

Materials Control

Master Data Categories



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Introduction:

In order to be able to read this document correctly please load the KEYCAPS font in your word-processing application. The necessary files can be found on the FTP server in the documentation directory.

This document will describe the setup and use of the categories.
This function is available since version 8.4.00 / 10.01

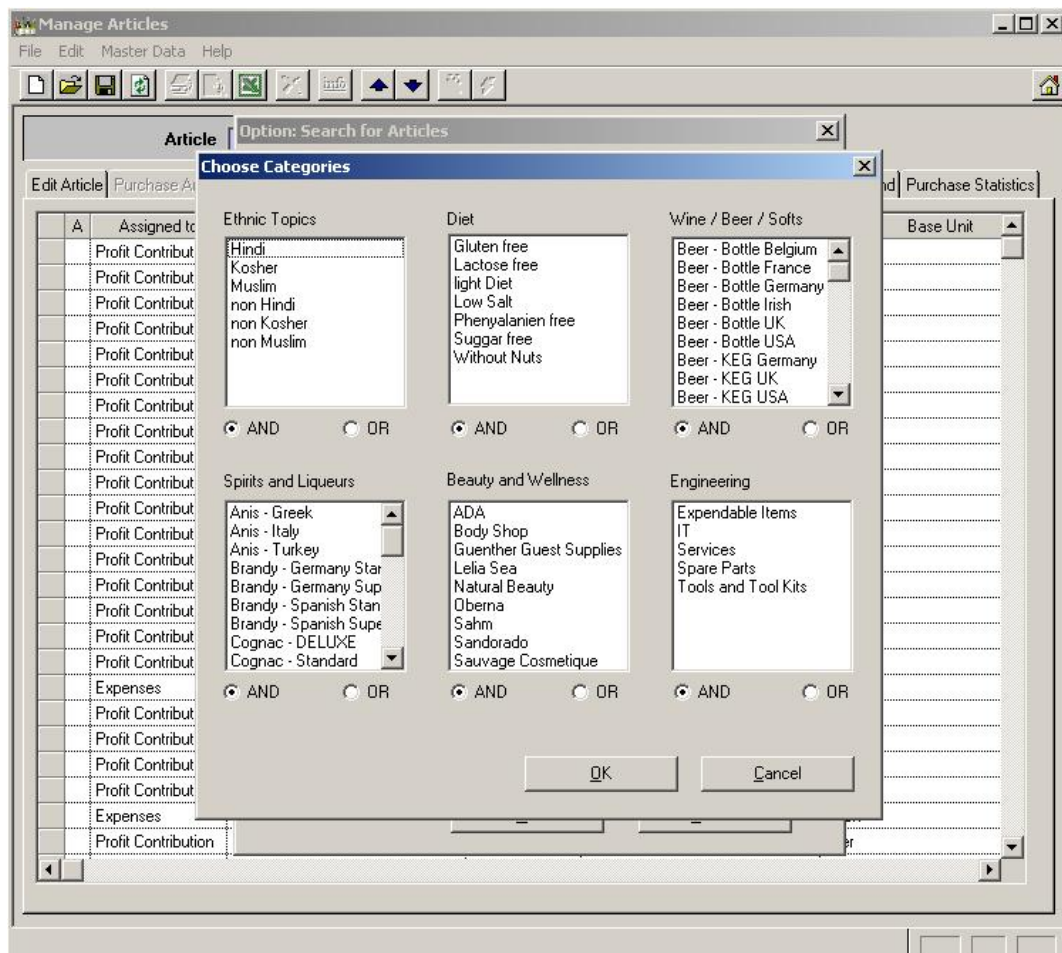
This version offers the use of categories for:

- Stock Articles
- Suppliers
- Recipes

It is planned to implement the use of categories in future versions for:

- Sales Assortments (Menu Planning)

These categories can be used for filtering / searching in the overview dialogs.

