How to Create Categories

Rose 3.0 · Categories

In each screenshot, the **yellow boxes** show what to click. Numbers give the order.

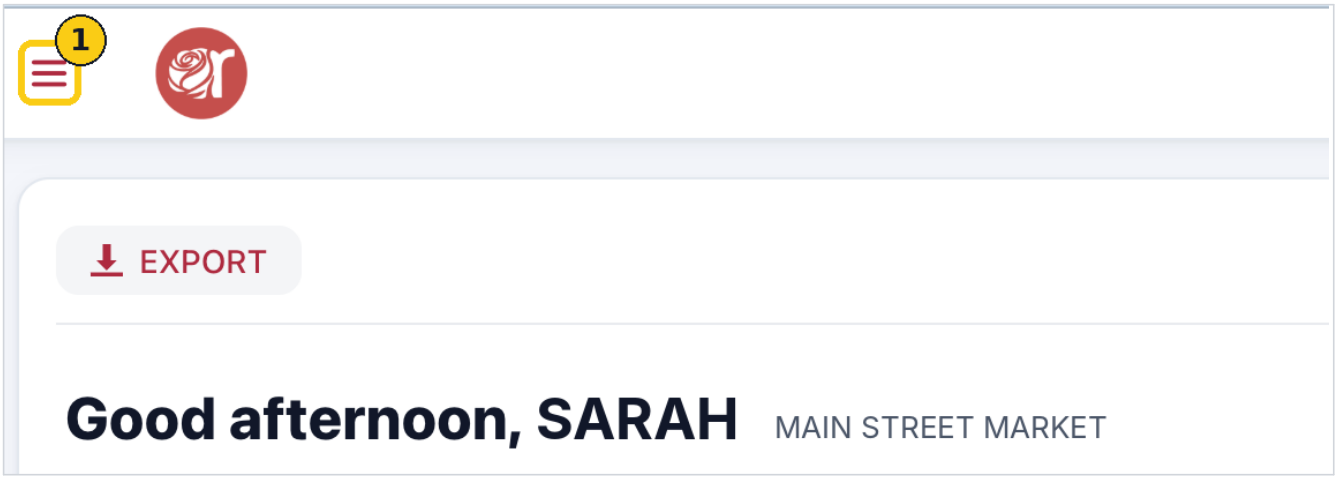
Overview

Categories group your items (for example, Home Decor or Seasonal). Each category sets how long its items stay on the shelf, which taxes new items start with, and a price guide for staff. Rose sends each category to Square, so the same categories show on your Square items.

Where to find it: Dashboard › menu (☰) › **Categories** › **CREATE**. You need the Categories module right (User Maintenance).

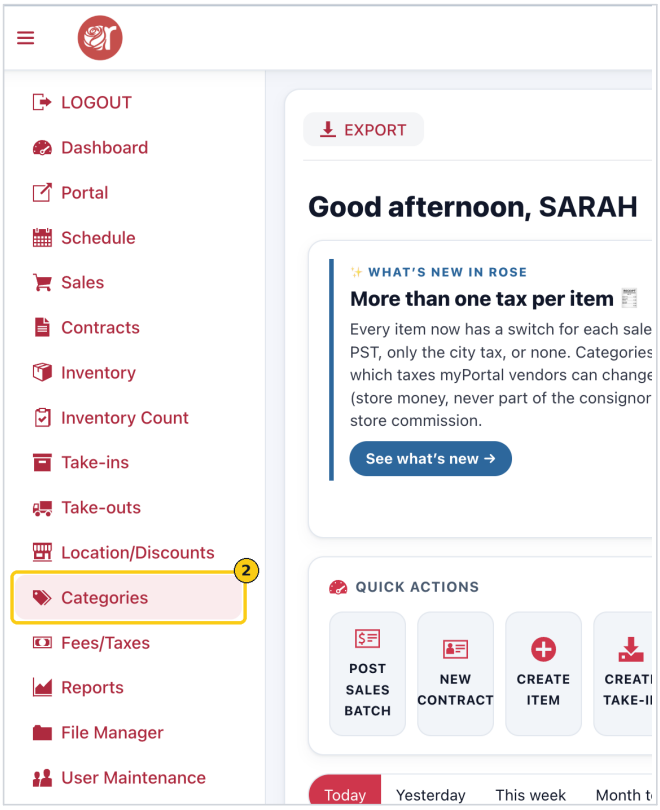
Step 1: Open Categories

1 On your Dashboard, click the menu icon (☰) in the top-left corner.



Open the menu from the Dashboard.

