



## Reason Codes (SalesPad Cloud)

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### 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.



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

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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

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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

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**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)



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).



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.



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.



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



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