

Group Codes Setup Menu

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Group Codes Search

Group codes cater for grouping of the inventory master listing into various product groups and also is used for sales mapping purposes whereby the configuration can dictate posting of entries to respective GL Accounts.

Basic Search Tab

Allows the user to view and edit any existing group codes.

The user can also add any new group codes required.

Group Code Search

Search

Add

Edit

Delete

Print Grid

Group Code Import / Export

Basic Search

Report Grouping

Group Code:

Description:

Active:

☒

Group Code	Search by entering the code
Description	Search by entering the description
Active	Search for active group codes by ticking the box. Remove the tick to search for any deactivated group codes.
Add button	To create a new group code
Edit button	To view or make changes on the existing group code
Delete button	To delete the selected group code
Print Grid button	Returns the list of group codes in the grid based on search criteria and allows the user to print, email or export to excel.

Report Grouping Search

This tab allows the user to search and edit any existing group code groupings.

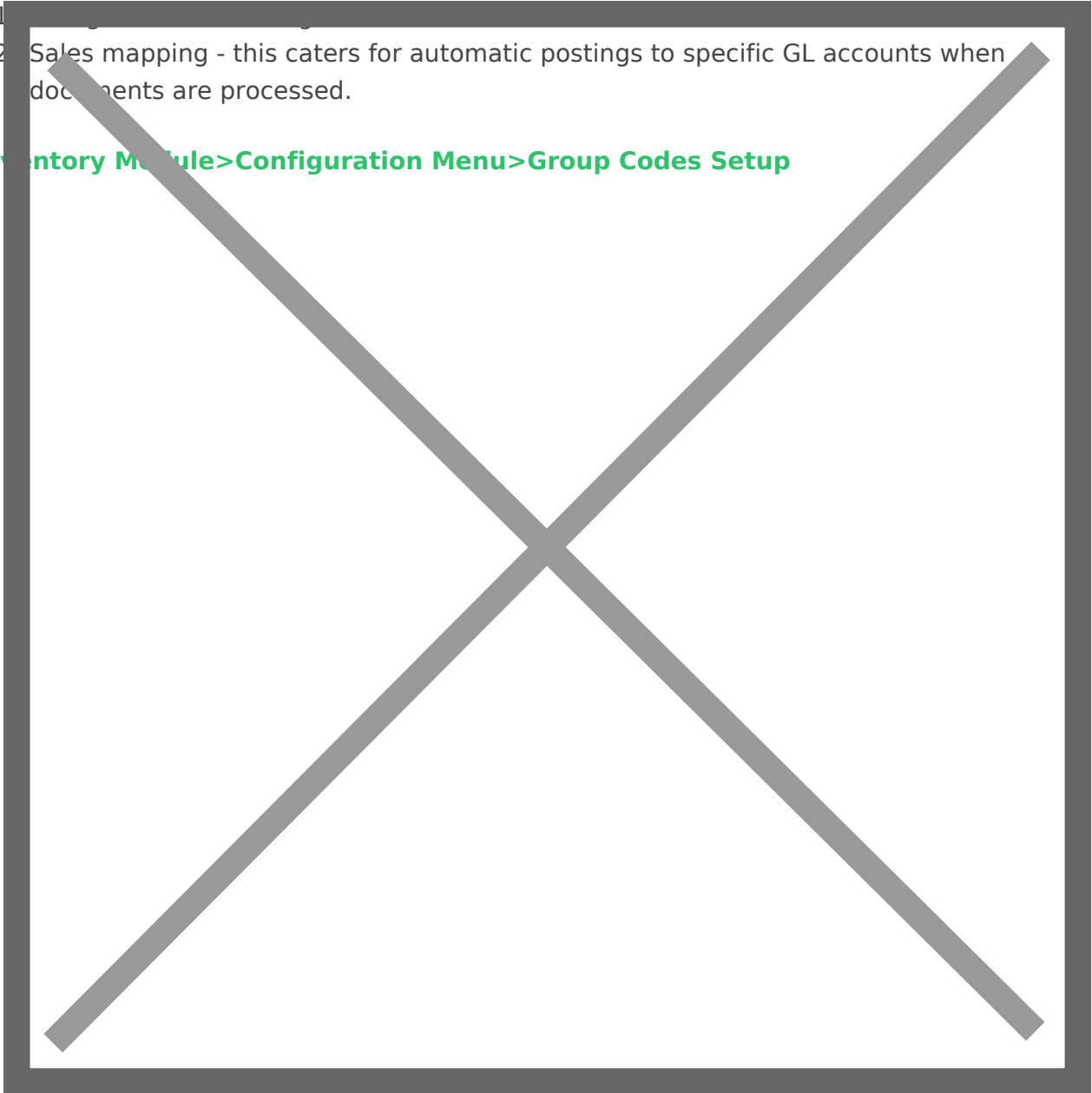
The user can also add any new groupings when accessing this tab.

