

## Does Class Matter?

Customer, vendor, and item classes are often underutilized features in Dynamics GP (Great Plains). During initial setup of new master records (cards), classes can be used to default setup information that is common among a group of master records. If a class of customers, vendors or items will continue to use the same common setups in the future, the class can be used to push changes to the cards that are assigned to that class. Classes can also be used for reporting purposes and for various utilities.

During creation of a new customer, vendor or item card, various setups can default to the card by selecting a particular class. This can make setup easier and ensure that important fields have, at a minimum, a default value. For instance, if your company initially offers a minimum or an unlimited credit limit to your customers, this credit limit can default from the class to ensure that the customers are not initially set up with the GP defaulting value of “No Credit”. In the vendor class, a Tax Type of “Miscellaneous” can default for classes used for consultants or outside services, thus flagging them as 1099 vendors and ensuring that payments to those vendors are captured from the beginning. Payment Terms and maximum Write Off amounts are commonly used features available on both the Vendor and Customer Class setups.

Item Type, Valuation Method, and Quantity and Currency Decimals can default from the Item Class to be sure that the proper options are selected during the creation of a new item. These values cannot be changed after the item is saved so it is important to select the appropriate option from the start. Unit of Measure, Price Groups, Price Levels, tax options and User-defined Categories are among the other options available to default from the Item Class.

Distribution Account defaults can be set up by class. This feature is frequently used on the Item Class where Inventory, Sales, Cost of Goods Sold, etc. accounts vary for different classes of items or on the Customer Class when groups of customers are assigned to different Sales, Cost of Goods Sold, etc. accounts. If groups of vendors or customers use different Accounts Receivable (AR) or Accounts Payable (AP) control accounts, they can default from the class to reduce data entry errors. If a company only uses one control account, the company-wide default can be set up in the Posting Accounts setup and then the accounts that vary by groups can default to the cards from the class.

Only options generally common to the assigned master records should be selected on the Class Setups and all other fields can be left blank. For most companies, Maintain History check boxes should normally be selected on all class setups.

During the setup of a new Customer, Vendor, or Item card, the default values from the selected class will populate the appropriate fields. The default values can be overridden manually for the options that are specific to that customer, vendor, or item. During transaction entry, GP only pulls defaulting values from the card – never from the class.

If all of the master records that have been assigned to a class always use the same options, changes to all assigned records can be made from the class and “pushed” to assigned cards. This feature can only be used if options are never overridden on individual cards because all defaulting values from the class – including blanks – will be pushed to the assigned cards.

Many GP standard reports, inquiries and utilities allow users to select customers, vendors, or items by class. AR and AP aging reports can be run by class or a range of classes. If a company uses multiple AR or AP GL control accounts, it is possible to use the class assignments to create aging reports to help reconcile the subsidiary ledgers to those accounts. Vendor classes can be used during check selection which is particularly valuable if, for instance, you want to pay your employees or some other group of vendors in a separate check run. Also, several utilities allow the user to select records by class or range of classes – notably, items can be assigned to sites by class range and stock counts can be created by class range. If you want to be able to select ranges of classes, it is important to create a Class ID naming scheme that will allow you to select a range of similar classes while excluding others.

By using classes wisely, your company can ensure that important fields are populated, reduce data entry errors during master record creation, and improve your reporting options.

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