Portal User Guide

Inventory Maintenance

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Managing inventory in the Portal

The Portal has many powerful and flexible features for managing your inventory in a way that suits your organisation.

The basis of the portal inventory is the item. Items represent not just physical products, but everything your organisation stocks, sells, transfers or requires in the process of doing business. Items can be combined into kits, modified by other items, or used by another item to track stock.

Managing items

- *Inventory maintenance* on page 45.
- *Managing referrals and kits* on page 8.
- *Managing item options and modifiers* on page 156.
- *Managing item audits and reports* on page 249.

Managing groups and barcodes

- *Managing item and PLU groups* on page 180.
- *Managing price embedded barcodes* on page 229.

Managing discounts, promotions and specials

- *Managing discounts*.
- *Managing bulk discounts*.

Configuring the inventory

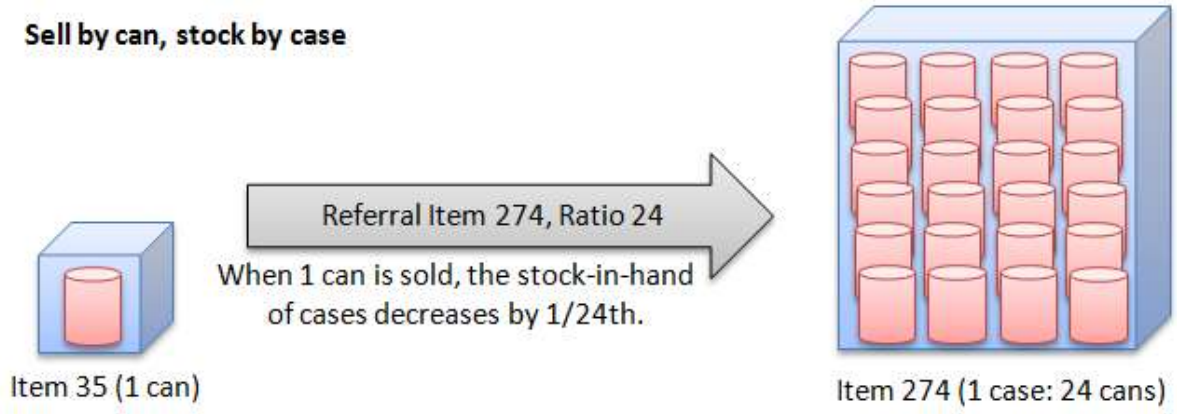
- *Configuring inventory options for your company*.
- *Site options - Inventory*.
- *Importing items into your inventory from a file* on page 68.

Managing referrals and kits

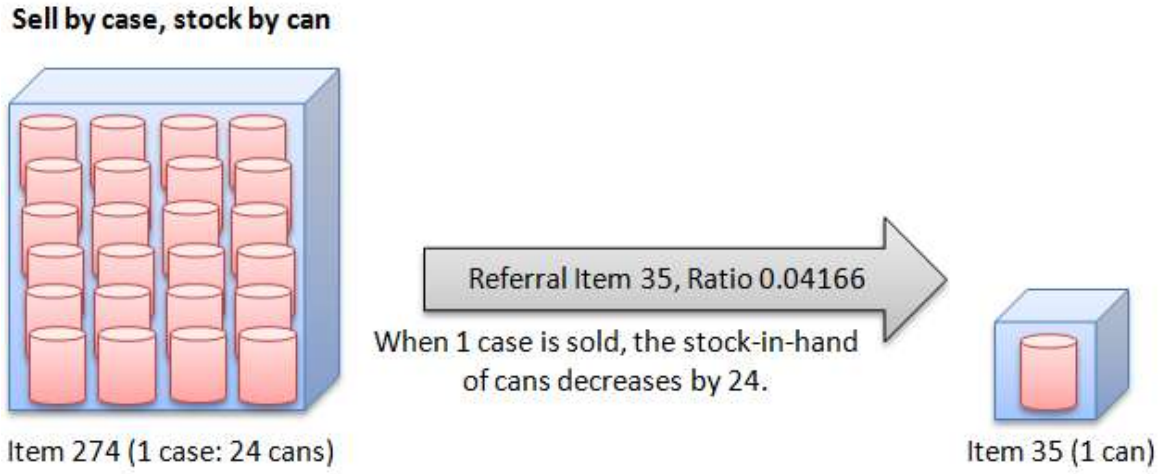
The Portal allows you to record an item as being part of another item as a referral, or manage multiple items together as a kit.

Referrals

A referral is a relationship between two items, where one item is considered part of another. For example, you may sell cans of drink individually, but order and stock them by case of 24 cans. You can configure a referral so that each can of drink sold automatically depletes stock from your cases by the correct ratio. When you have sold 24 cans, your stock of cases has depleted by 1. When you receive stock, the Portal automatically converts any can items received into the correct proportion of cases.



You can also create a referral the other way around if you order and stock an item individually, but combine it to sell by the case. In that case, each time you sell a case, your stock of individual cans would be depleted by 24.



In each case, the item that is referred to is the item whose stock is maintained. All stock movements from the referring item are passed directly to the referred item.

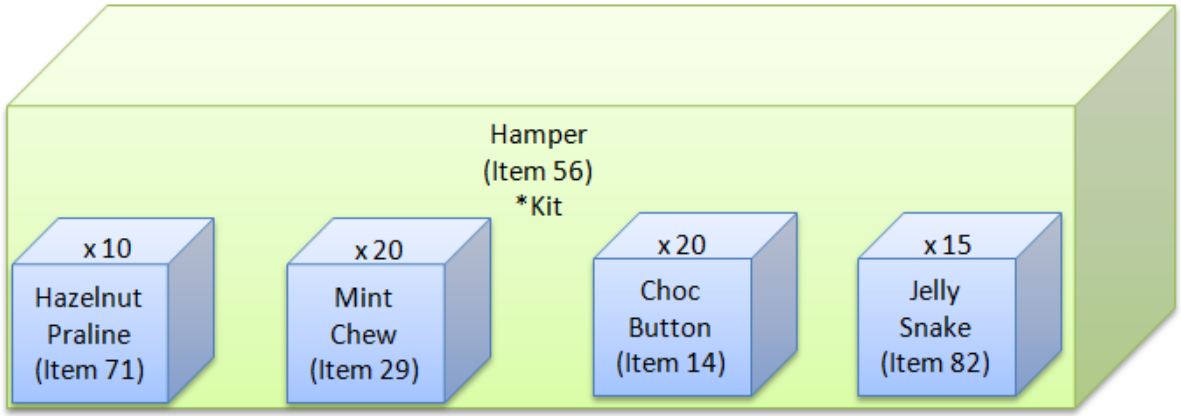
A referral can link to:

- a normal item
- another item that is a referral
- an item that is a kit.

Note: You can create a "chain" of referrals, for example where a can refers to a 6-pack, which refers to a case of 4 6-packs. The Portal permits a chain of up to ten items. However, for most accurate stock keeping we recommend you refer each item directly to the primary ordering item instead. That is, both the individual cans and the 6-packs should refer to the case. Take care not to create referral loops within your inventory, where item A refers to item B which refers to item C which refers to item A.

Kits

A kit is an item that contains various quantities of other, different items. For example, a hamper may contain a selection of chocolates and sweets. Each of the different chocolates is an item, and the hamper itself is an item representing the whole.



Kits can contain:

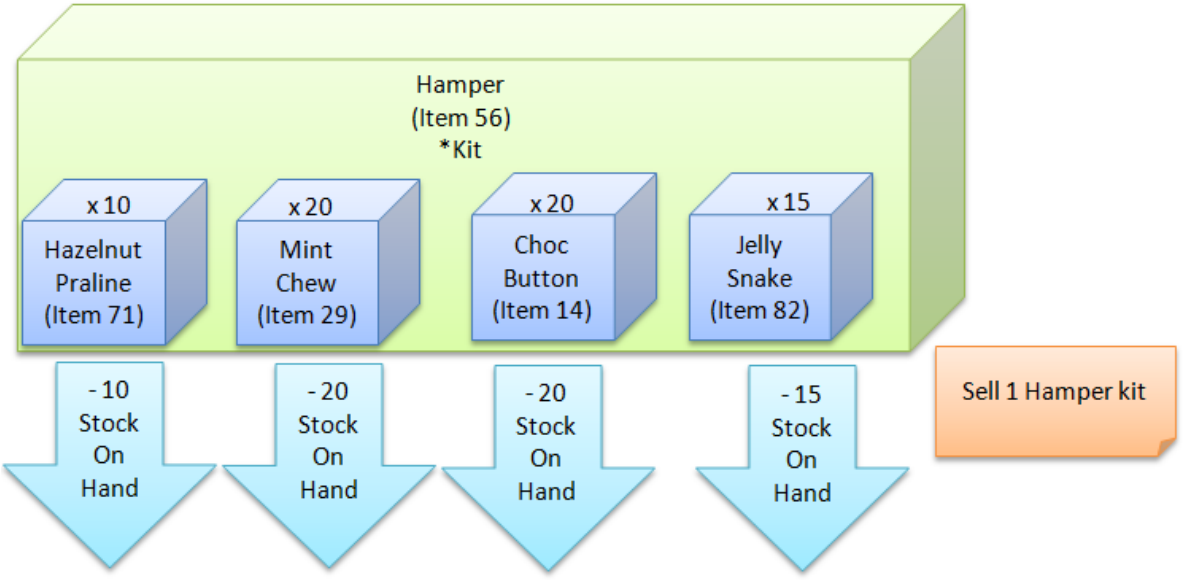
- normal items
- other kits
- referral items
- different quantities of items.

Note: Kits must contain at least two different items. If you want to create a kit that contains multiples of the same item, you should use a Referral.

The Portal provides two types of kits, which differ slightly in how they handle stock movement. You can use both at the same time in your company.

