# The Inventory Module

From the home screen of POSExpress, select the Inventory icon:



This will open the Inventory module. There are several buttons across the top of the Inventory screen. This document will focus on the basics of creating an inventory item. The other buttons will be explained in separate documents.

When opening the Inventory screen, the Products page is displayed. See the image below.

I	nvent	ory		PO.	Sexpress	Inven	tory Man	agemei	nt			
Products	Produc Suppl	ts by lier	Suppliers	Sales Rep	Purchas Orders		Gift Card	Rai	n Check	Package	s Mo	difier
S	earch &	Produ	ct List		1		Cre	ate Nev	v Product			
Product:			Go	Product Setup	Order Info	Tier Price	Advance	Other	Modifiers	Notes		
Suppli	ier		Category		Item Type	Produ	ət		-			
[AII]		• [All]		•	Supplier	-			*			
Sort by age i	💿 Asc 🕥 🖸	)esc 📃 S		ns	Category				•			
Code		Descript	tion	Dr	oduct Code				=			
1		1										
BOTTLERETUR		Bottle R		-	Description							_
DeclareCashT OnlineHandlin			Cash Tips ore Handling Fe.	C	atalog Cost	:	0.00	Size:				
OnlineShippin			ore Shipping Iter		Tax Code	N/A	Not 👻					
RENTALCHAR		Rental (		T Tay	Inclusive Price			Season	Coder			
SERVICECHAR Test1		Gratuity Test Ite		- Tak		1		3663011	0006.	1		
Test2		Test Ite		-	Retail Price	-	0.00					
TOTE		1050 100	200 6									
				Trac	k Inventory		Yes					
				-Aging \	/iew							
				_								
				_								
				-Cost De	tail							
					Ave	e Cost		\$0.00	Units in sto	ock 0		
					1.00	t Cost	-	\$0.00	Units on or	nder 0		
					Las	COSC	1	\$0.00	onits off of	uei lo		
				New			Delete	Receive	Print	Physical	Sale	EXI

On this screen, there is a *Search & Product List* section. You can display all items in inventory by clicking the Show All button. If you would like the list of items to be in ascending order by Code or Description, simply click the

column button. Click the column button again to have the items in descending order.

SExpress - [Inventory												
-	Enabled QA & Sup	oport Mode Invento	ry Help									
I	nventory			Prophet S	vstems In	ventory Ma	nagemen	t				
Products	Products by Supplier	Suppliers	Sales Rep	Purchase Orders	Gift Car	d Rain	Check	Packages	Modifier Setup	PO Builde Wizard	r	
S	earch & Produ	ict List					Pro	duct Infor	mation			
Product:		Go	Product Setu	Order Info	Tier Price	Advanced	Other	Item Modifiers	Notes	SKUS		
I Products Suppli [All]	ier [All]	Category	•	tem Type: F&B Supplier: Poc		•						
Sort by age		Show All		Category: Foo		•	Change Co	de				
Code	itock 0 - 1 Descrip	622 of 622 items		escription: Deli			chunge co					
1010 1013	Hot Do		Cat	alog Cost:	0.00				Delete			
1015	Yueng	Lager Sm Draft		Tax Code: 2	PA S 🕶							
1021 1022		ay Junior Riding GF - 18 Holes	Tax Inc	lusive Price:								
1023		GF - 9 Holes	R	etail Price:	\$8.95							
1024		GF - Upgrade 9-1										
1025	Chips Deli Sar	ndwich	Track	Inventory:	No	Price B:	0.00	Price C:	0.00 More Pr	ice		
1030	Annual	Pass - Unrestric.	HUCK		3.9394	T Zero Price		T Zero P		cc		
1031		ee Green Fee				7 Price	R	I Zero P	rice C			
1032 1034	Caesar	ee Guest Fee	Clone Iter	m								
1035		Green Fee	Cost Deta	il								
1036		oupon Free Cart	Ave Cost	\$0.0	0 Units in s	tock 0						
1037	The We											
1043 1047		Lettuce Tomato Complimentary	Last Cost	\$0.0	0 Units on (	order 0						
1051		Par 3 Pull				·						
1053	Club		New	Cancel	Save	Discontinue	Receive	Print Price		Sale		EXIT
1056	Homest	teader	- Product				Product	Tags	Inventory	Category		
						9		100				

For a more effective product search, there are search filters for *Product*, *Supplier* and *Category* located at the top of the Search and Product List. These filters allow the user to narrow the search for a specific product based on the desired criteria. In the example below, Titleist was selected in the supplier filter. Applying this filter will display only items that have Titleist as the supplier.

Inv	entory			Prophet S	lystems Inve	ntory Manage	ment			
Products	roducts by Supplier	Suppliers	Sales Rep	Purchase Orders	Gift Card	Rain Check	Packages	Modifier Setup	PO Builder Wizard	
Sear	ch & Product I	List				1	Product Info	rmation		
Product:		Go	Product Set	up Order Info	Tier Price A	dvanced Oth	r Item Modifiers	Notes S	KUs	
					1 1				1	
Supplier		ategory		Item Type: Pro		<u> </u>				
itleist	▼ [All]		<u> </u>	Supplier: Nik	e	-				
Sort by age 💽 As	ic 🕐 Desc 📔	Show All		Category: Clu	bs	•				
Show Discontinued It	ems									
Exclude Not In Stock	0 - 48	of 48 items	Pro	duct Code: 36	37	Char	ge Code			
ode	Description	1	<b></b> c	Description: Clu	b Glenn W					
292	Ball Logo			talog Cost:	\$449.97			Delete		
562	Hat Titleist	MLB		-						
564	Glove Title	ist Players Fle		Tax Code: 2	PA 5 🕶					
565		ist Perma Sof		clusive Price:						
885		Sports Mesh								
893		Contrast Sti		Retail Price:	\$449.97					
936 042		Stretch Mes								
079		tleist Folding Pink Ribbon			Mar			0.00		
080		Cubic Mesh	Track	Inventory:	Yes Pr	ceB: C	.00 Price C:	0.00 More Pri	ce	
083		Nxt Tour S .			Г	Zero Price R	T Zero	Price C		
085		ist Microfiber	Clone Ite	m						
086		Performanc.								
147	Bag Titleist	t Cart Bag 20	Cost Det	ail						
221		Ball Progra		\$449.	7 Units in stoc	< 0				
222		Ball Progra		, , , , , , , , , , , , , , , , , , , ,						
227		Ball Progra		\$449.9	97 Units on ord	er 0				
228		Ball Progra								
229		Uniforms	N				ceive Print Pr		Sale	
232	Giove Title	ist Cart Mitts	- Product	Cancel	Save D		ceive Print Pr oduct Tags		Category	

The search can then be narrowed even further by utilizing the Category search filter. In the example below, Accessories is applied in the category filter. Applying this filter, in combination with the Titleist supplier filter, will display only those items in the Accessories category with Titleist as the supplier.

I	nventory			Prophet Systems Inventory Management								
Products	Products by Supplier	Suppliers	Sales Rep	Purchase Orders	Gift Card	Rain Check	Packages	Modifier Setup	PO Builder Wizard			
S	earch & Prod	uct List				F	roduct Infor	mation				
Product:		9	Product Set	tup Order Info	Tier Price Ac	dvanced Other	Item Modifiers	Notes	SKUs			
Suppl	er	Cater		Item Type: Pro	duct	•						
Titleist	Acc	essories		Supplier: Tit	eist							
	🖲 Asc 🜔 Desc	Show All		Category: Ac	cessories	-						
Show Discontin		0 - 5 of 5 items	Pro	oduct Code: 40-	12	Change	Code					
Code	Descr		7	Description: Um	brella Titleist Fold	ding						
4042	Umbre	lla Titleist Folding		atalog Cost:	\$18.73			Delete				
4085 45201794794		Titleist Microfiber	-	Tax Code: 2	PA 5 -							
45201794794	43 Umbre	ella Titleist Single	Tax Ir	nclusive Price:								
45201794794	76 UGI to	owel		Retail Price:	\$29.99							
				,								
			Track	Inventory:	Yes Pri	се В: 0.0	O Price C:	0.00 More Pri	ce			
					Π :	Zero Price R	T Zero P	Price C				
			Clone It	em								
			Cost Det	ail								
			Ave Cost	\$18.	73 Units in stock	< 11						
			Last Cos	\$18.	73 Units on orde	er 0						
				- , - , - ,		,						
			New	Cancel	Save Di	scontinue	ive Print Pri	ice Physical	Sale			

Once the item appears in the Search & Product List, simply select the item and the details related to that item will appear in the Product Information field.

