Selecting an Item Group

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Overview

Selecting an Item Group is an essential function for defining your Item Characteristics. The Item Group will define whether the item will be tracked in inventory, and how it will be represented in your accounting books (i.e. Inventory part, service, non-inventory or assembly).

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An Item will be assigned to an individual group. The system will allow the user to create as many Groups as needed. A group will also define other characteristics such as whether quantity is tracked.   The following table documents the types of groups readily available, their corresponding short name, associated accounting and whether the quantities are tracked.

Group Name	Short Name	Accounting Type	Qty Tracked
Parts	PT	Inventory Part	Yes
Service	S	Service	No
Job	JOB	Service	No
Non-inventory Part	NP	Non-inventory Part	No
Other Charge	OC	Other Charge	No
Assembly	A	Inventory Part or Assembly	Yes
Kit	G	Non-inventory Part	No

| Style | NA | See details below. | See details below. |

1. Part - is used for products that you track, buy, sell or use in production but do not assemble.
2. Non-inventory Part - refers to products that you do buy, sell or use in production but do not track.
3. Service - is used for the services you perform for other companies as well as a component in an assembly representing the labor applied to finished goods.
4. Other Charge - is known as miscellaneous things that you charge your customers or pay your vendors.
5. Assembly - is used for products that you track, buy, sell, use in production and assemble.   An assembly will contain a 'bill of materials' which list of components that may be parts, non-inventory, services, other charges and assemblies that comprise the finished good. You will use a work order to build assemblies out of components.
6. Job - refers to 'fixed contract' service in which you do not wish to list specifically all the labor and parts you use.   You will use a work order to complete a job.
7. Kit - is used to sell a group of items together. A kit is different than an assembly in that the Kit itself is not an item whereas the Assembly is an item.   When you ship a kit, you are actually shipping the individual items within the kit where as when you ship an assembly, you DO NOT ship the individual components but rather the assembly. That being said, Order Time allows you to create a configured assembly which you can use to give your customers as options in Order Time.
8. Style - is a grouping of items that have virtually the same characteristics but differ by their attributes (e.g. size or color). It inherits the properties of the item group associated with it. For example, if you make the Style as an Assembly, then it becomes part of inventory and quantity can be tracked. If you make the Style, Non-inventory part, then it takes the properties and accounting type of that item group.