



Category Setup Guide

Version 4.3

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This Administrator Guide deals with the setup and configuration of uniCenta oPOS after installation. It is a "How to" of key points for Products, Security and User Permissions to enable a quick customization to suit the users operation.

Foreward

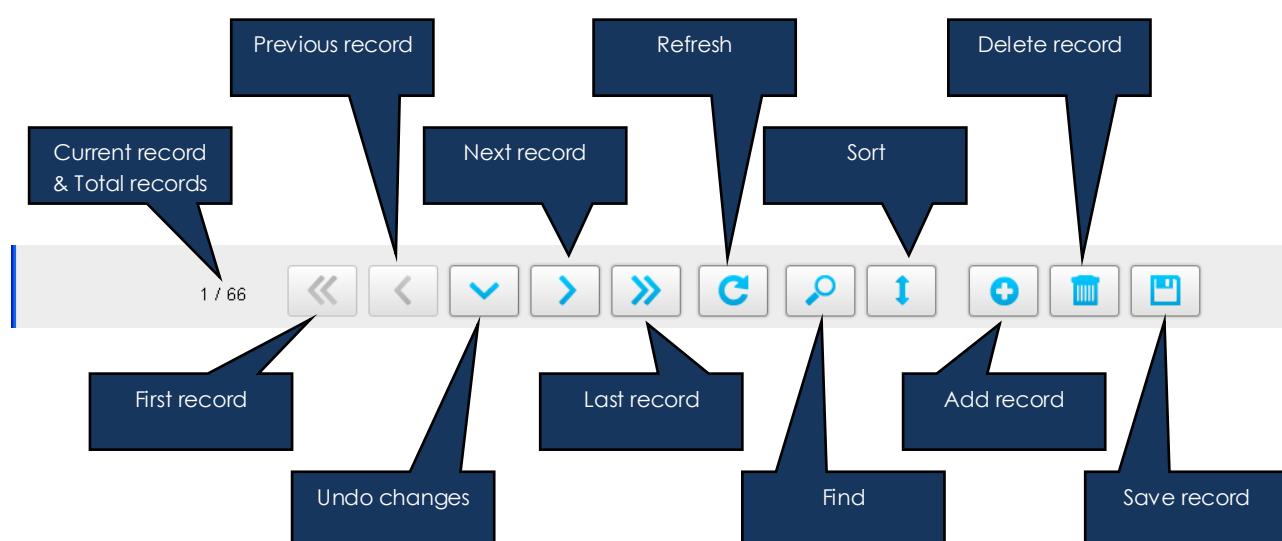
The focus of this document is the correct set up of uniCenta oPOS Product Category.

Date	Version	Author	Comment
June 2017	4.3	Jack Gerrard	Final

Useful things

Editor Toolbar

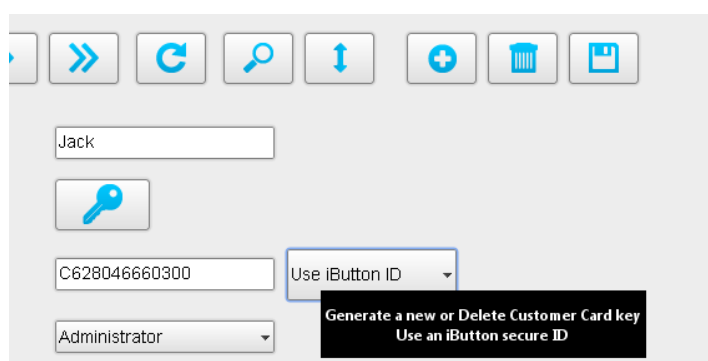
You will see this toolbar is used throughout uniCenta oPOS so here's a quick overview of what the buttons do. The Editor Toolbar appears in all record management forms.



Tooltips

Lots of things in uniCenta oPOS use pop-up Tooltips.

All you have to do is hover your mouse pointer over a component for a second and it will give you a brief description of what it does. Tooltips are constantly being added or revised as uniCenta oPOS development progresses.



OVERVIEW

Categories are a convenient and powerful way of grouping Products.

