Create a New Item Category

2016 - Summer Edition

User Guide - Table of Contents

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)
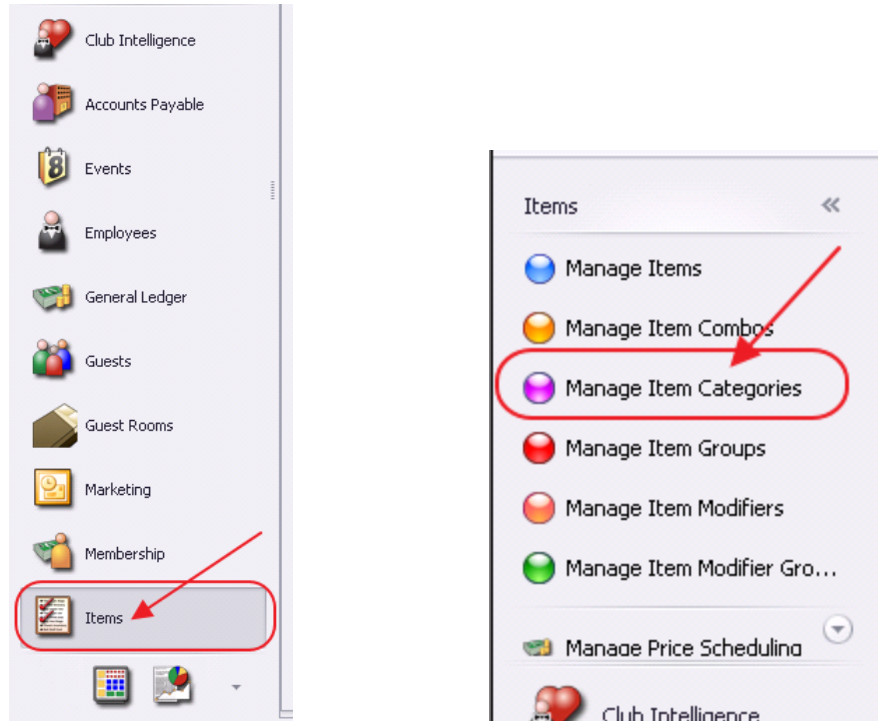
Entree (Item Category)

Lobster Ravioli (Item)
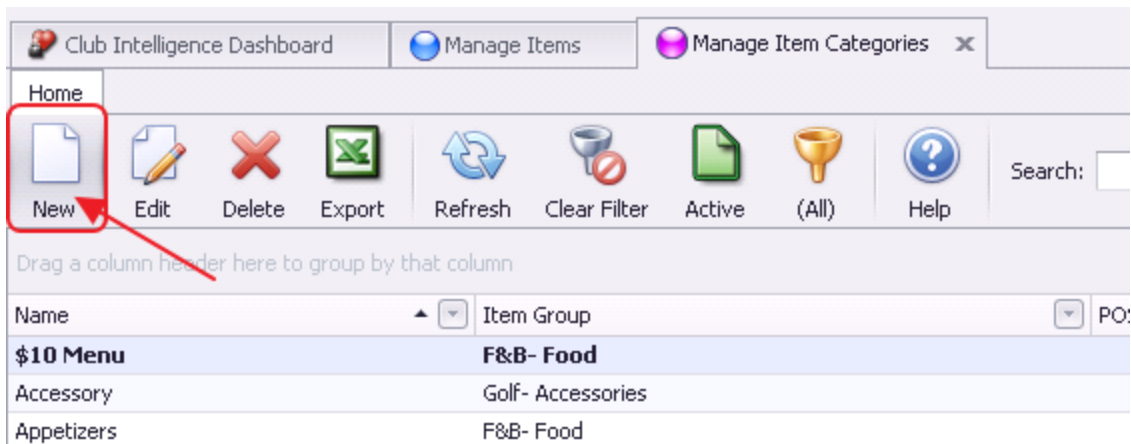
8oz Steak (Item)