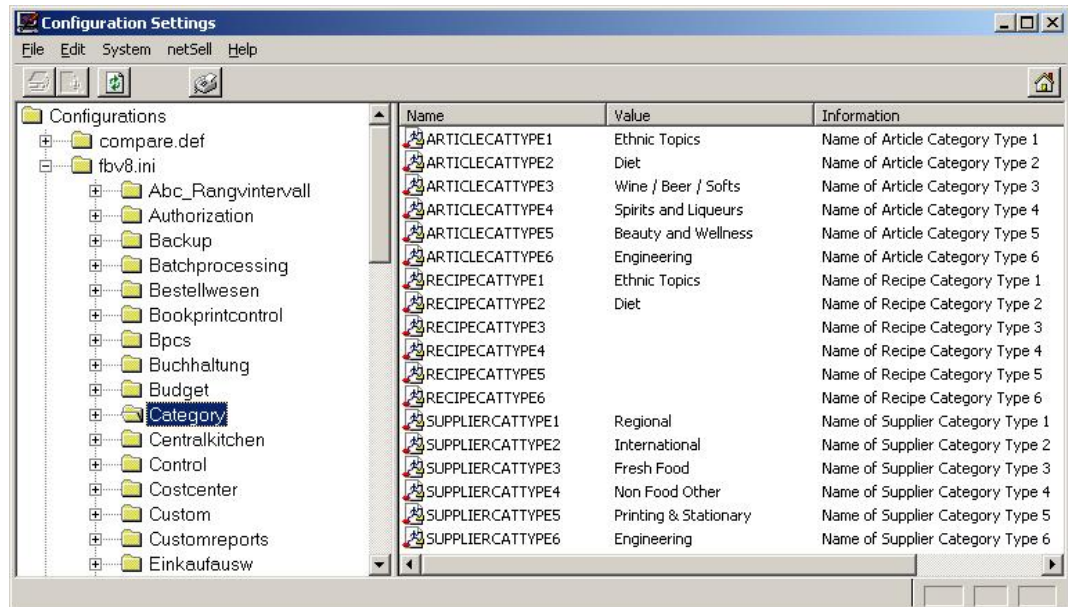


I. CONFIGURATION:

1) **SYSTEM > CONFIGURATION**

In the configuration the names of different category – groups can be defined.

Goto System > Configurations > FBV8.INI > Category:



ARTICLECATTYPE1 – 6

- Here the names of the category groups for stock articles can be defined. Up to 6 groups are possible.

RECIPECATTYPE1 – 6

- Here the names of the category groups for recipes can be defined. Up to 6 groups are possible.