Group Codes Setup

Group codes are used for the following reasons:

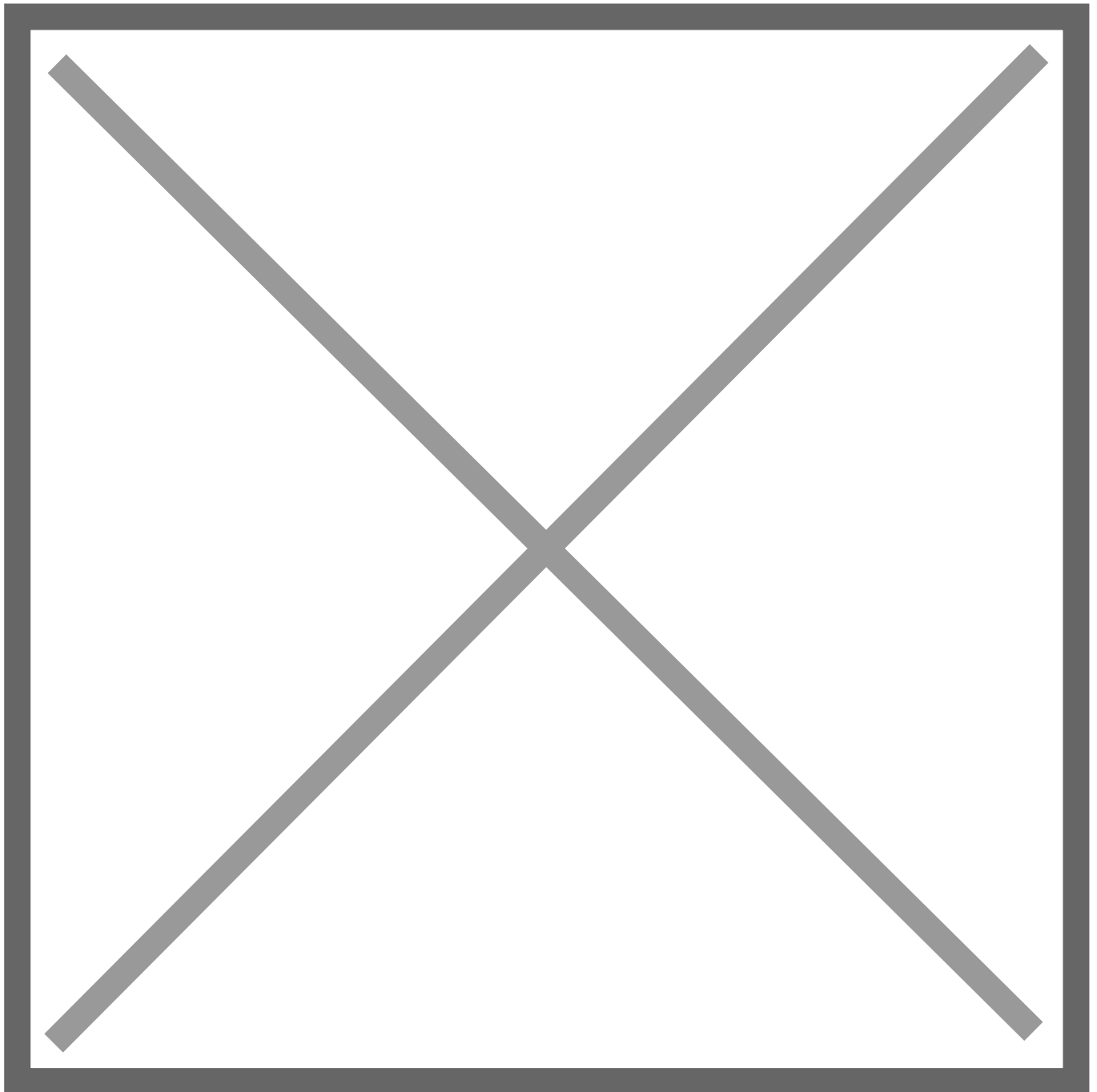
1. Sales mapping - this caters for automatic postings to specific GL accounts when documents are processed.
2. Sales mapping - this caters for automatic postings to specific GL accounts when documents are processed.

