Item Class

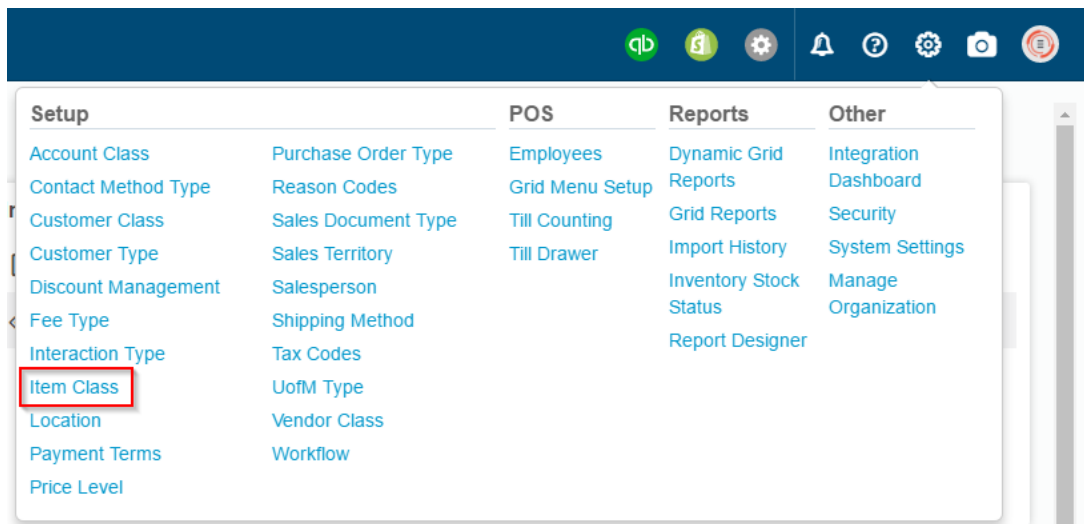Megan De Freitas - 2025-06-10 - Settings

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.
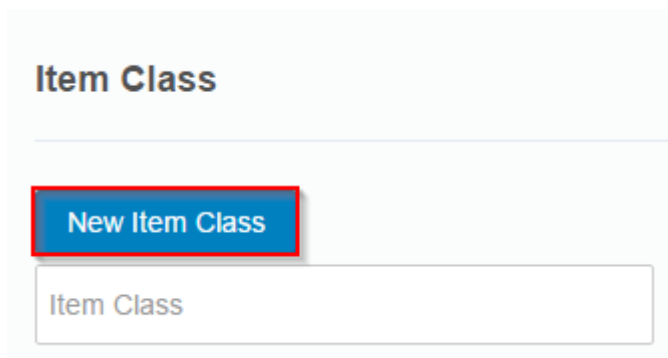

To get started, select **Item Class** from the Settings menu.

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.

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   ▼]

Save

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

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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	Account Class	Item Type	☐ Inactive
Accessories	Accessories	Inventory	☑ Taxable
Serial Lot Type	**Uofm Type**	**Selling Uofm**	
Not	Each	Each	
Purch Uofm	**Valuation Method**	**Income Account**	
Each	FIFO	No Income Account	
Cogs Account	**Asset Account**		
No Cogs 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

✖

Item Number

Accrual - XX Large

Item Description

SKU

ACC0005

Item Class

XXL Tee   ✖ ▼