### Creating a New Inventory Item

When creating a new item in POSExpress, there are five required fields. They are *Item Type*, *Supplier*, *Category*, *Product Code*, and *Description*. An icon that looks like this, **()**, will appear next to any field that is missing required information. These five fields will be described in detail. The remaining fields; Catalog Cost, Tax Code, Tax Inclusive Price, Retail Price and Track Inventory will be briefly described.

To create a new item in the *Inventory* module, select the *New Product* button and a *Create New Product* window will replace the *Product Information* window. All fields will be Null, awaiting info to be entered related to the new item.

There are 13 Item Types to choose from. Below is the list and when you would select them.

- 1. **Admin Charge** when you are creating an item that will be used as part of the Admin Charge functionality
- 2. **Appointment** when you are creating an item that will be used in Lesson Book V3 module
- 3. Custom Bank Charge -
- F&B when you are creating an item that will be sold through the F&B module
- 5. **Membership Dues** when you are creating an item that is sold but revenue is deferred. This also enables an additional tab (Dues) on the item level that requires information to be filled out.
- 6. **Other Dues** same as Membership Dues. Just another way to separate Membership Dues and Other Dues.
- 7. **Product** when you are creating an item that will be sold through the proshop. Rule of thumb, when you are not sure what Item Type to use, select this one.
- 8. **Service Charge** when you are creating an item that will be used as part of the Service Charge functionality
- 9. **Smart Card** when you are creating an item that is considered a Punch Card. You will need to identify a quantity when using this Item Type. When a Smart Card item is sold, it allows the software to track how many times said item can be redeemed at a zero cost to the customer.
- 10. Smart Card Category -
- 11. **Teesheet** when you are creating an item that will be linked to a rate within Starterhut module. Examples are Greens Fee items, Cart Fee items
- 12. **Timer -**
- 13. **Tournament** when you are creating an item that would be linked back to a specific tournament customer account. When this

item is sold, it will increase the credit book of said account. Example is Prize Fund item

Inv	ventory		PO	Sexpress Inv	entorv Ma	nademe	nt	_	_	~
			, 0	ocxpress inv		lageme				/
Products	Products by Supplier	Suppliers	Sales Rep	Purchase Orders	Gift Card	Ra	in Check	Package	s Ma	difier
Sea	rch & Produc	t List			Cr	eate Nev	w Product			
Product:		Go	Product Setup	Order Info Tier P	rice Advance	Other	Modifiers	Notes		
Supplier		Category		Item Type: Pro	duct		•			
[AII]	- [AII]	19795	-	Supplier:			•			
📕 Sort by age 💿 -	Asc Decc Sh	ow Discontinued Ite								
	1		100	Category:						
Code	Descripti		_🚔 Pr	oduct Code:						
**** TO GO **		GO *****		Description:						
100 Club Event	Club Eve	nt				a 19				
100 G	Regrip		C	atalog Cost:	\$0.00	Size:				
100 K&Q	Rings and Personal	d Queens Even	<u>.</u>	Tax Code: n/a	Not 👻					
100 L				Tax Code: [h/a	Not 💌					
100 McG 100 Old Pal	Old Pal E	y Event Fee	Tax	Inclusive Price:		Season	Code:			
100 Old Pal 100 Opening Da		vent Fee Day Event Fee								
100 Opening Da 100 PC		's Cup Entry F		Retail Price:	\$0.00					
100 PC		Event Fee	6							
100 KM		League Fee								
1000 Island	1000 Isla		Trac	k Inventory:	Yes					
1001		Round 18 Holes	Aging \	/iew						
1002	Member	Round 9 Holes								
1018	Cart Fee	Member 18 Ho	),							
1019	Cart Fee	Member 9 Hol	e: Cost De	tail						
1019A	Corporat	e Non Member								
1020	Private C			Ave Cos	t	\$0.00	Units in st	ock 0		
1021	Private C	art 9		0.002			11.11			
1022	Guest Ro	und 9 Holes		Last Co:	t	\$0.00	Units on o	rder 0		
1025		rt Fee 9 Holes						. <u> </u>		
1026	Guest Gr	eens Fee 18 H	New		e Delete	Receive	Print	Physical	Sale	
10963	Cupet Cr	oon Eoo A Hold	Product	Cancel Sav	e Delete	Product	Price Tags	Inventory	Category	EXIT

# Creating a New Supplier

To create a new Supplier, go to the *Inventory* module and select the *Supplier* tab. Select the *New Supplier* button and the *Create New Supplier* window will be displayed. Enter the relative information accordingly and select *Save*. The new supplier will then be added to the *Search & Supplier List*.

If a supplier's information changes, it should be edited in POSExpress. To edit a supplier's information, first locate the supplier in the *Search & Supplier List*. Then, make any necessary changes and select *Save*.

I	nventory	POS	express Inven	tory Manag	gement			>
Products	Products by Supplier Supplier	s Sales Rep	Purchase Orders	Gift Card	Rain Ch	eck P	ackages	Modifier
S	earch & Supplier List			Creat	e New Su	upplier		
Supplier:	[	Go Supplier: Company:			•	Account # Terms:	: [	
Supplier Id	Supplier Name	Contact:	-			Terms Typ	e:	
28 27	Adams Adidas	Address:						
47 59	Ahead American Brand Golf	Postal:	Cit	cy:				
35	American Dry Goods	State:	Countr	y: United St	ates 👻			
37	Antigua							
26	Bridgestone	Email:						
38	Bushnell	WebSite:						
25	Callaway	- Location	-		18	-		
24	Cleveland	Phone:		Fax:				
50	CMC Golf	Sales Rep:			*	□ Can A	uto PO	
23	Cobra	<b>_</b> _						
49	Cutter & Buck	Title:	- F	irst:				
29	Ecco							
46	EP Pro	Init:	L	ast:				
22	Fairway & Greene	Address				_		
21	Foot Joy	Auuress						
20	Gear							
33	George Landis	Postal:		City:				
52	Global Tour Golf							
67	Gogie Girl	State:	Cou	intry:		<b>T</b>		
56	Golbal Tour Golf	Email:						
55	Golo/Front9,INC	Email:	1					-
19	Great Divider	Phone:		Cell Ph	one:		Fax:	
48	Greg Norman			-				·
18	Haas-Jordan	New						
58	Imperial Hats	Supplie	Cancel	Save	Dele	te		EXIT >

The Sales Rep field can only be populated by a Sales Rep that already exists in your database. In order to associate a Sales Rep to a Supplier, you must first add the Sales Rep. This is done by selecting the Sales Rep button at the top of the Inventory module and then choosing the New Sales Rep button at the bottom of the screen. This will open the Create New Sales Representative window and allow the user to enter the relative information.

#### Creating a New Sales Category

Each inventory item in POSExpress must belong to a corresponding Sales Category. Sales Categories enable the user to filter items more quickly, as well as organize and customize reports more effectively.

To create a new category, select the *Sales Category* button at the bottom of the Inventory module. The Sales Category screen will be displayed.