2 Click **Categories**.

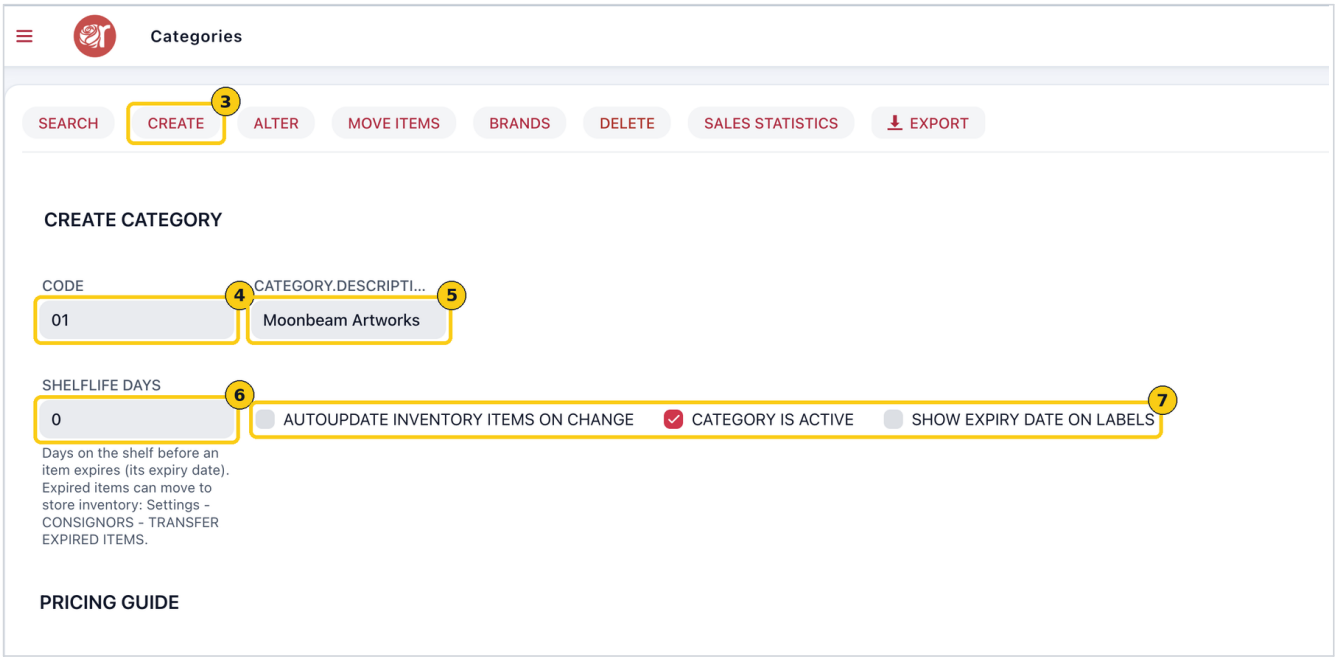


Click Categories.

Step 2: Enter the category details

1. Click **CREATE**.
2. Enter a short **CODE** for the category (for example, 01 or HD).
3. Enter the **CATEGORY.DESCRIPTION**: the name staff and shoppers see, such as Moonbeam Artworks.
4. Enter **SHELFLIFE DAYS**: how many days items stay on the shelf before they expire. Enter **0** for items that never expire.
5. Set the options:

Option	What it does
AUTOUPDATE INVENTORY ITEMS ON CHANGE	When you change this category later, the change is applied to its existing items too
CATEGORY IS ACTIVE	The category can be picked for new items (ticked for new categories)
SHOW EXPIRY DATE ON LABELS	Prints each item's expiry date on its label



