

Managing Sets & Categories

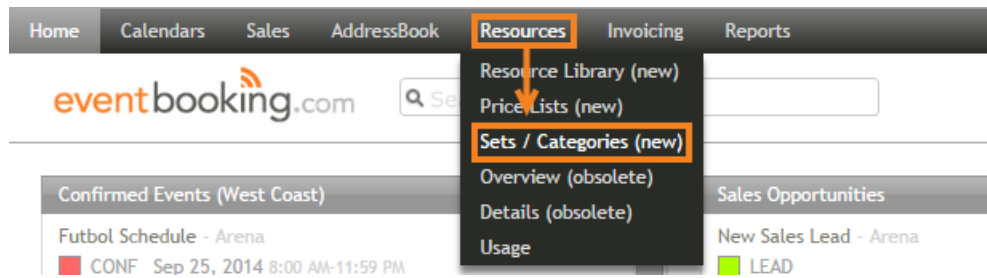
Updated: September 29, 2014

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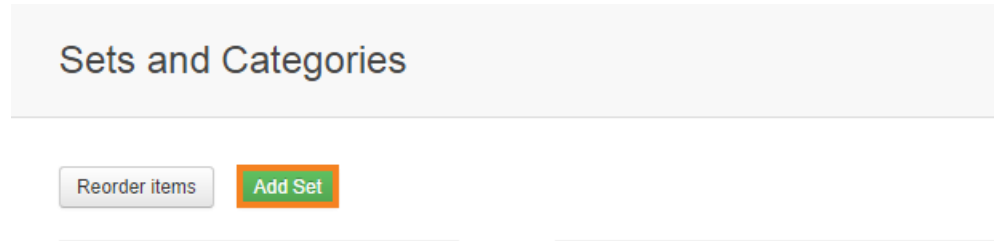
Navigating to the Sets and Categories Page

1. Hover over **Resources**.
2. Click **Sets / Categories (new)**.



Adding a Set

1. Click **Add Set**.



2. Type a name for the set. ***Required**
3. Select a GL account from the drop-down. For more information on GL accounts, please see [the full article](#).
4. Type any special instructions for invoices containing resources from this set.
5. Check any taxes, discounts or charges that should be applied by default to resources in this set. For more information on multipliers, please see [the full article](#).
6. Click **Save**.

Add Set

The screenshot shows the "Add Set" form with the following fields and options:

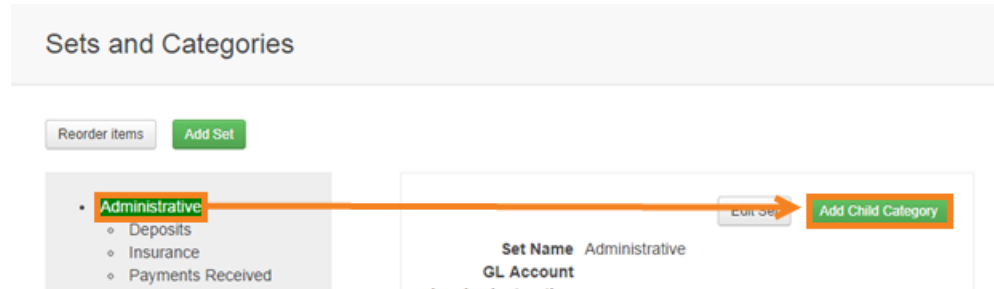
- Set Name: Other
- GL Account: None
- Invoice Instruction: See John
- Taxes, Discounts, and Charges:

<input type="checkbox"/>	Sales Tax (9.25%)	9.25%
<input type="checkbox"/>	New Client Discount	100
<input type="checkbox"/>	Service Charge (Arena)	5%
<input type="checkbox"/>	Service Charge (CC)	10%
<input type="checkbox"/>	Service Charge (Other)	7.5%
<input type="checkbox"/>	Alcohol Tax	9.25%
<input type="checkbox"/>	Sales Tax (7%)	
<input type="checkbox"/>	Repeat Client Discount	10%
- Buttons: Save, Cancel

