows.

Related guides

- Create Item Opening Stock
- Import Items
- Review Item Stock by Location and Batch

What to do next

> **Create Item Opening Stock**.

Import or Export Item Categories

How to Import or Export Item Categories in Muhasib ERP

Overview

This guide will help you export category data for review or import an approved hierarchy without duplicate or circular parents.

Imported categories become available to Item master, POS filters, and reports. Whether existing rows update or duplicate depends on matching behavior.

Who can do this

You need access to Import/Export Item Category and needed category add/update rights.

Before you start

Back up the database and get the target-build template. Define unique names, parents, ordering, and colors.

> Before saving, check that the correct company is open and that you have permission to complete this task.

Where to find it

Back Office → Items & Advanced Inventory → Import / Export Item Category.

Import or Export Item Categories

Step 1: Export existing categories when preparing an update/reference

Step 2: Preserve headers and data types

Step 3: Validate each parent exists or is created in supported order

Step 4: Remove self/circular relationships and duplicate names

Step 5: Import a small pilot

Step 6: Review results and restore before final import when needed

Check your work

Compare row counts/hierarchy/colors and assign each test category to an item; check filters/reports.

> Take a moment to check your work before closing the window. This small check can save time later.

If something goes wrong

- Do not assume exported database IDs are portable between databases.
- Stop on partial hierarchy creation.

Related guides

- Create an Item Category

- Import Items
- Review Item-wise and Category Sales Analysis

What to do next

> **Create an Item Category**.

Bulk Update Items

Bulk Update Items

Overview

This guide will help you apply one approved field/value change to a reviewed set of items.

Muhasib changes the chosen field across selected items. The operation may not be atomic and can affect pricing, tax, category, stock policy, or transaction selection.

Who can do this

You need access to Item Bulk Update and needed Item Update rights.

Before you start

Back up the database. Define the exact filter, expected item IDs/count, field, new value, and rollback value. Close related forms.

> Before saving, check that the correct company is open and that you have permission to complete this task.

Where to find it

Back Office → Items & Advanced Inventory → Item Bulk Update.

Bulk Update Items

Step 1: Filter/select candidate items

Step 2: Export or record selected stable IDs and current values

Step 3: Confirm selected count and company scope

Step 4: Choose one supported field and approved value

Step 5: Preview when available

Step 6: Execute once and preserve the result message

Step 7: Reopen a sample and relevant reports

Check your work

Compare before/after counts and values for every selected ID; check no unselected item changed and test downstream behavior.

> Take a moment to check your work before closing the window. This small check can save time later.

If something goes wrong

- Stop if selected count differs from expectation.
- Restore from backup rather than applying an unverified inverse bulk change.

Related guides

- Bulk Edit Items
- Update an Item Safely
- Create and Verify a Manual Backup

What to do next

> **Bulk Edit Items**.

Bulk Edit Items

Bulk Edit Items

Overview

This guide will help you review and edit different values across multiple item rows with a complete change record.

Multiple item records can receive different updates. Downstream consequences follow each edited field.

Who can do this

You need access to Item Bulk Edit and needed Item Update rights.

Before you start

Back up the database. Export stable IDs/current values and define approved changes row by row.

> Before saving, check that the correct company is open and that you have permission to complete this task.

Where to find it

Back Office → Items & Advanced Inventory → Item Bulk Edit.

Bulk Edit Items

Step 1: Apply a narrow filter

Step 2: Confirm every loaded item ID

Step 3: Edit only approved cells

Step 4: Validate barcode uniqueness, prices, discounts, taxes, category, stock/location, parent/variant, and

Validate barcode uniqueness, prices, discounts, taxes, category, stock/location, parent/variant, and account relationships.

Step 5: Review the entire grid

Step 6: Save once

Step 7: Preserve validation/errors and check for partial commits

Check your work

Compare every approved before/after row and test representative Item, POS, Purchase, stock, tax, and report behavior.

> Take a moment to check your work before closing the window. This small check can save time later.

If something goes wrong

- Do not paste columns from a differently sorted sheet.
- Restore if partial persistence cannot be reconciled.

Related guides

- Bulk Update Items
- Import Items
- Update an Item Safely

What to do next

Bulk Update Items.

Bulk Delete Items

Bulk Delete Items

Overview

This guide will help you remove only the specifically approved, unused item records while preserving stock and transaction integrity.

Multiple masters and potentially related detail rows can be removed. Recovery may require database restore.

Who can do this

You need access to Item Bulk Delete/Item Delete and clear approval identifying the item set.

Before you start

Back up and restore-test the database. Export exact IDs. Prove zero stock and no transactions, orders, BOMs, variants, prices, serials, batches, integrations, or required history.