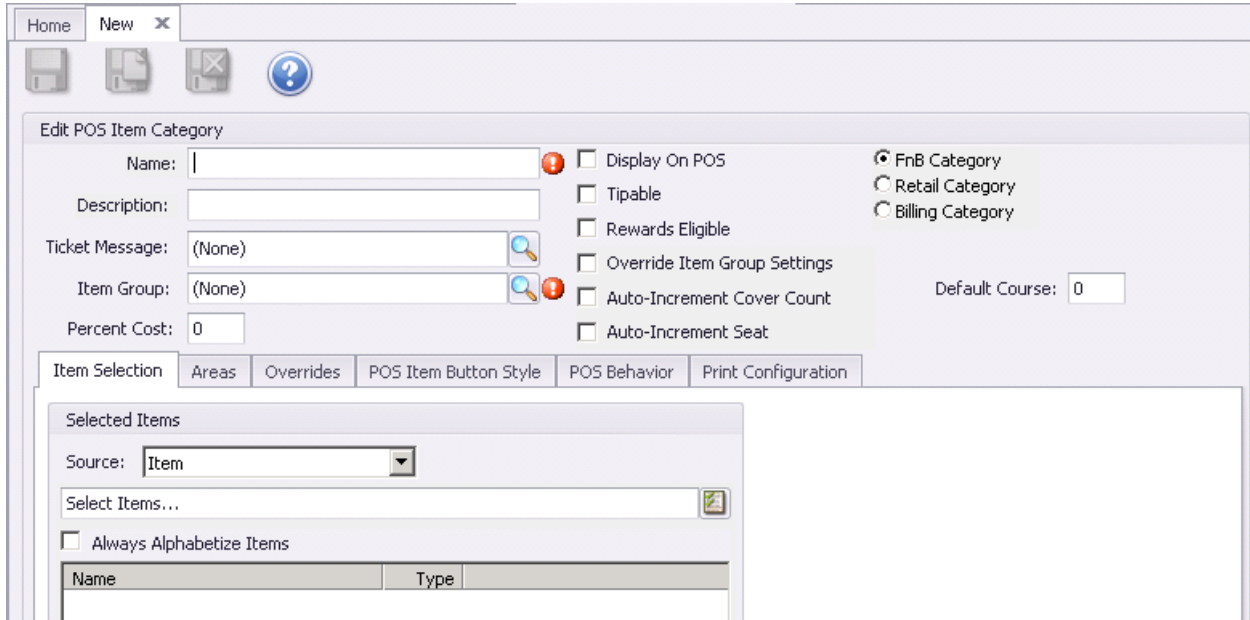Trout w/Crab Sauce (Item)

Navigation

To add a New Item Category:

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

Then, click, "New."
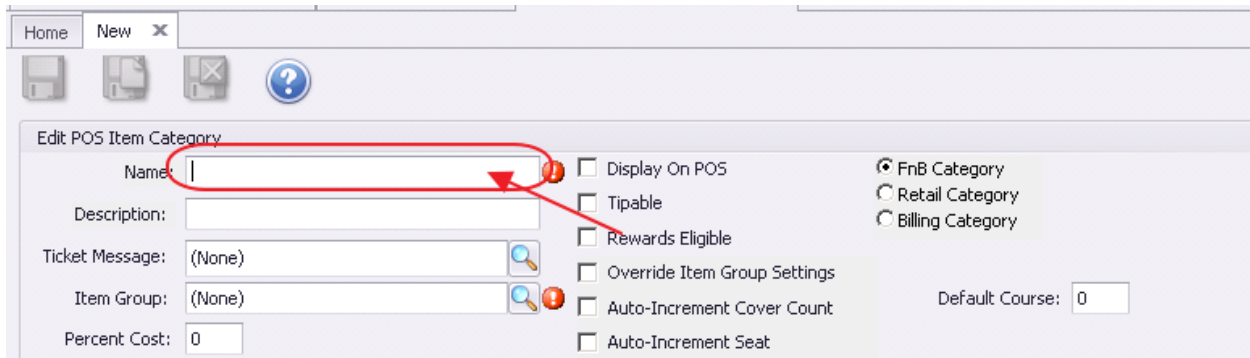
Edit POS Item Category screen will launch.

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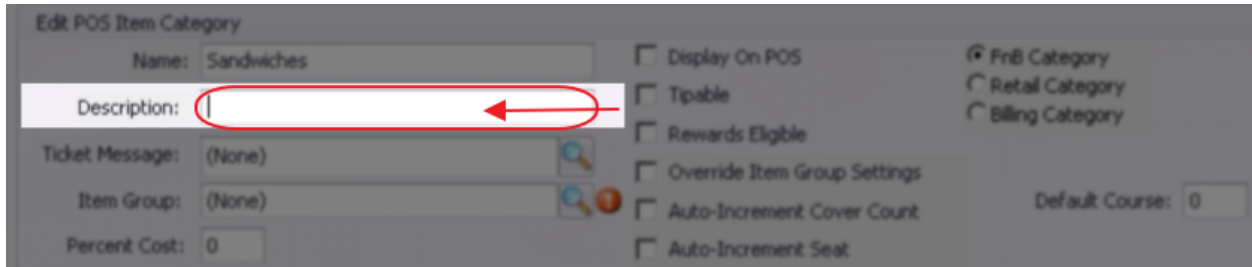
General Category Fields

