

Customized Product Accounting

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You sell products in your market to make income, and classifying that income in the right accounting categories is obviously important! When you create market orders, you'll likely want to create a connected income transaction in the accounting section of Farmbrite to track the funds you bring in. Farmbrite will automatically associate this income with a default accounting category for your [Profit and Loss Statement](#) and [Tax Summary](#) reports, but you also have the opportunity to customize the category used for a specific product if you need. This will [split the transaction](#) and associate each item in the order with the category it's mapped to.

Note: The standard accounting category used for your market order income is Sales of livestock, produce, grains, and other products you raised. If you do not enable the optional feature in this article, market order income (excluding taxes charged) will be added to that category by default when creating accounting income transactions from market order payments. You can override this on an individual order basis if needed.

Customizing Accounting Categories

While not absolutely required for this feature, if you want to set default accounting categories for your products, you likely want to [review your current accounting categories and create any new ones](#) you'll need for your products as a first step. You can find this under the Settings menu. In the example below we have created additional categories for Hot Sauce Sales, Bison sales, and Shipping and Delivery. They are connected to the same parent category and tax line, but will be split into their own line on our Profit and Loss Statement.

The screenshot displays the Farmbrite dashboard interface. On the left is a navigation sidebar with categories like Schedule, Tasks, Livestock, Plantings, Resources, Accounting, Market, Contacts, Farm Map, Climate, and Reports. The main content area is divided into several sections: 1. Weather for Golden: Shows a current temperature of 85°F, a red 'AIR QUALITY ALERT' from NWS Denver CO, and a forecast for the next 6 hours (12PM to 5PM) with temperatures ranging from 85°F to 88°F. 2. Top Upcoming Tasks: A list of five tasks with due dates, including 'Till field and beds' (due May 28, 2024) and 'Fertilize with NitroBoost 4-0-5' (due Jun 05, 2024). 3. Recent Orders: A bar chart showing order activity for May 2024. 4. Income vs Expense: A small bar chart showing financial trends.

Configuration and Setup

To enable the split feature, navigate to Market>Online Store, and check the box to Split Order Transactions by Product. Be sure to save after making that selection.

The screenshot shows the Farmbrite dashboard. On the left is a navigation menu with options like Schedule, Tasks, Livestock, Plantings, Resources, Accounting, Market, Contacts, Farm Map, Climate, and Reports. The main content area is titled 'WEATHER FOR GOLDEN' and features an 'AIR QUALITY ALERT' from NWS Denver CO. The current temperature is 85°F. Below the weather is a 'TOP UPCOMING TASKS' section with a list of tasks such as 'Till field and beds', 'Branding and Tagging Livestock', and 'Fertilize with NitroBoost 4-0-15'. To the right, there are charts for 'RECENT ORDERS' and 'INCOME VS EXPENSE'.

Now that the feature is enabled, you'll see a new option in your product configuration to choose a specific category to associate it with. In our example below we have associated one of our hot sauce products with the hot sauce category. Going forward, anytime we sell this product in an order, it's income will be associated with that category instead of the default.

The screenshot shows the 'Online Store' settings page in Farmbrite. The 'Settings' tab is active. The 'Online Store' toggle is turned 'ON'. The 'Custom Shop URL' is set to 'https://test.farmbrite.com/store/'. Under 'Payment Options', several checkboxes are checked, including 'Accept Online Payments', 'Accept Cash', 'Accept Check', 'Split Order Transactions by Product', 'Auto-calculate Taxes', and 'Enable QuickPay'. Under 'Customer Options', 'Require phone number at checkout' and 'Offer Promotional Codes' are checked. The 'Shipping & Delivery Fee (Optional)' is set to '\$ 5.0' and the 'Delivery Fee Accounting Category' is set to 'Shipping and Delivery'. The 'Starting Order Number' is 1104, and 'Email new Orders to' is 'chris+masella@farmbrite.com'. 'Cancel' and 'Save' buttons are at the bottom right.

