CRUNCHTIME! ENTERPRISE MANAGER

Assign Categories

Setup Guide

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Overview

This guide will prepare you to assign your Products and Recipes to Categories that you configure. Categories are primarily used to group like Products and Recipes together for reporting purposes and are a required setup piece in creating your CrunchTime! Database.

Be sure to grab the latest version of this document here:

https://links.crunchtime.com/EMSG-AssignCategories

OR by scanning the QR code to the left.

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Assign Categories

What are Categories?

Categories are assignments that are made in order to group like Products and Recipes together when filtering in reports. CrunchTime! provides you with the option to assign three different levels of Categories that allow you to see both broad and more granular reporting. The levels are as follows:

1. Category (Broad)
2. Subcategory (Granular)
3. Microcategory (More Granular)

Warning: If you choose to use a Sub or Microcategory for one item, you must for all items.

You might be thinking "But I really only want to see detailed Microcategory reporting for my high cost Products" – Don't fret, you can just copy the subcategory text into the Microcategory field.

Other Requirements

A General Ledger Account must be linked to each Category combination. It can be linked at either the Category or Subcategory level, but needs to remain consistent throughout.

How should my Categories differ?

Products and Prep Recipes should be linked to a Category that you associate with cost items. These Categories should link back to your Cost of Goods Sold GLs.

Cost of Goods Category Setup

General Ledger	Category	Subcategory	Microcategory	Company Product
5200 Food COGS	Food	Dairy	Cheese	Cheese, Cheddar
5200 Food COGS	Food	Dairy	Other Dairy	Milk 2%
5200 Food COGS	Food	Produce	Produce	Lettuce, Romaine
5200 Food COGS	Food	Protein	Poultry	Chicken, Breast

POS Recipes should be linked to Sales GLs and Sales Categories.

Sales Category Setup

General Ledger	Category	Subcategory	Microcategory	Recipe Name
4200 Food Sales	Food Sales	Appetizers	Appetizers	Nachos
4200 Food Sales	Food Sales	Soups & Salads	Soups	Clam Chowder
4200 Food Sales	Food Sales	Soups & Salads	Salads	Garden Salad
4200 Food Sales	Food Sales	Entrees	Entrees	Chicken Sandwich
4000 Bev Sales	Wine Sales	By the Bottle	White Wine	KJ Chardonnay Btl
4000 Bev Sales	Wine Sales	By the Glass	White Wine	KJ Chardonnay Gls
4000 Bev Sales	Beer Sales	Draft Beer	Domestic	Budweiser

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