

Table of Contents

Category Maintenance	3
Navigation	4
Buttons	4
How to use Properties	5
Fields	7
Category	7
Description	7
Category Image	8
Main Navigation	8
Enabled	8
Secondary Grid	8
Fields	9
Item Code	9
Description	9
Buttons	10

Category Maintenance

A Category is a grouping of products. Sage 100, **Inventory Maintenance** has four user defined categories that allow a grouping of products. The Sage e-Business Manager module introduced **Category Maintenance** and **Category Tree Maintenance**. This allowed the website to have the ability to group products in multiple categories. A single item could be in one or many different categories. Sage Data Exchange can import this information if it exists from an install of e-Business or it can be entered in to the Sage Data Exchange **Category Maintenance**. To access the the maintenance field go to **Application | Setup | Category Maintenance**.

The screenshot shows the 'Category Maintenance' window in Sage Data Exchange. The window has a blue title bar with the text 'Category Maintenance' and standard Windows window controls (minimize, maximize, close). Below the title bar is a header area with a database icon and the text 'Category Maintenance'. The main area contains a form with the following fields:

- Category**: A text input field with a magnifying glass icon.
- Description**: A text input field.
- Category Image**: A text input field.
- Main Navigation**: A checkbox.
- Enabled**: A checkbox.

Below the form is a table with two columns: 'Item Code' and 'Description'. The table is currently empty. To the right of the table is a vertical toolbar with icons for adding, deleting, and moving items. At the bottom of the window is a status bar with icons for printing, saving, and other functions.

Sage Data Exchange - Category Maintenance

Navigation

The screen has four primary buttons. There is a directional button that has arrows pointing up, down, left and right. The up arrow will go to the first record in the table. The down arrow will go to the last record in the table. The left arrow will go to the previous record while the right arrow will go to the next record in the table. In the middle is a Plus sign and when that is clicked, the Category value can be modified.



Other buttons on the screen are Delete, to delete the current record.



The cancel button which will not save the changes to the current record and will take you back to a blank

Category Maintenance screen with no Category value entered.



The Save button which will save the changes to the current record and will take you back to a blank

Category Maintenance screen with no Category value entered.



Buttons

There are three buttons on the Category Maintenance Screen. One is the Print button that will print a list

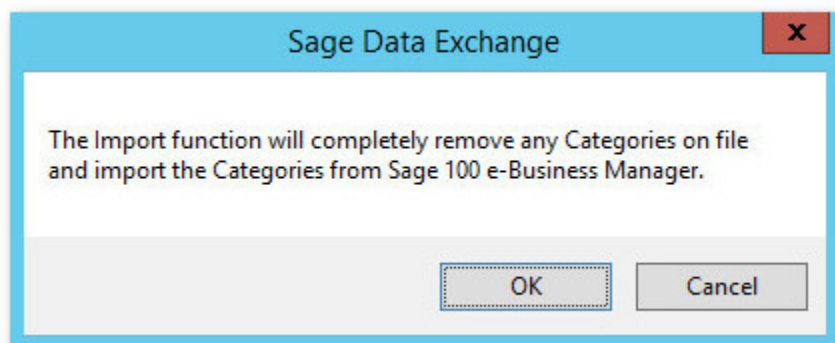
of the Category information from the screen.



The next button is to Import Sage 100 e-Business Categories.




When the button is clicked a message box will appear warning that the import function will completely remove any Categories that exist in Sage Data Exchange.




