

# How to create a category tree in HDPOS smart?



HDPOS smart Tutorials

Category tree will be useful to view the data in your database in many different ways. This will help you to filter the data and narrow your search quickly. Category tree is useful to check **Stock and Daily Sales drill down** and for **Eshop**.

To create a category tree, follow the steps below.

1. Run **HDPOS smart**. From main screen, click on **Set-Up**.

S No.	Barcode	Item Name	Qty / Weight	Measuring Unit	Unit Price with Tax	Total with Tax
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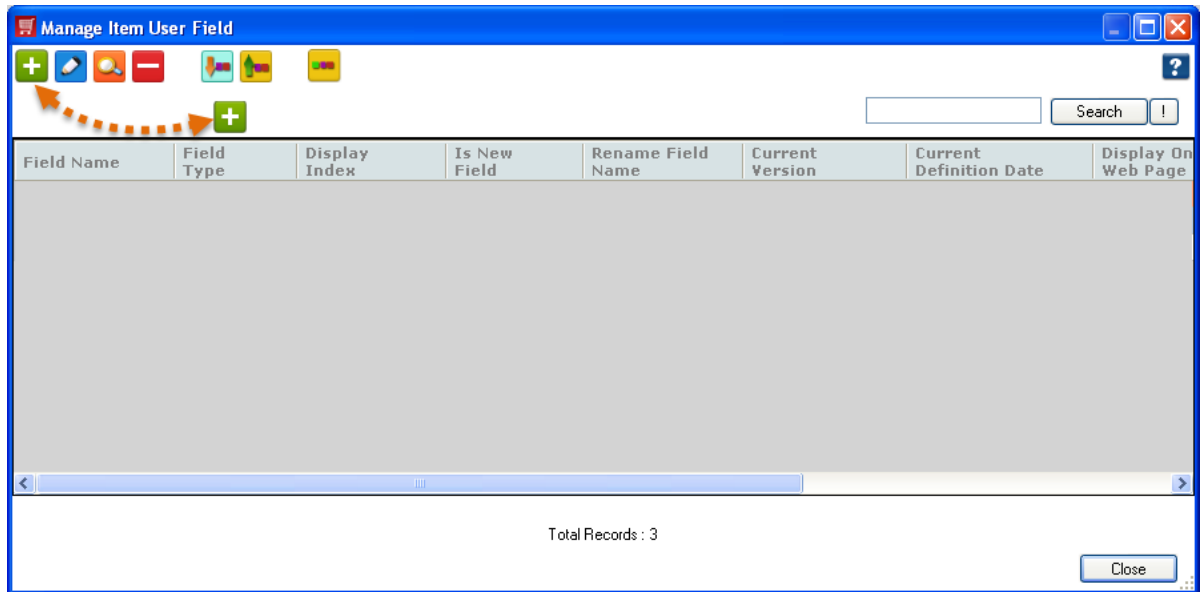
2. Go to 4<sup>th</sup> page. Click on **Settings**. From **System Setting** screen, click on **Item Fields**.

1	2	3	4	5
Settings	Estimate Invoice			
Delivery Details	Data Movement			
Make Plan	Customer Item			

