

## Item Grouping

Item Grouping enhancement developed by Information Integration Group, Inc. (IIG) allows for grouping and streamlined loading of grouped items into Sales Order Transactions. Items are grouped as Customer Frequently buy and Sold as Groups. Enhancement allows for auto loading of grouped items or user-based selection of stock and non-stock items to load.

### SPECIFY GROUPED ITEMS IN STOCK ITEM FORM

- **Group Items in Stock and Non-Stock Item forms.** The added Item Groups tab to the Stock and Non-stock item forms allows for grouping of items.

### LOAD PRICING, UNIT OF MEASURE AND QUANTITY

- **Grouping Type by Item.** Select for Stock and Non-Stock item the grouping type of Customers Frequently Buy or Grouped when sold.
- **Enter Loading Parameters.** Enter Unit of Measure, Quantity, Unit Price (or Free Item) setting for each Stock and Non-stock item grouped.

### SELECT ITEMS ADDITION TO SALES ORDER FORM

- **Select Items Grouping Option.** Added option to Sales Order form allows for viewing grouped items.
- **Pop-Up or Secondary Grid.** Display grouped items as a pop-up or in the added secondary grid.

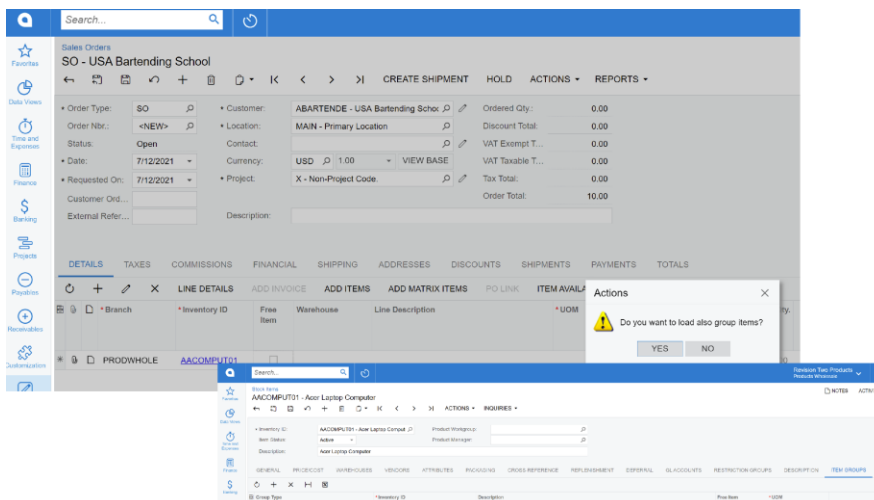
### KEY BENEFITS

#### STREAMLINE TRACKING OF CORE RETURN REQUIREMENT

- Flag items requiring a core return.
- Auto generate a core return SO transaction from sales and service order entry forms.

#### AUTO GENERATE INVOICES

- Auto generate invoices for core products not returned.



## ITEM GROUPING FEATURES AND CAPABILITIES

### Enter Grouped Stock and Non-Stock Items

Enter grouped items in Stock and Non-stock forms using the added Item Groups tab.

### Specify Grouping Type

Flag grouped items as Customer Frequently Buy or Grouped when sold types.

### Specify Item Loading Details

Enter Unit of Measure, Quantity, Unit Price (or Free Item) setting for each Stock and Non-stock item grouped.

### Streamlined Processing of Grouped Items

An added option to Sales Order form allows for user prompt or auto-loading of grouped items.

### Streamlined Deleting of Grouped Items

Option for auto-deleting or user prompt based deletion of group items from the sales order.

## THE ACUMATICA ERP DIFFERENCE

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### STREAMLINE OPERATIONS

**Manage your business more efficiently:**

- Automate processes
- Control workflows
- Access the system from anywhere on any device – including mobile
- Promote collaboration with all-inclusive user licensing

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**Add and extend:**

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- Easily configure your solution to fit your needs
- Add capabilities such as CRM or data visualization at any time
- Extend to other solutions and applications beyond ERP

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