Inventory Module>Configuration Menu>Group Codes Setup



- Click search to find the existing group codes and click on edit button to edit any existing group code.

- To create a new group code, click the Add button.



Code	Enter a code of your choice
Description	Enter a description

- Click Save
- Then click the Add button on the same screen.

Manage Group Code

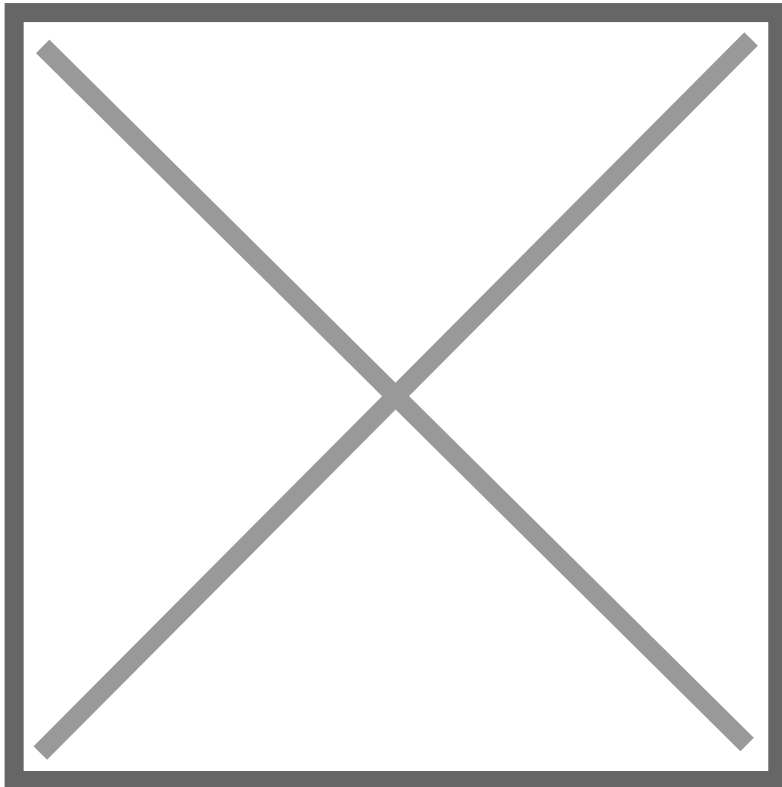
Save Add Edit Delete

Code: BB Description: Bends and Brackets

Active: ☒

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#	Branch	Sales	Cost Of Sales	Service
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Branch	if you have branches setup, you can select the respective branch for the specific group code if the group code is to be linked to multiple branches, you will need to click add a separate account postings setup linked to the relevant GL accounts for the branch.
Sales - Short Search	Select the sales account
Cost of sales - Short Search	Select the required Cost of Sales account
Custom - Short Search	Select the alternate Cost of Sales account. This is for service and Custom items.
Service - Short Search	Select the alternate Cost of Sales account. This is for service and Custom items.