> Before saving, check that the correct company is open and that you have permission to complete this task.

Where to find it

Back Office → Items & Advanced Inventory → Item Bulk Delete.

Bulk Delete Items

Step 1: Load only the approved candidates

Step 2: Compare displayed IDs/count to the signed-off list

Step 3: Re-run dependency/stock reports immediately before deletion

Step 4: Remove any unapproved row from selection

Step 5: Execute once and retain the result/error list

Step 6: Do not rerun after partial success until remaining IDs are reconciled

Check your work

Confirm only approved IDs disappeared, historical data remains valid where expected, stock/GL compare and confirm, and no orphan relationships exist.

> Take a moment to check your work before closing the window. This small check can save time later.

If something goes wrong

- Prefer deactivation/retirement where available.
- Never bulk-delete to correct stock or reduce licence counts.

Related guides

- Retire or Delete an Item Safely
- Create and Verify a Manual Backup
- Restore a Muhasib Database Safely

What to do next

> **Retire or Delete an Item Safely**.

Inventory Transactions

Adjust, transfer, receive, requisition, audit, forecast, and verify inventory.

Create an Inventory Adjustment

How to Create an Inventory Adjustment in Muhasib ERP

Overview

This guide will help you record an approved stock increase or decrease for a documented physical difference.

Muhasib changes on-hand stock and may create valuation/general-ledger entries.

Who can do this

You need access to Inventory Adjustment plus item, location, batch/serial, cost, and approval.

Before you start

Complete a physical count and confirm item, unit, location, batch/serial, system quantity, actual quantity, reason, cost basis, date, and approval.

> Before saving, check that the correct company is open and that you have permission to complete this task.

Where to find it

Back Office → Items & Advanced Inventory → Inventory Adjustment.

Create an Inventory Adjustment

Step 1: Start a new adjustment and enter date/reference

Step 2: Select the item and exact stock identity

Step 3: Confirm system quantity

Step 4: Enter the approved increase/decrease or corrected quantity as the form

Enter the approved increase/decrease or corrected quantity as the form requires.

Step 5: Enter reason and cost/account details where available

Step 6: Review direction and resulting quantity

Step 7: Save once

Check your work

Compare and Confirm adjustment document, stock ledger, item/location/batch/serial balance, valuation, and general ledger.

> Take a moment to check your work before closing the window. This small check can save time later.

If something goes wrong

- Never use adjustment to replace a missing source transaction.
- Search for the reference before retrying.

Related guides

- Correct or Reverse an Inventory Adjustment

- Audit Item Inventory
- Reconcile the Stock Ledger to Physical Stock

What to do next

> **Correct or Reverse an Inventory Adjustment**.

Correct or Reverse an Inventory Adjustment

Correct or Reverse an Inventory Adjustment

Overview

This guide will help you correct an wrong adjustment while preserving stock and accounting audit trails.

Muhasib reverses or updates the adjustment according to its rules and recalculates affected balances.

Who can do this

You need access to Inventory Adjustment update/reversal and affected period.

Before you start

Identify the original document, current stock, later movements, valuation effect, correct result, reason, and approval.

> Before saving, check that the correct company is open and that you have permission to complete this task.

Where to find it

Open Stock Adjustment Inquiry/report and locate the original adjustment.

Correct or Reverse an Inventory Adjustment

Step 1: Confirm the original adjustment and downstream movements

Step 2: Update only safe descriptive fields where permitted

Step 3: Use the authorized reversal/cancel workflow for quantity, direction, stock identity,

Use the authorized reversal/cancel workflow for quantity, direction, stock identity, or cost errors.

Step 4: Record reason and approval reference

Step 5: Create one correct replacement when required

Step 6: Reconcile stock and accounts after correction

Check your work

Confirm original status, correction link, replacement, stock ledger, valuation, and general ledger.

> Take a moment to check your work before closing the window. This small check can save time later.

If something goes wrong

- Do not hide the error with an unrelated adjustment.
- Escalate when later stock movements or a closed period block correction.

Related guides

- Create an Inventory Adjustment

- Review Stock and Item Change History
- Reconcile the Stock Ledger to Physical Stock

What to do next

> **Create an Inventory Adjustment**.

Transfer Stock Between Locations

How to Transfer Stock Between Locations in Muhasib ERP

Overview

This guide will help you move authorized stock from one location to another with traceable source and destination quantities.

Muhasib reduces source stock and increases destination or in-transit stock according to settings.

Who can do this

You need access to Stock Transfer plus source/destination location, item, batch, and serial.

