



Item Class

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Overview

Item Class is a function of the Inventory module of SalesPad Cloud. Item Class is a way to group like items together for visibility and reporting, and a way to make it easier to set up new items by rolling down class defaults. For example, when creating a new item, item valuation method, tax information, and accounts can be defaulted in based on the Item Class selected. Item Classes can also be mapped to a QuickBooks Online [Account Classes](#), which are used on all financial transactions on items within each Item Class, resulting in more detailed reporting options within QuickBooks Online.

Note: We recommend having Track Classes enabled in QuickBooks Online so that SalesPad Cloud can pass along class information for financial/account class reporting in QuickBooks Online.



To get started, select **Item Class** from the Settings menu.



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Item Class

Create an Item Class

To create an Item Class, click the **New Item Class** button in the upper left-hand corner of the screen.



The Create Item Class drawer will appear. Fill out the information fields in this drawer.



For a brief explanation of the different information fields in the Item Class drawer, click here:

Item Class

Item Class - Allows you to assign a name to the Item Class

Account Class - Designates the QBO parent account for the Item Class

Item Type - Indicates whether the Item Class is categorized as Inventory, Non Inventory, Service, or Other Charge

Serial Lot Type - Indicates whether the Item Class is categorized as Serial, Lot, or neither

Taxable - Determines whether or not the Item Class is taxable

Uofm Type - Indicates the default [Unit of Measure](#) for this Item Class (items within a Beverages Item Class might have Liters as the Uofm)

Selling Uofm - Indicates the Unit of Measure this Item Class is sold by (Beverages might be sold by the Pint)

Purch Uofm - Indicates the Unit of Measure this Item Class is purchased by (Beverages might be purchased by the Kiloliter)

Valuation Method - Allows you to choose between a FIFO, LIFO, Average, or Standard valuation method for this Item Class

Income Account - Indicates the QBO account that registers income for this Item Class

Expense Account - Indicates the QBO account that registers expenses for this Item Class

Asset Account - Indicates the asset account associated with this Item Class

Weight Uofm - Indicates the Unit of Measure with which is Item Class is weighed

When you've finished entering your information, click **Save**.

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Edit an Item Class

To edit an existing Item Class, first select the Item Class from the list on the left-hand side of the Item Class Screen.



Once you've selected the Item Class you want to edit, make your changes in the information fields on the right-hand side of the screen.



When you've finished making your changes, click **Save**.

To make an Item Class inactive, check the Inactive box in the upper right-hand corner.

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See it in Action

Item Classes are assigned to [Items](#) in the New or Edit Item drawers.



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