Direct Sidekick Inventory Cheat Sheet

If this happens:	Do this in Direct Sidekick
I place a party order, and my customer's payments are all entered into the back office.	No need to do anything in Direct Sidekick. You will enter "Income" transactions when you are paid your earnings from your company. This will include your commission from this party/sale.
My customer pays me directly for an order I place for them in my back office. Then I pay my company from my bank account or credit card on file.	Since your customer paid you directly and you deposited the funds into your bank account, enter an income transaction. Then when you pay your company for their order, enter that transaction as a "Supplies" expense.
I purchase products **only for personal use.**	This order is separate from your business and should be purchased using a personal account with nothing entered into Direct Sidekick.
I place an order to add items into my inventory for resale.	Enter a purchase in Direct Sidekick, which adds your items into your inventory with your actual costs as your item costs. This gets your items into your inventory and allows Direct Sidekick to calculate your cost of goods sold (COGS) accurately. Do not add a separate expense transaction for the purchase.

I host my own party and receive the host rewards to purchase items for my inventory.	Enter a purchase in Direct Sidekick, which adds your items into inventory. If the host credit was added to a specific item, discount that item for the credited amount. If your host credit was added to the entire balance, add the discount next to "other discount."
I received free products from my company- for example, incentives or rewards.	You have options here: 1. Enter a purchase in Direct Sidekick, using the actual SKU with the cost of $0 since it was free. 2. Do the same as above but enter it as a new SKU. For example, add "f" to the beginning or end of the actual SKU. 3. Keep the items out of your inventory, place a sticker on the items to keep them separate from the rest of your inventory. Then when you sell these items, enter an income transaction for the sale amount.
I order business supplies or samples.	Enter a "Supplies" expense in your transactions list. If business supplies or samples are added to a regular inventory purchase, enter the purchase, as usual, including these items, and uncheck the Inv. checkbox. This automatically adds a PO supply order transaction for you.
I sell items from my inventory.	Add an invoice for the sale to remove the items from your inventory. Check the "add to income" checkbox to add the total to income. The preferred method is to leave this unchecked and enter an income transaction

I sell items from my inventory (continued).	when the payment is deposited into your bank account.
I give items away for business purposes or take items from my inventory to demonstrate (in person, video, etc.).	Enter an adjustment in Direct Sidekick and choose the "demo/advertising/give away" purpose.
I remove items from my inventory for personal use.	Enter an adjustment in Direct Sidekick and choose "personal use" as the purpose.
I pay my customers shipping and/or for part of her order to give her a discount.	Enter a "supplies" transaction in the amount of the payment.

* Important note: Income and expense transactions can be automatically imported by securely connecting your accounts. Once connected, Direct Sidekick will import and categorize your transactions for you five times per day. When you connect your accounts, you will also need to delete your inventory transactions (they will show as expenses) as you enter those as purchases.