

Product Groups Overview

The purpose of a Product Group is to arrange inventory into logical categories.

All items are assigned to a Product Group.

These can be used to search for products, streamline purchasing, post transactions to the general ledger, and for analysis of sales and purchasing data.

In this course, we will begin by introducing Product Group Levels.

Then, we will demonstrate adding a new Product Group and the maintenance of existing Product Groups.

Product Group Levels

Product Groups are set up using the System Manager application.

From the navigation pane, select Products.

Choose Product Groups from the list.

Product Groups are assigned levels.

Main categories, like the ones shown here, are level one.

Like a tree, additional groups branch off from the main level.

Clicking the plus icon expands the list to show the groups at the next level.

When there are no plus icons shown alongside a group, you have expanded the list as far as it can go.

Clicking on the minus icon collapses the list one level at a time.

Add a Product Group

To add a new product group, select the level that it will branch from.

You can click on the New button in the toolbar or right-click to open the pop-up menu and select the New option.

A window opens to enter the Product Group details.

The Parent group name is displayed.

Enter the name for the new group. This will be a “child” to the parent group.

If needed, enter a Description for the child group.

The Level number is set automatically in relation to the Parent level.

Optionally, set the appropriate general ledger codes for Sales, Cost and/or Inventory at the appropriate level that will be used for tracking to the general ledger.

It is not necessary to set GL Codes at all levels, only the level that has been identified for general ledger tracking.

When tracking to the general ledger at anything other than level 1, you must have a group that level under all level 1 groups.

For example, if sales will be tracked to the general ledger based on product group level 2, then all level 1 product groups must have at least one level 2 group and all products must be assigned to a level 2 product group or lower.

To complete the entry, click the Add button.

You can continue to add more child Product Groups for the same Parent.

When all have been added, click the Close button.

The new group is added to the end of the list.

Maintain Product Groups

To make changes to Product Group information, start by selecting the group.

From the right-click menu, choose Properties.

The details for the selected group are shown.

Make any needed changes.

When finished, select OK to save your work.

You can also rearrange groups within the existing levels.

From the right-click menu, choose the Edit Tree option.

The window changes to show all the main product groups.

Find the Product Group level that you want to reorder by clicking on the plus icon to expand the list.

Select the group that you want to move.

To move the product group to a new sequence within the existing product group, press and hold the Shift key while you move the Product Group to its new position.

To move a lower level product group from one level 1 group to another, you can just drag and drop from one level 1 group to another level 1 group.

Select Ok after all moves are complete.

Deleting a Product Group is also done from the Product Groups view.

Find the Product Group to remove.

From the toolbar click the Delete icon.

Select Yes to confirm deleting the product group.

You cannot delete a product group that has already been assigned to products.

Product Groups is a Master Table that needs to be setup prior to adding new items.

We have introduced you to Product Group levels and shown you how to add new groups and maintain existing ones.

For further information on assigning and using Product Groups, refer to the Training on Demand Courses “Product Setup” and “Products Overview”.

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