Normal kits

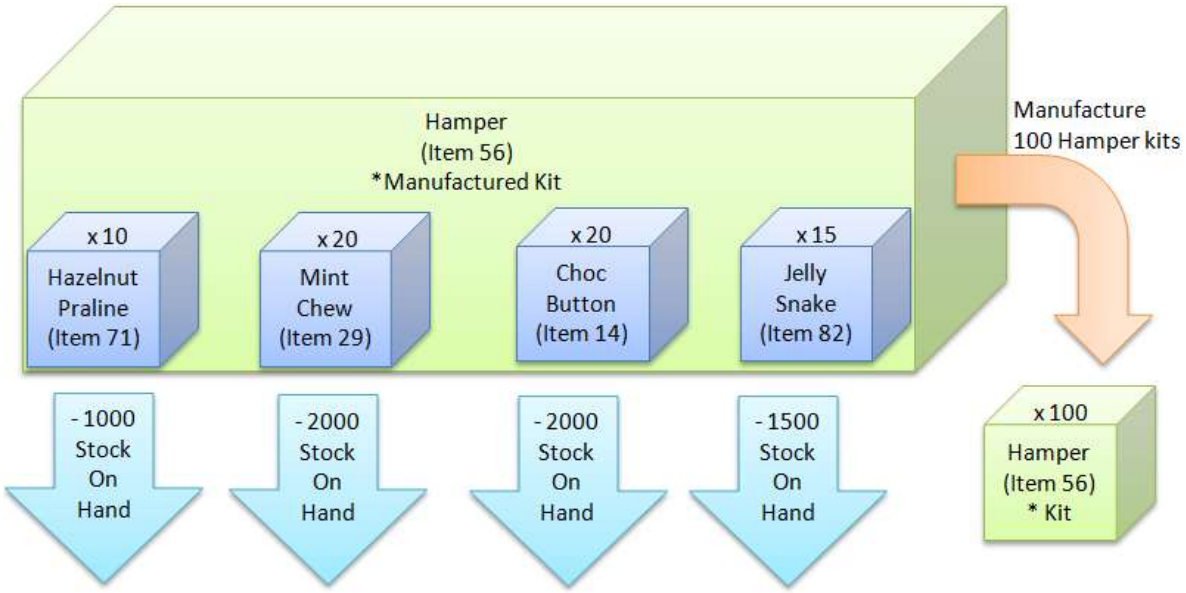
Normal kits are not maintained as separate stock in the Portal, and do not need to be prepared or manufactured in advance. When a kit is sold, the appropriate quantities of all the component items are depleted. The kit item itself does not record any stock movement, only the appropriate quantities of each item required.



Manufactured kits

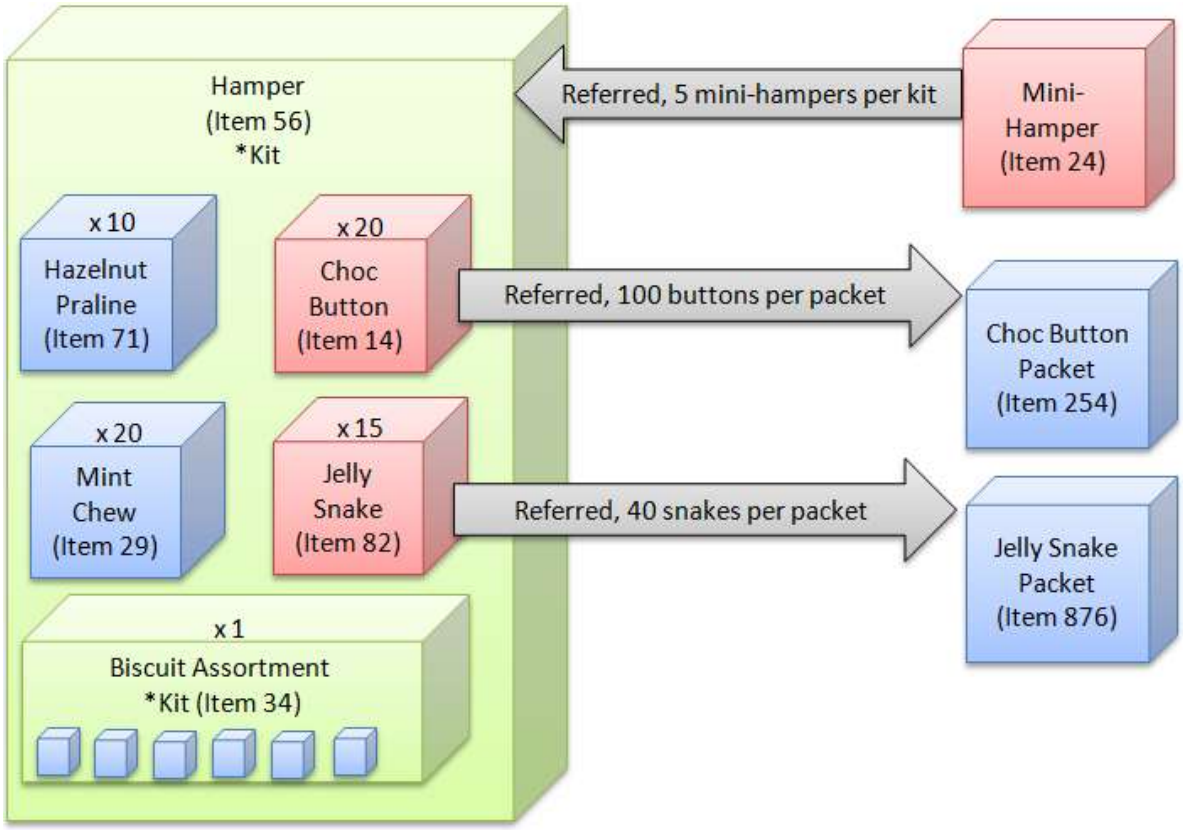
Manufactured kits maintain stock movement in the Portal. They must be created in batches before they can be sold. When a manufactured kit is created, the appropriate stock-on-hand of each of its component items is depleted. When the manufactured kit is sold, the stock-on-hand of the kit itself is depleted.

This is useful if you want to sell items both individually and in kits. You can easily track how much of an item you still have after the portion of it has been committed to the kit manufacturing.


Hamper
(Item 56)
*Manufactured Kit
x 10
Hazelnut Praline (Item 71)
x 20
Mint Chew (Item 29)
x 20
Choc Button (Item 14)
x 15
Jelly Snake (Item 82)
Manufacture 100 Hamper kits
- 1000 Stock On Hand
- 2000 Stock On Hand
- 2000 Stock On Hand
- 1500 Stock On Hand
x 100
Hamper (Item 56) * Kit

Combining kits and referrals

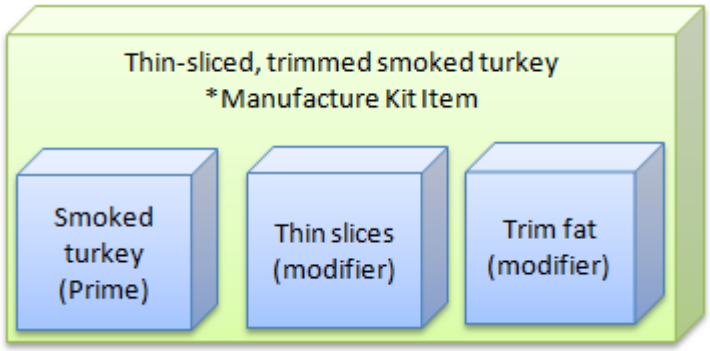
You can combine kits and referrals together to reflect the flow of stock through your company.



Note: If a manufacturing kit contains a normal kit, when the kit is manufactured, the item stock-on-hand for the items in the normal kit are decremented as well.

Kits of modified items

You can use kits to create items with modifiers automatically applied. This is recommended if you want to include specific item modifiers with an item in a kit. For each modified item you want to include in a kit, create a separate kit item that includes the prime item and the modifier items. Then include that kit item in your other kits.



See *Managing item options and modifiers* on page 156.

Also see:

- *Inventory Management - Stock Control tab* on page 81.
- *Kit Maintenance screen* on page 31
- *Manufactured Kit Item report* on page 36.
- *Manufacture Kit screen* on page 41.

What you can do:

1. *Creating a referral* on page 27.
2. *Editing or removing a referral* on page 30.
3. *Creating a kit* on page 15.
4. *Editing or removing a kit* on page 18.
5. *Manufacturing kits* on page 21
6. *Print kit batch information* on page 25.
7. *View kit sales information* on page 24.

Creating a kit

Create a kit when you want to sell an item made up of other items in your stock. Kits can contain items, other kits and referrals.

> **Note:** Kits must contain at least two different items. If you want to create a kit containing multiple units of one item, use a Referral. See *Creating a referral* on page 27. Also see *Managing referrals and kits* on page 8.

You can create:

- Normal kits, where the stock of the kit item is not tracked, and selling a kit depletes the stock-on-hand of the component items.
- Manufactured kits, where the stock of the kit must be created in advance, depleting the stock-on-hand of the component items at the time of creation.

> **Note:** If a manufactured kit contains other kits as components, these kits are treated as manufactured kits during manufacturing. That is, the stock-on-hand is depleted when the kit is manufactured, even if the items belong to a normal kit.

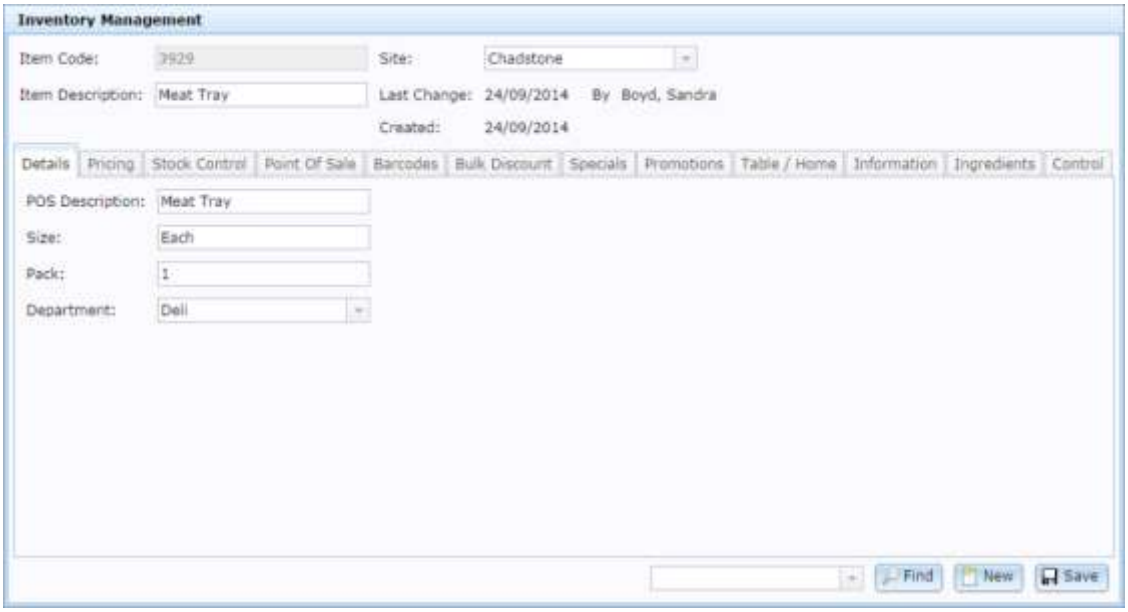
To create a kit:

1. Create at item to represent your kit.

   See *Creating a new item* on page 47.