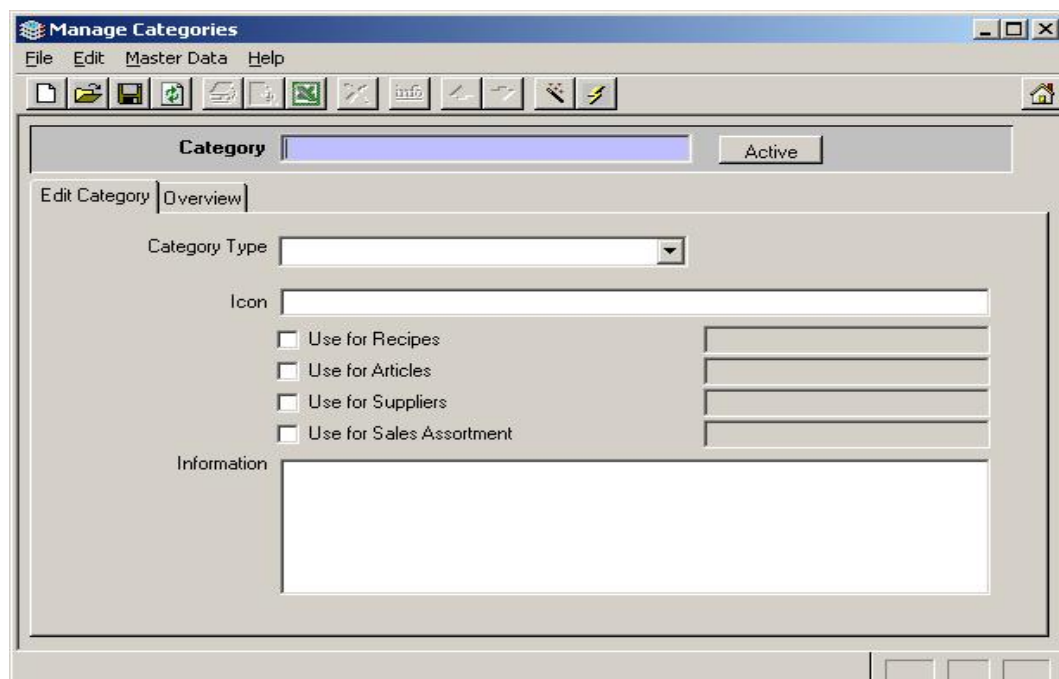
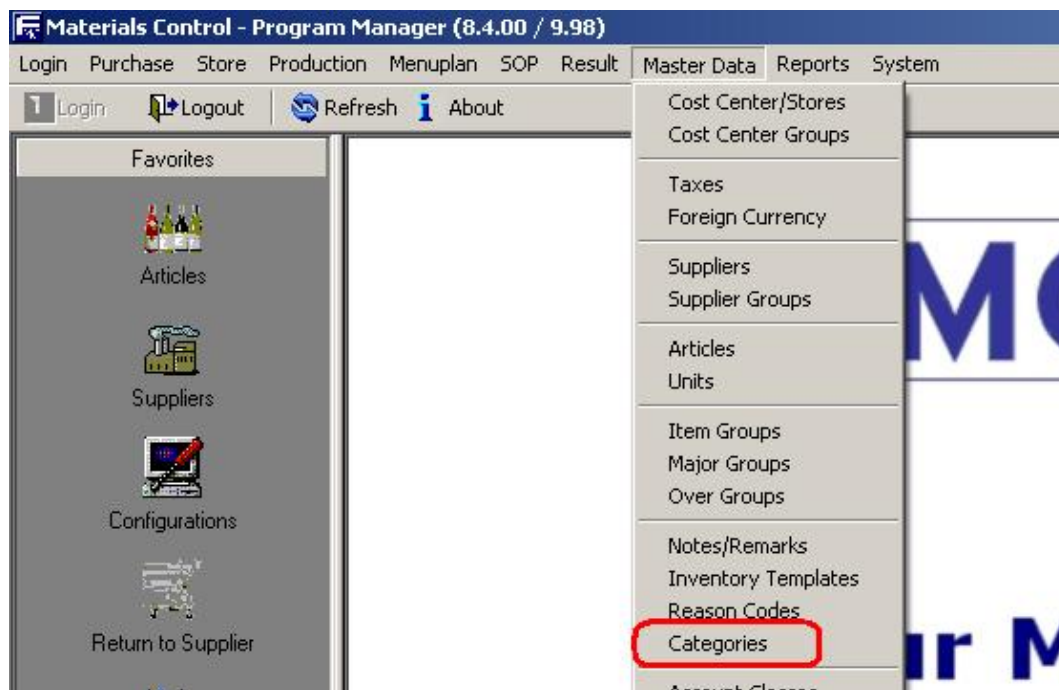
SUPPLIERCATTYPE1 – 6

- Here the names of the category groups for suppliers can be defined. Up to 6 groups are possible.

II. DEFINITION:

2) MASTER DATA > CATEGORIES

In the section Master Data the user can find the module to define the different categories.
Goto Master Data > Categories:



Definition of the screen:

Category Type:

From this drop down box the user can select the type / group for the category he wants to create:

Category Type

Icon

Category Type 1
Category Type 2
Category Type 3
Category Type 4
Category Type 5
Category Type 6

☐ Use for Suppliers

Icon: for future use

Use for....:

After the selection of the type / group the predefined names will be listed per category.

Category Type

Icon

☐ Use for Recipes
☐ Use for Articles
☐ Use for Suppliers
☐ Use for Sales Assortment

Category Type 3
Wine / Beer / Softs
Fresh Food
Category Type 3

The user can now mark the check boxes in order to define where the category should be available.

Use for Articles: Categories for articles could be the type, the country of origin, some kind of quality specification, etc.

Use for Suppliers: Categories for suppliers could be a region, a branch or any other specific topics the users may search for.

There could be several categories valid for articles and supplier, so we defined the function in a way that one category could be used for both types.

Information:

Here the user can save some additional information for this category.