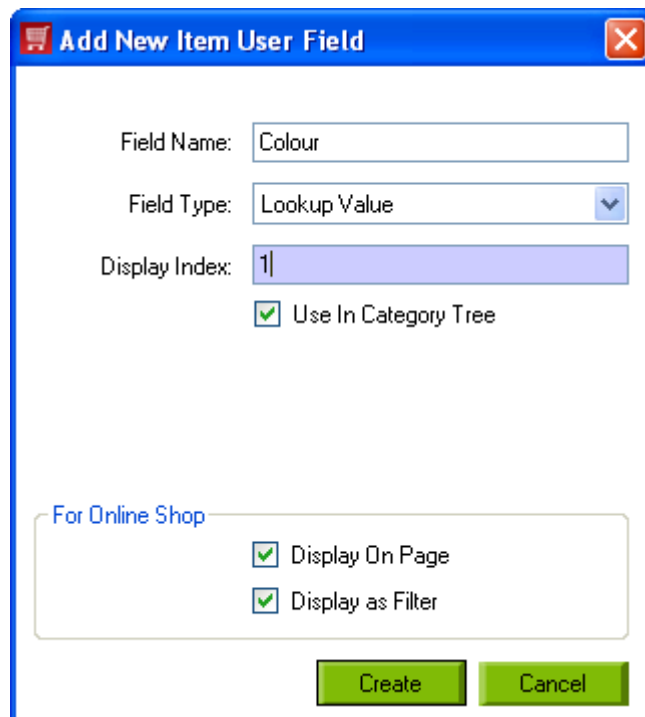
INVOICE	PRINTER	CURRENCY
TECHNICAL SETTINGS	GENERAL	DATE FORMAT
BACKUP	EMAIL SETTINGS	WEIGHING SCALE (3.50)
CODE FORMAT	FA FIELDS	ITEM FIELDS
CUSTOMER FIELDS	SUPPLIER FIELDS	C.I. FIELDS



3. You will see the **'Manage Item User Field'** screen. Click on **'Add Item User Field'** button.



4. You will see the **'Add New Item User Field'** screen as shown below. Enter the required details.
- Field Name:** Enter the field name here.
  - Field Type:** Select the type of field as **'Look up Value'**.
  - Display Index:** Enter any value for display index.
  - Use in Category Tree** checkbox: Check this checkbox. This checkbox will only appear when the field type is **'Look up Value'**.
  - Click on **Create**.



Note: Repeat **Ste4** to create as many **Item User Fields** as you want.



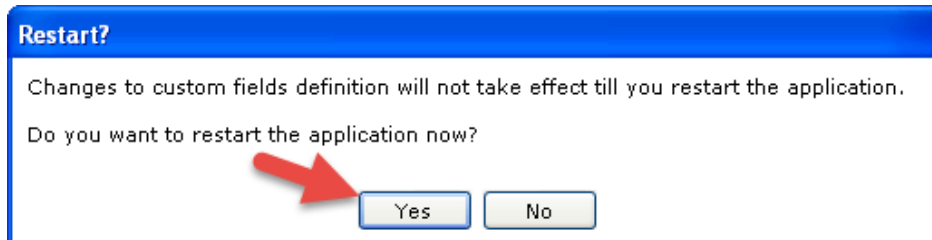
5. You can see the list of user fields that are created as shown below. Click on **Close**.

Field Name	Field Type	Display Index	Is New Field	Rename Field Name	Current Version	Current Definition Date	Display On Web Page
Colour	Lookup Value	1	Yes		1		1
Brand	Lookup Value	2	No		6	17/03/2015 11:45 AM	1
Size	Lookup Value	3	No		6	17/03/2015 11:45 AM	1
Fit	Lookup Value	4	No		6	17/03/2015 11:45 AM	1
Gender	Lookup Value	5	No		6	17/03/2015 11:45 AM	1
Occassion	Lookup Value	6	No		6	17/03/2015 11:45 AM	1

