Item Category

Module Guide: Item/Service Category

Module Location

Inventory > Item/Service > Item Category

Module Objective

The **Item/Service Category** module serves as the master data hub for creating and managing the hierarchical structure of all item categories and sub-categories. The categorization created here will be used to classify each item in the **Item/Service List** module, which is crucial for simplifying searching, filtering, and reporting processes.

1. Main View (Category Structure)

The main page of this module displays a **tree view** of all the categories and sub-categories that you have defined.

View Explanation

This page is for viewing and managing the category hierarchy.

- **Item/Service Category Type Filter**: Use this dropdown to switch between the main category types, such as **RAW MATERIAL** (in the example), **FINISHED GOODS, PACKAGING MATERIALS,** etc.

- **Add Group**: Use the **>> Add Group <<** link to create a new category or sub-category.

2. Steps to Create a New Category

Step 1: Start Category Creation

1. From the Main View, select the appropriate **Category Type** (e.g., RAW MATERIAL).
2. Click the **>> Add Group <<** link to open the **Add Group** form.

Step 2: Fill in Category Details

On the form that appears, fill in the required details:

- **Category Name**: Enter a new and specific category name (e.g., 'Flour', 'Sugar', 'Oil', 'Carton Box').
- You can also fill in other data such as **Usage Life** or **Procurement Lead Time** if relevant for that category.

Step 3: Save the Category

After all data is filled in, click the **[Save]** button to add the new category to the structure.

Workflow & Integrated Business Process

- This module is a preparatory step before you create a new item in the **Item/Service List** module.
- The categories you create here will appear as the options in the **'Category'** dropdown when you register a new item.

Tips & Important Notes

- A logical and well-organized category structure will greatly simplify inventory searching and reporting in the future.
- You can create multiple levels of sub-categories for more detailed classification (for example, Raw Material -> Food Chemicals -> Food Flavoring).

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