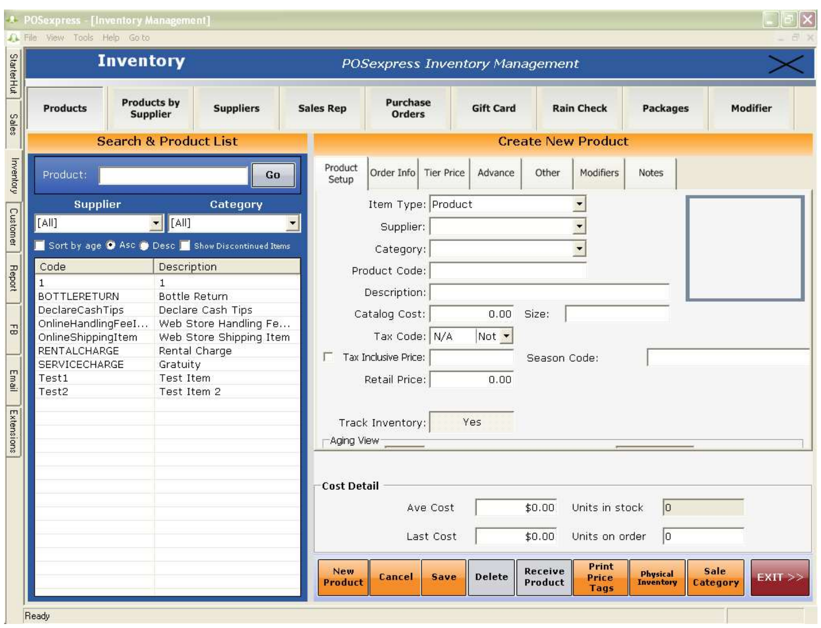
The Inventory Module

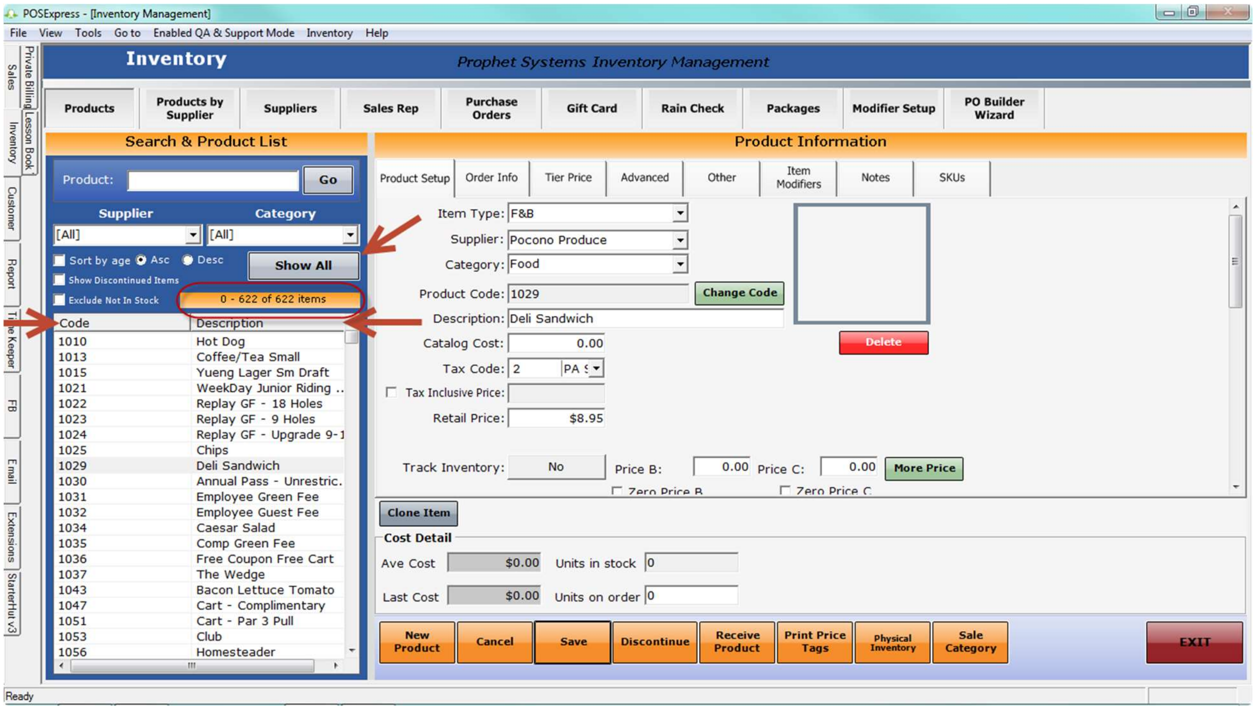
From the home screen of POSExpress, select the *Inventory* icon:

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.

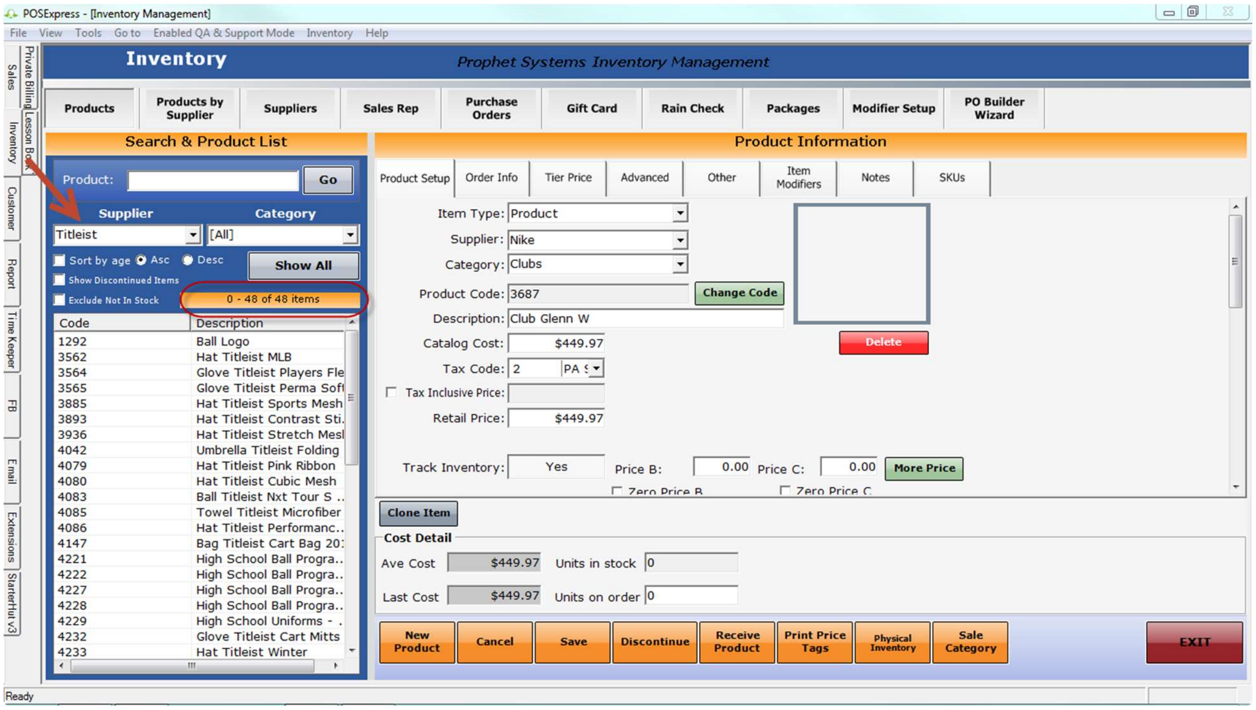
When opening the Inventory screen, the Products page is displayed. See the image below.



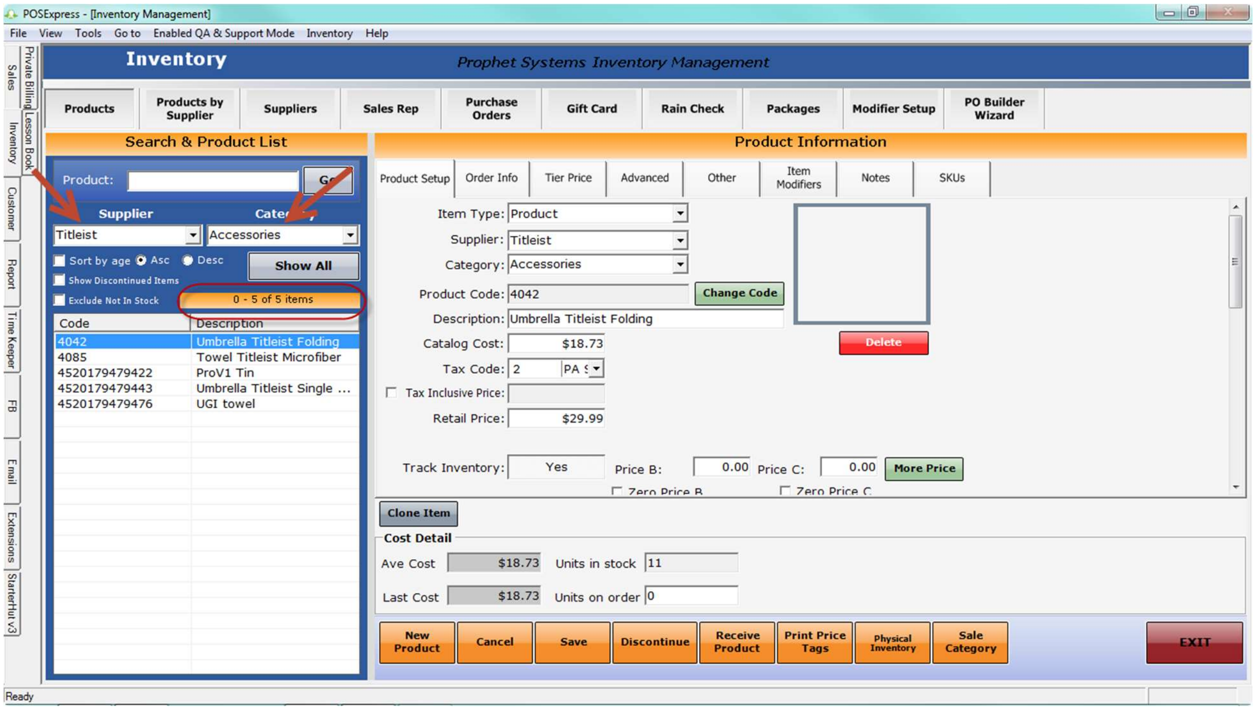
On this screen, there is a *Search & Product List* section. You can display all items in inventory by clicking the Show All button. If you would like the list of items to be in ascending order by Code or Description, simply click the column button. Click the column button again to have the items in descending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



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.



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.



