

# SUPPORT DOCUMENT

Container Items



***palladium***  
Accounting

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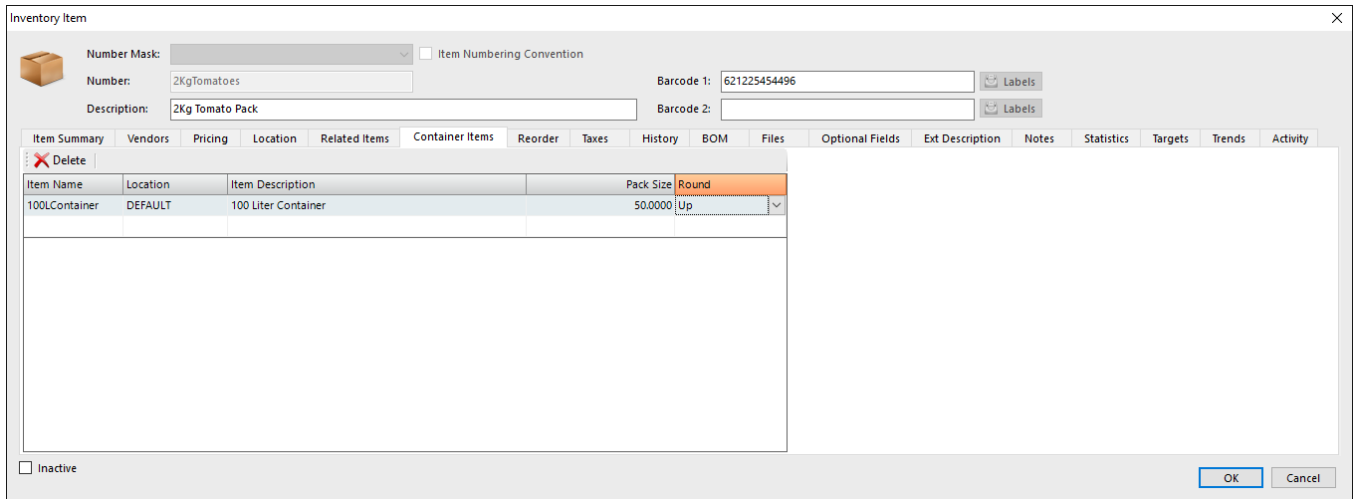
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## Overview

The purpose of this feature is to remind users to add “Container Items” when invoicing bulk items whether at a value or at no charge to manage their Container Inventory. This feature works similarly to Upsell Items where users are reminded to Invoice or recommend X number of “related items” per Y number of the Primary Item.

## Setup

To setup Container Items, go to **Inventory >> Maintenance** and select the Primary Item you wish to assign Container Items to, then proceed to the Container Items Tab. Once you have selected the Container Item, you must then enter the Pack Size with the option to Round Up or Down. In the example below we have entered a Pack Size of 50. This Pack Size is the Ratio to which One Container Item is Added per Qty of the Primary Item. In the example below we will recommend One Container per 50 Packs of 2 Kg Tomatoes, and round this up.



The screenshot shows the 'Inventory Item' configuration window. The 'Container Items' tab is active, displaying a table with the following data:

Item Name	Location	Item Description	Pack Size	Round
100LContainer	DEFAULT	100 Liter Container	50.0000	Up

Additional fields in the window include: Number Mask, Number (2KgTomatoes), Description (2Kg Tomato Pack), Barcode 1 (621225454496), and Barcode 2. There are also 'Labels' buttons for each barcode field. At the bottom, there is an 'Inactive' checkbox and 'OK'/'Cancel' buttons.

## Processing

This function is available in the Freehand Quotes, Sales Quote, Sales Order and Sales Invoice Functions. The system will Auto-Invoke the Container Item Screen when Creating New Documents, or during the Adjustment process, but is also available at any time using the Container Item button highlighted below. Here you will see that we Invoiced 120 Packs and the system is recommending that we add 3 containers, being the multiple of 50 rounded up.

The screenshot displays the 'Sales Order' window in Palladium Accounting. The main window shows a sales order for 'Ashburton Reinforcing' with a quantity of 120 units of '2Kg Tomatoes'. A dialog box titled 'Item Containers' is open, showing a recommendation for 3 containers of '100L Container' (Pack Size: 50.00, Quantity: 3.0000). The 'Container Items' button in the top toolbar is highlighted with a red box. The 'Qty' and 'Unit' columns in the item table are also highlighted with a red box.

Number	Location	Description	Qty	Unit	Price	Discount %	Margin %	Tax Code	Tax	Amount
1	DEFAULT	2Kg Tomato Pack	120	EA	23.89	0.00	100.00	01	401.35	2,866.80

Item Name	Location	Item Description	Pack Size	Quantity
100LContainer	DEFAULT	100 Liter Container	50.00	3.0000

Subtotal: 2,866.80  
Discount %: 0.00  
Tax: 401.35  
Total: 3,268.15