



How to Create, Edit and Delete a Stock Category

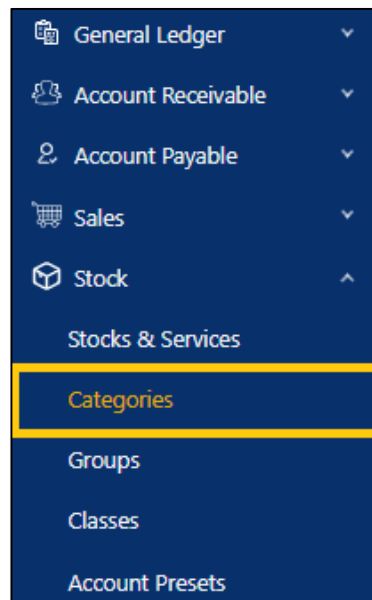
Overview:

Categories is a form that enables the user to maintain a type categories or group aside from the Stock Group and Class that each of your stock items belongs to. This function can be used to generate reports related to inventory.

Procedure:

How to Create Stock Category

1. In Navigation pane, go to Stock > Categories

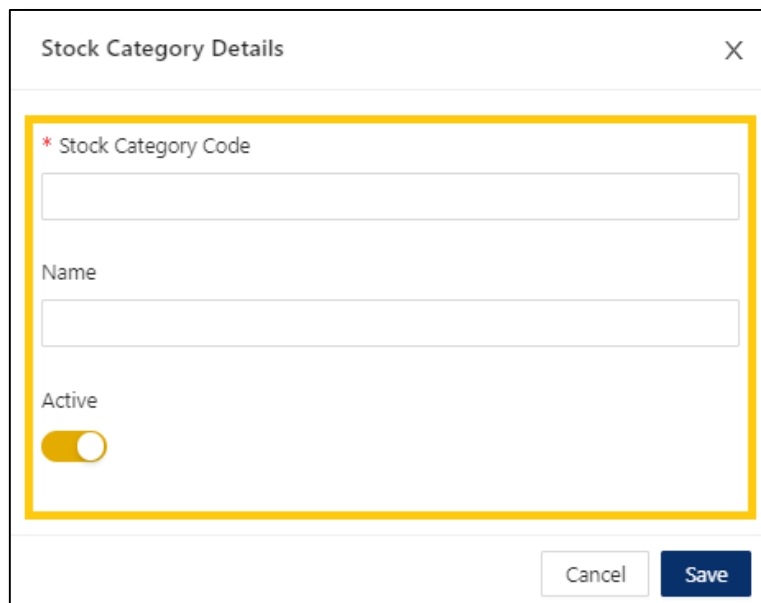


2. In Stock Category , click **Add**

Stock Categories			
			<input type="button" value="Add"/> <input type="button" value="Delete"/> <input type="button" value="Reload"/>
<input type="checkbox"/>	Code	Name	Active
<input type="checkbox"/>	AV	ANTI-VIRUS PROGRAM	Inactive
<input type="checkbox"/>	CDR	CD RECORDABLE	Active
<input type="checkbox"/>	CD-ROM	CD ROM	Active
<input type="checkbox"/>	CPU	CENTRAL PROCESSING UNIT	Active
<input type="checkbox"/>	DISK	COMPUTER DISKETTES	Active

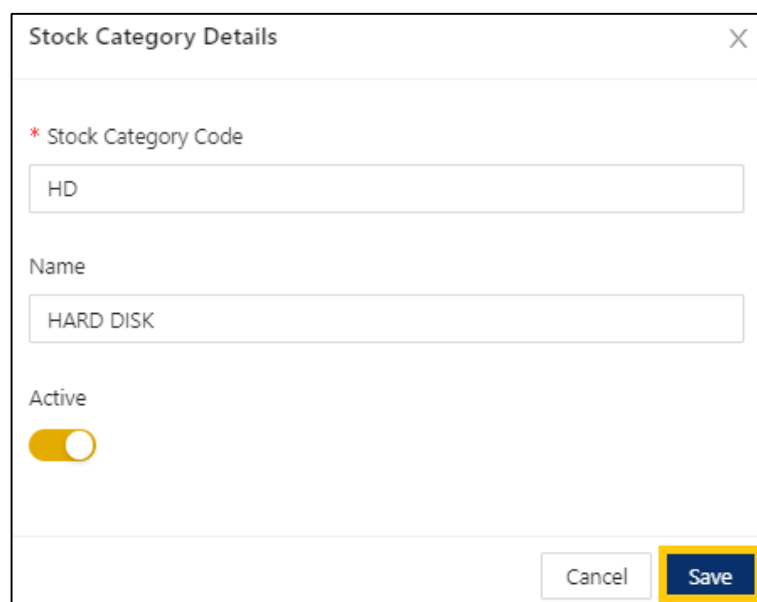
3. Supply the fields with data;

- **Stock Category Code:** This is a compulsory field with maximum of 20 alphanumeric length
- **Name:** This is a compulsory field which you need to indicate the name of the Stock Category
- **Active:** This is a function to set if an Area is still used. If an Area will not be used anymore, disable the toggle to make as Inactive.



The screenshot shows a modal window titled "Stock Category Details" with a close button (X) in the top right corner. The form contains three fields: "Stock Category Code" (marked with a red asterisk), "Name", and "Active". The "Active" field is a toggle switch currently in the "On" position. The "Stock Category Code" field is highlighted with a yellow border. At the bottom right, there are "Cancel" and "Save" buttons.

4. Once done, click **Save**



The screenshot shows the same "Stock Category Details" modal window, but now with data entered. The "Stock Category Code" field contains "HD", the "Name" field contains "HARD DISK", and the "Active" toggle switch is still in the "On" position. The "Save" button at the bottom right is highlighted with a yellow border.