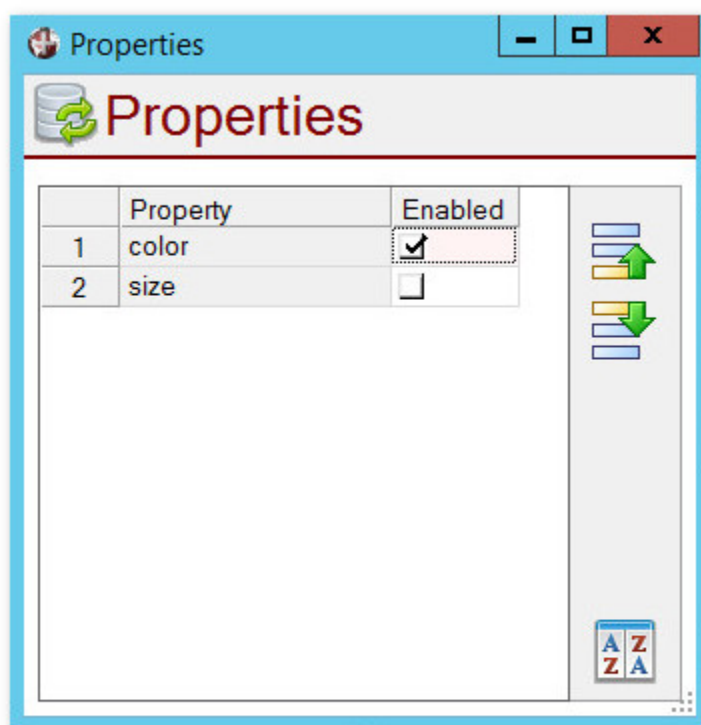
Click **OK** to import Categories from the existing e-Business setup or click *Cancel* to close out of the

import function without any changes to the Sage Data Exchange Categories.

When done it will return to the **Category Maintenance** screen.

The import Sage 100 e-Business Categories button will only be available if there is no value in the Category field. If a Category is selected the icon will be disabled. 

The last button is the Assign Properties.  The properties button will display a list of fields that are set to be a *Property* field in **Return Maintenance** for the specific *Resource* set to *Products*. When a *Product* Resource has a *Column Name* checked to be a *Property*, the *Column Name* or *Alias* is shown in the list of Properties.



Sage Data Exchange - Category Maintenance - Properties

How to use Properties

Properties is a way to have a sub grouping value. This can refer to the custom categories group in Item Maintenance. When a property field is identified, the system will read through all the items to create a list of the properties values that are available. Using the Property screen, the category can now determine which properties would be used to list the values for the items. See the **API Resource - Categories**

To enable the property to return the values available for a Category, click on the box in the Enabled

column. The list of enabled Properties will be returned in the order shown on the **Properties** screen.

- To move the row up by one row, select the row to move and click on the Move Up button.
- To move the row down by one row, select the row to move and click on the Move Down button.

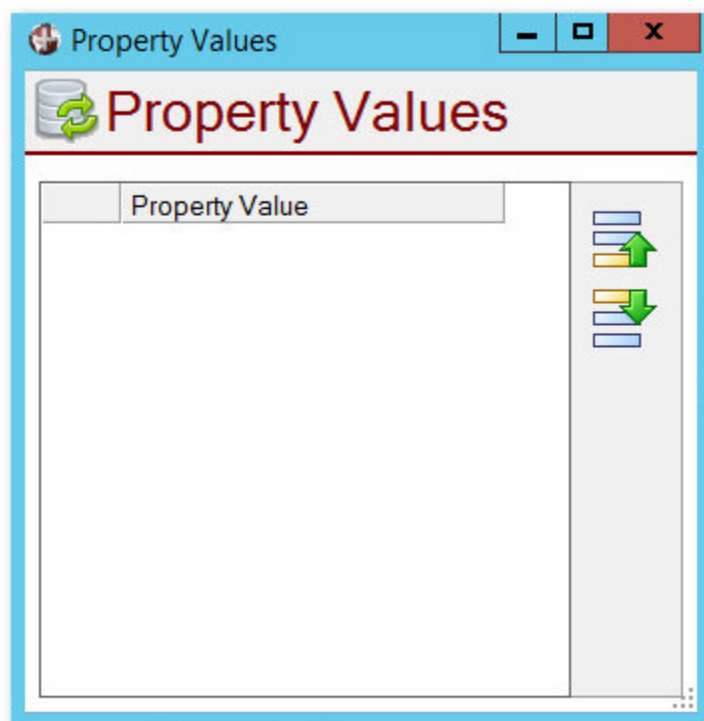


To Add or Remove available properties, use **Return Maintenance** and check or uncheck the fields that will be listed as a property.

Each Property that is returned for the Category will also have an array of values found for that *Column Name*. This list can be seen and the order of what is returned is maintained by highlighting the row of the



Property to view and click on the **Properties Values** button.



Sage Data Exchange - Category Maintenance -
Property Values


- To move the row up by one row, select the row to move and click on the Move Up button.
- To move the row down by one row, select the row to move and click on the Move Down button.