There is no right or wrong way how to structure Categories and it depends entirely on what suits your business.

In fact you could just use the default Category Standard - created automatically at time of install – if that is preferred.

Speed, ease and accuracy selecting Products, when serving customers; overall system management and the depth of reporting analysis you want to see are all important factors. What needs to be achieved is a balance that best suits your operation.

KEY POINTS:

- uniCenta oPOS can have unlimited Categories
- A Category may be a sub-Category of another
- A Category may be attached to any other Category whether a Parent or Child of another

Even after a Category has been created and Products assigned to it; changing its name or placing it as a child of another Category means that all associated Products immediately move with it.

It is important to consider the structure of Categories as this affects the way uniCenta oPOS performs in several areas.

- Sales Screen : The grouping of Product buttons and the speed of access
- Reporting : The grouping and totals of the Category data
- Filtering: The level of depth when selecting data both on forms and reports

IMPORTANT:

Avoid having more than a thousand Product's per Category if you have a low-spec' machine and especially if you have images attached to Products. It's far better to "chunk" these down for example: 1 Main Category with 10 sub-Categories of 100 Products each.

You cannot DELETE a Category which has linked Products that have any Sales or Inventory transactions recorded against it.

EXAMPLE INSTALLATIONS

GENERAL STORE - *Speed*

- 10 Main Categories + 5 sub-Categories
- 10,000 Products
- Uses Barcode scanning

BIKE STORE - *Flexibility*

- 20 Main Categories + 3 sub-Categories per Category + 5 sub-Categories per sub-Category
- 1,500 Products
- Mainly Barcodes but with some manual

RESTAURANT - *Control*

- 5 Main Categories + 5 sub-Categories per Category + 5 sub-Categories per sub-Category
- 300 Products
- No Barcode all touch input