Before you start

Confirm source availability, destination, items, units, quantities, batches/serials, transfer date, reference, carrier/handler, and approval.

> Before saving, check that the correct company is open and that you have permission to complete this task.

Where to find it

Back Office → Items & Advanced Inventory → Stock Transfer.

Transfer Stock Between Locations

Step 1: Start a transfer and select source and destination locations

Step 2: Enter date and unique reference

Step 3: Add items and transfer quantities

Step 4: Confirm units, batches, serials, and source availability

Step 5: Add handling/dispatch notes

Step 6: Review that source and destination differ

Step 7: Save once and print the transfer document if required

Check your work

Compare and Confirm transfer document, dispatch/receipt, source, destination/in-transit balances, batches, serials, and ledger.

> Take a moment to check your work before closing the window. This small check can save time later.

If something goes wrong

- Do not transfer unavailable or mismatched serial stock.
- Check for an existing transfer before retrying.

Related guides

- Receive and Verify a Stock Transfer
- Correct or Reverse a Stock Transfer
- Review Stock by Location, Batch, and Serial

What to do next

> **Receive and Verify a Stock Transfer**.

Receive and Verify a Stock Transfer

How to Receive and Verify a Stock Transfer in Muhasib ERP

Overview

This guide will help you check that dispatched stock reached the intended destination and resolve discrepancies safely.

The transfer is verified or completed, and destination/in-transit balances should reflect accepted stock.

Who can do this

You need access to Stock Transfer view/receive access and destination-location inquiry rights.

Before you start

Have the transfer document, physical delivery, item/batch/serial count, receiver identity, and discrepancy procedure.

> Before saving, check that the correct company is open and that you have permission to complete this task.

Where to find it

Back Office → Items & Advanced Inventory → Stock Transfer Inquiry.

Receive and Verify a Stock Transfer

Step 1: Locate the transfer by document/reference

Step 2: Confirm source, destination, dispatch date, and status

Step 3: Count received items by unit, batch, and serial

Step 4: Use the receipt/complete action if the runtime provides one

Step 5: Record shortages, excess, or damage through approved correction rather than

Record shortages, excess, or damage through approved correction rather than forcing receipt.

Step 6: Retain receiver confirmation

Check your work

Match physical receipt to document and confirm status plus source, destination, and in-transit balances.

> Take a moment to check your work before closing the window. This small check can save time later.

If something goes wrong

- Do not confirm receipt before physical verification.
- If no receipt action exists, document that the deployment posts transfers immediately.

Related guides

- Transfer Stock Between Locations

- Correct or Reverse a Stock Transfer
- Review Inventory Movement and Valuation

What to do next

> **Transfer Stock Between Locations**.

Correct or Reverse a Stock Transfer

Correct or Reverse a Stock Transfer

Overview

This guide will help you correct a transfer error without leaving source, destination, batch, or serial balances inconsistent.

Muhasib adjusts the transfer chain and related stock balances according to its rules.

Who can do this

You need access to Stock Transfer update/reversal and both location scopes.

Before you start

Identify original transfer, receipt/status, later movements, physical stock, correct result, reason, and approval.

> Before saving, check that the correct company is open and that you have permission to complete this task.

Where to find it

Open Stock Transfer Inquiry and locate the original transfer.

Correct or Reverse a Stock Transfer

Step 1: Confirm original status and physical movement

Step 2: Review source/destination and later stock transactions

Step 3: Update only safe descriptive fields where permitted

Step 4: Reverse/cancel through the authorized workflow for stock-impacting errors

Step 5: Create a correct replacement only when physical movement supports it

Step 6: Reconcile both locations

Check your work

Confirm original status, replacement, source/destination/in-transit quantities, batches, serials, and ledger.

> Take a moment to check your work before closing the window. This small check can save time later.

If something goes wrong

- Never correct one location without the other.
- Escalate if destination stock has already been consumed or sold.

Related guides

- Transfer Stock Between Locations
- Receive and Verify a Stock Transfer
- Reconcile the Stock Ledger to Physical Stock

What to do next

> **Transfer Stock Between Locations**.

Create a Requisition Request

How to Create a Requisition Request in Muhasib ERP

Overview

This guide will help you request authorized stock or purchasing action through a requisition.

Muhasib records a request for review; it should not be assumed to move stock or create a purchase automatically.

Who can do this

You need access to Requisition Request plus item/location and needed approval.

Before you start

Confirm requesting/destination location, items, quantities, required date, purpose, available stock, and approval route.

> Before saving, check that the correct company is open and that you have permission to complete this task.

Where to find it

Back Office → Items & Advanced Inventory → Requisition Request, when visible.