Examples for categories:

Article Categories:

Type / Group :	Category :
Ethnic Topics	Hindi
Ethnic Topics	Muslim
Ethnic Topics	Kosher
Ethnic Topics	Non Hindi
Ethnic Topics	Non Muslim
Ethnic Topics	Non Kosher
Diet	Lactose free
Diet	Phenylalanine free
Diet	Sugar free
Diet	Gluten free
Diet	Without nuts
Diet	Light diet
Diet	Low Salt
Wine / Beer / Softs	Wine - Germany - Mosel / Saar / Ruwer
Wine / Beer / Softs	Wine - Germany – Rheingau
Wine / Beer / Softs	Wine - Germany – Baden
Wine / Beer / Softs	Wine - Germany – Württemberg
Wine / Beer / Softs	Wine - Germany – Ahr
Wine / Beer / Softs	Wine - France – Provence
Wine / Beer / Softs	Wine - France – Champagne
Wine / Beer / Softs	Wine - France – Loire
Wine / Beer / Softs	Wine - France – Rhone
Wine / Beer / Softs	Wine - Sparkling Germany
Wine / Beer / Softs	Wine - Sparkling Italy
Wine / Beer / Softs	Wine - Sparkling France
Spirits and Liqueurs	Whisky – Irish
Spirits and Liqueurs	Whisky – Scotch
Spirits and Liqueurs	Whiskey – Bourbon
Spirits and Liqueurs	Whiskey – Tennessee
Spirits and Liqueurs	Whisky - Malt 12years
Spirits and Liqueurs	Whisky - Malt 6years
Spirits and Liqueurs	Cognac – Standard
Spirits and Liqueurs	Cognac – VS
Spirits and Liqueurs	Cognac – VSOP
Spirits and Liqueurs	Cognac – XO
Spirits and Liqueurs	Cognac – DELUXE
Engineering	Tools and Tool Kits
Engineering	Spare Parts
Engineering	Services
Engineering	IT
Engineering	Expendable Items

Supplier Categories:

Type / Group :	Category :
Regional	Categories could be the different regions in the country
International	Categories could be the countries where these suppliers are located
Fresh Food	Categories could be the articles types delivered by this supplier
Fresh Food	Vegetables
Fresh Food	Exotic Fruits
Fresh Food	Meat Lamb
Fresh Food	Meat Game
Fresh Food	Meat Beef
Fresh Food	Meat Veal
Fresh Food	Meat Poultry
Engineering	Tools and Tool Kits
Engineering	Spare Parts
Engineering	Services
Engineering	IT
Engineering	Expendable Items

Recipe Categories:

Type / Group :	Category :
Courses	Appetizers
Courses	Soups
Courses	Main Dishes
Courses	Desserts
Food General	Gardemanger - Base
Food General	Entremetier – Base
Food General	Saucier – Base
Food General	Poissonier – Base
Food General	Pâtissier - Base
Ethnic	Kosher
Ethnic	Hindi
Ethnic	Muslim
Ethnic	

Overview:

This is the usual overview function. Click on the yellow “open folder” to see the selection dialog:

Search Category

Category

Category Type

☐ Use for Recipes

☒ Use for Articles

☐ Use for Suppliers

☐ Use for Sales Assortment

OK Cancel

Category:

- Here the user can type the name of the category to search for. (Case-sensitive!)

Category Type:

- Here the user can select a specific category type / group for filtering

Use for...:

- Here the user can select e.g. to show categories for articles only

Click on OK to confirm and the categories will be listed as defined:

Manage Categories

File Edit Master Data Help

Category:

Edit Category:

A	Category	Category Type	Icon
	Lactose free	Category Type 2	
	Phenylalanin free	Category Type 2	
	Suggar free	Category Type 2	
	Gluten free	Category Type 2	
	Without Nuts	Category Type 2	
	light Diet	Category Type 2	
	Low Salt	Category Type 2	

By doubleclick the user can edit the category.

Please note that the category type cannot be changed anymore once the category was saved.

