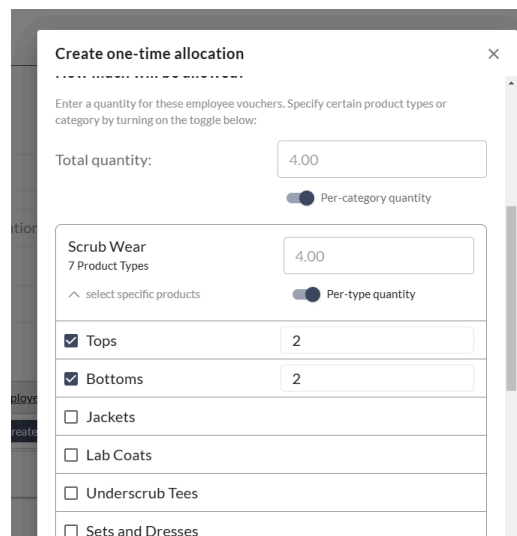


Allocations - Per Category Budgets

1. Per Category Budgets allow Uniform Store Admins to restrict how employees can spend their allocations. A few common use cases for this feature include the following.
 - a. An organization wants to encourage or require employees to purchase a specific amount or type of item. For example, if this organization wants to make sure an employee working 5 days a week orders 5 sets of scrubs at hire, they can assign new hires a set allotment of 5 scrub tops and 5 scrub bottoms that can only be redeemed on those specific items using this feature.
 - a. When utilizing per category budgets with your allocation across multiple categories of apparel, we recommend utilizing set allotments. This creates a better user experience when your employees shop. For example, if issued 2 scrub tops, 2 Scrub Bottoms, and 1 Polo Shirt, this allotment can be used to cover the cost of those exact items.

In contrast, splitting a dollar allocation across multiple categories can be confusing and frustrating as it can feel difficult for the employee to redeem the full allocation if for example, they were assigned \$150 of scrubwear and \$35 to be used on polo shirts.



Create one-time allocation

Enter a quantity for these employee vouchers. Specify certain product types or category by turning on the toggle below:

Total quantity:

☒ Per-category quantity

Scrub Wear
7 Product Types

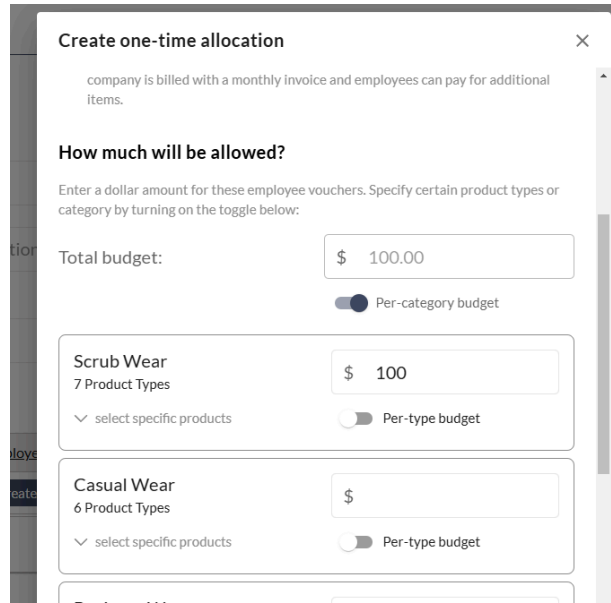
☒ Per-type quantity

<input checked="" type="checkbox"/> Tops	<input type="text" value="2"/>
<input checked="" type="checkbox"/> Bottoms	<input type="text" value="2"/>
<input type="checkbox"/> Jackets	
<input type="checkbox"/> Lab Coats	
<input type="checkbox"/> Underscrub Tees	
<input type="checkbox"/> Sets and Dresses	

- b. An organization requires that an allocation be used on a specific item category like scrubwear, while also allowing their employees to purchase alternative items like outerwear outside of those allocation funds.
 - a. We only recommend using a dollar allocation if you're limiting that allocation to one category. For example, a uniform program might assign

Uniform Stores

a \$200 allocation that the organization only wants employees to use on scrubwear items.



The screenshot shows a web form titled "Create one-time allocation" with a close button (X) in the top right corner. Below the title is a descriptive sentence: "company is billed with a monthly invoice and employees can pay for additional items." The section "How much will be allowed?" contains instructions: "Enter a dollar amount for these employee vouchers. Specify certain product types or category by turning on the toggle below:". The form includes a "Total budget:" label followed by a text input field containing "\$ 100.00". Below this is a toggle switch labeled "Per-category budget" which is currently turned on. There are two category sections: "Scrub Wear" with "7 Product Types" and a text input field containing "\$ 100", and "Casual Wear" with "6 Product Types" and a text input field containing "\$". Each category section has a "select specific products" link and a "Per-type budget" toggle switch, which are currently turned off.