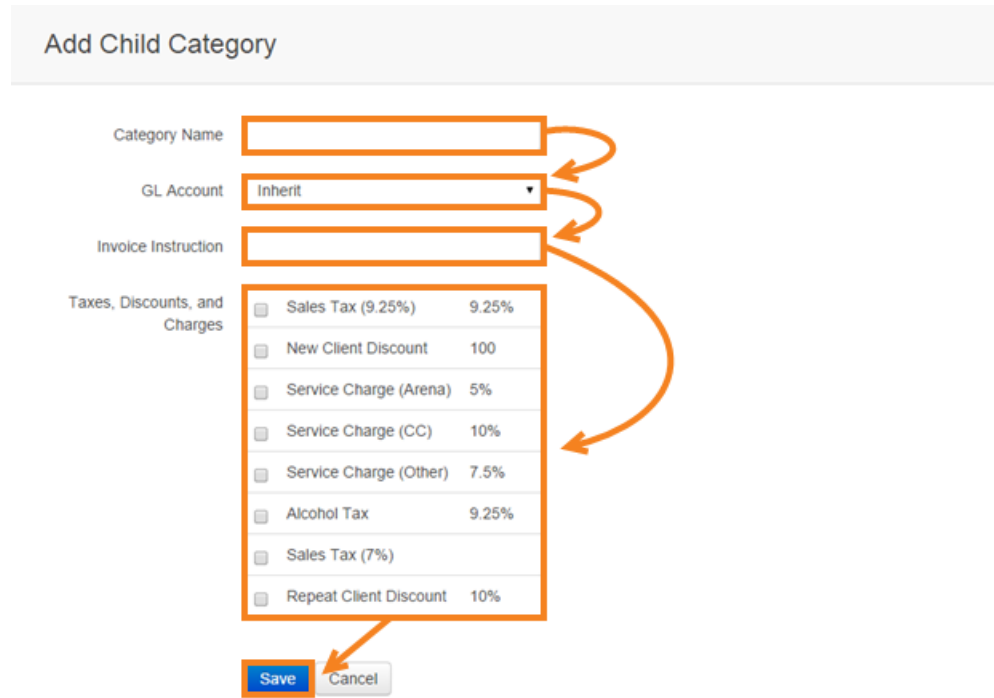
Orange boxes and arrows highlight the Set Name, GL Account, Invoice Instruction, Taxes, Discounts, and Charges section, and the Save button.

Adding a Category

1. Click the set or category under which you would like to add a category.
2. Click **Add Child Category**.

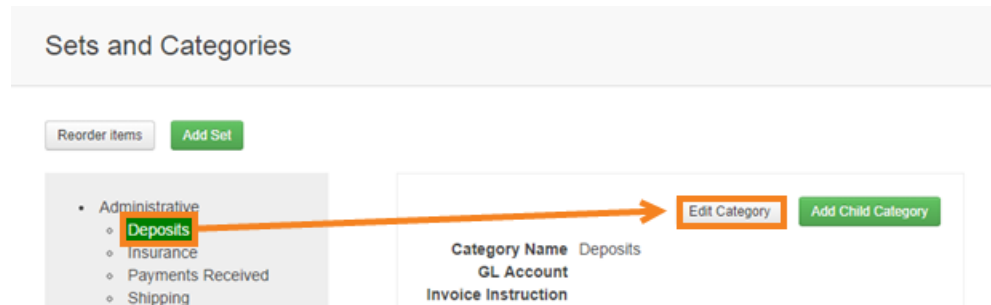


3. Type a name for the category. ***Required**
4. Select a GL account from the drop-down. For more information on GL accounts, please see [the full article](#).
5. Type any special instructions for invoices containing resources from this category.
6. Check any taxes, discounts or charges that should be applied by default to resources in this set. For more information on multipliers, please see [the full article](#).
7. Click **Save**.