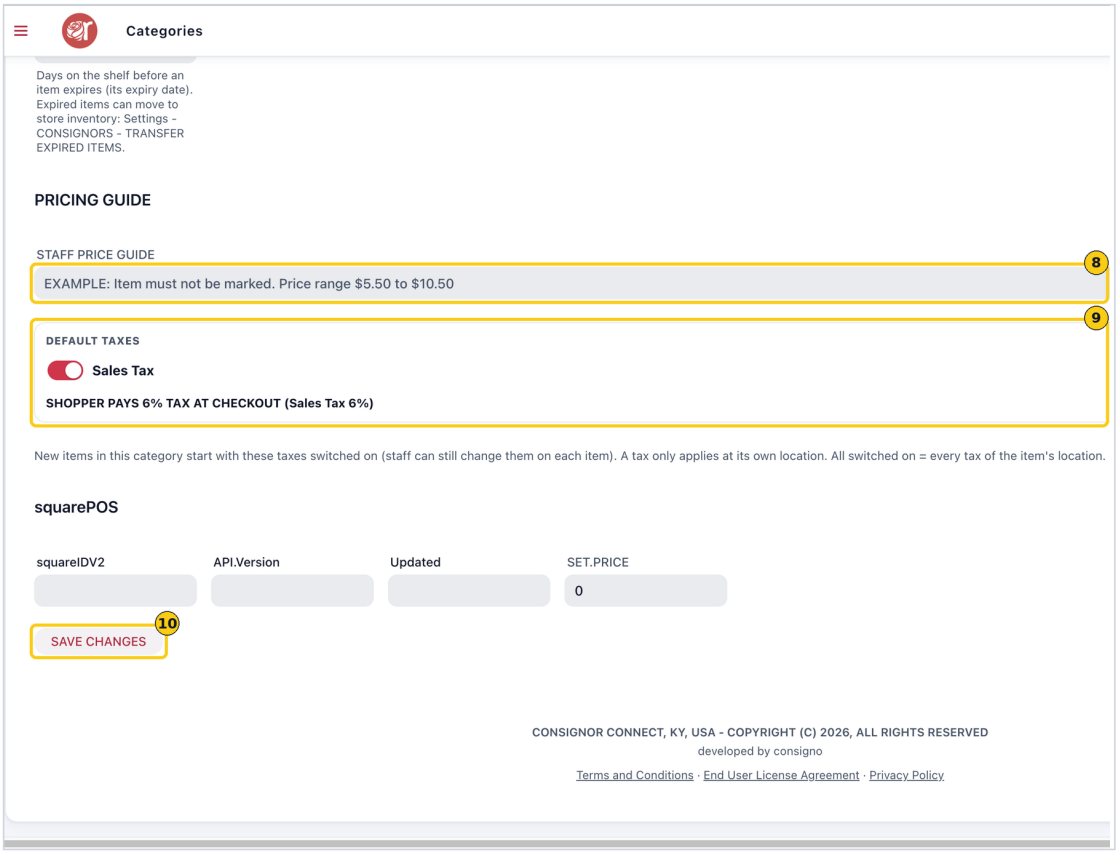
Click CREATE (3), then fill in the code (4), name (5), shelf life (6) and options (7).

Step 3: Price guide and taxes

6 Add a **STAFF PRICE GUIDE** if you want one, for example Item must not be marked. Price range $5.50 to $10.50. Staff see it when pricing items in this category.

7 Under **DEFAULT TAXES**, switch on each tax that new items in this category should start with. The line underneath shows what the shopper pays, for example SHOPPER PAYS 6% TAX AT CHECKOUT. Staff can still change taxes on each item.

8 Click **SAVE CHANGES**.



Add a price guide (8), choose default taxes (9), then click SAVE CHANGES (10).

A tax only applies at its own location. With every tax switched on, an item gets all the taxes of its location. The **squarePOS** fields are filled in by Square; you don't need to change them.

Step 4: Check the new category

The category appears in the **CATEGORIES** list. While Rose sends it to Square, the **ACTION** column shows **UPDATING IN SQUARE**. Once it's done, the category is ready to use on items and take-ins.



The new category in the list, being sent to Square.

To change a category later, click the edit icon in its **ALTER** column.

FAQ

What does shelf life 0 mean?

Items in the category never expire, so they're never marked down by time or moved to store inventory as expired.

Will changing a category change items I already have?

Only if AUTOUPDATE INVENTORY ITEMS ON CHANGE is ticked. Otherwise the change applies to new items only.

Where do expired items go?

They can move to store inventory automatically. Set it in Administration › Settings › CONSIGNORS › TRANSFER EXPIRED ITEMS.