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

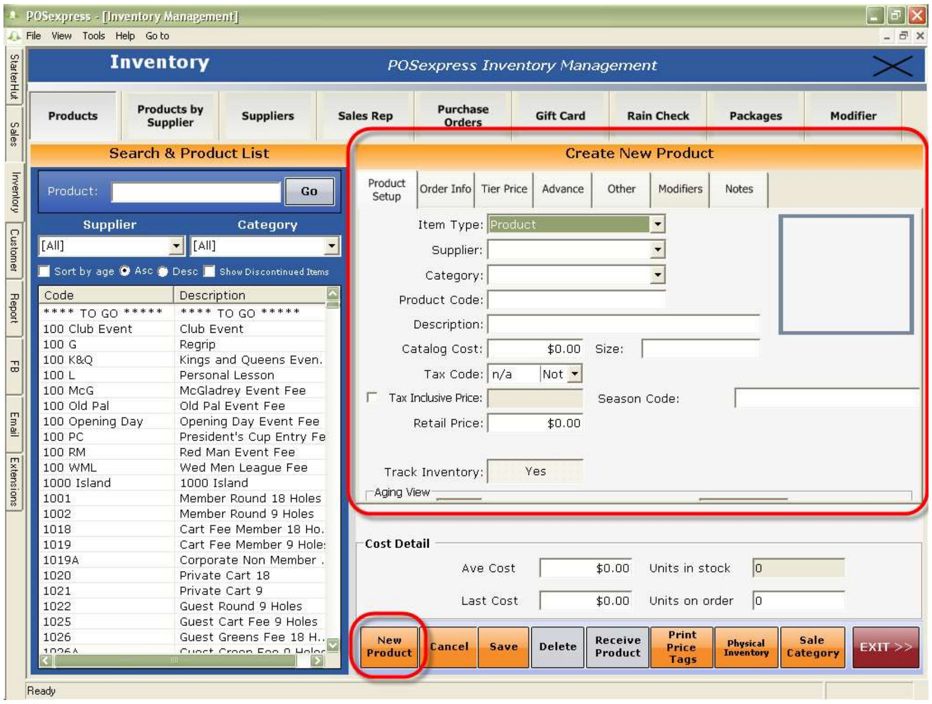
When creating a new item in POSExpress, there are five required fields. They are *Item Type*, *Supplier, Category, Product Code*, and *Description*. An icon that looks like this,  , will appear next to any field that is missing required information. These five fields will be described in detail. The 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** -
4. **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

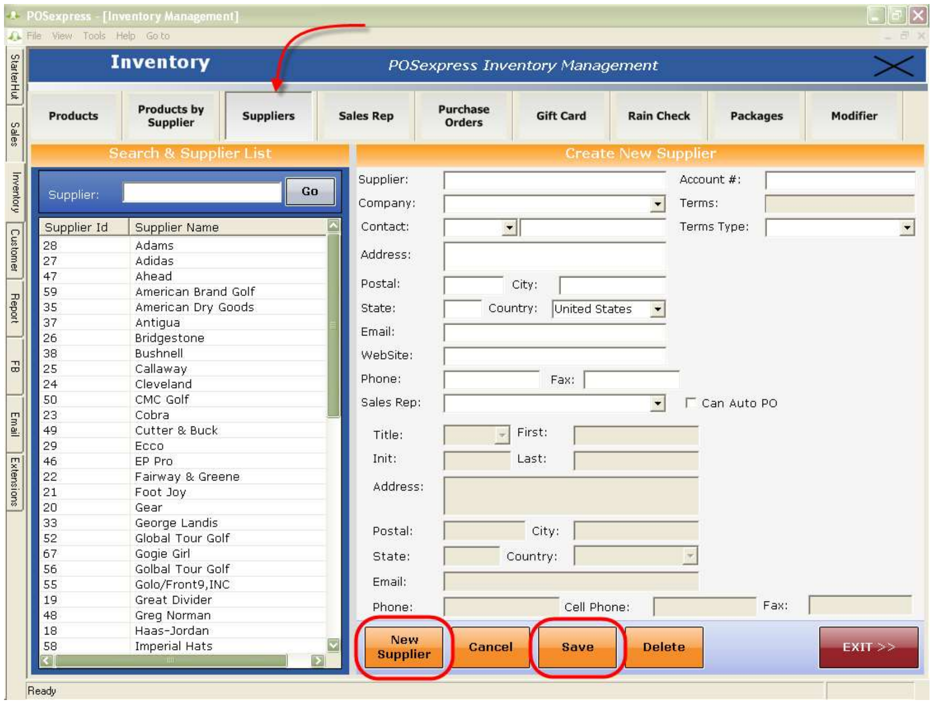
item is sold, it will increase the credit book of said account. Example is Prize Fund item



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*.

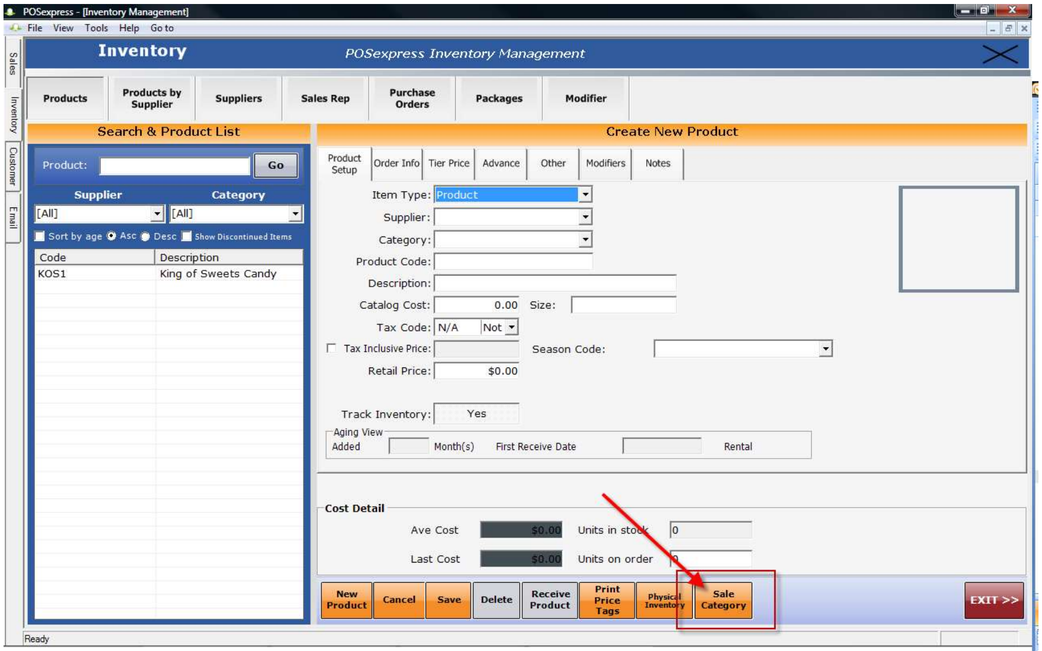


The *Sales Rep* field can only be populated by a Sales Rep that already exists in your database. *In order to associate a Sales Rep to a Supplier, you must first add the Sales Rep*. This is done by selecting the *Sales Rep* button at the top of the Inventory module and then choosing the *New Sales Rep* 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.

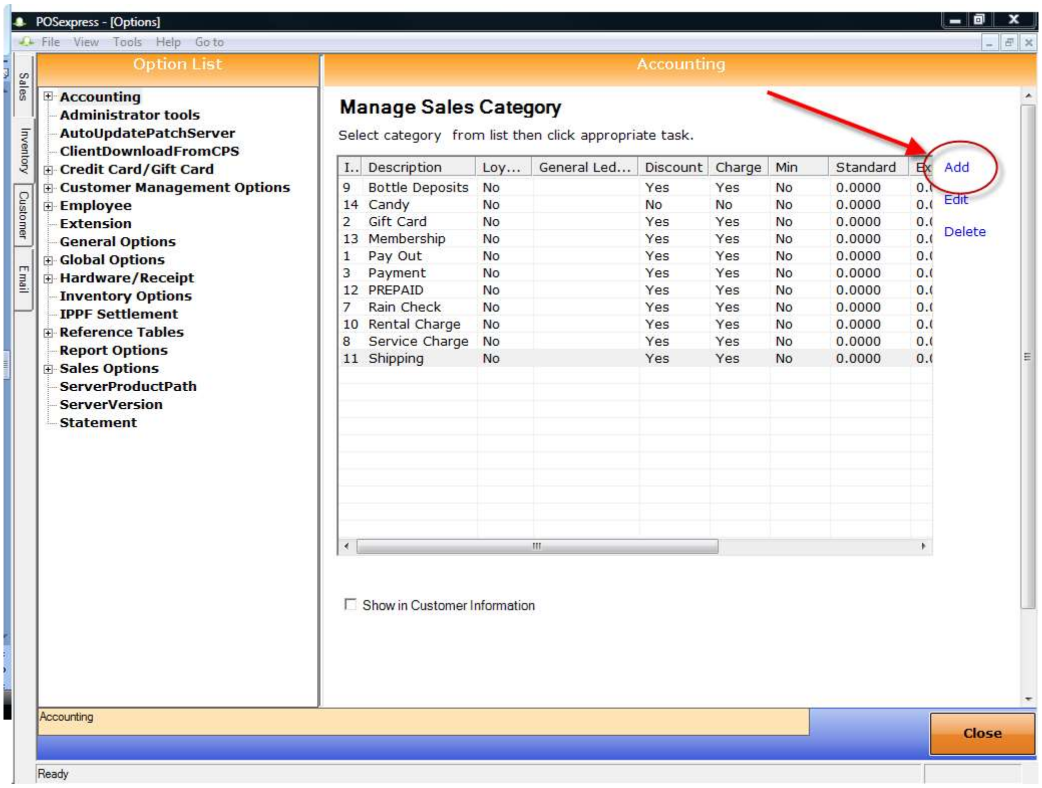
Creating a New Sales Category

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.

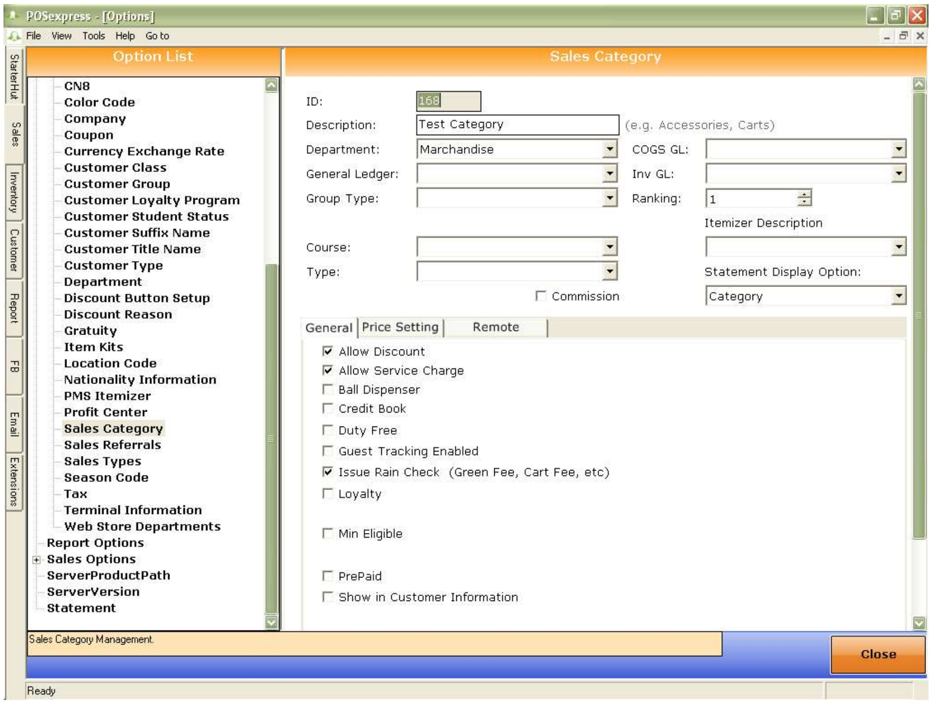
To create a new category, select the *Sales Category* button at the bottom of the Inventory module. The Sales Category screen will be displayed.



