Heartland | Cash Register Express

Department Maintenance Guide

Rev 12/2020

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Overview

Establishments can carry anywhere from a few dozen to tens of thousands of items and/or services. Regardless of how many inventory and menu items your business sells, it is useful to break your items and/or services down into smaller groups. This can be beneficial when reporting as well as performing certain tasks or searching through inventory. In CRE\RPE, items/services can be grouped into **Departments**. Departments can then be further grouped into Categories, which is discussed in the Category Maintenance section of this document.

If you have questions regarding this report, please contact Cash Register Express Support at 888.319.0521 or DAM@heartland.us.

Latest Changes

As of CRE version 13.1025, CRE allows merchants to restrict the sale of designated departments during specified times and days. This facilitates adherence to local and state retail laws related to restricted items such as alcohol. This feature is covered in detail in the Restricting Department Sales section of this guide.

Description

The **Department Maintenance** screen displays one department's information at a time. The top of the screen display properties of the current department. To navigate between departments, use the arrows and drop down on the bottom left of the screen. To **Add**, **Update**, **Delete,** and **Exit,** use the buttons on the bottom of the screen.

The **Department Maintenance** screen can be used to configure department types, including **Regular**, **Rental,** and **Employee**. We will cover these in more detail in the **Department Type** section.

A few uses of departments are:

▸ Report on the sales of one or a combination of departments. For example, report how much candy you sold in a retail store, or how many beverages you served in a restaurant.

▸ Quick Lookup - Look for a chocolate bar in the candy department instead of looking through your entire inventory list. This is helpful when searching for inventory in the inventory lookup window, at the invoice screen, and in inventory maintenance.

▸ Count and reorder inventory by department, breaking one huge task down into separate sections.

▸ Make a price change, put items on sale, etc., one department at a time, instead of individually. For example, instead of adding a sale price to a 2-liter regular soda, 2-liter lemon-lime soda, 2-liter root beer, you can put the entire 2-Liter-Soda department on sale.

You can access the Department Maintenance screen by choosing **Administrative,** then **Department Maintenance** from the **Manager/Options** screen.

Please note that CRE\RPE comes with a default department (NONE). This department cannot be deleted.

Department Maintenance Screen

In this section, we cover the components of the Department Maintenance screen, including each of its fields and buttons.

There is an **Info menu** on the top left of the **Department Maintenance** screen. The Info menu displays two options:

‣ **Change Department ID** – This option will allow you to change the department ID, which can be changed for reporting purposes.

‣ **Toggle Sort Order** (shortcut Shift+F2) – This option will toggle the sort order of the departments.

Category for this Department (optional, recommended) - Each department can be placed into a category. Categories are at the highest level in the hierarchy. For example, if you have a restaurant with a retail store in front (which sells branded merchandise), you can create two categories, one for the retail sales and one for the restaurant sales. Categories can be set up in the **Category Maintenance** screen.

Category for this Department | NONE - NONE ▾

Department ID (required) - A unique identifier of the department. Some businesses use numeric IDs to match accounting and tracking systems already in place. Others use a word such as "PRODUCE", "LIQUOR", etc. You may not have more than one department with the same department ID.

Department ID | NONE

Department Description (required) - A 30-character description of the department that appears on many buttons, searches, and reports within CRE\RPE.

Department Description | NONE

Keyboard - Selecting this button will display the on-screen keyboard. To use this feature, first select the field you wish to complete or edit, then select **Keyboard**. CRE will open an on-screen keyboard for you to enter desired text.

Keyboard

Department Type (required) -- There are three types of departments in CRE\RPE.

‣ **Regular** - The standard department type used for any type of merchandise or service that is provided to your customers. This is the most commonly used department type for your inventory. An example department would be the Candy department.

◉ **R**egular

○ **R**ental

○ **E**mployee

‣ **Rental** -- Any inventory item placed inside this department type will be available for rental instead of for sale. Only items that will be rented out to customers should be placed inside of this department, not standard items that you strictly sell. An example department of this type would be the Movie Rental department. When this is enabled, items within the rental department will not use combine lines.

‣ **Employee** - If you wish to organize your employees by department, create a few departments of the Employee type. This is typically set up for reporting and labor scheduling purposes. A few examples of this department type are the Server department, the Cashier department and the Manager department.