Total Records : 6

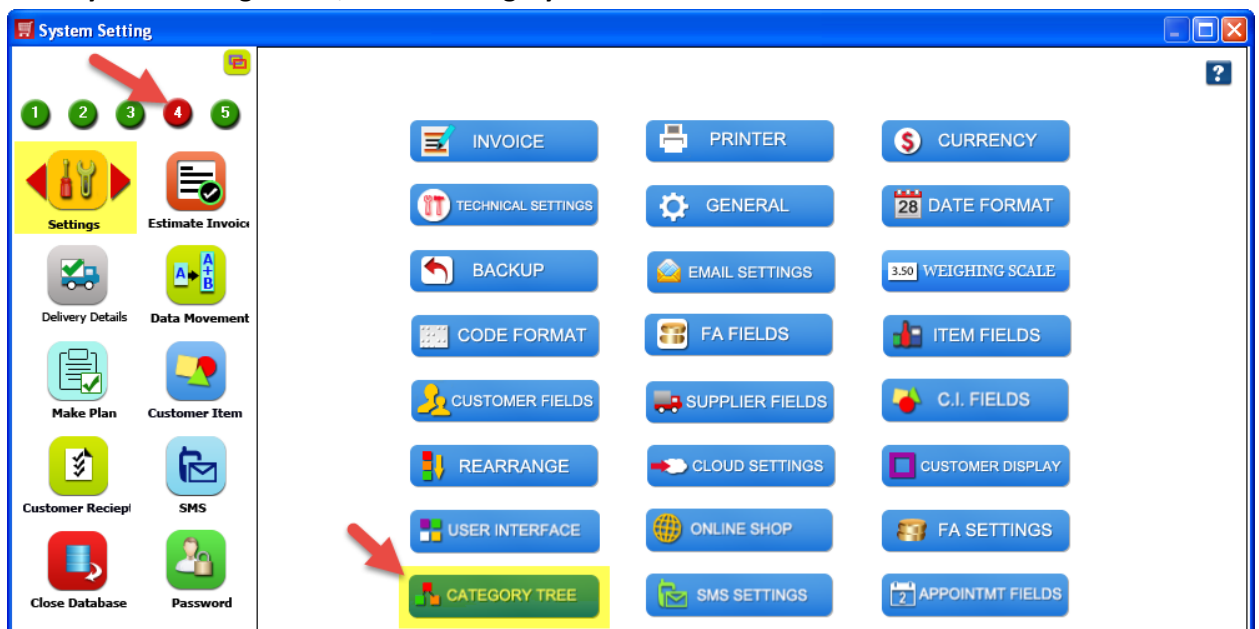
Close

6. A message will be shown to you as below, to restart the application. Click on **Yes**. The application will be restarted.



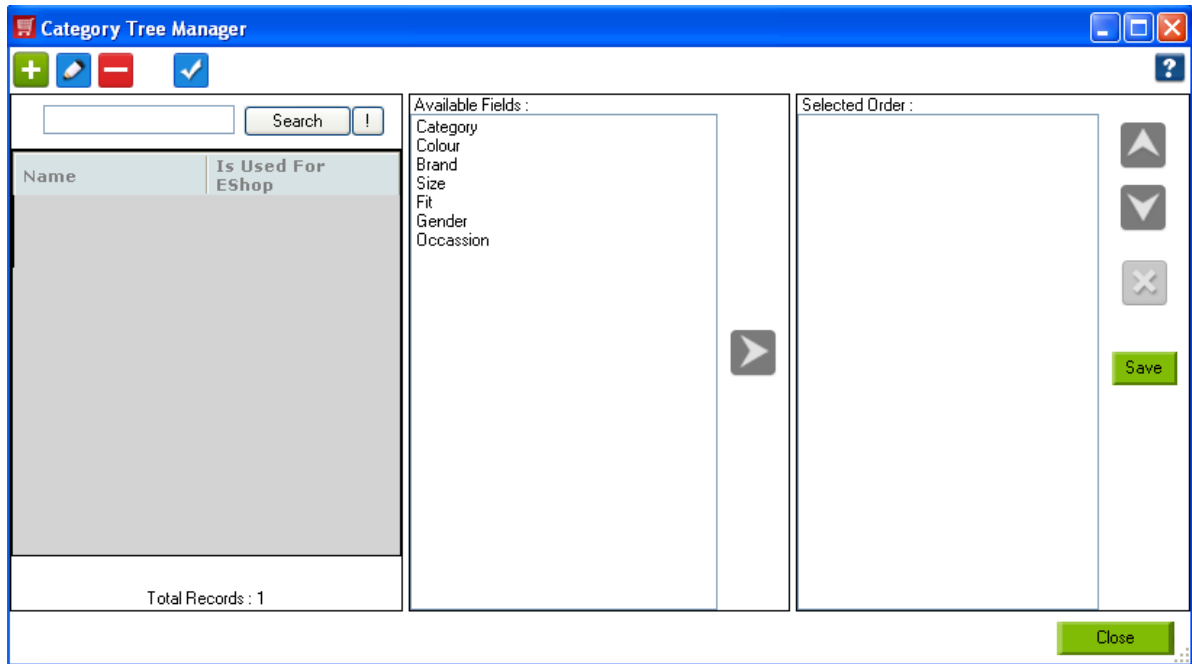
7. HDPOS smart will be opened for you. From main screen, click on **Set-Up**. Go to 4<sup>th</sup> page, click on **Settings**.


