

Department & POS Flag Setup

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Departments, Department Groups, & POS Flags

When creating and / or editing Pricebook items, part of the item setup involves assigning items to a **Department**. These Departments are necessary for the proper function, grouping, and categorization of items.

Along with granting the user a more organized method of item editing and reporting, crucial POS functions are associated to Departments via the assigned **POS Flag**. POS Flags control the taxes applied to items, if identification is required to purchase an item, and various other sale specific options. **POS Flags** directly affect the register side of item management.

Once a **POS Flag** is created and assigned to a **Department**, Departments can be assigned to a **Department Group**. Although there are no function specific options in Department Groups, they do offer a "top level" form of organization. When a User is utilizing the Mass Updates utility or running reports, starting a filter from the Department Group is a quick way to weed out unwanted information.

Please see the sections below for an overview of POS Flag, Department Group, and Department setup.

Maint	enance							Maintenance								
Time Cl	lock Stores Departments Dept Groups Tenders POS Rags F	OS Accounts Employees	Vendors He	ouse Accounts	Negative Ch	neck Logir «	>	Time Clock Store	B Departments De	pt Groups Tenders	POS Flags	POS Accounts	Employees Ve	indors House A	ccounts Negat	ive Check Logir < >
Existin	ng Department Groups							Existing Department	5							
Grou	p # Group Name					^		Dept # N	ame	Dept Group		Product Code	POS Flag	Add To Sales	Target GM	RPCI Code ^
19	ALCOHOL								RATOM	MISC TOBACCO			NUTRACEUTIC		0	
18	ALTERNATIVE TOBACCO	Maintenance						10 0	ITANE	NICC TOBACCO	`		TOBACCO	✓	0	=
10	ATM SERVICE	Time Clock Stores D	epartments Der	t Groups Te	nders PO	Bage POS	Accounts Employ	vers Vendors H	use Accounts Negatin	e Check			TOBACCO	✓	0	
4	BOTTLE DEPOSIT	Existing POS Flags	oparation to a bog			inga i toor	Line Lines		in the second second		4		TOBACCO	✓	0	
5	BOTTLE RETURN		 Tax Group 	Sign	Age Req	Prompt ID	Exception ID	Coupon Family Code	Excise Tax Rate	Excise Tax Desc			TOBACCO	✓	0	
13	CIGARETTES	FOOD STAMPS	▲ Tax Group	aign	Age neq	Prompt ID	D D	Coupon Pamily Coo	0.0000	Excise Tax Desc			TOBACCO	✓	0	
101	CLOSEOUT	NEGATIVE NON-TAXABL	5 2		0	0	0		0.0000		DISE		Taxable	✓	0	
14	DONATIONS	NEGATIVE TAXABLE	1	-	0	0	0		0.0000		DISE		Taxable	✓	0	
20	GASOLINE	NON-TAXABLE	2	+	0	0	0		0.0000		OBACCO		Taxable	~	0	
1	GEN MERCHANDISE	TAXABLE	1		0	0	0		0.0000				TOBACCO	✓	0	
8	GIFT CARD	TAXABLE ALCOHOL	1		21	0	0		0.0000				TOBACCO	~	0	
6	GIFT CERTIFICATE	TAXABLE TOBACCO	1	+	18	0	0		0.0000				TOBACCO	✓	0	
3	GROCERY ITEMS	TAXABLE TOBALCO	1	+	10	U	U		0.0000				TOBACCO	~	0	
100	INACTIVE												TOBACCO	✓	0	~
11	LOTTERY															
15	MACHINE RENTAL												POS N	ame: KRATOM		
12	MISC TOBACCO															
16	MOBIL COUPONS										rica 🗸	Inv Code:	COGS C	ode:	AP Code:	
9	NEWSPAPER/MAG											Max Amount: 9999	9.99 Target	GM: 0.00	Add To Si	ales 🖌
2	NON-ALCOHOL BEV											Discount 3: 0.00	Dieseur	nt 4: 0.00	Add To CTN Co	
	0.000 0.000															
	rtment Group Details										Override	e Order Days: 30	Override	Type: Override	~	
Dept	Group Number: Name:															
	5 💾 🖶 5	<								>						
		POS Flag Details									8	When Printing, Sort I	By Department Name	~		
		POS Flag Name: FOOD	STAMPS	Tax	Group: 211	AXABI F	✓ Sig	n: + ∨ Age	Required: 0							
		Excise Tax Rate: 0.0000		e Description:	-			Now Food Stamps								
		Character in the course	2008	e beseiptori.	L			aon rood statips								
		1														