Create a Requisition Request

Step 1: Start a requisition and select requester/location

Step 2: Enter request and required dates

Step 3: Add items, units, and requested quantities

Step 4: Review available stock and business justification

Step 5: Add reference/notes and submit or save once

Step 6: Record the requisition number for follow-up

Check your work

Confirm the requisition appears once with correct requester, items, quantities, date, and status.

> Take a moment to check your work before closing the window. This small check can save time later.

If something goes wrong

- If the feature is hidden, do not present it as available without product-owner confirmation.
- Search for the request before retrying.

Related guides

- Review and Progress a Requisition
- Transfer Stock Between Locations
- Create a Purchase Order

What to do next

> **Review and Progress a Requisition**.

Reconcile the Stock Ledger to Physical Stock

How to Reconcile the Stock Ledger to Physical Stock in Muhasib ERP

Overview

This guide will help you explain and resolve differences between the Muhasib stock ledger and a controlled physical count.

The variance is explained or corrected with a documented transaction trail.

Who can do this

You need access to Stock Ledger and transaction inquiry access; adjustment rights only for authorized corrections.

Before you start

Freeze or control movements, define the count cutoff, complete a physical count, and keep system and count evidence.

> Before saving, check that the correct company is open and that you have permission to complete this task.

Where to find it

Back Office → Items & Advanced Inventory → Stock Ledger Report.

Reconcile the Stock Ledger to Physical Stock

Step 1: Set company, location, item, and cutoff date/time

Step 2: Confirm opening quantity

Step 3: Trace purchases, sales, returns, transfers, adjustments, and production movements

Step 4: Reconcile unit, batch, and serial identities

Step 5: Identify timing, duplication, omission, or classification differences

Step 6: Correct the source transaction where possible; use an approved adjustment

Correct the source transaction where possible; use an approved adjustment only for a genuine count difference.

Check your work

Re-run the ledger and confirm calculated closing stock equals the approved physical/control quantity.

> Take a moment to check your work before closing the window. This small check can save time later.

If something goes wrong

- Do not start with an adjustment before investigating source documents.
- Include backdated and in-transit transactions in cutoff analysis.

Related guides

- Create an Inventory Adjustment
- Review Stock by Location, Batch, and Serial
- Review Inventory Movement and Valuation

What to do next

> **Create an Inventory Adjustment**.

Investigate Low or Expired Stock

Investigate Low or Expired Stock

Overview

This guide will help you identify low, expired, or near-expiry stock and assign an appropriate replenishment or control action.

Inventory exceptions have a defined operational response; the report itself does not execute that response.

Who can do this

You need access to Low Stock and Expired Stock report access plus relevant item/location scope.

Before you start

Confirm reorder thresholds, lead times, expiry policy, usable locations, batch dates, reservations, and pending supply.

> Before saving, check that the correct company is open and that you have permission to complete this task.

Where to find it

Back Office → Items & Advanced Inventory → Low Stock Report or Expired Stock Report.

Investigate Low or Expired Stock

Step 1: Select company, location, and cutoff date

Step 2: Run the low-stock or expired-stock view

Step 3: Confirm item, batch, on-hand/available quantity, threshold, and expiry date

Step 4: Check pending purchase, transfer, requisition, sale, and production demand

Step 5: Classify each exception for replenish, transfer, quarantine, return, dispose, or

Classify each exception for replenish, transfer, quarantine, return, dispose, or master-data correction.

Step 6: Record owner and due date outside the report if no

Record owner and due date outside the report if no action tracking exists.

Check your work

Re-run after approved transactions and confirm resolved exceptions disappear or show the intended status.

> Take a moment to check your work before closing the window. This small check can save time later.

If something goes wrong

- Validate batch dates and thresholds before acting.
- Do not sell or transfer expired stock contrary to policy.

Related guides

- Forecast Available and Bundled Stock
- Create a Purchase Order

- Transfer Stock Between Locations

What to do next

> **Forecast Available and Bundled Stock**.

Forecast Available and Bundled Stock

Forecast Available and Bundled Stock

Overview

This guide will help you estimate available stock and bundle/manufacturing capacity from current stock and expected movements.

You get a planning estimate; no purchase, transfer, or production transaction is created automatically unless system confirms it.

Who can do this

You need access to Forecast report access plus item/BOM and scoped stock visibility.

Before you start

Confirm BOMs, units, component stock, reservations, open orders, expected receipts, locations, and forecast date/horizon.

> Before saving, check that the correct company is open and that you have permission to complete this task.

Where to find it

Back Office → Items & Advanced Inventory or Dashboards & BI → needed forecast report.

