



**Course Name:** Build to Stock or Build to Order – Advanced Manufacturing and Inventory Studies in QuickBooks

**Learning Objectives:**

- 1) Identify when to use a Sales Order vs a BOM in QB manufacturing process
- 2) Describe 3 Advanced Manufacturing Processes in QuickBooks
- 3) Describe 4 additional use cases for Advanced Inventory set up in QB.

Use this instructional guide to quickly find locations of topics throughout this course. There are terms listed in this guide. Each term has the lesson video number, lesson name, and time(s) where you can find its usage in the course.

---

**Terms:**

- ❖ **Assembly Item:** Item type in QuickBooks that is used on a Build Assembly or BOM. This does have a quantity and value.
  - **Video 2** – Assembly, Groups, BOMs and Sales Orders (2:30; 4:45)
- ❖ **Build Assembly (BOM – Bill of Materials):** Transaction to assemble components into a finished good. These can be posting or pending (non posting).
  - **Video 2** – Assembly, Groups, BOMs and Sales Orders (0:30)
- ❖ **Group Item:** Item type in QuickBooks that allows multiple items to quickly be added to a transaction. This item type does not hold a quantity or value, nor can you do a Quick Report on this item type.
  - **Video 2** – Assembly, Groups, BOMs and Sales Orders (1:15; 4:15)
- ❖ **Manufacture to Order:** Type of process in the manufacturing world where you assemble your goods as they orders come in the door. Usually these are custom orders.
  - **Video 4** - Manufacturing to Order (0:00)
- ❖ **Manufacture to Stock:** Type of process in the manufacturing world where you assemble your goods ahead of time and stock them on your shelf. Usually these are not custom orders.
  - **Video 3** - Manufacturing to Stock with Overhead (0:00)
- ❖ **Sales Order:** Non-posting transaction used to drive demand for shipping out inventory or assembly items.
  - **Video 2** – Assembly, Groups, BOMs and Sales Orders (0:30)