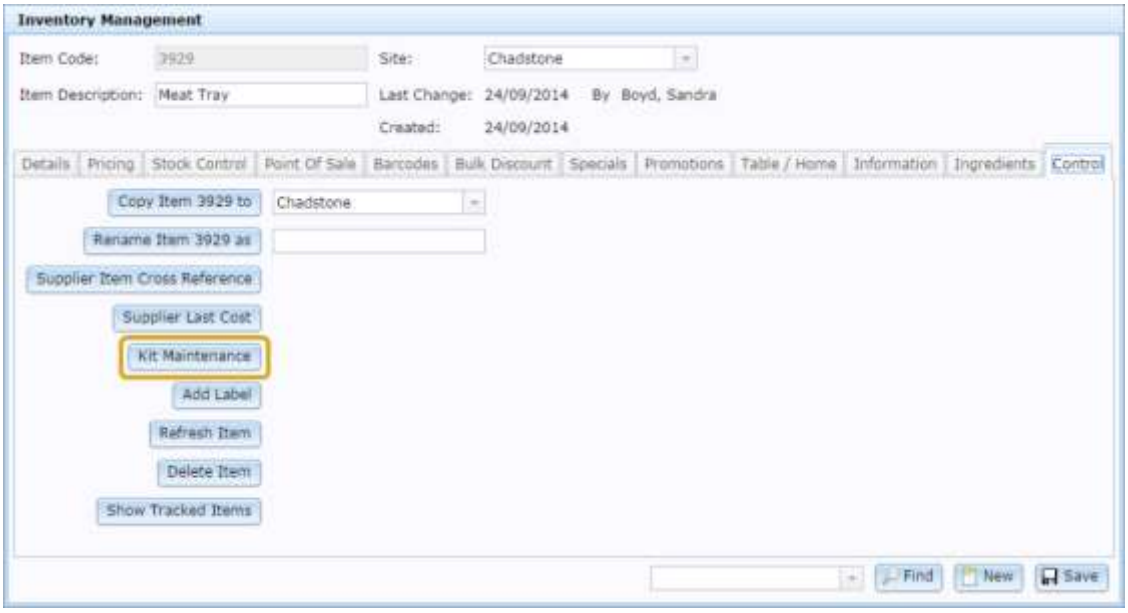
   You can also use an item you have already created.

   See *Finding an item using the search screen* on page 50.



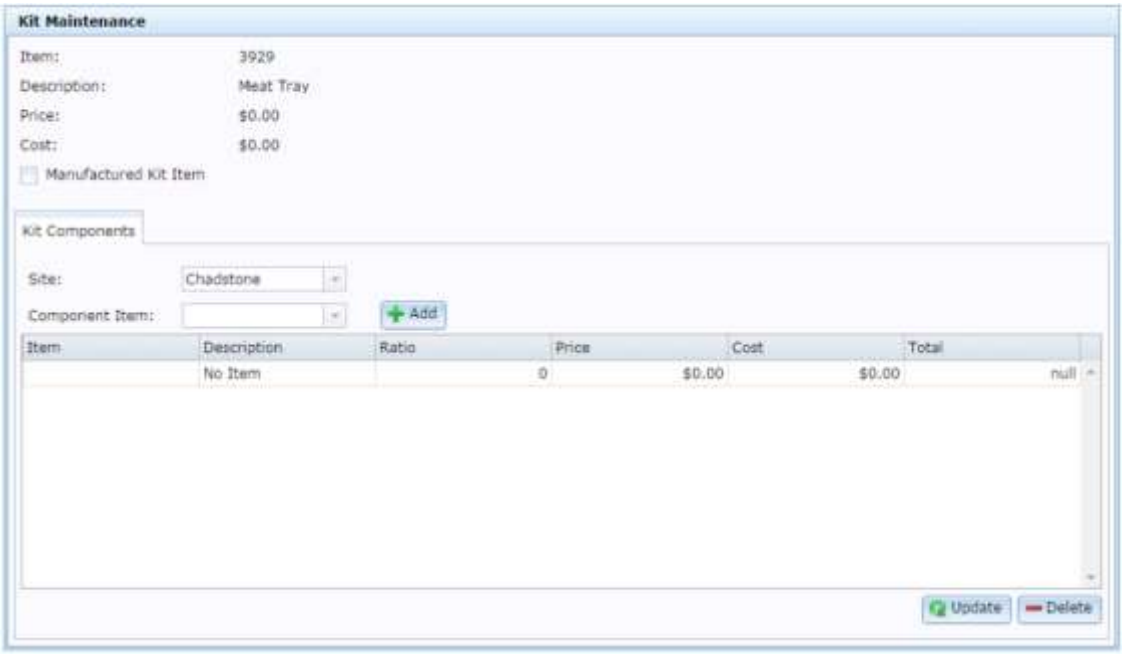
2. Press the Control tab.

   The Control tab is displayed.



3. Press Kit Maintenance.

   The Kit Maintenance screen is displayed.



   See *Kit Maintenance screen* on page 31.

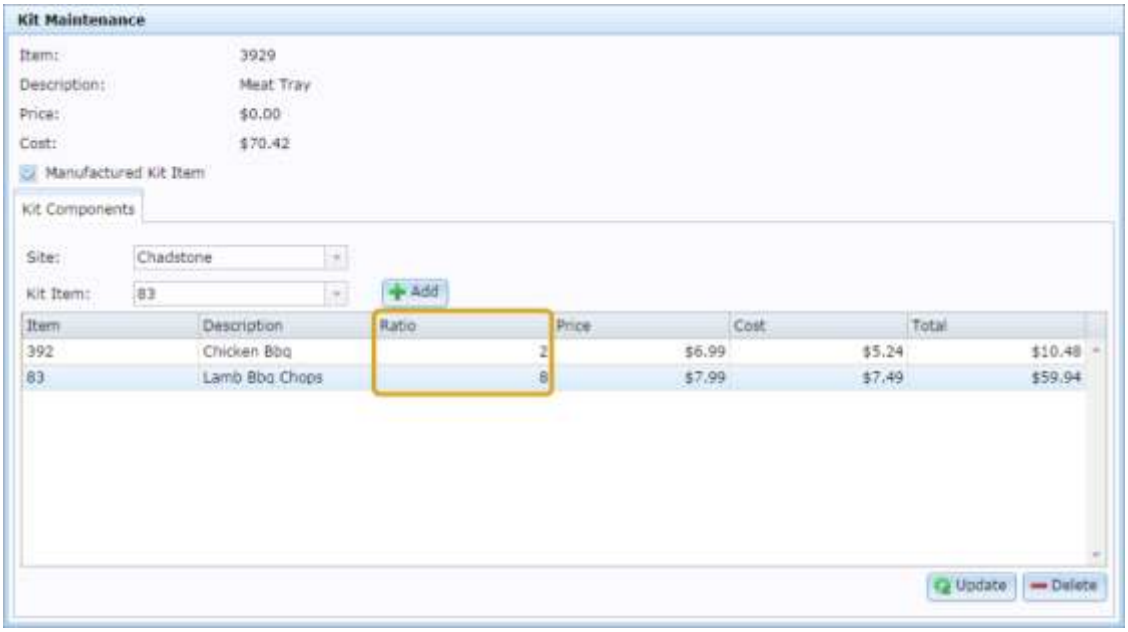
4. If you want to create a manufactured kit, where stock of the kit must be created, decreasing the stock-on-hand of its component items, select **Manufactured Kit Item**.

If you do not select **Manufactured Kit Item**, the kit functions as a normal kit. Stock-on-hand levels for the kit item itself are not maintained, and it does not require a manufacturing step. When the item is sold, the component items' stock-on-hand levels are depleted.

5. Search for items to add as component items.

   See *Finding an item with a search field* on page 56.

6. For each item you add, type the number of units you want to include in the kit in the **Ratio** field.



> **Note:** If the kit is a manufactured kit, you can edit these ratios when you manufacture a batch of items. See *Manufacturing kits* on page 21.

7. The cost of the kit is calculated in the Cost field.

> **Tip:** To edit the price of the kit, see *Inventory Management - Pricing tab* on page 76.

8. When you have finished adding component items, press Update.

   The kit item is complete.

> **Note:** If you have created a manufactured kit, you need to manufacture kit items to have stock-on-hand to sell. See *Manufacturing kits* on page 21.

Editing or removing a kit

You can edit a kit to:

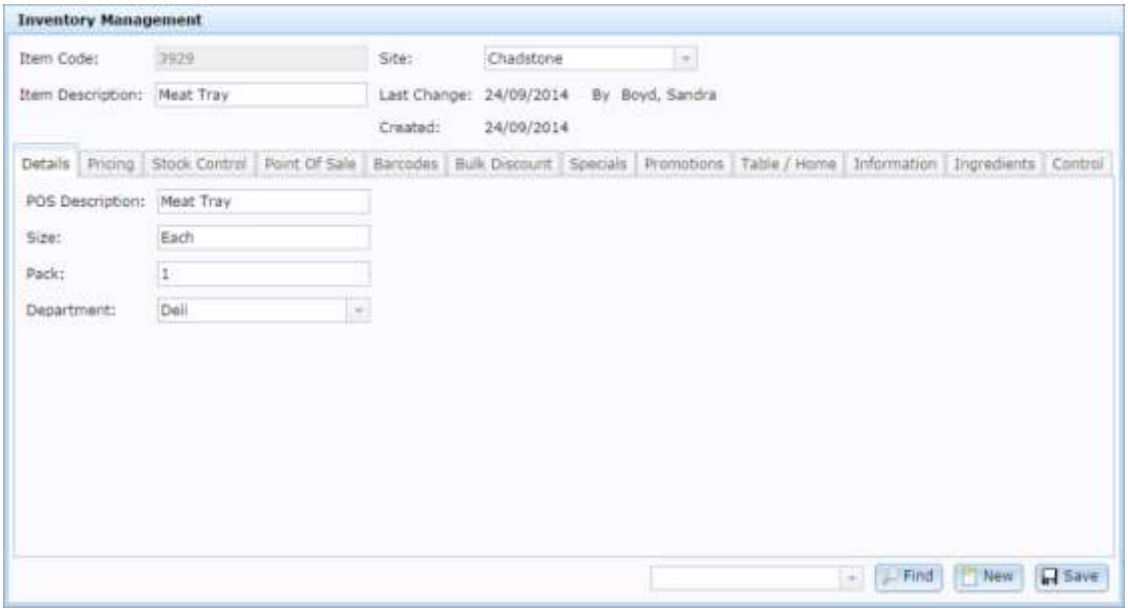
- Change it from a manufactured kit to a normal one, or vice versa.
- Add or remove items.
- Change item ratios.
- Remove the kit entirely.