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POS Flags

POS Flags control assigned sales parameters for items when entered at the POS/Register.

Taxes applied, age requirements, and price changes are a few of the options controlled via POS Flags for tendered items.

After logging into Director, choose the Maintenance module.
 After logging into Director, choose the Maintenance module.
 Once in the Maintenance module, choose "POS Flags"

3) This will open the "POS Flags" utility

If this is a new install and you are using a **FasTrax** supplied starter database, you may notice there are a few POS Flags already setup.

These are often used flags we have preconfigured. You are welcome to edit these to fit your particular needs.

Remember to choose the **SAVE** option to apply any changes you make.

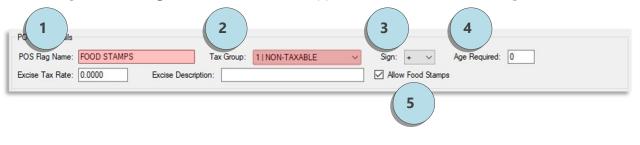
POS Rag Name 🔺	Tax Group	Sign	Age Req	Prompt ID	Exception ID	Coupon Family Code	Excise Tax Rate	Excise Tax Des
OOD STAMPS	2	•	0	0	0		0.0000	
NEGATIVE NON-TAXABLE	2		0	0	0		0.0000	
EGATIVE TAXABLE	1		0	0	0		0.0000	
ION-TAXABLE	2	+	0	0	0		0.0000	
AXABLE	1	+	0	0	0		0.0000	
FAXABLE ALCOHOL	1	+	21	0	0		0.0000	
FAXABLE TOBACCO	1		18	0	0			
				J			0.0000	
							0.0000	
							0.0000	
OS Rag Details								
		ise Description	Tax Group: 21		Si	n: • · · · Age Rei Non Food Stams	0.0000	

 If this is to be a new POS Flag, first choose the "Add POS Flag" button



If you wish to edit an existing flag, simply highlight the applicable flag from the "**Existing POS Flags**" grid and edit in the "**POS Flags Details**" area.

5) Using the "POS Flags Details" section, enter applicable information for this flag.



POS Flag Name – Name your flags according to the groups they are servicing. Normally, Tobacco products are not taxed and sold the same a General Merchandise. This will assist when assigning flags to Departments.

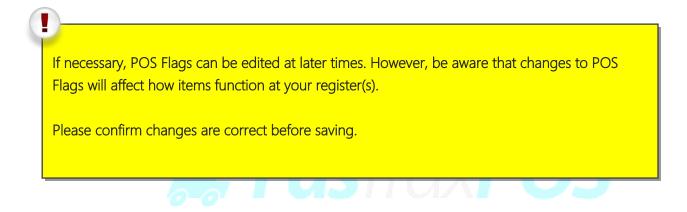
2 Tax Group – These are created at the POS/Register via the Store Setup Utility. Tax Groups apply the tax rates you setup to the items in Departments assigned particular POS Flags.

(e.g. - items in Departments assigned a flag named "Tobacco" may only apply a State Sales Tax of 8% where a general merchandise Department's items will charge a State *and* City tax rate).

- 3 Sign This marks the department as a positive or negative department. Negative department items ring at the register as a negative amount.
 - Age Required Age required to purchase items from department
- 5 Allow Food Stamps Allow Food Stamp tender

6) After confirming applicable information is entered correctly, choose the "Save" option.