For this specific example, we will be creating a Recurring Dollar Voucher Allocation.

2. Follow the steps of **“Creating an Allocation”**. After selecting who the allocation applies to. Select if you want to assign a dollar amount or set allotment (see notes above for best practice on utilizing those).

3. Select the “Per Category Budget” toggle. Clicking this will bring up a list of available item categories on your Uniform Store.

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Add New Allocation

Select Allocation Type:

☐ Dollar Voucher
Provides employees with a set dollar amount to apply towards their order. The company is billed with a monthly invoice. Employees can pay for any overages.

☒ Set Allotment
Best for providing employees with a specific number of items or uniform sets. The company is billed with a monthly invoice and employees can pay for additional items.

How much will be allowed?

Enter a quantity for these employee vouchers. Specify certain product types or category by turning on the toggle below:

Total quantity:

☒ Per-category quantity

Back Next

- a. To limit an allocation to a category of apparel like scrubwear (including scrub tops, scrub bottoms, scrub jackets, lab coats, etc...) enter the dollar amount or set allotment the employee should receive to utilize across this category.

How much will be allowed:

Enter a dollar amount for these employee vouchers. Specify certain product types or category by turning on the toggle below:

Total budget:

☒ Per-category budget

Scrub Wear

7 Product Types

^ select specific products

☒ Per-type budget

<input type="checkbox"/> Tops
<input type="checkbox"/> Bottoms
<input type="checkbox"/> Jackets
<input type="checkbox"/> Lab Coats
<input type="checkbox"/> Underscrub Tees
<input type="checkbox"/> Sets and Dresses
<input type="checkbox"/> Headwear

- If you need to restrict how employees can use their allocations down to the specific item type or subcategory (i.e scrub tops or scrub pants), select the “Per-Type Quantity” toggle underneath and assign the set or dollar amount to a specific item type. This is useful particularly for set allotments if you want to give the employee a specific number of items, like 2 scrub tops and 2 scrub bottoms for example.

How much will be allowed?

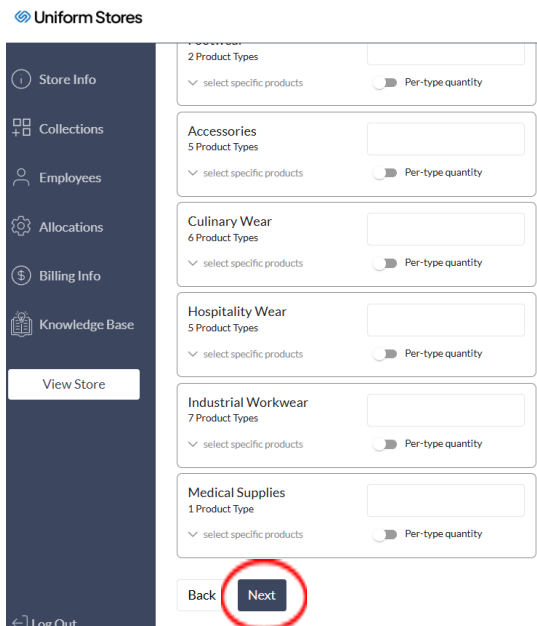
Enter a quantity for these employee vouchers. Specify certain product types or category by turning on the toggle below:

Total quantity:

☒ Per-category quantity

Scrub Wear 7 Product Types select specific products	<input type="text" value="4.00"/> <input checked="" type="checkbox"/> Per-type quantity
<input checked="" type="checkbox"/> Tops	<input type="text" value="2"/>
<input checked="" type="checkbox"/> Bottoms	<input type="text" value="2"/>
<input type="checkbox"/> Jackets	

- After making your per category budget selections, scroll down to the bottom of the page and select “Next”. Then follow the remaining steps in “[Creating an Allocation](#)” to complete this allocation.



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2 Product Types

select specific products

☐ Per-type quantity

Accessories

5 Product Types

select specific products

☐ Per-type quantity

Culinary Wear

6 Product Types

select specific products

☐ Per-type quantity

Hospitality Wear

5 Product Types

select specific products

☐ Per-type quantity

Industrial Workwear

7 Product Types

select specific products

☐ Per-type quantity

Medical Supplies

1 Product Type

select specific products

☐ Per-type quantity

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