Print Department Notes on Receipt – This feature is used in conjunction with the feature **Print Dept Notes Receipt** (**Receipt** tab of the **Setup Screen**). Department notes will need to be entered on the **Receipt Notes** tab of the department maintenance screen.

☐ **Print Department Notes on Receipt**

Require Permission for Sale – This option when checked, will apply the option **Special Permission** on the inventory maintenance screen for each item in said department. The permission Sell Special Items will need to be configured for each **Employee** in employee maintenance.

This option will need to be re-checked after new items are added to this department. After new items are added this option will need to be unchecked and then saved, rechecked and saved. You will be prompted to confirm your decision.

☐ **Require Permission for Sale**

Require Serial #/ Reference Entry – This option, when checked, will apply the option **Use Serial/Batch #** on the inventory maintenance screen for each item in said department.

This option will need to be re-checked after new items are added to this department. After new items are added this option will need to be unchecked and then saved, rechecked and saved. You will be prompted to confirm your decision.

☐ **Require Serial #/ Reference Entry**

Bar Tax Inclusive - This option when checked, will apply **Bar Tax** on the inventory maintenance screen for each item in said department. Select this box if you want the price of your drinks to include bar tax, for example, $5.00 instead of $5.17 for a beer.

This option will need to be re-checked after new items are added to this department.After new items are added this option will need to be unchecked and then saved, rechecked and saved. You will be prompted to confirm your decision.

☐ **Bar Tax Inclusive**

Include In Scale Export – This option will need to be checked if you would like to export the items in this department to your scale application. After selecting this option for all the departments you would like to export, select the **Export Items to Scale** button.

Note: Before using this feature settings for the scale application must be configured (under **Deli Scale Type**). These options can be configured on **Page 3** of the **Hardware** tab of the **Setup Screen**.

☐ **Include In Scale Export**

Item Cost Percentage – This option is used to automatically calculate the price of items added to your inventory when a cost is entered. When entering a value it must be entered as 100 (which will be 100% and will double the cost that is entered in inventory maintenance).

Item Cost Percentage   0

Receipt Notes tab – Here is where receipt notes will need to be entered.
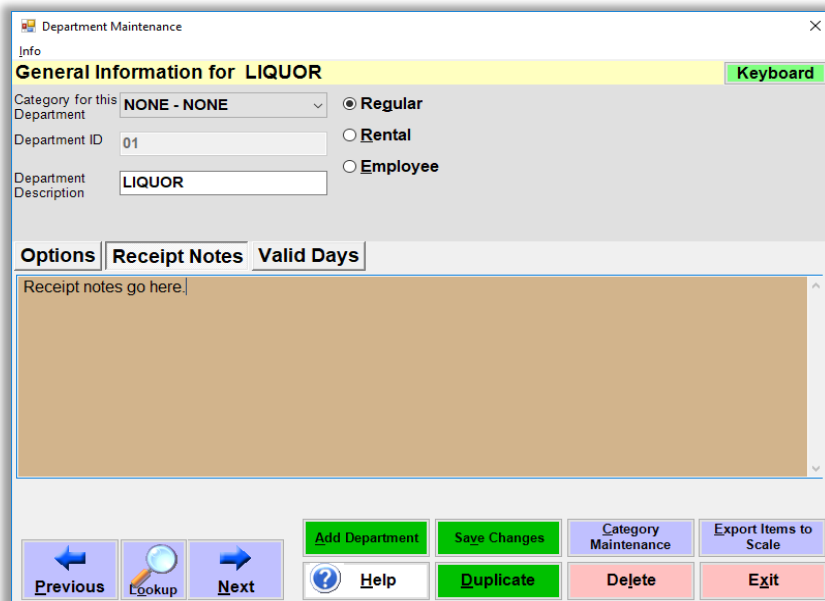
Use the **Previous** and **Next** buttons to cycle through the department that is being displayed.

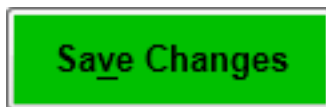**Look up** – This button will bring you to the Department Lookup Window.

Add Department – This button will allow you to create new Departments in your database.

Help – This button will display the CRE/RPE help section. The help section can also be brought up by selecting F1 on your keyboard.
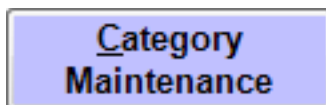
**Save Changes** – This button will save any changes made to the department.