In the top of the Item Category form, the general fields for the Category must be defined.
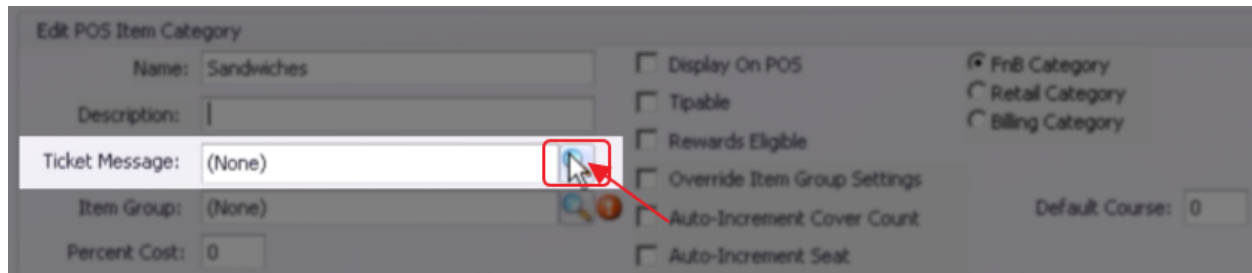
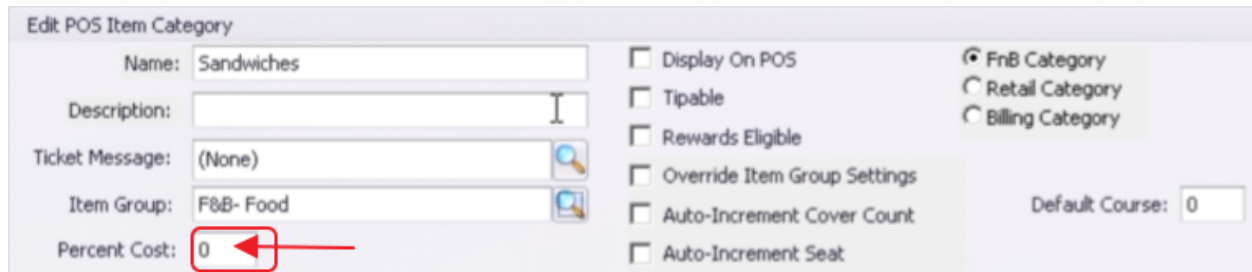First, the "**Name**" field for the Category must be entered.

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).

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.
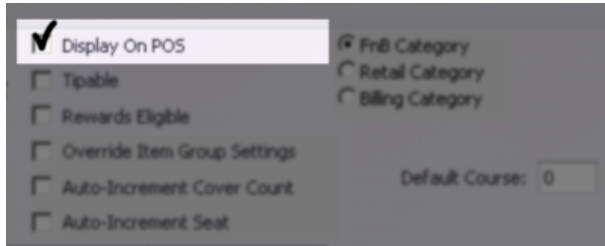

The **"Percent Cost"** field may be populated with a theoretical cost percentage for this Category.
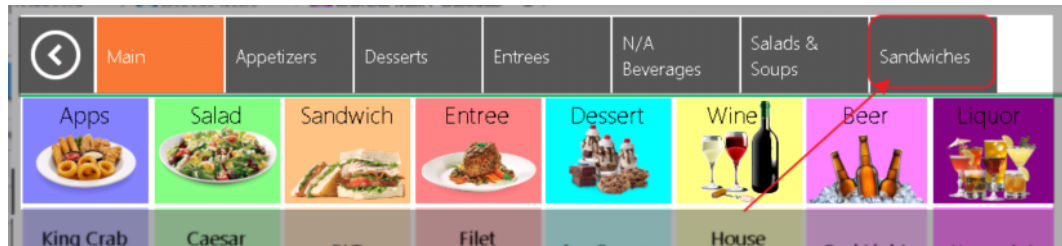