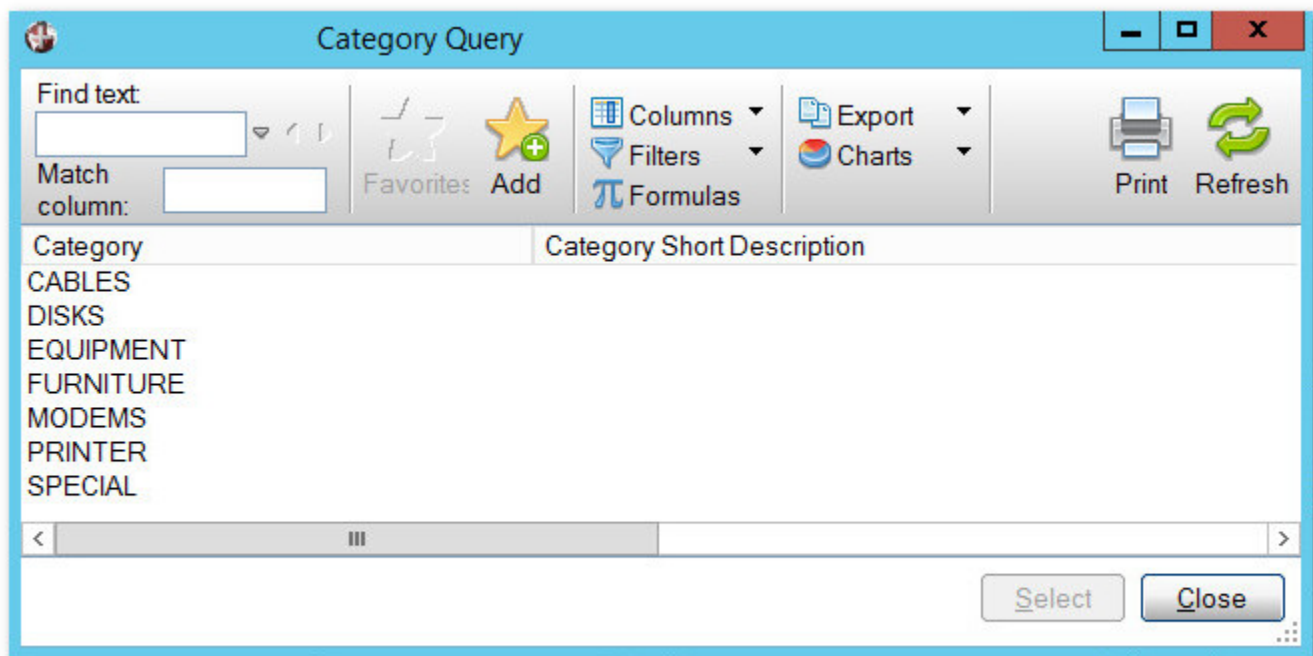


Fields

The following are the fields available on the **Category Maintenance** Screen.

Category

This is the Category name. It is case sensitive, meaning CASE is different than case. Use the Lookup button  to view a list of existing Categories. The Lookup button is only available if the field Category is blank.



Sage Data Exchange - Category Query


From the Category Query, users can view all existing Categories along with their description. Highlight the Category to be used and click select or double click on the Category to be used. The query screen will be closed and the value will be placed in the Category field.

Category Query can be used to print a list of Categories or export a list of Categories.


Description

This is the description of the Category that has been selected. It is possible to enter HTML code in the description of the category. There is a short description which is displayed here that allows for 64 characters. There is also a short description that is 2k and a long description that is 4k in size.

Category Image

This is the full path to the image associated with the Category. The path can be looked up by clicking on the File Path button.  Navigate to the path that the image is saved and double click or select and click on open to copy the image to the images folder and make it available to Sage Data Exchange.

The path to the images folder is `../SageDataExchange/application/data/images`. Images in this folder will need to be synced to the client website that uses Sage Data Exchange. Only the image name is passed back to the client.

To view the image that is selected, click on the Image icon.  This will take you to the preview of the image. Click the **X** in the upper right to close the preview window.

Only .JPG, .BMP and .PNG will be displayed in this preview.

Main Navigation

This is a check box that will indicate that this Category is a Category that should be listed as the top level.

Enabled

This check box will enable or disable the Category from being used.

Secondary Grid

The secondary grid is where the list of products associated to this Category is entered.