Forecast Available and Bundled Stock

Step 1: Select company, location, item/bundle, and forecast horizon

Step 2: Review current on-hand and available quantities

Step 3: Review expected demand and supply included by the report

Step 4: For bundles, identify the limiting component and unit conversions

Step 5: Test alternate location or horizon filters where appropriate

Step 6: Export the result with its filters and generation time

Check your work

Sample forecast quantities against current stock, BOM component ratios, open orders, and expected receipts.

> Take a moment to check your work before closing the window. This small check can save time later.

If something goes wrong

- Treat missing or stale BOM/order data as a forecast-quality issue.
- Do not interpret forecast quantity as physically available stock.

Related guides

- Create an Item Bill of Materials
- Investigate Low or Expired Stock
- Create a Production Order

What to do next

Create an Item Bill of Materials.

Create a Basic Service or Non-Stock Item

How to Create a Basic Service or Non-Stock Item in Muhasib ERP

Overview

This guide will help you create an item or service that can be selected in transactions without maintaining inventory quantity.

The item becomes selectable in allowed sales/purchase workflows without ordinary on-hand stock control.

Who can do this

You need access to Item and Item Add, plus supporting master permissions when creating missing units/categories/taxes.

Before you start

Create the unit, category, brand, taxes, and GL accounts as needed. Decide barcode/SKU, pricing, discount, commission, and digital-invoicing fields.

> Before saving, check that the correct company is open and that you have permission to complete this task.

Where to find it

Back Office → Items & Advanced Inventory → Manage Items.

Create a Basic Service or Non-Stock Item

Step 1: Choose New Record

Step 2: Enter a unique Barcode and Item Name; add SKU, UPC, and Description

Step 3: Select Unit of Measure, Category, and Brand as applicable

Select Unit of Measure, Category, and Brand as needed.

Step 4: Keep inventory/stock tracking disabled for a true non-stock item

Step 5: Enter Selling Price, minimum price, discount, taxes, and commission

Step 6: Map Sales/other required accounts when Financials is enabled

Step 7: Enter applicable digital-invoicing fields

Enter needed digital-invoicing fields.

Step 8: Choose Save

Check your work

Use it on a disposable transaction and confirm price, tax, discount, commission, revenue posting, and absence of stock movement.

> Take a moment to check your work before closing the window. This small check can save time later.

If something goes wrong

- Do not classify a physical product as non-stock merely to bypass unavailable quantity.

Related guides

- Create a Stocked Item
- Configure Item Pricing, Discount, Tax, and Commission
- Assign Item Accounting Accounts

What to do next

> **Create a Stocked Item**.

Create a Stocked Item

How to Create a Stocked Item in Muhasib ERP

Overview

This guide will help you create an item whose quantity is tracked by Muhasib at an approved location.

Purchases, sales, returns, transfers, adjustments, and manufacturing can change the item's stock and financial balances.

Who can do this

You need access to Item and Item Add, plus Location, Unit, Category, Tax, and Financials permissions as used.

Before you start

Create the unit, category, brand, default location, taxes, and accounting mappings. Decide batch, serial, overselling, reorder, pricing, and opening-stock policy.

> Before saving, check that the correct company is open and that you have permission to complete this task.

Where to find it

Back Office → Items & Advanced Inventory → Manage Items.

Create a Stocked Item

Step 1: Choose New Record

Step 2: Enter unique Barcode, Item Name, SKU/UPC, and Description

Step 3: Select Unit, Category, and Brand

Step 4: Enable stock/inventory tracking

Step 5: Select Default Stock Location and set Re-Order Level

Step 6: Configure serialization, batch, and overselling only according to approved policy

Step 7: Configure price, discount, tax, commission, and accounts

Step 8: Choose Save

Step 9: When prompted to add opening stock, continue only with an

When prompted to add opening stock, continue only with an approved reconciled opening balance.

Check your work

Confirm item details, zero/opening stock, location, stock report/ledger, and accounting setup before live use.

> Take a moment to check your work before closing the window. This small check can save time later.

If something goes wrong

- Do not enable serialization experimentally.
- Do not enter opening stock without source documents and checking.

Related guides

- Create Item Opening Stock
- Enable and Maintain Item Serials
- Review Item Stock by Location and Batch
- Configure Purchase and Inventory Behavior

What to do next

> **Create Item Opening Stock**.

Create Item Opening Stock

How to Create Item Opening Stock in Muhasib ERP

Overview

This guide will help you enter the documented beginning quantity and cost for a new stocked item by location and batch.

Muhasib creates inventory/location records and may create accounting entries when Financials is enabled.

Who can do this

You need access to Item/Opening Stock access plus relevant inventory and financial permissions.