Select *Add*



The screen shown below will be displayed.



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.

1. **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.
l) **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.
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?

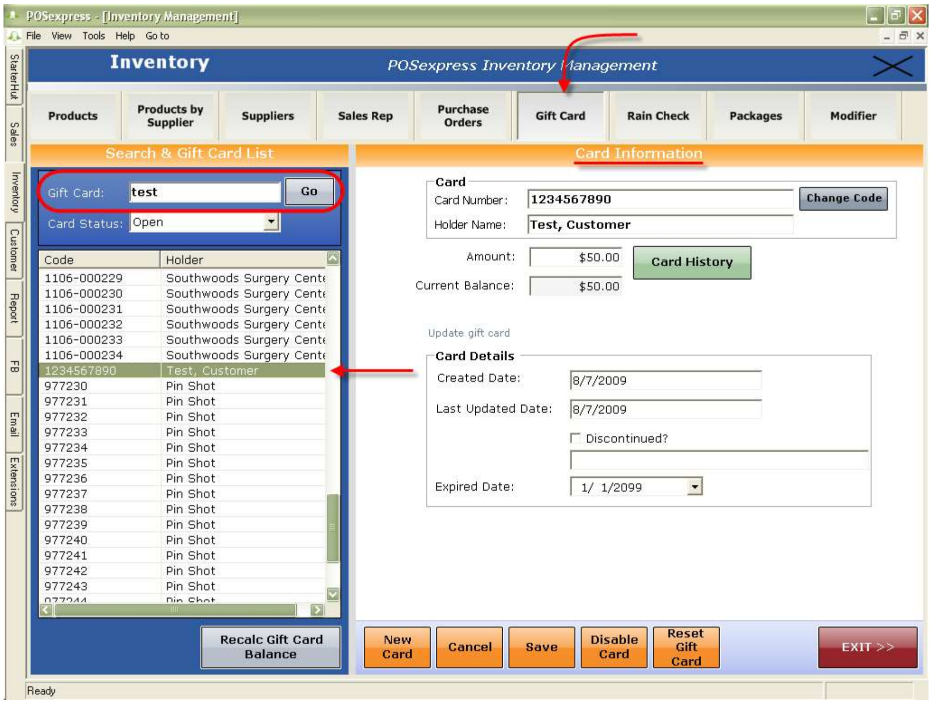
  ****Both options, Yes and No, enable the user to retrieve sales information. This option is specifically for physical inventory purposes only****

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

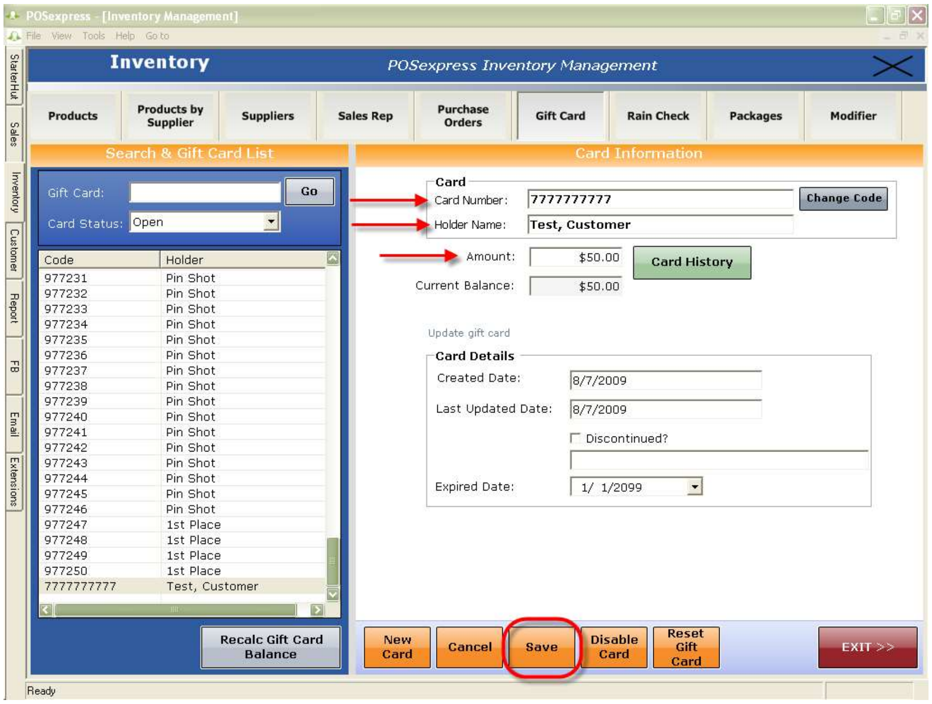
To search for a gift card, enter the gift card number or the name to whom the card was issued into the *Search & Gift Card List*. When the card appears in the list, select it. The details associated with that card will be displayed in the *Card Information* window. See example below.



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*.

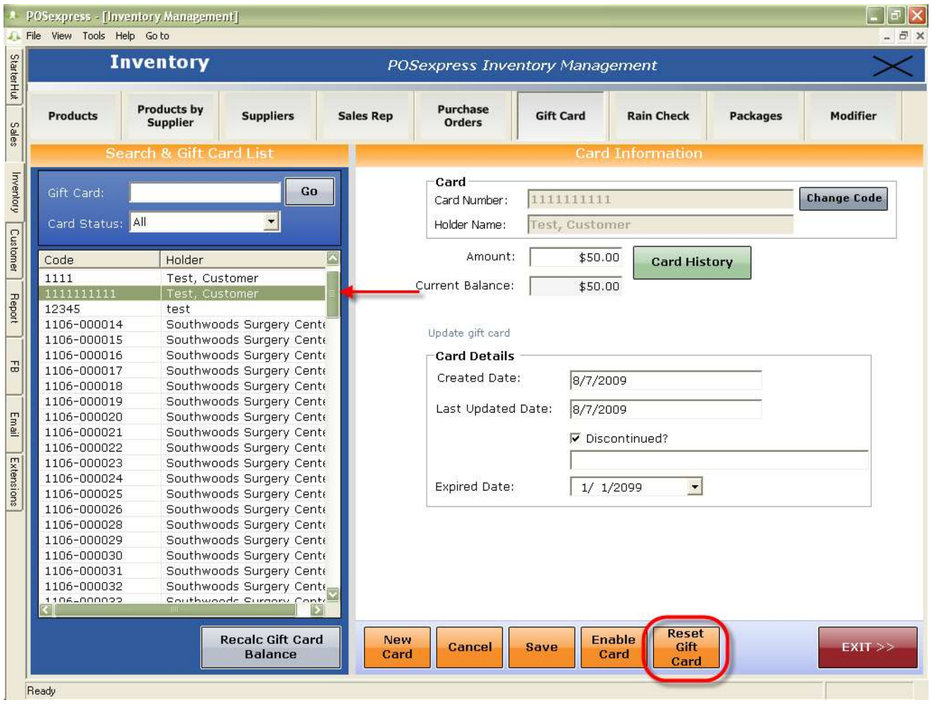
To issue a gift card manually, without using the sales screen, select the *New Card* button. The *Create New Card* window will appear. Enter the card number, holder name, and amount, and select *Save.* The card will now be active and available for use. The new gift card will also now appear in the *Search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



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.

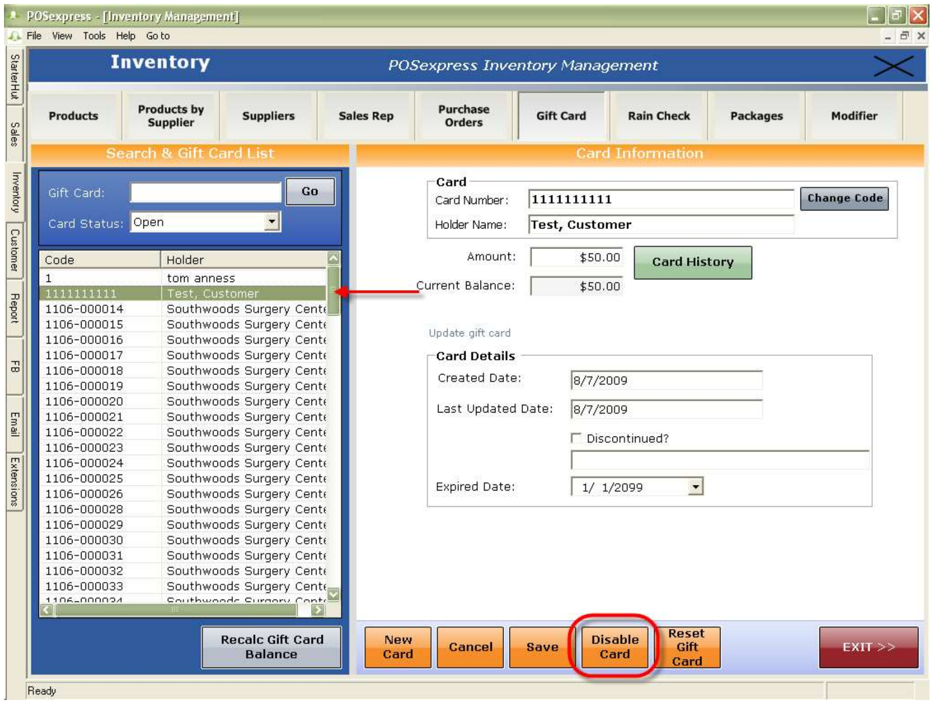


Disabling / Enabling a Gift Card

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.

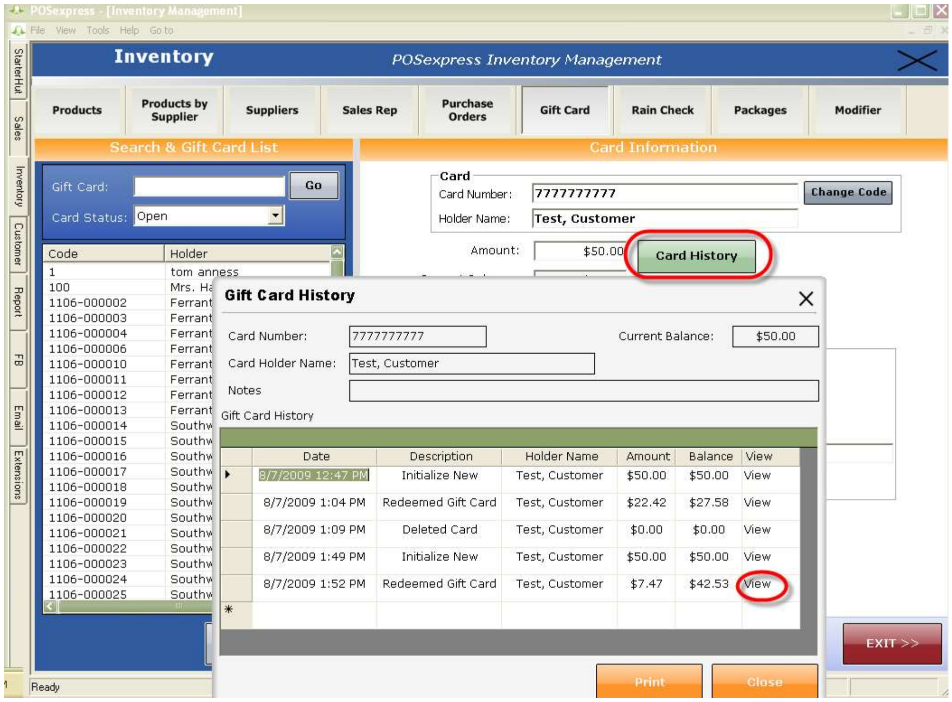
To view the disabled card, select *Discontinued* from the *Card Status* drop down menu in the *Search & Gift Card List*. To enable the gift card again, select the card in the *Search & Gift Card List* and select the *Enable Card* button. The *Enable Card* button will take the place of the *Disable Card*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



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*.