4	nventory		PO	Sexpress Inv	entory Mar	nagemen	t				>
Products	Products by Supplier	Suppliers	Sales Rep	Purchase Orders	Packages	ма	odifier				
S	earch & Produ	ct List		1	1		Crea	ite New	Product		
Product:		Go	Product Setup	Order Info Tier F	Price Advance	Other	Modifiers	Notes			
Suppl	er	Category		Item Type: Pro	duct		-		1		1
All]	▼ [All]	ourcigory	-	Supplier :			-				
Sort by age	🖲 Asc 💮 Desc 📃 S	how Discontinued Iter		Category:			-				
Code	Descrip	tion	P	oduct Code:			_				
(051	King of	Sweets Candy		Description:			_				
			-	atalog Cost:	0.00	Size:					
			-	Tax Code: N/	STOLAN.	oneon 1					
			E Tax	Inclusive Price:		Season (	ode:			-	
			-	Retail Price:	\$0.00	Beabon	Joue.	1			
			Trac	k Inventory:	Yes						
			Aging	/iew			_				
			Added	Mor	ith(s) First R	leceive Date			Rental		
			_								
			Cost De	4							
			COSCIDE	Ave Cos		\$0.00	Units in sta	0			
								1			
				Last Co	st	\$0.00	Units on or	der			
			New		Delete	Receive	Print	Physical Inventor	Sale		EXIT

#### Select Add

Accounting     Administrator tools     AutoUpdatePatchServer	Manage Sales Select category from	5		ate task.		-	-		
ClientDownloadFromCPS Credit Card/Gift Card	I Description	Loy	General Led	Discount	Charge	Min	Standard	Ex	Add
Customer Management Options     Employee     Extension     General Options     Global Options     Hardware/Receipt     Inventory Options     IPPF Settlement     Reference Tables     Report Options     Sales Options     ServerProductPath     ServerVersion     Statement	<ul> <li>Bottle Deposits</li> <li>Gady</li> <li>Gift Card</li> <li>Membership</li> <li>Pay Out</li> <li>Payment</li> <li>PREPAID</li> <li>Rental Charge</li> <li>Service Charge</li> <li>Shipping</li> </ul>	No No No No No No No No		Yes No Yes Yes Yes Yes Yes Yes Yes Yes Yes	Yes No Yes Yes Yes Yes Yes Yes Yes Yes	No No No No No No No No	0.0000 0.0000 0.0000 0.0000 0.0000 0.0000 0.0000 0.0000 0.0000 0.0000 0.0000 0.0000 0.0000	0.1 0.( 0.( 0.( 0.( 0.( 0.( 0.( 0.(	Edit Delete
	C Show in Customer I	nformatio						Þ	
Accounting									Clos

The screen shown below will be displayed.

ile View Tools Help Goto Option List		Sales Cate			-
		Seles Cate			
CN8     Color Code     Company     Coupon     Currency Exchange Rate     Customer Class     Customer Group     Customer Group     Customer Suffax Name     Customer Suffax Name     Customer Suffax Name     Customer Title Name     Customer Type     Department	ID: Description: Department: General Ledger: Group Type: Course: Type:	Test Category Marchandise	(e.g. Acces COGS GL: Inv GL: Ranking:	Itemizer Description	ion:
Discount Button Setup     Discount Reason     Gratuity     Item Kits     Location Code     Nationality Information     PMS Itemizer     Profit Center     Sales Category     Sales Referrals     Sales Types     Season Code	Strates approximation	unt le Charge er		Category	
- Tax - Terminal Information Web Store Departments - Report Options - Sales Options - ServerProductPath - ServerPresion - Statement	☐ Loyalty ☐ Min Eligible ☐ PrePaid ☐ Show in Cu:	tomer Information			

Enter an ID and Description for the new Sales Category. There are many other options within this screen, some may be relevant to your facility and some may not be. *The ID and description are the only required fields to create a new Sales Category.* 

This screen also contains three tabs, *General, Price Setting* and *Remote*. Again, these tabs contain options specific to this category and may or may not be relevant at your facility. Here is an explanation of each tab.

- General check box options for specific options on the sales category level. Anything changed here will apply to all items associated with said category. Below is a description for each check box option within the General tab.
  - a) Add Cart Icon to tee sheet if item is added on the POS screen - this will add the cart icon to the booked cell that was checked in through Starterhut module even if a cart was not selected within Starterhut.
  - b) **Ask for cart number when sale is finalize** you will be prompted to enter the cart number within the sales screen. This

will only add to the note of the sale and will not be part of the Cart Tracking functionality within Starterhut module

- c) Allow Discount in order to apply a discount to an item (manual, coupon, etc), the sales category of the item needs to set to allow discount.
- d) **Free Shipping** option is used for web store orders. Mainly for Gift Cards to be sold via the web store.
- e) **Allow Service Charge** option is used when you have the Service Charge functionality setup and you want all items in said category when sold to be part of the service charge calculation.
- f) Ball Dispenser option is used when your facility is setup with a range ball dispensing software package that CPS integrates with. Examples are Range Express, ERange and Range Servant.
- g) **Credit Book** option is used to identify all items associated with said category are Credit Book eligible and a customer can use credit book (if available) to purchase items.
- h) Allow to earn Visit Point option used as part of the software's loyalty program to earn points based on visits versus total purchase price of sale items.
- i) **Duty Free** sales tax exempt of items when being sold through web store.
- j) Guest Tracking Enabled needs to be enabled when facility would like to use the Guest Tracking feature.
- k) Issue Rain Check enabled when all items associated with said category can have a rain check issued and redeemed for them.
- Loyalty option used when all items associated with said category are part of the loyalty point earned when sold.
- m)**Min Eligible** used when facility has Food Minimums for their members. When checked, the software will calculate all items sold no matter the payment method by customer account from

the sold to field of Sales module to calculate what the Food Minimum Credit would be for each member.

- n) Show unit in stock only when unit in stock <= option is used for items you want to show number of units in stock for online when current units in stock for items associated with said category are <= number you enter into field.</li>
- o) Prepaid option is used to identify all items associated with said category are Prepaid eligible and a customer can use prepaid (if available) to purchase items.
- p) Show in Customer Information -
- q) Roll Up -
- r) AF membership -
- s) Electronic Signature -
- t) **Force sales note** option is used when an item associated with said category is sold, it will require the cashier to enter a sales note.
- u) Profit Center used for payroll vs sales reporting
- 2. **Price Setting** tier pricing based on customer class. This can be set as a Markdown dollar amount, Discount Percentage or Markup Percentage. Once again, anything changed here will apply to all items associated with said category.
- 3. **Remote** remote printing setup when a kitchen printer that chits would print to when orders from F&B are processed. This can either be setup by terminal or global, depending on the option selected in Tools>Options>Hardware/Receipt>Remote Printing. Once again, anything changed here will apply to all items associated with said category.

After completing the necessary and relative information, scroll to the bottom of the screen and select *Save*. Next, select *Close* and the software will return to the Inventory module. Select *Exit*. Leaving the *Inventory* module

allows the system to refresh and this will add the new Sales Category to the *Category* drop down menu.

### Product Codes & Descriptions

Each inventory item requires a product code and description. These pieces of information are left entirely up to the user to create. Both alpha and numeric characters are accepted in these two fields.

Typically, there are two theories used when creating product codes. A code can be created by the user, or the user can utilize the bar code that is provided by the supplier. An example would be an item that comes in various sizes, colors and styles but, they all have the same cost and retail price. In this scenario, the user could decide to create their own product code for ALL sizes, colors and styles *or* utilize the bar code that is provided by the supplier for each different size, color and style.

Using the first option, the user creates a code, means there would be one inventory item in the database for ALL the sizes, colors and styles. Basically, this is a "price point" philosophy. Meaning, it doesn't matter what size, color or style the item is because they are all the same cost and price. The inventory related to the specific size, color and style will be managed manually. In this case, the user would simply enter one generic product code in the product code field. This code would be used for all the items. Using the second option, the factory bar code is used, usually means there will be a separate item code for ALL the sizes, colors and styles. This is because the supplier typically provides a separate bar code for all sizes, colors and styles. There will be a separate item and code in inventory for all items. In this case, the user can scan or enter the bar code provided by the supplier into the product code field for each item. The inventory, as it relates to size, color and style, can be managed within the software.