III. HOW TO ASSIGN?:

3) ARTICLES

Goto Master Data > Articles > select an article > click on the tab “Categories”:

The screenshot shows the 'Manage Articles' window with the 'Categories' tab selected. The article 'Remy Martin Louis XIII' is active. The window is divided into several sections for assigning categories:

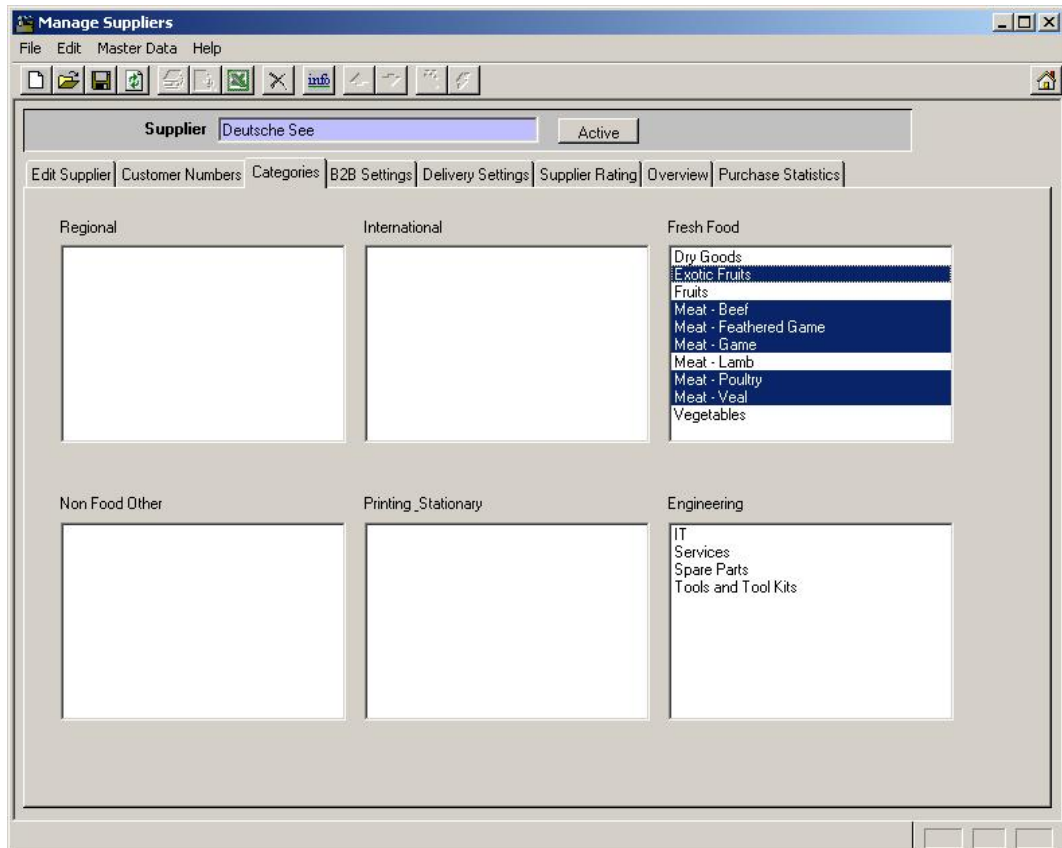
- Ethnic Topics:** Hindi, Kosher, Muslim, non Hindi, non Kosher, non Muslim (selected).
- Diet:** Gluten free, Lactose free (selected), light Diet, Low Salt, Phenylalanine free, Sugar free, Without Nuts.
- Wine / Beer / Softs:** Beer - Bottle UK, Beer - Bottle USA, Beer - KEG Germany, Beer - KEG UK, Beer - KEG USA, Juice - Grannini Large, Juice - Grannini small, Meat - Pork, Wine - France - Alsace, Wine - France - Bordeaux, Wine - France - Burgund.
- Spirits and Liqueurs:** Anis - Greek, Anis - Italy, Anis - Turkey, Brandy - Germany Standard, Brandy - Germany Superior, Brandy - Spanish Standard, Brandy - Spanish Superior, Cognac - DELUXE (selected), Cognac - Standard, Cognac - VS, Cognac - VSOP.
- Beauty and Wellness:** ADA, Body Shop, Guenther Guest Supplies, Lelia Sea, Natural Beauty, Oberma, Sahm, Sandorado, Sauvage Cosmetique.
- Engineering:** Expendable Items, IT, Services, Spare Parts, Tools and Tool Kits.

By using the mouse one or more categories per section can be marked now.

Click on the “save” icon to confirm the selection.