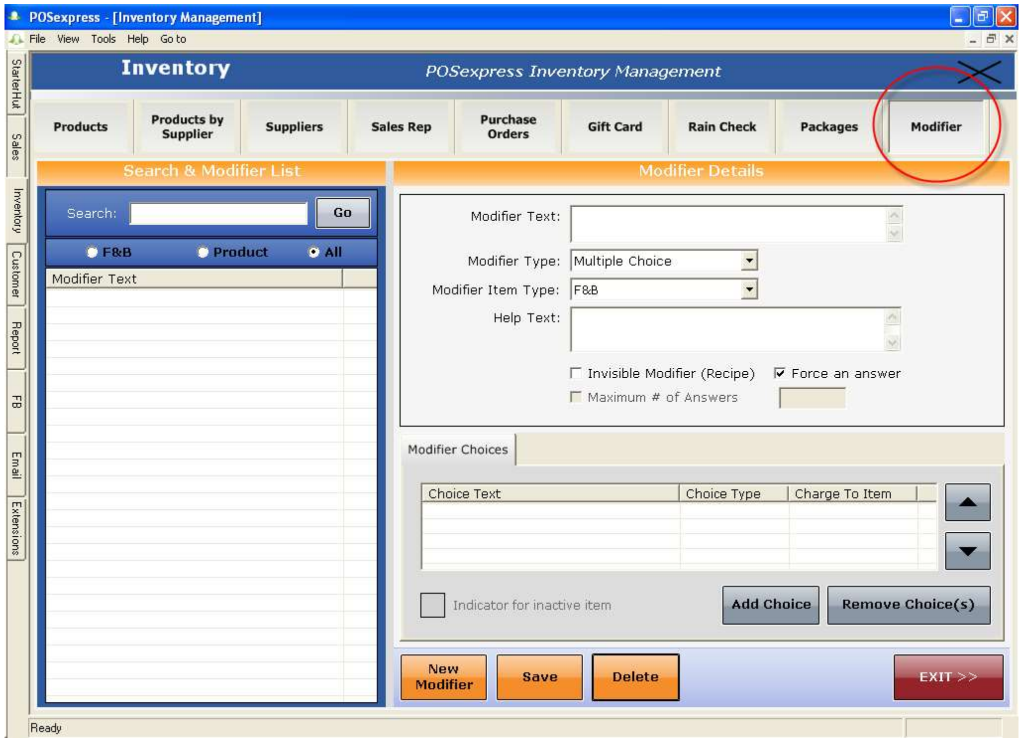
Select the *Card History* button and the *Gift Card History* window will appear. This will display the card holder name, number, balance, and a list of transactions for the card. To view a specific transaction in the list, select *View*. This will open a Sale Look Up window that contains all information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



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.

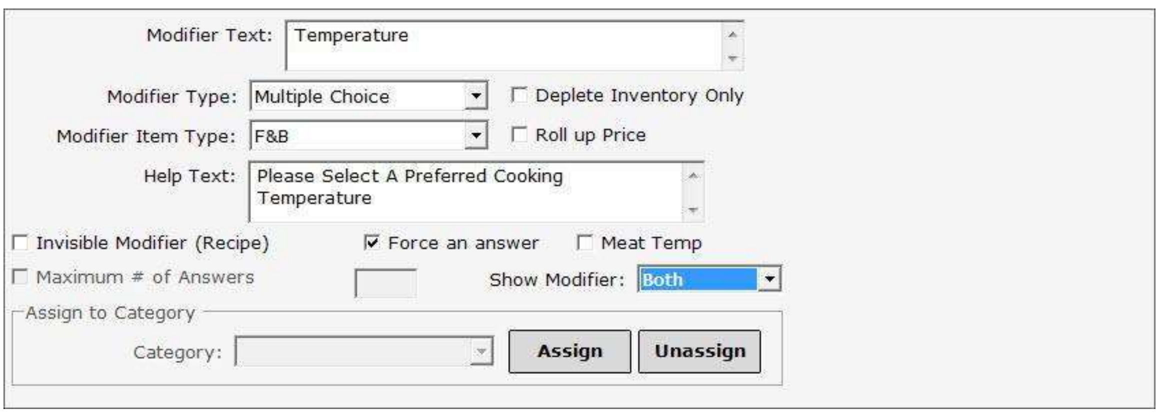


In the following example, a Modifier for temperature, rare – well, will be created.
In the *Modifier Text* field, enter the name of the Modifier that is being created. Example: Temperature.

- **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

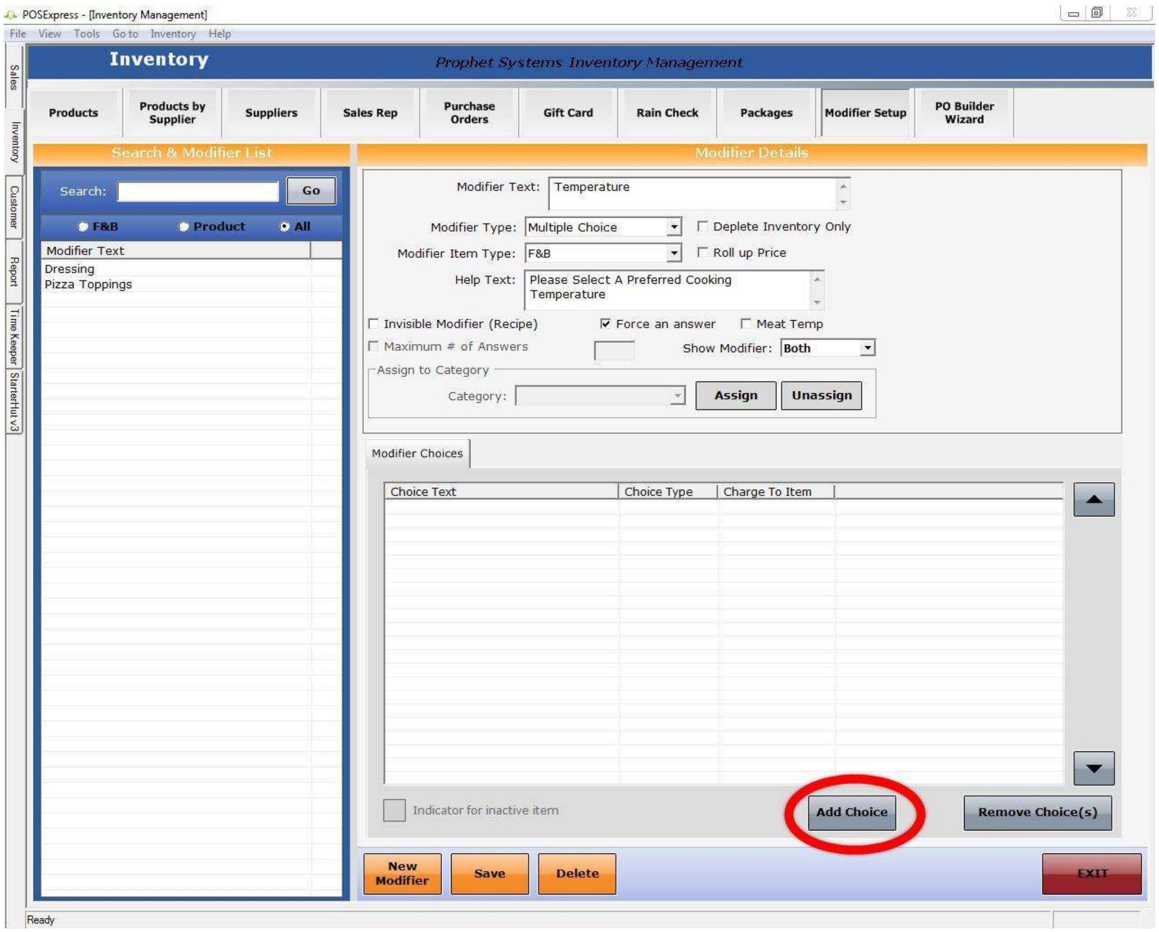
- **Modifier Item Type** - drop down menu is where it is determined if the modifier is associated with a Food & Beverage item (F&B) or a Product (Basic Inventory).
- **Help Text -** field is displayed within the Modifier dialogue box when the modifier is displayed on the Sales screen. It will be used 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.

Example of a Modifier for Temperature:



Adding Choices to a Modifier

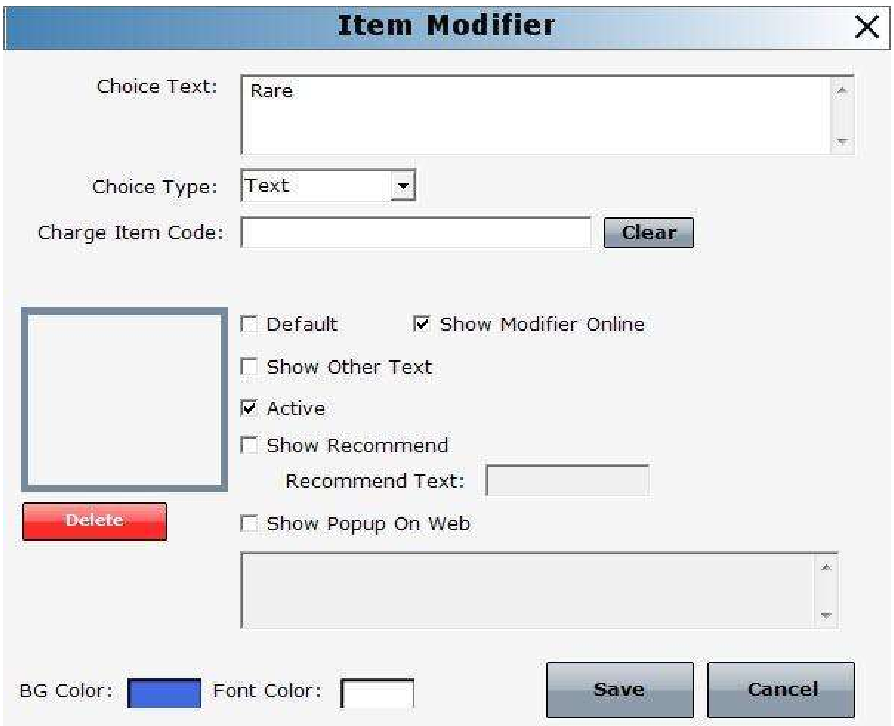
Modifier Choices are the choices that will be displayed to the server as part of a specific Modifier. For Example, if a Modifier for temperature is created, the choices may be: Rare, Medium Rare, Medium, Medium Well and Well Done. This next section will provide instruction for creating Modifier Choices.