To export the Group code list to excel, click on Print grid and select export.

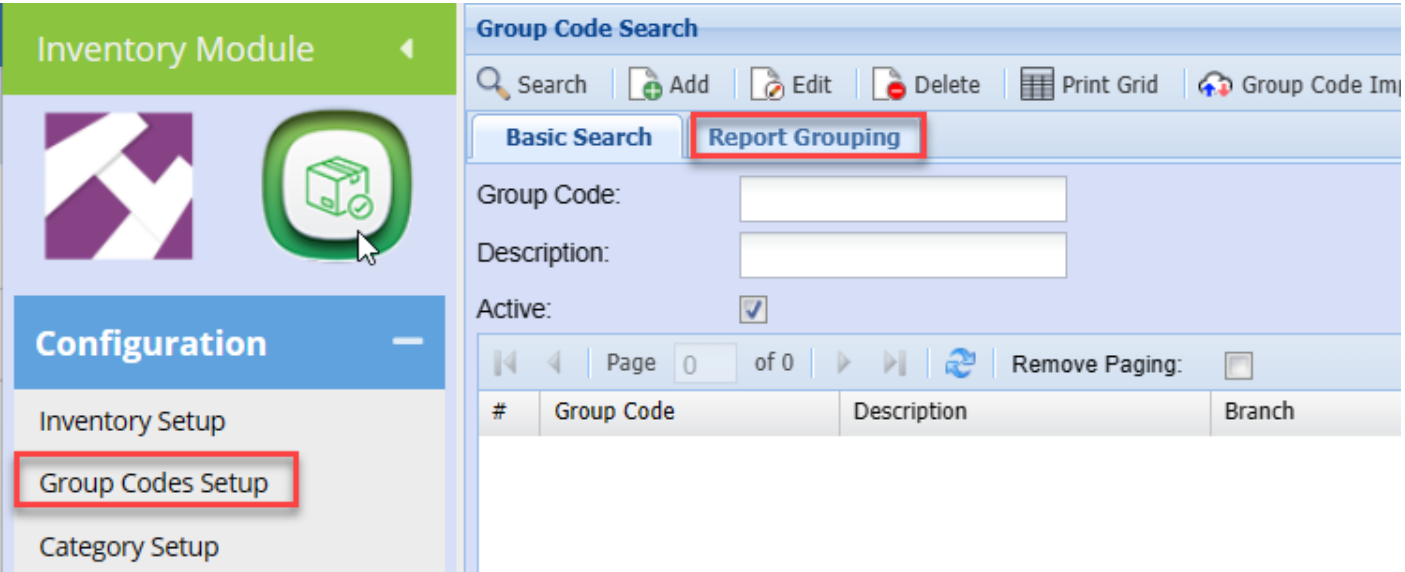
Report Grouping Setup

Report Grouping allows one to link various groups

This assists when generating reports, so that the user does not need to select multiple groups individually.