Before you start

Create an active fiscal year, item, units, locations, batches/serials, and accounting mappings. Get an approved physical count and valuation as of one cutover date. Back up the database.

> Before saving, check that the correct company is open and that you have permission to complete this task.

Where to find it

Back Office → Items & Advanced Inventory → Manage Items → save/select stocked item → Opening Stock.

Create Item Opening Stock

Step 1: Confirm item, base unit, cutover date, and zero/current stock

Step 2: Open Item Opening Stock

Step 3: Select Location and Batch where applicable

Select Location and Batch where needed.

Step 4: Enter approved quantity and unit/total cost according to verified labels

Step 5: Enter required serials for serialized items

Step 6: Add each distinct location/batch row once

Step 7: Review totals and save

Check your work

Compare and Confirm physical count/source schedule to Stock Report, Stock Ledger, batch/serial inquiry, inventory value, journal, Account Ledger, and Trial Balance.

> Take a moment to check your work before closing the window. This small check can save time later.

If something goes wrong

- Never enter the same opening balance twice.
- Correct through the supported workflow, not a compensating unexplained adjustment.

Related guides

- Create a Stocked Item
- Create Taxed Item Opening Stock
- Review Item Stock by Location and Batch

- Create and Verify a Manual Backup

What to do next

> **Create a Stocked Item**.

Create Taxed Item Opening Stock

How to Create Taxed Item Opening Stock in Muhasib ERP

Overview

This guide will help you establish beginning inventory with its approved tax and accounting treatment.

Muhasib establishes stock and can post inventory/tax/opening-balance entries. Wrong treatment affects stock value, tax reports, and Trial Balance.

Who can do this

You need access to Taxed Opening Stock, inventory, Tax, and needed Financials permissions.

Before you start

Complete all ordinary opening-stock prerequisites, create the tax, confirm recoverable/non-recoverable tax treatment, get source documents, and back up the database.

> Before saving, check that the correct company is open and that you have permission to complete this task.

Where to find it

Back Office → Items & Advanced Inventory → Manage Items → Taxed Item Opening Stock.

Create Taxed Item Opening Stock

Step 1: Confirm item, date, unit, location, batch/serial, quantity, and pre-tax cost

Step 2: Select the approved tax and calculation basis

Step 3: Review tax amount and total valuation

Step 4: Confirm inventory, tax, opening-balance, and counter-account mappings

Step 5: Save once

Step 6: Preserve the source schedule/reference

Check your work

Compare and Confirm Stock Ledger/value, Tax Report, Journal/General Ledger, Account Ledger, and Trial Balance to the approved opening schedule.

> Take a moment to check your work before closing the window. This small check can save time later.

If something goes wrong

- Restore/correct before ordinary transactions if tax or valuation is wrong.
- Do not offset errors with an unrelated voucher.

Related guides

- Create Item Opening Stock
- Create a Tax
- Assign Item Accounting Accounts
- Prepare and Review a Trial Balance

What to do next

> **Create Item Opening Stock**.

Audit Item Inventory

How to Audit Item Inventory in Muhasib ERP

Overview

This guide will help you compare Muhasib's recorded inventory with expected movement and physical count, then isolate differences.

The audit identifies discrepancies; any update/recalculation option can mutate inventory and needs a backup and separate approval.

Who can do this

You need access to Item Inventory Audit and read access to stock/transaction reports; corrections require separate rights.

Before you start

Choose a cut-off time, freeze or account for movement, synchronize terminals, and collect physical count/detailed reports.

> Before saving, check that the correct company is open and that you have permission to complete this task.

Where to find it

Back Office → Items & Advanced Inventory → Item Inventory Audit.

Audit Item Inventory

Step 1: Select company, location, item/category, and date scope

Step 2: Run the audit/calculation without changing data where possible

Step 3: Compare opening, purchases/receipts, sales/issues, returns, transfers, adjustments, WIP, and closing

Compare opening, purchases/receipts, sales/issues, returns, transfers, adjustments, WIP, and closing quantity.

Step 4: Separate timing, unit, batch, serial, and pending-sync differences

Step 5: Document unexplained variance

Step 6: Correct only through the supported source transaction or approved adjustment

Check your work

Stock Report, Stock Ledger, movement report, batch/serial totals, and physical count compare and confirm for the same scope.

> Take a moment to check your work before closing the window. This small check can save time later.

If something goes wrong

- Do not combine different cut-off times or quantity definitions.
- Do not run Day End recalculation as an unexplained fix.