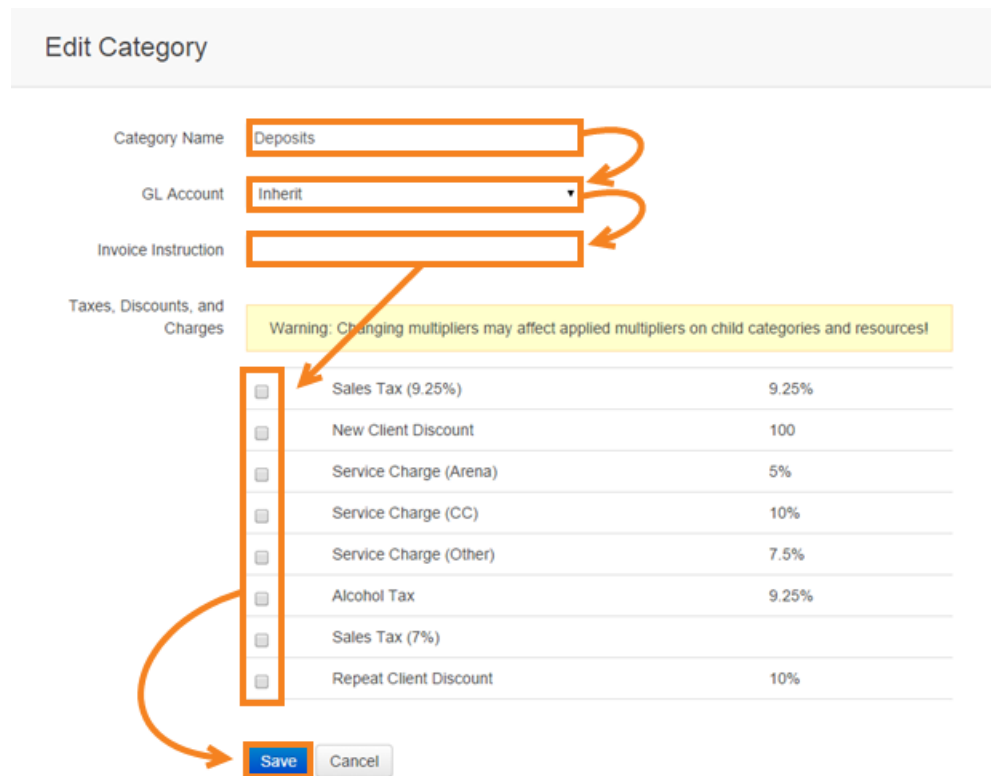


Editing a Set or Category

1. Click the set or category you would like to edit.
2. Click **Edit Set** or **Edit Category**.



3. Edit or remove any of the set's or category's information. **Sets and categories are required to have a name.*
4. Click **Save**.



Reordering Sets and Categories

1. Click **Reorder items**.

Sets and Categories

Reorder items

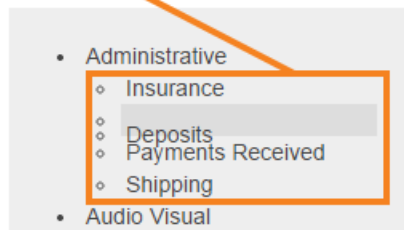
Add Set

2. Drag the set and category names to reorder them on the list. Please note that you cannot use this feature to move categories from one set or category to another, only to reorder them in their current set or category.
3. Click **Done**.

Sets and Categories

Done

Drag and drop items to reorder them

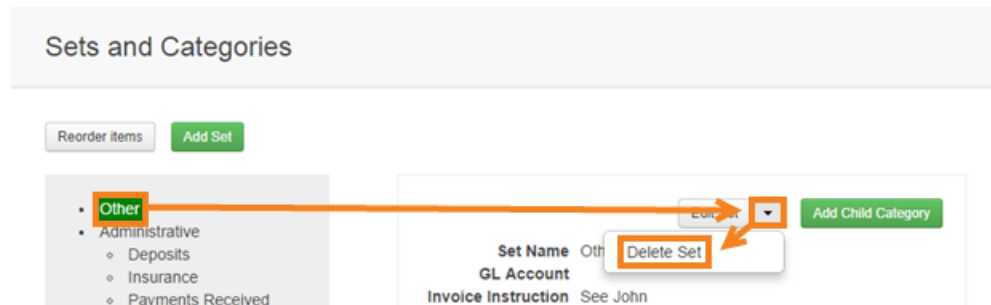


Deleting Sets and Categories

1. Click the set or category you want to delete.
2. Click the down arrow next to **Edit Set** or **Edit Category**.

Note: if the set or category has any categories or resources in them, they will not have this down arrow. Sets and categories must be empty before they can be deleted.

3. Click **Delete Set** or **Delete Category**.



4. Click **OK** to confirm that the set or category should be deleted.