> **Note:** You can remove a kit by removing all its items. The Portal automatically converts empty kit items back to normal items.

To edit or remove a kit item

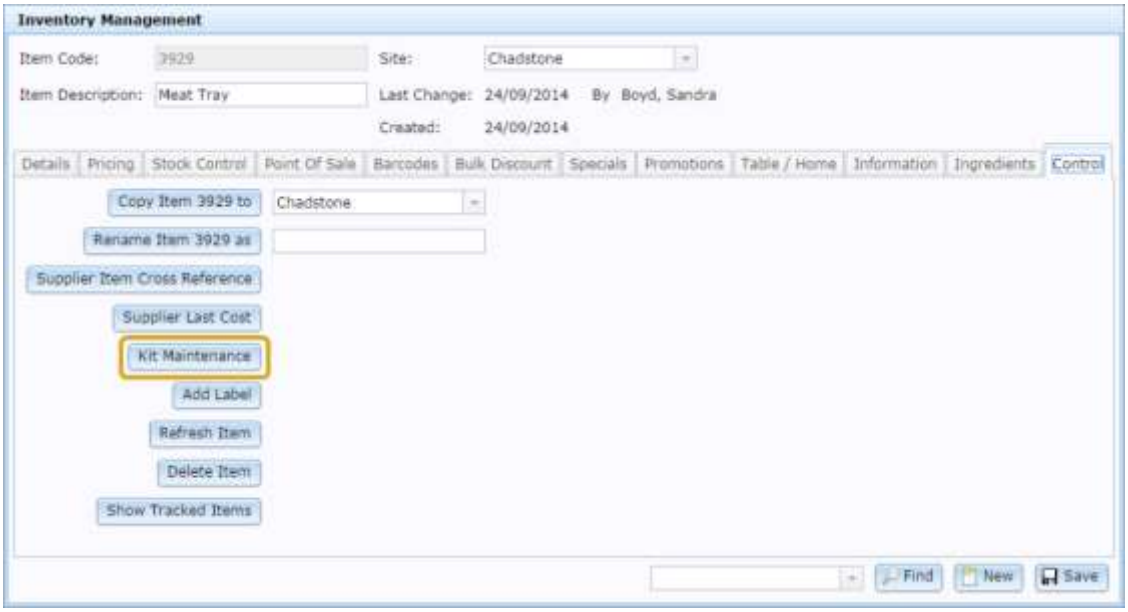
1. Find the kit item in Item Inventory.

   See *Finding an item using the search screen* on page 50.



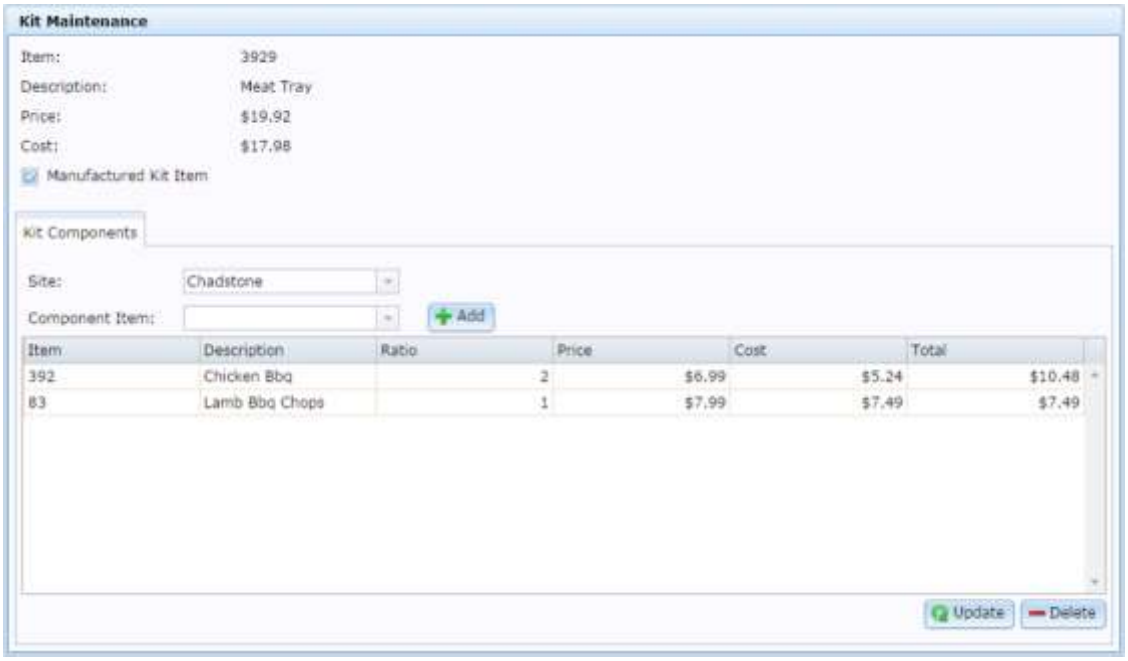
2. Press the Control tab.

   The Control tab is displayed.



3. Press Kit Maintenance.

   The Kit Maintenance screen is displayed.

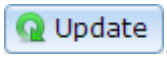


4. Make the required changes:
   1. Press the Ratio field of an item to change its ratio.
   2. Press an item and press Delete to remove the item from the kit.

> **Note:** If you remove all of the items from the kit, the Portal automatically converts it back to a normal item.

3. Select or clear the Manufactured Kit Item field to change the kit to a manufactured kit or normal kit.
4. Add additional items by searching for them. See *Finding an item with a search field* on page 56.

   See *Creating a kit* on page 15.

5. Press 

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The changes are saved.

Manufacturing kits

Manufactured kits must be manufactured before they can be sold. When they are manufactured, the stock-on-hand of the component items is depleted, and the stock-on-hand of the manufactured kit is increased.

Kits are manufactured in batches. For each batch, you can select:

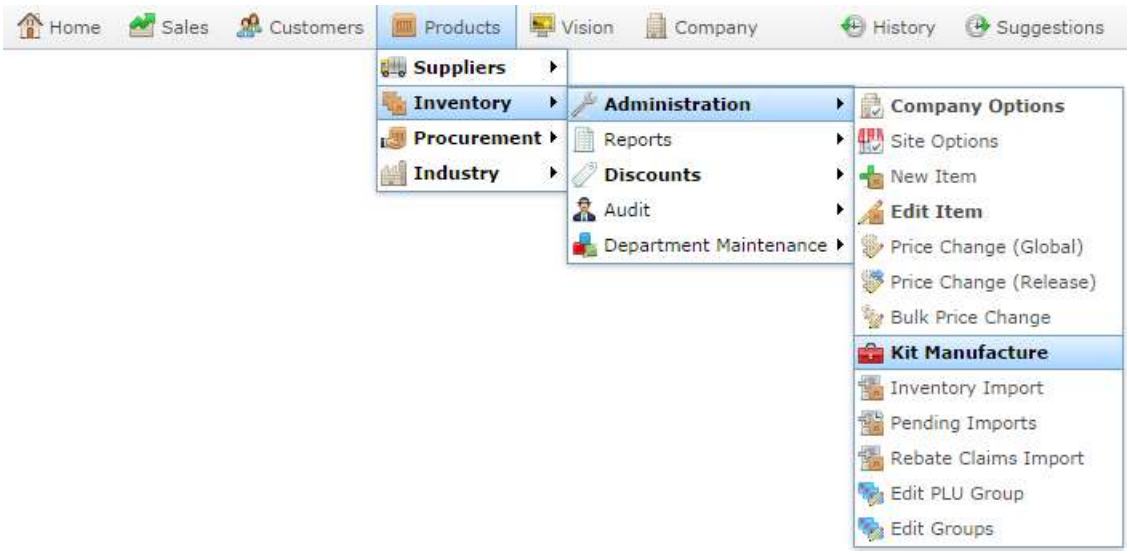
- the number of kits of to manufacture
- the ratio of component items within the kit.

> **Note:** You cannot add new items to a kit when manufacturing. To add new items, you must edit the kit item. See *Editing or removing a kit* on page 18.

Batches are created automatically by the Portal when you manufacture a kit, and stored by date and batch number. You can select existing batches to reproduce the same quantity of kits.

To manufacture a kit:

1. Press Products in the main menu bar.
3. Press **Inventory** > **Administration** > **Manufacture Kit**



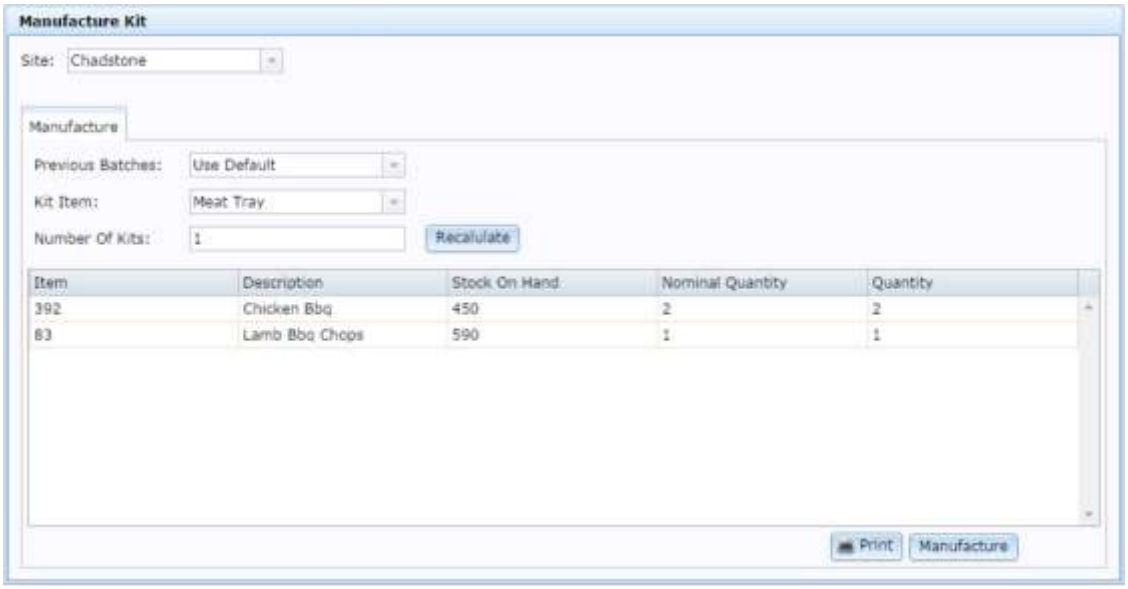
The Kit Maintenance Report is displayed

4. Press the name of the kit you want to manufacture.

   A popup menu is displayed.