For example, if costs in this category were estimated at 35%, 35 could be populated into the Percent Cost field. Gross Margin results could then be reviewed for Items within this Category (via the Interaction Reports, Inventory, Gross Margin report). If an Item has a cost dollar populated at the Item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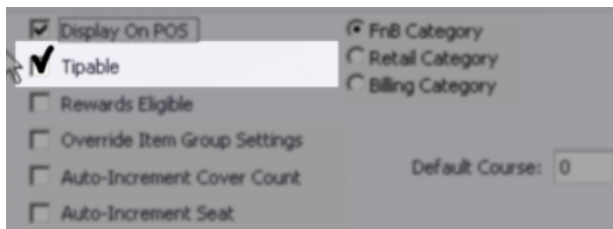
General Category Settings

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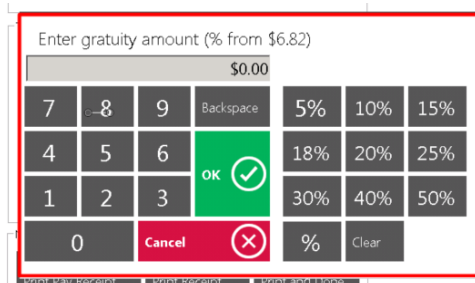

If the Category is marked as Display on POS, buttons can be configured to show the Category at the POS.

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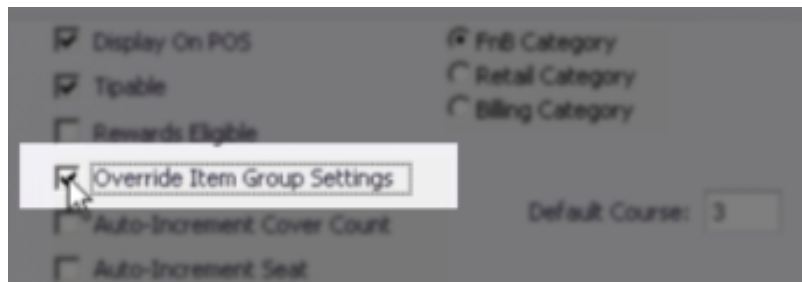

The amount available for gratuities will display in the POS. In the example below, $6.82 is the tipable amount (comprised of Items within Categories set to "Tipable").
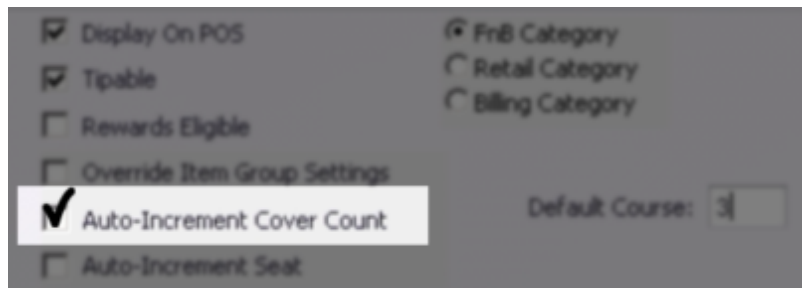
The "**Reward Eligible**" option is part of a future enhancement.

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.
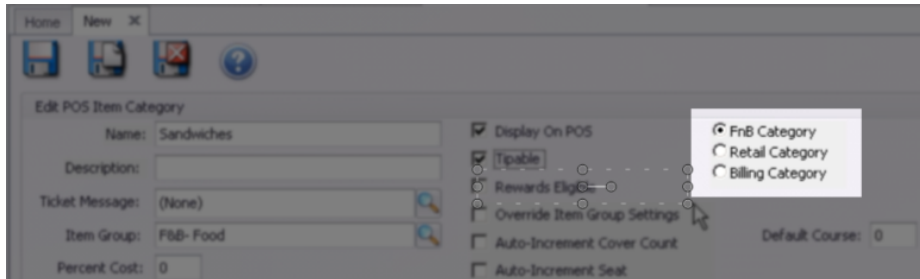

When the "**Auto Increment Seat**" option is checked, every time the Item is ordered, the System will automatically navigate to the next seat. Note: this is also an Option at the Item level, and applies only to Food and Beverage POS.
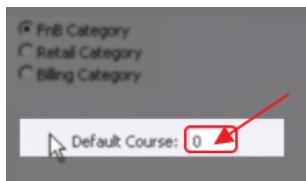
In this section, the Category is designated into one of the following:

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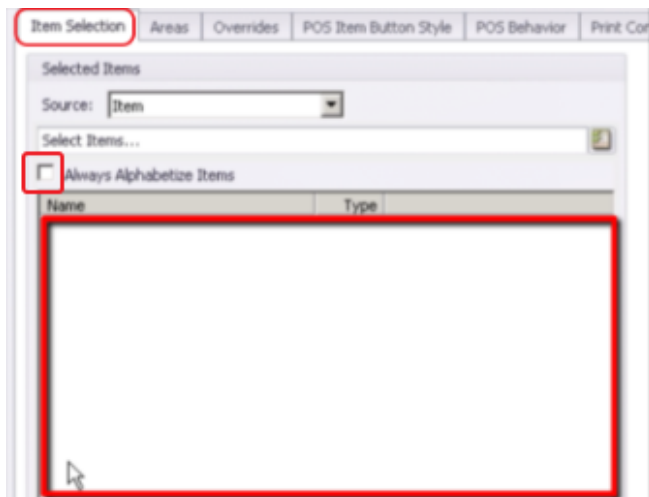3) **Billing Category**: Dues, Late Fees

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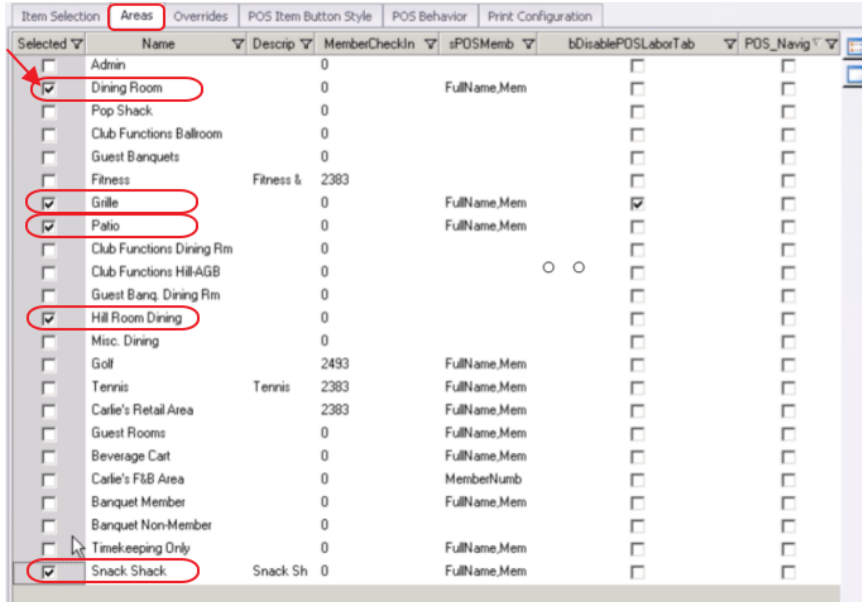

Additional Settings

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.
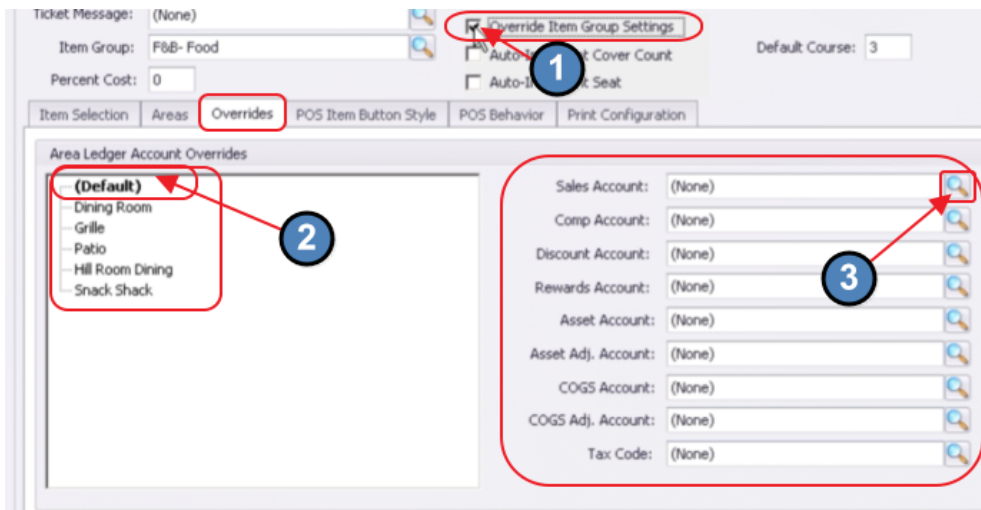
Areas