Duplicate – This button will duplicate the current department.

Category Maintenance – This button will bring you to the **Category Maintenance** screen.

Delete – This button will delete the department from the database. All items in this department will be moved to the NONE department when a department is deleted.
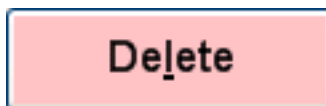
Export Items to Scale – This button will export all inventory in the departments to the scale application. This should be done after **Include in Scale Export** has been checked on all departments.

Note: Before using this feature settings for the scale application must be configured (under **Deli Scale Type**). These options can be configured on **Page 3** of the **Hardware** tab of the **Setup Screen**.

Export Items to Scale

Exit – This button will Exit from the department maintenance screen.

Exit

Category Maintenance Screen

Each department can be placed into a category. Categories are at the highest level in the hierarchy. For example, if you have a restaurant with a retail store in front (which sells branded merchandise), you can create two categories, one for retail sales and one for restaurant sales. Another example is, a liquor store can place RED WINE and WHITE WINE departments into a WINE category.

**Add** – This button will allow you to create new Categories in your database.

Add
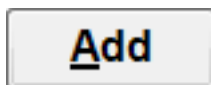
Update – This button will save any changes made to the category.

Update

Delete – This button will delete the category from the database. All departments in this category will be moved to the NONE category when a category is deleted.

Delete

Exit – This button will Exit from the category maintenance screen.

Exit
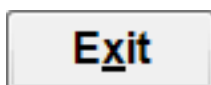
Category ID (required) - A unique identifier of the category. Some businesses use numeric IDs to match accounting and tracking systems already in place. You may not have more than one category with the same Category ID.

Category ID

NONE

Description (required) - A description of the category that appears on searches and reports within CRE\RPE.

Description

NONE

Use the **Previous** and **Next** buttons to cycle through the category that is being displayed.

Search by Category ID – Use the dropdown to select the category to be displayed.

Search by Category ID

NONE

Common Maintenance Functions

Adding a Department

1 Enter the Department Maintenance screen.

2 Select the Add Department button.

3 Enter a Department ID in the corresponding field (ex: VEGGIES).

4 Enter a Department Description in the corresponding field (ex: Vegetables).

5 Select any necessary options that you would like on the department.

6 Select a category and department type (if applicable).

7 Select the Save button.

You have created a department! You may now place inventory items into this department through the Inventory Maintenance screen.

Adding a Category

1 Enter the Department Maintenance screen.

2 Select the Category Maintenance button.

3 Select the Add button.

4 Enter a Category ID in the corresponding field.

5 Enter a Description in the corresponding field.

6 Select the Save button.

You have created a category! You may now place departments into this category through the Department Maintenance screen

Assigning a Department to an Item

1   Enter the Inventory Maintenance screen.

2   Locate the item you wish to modify using the Navigation controls on the bottom left of the screen

3   Select the dropdown box immediately to the right of Department for this Item.

4   Choose the department you want to place this item into.

5   Select the Save Changes button on the bottom of the screen.

Your item is now in this department.

Restricting Department Sales

You can restrict the sale of designated departments during specified days and times. To use this feature, do the following:

1   Select **Manager** or **Options** and enter credentials if prompted.

2   Select **Administrative | Department Maintenance**.

3   Find the department for which you wish to set restrictions and select the **Valid Days** tab.

By default, CRE allows sales during all days and times, with each day running from 12:00:00 AM to 11:59:59 PM to facilitate setup for 24-hour retailers.

4   Merchants can add or remove times as needed. To restrict the sale of items for specific hours – for example, if alcohol sales are allowed only after 12 PM on Sunday – select **Add Time** and follow the prompts.

5 Once all days and times are set as preferred, select **Save Changes**. CRE will return you to the department maintenance screen with the new **Valid Days** parameters reflected.

Please note:

▸ A blank time field on any given day indicates restriction, meaning that items from the department cannot be sold at any time on that day.

▸ Department restrictions are enforced only during the sale of affected items. This means you can perform returns of said items with receipt at any time.

▸ CRE always displays departments, even during restricted times and days.

▸ If a cashier attempts to add a restricted item to an invoice, CRE will display a message informing the cashier of the restriction, and that the selected item cannot be sold at this time.

▸ CRE handles restricted rental items in the same manner, but changes the message to indicate that the selected item cannot be rented at this time.