8. From **System Setting** screen, click on **Category Tree**.

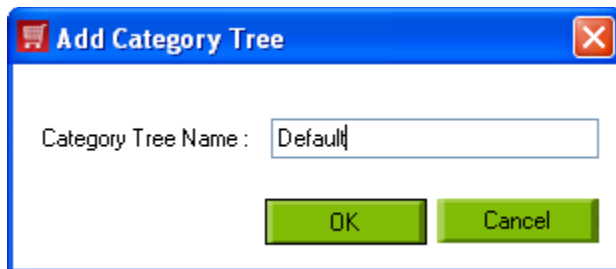




9. You will see the screen of **Category Tree Manager**, where all item user fields are listed under **Available Fields** section.

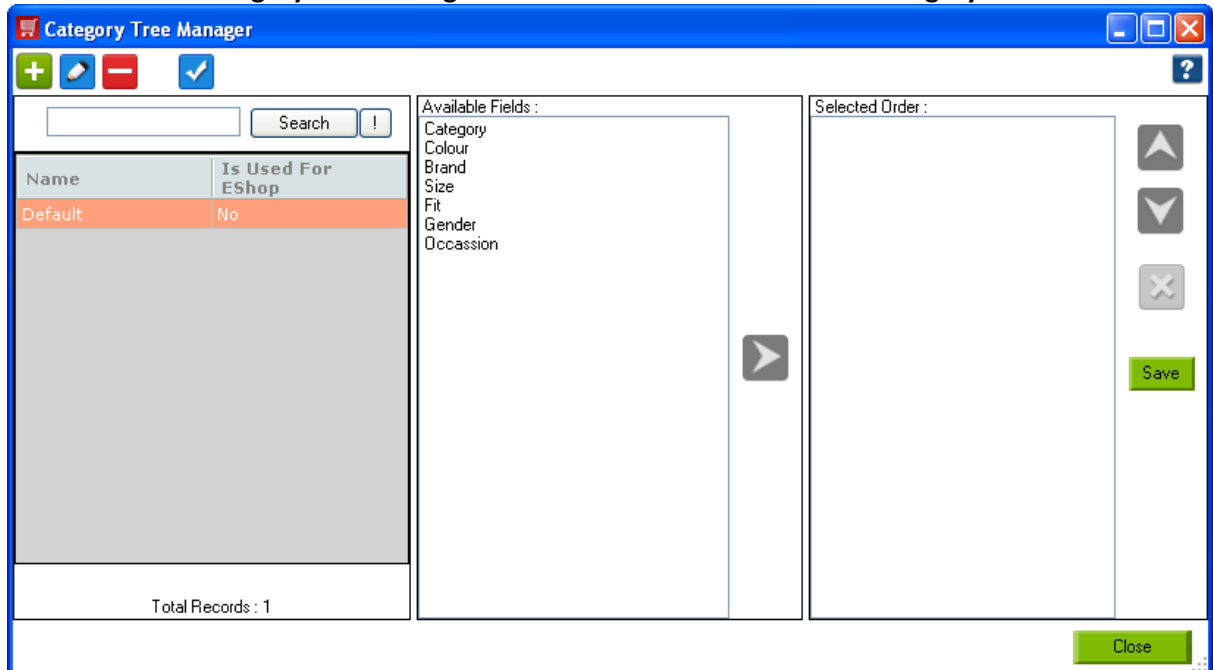


10. Click on **Add Category Tree** button , you will see the following screen. Enter the name for Category Tree and click on **OK**.







