



Area Categories

2017 - Spring Edition

User Guide - Table of Contents

[Overview](#)

[Use Case\(s\)](#)

[Accessing the Tool](#)

[Creating a New Area Category](#)

[Associating an Area with an Area Category](#)

[Best Practices](#)

[Frequently Asked Questions](#)

Overview

Area Categories are solely designed as a club specific solution to classifying Areas for reporting purposes.

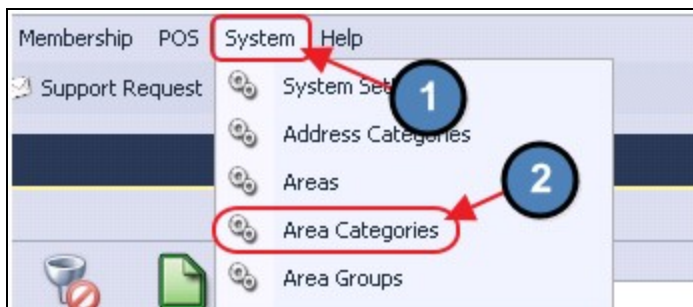
Use Case(s)

- When viewing the Monthly Sales Summary report, the results can be viewed by specific or all Area Categories.

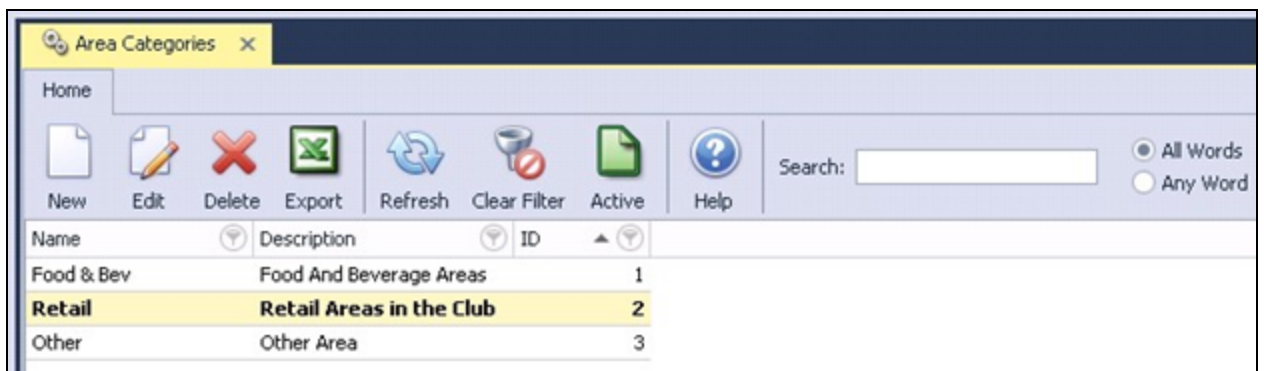
Accessing the Tool

To access **Area Categories**,

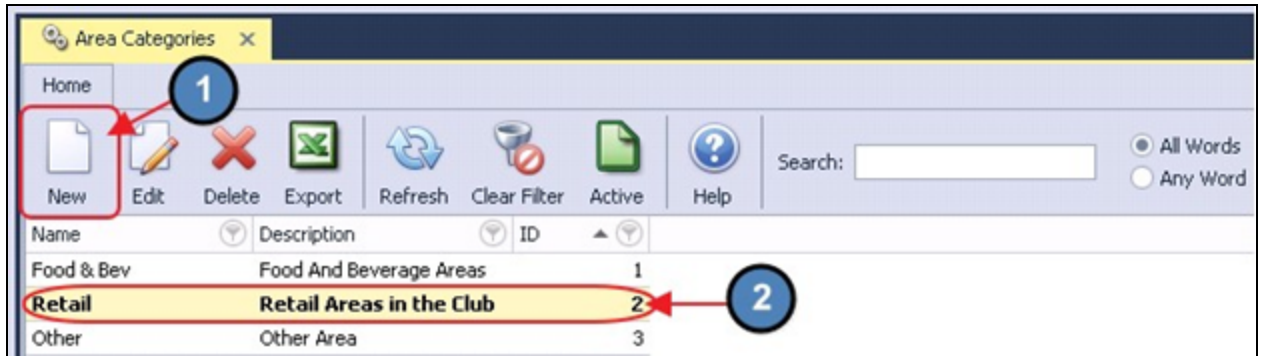
- 1) Navigate to **System** across the top toolbar and select **Area Categories**.



- 2) The **Area Categories Grid** will launch.

