

# Creating Categories

Customer Services

Sparkstone Technology Ltd



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## Introduction

This document outlines the workflow for the creation of categories within the Sparkstone Retail EPOS System. These notes are designed to complement the training that you will have received on the Sparkstone Retail EPOS from a Sparkstone training consultant or system administrator. They are not intended to be a complete overview of the software but are designed to assist you at a later stage when you are away from the training session.

These notes have been compiled to reflect the configuration of the Sparkstone EPOS system at your site and as such may only contain information pertinent to the operations that you require. If additional modules are purchased at a later date, training notes will be provided as appropriate on completion of the associated training course.

## Objectives

To provide an overview of the processes involved in creating categories and sub categories.

## Conventions Used

Menu paths will be indicated throughout this training manual in bold.

For example:

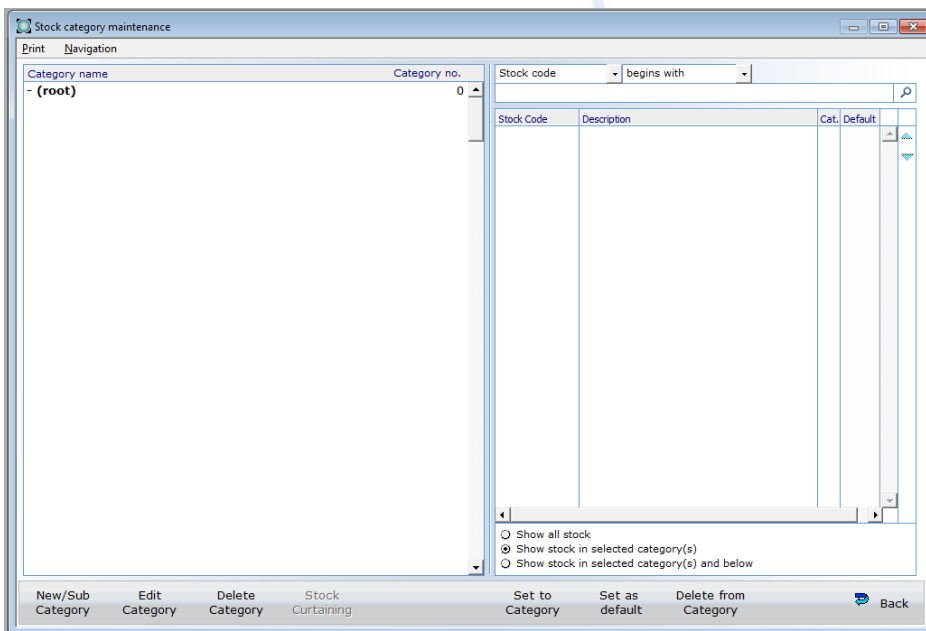
### **Back Office | Product file | Stock Records**

Indicates that you should access Stock Records window from the Back Office using the Product File on the drop down navigation menu.

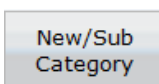
# Categories

## Creating New Categories and assigning stock

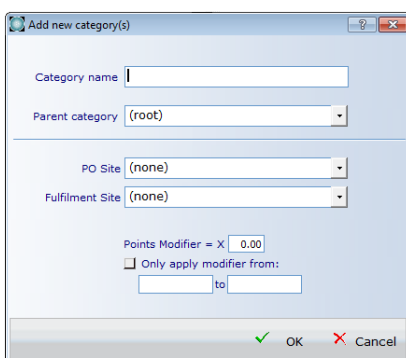
A good way to distinguish types of stock items is to create categories and to assign stock to them. To do this, go to the **Back Office | Product File | Stock Administration | Categories:**



The default view will show all of the stock being assigned to the root. To add a new category go to **New Sub/Category** in the bottom left of the screen:



The following window will open:



Type in the category that you wish to create and click 'OK'.

In this case, the category 'Accessories' has been created.

Category name	Category no.
- (root)	0
- Accessories	13

To search for stock items that have not got a category assigned to them, select 'show all stock' towards the bottom half of the right pane:

