

Customer Group Saleable Items

This screen lets you list items that are saleable to customers belonging to a particular customer group. This means that items not listed for a customer group cannot be sold to customers belonging to that customer group. The item lookup on *Line Items* tab on the *Sales Order Entry or Quotation* window can be limited to only those items that are saleable to that customer by setting the value of the *Pick Item Lookup on Sales Order From* field on the *Sales Setup* screen to *Customer Group Saleable Items*.

Go To: Sales → Sales Master Data → Customer Group Saleable Items.

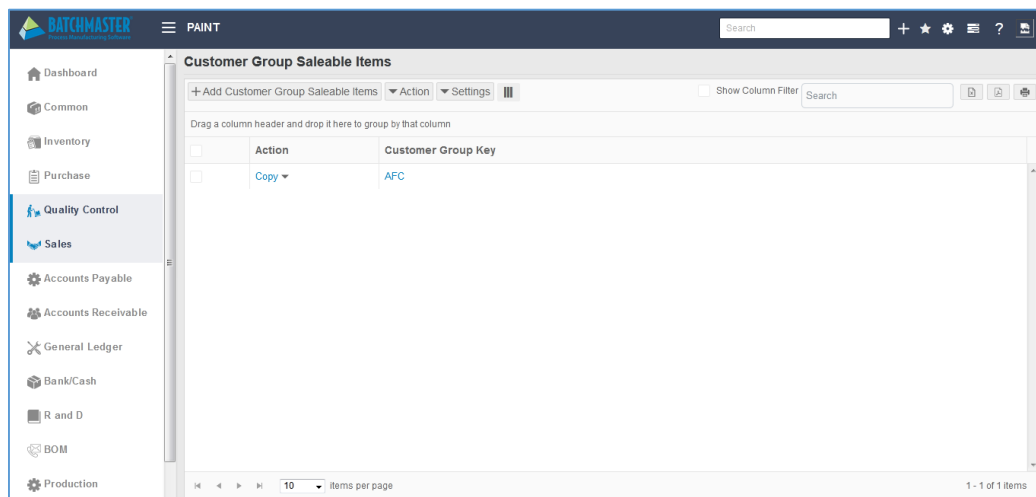


Prerequisite: Data should be set up at the following screens before creating a customer group saleable item:

- *Customer Group Master*.
- *Item Master*.

Customer Group Saleable Items – Dashboard

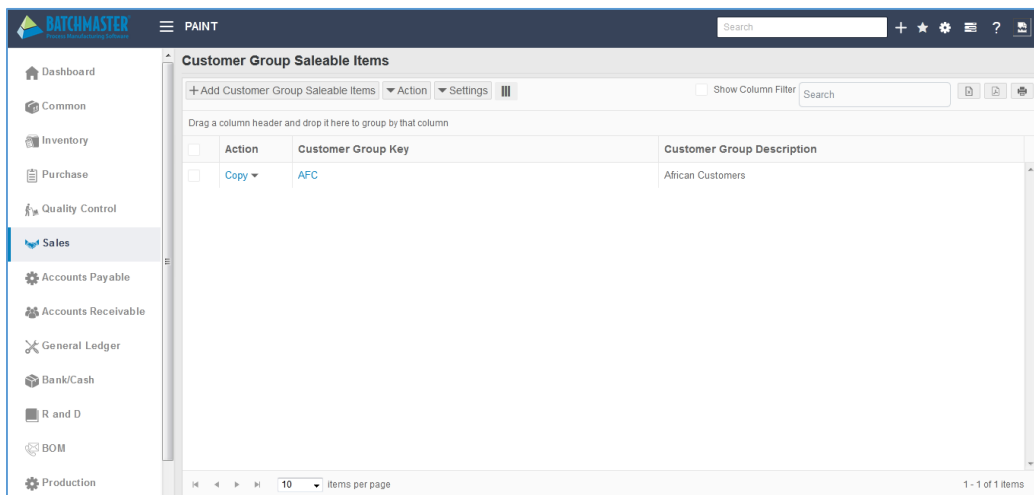
You can manage Customer Group Saleable Items from this dashboard. By default, the system displays all the existing Customer Group Saleable Items as maintained for your business/company. You can click on any of the Customer Group Saleable item record to view its details.



The *Customer Group Saleable Items* dashboard contains many elements that occupy 100% of the browser window. Resizing the window would resize the elements to fit. The elements can be

rearranged, i.e., docked, resized, grouped, and stacked. The header and the side panel can't be rearranged.

