

Categories Help & Info Sheet

Categories can be used to define groups of stock. They are especially useful for website applications where they can be used as menu items for the location of product information.

The setup for Categories in Chreos is in "Stock | Stock maintenance | Stock lookups" - select Categories. See (Fig1.).

Adding Finding and Merging Categories

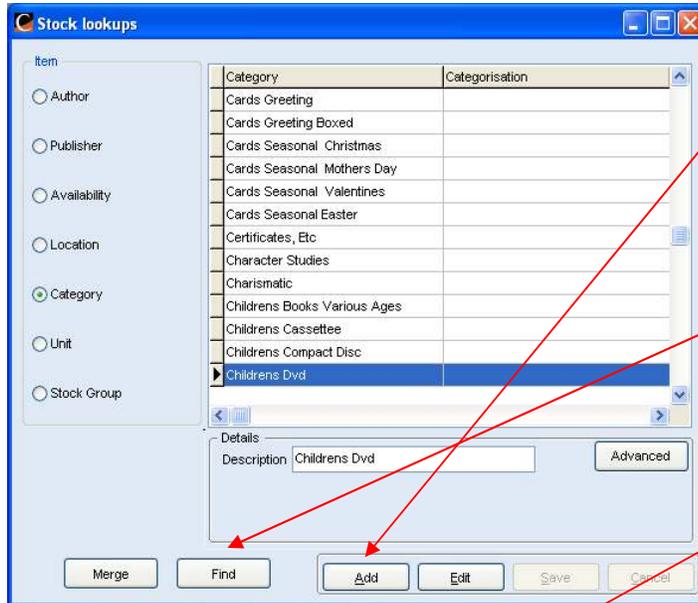


Fig 1. Stock Lookups Screen

To add a category click [Add] and enter the name in the Description area. Click [Save].

To Find a category click the [Find] button and the 'Find' panel (Fig 1a.) will display. Enter the 'Starting with' text for the search and the result will be highlighted on the grid automatically as the text is entered.

Click the [End Find] button to end the search and remove the "Find" panel.

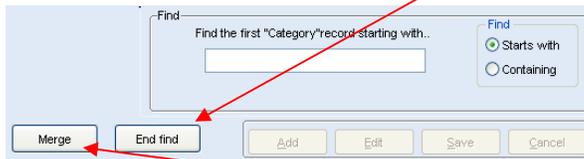


Fig 1a. Find Panel Screen

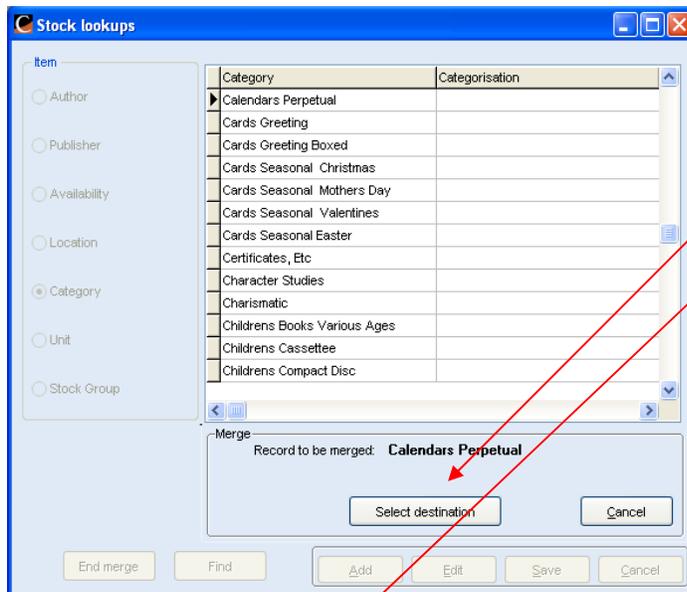


Fig 2. Merge Category Screen

To Merge a category select the category you want to merge and click [Merge] and the 'Merge' panel (Fig 2.) will display. Click [Select destination] and select the category to merge to. Click [End merge] to confirm the destination category. Click [Process] to go ahead and merge the category or [Cancel] to cancel the merge. See (Fig 2b.).