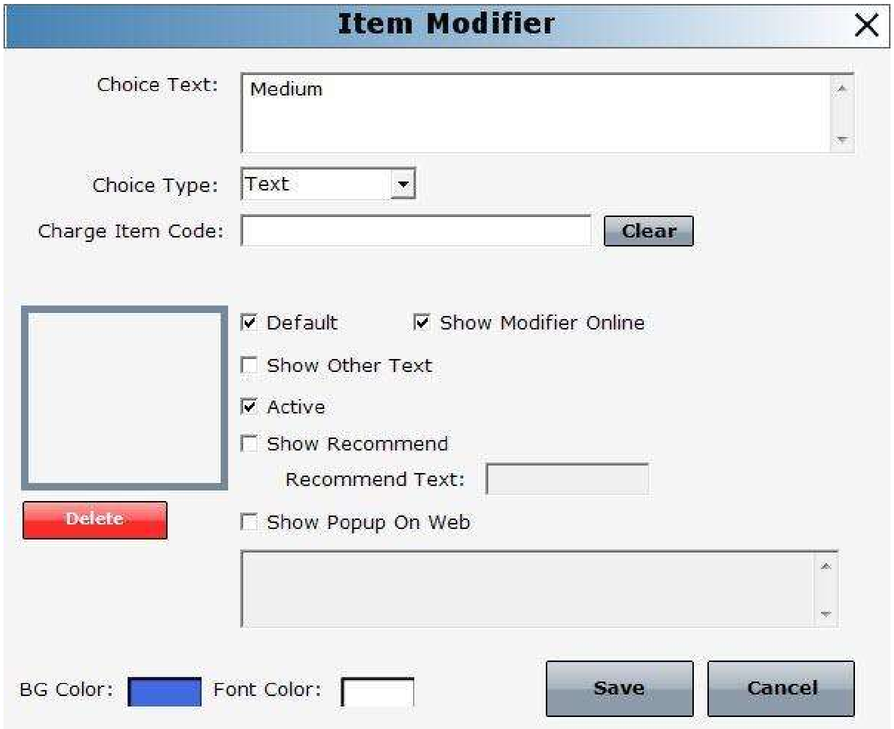


- Select the *Add Choice* button located at the bottom of the Modifier page.
- A dialogue box will appear. Enter a choice for the specific modifier in the *Choice Text* field. In the example provided below, “rare” was used.
- Select the *Choice Type* drop down to assign what type of choice will be used 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,

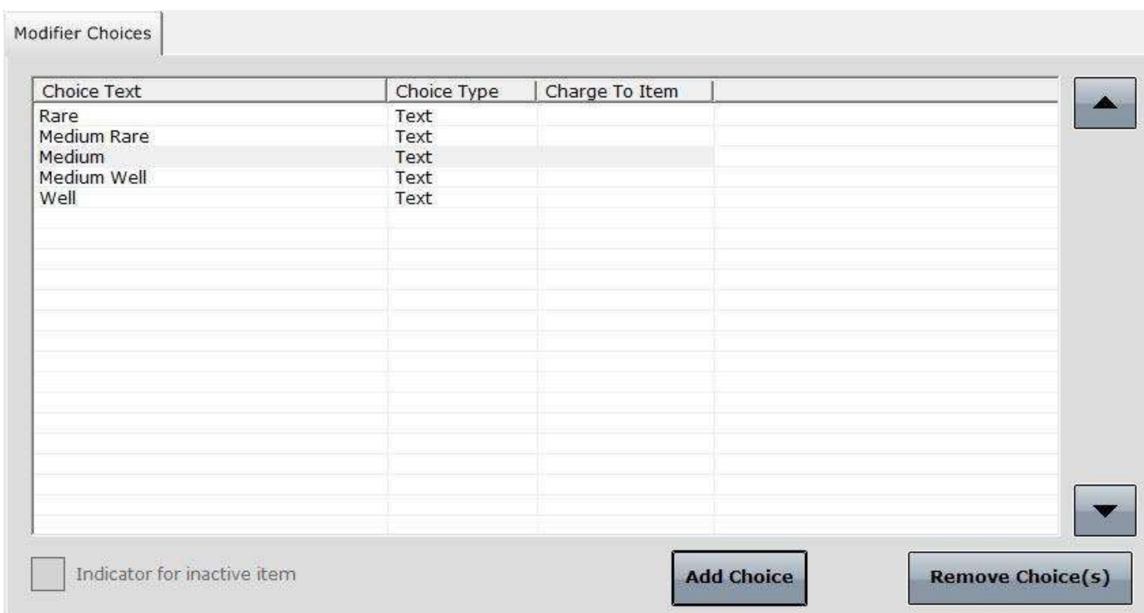
selecting AMCH in this field will charge 50 cents when this modifier is selected.

- 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*.





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



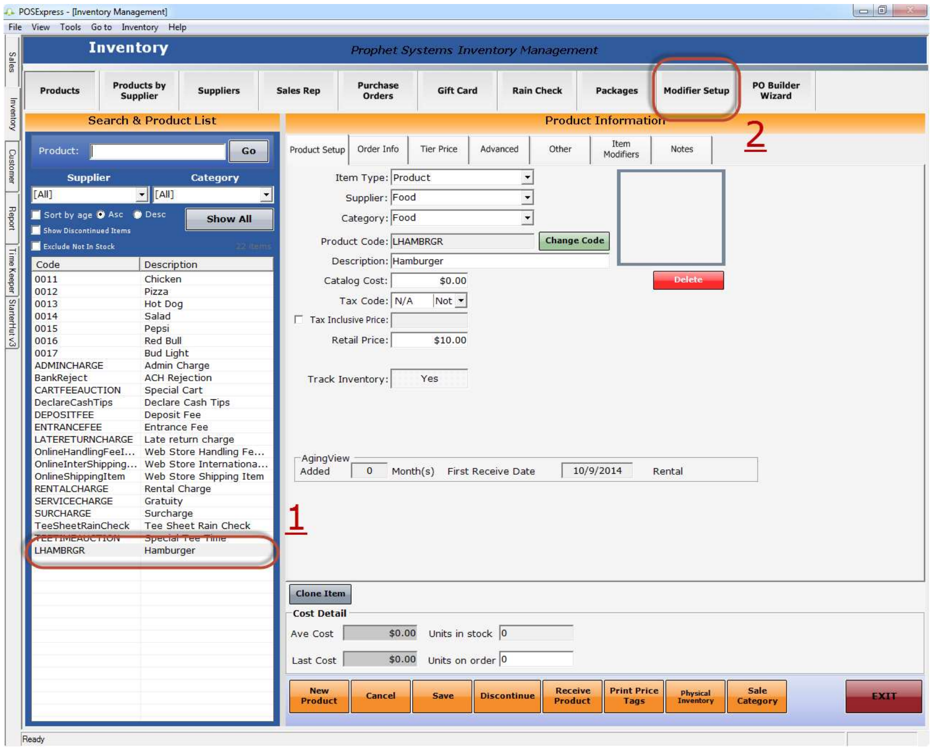
Note: The order of the modifiers can be changed by simply selecting the modifier you want to move, and then selecting the arrows to on the right, to move the choice up and down accordingly.

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

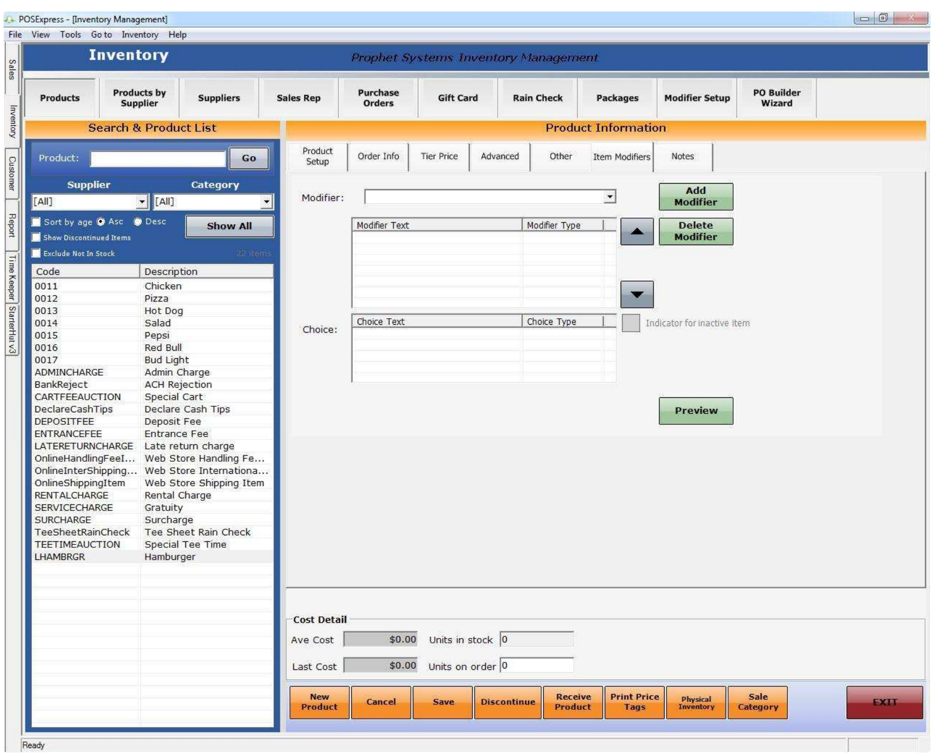
Linking a Modifier to an Inventory Item

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.

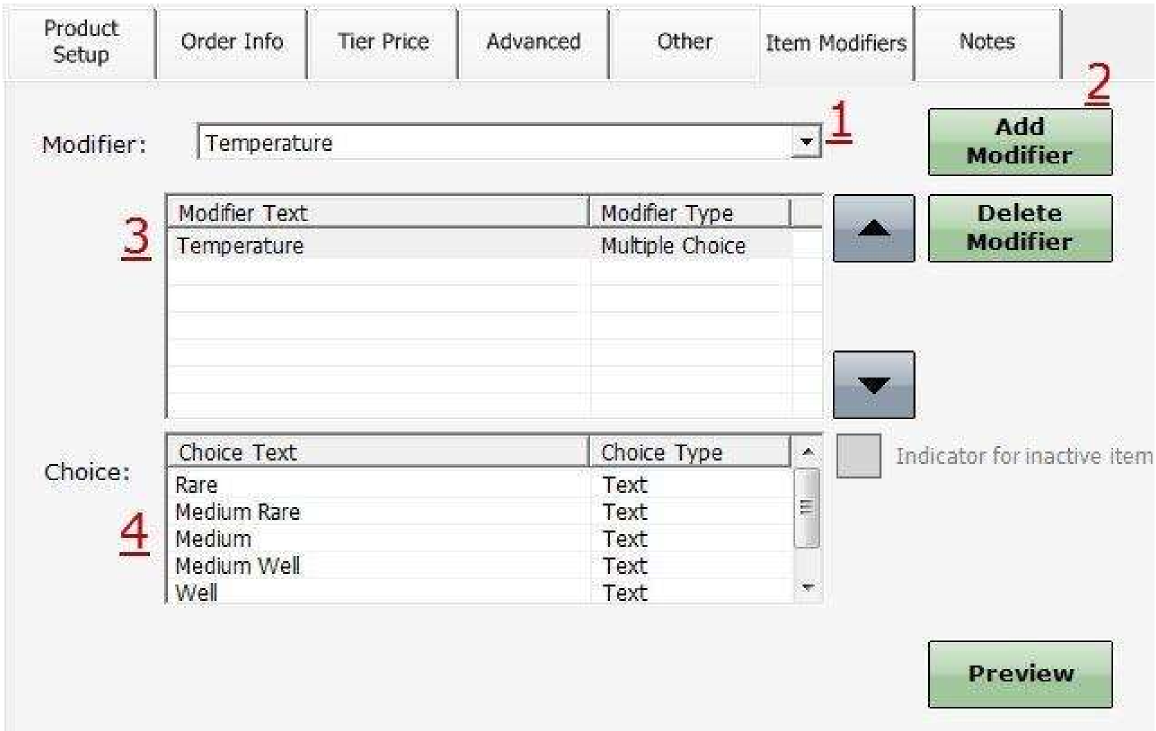
First, Select the Inventory module from the main screen. *The Search & Product List* will be displayed. Scroll or search through the list of products and select an item that will use a modifier. In the Example below, the product Hamburger, product code LHAMBRGR, is chosen. Once that product is selected,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