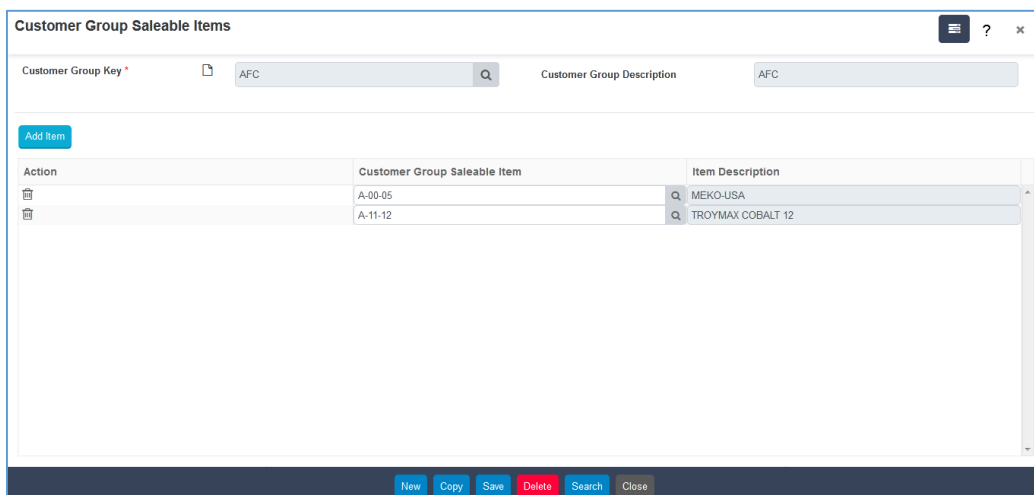
After you select all the columns of the *Customer Group Saleable Items* dashboard, the middle grid displays the selected columns.



The *Customer Group Saleable Items* dashboard provides a clear vision of the created records in a read-only mode. You can view the created Customer Group Saleable Item records as per the number of pages provided per page.

Customer Group Saleable Items Screen – Add Mode

To add a new Customer Group Saleable Item Information to your BatchMaster database, click on the + *Add Customer Group Saleable Items* button. The system displays the *Customer Group Saleable Item Details* screen, where you can create a new record.



Customer Group Saleable Items Fields:

Customer Group Key: This is the unique identification key of the customer group associated with the saleable items. This is a mandatory field.

Customer Group Description: This is the description of Customer Group Key.

Customer Group Saleable Item(s) Grid:

Customer Group Saleable Item: This is a unique identification key of an item being saleable to the selected customer group. This is a mandatory field.

Item Description: This is the description for the selected item. While creating a new Customer Group Saleable Item, this field gets defaulted with the description from the item master. This field is not modifiable.

Add Item: Clicking this button inserts a line into the grid. Once user click on the *Add Item* button, the *Item Master Lookup* window appears. On the *Item Master Lookup* window user can select multiple items. Clicking the *Ok* button would insert the selected items on the grid.

Creating a Customer Group Saleable Items Record

1. Open the *Customer Group Saleable Items* dashboard.
2. Click on the *+Add Customer Group Saleable Items* button to open a new blank record.

The screenshot displays the 'Customer Group Saleable Items' dashboard. At the top, there is a header bar with a menu icon, a question mark, and a close button. Below the header, there are two input fields: 'Customer Group Key' with a red asterisk and a search icon, and 'Customer Group Description'. A blue 'Add Item' button is positioned below these fields. The main area contains a table with three columns: 'Action', 'Customer Group Saleable Item', and 'Item Description'. The table is currently empty, showing 'No records yet created.' At the bottom of the dashboard, there is a dark blue bar with several buttons: 'New', 'Copy', 'Save', 'Delete', 'Search', and 'Close'.

3. Specify the *Customer Group Key* using the lookup next to the field.
4. Click on the *Add Item* button to open the *Item Master Lookup* window. Select the required items.

Item Master Lookup

Search ☐ Show Column Filter

Drag a column header and drop it here to group by that column

<input type="checkbox"/>	Item Key	Desc1	Itemtyp	Description
<input checked="" type="checkbox"/>	A-00-05	MEKO-USA	RM	Raw Material
<input checked="" type="checkbox"/>	A-11-12	TROYMAX COBALT 12	RM	Raw Material
<input type="checkbox"/>	A-12-19	TROYMAX CALCIUM 10NA	RM	Raw Material
<input type="checkbox"/>	A-13-12	TROYMAX ZIRCONIUM 24	RM	Raw Material
<input type="checkbox"/>	A-30-22	VISCOGELED	RM	Raw Material
<input type="checkbox"/>	A-40-34	LIOSEPERSE657	RM	Raw Material
<input type="checkbox"/>	B-02-19	ZENKYD 1057K70	RM	Raw Material
<input type="checkbox"/>	B9604EI-DV400	CHEMPART SC100 EMULSION INTERMEDJAE	RM	Raw Material
<input type="checkbox"/>	BLACK	Black granuales	POL	Polymer
<input type="checkbox"/>	C101-RED-TEST		POL	Polymer

10 items per page 1 - 10 of 64 items

OK **Cancel**

5. The selected items are defaulted in the grid field.

Customer Group Saleable Items

Customer Group Key AFC Customer Group Description AFC

Add Item

Action	Customer Group Saleable Item	Item Description
<input type="checkbox"/>	A-00-05	MEKO-USA
<input type="checkbox"/>	A-11-12	TROYMAX COBALT 12

New **Copy** **Save** **Delete** **Search** **Close**

6. Click on the save button to save the record.