Continue to "Department Groups"

Department Groups

Department Groups are a top level form of grouping for your Pricebook.

Departments can be organized into **Department Groups** assisting with the filtering functions often used in **Pricebook** editing and reports.

Multiple **Departments** can be set to groups; however, it is not necessary to setup **multiple Department Groups**. If desired, all **Departments** can be set a singular **Department Group**.



2) Choose the "Dept Groups" utility

Maint	enance	9											
Time CI	lock S	tores	Departments	Dept Groups	Tenders	POS Flags	POS Accounts	Employees	Vendors	House Accounts	Negative Check	Logins	Pricebook Zones

 This will open the "Department Groups" utility

Since **Department Groups** serve only as an organizational tool, they can be freely edited and deleted without concern for data loss.

However, at least one group must be created for all departments to use if individual groups are not necessary.

ALTERNATIVE TOBACCO
ATM SERVICE
BOTTLE DEPOSIT
BOTTLE RETURN
CIGARETTES
CLOSEDUT
DONATIONS
GASOLINE
GEN MERCHANDISE
GIFT CARD
GIFT CERTIFICATE
GROCERY ITEMS
INACTIVE
LOTTERY
MACHINE RENTAL
MISC TOBACCO
MOBILCOUPONS
NEWSPAPER/MAG
NON-ALCOHOL BEV

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4) If this is to be a new Department Group, first choose the "Add Dept Group" button.

If you wish to edit an existing group, simply highlight the applicable group from the "**Existing Department Groups**" grid and edit in the "**Department Group Details**" area.



5) Using the "Department Group Details" section, enter the applicable information for this group.



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Dept Group Number – This number is assigned by you. If you are currently utilizing this form of tiered Pricebook, you may already have a specific numbering sequence.

If not, sequential numbers will suffice.

Name – The name of the groups depends on how you currently or plan to utilize editing and reporting functions.

Notice in the example picture, the groups are generally named for the departments they contain.

 After confirming applicable information is entered correctly, choose the "Save" option.



Again, Department Groups are only utilized for their grouping function to assist you with categorization in editing your Pricebook and reporting functions.

At the very least, you must have at least one Department Group created for Department assignation.

Departments

Departments are groupings of like items to assist with hierarchal filtering, editing, reporting, and functionality.

Since Tobacco related items require different register treatment from General Merchandise, placing these items in a dedicated Department ensures the proper taxes and mandated functions apply to these items only.

Along with the parameters set by applicable POS Flags, Departments can also contain more specific parameters for Discount levels (House Account/Loyalty use).

Unlike **Department Groups**, these cannot be freely deleted. Since items are directly linked to Departments, please move items to a new Department before removal of existing assigned Department.



2) Choose the "Departments" utility

Maintenance											
Time Clock Storee	Departments	Dept Groups	Tendera	POS Flags	POS Accounts	Employees	Vendors	House Accounts	Negative Check	Logins	Pricebook Zones

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3) This will open the "Departments" utility

If this is a new install and you are using a **FasTrax** supplied starter database, you may notice there are a few Departments already setup.

These are often used Departments we have preconfigured. You are welcome to edit these to fit your particular needs.

Remember to choose the **SAVE** option to apply any changes you make.