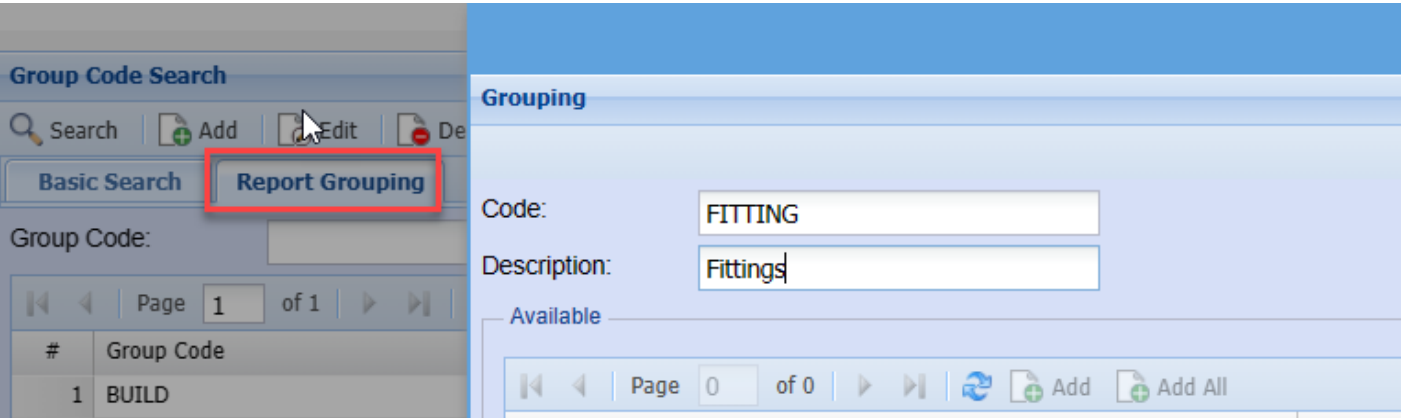
One can then simply select the grouping option and the linked group codes will automatically be selected.

To link multiple group codes, click the Report Grouping tab



Click Add

Code	Enter a code for the grouping
Description	Enter a description of the grouping



You will notice the grid is then populated with the existing group codes

You can now select respective group codes to be linked together.

In this example, we created a group: Fittings

We can now link multiple group codes to this reporting group

To link group codes, double click on the required group code in the top grid, this will then move to the bottom selected grid.

Grouping

Code:

Description:

Available

Page 1 of 1

Add Add All

Displaying 1 - 35 of

Group Code	Description
RT	Rivots
Software Adhoc	Software Adhoc
Solar	Solar Lights
Subs	Subwoofer
SUN	SUNGALSES
SW	Screws

Grouping

Code:

Description:

Available

Page 1 of 1 | Add | Add All

Group Code	Description
RAW	RAW Materials
Software Adhoc	Software Adhoc
Solar	Solar Lights
Subs	Subwoofer
SUN	SUNGALSES
T1	Test
test	test code
test1	test code
test2	test code 2
TL	Tools
UF	Uniform

Selected

Page 1 of 1 | Remove | Remove All

Group Code	Description
CP	Clips
RT	Rivots
SW	Screws

Click save once complete.

When you generate a report, you can select the reporting group. This will automatically select the underlying group codes without the user having to select each individual group code one at a time.

Inventory Age Analysis

Standard Report:	☒	View As Age Buckets:	☐	FIFO List:	☐	FIFO List Detailed:	☐
Summary Of Movement:	☐	GRV Age Buckets:	☐	FIFO Age Buckets:	☐		
Date From:	2023-09-01			Date To:	2023-09-30		
Warehouse:				Stock Selection:	☒ Quantity ☐ Value		
Stock Code From:				Stock Code To:			
Group Type:	Current Group			Sort By:	Stock Code		
Group Selection:	Fittings			Show Inactive Items:	☐	Decimal Places:	0