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.
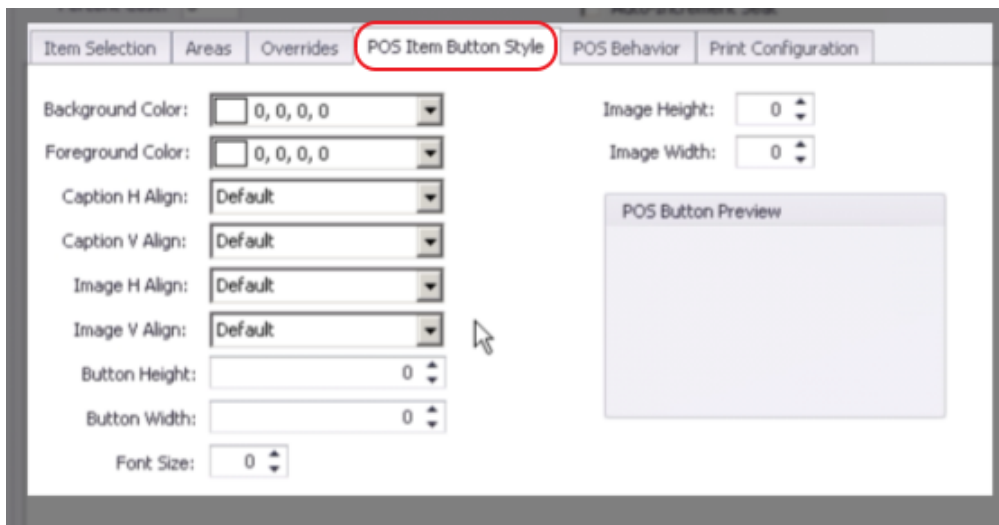

Overrides

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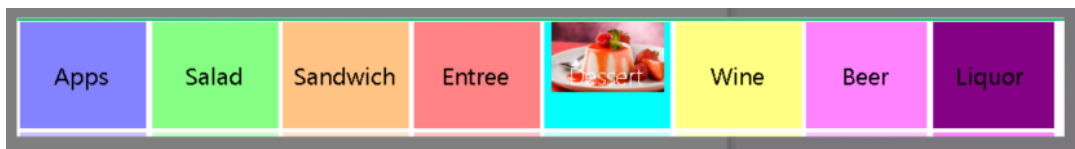
If the override option is not selected and/or the account section is left blank, the system will default the Category G/L distribution to accounts defined at the Category's Group levels.

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.

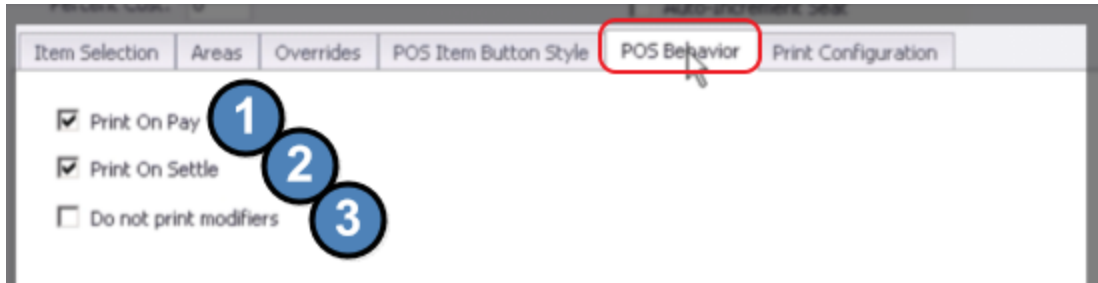POS Category Buttons will display based on settings.

Items within the Categories, will inherit the Category button styles (unless overridden at the Item level.)

POS Behavior

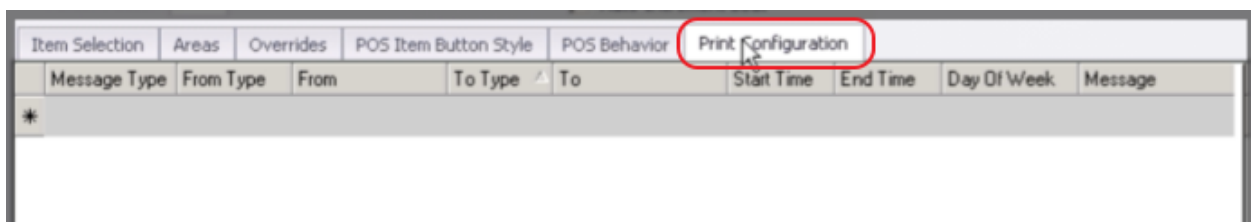The "POS Behavior" tab holds (3) options pertaining to printing behaviors.

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.

Save and Close

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