This will open the Modifier screen, pictured below:



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



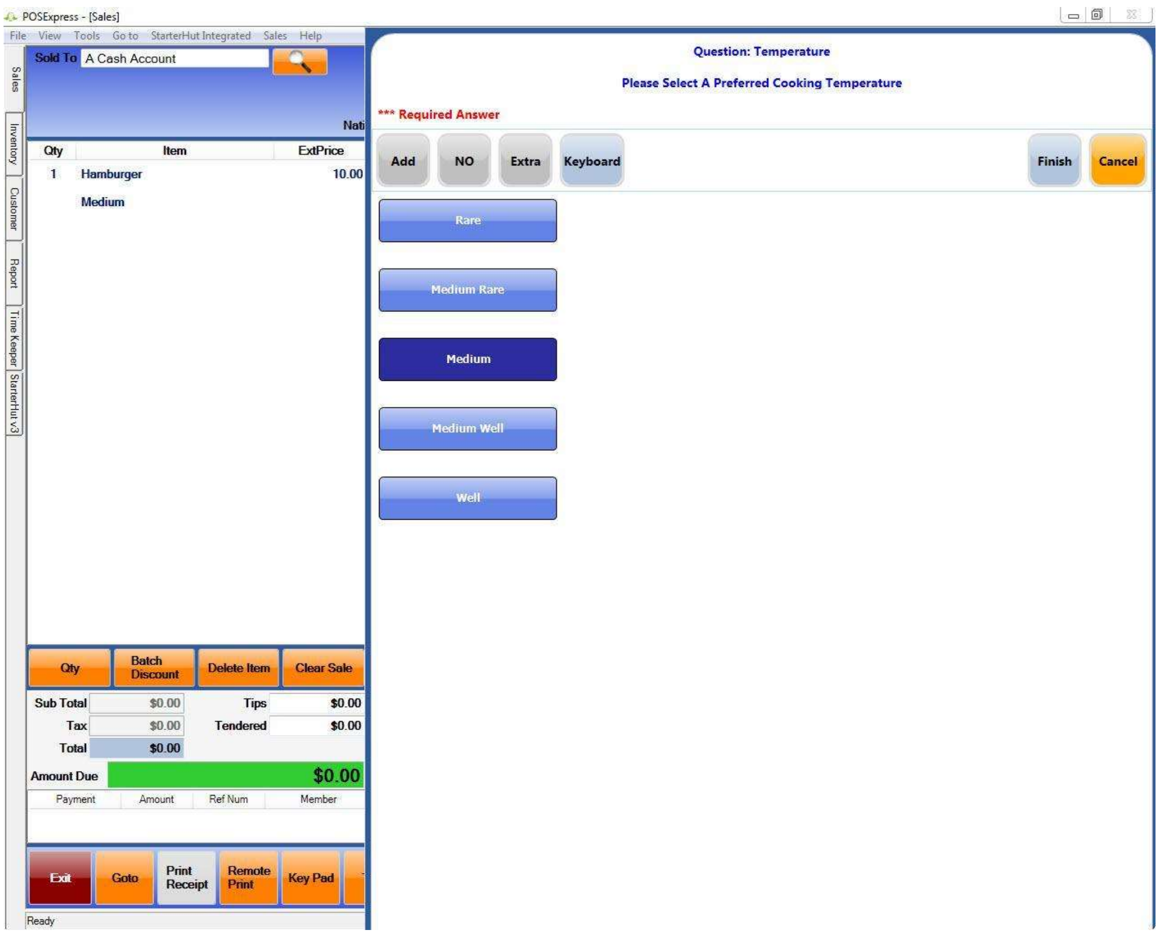
- The Modifier drop down box will contain a list of all the Modifiers that have been created. Select the desired Modifier for this item (#1 above). The Temperature Modifier was selected for the Hamburger item.
- After selecting the desired Modifier, select *Add Modifier* (#2 above) and the selection 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.

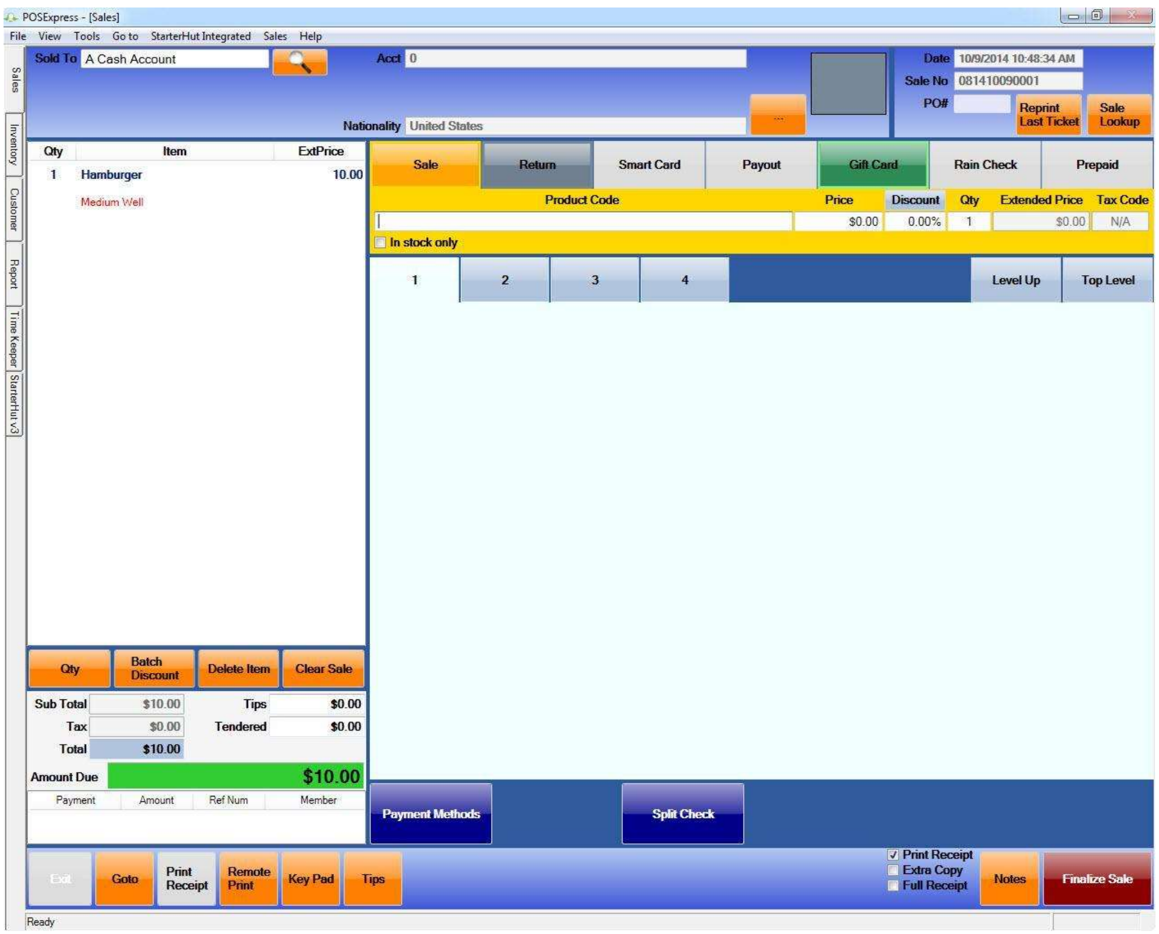
Select an inventory item that has a Modifier linked to it. Once selected, the Modifier screen will display. See the example below:



- 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.

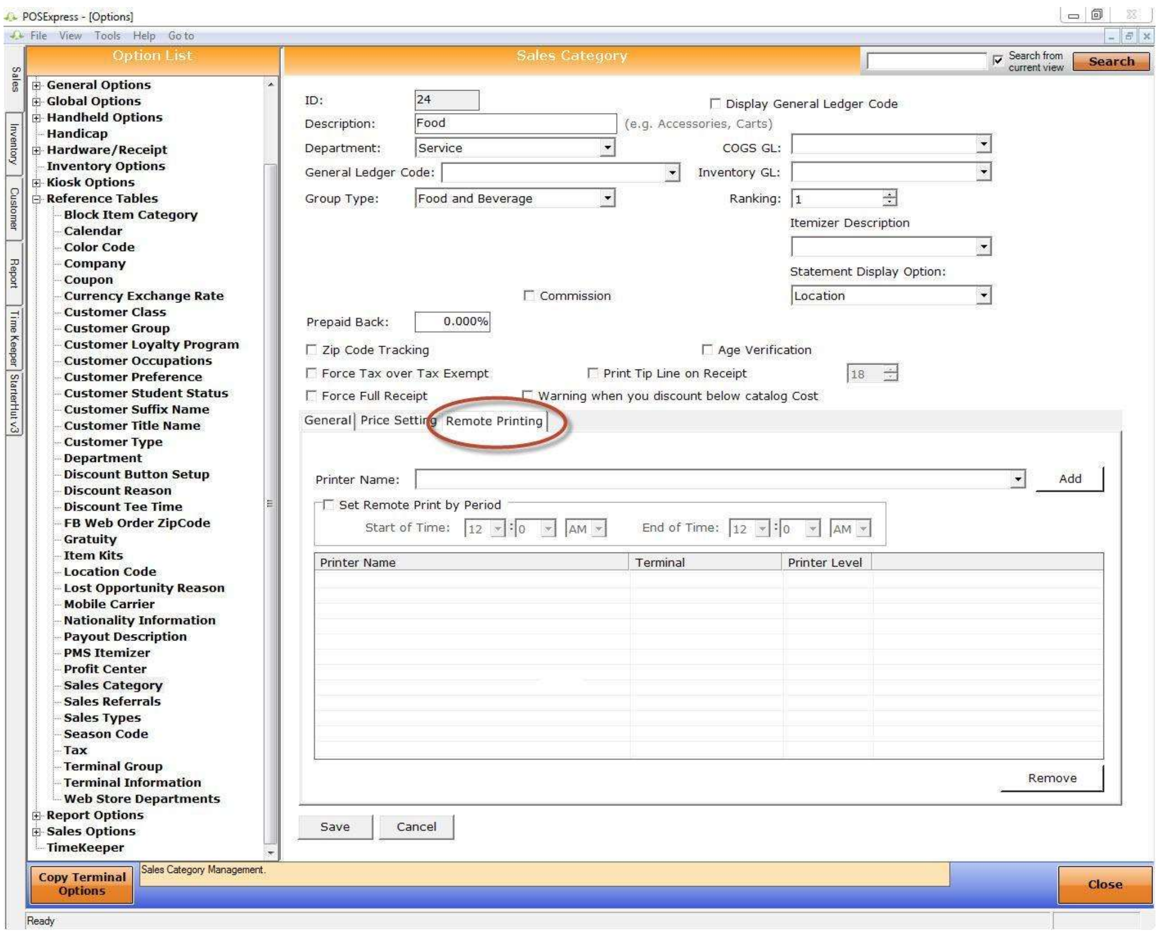


- Note: If more than one Modifier is assigned to a product, select "Next" to move to the next Modifier and its options.

