Create a New Item Category

2016 - Summer Edition

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Overview

An Item Category is a fundamental component of the Office system. A Category represents a collection of Items, and is a subset of a Group. An Item can only belong to one Category and one Group. An unlimited number of Items may exist in a Category, and an unlimited number of Categories may exist in a Group.

An Item Category fits into one of (3) areas: (1) Food and Beverage, (2) Retail, or (3) Billing. Item Categories have a Child Relationship to Groups, and a Parent Relationship to Items. Therefore, a Group must first exist before an Item Category can become a Member of it. And, an Item Category must exist before an Item can be added to it.

Use Case(s)

When initially setting up the system, or as new collections of Items are added to Dining, Retail or Billing areas of a Club, Administrative Users will need to know how to Add a New Item Category.

Example of an Item Category is as follows:

Food (Item Group)

Entree (Item Category)

Lobster Ravioli (Item)

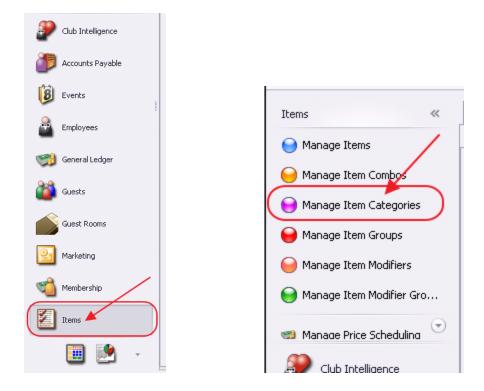
8oz Steak (Item)

Trout w/Crab Sauce (Item)

Navigation

To add a New Item Category:

- 1) Click on "Items"
- 2) Click on "Manage Item Categories"



Then, click, "New."

Club Intelligence Dashboard		Manage	Items	😝 Manage Item Categories 🛛 🗙				
Home								
New Edit	X Delete	Export	Refresh	Clear Filter	Active	(AII)	(?) Help	Search:
Drag a column he	der here to	group by	that column					
Name			🔺 💌 Iten	n Group				PO:
\$10 Menu			F&E	3- Food				
Accessory			Golf	- Accessories				
Appetizers			F&B	- Food				

Edit POS Item Category screen will launch.

dit POS Item Cat Name:				Display On	POS	FnB Category C Retail Category
Description: icket Message: Item Group: Percent Cost:	(None) (None) 0					C Billing Category
(tem Selection	Areas	Overrides	POS Item Button Style	POS Behavior	Print Configuration	
Selected Items Source: Item			T			

To set up a Category, general fields must be defined and settings must be made and saved for the record to exist.

General Category Fields

In the top of the Item Category form, the general fields for the Category must be defined.

First, the "Name" field for the Category must be entered.

Home New ×			
Edit POS Item Cat	egory		C
Name		🍌 🗖 Display On POS	FnB Category
Description:		Tipable	C Retail Category C Billing Category
Ticket Message:	(None)	Override Item Group Settings	
Item Group:	(None)	Auto-Increment Cover Count	Default Course: 0
Percent Cost:	0	Auto-Increment Seat	

Once name has been entered, hit the "tab" key to move to the next field. **"Description"** field may be populated if desired (for internal viewing only).

Edit POS Item Cat	egory			
Name:	Sandwiches		Display On POS	Fn8 Category
Description:		\leftarrow	Tipable	C Retail Category C Billing Category
Ticket Message:	(None)	Q	Rewards Eligible Override Item Group Settings	
Item Group:	(None)		Auto-Increment Cover Count	Default Course: 0
Percent Cost:	0	Г	Auto-Increment Seat	

The "**Ticket Message**" field can be utilized to add a message to the receipt when the Item is ordered. For example, Ticket message could be added to Wine Category to cross-market an upcoming Wine Tasting Event at a Club. Ticket messages can also be established at the Item level.

	Edit POS Item Cate	egory			
I	Name:	Sandwiches		Display On POS	FnB Category
I	Description:	1		Tipable	C Retail Category C Billing Category
	Ticket Message:	(None)		Rewards Eligible Override Item Group Settings	
I	Item Group:	(None)	30	Auto-Increment Cover Count	Default Course: 0
	Percent Cost:	0	E	Auto-Increment Seat	

The "Percent Cost" field may be populated with a theoretical cost percentage for this Category.