	Item Code	Description
1		


Sage Data Exchange - Category Maintenance - Secondary Grid

Rows will be added as item codes are entered in.

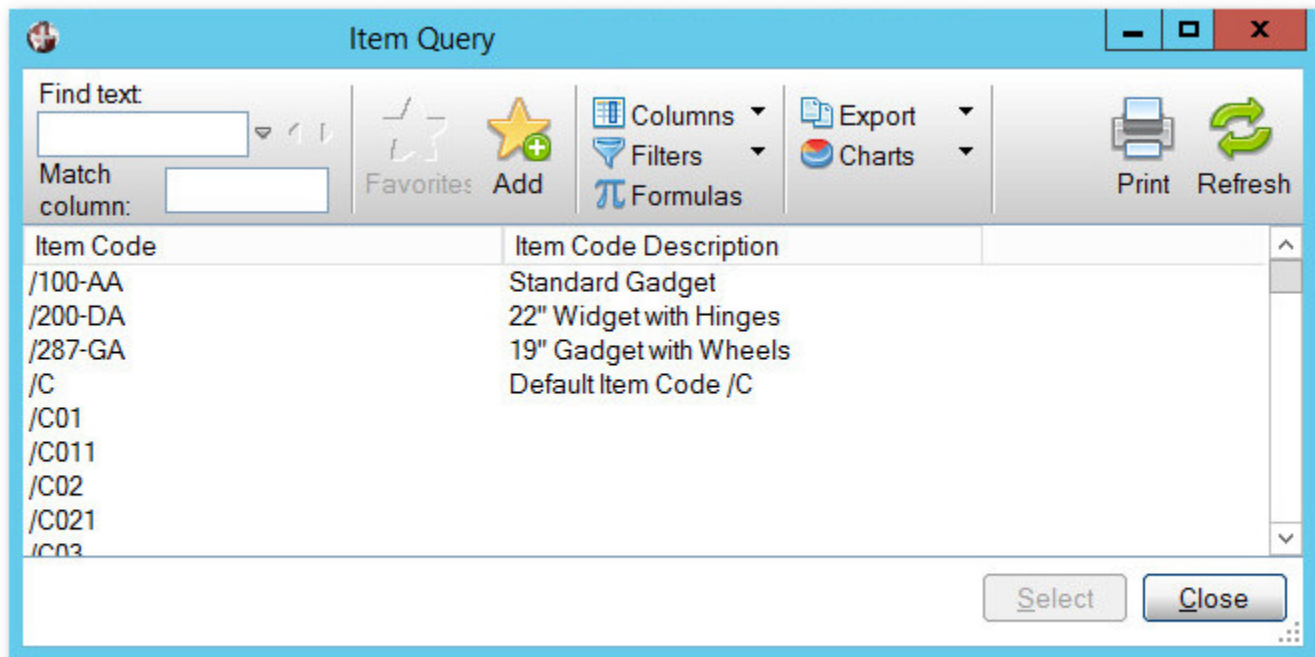
Fields

The following are the fields available on the secondary grid of the **Category Maintenance** Screen.

Item Code

This is the item code that will be associated with this Category. Each Category can have one or more Item Codes listed. The Item Code can be manually entered or can be looked up by clicking on the lookup button. 

When the lookup button is clicked the Item Query will display.



Sage Data Exchange - Item Query

From the Item Query, users can view all existing Items along with their description. Highlight the Item to be used and click select or double click on the Item to be used. The query screen will be closed and the value will be placed in the Item Code field.




Item Query can be used to print a list of Item Codes or export a list of Item Codes and their descriptions

Description

After an item is entered in the secondary grid, the Description field becomes available. It will default with the description from the inventory maintenance and it can be modified here for Sage Data Exchange's list of Items related to the Category.

Buttons

The list of Item Codes that belong to a Category can be adjusted with the use of the buttons to the right of the Secondary Grid.

- To insert a row, select the row you wish to insert to and click on the Insert Row button 
- To remove a row, select the row to be removed and click on the Delete Row button 
- To move the row up by one row, select the row to move and click on the Move Up button 
- To move the row down by one row, select the row to move and click on the Move Down button



From:

<https://wiki.mbabsi.com/> - **Documentation**

Permanent link:

<https://wiki.mbabsi.com/doku.php/enhancements/sage100/modules/sde/application/category-maintenance>

Last update: **08/31/2018 13:56**