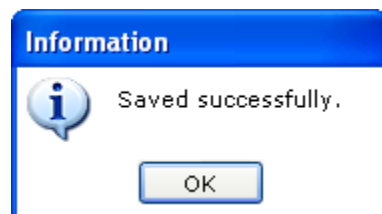


11. You will see the **Category Tree Manager** screen as below that shows the **Category Tree Name**.



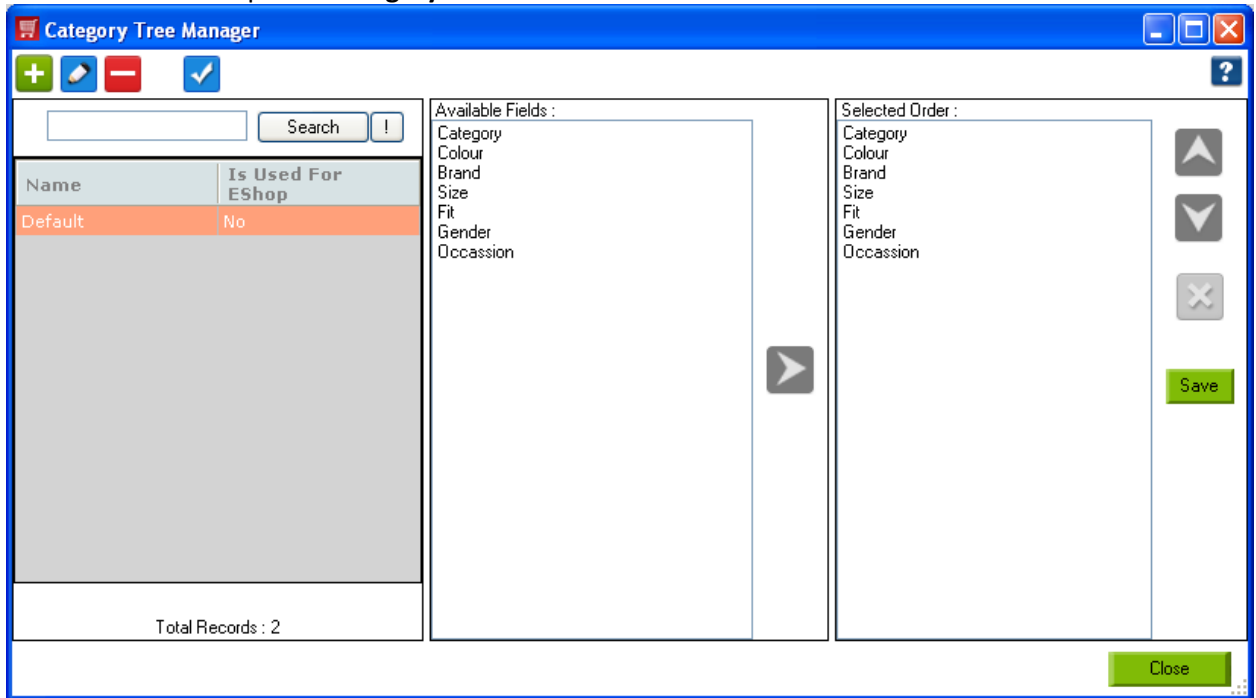
12. Now add fields to the Category tree.

- Select a field from **Available Fields**. Click on  button. This will move the selected field to **Selected Fields** section.
- You can use  and  buttons to move the fields up and down. Click on  button to delete any fields.
- Click on **Save**. You will see the success message as shown below. Click on **OK**.



