



The following video will show how to receive empty keg shells into inventory and handle the deposit credit to the customer.

A downloadable PDF version can be found here: [Keg Management](#)

## Setting Up Credit & Deposit Items

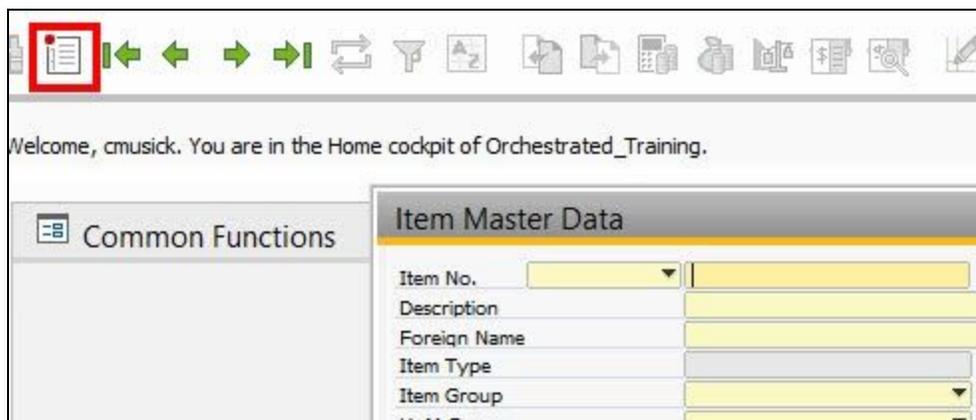
Credits and deposits should be separate items created in your Orchestrated database. You should have a credit and deposit item for every type of finished good you charge for. See below.

#	Item No.	Item Description	Item Group	Process Type	In Stock	Pack Type
1	19950-K12-Credit	Credit - 1/2BBL Keg	Deposit/Credit: Kegs	None	0.00	
2	19950-K12-Deposit	Deposit - 1/2BBL Keg	Deposit/Credit: Kegs	None	0.00	
3	19950-K16-Credit	Credit - 1/6BBL Keg	Deposit/Credit: Kegs	None	0.00	
4	19950-K16-Deposit	Deposit - 1/6BBL Keg	Deposit/Credit: Kegs	None	0.00	

To create these items, follow these instructions:

1) Go to *Item Master Data* [Inventory > Item Master Data]

2) Switch to *Add* mode [Ctrl + A] or [icon at the top of your screen, see image below]



3) Once in *Add* mode, start filling out the following fields.

- Item No.: We normally set them as 19950-packtype for deposits and 19955-packtype for credits, but this code is up to you - just stay *consistent*
- Description: This is what you want the item to show up on documents
- Item Group: Set this to *Deposit/Credit: Kegs*. If you get a message asking "*Do you want to update the item information (including UoM group) according to the selected item group?*" say *yes*.
- Check boxes up in the right hand corner - only check off *Sales Item*. You are not going to keep track of these credits and deposits in stock, that is what keg shells are for.

Your screen should look something like this.



**Item Master Data**

Item No. Manual 19950-K12  Inventory Item  
Description Keg Deposit - 1/2BBL  Sales Item  
Foreign Name  Purchase Item  
Item Type Items  
Item Group Deposit/Credit: Kegs Pack Type  
UoM Group Manual Bar Code  
Price List CA-North Unit Price Primary Curr  
Process Type Brand

General Purchasing Data Sales Data **Inventory Data** Planning Data Production Data Properties Remarks Batches Attachments

Tax Liable  
 Do Not Apply Discount Groups  
Manufacturer - No Manufacturer -  
Additional Identifier  
Shipping Type Distributor Truck  
Serial and Batch Numbers  
Manage Item by None

Active From To Remarks  
 Inactive  
 Advanced  
TTB Group

Add Cancel

4) Now jump to the *Inventory Data* tab.

5A) Add a warehouse (should be your main warehouse) to the list of *allowable* warehouses.

5B) Highlight the warehouse row by clicking on the row number next to it.

5C) Click *Set Default Whse* in the bottom right corner.



See below.

#	Whse Code	Whse Name	Locked	In Stock	Committed	Ordered	Available
1	A1	Main Warehouse	<input type="checkbox"/>				
2			<input type="checkbox"/>				
3							
4							
5							
6							
7							
8							
9							
10							

7) These are all of the settings that need to be changed. The item is ready to be added in - hit the *Add* button in the bottom left corner.

8) Repeat for the remaining deposit/credit items needed.

A trick to getting them created a little quicker, is to *Duplicate* the one you just created and just change the *Item No.* and the *Description*. If you'd like to use this trick, just find the item you just created. Now right-click somewhere in the open area on the record and select *Duplicate*. This should create a new record on your screen. Since this is essentially the same item, all you need to do is change the *Item No.* and *Description* at the top. Now hit *Add*. All done!



These items that you just created, should be treated as regular sales type items. This means that you will need to set a *price* for them on your *Price List(s)*.

### Returned Kegs

- Apply Credit to a Customer
- Bring Keg Shells Back into Inventory
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