



Reason Codes (SalesPad Cloud)

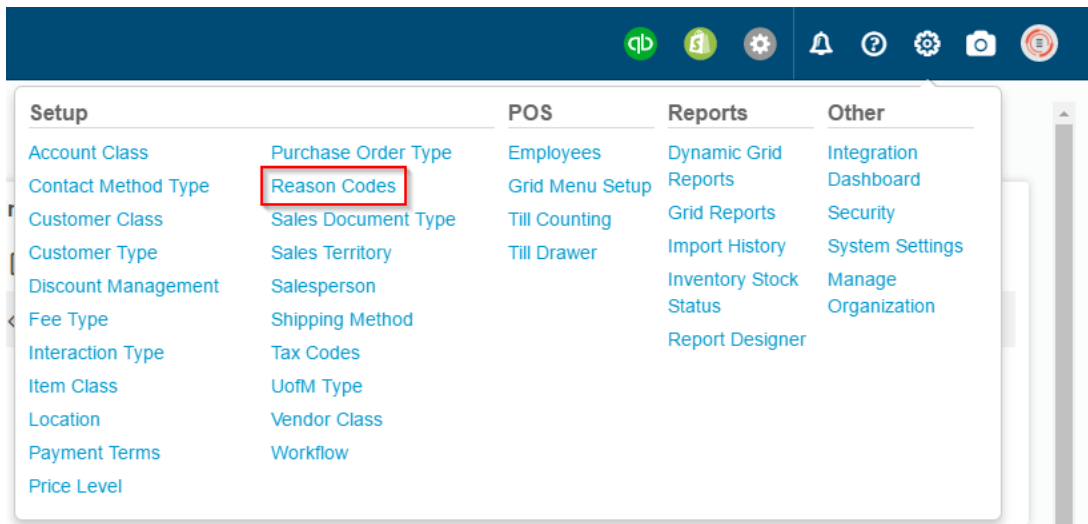
Megan De Freitas - 2024-12-02 - Settings

Overview

Reason Codes are used in both [SalesPad POS](#) and SalesPad Cloud, but their functions are slightly different for both applications. In SalesPad Cloud, Adjustment Codes can be used for inventory transfers, adjustments in, and adjustments out, and Return Codes are used for returns.

Note: Adjustment and Return Codes are the only Reason Codes used in SalesPad Cloud. All other Reason Codes are used in SalesPad POS.

To get started, select **Reason Codes** from the Settings menu.



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Reason Codes

Create a Reason Code

To create a Reason Code, open the tab for the type of Reason Code you wish to create, then click the **New Reason Code** button in the upper left-hand corner of the screen.

Reason Codes

Adjustment Codes Discount Codes Pay In Codes Pay Out Codes Return Codes

New Adjustment Code Please create or select an Adjustment Code

Adjustment Code

For a brief explanation of each Reason Code type, click here:

Reason Codes

New Adjustment Code - Use this code to account for inventory adjustments in or out

New Discount Code - Use this code to give a customer a special discount (not for use with SalesPad Cloud)

New Pay In Code - Use this code to account for money added to a drawer (not for use with SalesPad Cloud)

New Pay Out Code - Use this code to account for money taken from a drawer (not for use with SalesPad Cloud)

New Return Code - Use this code to give a reason for inventory being returned

Depending on which type of Reason Code you select, a corresponding drawer will open. Fill out the information fields in the drawer and click **Save**.

For a brief explanation of the different information fields in each drawer, click on the name of the drawer below:

Adjustment Code

Adjustment Reason - Allows you to name your Reason Code

Description - Allows you to describe your Reason Code

Inventory Account - Indicates the account credited

Offset Account - Indicates the account debited

Inactive - If checked, this Reason Code is inactive

Discount, Pay In, Pay Out, or Return Code

Reason Code - Allows you to name your Reason Code

Inactive - If checked, this Reason Code is inactive

Note: Adjustment Codes can have an Inventory and Offset accounts associated with them, but Return Codes cannot.

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Edit a Reason Code

To edit an existing Reason Code, first select the Reason Code from the list on the left-hand side of the Reason Codes window (make sure that you have the correct Reason Code type tab open)

Reason Codes

Adjustment Codes Discount Codes Pay In Codes Pay Out Codes Return Codes

New Return Code

Return Code

Reason Code

Defective

Defective

Defective Item

Opt Out

Once you've selected the Reason Code you want to edit, make your changes in the information fields on the right-hand side of the screen (available edit fields will vary depending on the type of Reason Code you are editing).

Adjustment Reason Spoilage

Description Used to decrease qty when inventory goes bac

Inventory Account Miscellaneous

Offset Account Accounts Payable

Inactive



Save

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

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See it in Action

Adjustment Codes appear in the [Adjustments](#) module. When creating an adjustment in, adjustment out, or a transfer, assign a Reason Code in the Adjustment Reason column.

IVT0000000099 (Transaction In)  

Description
Restock

Status: Open Date: 8/11/2016


Workflow Batch
Look at Shelf

Line Items Audits Notes

New Line Delete Lines

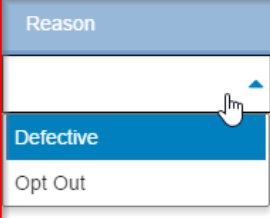
Item Number	Item Description	Inv Transact	UoM	Qty	Adjustment Reason	Unit Cost
Watercolor Pad	watercolor painting sprial-bound ...	In	Each	20.	Inventory Found	7.00

Remember, if you don't see the Adjustment Reason column in your grid, simply click the **Columns** button on the right-hand side of the grid and check the box for Adjustment Reason.

Export **Columns** 

Qty Allocated Qty Fulfilled To Bin

Return Codes are used in the Return Items screen. Assign a Return Code in the Reason column of your Return Items grid.

Qty Returned	Unit Price Override	Return Amount	Reason
1	5.50	5.50	
2	7.00	14.00	
0		0.00	

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