Related guides

- Review Item Stock by Location and Batch
- Audit Item Stock Using Excel
- Create an Inventory Adjustment
- Complete Day-End Activity Safely

What to do next

> **Review Item Stock by Location and Batch**.

Audit Item Stock Using Excel

How to Audit Item Stock Using Excel in Muhasib ERP

Overview

This guide will help you use the Excel audit workflow to compare a controlled physical count with Muhasib stock.

The Excel workflow can compare or potentially update inventory depending on the active implementation. Do not assume it is read-only.

Who can do this

You need access to Excel inventory-audit access and report/export rights; any correction requires inventory-adjustment approval.

Before you start

Freeze/count stock at a defined cut-off, use a protected file location, and preserve the original export unchanged.

> Before saving, check that the correct company is open and that you have permission to complete this task.

Where to find it

Back Office → Items & Advanced Inventory → Item Inventory Audit (Excel).

Audit Item Stock Using Excel

Step 1: Export the target-build audit template/data

Step 2: Preserve IDs, headers, units, locations, and batches

Step 3: Enter physical counts only in approved columns

Step 4: Validate formulas, decimal separators, and row alignment

Step 5: Import/compare in a snapshot first

Step 6: Review every variance

Step 7: Create supported adjustments separately when approved

Check your work

Match file rows to item/location/batch records and compare and confirm resulting variances/adjustments with Stock Ledger.

> Take a moment to check your work before closing the window. This small check can save time later.

If something goes wrong

- Never sort one column independently.
- Do not reuse an old export after stock movement.

Related guides

- Audit Item Inventory
- Create an Inventory Adjustment
- Import Item Stock

What to do next

Audit Item Inventory.

Inquiries

Review stock by item, location, batch, serial, movement, valuation, history, and forecast.

Review and Progress a Requisition

How to Review and Progress a Requisition in Muhasib ERP

Overview

This guide will help you review a requisition and move it through the authorized fulfillment or rejection path.

Muhasib updates the request status and may link a fulfillment transaction; automatic stock or purchase creation must not be assumed.

Who can do this

You need access to Requisition Inquiry plus the needed approve, reject, transfer, or purchase rights.

Before you start

Confirm request number, requester, need, available stock, purchasing alternative, quantities, dates, budget, and approval authority.

> Before saving, check that the correct company is open and that you have permission to complete this task.

Where to find it

Back Office → Items & Advanced Inventory → Requisition Inquiry.

Review and Progress a Requisition

Step 1: Locate and open the requisition

Step 2: Confirm requester, location, items, quantities, required date, and current status

Step 3: Review available stock and outstanding supply

Step 4: Approve, reject, or return it according to policy

Step 5: Create or link the authorized transfer/purchase action when supported

Step 6: Record notes and save the status change once

Check your work

Confirm status history, approver, quantities, notes, and any linked transfer or purchase order.

> Take a moment to check your work before closing the window. This small check can save time later.

If something goes wrong

- Do not approve unavailable quantities without a supply plan.
- If status actions are absent, confirm feature activation and permission.

Related guides

- Create a Requisition Request
- Transfer Stock Between Locations
- Create a Purchase Order

What to do next

Create a Requisition Request.

Review Stock by Location, Batch, and Serial

How to Review Stock by Location, Batch, and Serial in Muhasib ERP

Overview

This guide will help you determine where a specific item is held and which batch or serial identities are available.

You have a scoped stock position suitable for fulfillment or investigation, not a substitute for a physical count.

Who can do this

You need access to Stock inquiry/report access and authorized item/location scope.

Before you start

Know the company, item, unit, location, batch, serial, and as-of date relevant to the question.

> Before saving, check that the correct company is open and that you have permission to complete this task.

Where to find it

Back Office → Items & Advanced Inventory → Stock Report, Item Batch Report, or Detailed Stock Report.

Review Stock by Location, Batch, and Serial

Step 1: Select the intended company and as-of date

Step 2: Filter to the exact item

Step 3: Narrow by location, batch, expiry, or serial as needed

Step 4: Distinguish on-hand, reserved, in-transit, forecast, and available quantities where shown

Step 5: Drill into the stock ledger for unexpected values

Step 6: Export or print only after confirming filters

Check your work

Cross-check totals across location/batch/serial details and sample against physical stock or source transactions.

> Take a moment to check your work before closing the window. This small check can save time later.

If something goes wrong

- Clear hidden filters when totals seem incomplete.
- Confirm unit conversions before comparing quantities.

Related guides

- Reconcile the Stock Ledger to Physical Stock
- Review Inventory Movement and Valuation

- Modify Item Batches

What to do next

> **Reconcile the Stock Ledger to Physical Stock**.

