

Knowledgebase > Settings > Item Class

Item Class

Megan De Freitas - 2025-06-10 - Settings

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.

Account and Settings						
Company	Accounting	First month of fiscal year	January			
Billing & Subscription		First month of income tax year	Same as fiscal year			
Sales		Accounting method	Accrual			
Sales		Close the books	Off			
Expenses	Company type	Tax form	Sole proprietor (Form 1040)			
Payments						
Advanced	Chart of accounts	Enable account numbers	Off			
		Discount account	Discounts given			
	Categories	Track classes	On			
		Track locations	On			

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

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Setup		POS	Reports	Other	
Account Class Contact Method Type Customer Class Customer Type Discount Management Fee Type Interaction Type Item Class Location Payment Terms Price Level	Purchase Order Type Reason Codes Sales Document Type Sales Territory Salesperson Shipping Method Tax Codes UofM Type Vendor Class Workflow	Employees Grid Menu Setup Till Counting Till Drawer	Dynamic Grid Reports Grid Reports Import History Inventory Stock Status Report Designer	Integration Dashboard Security System Settings Manage Organization	

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.

Item Class	
New Item Class	
Item Class	

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

Create Item Class

Item Class	
Account Class	
No Account Class	•
Item Type	
No Item Type	•
Serial Lot Type	
No Serial Lot Type	•
Taxable	
Uofm Type	
No Uofm Type	•
Selling Uofm	
No Selling Uofm	•
Purch Uofm	
No Purch Uofm	•
Valuation Method	
No Valuation Method	•
Income Account	
No Income Account	•
Expense Account	
No Expense Account	•
Asset Account	
No Asset Account	•
Weight Uofm	
No Weight Uofm	-

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

Save

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**.

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.

Item Class					
Item Class					
Beverage					
Collateral					
Large Tee					
Medium Tee					
Small Tee					
XL Tee					
XXL Tee					

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.

Item Class Accessories		Account Class Accessories	X ~	Item Type Inventory	× •	Inactive Taxable	
Serial Lot Type Not	×	Uofm Type Each	× •	Selling Uofm Each	× •		
Purch Uofm Each	× *	Valuation Method FIFO	X 🕶	Income Account No Income Account	•		
Cogs Account No Cogs Account	•	Asset Account No Asset Account	•				Save

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.

See it in Action

Item Classes are assigned to Items in the New or Edit Item drawers.

Edit Item	Feedback	×
Item Number		
Accrual - XX Large		
Item Description		
SKU		
ACC0005		
Item Class		
XXL Tee		х 🗸