5. Select **Manufacture**.

   The Manufacture Kit screen is displayed.



6. Select the **Site** you want to manufacture kits for.
7. Select the kit you want to manufacture from the **Kit Item** drop-down list.

8. If you want to use the settings of a previous batch, select it from the **Previous Batches** drop-down list.

> **Note:** You can also select **Average** to create a batch that is the average of all your previous batches.

9. Type the **Number Of Kits** you want to create.
10. Press Recalulate.

    The Portal updates the stock-in-hand required.

11. If you want to edit the quantity of an item per kit, type the new total in the **Quantity** column of the grid.

> **Note:** If you change the item quantities before you select the number of kits to make, the Portal overrides any changes you made to the quantities.

> **Note:** Ensure your quantities are correct, as you cannot undo a manufactured kit batch.

12. Press Manufacture.

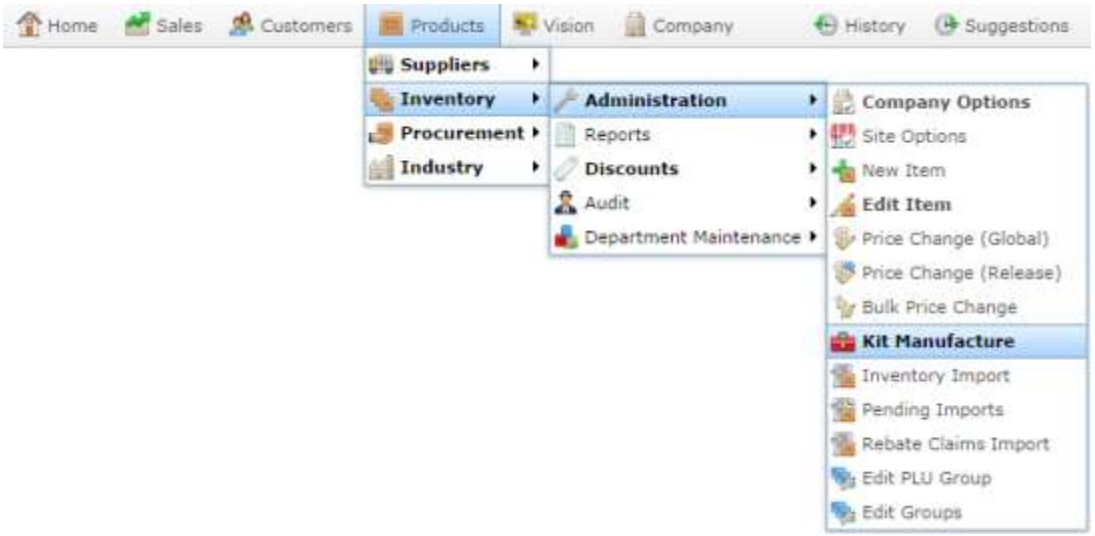
    The stock-on-hand of the component items is depleted, and the stock-on-hand of the kit item is increased.

View kit sales information

View the Manufacture Kit report to see information on the cost, sales, profit and last sales of manufactured kits.

To view the kit sales information:

1. Press Products in the main menu bar.
1. Press **Inventory** > **Administration** > **Kit Manufacture**



The Kit Maintenance Report is displayed

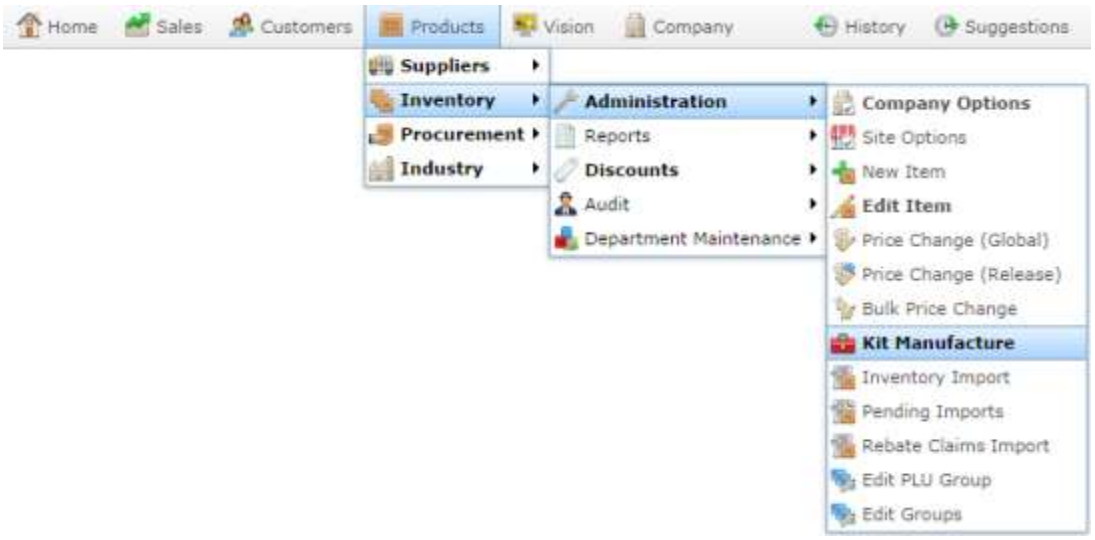
Print kit batch information

Print a kit's batch information when you want a record of the components required to make a kit, along with a batch's manufacture date and batch number.

> **Note:** You can also print batch information before you manufacture the batch. These reports do not have batch number or date information.

To print a manufactured kit's batch information:

1. Press Products in the main menu bar.
2. Press **Inventory** > **Administration** > **Manufacture Kit**



The Kit Maintenance Report is displayed

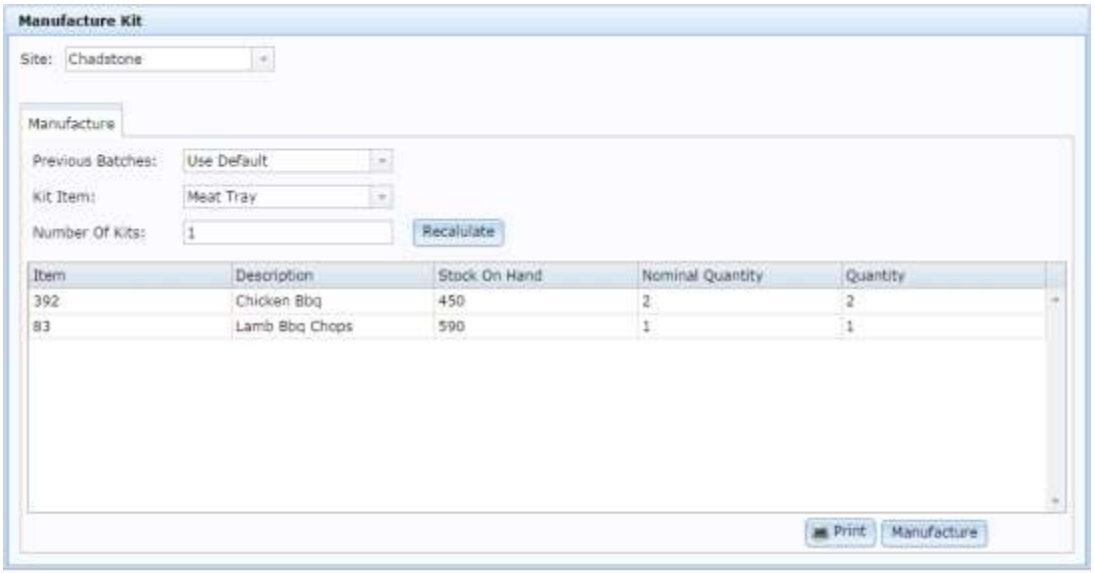
> **Tip:** You can use the fields on the left to filter the kits displayed in the report.

3. Press the name of the kit you want to manufacture.

   A popup menu is displayed.

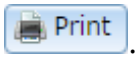
4. Select **Manufacture**.

   The Manufacture Kit screen is displayed.



5. Select the **Site** you want to manufacture kits for.
6. Select the **Kit** you want to manufacture.
7. Select the batch you want to view from the **Previous Batches** drop-down list.

> **Note:** Batches are listed by date of manufacture and batch number.

8. Press 

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   The batch information is displayed as a PDF.

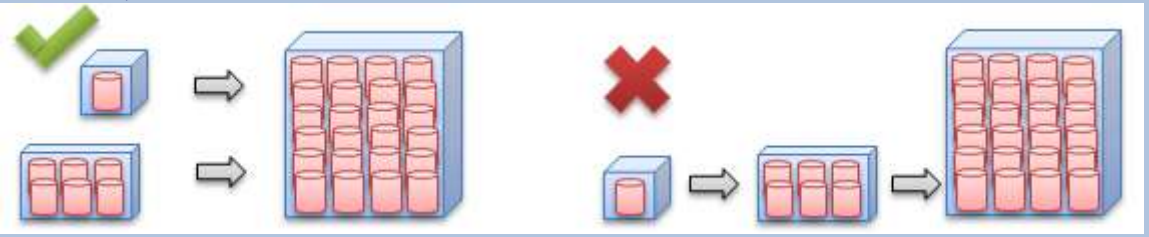
Creating a referral

Create a referral when one item represents a smaller or larger amount of another item. For example if you:

- Sell cans of drink individually, but order and stock them by case of cans.
- Bundle cans together into a six-pack but order and stock them by individual can.

See *Managing referrals and kits* on page 8.

Note: While the Portal is capable of creating chains of referrals up to ten items deep, if you have several items that you want to sell from the same stock item, such as selling both individual cans and six packs from cases of cans, it is best to refer both the selling items to the stock item individually, rather than creating a 'chain' where one item refers to another, which refers to another.



To create an item referral:

1. Create the item that you use for ordering and stocking, also known as the Stock Item.

   For example, if you are selling individual cans that you order by the case, create an item for the case of cans. You can use an existing item if you have already created it.