You can optionally select a custom category on any of your products. Be aware that any product without a category selected will be assigned to the default *Sales of livestock, produce, grains, and other products you raised* category. You don't have to make this selection on all of your products, just the ones you want to classify differently from the default.

You can also decide how to categorize your Shipping and Delivery fee as well. This is found under the Online Store settings. If you do not change this, the shipping fee will be associated with the default category as well.

Online Store

Settings About Your Farm Look & Feel

ON

Custom Shop URL

Open - Online shop is active and open
 Closed - Online shop is closed

Payment Options

- Accept Online Payments Connected and ready to use
- Accept Cash
- Accept Check
- Split Order Transactions by Product
- Auto-calculate Taxes Automatic taxes setup and ready to use
- Enable QuickPay

Customer Options

- Require email at checkout
- Require phone number at checkout
- Offer Promotional Codes

Shipping & Delivery Fee (Optional)

Delivery Fee Accounting Category

Starting Order Number

Email new Orders to

Cancel

Splitting Market Transactions

Now that you've configured your categories, enabled the setting, and connected the categories to your products, let's take a look at how this is applied when creating orders.

When you create a new order manually, you'll add the products ordered and then apply any shipping fees. If you've received payment, you'll mark it as paid and optionally check the box to "Record net income (minus taxes) in accounting section (If marked as Paid)". If you do, you can then select a default category to use for the accounting transaction. This selection will be used to split and categorize any products that do not have a category selected in their setup. It does not override the category you selected for an individual product, it fills in the gaps for any product that does not have one selected.

After saving, the accounting transaction is created, with the products assigned to the correct category from their setup, and products without a category assigned to the default. In the example below, note that the hot sauce and ground bison are categorized in their selected categories, while the 5 Alarm chili is assigned the default as it did not have a category selected in the product setup.

Orders/Invoices

Create New

Search

Criteria: Order Status: Multiple Filter

#	Amount	Status	Customer	Date
2766	\$66.14	Ordered Paid Delivery	Kenny Kenstford chris+kenny711@farmbrite.com	Jul. 11, 2024
2765	\$25.00	Ordered Paid	chris+joe711@farmbrite.com	Jul. 11, 2024
2764	\$27.74	Packing Paid Pick up	Kev Keveer chris+kev711@farmbrite.com	Jul. 11, 2024
2763	\$94.99	Ordered Paid Shipped	Tommy Thomas chris+tommy711@farmbrite.com	Jul. 11, 2024
2762	\$15.85	Ordered Paid Shipped	Greg Gregburg chris+greg711@farmbrite.com	Jul. 11, 2024
2761	\$13.67	Ordered Paid Shipped	Frank Frankton chris+frank711@farmbrite.com	Jul. 11, 2024
2760	\$12.95	Ordered Paid Delivery	Frank Frankton chris+frank711@farmbrite.com	Jul. 11, 2024
2759	\$15.85	Ordered Paid	Ralph Cifaretto chris+ralph@farmbrite.com	Jul. 11, 2024
2758	\$8.75	Ordered Paid	Ralph Cifaretto chris+ralph@farmbrite.com	Jul. 11, 2024
2757	\$7.95	Completed Paid	Marj Cettington chris+marj@farmbrite.com	Jul. 11, 2024
2756	\$7.95	Completed Paid	Marj Cettington chris+marj@farmbrite.com	Jul. 11, 2024
2755	\$14.45	Completed Paid	Eric Cartman chris+eric@farmbrite.com	Jul. 10, 2024

The process is very similar for orders that are received through your online shop.

- If paid via credit card, the accounting transaction will automatically be created when the order is processed. The same rules apply; if the product/shipping fee has a category selected it will be used, and if it doesn't, the default will be assigned.
- If your customer selected to pay via check or cash on pickup, you'll follow the same steps outlined above to update the order and record the transaction.

Be aware that regardless of the automatic split that was created, if you ever want to move a product into a different category, you can navigate to the transaction itself and update the assignment.

[Let us know if you have any additional questions](#) as you configure and use this feature!