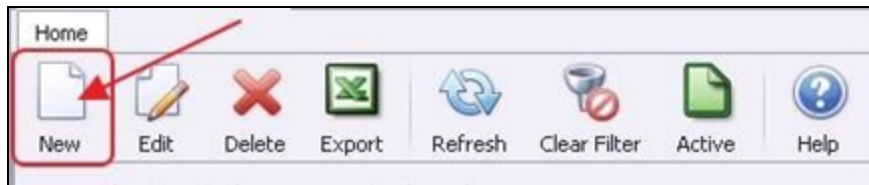


- 3) The primary functions associated with managing Area Categories are embedded in the Area Categories setup screen, which can be accessed by double-clicking on an existing Category, or clicking the **New** button.

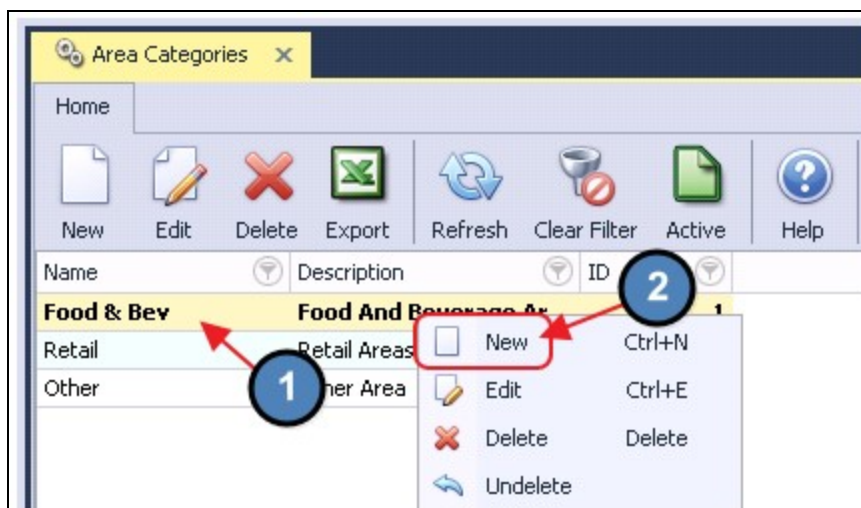


Creating a New Area Category

- 1) Navigate to the **Area Categories Grid** and perform either of the following to launch the Area Category setup screen:
 - a) Click the **New** icon on the toolbar.



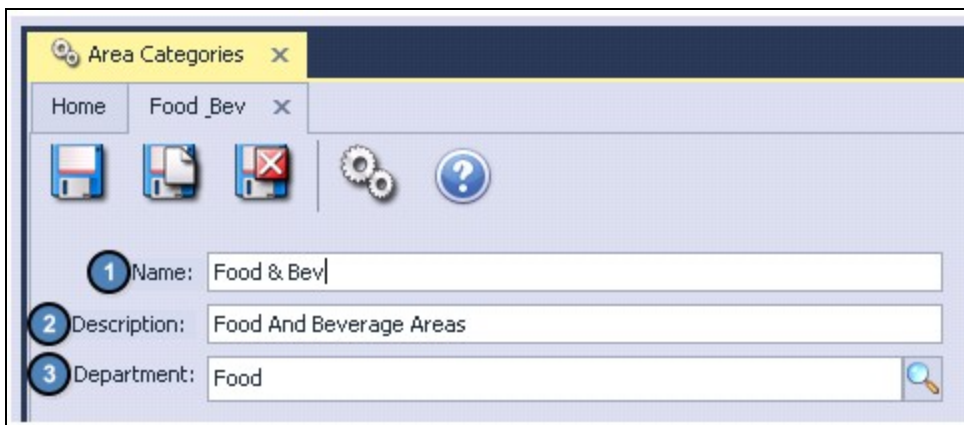
- b) Right-click anywhere on the Area Categories Grid and select **New**.



- 2) The **Area Categories** setup screen will launch.



- 3) Please enter the below information:

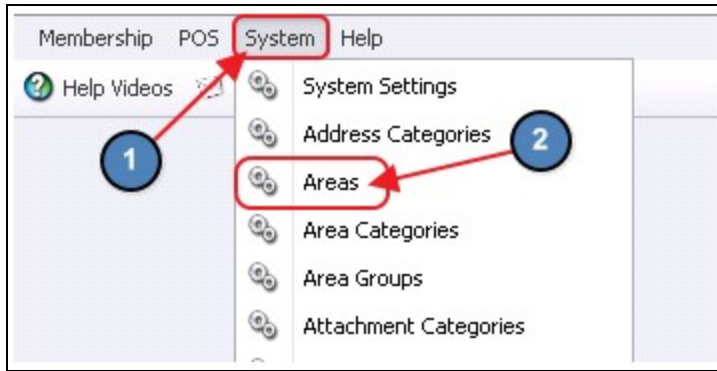


- 1) **Name** - Give the Area Category a name.
- 2) **Description** - An optional description can be added to the Area Category for internal purposes.
- 3) **Department** - Select the department to be associated with the Area Category. The department selected here will have no impact on the General Ledger. Again, Area Categories are more for reporting purposes.

