

Setting Up and Using Categories

Categories can help you organize your inventory. Products can be classified based on season, size, color, shelf location, and so on.

Taking the time to define these classifications is well worth the reporting and purchasing benefits.

Objectives

- Defining the Category Hierarchy
- Adding a Category
- Editing a Category
- Deleting a Category

Defining the Category Hierarchy

From the main menu, select **Products > Setup > Categories**.

Select **Actions** and then choose **Define Category Hierarchy**.

You can define up to six levels of categories here.

For example, the top level might be defined as a 'Department'.

Below that, the next level could be the 'Class' the products are found in and finally, a third level could indicate the 'Fineline'.

Use the **minus** button to remove a category level and the **plus** button to add a new category level.

When you are ready, tap **SAVE** to save your new hierarchy.

Adding a Category

Now that you have your category hierarchy defined, let's add a new category.

Select the **Add New** icon to get started.

On the **ADD NEW CATEGORY** screen, enter the required information.

For example, code 10, Home and Decor, could be set at the department level.

Further, we can add Light Fixtures as a **Class** and **Lamps** as a Fineline.

The table gives you a preview of the category hierarchy.

Adding an image to the category helps your staff quickly identify them in Quick Find at Point of Sale.

Select **ADD IMAGE(S)** to add an image.

When you are ready, tap the **ADD** button.

Editing a Category

On the **Categories** screen, use the checkbox to select the category you want to edit.

Tap the **Edit** button.

You can now make changes to this category.

For example, change the description of a category.

When you are ready, tap the **Save** icon.

Deleting a Category

You can only delete a category if there are no products assigned to it.

On the **Categories** screen, select the category you want to delete.

Tap **Actions**.

Tap **Delete Categories**.

Recap

Use categories to better manage inventory.

In this course, we showed how to set up the category hierarchy and then add a department, class and fineline level.

We also looked at editing and deleting categories.

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