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.

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.

1) After logging into **Director**, choose the **Maintenance** module.
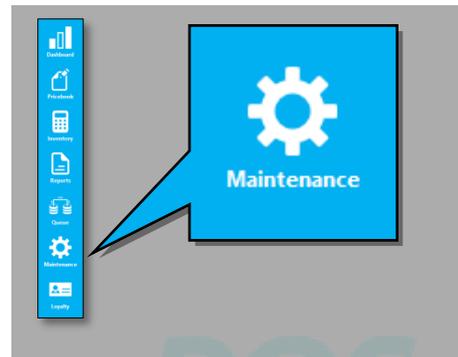
2) Once in the **Maintenance** module, choose "**POS Flags**"

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.

4) 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.

1 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.

4 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.
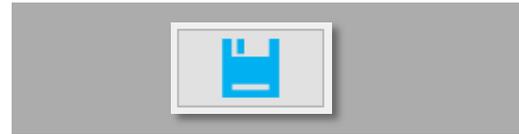
> **!**
>
> If necessary, POS Flags can be edited at later times. However, be aware that changes to POS Flags will affect how items function at your register(s).
>
> Please confirm changes are correct before saving.

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**.

1) After logging into **Director**, choose the **Maintenance** module.

2) Choose the "**Dept Groups**" utility

3) 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.
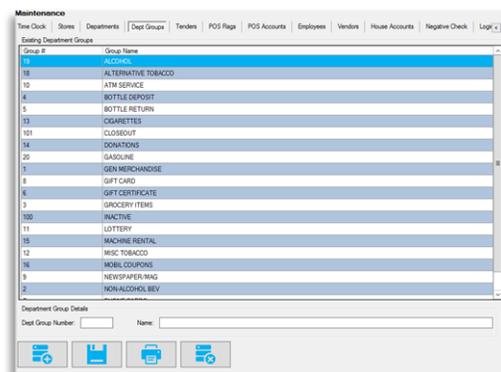
4) If this is to be a new **Department Group**, first choose the "**Add Dept Group**" button.

> 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.

(1) Dept Group Number: [   ]   **(2)** Name: [   ]

(1) **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.

(2) **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.

6) 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.

1) After logging into **Director**, choose the **Maintenance** module.

2) Choose the "**Departments**" utility
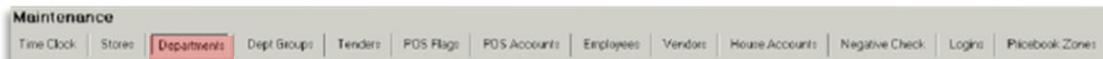
3) This will open the "**Departments**" utility

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.

4) 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.

2. **Name** – Name of Department.

3. **POS Name** – Name that appears at the POS for Department sales.

4. **Dept Group** – Department Group this Department is assigned to.

5. **POS Flag** – POS Flag this Department is assigned to. This decides the Taxes and other parameters the Department honors.

6. **Inventory Code** – Inv Code, COGS Code, and AP code are utilized for account exports

7. **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.

9. **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.

10. **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.

11. **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

14. **Has Sales Restriction** – Use when applying a sales restriction to department

6) 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 Pricebook Usage Guide 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 Support