### Remaining fields and brief descriptions

- **Catalog Cost** Enter the cost of the item. This will be used in certain reports as an option to calculate COGS.
- **Tax Code** Enter the applicable tax code. If the item is not taxable, select N/A.
- **Tax Inclusive Price (optional)** Enter the total price, *including tax*. The software will calculate the tax, using the applied tax code for the product. The price before tax will be displayed in the *Retail Price* field. This is an optional feature. It is not required to have a tax inclusive price.
- **Retail Price** Enter the retail price. The software will apply the applicable tax during the sales process.
- **Track Inventory** This is a toggle button that is changed simply by clicking on it. Think of this option as a question. When you do your physical inventory count, is this item part of the count Yes or No?

\*\*\*Both options, Yes and No, enable the user to retrieve sales information. This option is specifically for physical inventory purposes only\*\*\*

# Gift Cards

Once a gift card is issued, it is listed in the *Gift Card* window, within the *Inventory* module. Here the user is able to view the current balance, card history, reset or disable a card, as well as make any necessary edits.

# Gift Card Search

To search for a gift card, enter the gift card number or the name to whom the card was issued into the *Search & Gift Card List*. When the card appears in the list, select it. The details associated with that card will be displayed in the *Card Information* window. See example below.

Inv	ventory	P	OSexpress Invei	ntory (	lanagem	ent		>
Products	Products by Supplier Suppliers	Sales Rep	Purchase Orders	Gift (	Card I	Rain Check	Packages	Modifier
Sear	ch & Gift Card List				Card In	formation	К	
Gift Card: t	est	Go	Card					- [
			Card Number:	1234	567890			Change Code
Card Status:	)pen 💽		Holder Name:	Test,	Customer			1
Code	Holder		Amount:		\$50.00	Card His	tory	
1106-000229	Southwoods Surgery	Cente		-				
1106-000230	Southwoods Surgery		Current Balance:		\$50.00			
1106-000231	Southwoods Surgery	Cente						
1106-000232	Southwoods Surgery	Cente	N 17 N 1					
1106-000233	Southwoods Surgery	Cente	Update gift card					
1106-000234	Southwoods Surgery	Cente	Card Details					
1234567890	Test, Customer		Created Date:		8/7/2009			
977230	Pin Shot		created bate.		18/1/2009			
977231	Pin Shot		Last Updated	Date:	8/7/2009			
977232	Pin Shot		Last opaatoa	D'ator	10/1/2005			
977233	Pin Shot				□ Discont	inued?		
977234	Pin Shot					17 48 AD48 1994		
977235	Pin Shot				1			
977236	Pin Shot		Expired Date:		1/ 1/20	99 👻		
977237 977238	Pin Shot Pin Shot				1			
977238	Pin Shot							
977240	Pin Shot							
977240	Pin Shot							
977242	Pin Shot							
977243	Pin Shot							
77044	Din Shot							
3								
	Recalc Gift	Card			Disabl	Reset		

# Creating a New Card Using the Gift Card Window

Typically, a new gift card is issued by selling it to a customer through the Sales screen. POSExpress also allows the user to create a card on the *Gift Card* screen in *Inventory*.

To issue a gift card manually, without using the sales screen, select the *New Card* button. The *Create New Card* window will appear. Enter the card number, holder name, and amount, and select *Save*. The card will now be active and available for use. The new gift card will also now appear in the *Search & Gift Card List*.

Ir	iventory	P	OSexpress Inver	ntory	Managen	nent		Ì
Products	Products by Supplier Suppliers	Sales Rep	Purchase Orders	Gift	Card	Rain Check	Packages	Modifier
Se	arch & Gift Card List				Card In	formation		1
Gift Card:		Go	Card Card Number:	7777	777777			Change Code
	Open 🗾			Test,	Customer	•		
Code	Holder		Amount:	1	\$50.00	[	1	
977231	Pin Shot				\$00.00	Card Hist	ory	
977231	Pin Shot		Current Balance:		\$50.00			
977233	Pin Shot							
977234	Pin Shot							
977235	Pin Shot		Update gift card					
977236	Pin Shot		Card Details					
977237	Pin Shot							
977238	Pin Shot		Created Date:		8/7/2009			
977239	Pin Shot				1			
977240	Pin Shot		Last Updated	Date:	8/7/2009			
977241	Pin Shot				C Discont	ripund2		
977242	Pin Shot				I Discon	inueur		
977243	Pin Shot							
977244	Pin Shot		Expired Date:		1/ 1/00	99 🔹		
977245	Pin Shot		expired Date:		1/ 1/20	99 🗾		
977246	Pin Shot		*					()
977247	1st Place							
977248	1st Place							
977249	1st Place							
977250	1st Place							
7777777777	Test, Customer							
				_				
	Recalc Gift	Card		-	Disab	le Reset Gift		

# Resetting a Gift Card

After the value of a card has been completely redeemed, or the card has expired, it can be reset. Resetting the card means that the information that was associated with the card, the holder name, the expiration date and any amount that may be left on it, will be erased. This allows the user to reuse the gift card. Each time a card is fully redeemed or expires, it is suggested that the card be reset and used again.

To reset a gift card, first locate the gift card in the *Search & Gift Card List*. Next, select *Reset Gift Card*. See example below. This will erase any information associated with that card and allow the card to be issued again. In the Report module of POSExpress, there are various Gift Card reports. Resetting a gift card *will not* remove the history of the gift card from the Gift Card History Report. The user is still able to see the entire life history of the gift card by using this report.

In	ventory		PC	Sexpress Inver	ntory .	Managei	nent		)
Products	Products by Supplier	Suppliers	Sales Rep	Purchase Orders	Gift	Card	Rain Check	Packages	Modifier
Sea	irch & Gift Ca	ard List		a 11		Card I	nformation		4
Gift Card:	All	Gc		Card Card Number: Holder Name:	100000000000000000000000000000000000000	111111 Custome	er.		Change Code
Code	Holder			Amount:		\$50.00	Card His	tory	
	Test, Cus Test, Cus			Current Balance:		\$50.00	L		
12345 1106-000014 1106-000015 1106-000016	Southwoo Southwoo	ids Surgery Cer ids Surgery Cer ids Surgery Cer	te te	Update gift card					
106-000017 106-000018 106-000019	Southwoo Southwoo	ids Surgery Cer ids Surgery Cer ids Surgery Cer	te te	Created Date: Last Updated		8/7/200			
L106-000020 L106-000021 L106-000022	Southwoo	ids Surgery Cer ids Surgery Cer ids Surgery Cer	te	Last opuated	Date.	Discor			
L106-000023 L106-000024 L106-000025	Southwoo Southwoo Southwoo	ids Surgery Cer ids Surgery Cer ids Surgery Cer	te te te	Expired Date:		1/ 1/2	099 💌		
106-000026 106-000028 106-000029	Southwoo Southwoo	ids Surgery Cer ids Surgery Cer ids Surgery Cer ids Surgery Cer	te te	1					
1106-000030 1106-000031 1106-000032	Southwoo Southwoo	ids Surgery Cer ids Surgery Cer ids Surgery Cer	ti ti						
		Recalc Gift Car				Enab	Reset		

# Disabling / Enabling a Gift Card

POSExpress allows the user to disable a gift card. This may be done if a valued customer reports that a card is missing or stolen. If that card is recovered, it can then be enabled.

To disable a gift card, enter the *Gift Card* tab in the *Inventory* module. Use the search filter to locate the gift card that will be disabled. Once located, select the card from the *Search & Gift Card List*, and select *Disable Card*. This will disable the card from being used. It will not delete it from the system.