2. Take note of the item's number.

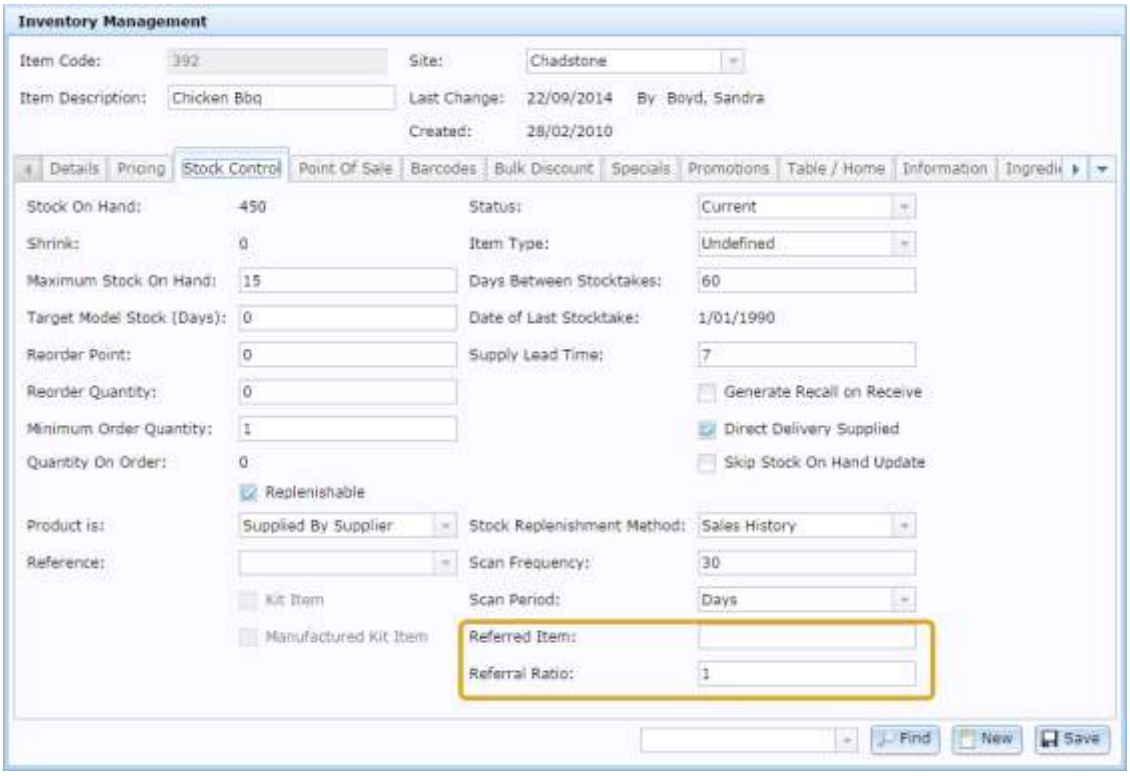
   See *Creating a new item* on page 47.

3. Create the item that you use for selling, also known as the Selling Item.

   For example, if you're selling individual cans that you order by the case, create an item for the individual can to be sold. You can use an existing item if you have already created it.

4. While in Inventory Maintenance for the Selling Item, press the Stock Control tab.

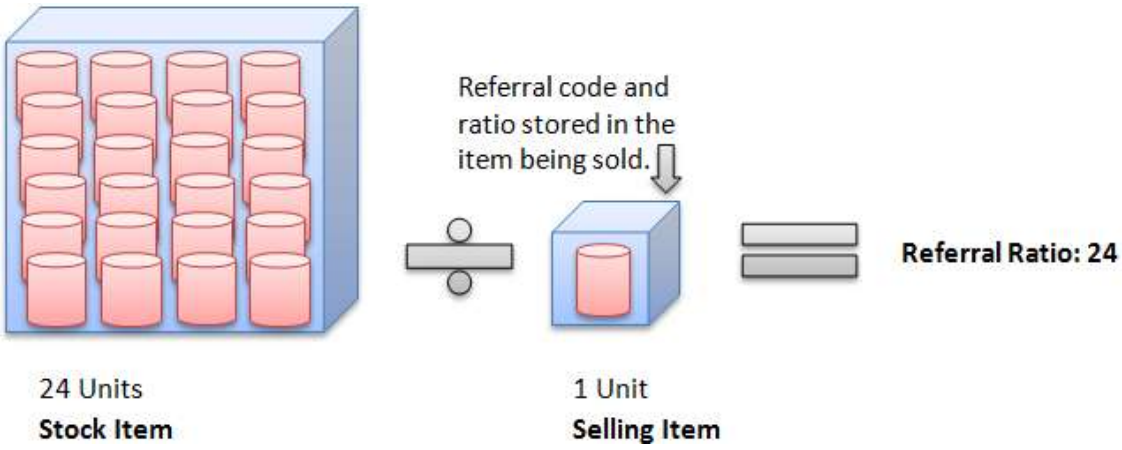
   The Stock Control tab is displayed.



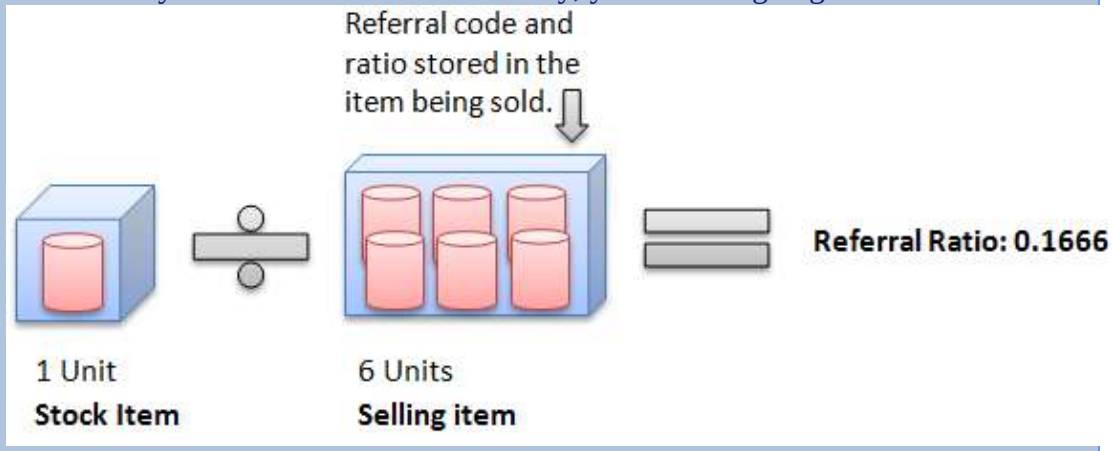
5. In the **Referred Item** field, type the item number of the Stock Item.
6. In the **Referral Ratio** field, type the number of Selling Item units make up one Stock Item unit.

> **Tip:** The Referral system is structured to keep the ratio calculation easy for the most typical use. If you sell individual items from stocked packs of multiple items, like individual cans from a case, the ratio should not require decimal places.

For example, if there are 24 cans in a case, then the Referral Ratio is 24.



Note: If you are using a referral to sell a bundle of units, such as selling a six-pack of cans that you stock and order individually, your ratio is going to be a decimal.



7. Press Save.

   The referral is created.

Editing or removing a referral

You can edit a referral if you need to change:

- which Stock Item your Selling Item comes from
- the ratio between your Stock and Selling Items.

You can also remove the referral so that the Selling item no longer relates to the Stock item.

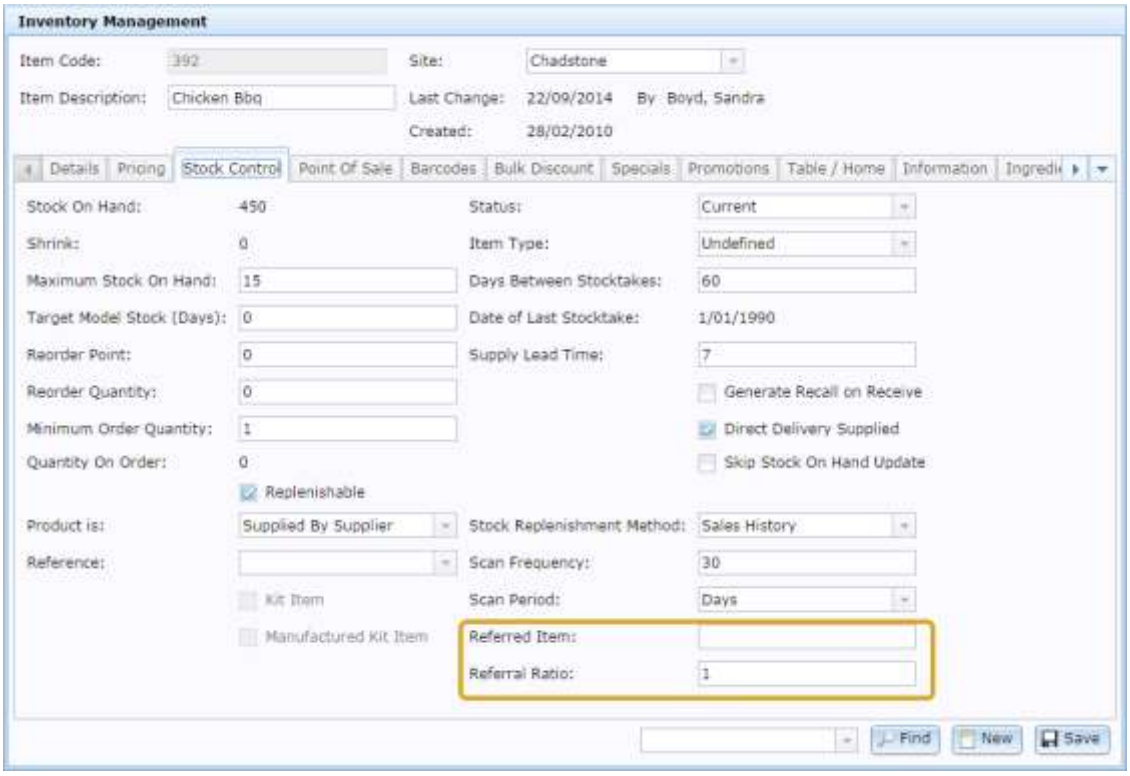
To edit or remove a referral:

1. Find the Selling item in Item Maintenance.

   See *Finding an item using the search screen* on page 50.

2. Press the Stock Control tab.

   The Stock Control tab is displayed.



3. Edit the **Referred Item** or **Referral Ratio** fields as required.

   See *Creating a referral* on page 27.

4. If you want to remove the referral, delete the information in the **Referred Item** and **Referral Ratio** fields.

5. Press Save.

   The referral is updated.