Show all stock

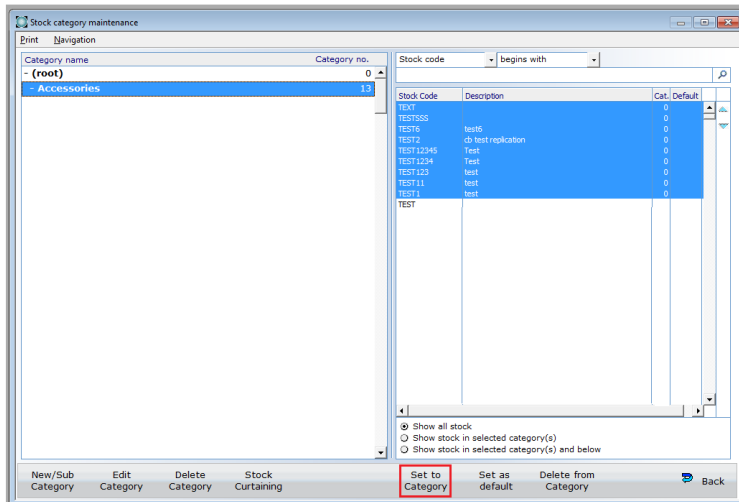
Then put the cursor in the box at the top of the page underneath stock code and press tab:

Stock code  begins with

The stock will then show in the list underneath:

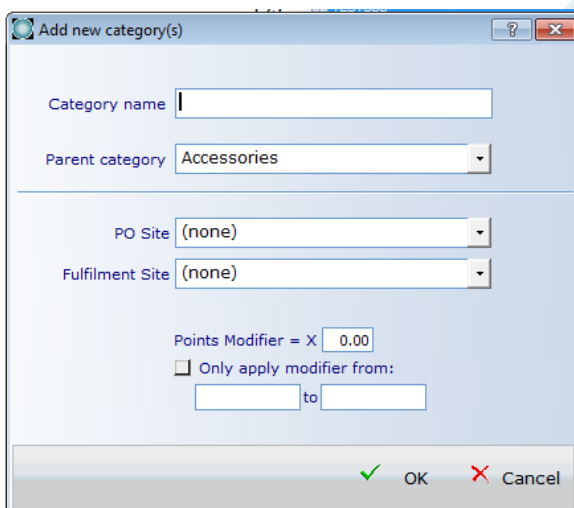
Stock Code	Description	Cat.	Default
TEXT		0	
TESTSSS		0	
TEST6	test6	0	
TEST2	cb test replication	0	
TEST12345	Test	0	
TEST1234	Test	0	
TEST123	test	0	
TEST11	test	0	
TEST1	test	0	
TEST		0	

The column labels at the top can be selected to re-order the data presented in the table. All of the items will have category zero assigned to them at this stage. To assign some stock to the Accessories category, select the stock on the right hand side by clicking and dragging it, then select the category to assign it to and click on 'Set to Category':



Once these items have been set to the category, the category number will change from zero to that which has been selected. In the 'Default' column, 'YES' will be shown as the first category the stock is assigned to will be the default.

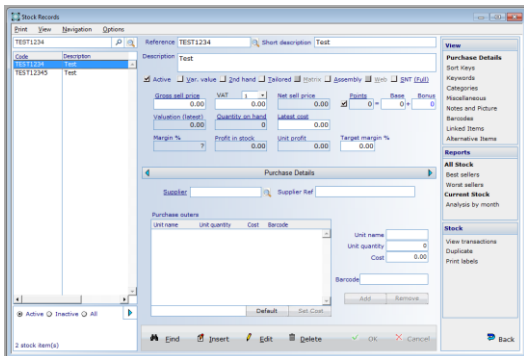
New Sub Categories can be set up once the main categories have been created by going to New/Sub Category as before. For sub categories, the parent category can be selected in the drop down:



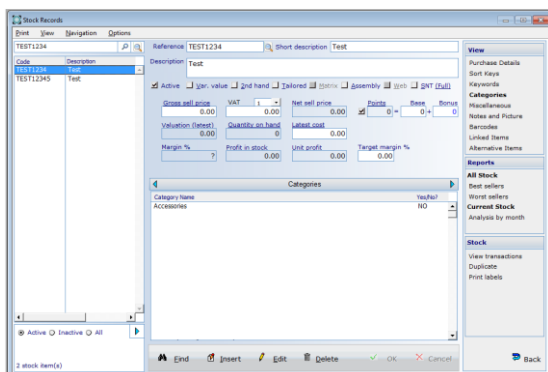
The sub category will show underneath the parent category in the category maintenance window. The parent categories show in bold.

## Assigning categories to stock in the Stock Record Window

Once the categories have been created, stock can also be assigned to the categories from the Stock Record window. To do this, go to the **Back Office | Product File | Stock Record** and either press tab for all of the stock items to show, or type in a specific reference to look at a specific stock item:



To see the category that the stock is assigned to, select 'Categories' under 'View' and this will show the following:



To assign the stock record to a particular category, go to 'Edit' and double click on the category name and the 'NO' will change to 'YES' on the right hand side. This shows that the category has been selected.

If you have the lookup grid available in the front end of the till, the categories will show in there:

