

Understanding Case Quantity for Line Item Codes

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This guide describes the logic for case quantities for a line item code. It is intended for general users.

Case quantities for a line item code define how many items are in a case and ensures you're tracking your inventory by unit. The term "case" in aACE refers to any packaged product bundle. You can enter a value for how many items arrive in a case during procurement and how many items you sell in a case to your customers. These values populate on purchase orders (POs) and sales orders and are carried through related records.

You can set the value for a line item code's case quantity by navigating from the Main Menu > Inventory > Line Item Codes > line item code record > Setup.

The screenshot shows the 'Line Item Codes' setup page for 'Code: NTBK-011 | Lab Notebooks / Journals'. The page is divided into several sections:

- Accounting Setup:** Includes fields for Revenue Account (4010 | Textbook Sales), Cost Account (5001 | Uncategorized Cost), Inventory Account (1307 | Textbook Inventory), and Department.
- Commissions and Rate Setup:** Includes Rate Type, Rate Value (75%), VDS (green checkmark), Price (10.00), Commission Type, Comm Value, VCS, and Commission.
- Unit Info:** This section is circled in green. It contains two rows: 'Proc Case Qty' with a value of 20, and 'Sale Case Qty' with a value of 5. Other columns include UOM, UPC, HTS, GTIN, and ECCN.
- Preferences:** Includes 'Sales Entry' (Show in Code drop-down list, Print by default, Enforce rate card billing, Exclude customer discount, Enable tax automation), 'Shipping and Fulfillment' (Enable outgoing shipments, Drop ship by default, Special order by default, Do not create a sub-assembly job), and 'Time & Expenses' (Show in Code drop-down list, Non-Billable, Paid Time Off (PTO)).
- Auto-Updates:** Includes checkboxes for 'Disable updates for Product Description and Unit Cost', 'Update the Est Unit Cost to the greater of the weighted avg. of A) current inventory or B) purchasing activity within the last number of days: 0', and 'Record Access' (Accessible to all offices, Accessible to selected offices only).
- Oversight Notifications:** Includes checkboxes for 'Send notice when an order or PO is opened' and 'Send notice if sold with margin less than: 0'.
- Barcode Scanning:** Includes a field for 'Barcode input: CODE50044'.
- Finance & Accounting Additional Info:** A large empty box for additional information.

Procurement Case Quantity

The procurement case quantity is used to track how many items arrive in one case from your vendor. When you enter a value for procurement case quantity, aACE will automatically populate that value when you are creating a new PO to your vendor. For example, if a case of notebooks comes with 20 notebooks and the PO asked for one case of notebooks, the

total would be 20 notebooks ordered. However, if the PO had two cases, the total would be 40 notebooks.

Purchase Orders

Record: 2 of 2

New Edit Delete Print Actions

Purchase Order: 60009 McGullicuddy McGuire-Hall 10/31/25 PENDING

Notices Tasks Emails Docs

Vendor

McGullicuddy McGuire-Hall
Simon Bradford
382 West 38th Street
New York, NY 10018

Vendor Reference

Required By

Payment Terms

Net 30

Ship To

End Customer

Ship To >

Blind

Ship Type

Expected Date

Complete

TBD

Inventory Bin

Shipping Terms

Comments & Next Steps

Acknowledged

Next Step

Next Step Date

Description

Additional Info

PO Items

RFQ Management

Code

Description

Order

Job

Dept

Cases

Quantity

Unit Cost

Total

1

>

NTBK-011

Lab Notebooks / Journals

AI

2

40

2.50

100.00

Purchasing

Receiving

Purchase Order Type

Priority

Payment Date

Recurring Transaction >

Currency

Exchange Rate

11/30/25

USD

1

Subtotal

0.00

Shipping

0.00

Tax

0%

0.00

Total

0.00

Payment Due

0.00

Use Tax

0.00

Dept

AI

Asgn By

AH

Asgn To

DJ

Tracking Status

Cancel

Save

If a user attempts to enter a value that is between cases, such as 2.5 cases instead of two, aACE displays a warning asking to round up the case value, round down, or keep the value. This is to prevent accidentally ordering an incorrect amount of cases.

Purchase Orders

Record: 2 of 2

New Edit Delete Print Actions

Purchase Order: 60009 McGullicuddy McGuire-Hall 10/31/25 PENDING

Notices Tasks Emails Docs

Vendor

McGullicuddy McGuire-Hall
Simon Bradford
382 West 38th Street
New York, NY 10018

Vendor Reference

Required By

Payment Terms

Net 30

Ship To

End Customer

Ship To >

Blind

Ship Type

Expected Date

Complete

TBD

Inventory Bin

Shipping Terms

Comments & Next Steps

Acknowledged

Next Step

Next Step Date

Description

Additional Info

PO Items

RFQ Management

Code

Description

Order

Job

Dept

Cases

Quantity

Unit Cost

Total

1

>

NTBK-011

Lab Notebooks / Journals

AI

2.5

50

2.50

125.00

Purchasing

Receiving

Purchase Order Type

Priority

Payment Date

Recurring Transaction >

Currency

Exchange Rate

11/30/25

USD

1

Subtotal

112.50

Shipping

0.00

Tax

0%

0.00

Total

112.50

Payment Due

0.00

Use Tax

0.00

Dept

AI

Asgn By

AH

Asgn To

DJ

Tracking Status

Cancel

Save

Message

A quantity of 50 results in a case quantity of 2.5. Would you like to round up or round down to the nearest case quantity? Rounding up will result in a quantity of 60. Rounding down will result in a quantity of 40. Select 'Keep' to leave the quantity as is.

Keep

Down

Up

Sales Case Quantity

The sales case quantity is used to track how many items you sell to customers in one case. When you enter a value for sales case quantity, aACE will automatically populate that value when you are creating a new order for a customer. For example, if a case of notebooks includes 5 notebooks and the customer requested one case of notebooks, the total would be 5 notebooks sold. However, if the customer wanted two cases, the total would be 10 notebooks.

Similarly to procurement case quantity, if a user enters a value that is in between cases, aACE displays a warning message asking to round the value up, round down, or keep it.

Case Quantities on Printouts

Because case quantities vary based on vendors and customers, this field does not appear on PO and order printouts. Instead, a PO or order printout will display the total number of items rather than total number of cases.

11

1

Total

Pages

Save as Excel

Save as PDF

Print

Page Setup

Layout: PO: Detail 1 PO Print

View As:

Exit Preview



aACME Education Solutions
1238 Broadway, New York, NY 10001 (555) 418-9777

PURCHASE ORDER
McGullicuddy McGulre-Hall

Purchase Order # 60009
Date 10/31/25
Required By
Payment Terms Net 30
Account #

Vendor

McGullicuddy McGulre-Hall
Simon Bradford
382 West 38th Street
New York, NY 10018

Ship To

aACME Education Solutions, Inc.
Mark Jennings
1238 Broadway
New York, NY 10001

Phone
(555) 418-9777

Carrier Service

Purchase Order Items

Line	Description	Code	Qty	Unit Cost	Total
1	Lab Notebooks / Journals	NTBK-011	40	2.50	100.00
Subtotal					100.00
Shipping					0.00
Tax					0.00
Total					100.00
Payment Due					100.00

System administrators can [edit a print layout](https://aace6.knowledgeowl.com/help/editing-print-layouts) if this default layout does not fit your organization needs.