How to Edit Stock Category

1. In Stock Category List View, click **Code** to open.

Stock Categories			
		Add	Delete Reload
<input type="checkbox"/>	Code	Name	Active
<input type="checkbox"/>	AV	ANTI-VIRUS PROGRAM	Inactive
<input type="checkbox"/>	CDR	CD RECORDABLE	Active
<input type="checkbox"/>	CD-ROM	CD ROM	Active
<input type="checkbox"/>	CPU	CENTRAL PROCESSING UNIT	Active
<input type="checkbox"/>	DISK	COMPUTER DISKETTES	Active
<input type="checkbox"/>	HD	HARD DISK	Active

2. Apply necessary change. Once done, click **Save**

Stock Category Details

X

* Stock Category Code

HD

Name

HARD DISKS

Active

☒

Cancel

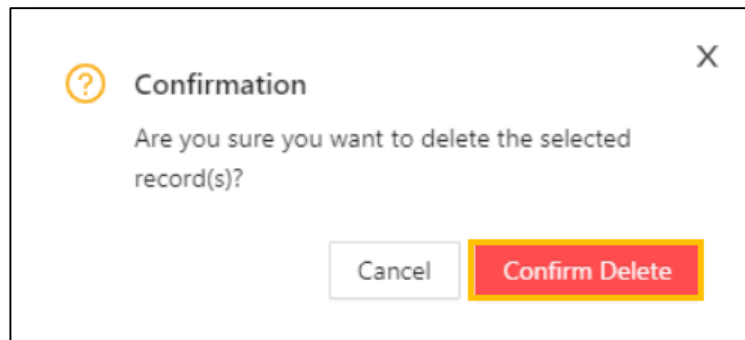
Save

How to Delete Terms

1. In Stock Category List View, click **Delete** on the code

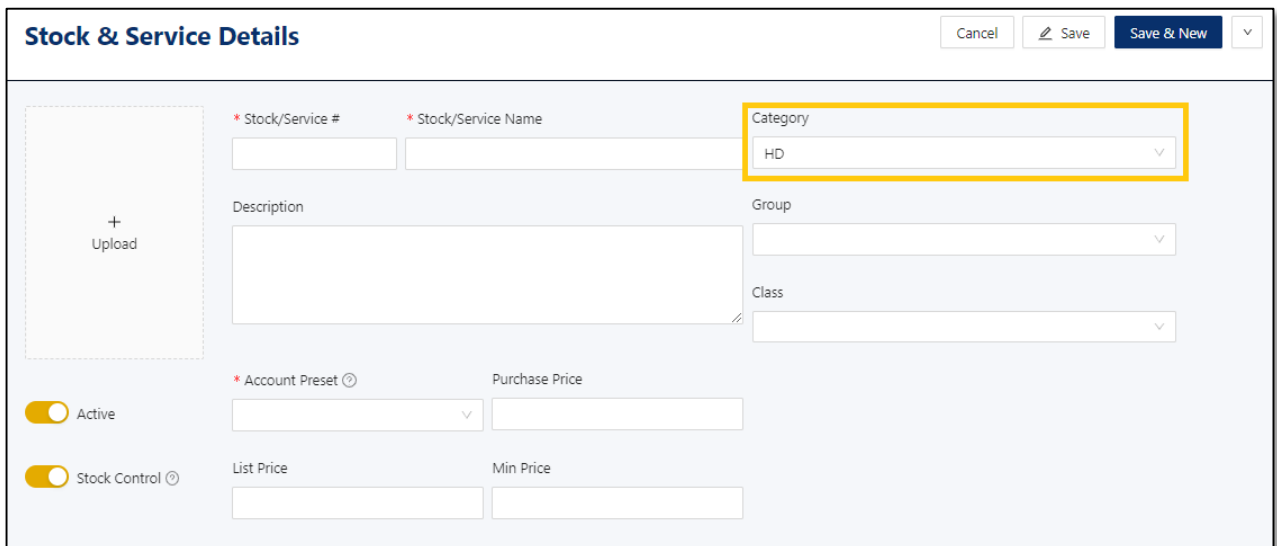
Stock Categories			
		Add	Delete Reload
<input checked="" type="checkbox"/>	Code	Name	Active
<input checked="" type="checkbox"/>	AV	ANTI-VIRUS PROGRAM	Inactive
<input type="checkbox"/>	CDR	CD RECORDABLE	Active
<input type="checkbox"/>	CD-ROM	CD ROM	Active
<input type="checkbox"/>	CPU	CENTRAL PROCESSING UNIT	Active
<input type="checkbox"/>	DISK	COMPUTER DISKETTES	Active

2. When the confirmation message prompted, click **Confirm Delete**



Application:

Category is now available for selection in Stock & Service Details

A screenshot of the "Stock & Service Details" form. The form has a header with "Stock & Service Details" and buttons for "Cancel", "Save", "Save & New", and a dropdown arrow. The form fields include: "Stock/Service #" and "Stock/Service Name" (text inputs), "Category" (a dropdown menu with "HD" selected, highlighted by a yellow box), "Description" (a large text area), "Group" (a dropdown menu), "Class" (a dropdown menu), "Active" (a toggle switch), "Stock Control" (a toggle switch), "Account Preset" (a dropdown menu), "Purchase Price" (a text input), "List Price" (a text input), and "Min Price" (a text input). There is also an "Upload" button with a plus icon.

For further concerns regarding this matter, please contact support to assist you or create ticket thru this link <https://support.qne.com.ph>