

How to convert account group to stock group

1. Create account group as required.
2. Open required accounts group.
3. Make sure all accounts have been converted to O accounts, if not please click Convert I account into O Accounts.
4. Click Show Group Stock Totals – this will show all products purchased for these groups back to 2001.
5. Click the year in which you would like to go back to. For example, if you would like to have all products which have been purchased from 2015 onwards, click 2015. This will shorten the list to the relevant products only.
6. Once happy with products showing, click generate stock group. The screen will tell you which stock group has been created.
7. Go back to the Stock/Accounts Group Menu and select the relevant stock group.

* NOTE, when Converting from I account to O account, opera has many instances where one I account has multiple O Accounts, where possible system will try to match the correct O to the correct I it will not be 100% perfect automatching.