Kit Maintenance screen

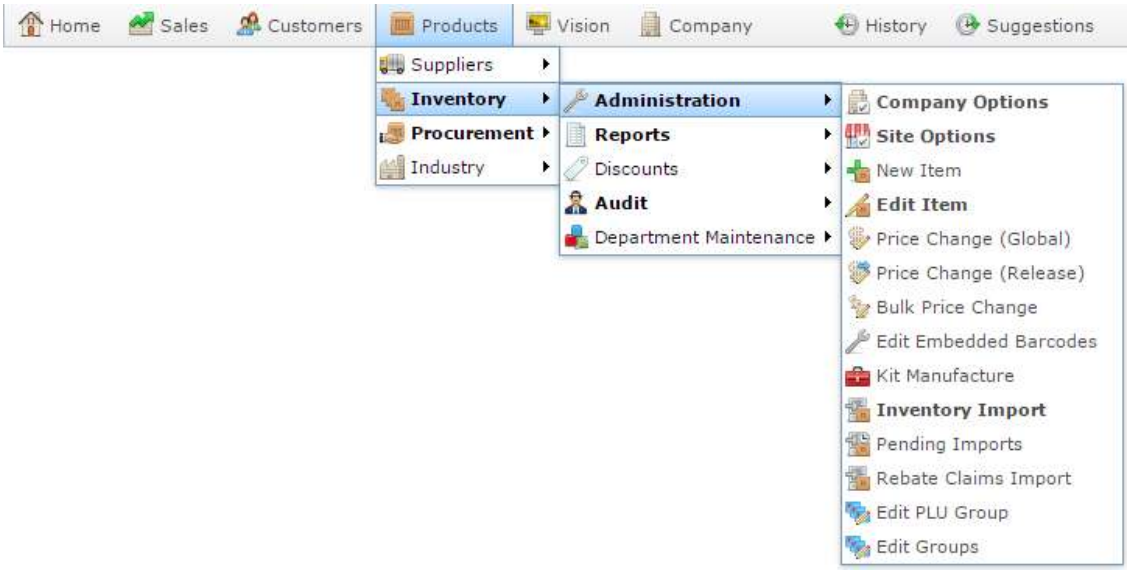
Use the Kit Maintenance screen to add and remove items from kits.

See *Creating a kit* on page 15.

Opening the Kit Maintenance screen

To open the Kit Maintenance screen:

1. Press Products in the main menu bar.
2. Press **Inventory** > **Administration** > **Edit Item**.



3. Search for the item you want to edit.

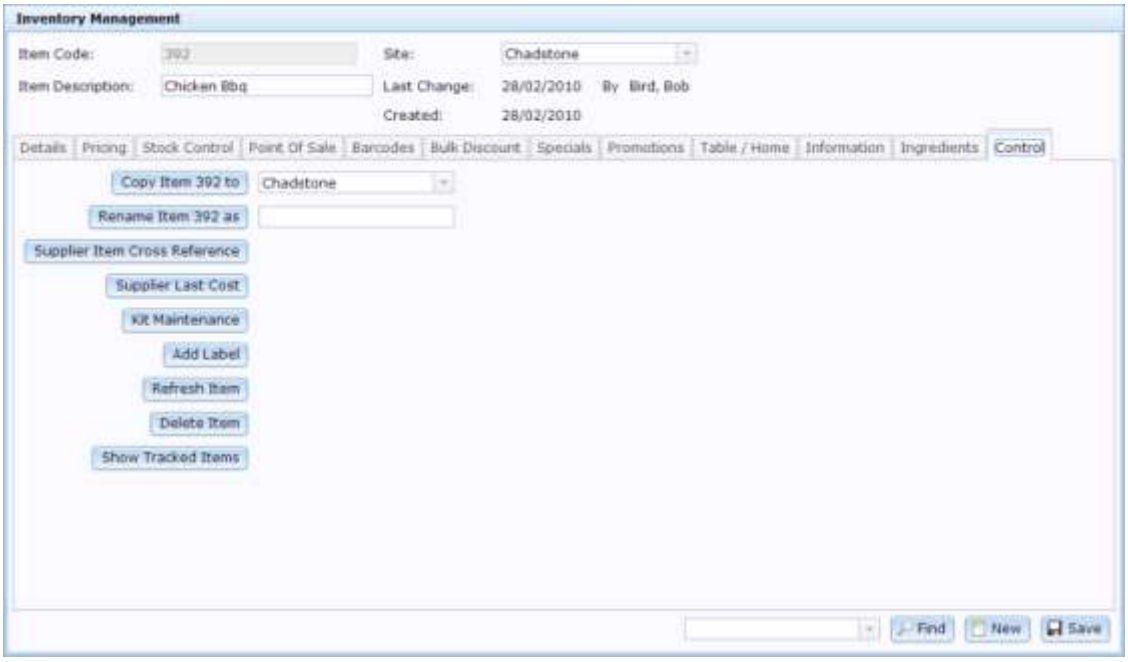
   See *Finding an item using the search screen* on page 50.

   Note: If you want to create a new item, see *Creating a new item* on page 47.

   The Details tab of the Inventory Management screen is displayed.

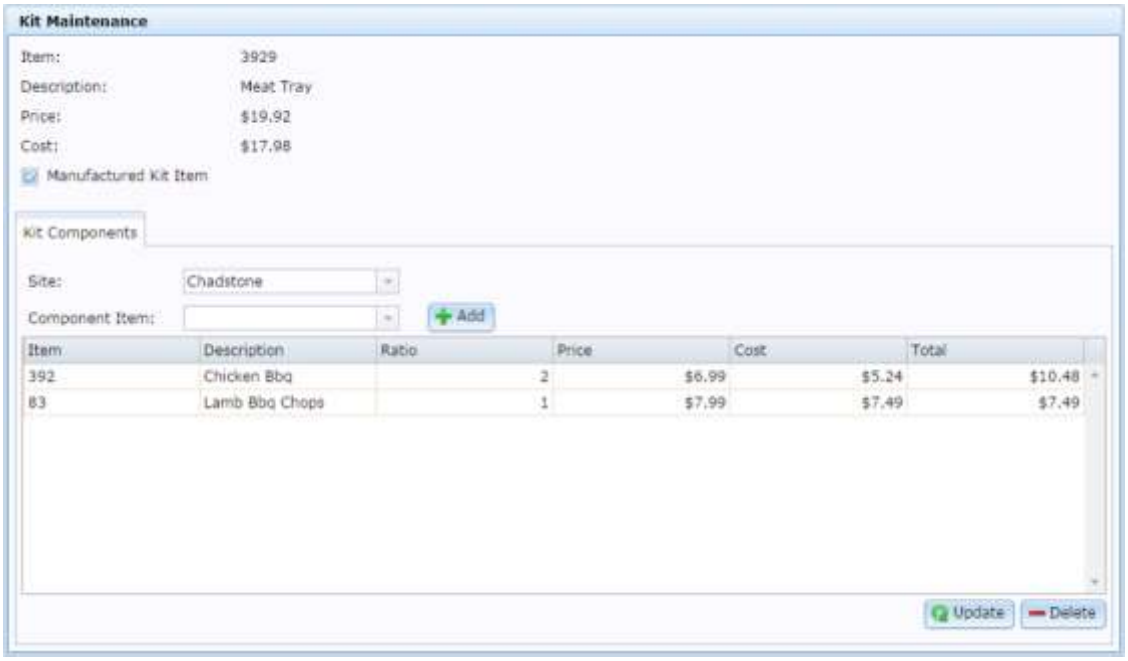
4. Press the Control tab.

   The Control tab of the Inventory Management screen is displayed..



5. Press Kit Maintenance.

The Kit Maintenance screen is displayed.



Kit Maintenance screen key fields and buttons

Information area

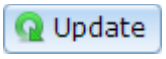
This area provides read-only information about the cost and description of the kit, and allows you to make the kit a manufactured or normal kit.

Field	Description
Item	The item code of the kit item.
Description	The kit item's description. See *Creating a new item* on page 47.
Price	The kit's price. See *Inventory Management - Pricing tab* on page 76.
Cost	The kit's cost, calculated by the cost of the component items. See *Inventory Management - Pricing tab* on page 76.
Manufactured Kit	Select to make this kit a manufactured kit. Clear to make this kit a normal kit. See *Managing referrals and kits* on page 8.

Component item area

This area allows you to add or remove component items from the kit, and create different kit combinations for different sites.

Field	Description
Site	Select the site you want to manage the kit item for. Different sites can have different kit combinations.
Component Item	Find an item to add to the kit. See *Finding an item with a search field* on page 56.
	Press to add the selected item to the kit.
Item	The item code of the component item.
Description	The component item's description.
Ratio	Type the number of units of this item you want to include per kit. **Note:** When a kit is manufactured, this item can be changed for each item when manufacturing a batch. See *Manufacturing kits* on page 21.
Price	The price of the component item as listed in the Pricing tab of Inventory Maintenance. See *Inventory Management - Pricing tab* on page 76
Cost	The cost of the component item, as listed in the Pricing tab of Inventory Maintenance.

Field	Description
	See *Inventory Management - Pricing tab* on page 76.
Total	The total cost of all units of this item being included in the kit. This is automatically calculated by multiplying the item's Ratio by the Cost.
	Press to update the item cost totals.
	Press to remove the selected component item from the kit. **Note:** If you update a kit that has less than two component items, the kit item is removed. See *Editing or removing a kit* on page 18.

Manufactured Kit Item report

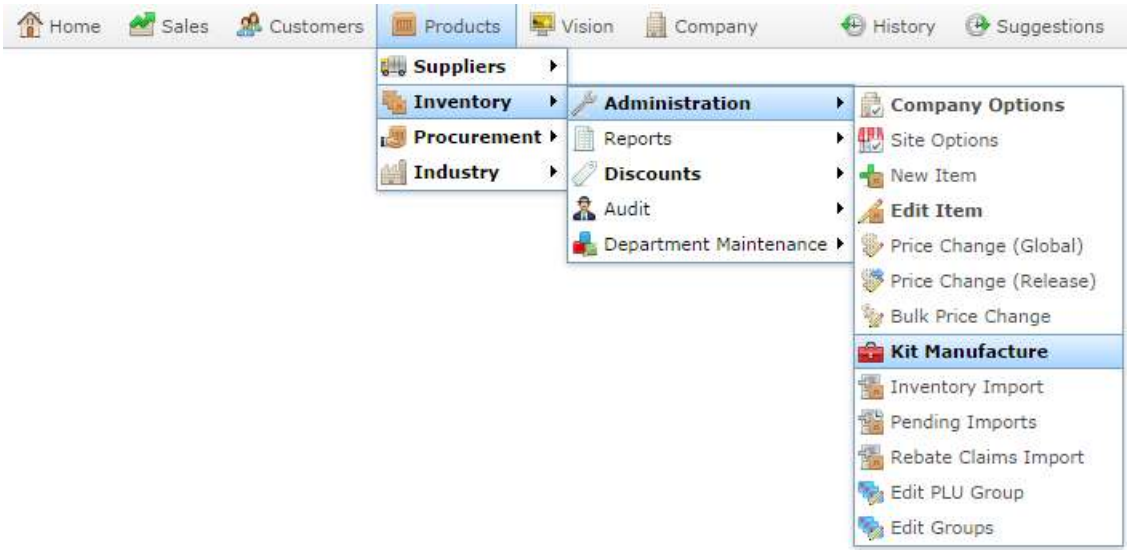
Use the Manufactured Kit Item report to view sales information on your kits and edit or manufacture the kits.