4) SUPPLIERS

Goto Master Data > Articles > select a supplier > click on the tab "Categories":

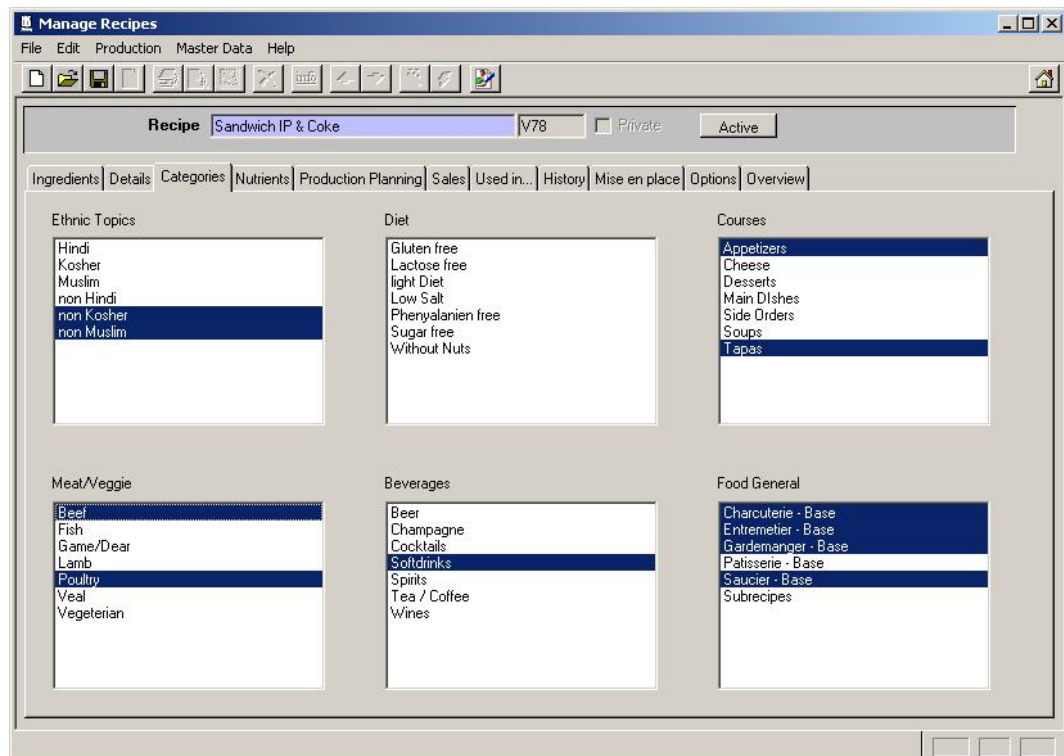


By using the mouse one or more categories per section can be marked now.

Click on the "save" icon to confirm the selection.

5) RECIPES

Goto Production > Recipes > select a recipe > click on the tab “Categories”:



By using the mouse one or more categories per section can be marked now.


Click on the “save” icon to confirm the selection.

IV. HOW TO USE?:

6) ARTICLES

Goto Master Data > Articles > click on the "open Folder" icon:

Here the user can find the new filter function.

Click on the  button and the filter dialog will come up:

The system will offer here the category types and the related criterias. Using the mouse one or more offered criterias can be marked and / or unmarked. Using the radio buttons "AND" / "OR" / "NOT" these criterias can be combined as required.


Click on "OK" to get the result.

In the used example above the system would show now all articles that have the category „Sugar free“ and „Wine – Sparkling Germany“ assigned.

7) SUPPLIERS

Goto Master Data > Suppliers > click on the “open Folder” icon:

Here the user can find the new filter function.

Click on the  button and the filter dialog will come up:

The system will offer here the category types / groups and the related criterias. Using the mouse one or more offered criterias can be marked and / or unmarked. Using the radio buttons “AND” / “OR” / “NOT” these criterias can be combined as required.


Click on “OK” to get the result.

In the used example above the system would show now all suppliers which have the category “Meat - Beef” **or** “Spare Parts” assigned.

8) RECIPES

Goto Production > Recipes > click on the “open Folder” icon:

Here the user can find the new filter function.

Click on the  button and the filter dialog will come up:

The system will offer here the category types / groups and the related criterias. Using the mouse one or more offered criterias can be marked and / or unmarked. Using the radio buttons “AND” / “OR” / “NOT” these criterias can be combined as required.

Click on “OK” to get the result.

In the used example above the system would show now all recipes which have the category “Phenylalanin free” **and** “Main Dishes” **and** “Poultry” **and** “Gardemanger - Base” **and** “Saucier - Base” assigned.