Item Category and Product Group Codes

Owner of this document is: Scott Wiacek – swiacek@feedingamerica.org

Purpose of this document

This document illustrates how to use Item Category and Product Group Codes on Item Cards in Ceres.

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Purpose

Item Category Codes provide default setup information for an item, such as Posting Groups, Costing Method, Handling Fees, etc. Having well defined Codes streamlines the setup of Items. Product Group Codes are tied to an Item Category Code. They provide additional categorization of an item, and the ability to default storage requirements.

*Ceres object release 4.00.00 is required for the functionality documented in this procedure.*

Creating Item Category Codes

1. Item Category Codes can be accessed from Departments → Financial Management → Inventory → Administration → Setup → Item Categories.

2. Click Home → New to create a new Item Category Code.
3. Update the fields as necessary

**Code:** Enter a unique Code to identify the Item Category.

**Description:** Enter text to describe the Item Category Code.

**Def. Gen. Prod. Posting Group:** Select a default General Product Posting Group. When the Item Category Code is assigned to an Item, this field will flow to the Gen. Prod Posting Group field on the Item Card. The Gen. Product Posting Group provides the Income Statement Account setup that will be used to post dollar transactions to the General Ledger.

**Def. Inventory Posting Group:** Select a default Inventory Posting Group. When the Item Category Code is assigned to an Item, this field will flow to the Inventory Posting Group field on the Item Card. The Inventory Posting Group provides the Balance Sheet Account setup that will be used to post dollar transactions to the General Ledger.

**Def. Costing Method:** Select a default Costing Method. When the Item Category Code is assigned to an Item, this field will flow to the Costing Method field on the Item Card. Generally, FIFO is selected as the costing method for purchased product, and Standard for product that is donated.

**Def. Lot Nos:** Select a default Lot No Series. When the Item Category Code is assigned to an Item, this field will flow to the Lot Nos. field on the Item Card.

**Def. Handling Fee (per Lb):** Input a default handling fee per pound. When the Item Category Code is assigned to an Item, this field will flow to the Handling Fee (per Lb) field on the Item Card. The Handling Fee (per Lb) field is used in the calculation of the Unit Fee.
Def. VAP Fee (per Lb): Input a default VAP fee per pound. When the Item Category Code is assigned to an Item, this field will flow to the VAP Fee (per Lb) field on the Item Card. The VAP Fee (per Lb) field is used in the calculation of the Unit Fee.

Def. Cost Adjustment Type: Select a default Cost Adjust Type. The options are Amount or Percent. When the Item Category Code is assigned to an Item, this field will flow to the Cost Adjustment Type field on the Item Card. The Cost Adjustment Type field is used in the calculation of the Unit Fee.

Def. Cost Adjustment Factor: Input a cost adjustment factor. When the Item Category Code is assigned to an Item, this field will flow to the Cost Adjustment Factor field on the Item Card. The Cost Adjustment Factor field is used in the calculation of the Unit Fee.

Creating Product Group Codes

1. Product Group Codes can be accessed from Departments → Warehouse → Administration → Setup → Inventory → Product Groups.

2. You can also access Product Groups by navigating to the Item Category Codes, selecting the desired Item Category, and then clicking Home → Prod. Groups. This filters the Product Group list by the selected Item Category Code, which can be helpful.
3. Click Home → New to create a new Product Group.

4. Product Groups are associated to an Item Category Code. If it is not already specified, select an Item Category Code. The click on Home → Prod. Groups.

5. From the Product Groups Page, fill in the fields as necessary.

Code: Enter a unique Code to identify the Product Group.

Item Category Code: Select an Item Category Code to link the Product Group to a specific Item Category.

Description: Enter text to describe the Product Group.

Bin Class Code: Select a Bin Class Code. When the Product Group Code is specified on an Item Card, the Bin Class Code assists in providing storage requirements.

Warehouse Class Code: When the Product Group Code is specified on an Item Card, the Warehouse Class Code assists in providing storage requirements.

Related Topics:
1. Item Overview
2. Inventory Picks