Edit POS Item Cate	egory			
Name:	Sandwiches		Display On POS	FnB Category
Description:		Ι	Tipable Rewards Eligible	C Retail Category C Billing Category
Ticket Message:	(None)	9	Override Item Group Settings	
Item Group:	F&B- Food		Auto-Increment Cover Count	Default Course: 0
Percent Cost:			Auto-Increment Seat	

For example, if costs in this category were estimated at 35%, 35 could be populated into the Percent Cost field. Gross Margin results could then be reviewed for Items within this Category (via the Interaction Reports, Inventory, Gross Margin report). If an Item has a cost dollar populated at the Item level, the Item level cost will override the Category cost percent.

General Category Settings

The "**Display on POS**" option (when checked), indicates that this Category will show up at the Point of Sale.

Display On POS	FrB Category
Tipable	C Retail Category
Rewards Eligible	C Billing Category
Override Item Group Settings	
Auto-Increment Cover Count	Default Course: 0
Auto-Increment Seat	

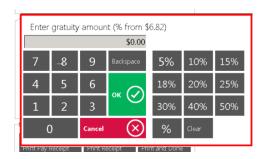
If the Category is marked as Display on POS, buttons can be configured to show the Category at the POS.



The **"Tipable**" option (when checked), indicates that gratuity can be added to the Items contained within the Category at the POS.



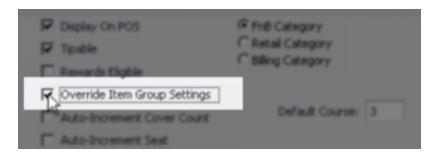
The amount available for gratuities will display in the POS. In the example below, \$6.82 is the tipable amount (comprised of Items within Categories set to "Tipable").



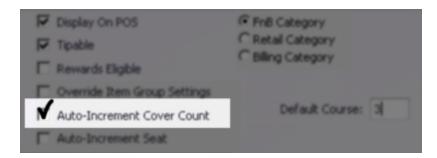
The "Reward Eligible" option is part of a future enhancement.



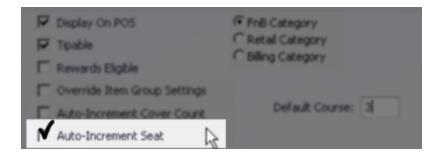
If G/L Overrides are needed at the Category level, the "**Override Item Group Settings**" option should be selected.



When the "**Auto Increment Cover**" option is checked, every time the Item is ordered, the System will automatically add another Cover count to the order. Note: this is also an Option at the Item level, and applies only to Food and Beverage POS.



When the "**Auto Increment Seat**" option is checked, every time the Item is ordered, the System will automatically navigate to the next seat. Note: this is also an Option at the Item level, and applies only to Food and Beverage POS.



In this section, the Category is designated into one of the following:

- 1) FnB Category: Food and Beverage Categories
- 2) Retail Category: Merchandise, Greens Fees, Court Fees
- 3) Billing Category: Dues, Late Fees

Home New X			
Edit POS Item Cate	igory		
Name:	Sandwiches	Display On POS	FnB Category
Description:		Rewards ElgG= 0	C Retail Category Billing Category
Ticket Message:	(None)	P Override Item Group Settings	
Item Group:	F68-Food	Auto-Increment Cover Count	Default Course: 0
Percent Cost:	0	Auto-Increment Seat	

If FnB Items are entered by course, enter the default course for which the Category should be assigned.



Additional Settings

Item Selection

Items within the Category will display on the "**Item Selection**" tab. This section allows for organization of Items within the POS screen. The "Always Alphabetize Items" button keeps the list alphabetized when new items are added to the item selection.

Selected Items Source: Item Select Items Aways Alphabetize Items Name Type	tem Selection Areas	Sverrides	POS Item Button Style	POS Behavior	Print
Select Items	Selected Items				
Aways Alphabetize Items	Source: Item		*		
	Select Items				
Name Type	Always Alphabetize Iter	ms			
	Name		Туре		
					- 1
					- 1
					- 1
					- 1
					- 1
	N				

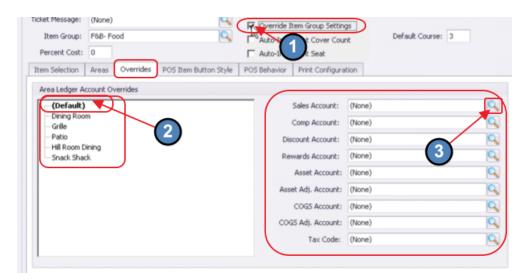
Areas

The "**Areas**" tab contains the areas of the Club. Once an area is checked, the Items within the Category may be sold in that area.