To view the disabled card, select *Discontinued* from the *Card Status* drop down menu in the *Search & Gift Card List*. To enable the gift card again, select the card in the *Search & Gift Card List* and select the *Enable Card* button. The *Enable Card* button will take the place of the *Disable Card* button when viewing discontinued cards.

I	iventory		PC	)Sexpress Inver	ntory	Manager	nent		Ì		
Products	Products by Suppliers Sales Rep Purchase Gift Card Rain Check Pac					Packages	Modifier				
Se	arch & Gift Ca	ard List		Card Information							
Gift Card:	· · · · · ·	Go		Card	-				F		
				Card Number:	1111	111111			Change Code		
	Open			Holder Name:	Test	, Custome	r				
Code	Holder			Amount:		\$50.00	Card His	tory			
Ĺ	tom anne	ss			_						
1111111111	Test, Cus	tomer		Current Balance:		\$50.00					
106-000014		ods Surgery Cer									
106-000015	Southwoo	ods Surgery Cer	te	Update gift card							
106-000016		ods Surgery Cer		upuate gint caru							
106-000017		ods Surgery Cer		Card Details							
106-000018		ods Surgery Cer		Created Date:		8/7/2009	8.				
1106-000019		ods Surgery Cer		croated bater		10/1/2009					
1106-000020		ods Surgery Cer		Last Updated	Date:	8/7/2009					
1106-000021		ods Surgery Cer		THE COLOR DATE AND A COLOR	2,200	10, 17 2000					
1106-000022		ods Surgery Cer				☐ Discon	tinued?				
106-000023		ods Surgery Cer					29 Y 48 Y 49 Y 49 Y 49 Y 49 Y 49 Y 49 Y 4				
106-000024		ods Surgery Cer									
106-000025		ods Surgery Cer		Expired Date:		1/ 1/20	99 🔹				
106-000026		ods Surgery Cer ods Surgery Cer		CORMONISTIC (FIGTO)			kassa				
106-000028											
106-000029		ods Surgery Cer ods Surgery Cer									
106-000030		ods Surgery Cer ods Surgery Cer									
106-000031		ods Surgery Cer ods Surgery Cer									
106-000032		ods Surgery Cer ods Surgery Cer									
1106-000033		ods Surgery Cer									
Constanting of the second seco	Control of										
		Recalc Gift Car	d Ne			Disab	Reset				

# View Gift Card History

To view the history of a gift card, including initializations, redemptions, deletions and any other transactions, use the Gift Card History feature. Enter the *Gift Card* tab under the *Inventory* module, and locate the gift card in the *Search & Gift Card List*.

Select the *Card History* button and the *Gift Card History* window will appear. This will display the card holder name, number, balance, and a list of transactions for the card. To view a specific transaction in the list, select *View*. This will open a Sale Look Up window that contains all information related to that specific transaction.

11	ventory				POSexpress Inventory Management							
Products	Products by Supplier	5	Suppliers	Sales	Rep Pu	Packages	Modifier					
Sea	arch & Gift (	Card	List		Card Information							
Gift Card:			Go		Ca Car	rd d Number :	777777777	~			Change Code	
	Open		<u> </u>		Hol	der Name:	Test, Custo	mer		-		
Code	Holder					Amount	\$50.	00 Car	d History			
L	tom ann	ess			-	104 X	r					
100	Mrs. Ha	Giff	Card His	tory				_			×	
106-000002	Ferrant		. ourum.								~	
106-000003	Ferrant								r			
106-000004	Ferrant	Cari	d Number:	777	7777777			Current Ba	alance:	\$50.00		
106-000006	Ferrant Ferrant	Can	d Holder Nan	ne: Test	t. Customer						3/0	
106-000010	Ferrant	Can	a noider Nan	165	, cascomer							
106-000012	Ferrant	Note	es									
106-000013	-	0.0	ard History									
106-000014	Southw	GILC	aru History									
106-000015	Southw											
106-000016	Southw	U	Dat	te	Descript	ion	Holder Name	Amount	Balance	View		
106-000017	Southw	•	8/7/2009 1	2:47 PM	Initialize I	lew	Test, Customer	\$50.00	\$50.00	View		
106-000018	Southv	-		1				Welchow own				
106-000019	Southw		8/7/2009	1:04 PM	Redeemed G	ft Card	Test, Customer	\$22.42	\$27.58	View		
106-000020	Southy		8/7/2009	1-09 DM	Deleted (	ard	Test, Customer	\$0.00	\$0.00	View		
106-000021	Southw		5,7,2005		Deletad C				40.00	. 10 11		
106-000022	Southw	1	8/7/2009	1:49 PM	Initialize I	vew .	Test, Customer	\$50.00	\$50.00	View		
106-000023	Southw	-	0/7/0000	1.50 044	Deda-med C	a court		A7 47	\$42.53	(Can)		
106-000025	Southw		8/7/2009	T:25 HM	Redeemed G	in card	Test, Customer	\$7.47	\$42.53	View		
	100	*	-							-		
	100	1.000										
		1000										

# **Inventory Modifiers**

Creating a Modifier

To create general modifiers for items, (ex: extra cheese, meat temperature, etc). Navigate to the Inventory Module and select the Modifier button at the top of the screen.

	nventory		P	POSexpress Inventory Management							
Products	Products by Supplier	Suppliers	Sales Rep	Purchase Orders	Gift Card	Rain Check	Packages	Modifier			
S	earch & Modi	fier List			Mo	difier Details					
Search:			Go	Modifier Text:				< >			
C F&B	🔘 Pro	duct 💿 Al	11	Modifier Type:	Multiple Choic	e •					
Modifier Text	t			Modifier Item Type:		•					
				Help Text:	-			4			
				Help Text:							
				Help Text.				~			
				Help Text:	└ Invisible Mo └ Maximum #		▼ Force an answ	er			
			Mod	fier Choices			₽ Force an answ	er			
							Force an answ				
				fier Choices		of Answers					
				fier Choices		of Answers					
				fier Choices	Maximum #	of Answers	Charge To Item				

In the following example, a Modifier for temperature, rare – well, will be created.

In the *Modifier Text* field, enter the name of the Modifier that is being created. Example: Temperature.

- **Modifier Type** drop down menu contains the 5 different types of modifiers to choose from:
  - **Multiple Choice** selects only one choice from the list provided (ex: temperature or salad dressing)
    - This is the choice we would use for our example, because a piece of meat can only be one temperature.
  - **Drop Down** selects only one from drop down list provided
  - **Check List** selects multiple from list provided (ex: no tomato, no onion, no lettuce, etc.)
  - **Text** requires the user to type in instruction (ex: special requests)
  - **Pizza Toppings** creates list of toppings that can be applied to each side of a pizza, the whole pizza and/or extra toppings

- **Modifier Item Type** drop down menu is where it is determined if the modifier is associated with a Food & Beverage item (F&B) or a Product (Basic Inventory).
- **Help Text** field is displayed within the Modifier dialogue box when the modifier is displayed on the Sales screen. It will be used to clarify what the modifier is used for, etc.
- Invisible Modifier (Recipe) will not show the modifier when the item is selected on the sales screen. This feature is used to create recipes for kitchen staff.
- Force an Answer requires the user to select an answer to continue moving forward with the order.

Modifier Te	xt: Temperature	*	
Modifier Type:	Multiple Choice	☐ Deplete Inventory Only	
Modifier Item Type:	F&B 💌	🗖 Roll up Price	
Help Text:	Please Select A Preferred Temperature	Cooking	
Invisible Modifier (Recip	be) 🔽 Force an ar	nswer 🗌 Meat Temp	
Maximum # of Answer	s	Show Modifier: Both	-
Assign to Category	¥1		
Category:	<u>.</u>	Assign Unassign	

#### Example of a Modifier for Temperature:

# Adding Choices to a Modifier

Modifier Choices are the choices that will be displayed to the server as part of a specific Modifier. For Example, if a Modifier for temperature is created, the choices may be: Rare, Medium Rare, Medium, Medium Well and Well Done. This next section will provide instruction for creating Modifier Choices.