Review Inventory Movement and Valuation

How to Review Inventory Movement and Valuation in Muhasib ERP

Overview

This guide will help you explain quantity and value changes for an item or inventory scope over a selected period.

You get an explained inventory roll-forward and identify mismatches for source-level correction.

Who can do this

You need access to Inventory report access; cost visibility may require separate permission.

Before you start

Know the company, date range, locations, items/categories, costing policy, and opening control totals.

> Before saving, check that the correct company is open and that you have permission to complete this task.

Where to find it

Back Office → Items & Advanced Inventory → Inventory Movement Report or Detailed Stock Report.

Review Inventory Movement and Valuation

Step 1: Set the exact date range and stock scope

Step 2: Capture opening quantity and value

Step 3: Review inflows and outflows by transaction family

Step 4: Drill into unexpected cost or quantity movements

Step 5: Confirm closing quantity and value calculations

Step 6: Compare valuation to relevant general-ledger control accounts

Check your work

Confirm opening plus inflows minus outflows equals closing for quantity and value, subject to the set up costing method.

> Take a moment to check your work before closing the window. This small check can save time later.

If something goes wrong

- Confirm report date semantics and cost visibility before comparing totals.
- Investigate backdated transactions and negative stock as valuation risks.

Related guides

- Reconcile the Stock Ledger to Physical Stock
- Review Stock and Item Change History
- Trace a Source Transaction into the General Ledger

What to do next

Reconcile the Stock Ledger to Physical Stock.

Review Stock and Item Change History

How to Review Stock and Item Change History in Muhasib ERP

Overview

This guide will help you identify when and by whom stock, batch, cost, or selling-price information changed.

You get a traceable explanation or a focused exception for further investigation.

Who can do this

You need access to Relevant inventory and history-report.

Before you start

Know the item, location, batch, document/reference, suspected date range, and type of change.

> Before saving, check that the correct company is open and that you have permission to complete this task.

Where to find it

Back Office → Items & Advanced Inventory → the needed inquiry or change-history report.

Review Stock and Item Change History

Step 1: Select the narrowest practical date and company scope

Step 2: Filter by item, location, batch, user, or document where supported

Step 3: Compare old/new values or transaction direction

Step 4: Open the source document when drill-down is available

Step 5: Correlate timestamp and user with User Activity where necessary

Step 6: Preserve filtered output as investigation evidence

Check your work

Confirm history details agree with source documents, current master/stock state, and authorized change evidence.

> Take a moment to check your work before closing the window. This small check can save time later.

If something goes wrong

- Absence from one history report does not prove no change occurred; check source transactions and user activity.
- Confirm server date/time and company scope.

Related guides

- Correct or Reverse an Inventory Adjustment
- Correct or Reverse a Stock Transfer
- Review User Activity

What to do next

Correct or Reverse an Inventory Adjustment.

Review Item Stock by Location and Batch

How to Review Item Stock by Location and Batch in Muhasib ERP

Overview

This guide will help you check where an item's recorded quantity is held and how batches/serials contribute to availability.

The inquiry/report identifies records to investigate; it does not itself correct stock.

Who can do this

You need access to Item/stock inquiry or report access; batch/serial details may require separate features.

Before you start

Know the item, company, locations, units, batch/serial policy, and as-of date/business question.

> Before saving, check that the correct company is open and that you have permission to complete this task.

Where to find it

Back Office → Items & Advanced Inventory → Manage Items → Item Stock, or Stock/Batch/Ledger reports.

Review Item Stock by Location and Batch

Step 1: Select the exact item

Step 2: Review quantity by location

Step 3: Expand batch and serial detail where enabled

Step 4: Distinguish on-hand, available, reserved, forecasted, and reorder quantities according to

Distinguish on-hand, available, reserved, forecasted, and reorder quantities according to verified labels.

Step 5: Compare with Stock Ledger movements for the same scope/date

Step 6: Investigate differences before adjusting stock

Check your work

Opening + receipts + transfers in − issues/sales/transfers out ± adjustments/returns/WIP should compare and confirm to the shown balance under the report's definitions.

> Take a moment to check your work before closing the window. This small check can save time later.

If something goes wrong

- Match company, location, terminal, batch, unit, and date filters.
- Do not adjust until timing and pending sync are excluded.

Related guides

- Review the Stock Ledger Report
- Review the Inventory Movement Report

- Create an Inventory Adjustment
- Modify Item Batches

What to do next

> **Review the Stock Ledger Report**.

Reports

Analyze inventory levels, movements, transfers, adjustments, batches, costs, prices, and forecasts.

Troubleshooting

Resolve item, unit, batch, serial, stock, transfer, import, and valuation problems.