elected V	Name 🛛	Descrip 🗸	MemberChe	ckin 🛛	sPOSMemb V		bDisable	POSLaborTab	▼ POS_Navig ∇ ▼	E
	Admin		0			_				Ē
	Dining Room		0		FullName,Mem					-
Г	Pop Shack		0							
	Club Functions Ballroom		0							
	Guest Banquets		0							
Г	Fitness	Fitness &	2383							
	Grille		0		FullName,Mem			4		
	Patio		0		FullName,Mem					
Г	Club Functions Dining Rm		0							
Г	Club Functions Hill-AGB		0			0	0			
Г	Guest Bang. Dining Rm		0							
	Hill Room Dining		0							
Γ	Misc. Dining		0							
Г	Golf		2493		FullName,Mem					
Г	Tennis	Tennis	2383		FullName,Mem					
Г	Carlie's Retail Area		2383		FullName,Mem					
Г	Guest Rooms		0		FullName,Mem					
	Beverage Cart		0		FullName,Mem					
Г	Carlie's F&B Area		0		MemberNumb					
Г	Banquet Member		0		FullName,Mem					
Γ.	Banquet Non-Member		0							
	Timekeeping Only		0		FullName,Mem					
	Snack Shack	Snack Sh	0		FullName.Mem					

Overrides

Once the "**Override Item Group Settings**" option is checked, the Account fields will open for editing on the **Overrides** tab. The Accounts may be designated differently at a default Category level, or at the Area level(s) within the Category. The Account Lookup feature may be used to assist in Account selection. If one or more accounts are defined differently at the Category level, the Category level will override the Item's Group settings, and Items within the Category will follow the Category override designations. Override options are also available at the Item level.



If the override option is not selected and/or the account section is left blank, the system will default the Category G/L distribution to accounts defined at the Category's Group levels.

POS Item Button Style

The **"POS Item Button Style"** tab contains options relating to the POS screen designs. Edits to the Button Color, Font, Size, etc can be managed from this tab.

			1 New Alternative Sear
Item Selection Ar	eas Overrides	POS Item Button Style	POS Behavior Print Configuration
Background Color: Foreground Color:	0, 0, 0, 0	•	Image Height: 0 🗘 Image Width: 0 🗘
Caption H Align:	Default	•	POS Button Preview
Caption V Align:	Default	•	
Image H Align:	Default	-	
Image V Align:	Default	-	
Button Height:		0 ‡	
Button Width:		0 🗘	
Font Size:	0 ‡		

POS Category Buttons will display based on settings.

Apps Salad Sandwich Entree	Vine Beer Liquor
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Items within the Categories, will inherit the Category button styles (unless overridden at the Item level.)

Apps	Salad	Sandwich	Entree		Wine
King Crab Cakes (x86)	Caesar Salad	BLT	Filet Mignon 8oz	Ice Cream	House Chard
Spinach Dip	Seafood Salad	Burger	Pork Medallion	Cookie	House Cab

POS Behavior

The "POS Behavior" tab holds (3) options pertaining to printing behaviors.



The "**Print On Pay**" option tells the system to print Items from this Category on the Pay Receipt; the check the Server presents to the Member(s)/Guest(s) prior to the Member/Guest designating which form of payment will be used, and prior to additional gratuities being added.

The "**Print On Settle**" option tells the system to print Items from this Category on the Settle Receipts; the Receipt the Server prints to close the sale, after Member/Guest has designated form of payment and added additional gratuities.

The **"Do not print modifiers"** tells the system to exclude printing Modifiers (like Cooking Temperatures, or Toppings) on the Check.

Print Configuration

The "**Print Configuration**" tab holds instructions for printing, and specifies which prep printer this Category's Items will print to once ordered from the POS. Note: Any instructions set at the Item level will override those established at the Category level.

		Areas	Overrides	POS Item Button Style	POS Behavior	Print Configuratio	2n			
E	Message Type	From Typ	pe From	То Туре 🛆	To	Start Time	End Time	Day Of Week	Message	
4	*									
Γ										

Save and Close

Once Category Fields and Settings have been designated, click, "Save and Close," to complete the addition of the new Category.

Home New X							
Edit POS Item Cate	egory						
Name:	Sandwiches		Display On	POS	FnB Category		
Description:				ligible	C Retail Category C Billing Category Default Course: 3		
Ticket Message:							
Item Group:	roup: F&B- Food		Override Item Group Settings Auto-Increment Cover Count				
Percent Cost:	0		Auto-Increment Seat				
Item Selection	Areas Overrides	POS Item Button Style	POS Behavior	Print Configuration			