1	nventory			Prophet Sy	stems Inven	tory Managei	ment		
Products	Products by Supplier	Suppliers	Sales Rep	Purchase Orders	Gift Card	Rain Check	Packages	Modifier Setup	PO Builder Wizard
S	earch & Modil	fier List				M	lodifier Details	2	
Search:		Go		Modifier T	ext: Temperat	ure		-	
🔿 F&B	O Pro	luct • All		Modifier Type:	Multiple Choic		Deplete Invento	ory Only	
odifier Tex essing	-		Mo	difier Item Type:			Roll up Price	2000	
zza Toppin	js			Help Text:	Please Select Temperature	A Preferred Cod	oking	* *	
				ble Modifier (Reci	1. (A. )	Force an answe			
				num # of Answei	rs 🗌	Sho	w Modifier: Bot	h <u>-</u>	
				Category:		-	Assign U	nassign	
			-				. 9		
			Modifier	Choices					
			Choi	ce Text		Choice Type	Charge To Iter	n	
							-		
				Indicator for inactiv	/e item		(	Add Choice	Remove Choice(
			New		<u></u>	1			

- Select the *Add Choice* button located at the bottom of the Modifier page.
- A dialogue box will appear. Enter a choice for the specific modifier in the *Choice Text* field. In the example provided below, "rare" was used.
- Select the *Choice Type* drop down to assign what type of choice will be used for this modifier. "Text" will be most commonly used.
- The *Charge Item Code* drop down menu enables the user to select a product code from the current inventory list and add that item to the order. This item, and any applicable price, will be added to the price of the order.
  - For example, if an item called "American Cheese" exists in inventory with an item code of "AMCH" and a price 50 cents,

selecting AMCH in this field will charge 50 cents when this modifier is selected.

- Select *Default* to attach this item to the modifier automatically.
  - Example: If no meat temperature is requested, "medium" will be selected by default.
- Select *Active* to include this choice as an available option within the Modifier. If this option is unchecked, the choice will be removed from the list of choices within the Modifier.
- Once completed, select Save.

	Item Modifier	
Choice Text:	Rare	*
Choice Type:	Text	×
Charge Item Code:	Clear	
	Default     Show Modifier Online	
	□ Show Other Text	
	🔽 Active	
	Show Recommend	
	Recommend Text:	
Delete	Show Popup On Web	
		*
		*
3G Color: F	ont Color: Save	Cancel

Choice Text:	Medium	
Choice Type: harge Item Code:	Text  Clear	
	✓ Default ✓ Show Modifier Online □ Show Other Text	
	Active     Show Recommend     Recommend Text:	
Delete	Show Popup On Web	*
	<u></u>	*

After all the choices are entered, the Modifier Choices box will look like this:

Choice Text	Choice Type	Charge To Item	
Rare	Text		
Medium Rare	Text		_
Medium	Text		
Medium Well	Text		
Well	Text		

Note: The order of the modifiers can be changed by simply selecting the modifier you want to move, and then selecting the arrows to on the right, to move the choice up and down accordingly.

Select *Save* at the bottom of the screen, the Modifier appears in the Modifier list.

Searc	h & Modifier L	ist
Search:		Go
F&B	Product	• All
Modifier Text	2020	
Modifier Text Dressing Pizza Toppings Temperature		

### Linking a Modifier to an Inventory Item

After creating Modifiers, the Modifiers must then be linked to the associated inventory item. This link is what causes the Modifier to be displayed on the Sales screen when the inventory item is selected. This link is completed in the Inventory Module.

First, Select the Inventory module from the main screen. *The Search & Product List* will be displayed. Scroll or search through the list of products and select an item that will use a modifier. In the Example below, the product Hamburger, product code LHAMBRGR, is chosen. Once that product is selected, choose that specific item's Modifier tab.

Inven	tory			Prophe	et Systems Ii	nventory Ma	anageme	ent			
	ucts by oplier	Suppliers	Sales Rep	Purcha Order		ard Rain	Check	Packages	Modifier Setup	PO Builder Wizard	
Search a	& Product	t List					Produ	t Informati	ion	2	
Product:		Go	Product Setup	Drder Ir	nfo Tier Price	Advanced	Other	Item Modifiers	Notes	2	
Supplier		Category	It	em Type:	Product	· · ·					
[AII]	▼ [All]		-	Supplier:	Food	•					
Sort by age 💿 Asc 🔞	Darc										
Show Discontinued Items	Desc	Show All		Category:	Food	*					
Exclude Not In Stock			Prod	luct Code:	LHAMBRGR		Change	Code			
	1		10-10 C		Hamburger						
Code	Descriptio	on	-			5					
0011 0012	Chicken Pizza		Cata	alog Cost:	\$0.00				Delete		
0013	Hot Dog		1	Tax Code:	N/A Not •						
0014	Salad		Tax Incl	lusive Price:							
0015	Pepsi										
0016	Red Bull Bud Light		Re	stail Price:	\$10.00						
ADMINCHARGE	Admin Ch										
BankReject	ACH Reje	ction	Track I	nventory:	Yes						
CARTFEEAUCTION	Special C		_								
DeclareCashTips DEPOSITFEE	Declare C Deposit F										
ENTRANCEFEE	Entrance										
LATERETURNCHARGE											
OnlineHandlingFeeI		re Handling Fe									
OnlineInterShipping OnlineShippingItem		e Internationa. e Shipping Item			Month(s) Firs	t Receive Date	10	/9/2014	Rental		
RENTALCHARGE	Rental Ch										
SERVICECHARGE	Gratuity	large									
SURCHARGE	Surcharge		11								
TeeSheetRainCheck		at Rain Check	1 <b>1</b>								
LHAMBRGR	Special T Hamburge										
Enginerior	nambarga	-1									
			Clone Iten	n							
			Cost Detai	il							
			Ave Cost		\$0.00 Units in	stock 0					
			Last Cost		\$0.00 Units on	order 0					
			cost cost		dines office office	order lo					
			New	Canc	el Save	Discontinue	Receiv	e Print Pri	ce Physical	Sale	

This will open the Modifier screen, pictured below:

Inve	entory			Prophet Su	stems Inv	entorv N	lanaaem	ent			
			1						1		
Products P	roducts by Supplier	Suppliers	Sales Rep	Purchase Orders	Gift Card	Rai	n Check	Packages	Modifier Setup	PO Builder Wizard	
Searc	h & Produ	ict List					Produ	ct Informat	ion		
			Product	1			1		1		
Product:		Go	Setup	Order Info	Tier Price	Advanced	Other	Item Modifiers	Notes		
Supplier		Category							Add		
[AII]	• [All]		Modifier:					<u> </u>	Modifier		
📃 Sort by age 💿 As	e 🜔 Desc	Show All		Modifier Text		1	Modifier Type		Delete		
Show Discontinued Ite									Modifier		
Exclude Not In Stock			5					- Ch			
Code	Descrip	tion									
0011	Chicker								1		
0012	Pizza										
0013	Hot Do	g									
0014	Salad		Choice:	Choice Text			Choice Type	I	ndicator for inactive it	em	
0015	Pepsi		choice.								
0016	Red Bu										
0017	Bud Lig										
ADMINCHARGE	Admin			-							
BankReject	ACH Re			1. Contraction of the second s							
CARTFEEAUCTION	Specia	Cart									
DeclareCashTips	Declare	e Cash Tips							Preview		
DEPOSITFEE	Deposi	t Fee									
ENTRANCEFEE	Entran	ce Fee									
LATERETURNCHAR	GE Late re	turn charge									
		tore Handling Fe									
		tore Internationa									
OnlineShippingIter		tore Shipping Item									
RENTALCHARGE	Rental										
SERVICECHARGE	Gratuit										
SURCHARGE	Surcha										
TeeSheetRainChe		eet Rain Check									
TEETIMEAUCTION		Tee Time									
LHAMBRGR	Hambu										
a manager of t	. lambu	99									
			-Cost Detai								
			Cost Detai	6	-						
			Ave Cost	\$0.00	Units in sto	ock 0					
					-	readid.					
			Last Cost	\$0.00	Units on or	der 0					
			New				Recei	ve Print Pri		Sale	
			Product	Cancel	Save	Discontinu	Produ			Category	