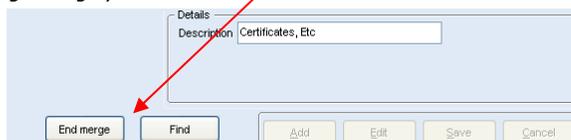


Fig 2a. End Merge Category Screen

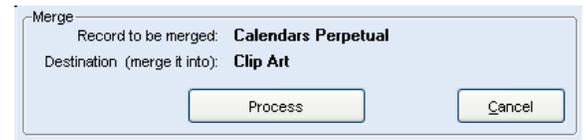


Fig 2b. Process Merge Screen

Managing Categories

Clicking the [Advanced] button allows you to manage the categories by building on to or editing the category tree. See (Fig 3). Any changes or additions made will show up in the grid under the "Categorisation" column in the Stock Lookups Screen (Fig 1.).

The Manage Categories screen (Fig 3.) can also be accessed in Stock Management on the Item detail tab by right clicking in the categories field and selecting 'Add new Category record'.

Base Categories

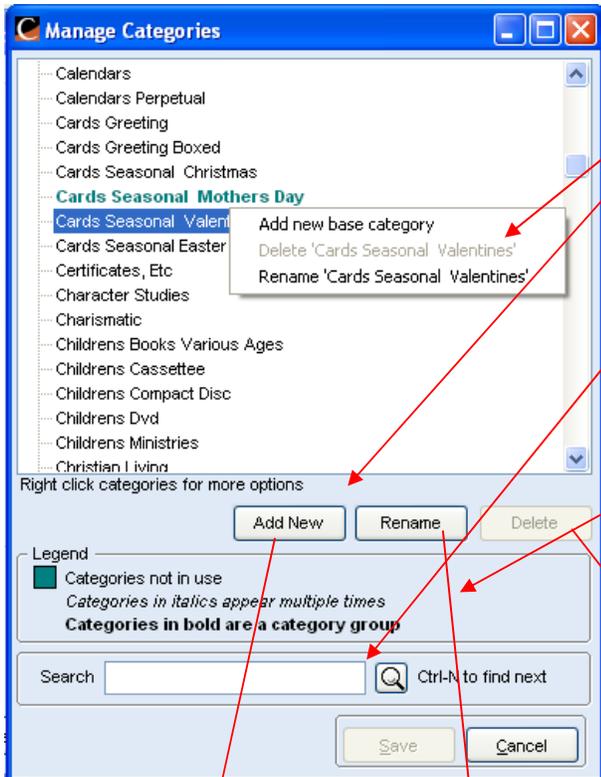


Fig 3. Manage Categories Screen

To add a new base, rename or delete a category click on the buttons or right click on the existing base category. See (Fig 3a.) (Fig 3b.) & (Fig3c) for the screens that these options open.

You can not delete a category that is in use.

To search for a category enter the information into the Search box and click enter or [Q] to initiate the search. Hit <Ctrl> & <N> keys to find the next match of the information entered.

The Legend tells you the status of the present categories.



Fig 3a. Add New Base Screen



Fig 3b. Rename Category Screen



Fig 3c. Delete Category screen

Note: When adding a new base category it can not have the same name as an existing base category. It can have the same name as a category group and will display in italics. See the Legend in (Fig 3.).

Managing Categories cont.

Sub Categories

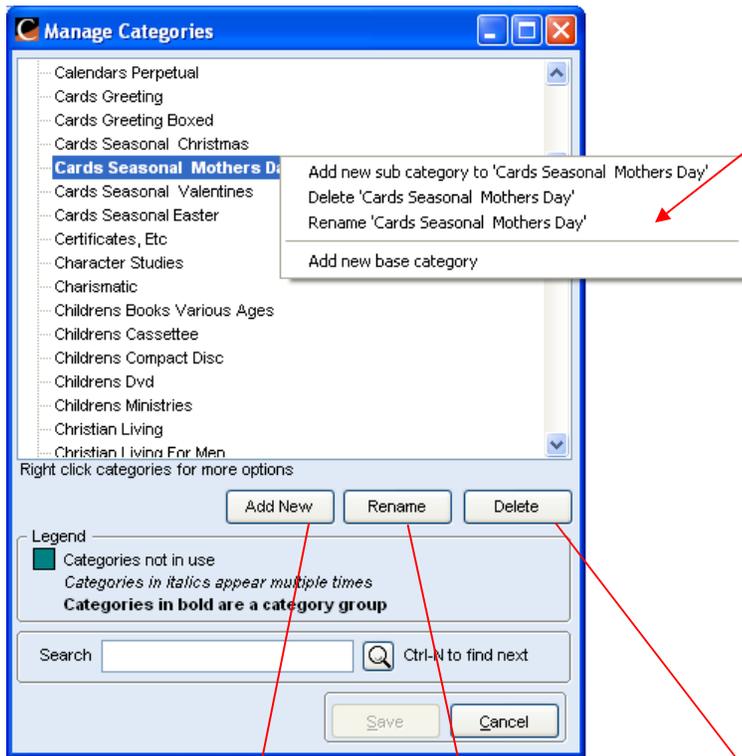


Fig 4. Manage Categories Screen

To add, rename or delete a sub category, or add a new base category, click on the buttons or right click on the category group (Fig 4.). See (Fig 4a.), (Fig 4b.) & (Fig 4c.) for the screens that these options open.

