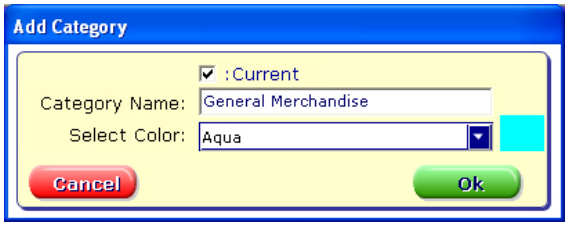
Inventory Categories

Inventory Categories allow you to efficiently organize the products at your facility, and easily sell them through the Payments & Product Sales feature.

Creating a new Inventory Category

1. From the More Options Menu, select **Inventory Mgmt.**
2. Select *Add Category* from the drop-down menu at the bottom of the screen.



3. Type the category name of the new inventory category, select its color, and click **OK**.

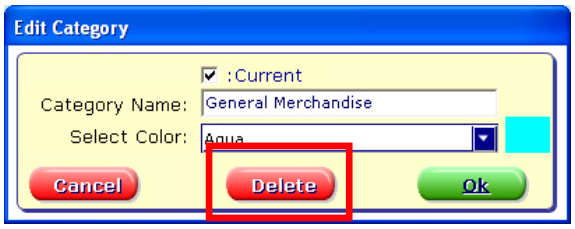
Changing the Inventory Category of an Item

1. From the More Options Menu, select **Inventory Mgmt.**
2. Click on the name of the inventory item.
3. Click **Edit**.
4. Choose the inventory category from the drop-down menu:

5. Click **Save**.

Deleting an Inventory Category

1. From the More Options Menu, select **Inventory Mgmt.**
2. Click on the name of the category you wish to delete.
3. Click on the red **Delete** button.

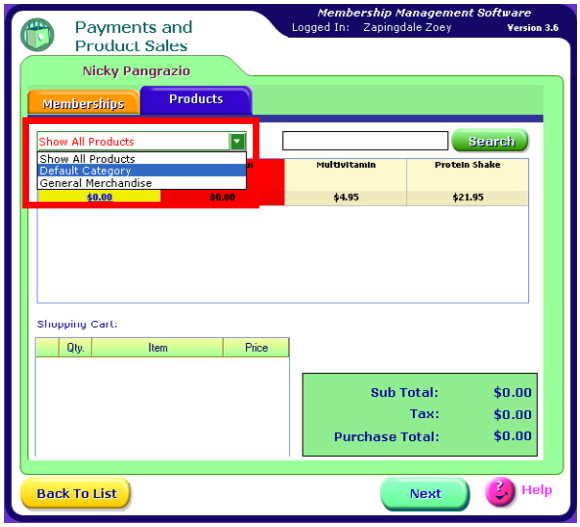


Note: You cannot delete an inventory category while there are inventory items assigned to that category.

Selling Inventory using Payments & Product Sales

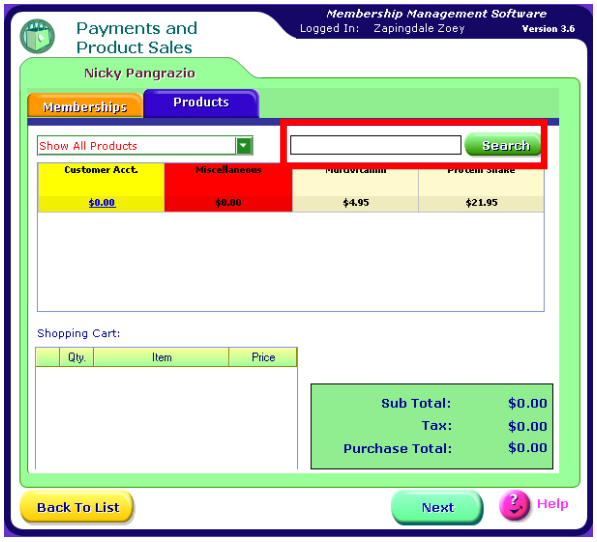
1. From the Main Menu, select **Payments & Product Sales.**
2. Click on the name of the member (or click **Non-Member Sale**).

   To select an inventory item from a particular category, choose that category from the drop-down menu:



Note: To see inventory items from all categories, choose *Show All Products* from the drop-down menu.

3. To search for an inventory item, type the name (or part of the name) in the search textbox, and click the **Search** button:



Note: The system will only search for the item in whatever category is selected in the drop-down menu at the left.

To search in all categories, make sure *Show All Products* is selected in the drop-down menu at the left.