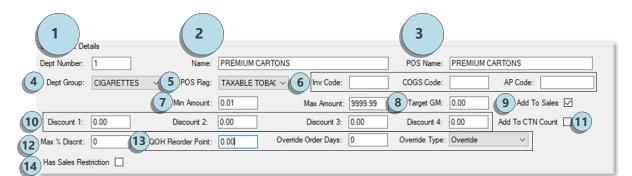
Dept #	Name	Dept Group	Product Code	POS Rag	Add To Sales	Target GM	RPCI Code	
	KRATOM	MISC TOBACCO		NUTRACEUTIC	v			
19	BUTANE	MISC TOBACCO		TOBACCO		0		
20	OTHER ACCESSORIES WRHO.	MISC TOBACCO		TOBACCO	2	0		
21	PIPES	MISC TOBACCO		TOBACCO		0		
22	PIPES RELATED	MISC TOBACCO		TOBACCO		0		
23	DOMESTIC CIGARS LTL & LG	MISC TOBACCO		TOBACCO		0		
24	GENERAL MERCHANDISE - T	GEN MERCHANDISE		Taxable		0		
25	TATTOO ACCESSORIES	GEN MERCHANDISE		Taxable		0		
28	ALTERNATIVE TOBACCO	ALTERNATIVE TOBACCO		Taxable	1	0		
30	MISC TOBACCO	MISC TOBACCO		TOBACCO	v	0		
31	DOMESTIC CIGARS	MISC TOBACCO		TOBACCO	2	0		
32	PREMIUM CIGARS	MISC TOBACCO		TOBACCO	v	0		
33	TOBACCO ACCESSORIES	MISC TOBACCO		TOBACCO	2	0		
34	LIGHTERS	MISC TOBACCO		TOBACCO	v	0		
Department De Dept Number:	[18 Na	me: KRATOM			Name: KRATOM			
Dept Group:	MISC TOBACCO V POS F	lag: NUTRACEUTICA ~	Inv Code:	COGS	S Code:	AP Code:		
	Min Amo	unt: 0.01	Max Amount: [9999.99 Targ	pet GM: 0.00	Add To !	Sales 🗹	
Discount 1:	0.00 Discount	2: 0.00	Discount 3:	0.00 Disc	ount 4: 0.00	Add To CTN C	iount 🗌	
Max % Discrit:	0 QOH Reorder P	oint: 0.00 Overrid	le Order Davs:	0 Overrid	le Type: Override	~		
Has Sales Res	atriction							
-			When Perting S	ort By Department Nar	me v			

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 If this is to be a new Department, first choose the "Add Department" button.

> If you wish to edit an existing Department, simply highlight the applicable Department from the "**Existing Departments**" grid and edit in the "**Department Details**" area.

5) Using the "Department Details" section, enter the applicable information for this department.



- 1 Dept Number Numerical designation for department. This only serves as a reference. This allows you to stay consistent if a current system requires a specific numbering system for accounting packages.
 - Name Name of Department.
 - **POS Name** Name that appears at the POS for Department sales.
- 4 <u>Dept Group</u> Department Group this Department is assigned to.
- <u>POS Flag</u> POS Flag this Department is assigned to. This decides the Taxes and other parameters the Department honors.
- Inventory Code Inv Code, COGS Code, and AP code are utilized for account exports
 - Min/Max Amount Minimum/Maximum amount per Open Department item entered at the POS.

- 8 Target GM If "Open Departments" are to be used for sales (sales directly to a Department; not via an item UPC) setting this "General Margin" will provide Departmental percentage feedback in sales reports since item cost is not utilized for an "Open Department" sale.
- Add to Sales When checked, sales are totaled and included in normal sales reports. Unchecking may be useful for store or company

transactions not intended for normal daily sales reports.

- Discounts Used for House/Loyalty accounts to receive specific Department Discounts. Each Department has four levels to enter a percentage rate for discounting item's retail price when sold.
- Add To CTN Count When utilizing the carton count limiter, this checkbox forces the POS to use the carton count rule
- 12 Max % Discount Max percent discount allowed when manually discounted on POS
- 13 Reorder Options Used to supercede reorder settings at a department level when reordering
- Has Sales Restriction Use when applying a sales restriction to department

 After confirming applicable information is entered correctly, choose the "Save" option.

Once a Department is created, they can be edited following the same steps used to create. Highlight the intended Department from the "Existing Departments" list and edit via the "Department Details" section.

Since Departments are groups of items, confirm via Item Details or Mass Updates that applicable item s are properly assigned to Departments. Refer to the <u>Pricebook Usage Guide</u> for item assignation.

Remember, if a Department is deleted, item assigned will not function properly. If a Department is to be deleted, move all currently assigned items to a new Department before deletion.

For questions



referring to sections of this document, please contact FasTrax