Sub categories can only be added to a category group which will be displayed in bold when a sub category has been added. See (Fig 5.).



Fig 4a. Add New Sub Category Screen



Fig 4b Rename Category Screen



Fig 4c. Delete Category screen

Sub Categories cont.

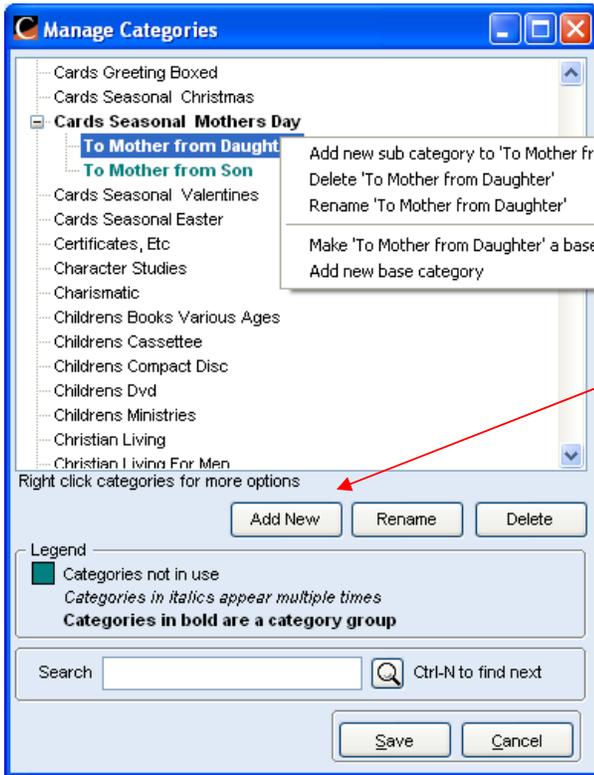


Fig 5. Managing Sub Categories

A new base category and Sub categories can be continually added, renamed or deleted to or from category groups and to or from the sub categories within those groups (Fig 5), by right clicking on the sub category or by using the buttons.

By clicking [Add New] when a sub category is highlighted it will only add a sub category.

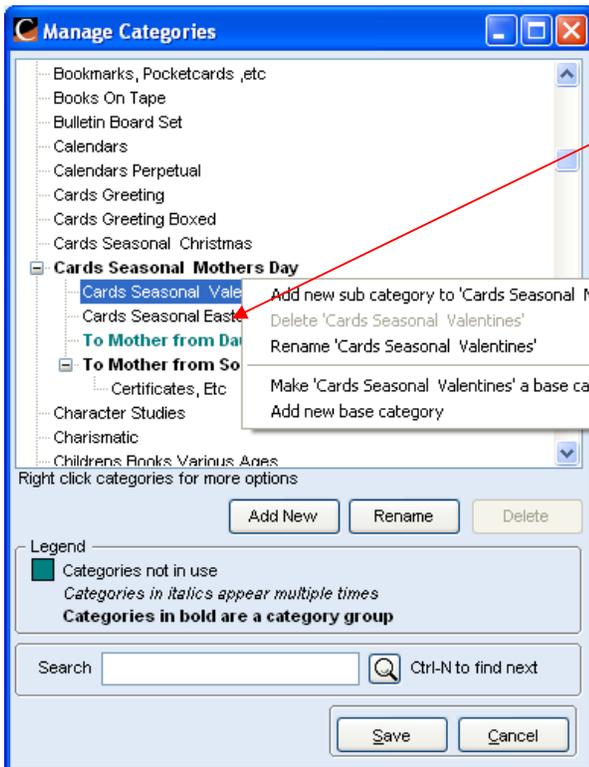


Fig 6. Managing Sub Categories

Base categories can be dragged into and out of category groups and sub categories. This can enable you to have levels of categories.

By right clicking on a category in use that is in a group or sub category you can return it to a base category.