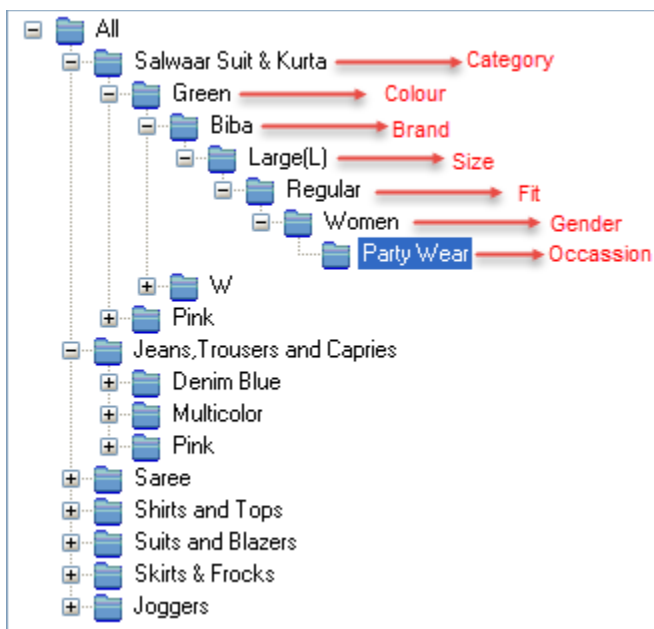


13. You can see the completed **Category Tree** as shown below. Click on **Close** button.



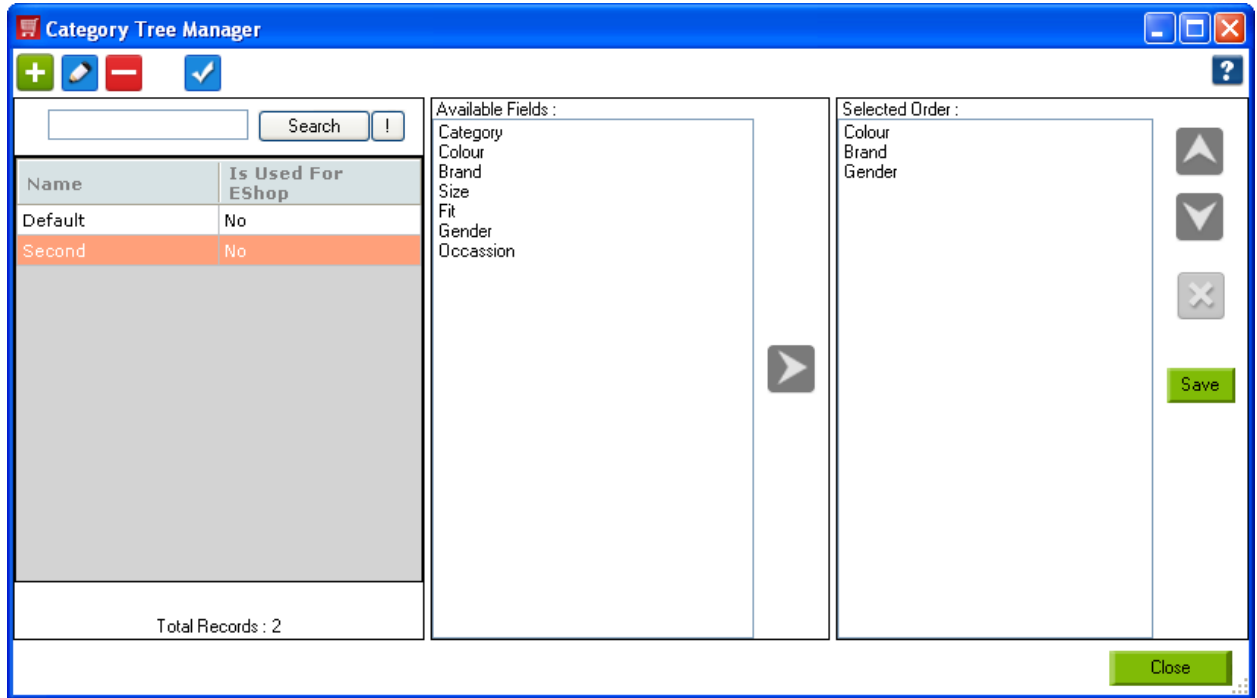
**Note:** Repeat **Steps10, 11, 12 and 13** to create another category tree. You can create as many category trees as you want.

14. With the above category tree, when you view the data in **Stock Drill Down** or **Daily Sales Drill Down** or Eshop; the order of view will be as shown below.





15. For example I have created another category tree, with fields **Color, Brand and Gender** as shown below.



16. With the above category tree, when you view the data in **Stock Drill Down** or **Daily Sales Drill Down** or Eshop; the order of view will be as shown below.