Remote Printing

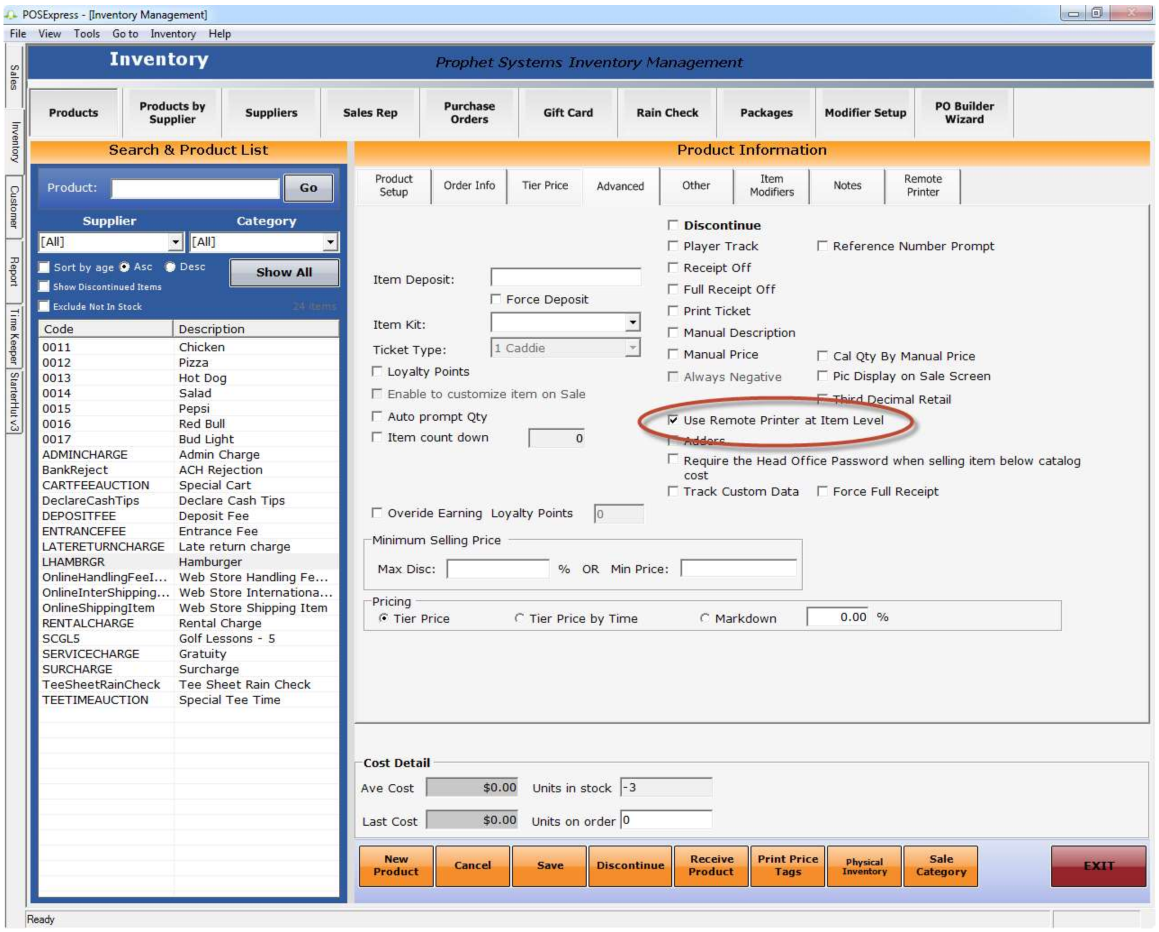
We can set up remote printing 2 ways either by Sales Category or per item at the item level

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.



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



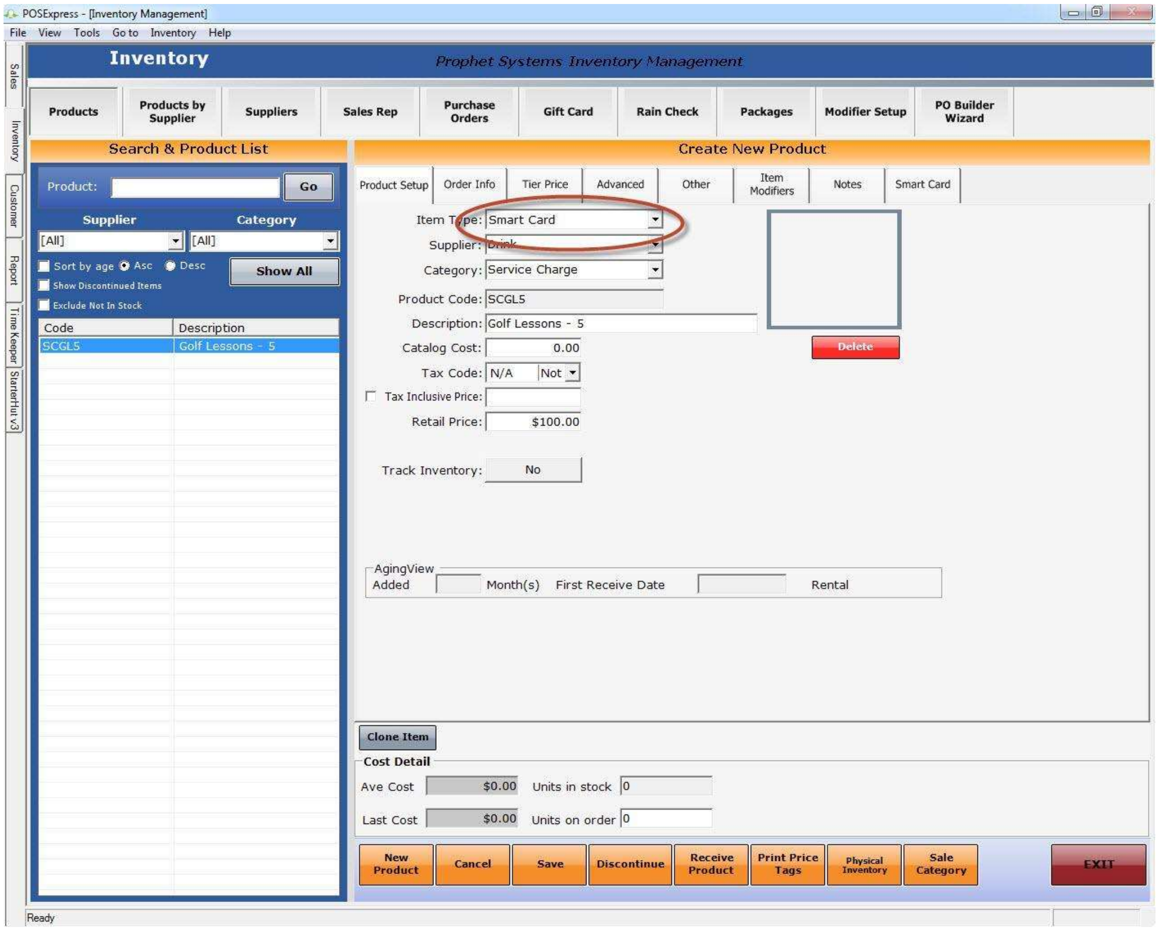
Smart Cards

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

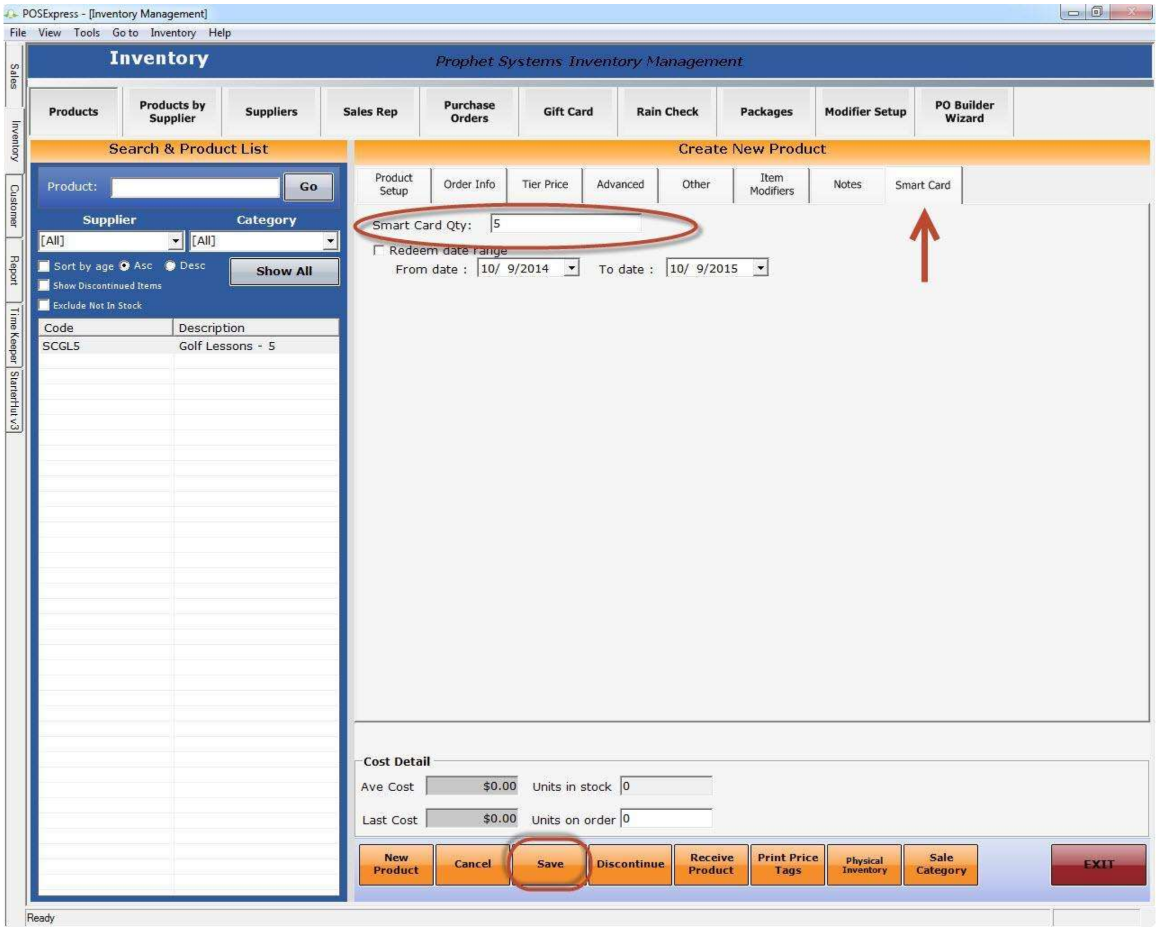
To create a Smart Card item, go to the *Inventory* module and select *New Product*. From the *Item Type* drop down menu, select *Smart Card*.