For more detail, select the Modifier drop down box, pictured below:

Modifier:	Temperatu	ire		<u> </u>	Ade Modif	
2	Modifier Text		Modifier Type		Dele	
<u>3</u>	Temperature		Multiple Choice	e 📃	Modif	ier
Choice:	Choice Text		Choice Type		Indicator for in	nactive
choice:	Rare		Text			
4	Medium Rare		Text	I		
<b>_</b>	Medium Medium Well		Text Text			
	Well		Text	+		

- The Modifier drop down box will contain a list of all the Modifiers that have been created. Select the desired Modifier for this item (#1 above). The Temperature Modifier was selected for the Hamburger item.
- After selecting the desired Modifier, select *Add Modifier* (#2 above) and the selection will be placed in the *Modifier Text* box (#3 above).
- The choices associated with the Modifier can be previewed by selecting the Modifier that is displayed in the *Modifier Text* box. The choices for that specific Modifier will appear in the *Choice Text* box (#4 above).
- Select *Save* at the bottom of the screen to save the changes made.

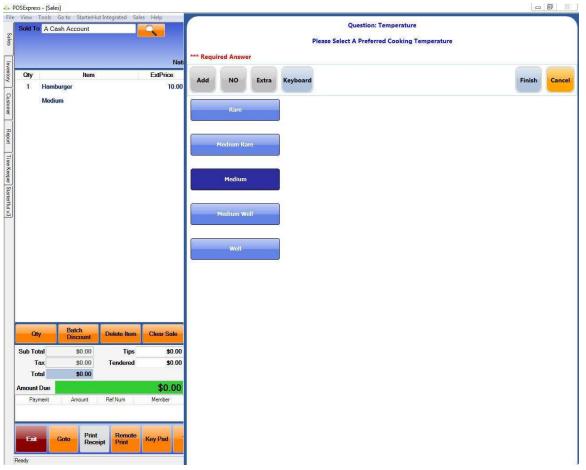
There may be an instance when more than one modifier is needed for a desired product. For Example, a hamburger may have a temperature modifier and a sandwich options modifier. To accomplish this, simply repeat the steps and add the additional modifiers. You can change the

display order of the Modifiers on the Sales screen by selecting the *Modifier Text* and moving it up or down using the arrow buttons.

#### Using the Modifiers During a Sales Transaction

After creating and saving the Modifiers, exit the Inventory Module and navigate to the Sales screen.

Select an inventory item that has a Modifier linked to it. Once selected, the Modifier screen will display. See the example below:



- Note: In this example, Medium was assigned as the default choice thus, it is dark blue. If a default had not been set, all choices would be light blue.
- Note: Because Force an answer was selected when creating the Temperature Modifier, "\*\*\*Required Answer" appears within Modifier

dialogue box. If that option was not selected, the user would have the ability to select "Next" and move forward without selecting a choice.

After a choice is selected, the Modifier dialogue box will disappear and the Modifiers choices will appear beneath the selected inventory item in a red font. In the example below, "Medium Well" was the selected choice of the Temperature Modifier.

Sold To A (	Cash Account			Acct 0							Sale No	0814	2014 10:48.3 10090001	34 AM
			Nation	ality United	States						PO#		Repr	int Sale
Qty 1 Han	lter nburger	n	ExtPrice 10.00	Sale		Retur	n	Smart Card	Payout	Gift Ca	ırd	Rain (	Check	Prepaid
Med	ium Well					F	Product Co	de		Price	Discount	Qty	Extende	d Price Tax (
				l.						\$0.00	0.00%	1		\$0.00 N//
				In stock or	ly				1			_		
				1	_	2	3	4					Level Up	Top Lev
Qty	Batch	Delete Item	Clear Sale											
Qty Sub Total	Batch Discount \$10.00		Clear Sale \$0.00											
Sub Total Tax	Discount \$10.00 \$0.00	Tips Tendered												
Sub Total Tax Total	Discount \$10.00	Tips Tendered	\$0.00 \$0.00											
Sub Total Tax	Discount \$10.00 \$0.00	Tips Tendered	\$0.00	Payment Me	sthods			Split Check						

• Note: If more than one Modifier is assigned to a product, select "Next" to move to the next Modifier and its options.

# **Remote Printing**

We can set up remote printing 2 ways either by Sales Category or per item at the item level

To setup remote printing by Sales Category, you will need to go to Tools/Options/Reference Tables/Sales Categories. Select the Remote Printing tab on each sale category you wish to print and pick the correct printer to add.

eneral Options  lobal Options  andheld Options  andheld Options  andheld Options  Descrip ardware/Receipt  Depart  Dep	ment: Service	•	g. Accessories, Carts) COGS GL: Inventory GL:	eneral Ledger Code	Current view
andicap Depart ardware/Receipt Depart ventory Options Genera eference Tables Group Block Item Category - Calendar - Color Code - Company - - Coupon	ment: Service	•	COGS GL:		
ardware/Receipt Depart iventory Options Gener: iosk Options Group eference Tables Group Block Item Category - Calendar - Color Code - Company - Coupon	I Ledger Code:	age 🔹	Inventory GL:		
nventory Options     Generalization       iosk Options     Group       efference Tables     Group       Block Item Category     -       - Calendar     -       - Color Code     -       - Company     -       - Coupon     -		age 🔹		T	
liosk Options Group eference Tables Group Block Item Category - Calendar - Color Code - Company - Coupon		age 🗾			*
- Block Item Category - Calendar - Color Code - Company - Coupon	Type:  Food and Bevera	age 🔄			
- Calendar - Color Code - Company - Coupon			Ranking:	1 🔅	
- Color Code - Company - Coupon				Itemizer Description	
Coupon					-
				Statement Display Option:	
				CONTRACTOR COLORADOR CONTRACTOR	1000
- Customer Class		Commission		Location	<u> </u>
- Customer Class - Customer Group	d Back: 0.000%				
Contract to the December 1	Code Tracking		🗆 Age Verific	ation	
Customer Occupations			772-2000 ( <del>2</del> 000-2000) (00-000-000)	00000000	
customer ricierence	e Tax over Tax Exempt		ip Line on Receipt	18 🔆	
Customer Student Status	e Full Receipt	Warning when yo	u discount below catalog	Cost	
Customer Suffix Name Customer Title Name	I Price Setting Remote Pri	nting			
Customer Type					
Department		all all			
	er Name:				▼ Add
Discount Reason	and contract I.				
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To setup remote printing at the item level, you will go into Inventory and find the item. On the Advanced Tab you will select 'Use Remote Printer at Item Level'.

Once this is saved, you will see the Remote Printer tab appear. You can set these items up on this tab to go to the correct printer

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# Smart Cards

POSExpress Smart Cards are electronic or virtual "cards" that are related to specific inventory items and are issued to individual customers for the purpose of tracking and counting the usage of that specific item. Typically, Smart Card inventory items are bundles or packages of an item that are presold at a discount. A common example would be "Get 5 for the price of 4" or "Buy 4 get 1 free". POSExpress allows the user to create an inventory item that will sell 6 pieces for the price of 5 and then have the ability to track the usage and redemption of each of the 6 pieces.

### Creating a Smart Card Inventory Item

To create a Smart Card item, go to the *Inventory* module and select *New Product*. From the *Item Type* drop down menu, select *Smart Card*.