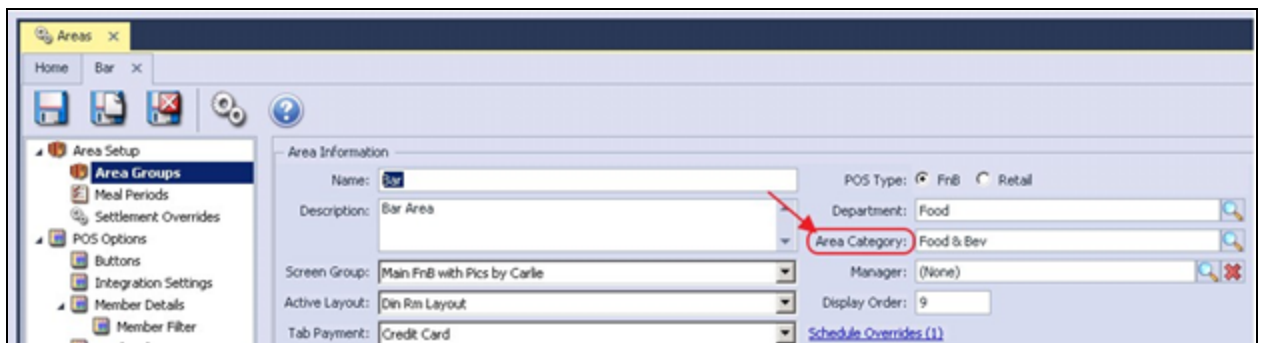
Associating an Area with an Area Category

Area Categories are a required field when setting up Areas. To apply an Area Category to an Area:

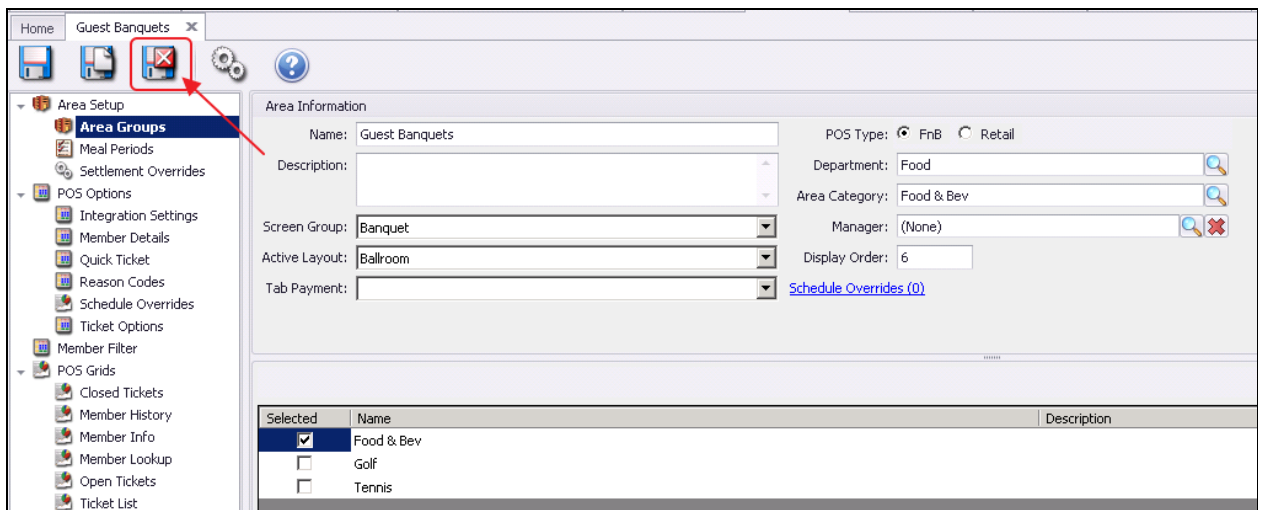
- 1) Navigate to **System** across the top toolbar and select **Areas**.



2) Double click the applicable Area and enter the appropriate **Area Category**.



3) When finished, click **Save & Close**.



Best Practices

- It is recommended to have at a minimum (3) Categories set up in the system covering Food & Beverage, Retail, and Other (however, this may vary based on Club operations).

Frequently Asked Questions

What is the primary difference between an Area Group and an Area Category?

Area Groups define how transactions are categorized for batch processing as it relates to the POS, and Credit Book. Area Categories, however, facilitate overall reporting functions, and are required to be associated with an Area upon setup.