CATEGORY STRUCTURE EXAMPLE - SIMPLE

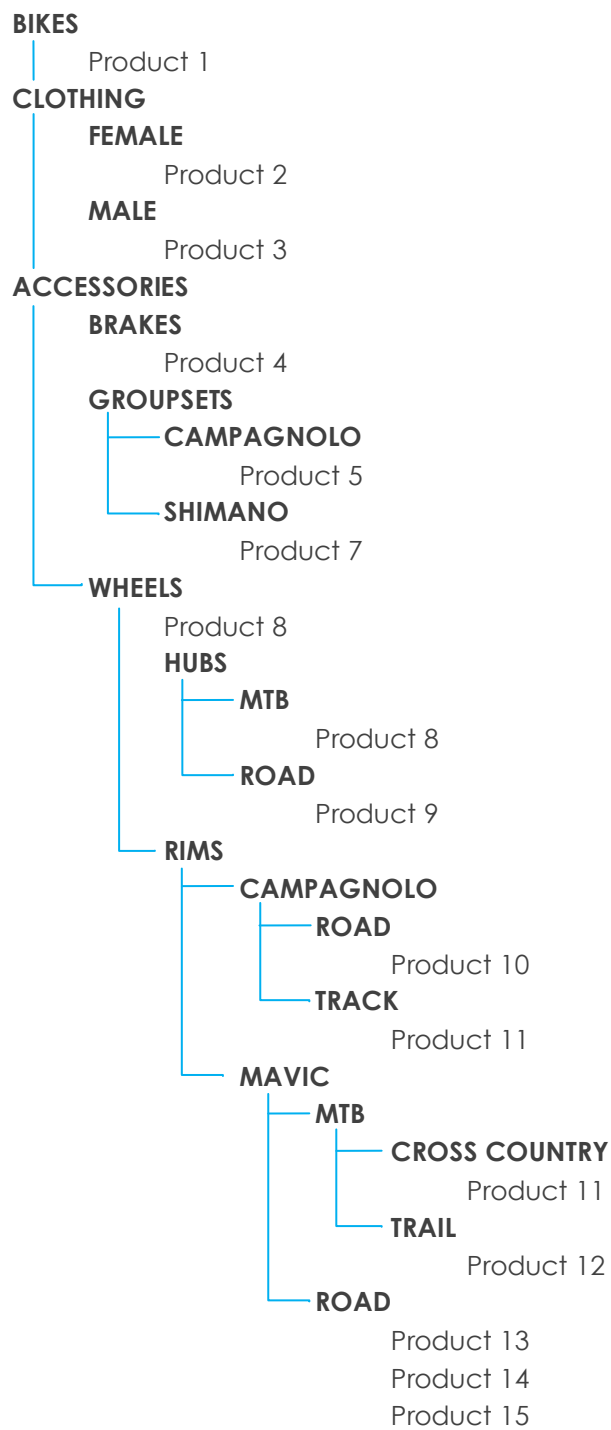


It can be seen in this structure the nesting is quite shallow and most Products are at most only three touches away.

In the BIKES Category you want to be able to separate Children from Adult Products yet in the Adults group you want to have some additional separation to quickly see what type of Bike has been sold or have in stock for that group.

In Frames the manufacturer is more important to you than any other attribute of a Bike such as style or frame size – which by the way you could easily set in Product Attributes.

CATEGORY STRUCTURE EXAMPLE - COMPLEX



The deeper the nesting the more touches in the Sales screen are needed to locate it if not using a Barcode scanner.
However, the depth of analysis in reporting is more focussed.

CATEGORY STRUCTURE EXAMPLE - RESTAURANT

FOOD

HOT

BREAKFAST

Product 1

LUNCH

PASTA

Product 2

PIZZA

Product 3

DINNER

Product 4

COLD

LUNCH

Product 5

DINNER

Product 6

SIDES

Product 7

SIDES

Product 8

DESSERTS

Product 9

DRINK

ALCOHOLIC

BEER

BOTTLED

Product 10

DRAUGHT

Product 11

WINE

RED

BOTTLE

Product 12

GLASS

Product 13

WHITE

BOTTLE

Product 14

GLASS

Product 15

NON-ALCHOLIC

SODAS

Product 16

JUICES

Product 17

WATER

Product 11

Even though the level of Categories is increased the structure is less complex and already familiar as it is will follow the present hard-copy menu offered to customers.

The deeper nesting requires more touches in the Sales screen – like in the DRINKS Category - yet accessing a specific Product can be quicker to locate
However, the depth of analysis in reporting is more focussed.

CATEGORIES

uniCenta oPOS - 4.3.2

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uniCenta oPOS - Touch Friendly Point Of Sale

Categories

5 / 87

+RDV
A2MG
AN
Amamulya
BEER
BEVERAGES
BOTTLED
Biyanka
Blue + Pink (Bulk)
Blue Deer
Boubou
BruneBlonde
CHEF SPECIALS
CHICKEN
Candy
Catsdeco
Chips
Compos IT
DESSERTS
DRAUGHT
Deli Cheese
ESPRESSO
Epikuryen
Euphory
Furvus
GARLIC BREAD
GMG
GRILL
GaelleGonzalez
Gaetan De Chazal
Gizz
GlowinSpirit
GressCat

Name * BEER

Category BEVERAGES

Text Tip Beer on tap

In Catalogue? OFF

Display Name in panel ☒ Order

Image

25%

Administration>Stock>Categories



Double-click to copy this Category's unique ID assigned by the system to your system's Clipboard for use elsewhere

Name : Mandatory + Unique

A meaningful description

Category :

Leave blank if a top-level Category or select from the drop-down list if it is sub-Category

Text Tip :

Enter any text here to add additional info' you want to display about this Category

In Catalogue? : Default ON

Whether or not this Category will display in the Product Catalogue report.

Display Name in panel : Default Checked

Whether or not this Category will display in the Sales screen Category list

If unchecked the Category will not be visible in the Sales screen Category list and neither will the Products that are linked to it.

Order : Default Null

Assign a number here to over-ride the default alphabetical sort of the Sales screen's Category list. It also applies to sorting sub-Categories within a top-level Category.

The Ordering sequence is Ascending starting from Null to 9999

Image :

An image to help quick visual identification of the Category in the Sales screen Category list.

Accepts jpg, png, gif or bmp. Recommended: Maximum 250x250 pixel jpg