Complete the remaining fields accordingly. Keep in mind that in this example of "buy 4 get 1 free", the retail price would be the price for 4 lessons. In the example below, "Golf Lessons – 5" was created.

	nventory			Prophet Sy	stems Inven	tory Managem	ent			
Products	Products by Supplier	Suppliers	Sales Rep	Purchase Orders	Gift Card	Rain Check	Packages	Modifier Setu	PO Builder Wizard	
9	earch & Produ	ct List				Creat	e New Produ	uct		
Product:		Go	Product Setu	p Order Info	Tier Price Ad	vanced Other	Item Modifiers	Notes S	mart Card	
Supp	lier	Category	I	em Type: Sma	rt Card	-			•	
All]	[All]		-	Supplier: Drink		-				
Sort by age Show Discontir	Asc Desc	Show All		Category: Serv	ice Charge	•				
Exclude Not In				luct Code: SCGI						
Code SCGL5	Descrip	tion ssons - 5		escription: Golf				Delete		
CGLO	Golf Les	5015 5		alog Cost:	0.00			Delete		
				lusive Price:						
			R	atail Price:	\$100.00					
			Track I	nventory:	No					
			AgingVie	w						
			Added		h(s) First Rece	eive Date		Rental		
			-							
			Clone Iter	a						
			Clone Iter Cost Deta							
			Colorestantication in the second seco		Units in stock	0				
			Cost Deta	il						

After the item is created, select the *Smart Card* tab. In the *Smart Card Qty* field, enter the total quantity that will be assigned to this Smart Card and select *Save*.

In the example below, 5 was entered because the product that was created is a bundle of 5 golf lessons. Remember, the price entered in the previous step was the price for 4 lessons. This is how the customer will receive 5 of these items for the price of 4.

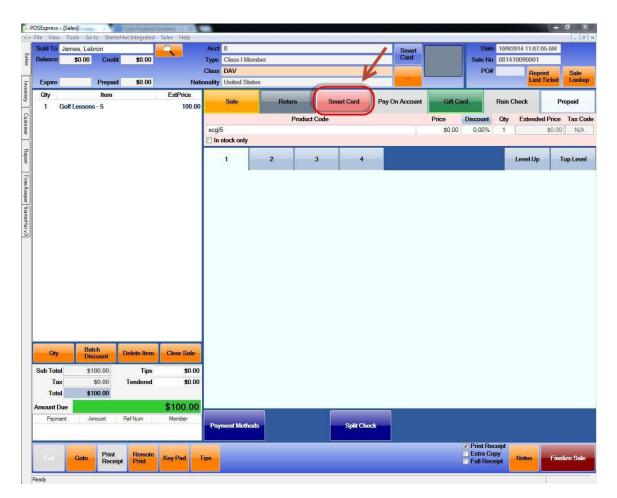
	nventory			Prophet S	ystems Inve	entory Mana	igemen	at 🛛			
roducts	Products by Supplier	Suppliers	Sales Rep	Purchase Orders	Gift Card	Rain Che	eck	Packages	Modifier Setu	PO Builder Wizard	
5	earch & Produ	ict List				C	Create [	Vew Produ	ict		1
roduct:		Go	Product Setup	Order Info	Tier Price	Advanced C	Other	Item Modifiers	Notes	Smart Card	
Supp		Category	Smart C	ard Qty: 5			>				
ll]	All]			em date range						T	
Show Disconti	ued Items	Show All	Fron	n date : 10/	9/2014 💌	To date : 10/	/ 9/2015	•			
Exclude Not In ode	Stock Descrip	tion									
CGL5		ssons - 5									
			Cost Deta	il	-		_				
			Aug 0 1								
			Ave Cost	\$0.0			_				
			Ave Cost Last Cost								

# Issuing a Smart Card

Once the Smart Card is created, it can now be sold to an individual customer. *Keep in mind, Smart Cards must be sold to a specific customer* <u>and cannot be sold to A Cash Account</u>. To issue a Smart Card, go to the *Sales* module and enter a specific customer in the *Sold To* field. Select the *Smart Card* tab. This will disable any QuickSale Buttons that are not associated to Smart Card inventory items. Smart Cards can also be assigned to a QuickSale Button. Please refer to the QuickSale Buttons guide for instruction.

Enter the product code of the Smart Card item by either selecting the assigned QuickSale Button or by entering the product code in the *Product Code* field. Select *Finalize Sale*. This will assign the Smart Card quantity that was given to this product to the specific customer. In the example

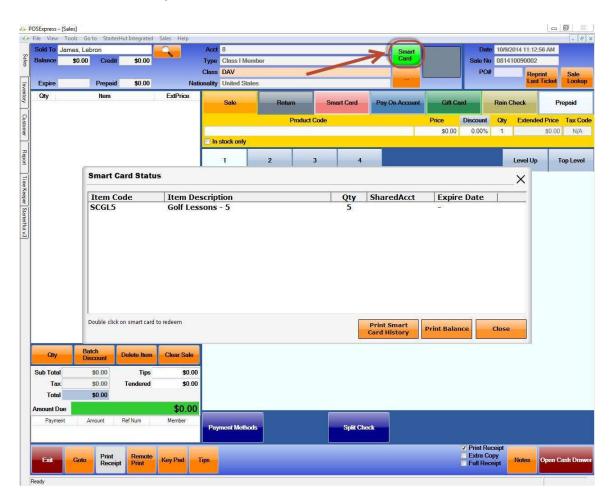
below, Test Customer has purchased 5 golf lessons for the price of 4. The 5 lessons have been assigned to the Test Customer account and can be seen on the Customer module.



# Redeeming a Smart Card

Once the Smart Card has been issued, it can now be redeemed by the customer that it was issued to. To redeem one of the Smart Card items, enter the customer's name in the *Sold To* field. A *Smart Card* button will appear. Selecting this button will display the *Smart Card Status* dialogue box. This box contains the available Smart Cards and their quantities for that customer. Selecting this button will also allow the user to check the balance of a customer Smart Card at any time. Just select the customer, click the *Smart Card* button, view the quantities and select *Close*.

See the below example:



Select the Smart Card item that is to be redeemed and it will be displayed in the sales list. The cost of the item will be \$0.00 because the item was prepaid in the previous step.

Sold To	James, Lebre	on			Acct	8						Smart			Date	10/9/2	2014 11:14	:21 AM	
Balance	\$0.00	Credit	\$0.00		Туре	Class I	Member	-				Card			Sale No	0814	10090002		
					Class	DAV									PO#		Rep	print	Sale
Expire	]	Prepaid	\$0.00	Na	tionality	United S	States										Las	t Ticket	Looku
Qty		ltem		ExtPrice		Sale		Retur		Smart Ca		0.4		Card		Rain (	Phanels .		
1 (	Golf Lessons	-5		0.0	0	Sale		Retur	•	Smart Ca		ay On Accour	Gili	Cald		Rain C	JNECK	PI	repaid
								F	Product Co	de			Price	Dis	scount	Qty	Extend	ed Price	Tax Co
													\$0.0	00	0.00%	1		\$0.00	N/A
					🗖 In	stock onl	ly .		_			_							
						1		2	3		4						Level Up	т	op Leve
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Select *Finalize Sale* and the transaction will process and reduce the Smart Card total quantity accordingly.

More than one Smart Card item can be redeemed within the same transaction. Simply select the item twice in the Smart Card Status dialogue box or increase the quantity in the sales list before finalizing the sale. For example, if a family wanted two members to take lessons at the same time, change the quantity to 2 and select *Finalize Sale*. This will reduce the Smart card total by two.

There are options within POSExpress that will allow the remaining Smart Card quantities to appear on the sales receipt after each Smart Card transaction. There are also Smart Card reports in the POSExpress Report module that will provide history, redemption, usage, etc.