Available

Page 1 of 1 Displaying 1 - 36

Description

4SHO

AM - Personal Gain

Below Zero

Bends and Brackets

Beverages

Selected

Page 1 of 1 Displaying 1 - 30

Description

Clips

Rivots

Screws

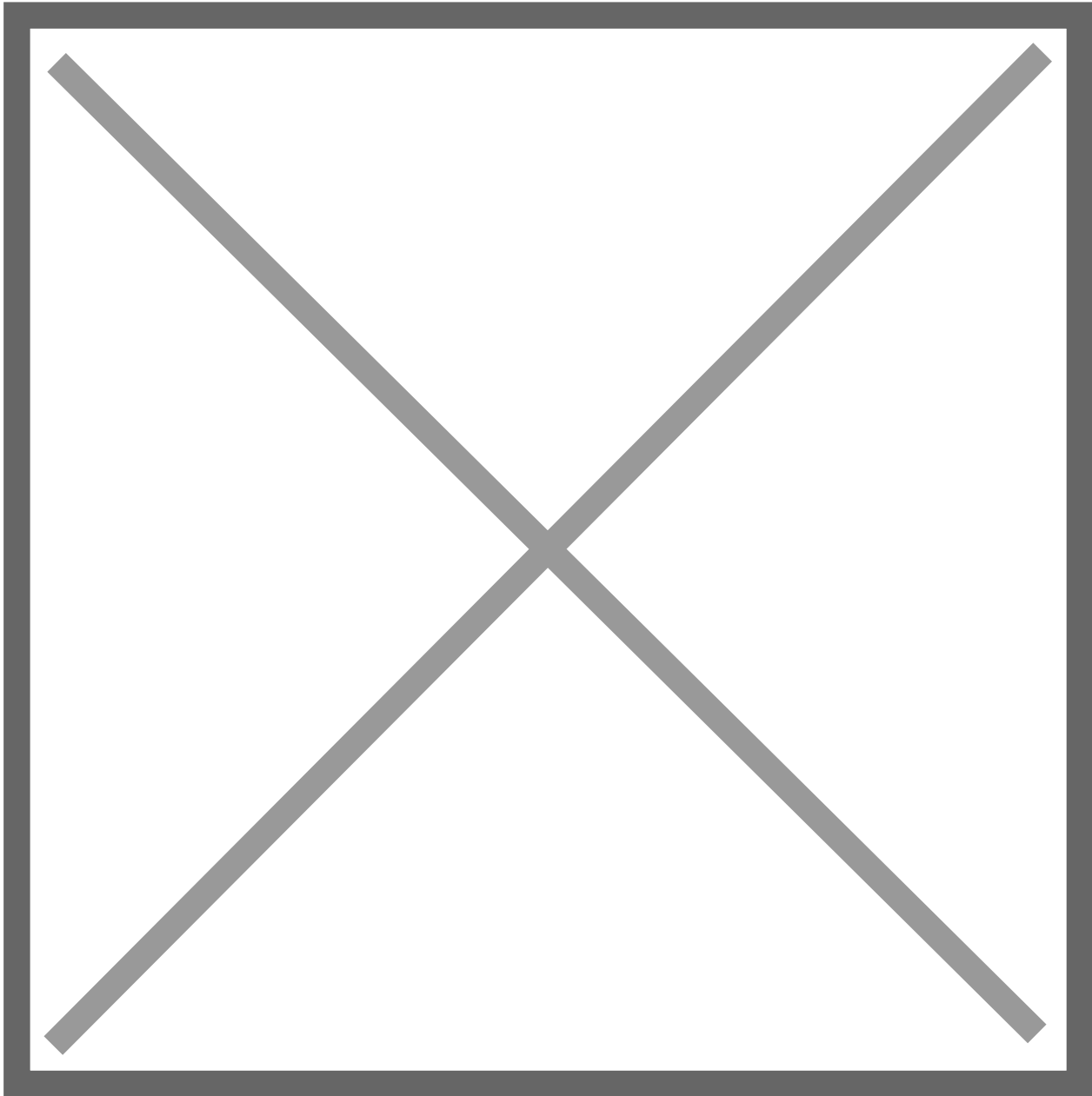
Link Group Code to Inventory Item

Once the groups have been created, you will need to link the inventory Items to the respective group codes.

Inventory Module > Configuration > Inventory Setup

Select and edit the required Inventory Item

Select the required group code from the drop down list



Click Save and Close.

As noted in the group code setup section, this will dictate the relevant sales and cost of sales account posting when this item is processed on an invoice or credit note.

Multiple reports can be generated using the inventory group code as a filter, thereby assisting in sales and inventory analysis.