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.



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*.

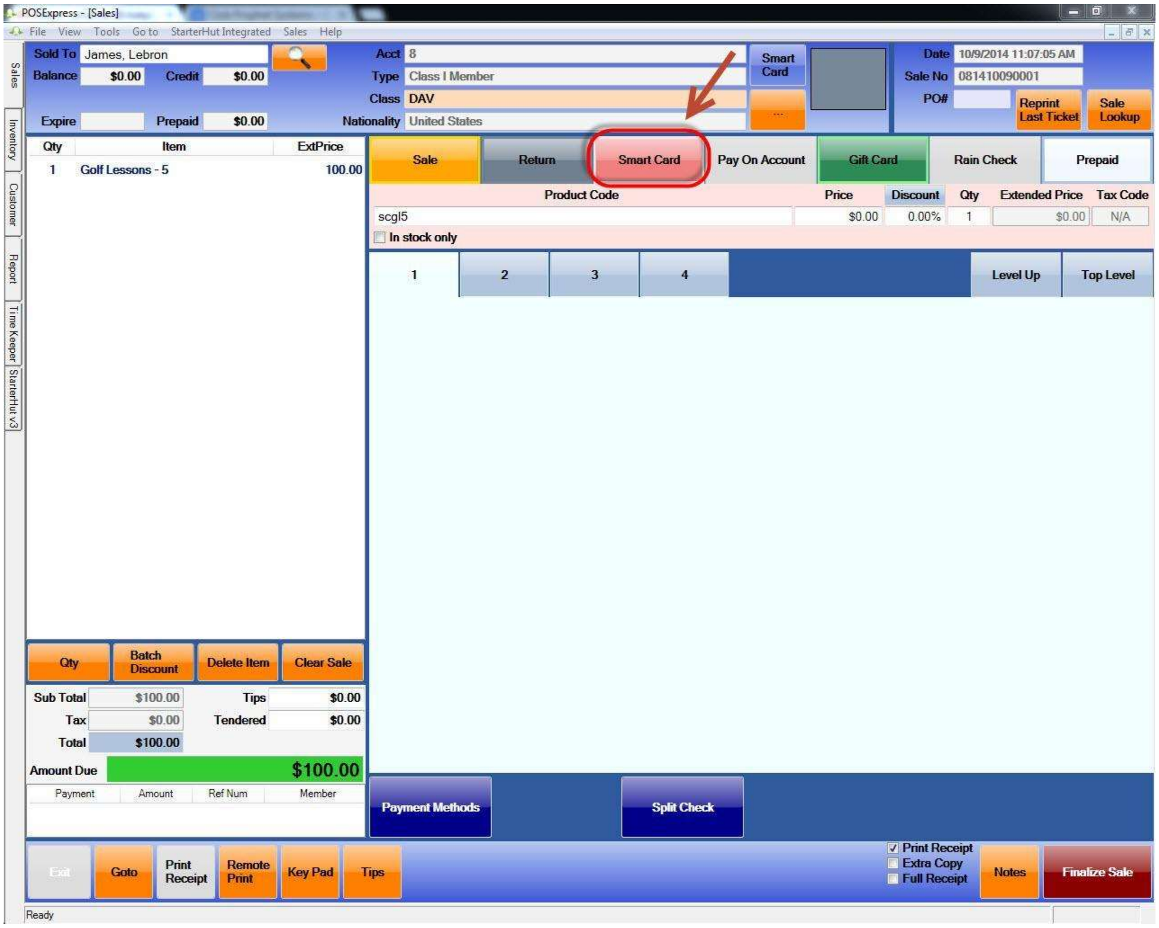
In the example below, 5 was entered because the product that was created is a bundle of 5 golf lessons. Remember, the price entered in the previous step was the price for 4 lessons. This is how the customer will receive 5 of these items for the price of 4.



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 and cannot be sold to A Cash Account*. 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.

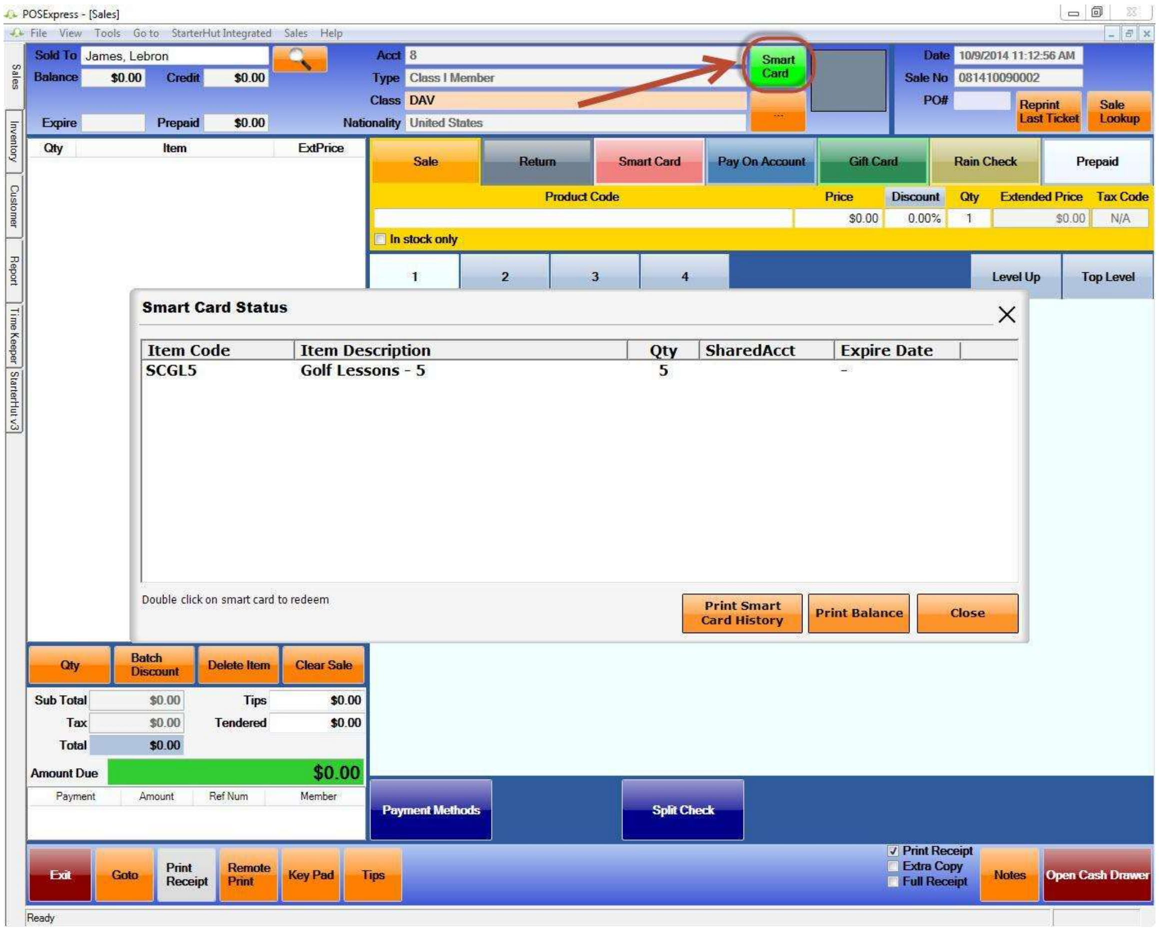
Enter the product code of the Smart Card item by either selecting the assigned QuickSale Button or by entering the product code in the *Product Code* field. Select *Finalize Sale*. This will assign the Smart Card quantity that was given to this product to the specific customer. In the example below,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



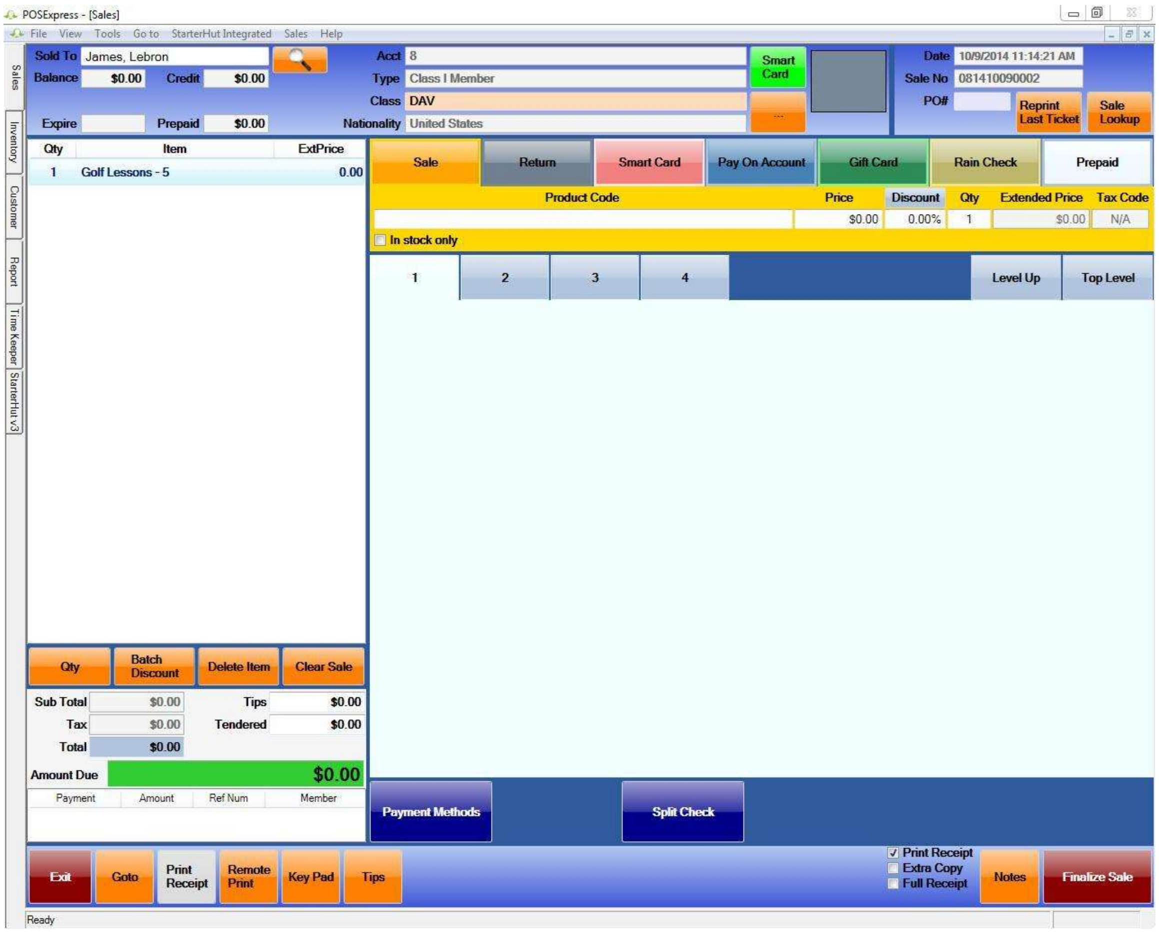
Redeeming a Smart Card

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.



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.