See *Manufacturing kits* on page 21Also see *Print kit batch information* on page 25

Opening the Manufacture Kit Item report

To open the Manufactured Kit Item report:

1. Press Products in the main menu bar.
2. Press **Inventory** > **Administration** > **Manufacture Kit**



The Kit Maintenance Report is displayed

Manufactured Kit Item Report key fields and buttons

Filters area

Use this area to filter the results shown in the report.

Field	Description
	Press to add this report to your Portal favourites for easier access.
Site	Select the site to report on.
Type	Select to change the report to other item criteria such as stock-on-hand levels.
Supplier / Creditor	Select to restrict the report to a particular supplier, or to items where the supplier has not been selected.
Item Type	Select to filter the report by item type.
Department	Select to filter the report by department.

Report area

This area displays report information.

Note: Not all fields may be displayed at once. Some fields depend on your filter field selections.

Field	Description
Item / Description	Description of the item. **Note:** Click on the description to access other options in a popup menu.
Item Number / Item	The item code of the item.
Cost (Ex) / Cost Ex	The item cost, not including tax. See *Inventory Management - Pricing tab* on page 76.
Cost (Inc)	The item cost including tax. See *Inventory Management - Pricing tab* on page 76.
Retail / Retail Price	The retail price of the item. See *Inventory Management - Pricing tab* on page 76.
SOH	The stock-on-hand of the item.
Profit %	The profit as a percentage of the item's retail price. See *Inventory Management - Pricing tab* on page 76.

Field	Description
Margin %	The margin of the item. See *Inventory Management - Pricing tab* on page 76.
Profit	The profit of the item per unit. See *Inventory Management - Pricing tab* on page 76.
Profit (Ex)	The profit of the item per unit, excluding tax. See *Inventory Management - Pricing tab* on page 76.
On Order	The number of units on order. See *Inventory Management - Stock Control tab* on page 81.
Kit	Selected if this item is a kit item. See *Managing referrals and kits* on page 8.
Manufactured Kit Item	Selected if this item is a manufactured kit item. See *Managing referrals and kits* on page 8.
Referred	Selected if this item refers to another item. See *Managing referrals and kits* on page 8.
POS	Selected if this item is available at the Point of Sale system. See *Inventory Management - Point of Sale tab* on page 88.
Small Item	Selected if this item is too small to have a barcode. See *Inventory Management - Point of Sale tab* on page 88

Field	Description
Date Last Sale	The date this item was last sold.
Account	Creditor code of the supplier.

Manufacture Kit screen

Use the Manufacture Kit screen to:

- manufacture new batches of manufactured kit items

  See *Manufacturing kits* on page 21.

- view and print previous batches of kits.

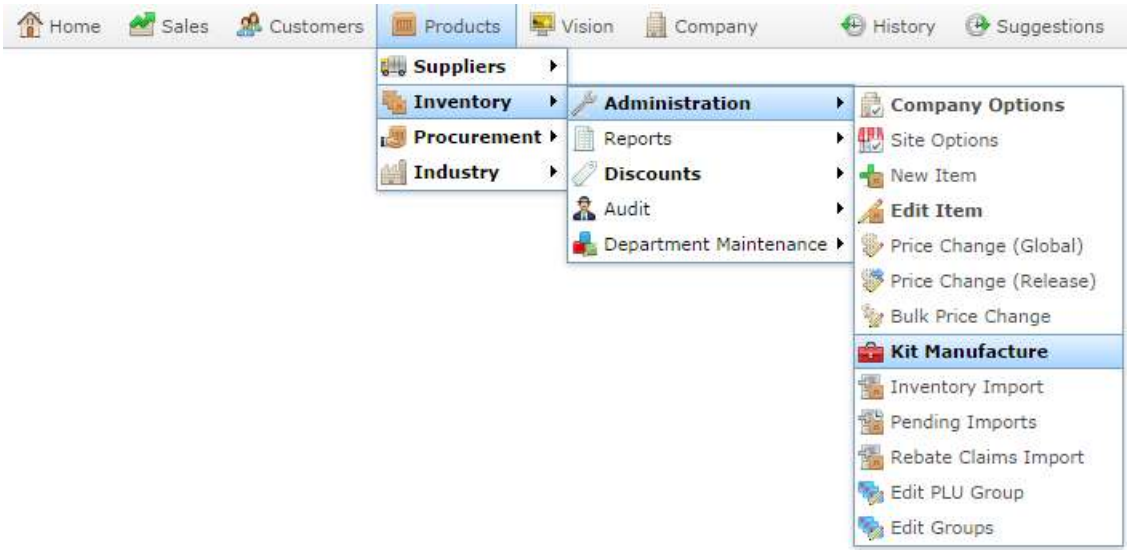
  Print kit batch information on page 25.

For more information on kits, see *Managing referrals and kits* on page 8.

Opening the Manufacture Kit screen

To open the Manufacture Kit screen:

1. Press Products in the main menu bar.
1. Press **Inventory** > **Administration** > **Manufacture Kit**



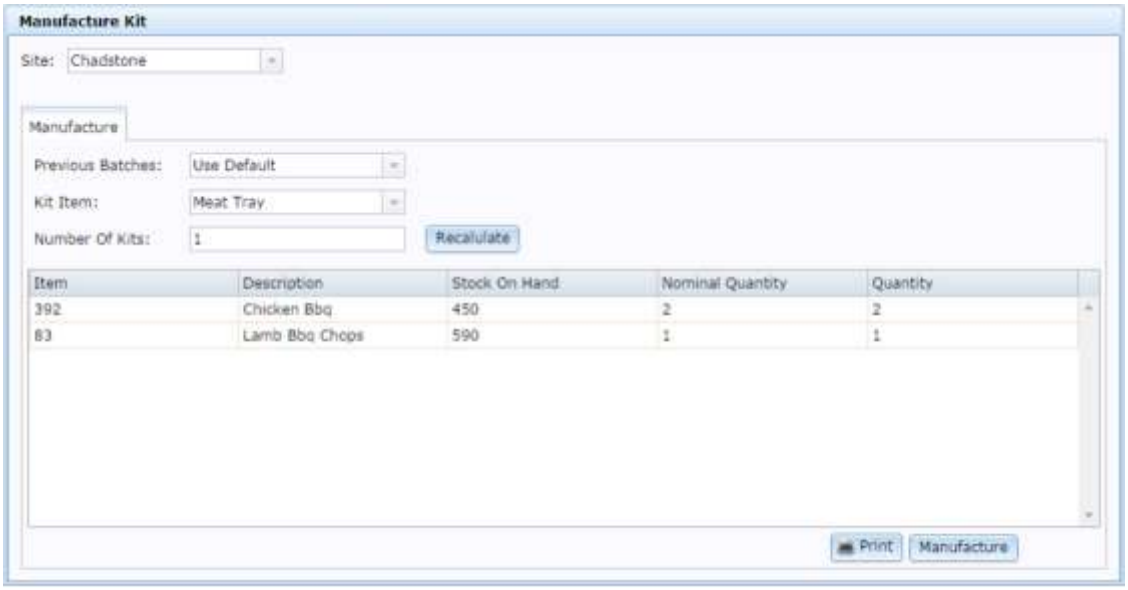
The Kit Maintenance Report is displayed

2. Press the name of the kit you want to manufacture.

   A popup menu is displayed.

3. Select **Manufacture**.

   The Manufacture Kit screen is displayed.



Manufacture Kit screen key fields and buttons

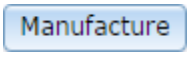
Batch area

Use this area to select the site, batch and kit you want to manufacture, and the number of kit items you want to create.

Field	Description
Site	Select the site you want to manufacture kit items for. **Note:** Different sites may have different component item ratios for the kit.
Previous Batches	If you want to duplicate a previous batch, select it from the drop-down list. You can also select: **Use Default** — Manufacture kits using the normal component item ratios defined in Kit Maintenance. See *Kit Maintenance screen* on page 31. **Average** — Manufacture kits using the quantities averaged from previous batches.
Kit Item	Select the kit you want to manufacture. **Note:** The kit item must be a manufactured kit to be manufactured. See *Creating a kit* on page 15.
Number Of Kits	Type the number of kits you want to manufacture. **Note:** This updates the Quantity field in the Component grid. To ensure the correct number of units is used, you should only update this field after you have many any changes to the component item **Quantity** field below.

Component area

Use this area to control the ratio of component items within the kit for the batch you want to manufacture.

Field	Description
Item	The item code of the component item.
Description	The item description of the component item.
Stock On Hand	The stock-on-hand at this site for this component item.
Nominal Quantity	The number of units required to manufacture the selected **Number Of Kits** if using the normal component item ratios for this kit. See *Kit Maintenance screen* on page 31.
Quantity	Type a new quantity to change the number of units of a component item included in a kit. **Note:** This quantity represents the total number of units to be used. To check the number of units used per kit, divide this number by the **Number Of Kits** you want to create.
	Press to print the details of the selected batch. If the batch has already been manufactured, the date and batch number are included.
	Press to manufacture a batch of the selected kit. The batch is automatically stored by date and batch number for later retrieval. **Note:** You cannot undo kit manufacture. Check that your numbers are correct before manufacturing kits.

Inventory maintenance

Inventory maintenance is used to maintain details about all of the items your organisation needs to track.

Items are uniquely identified by an item code.

What you can do:

Use Inventory Maintenance to:

- Create items to represent your stock, processes or other business requirements.

  See *Creating a new item* on page 47.

  Also see *Creating an item that does not track stock* on page 60.

- Find and edit items.

  See *Finding an item using the search screen* on page 50.

  Also see *Finding an item with a search field* on page 56.

  Also see *Copying an item to another site* on page 58

- Delete items.

  See *Inventory Management - Control tab* on page 122.

- Combine and split items in kits and referrals.

  See *Managing referrals and kits* on page 8.

- Add options and modifiers to items.

  See *Managing item options and modifiers* on page 156.

- Create bulk discounts for items.

  See *Managing bulk discounts*.

Also see:

- *Inventory Management - Details tab* on page 72.
- *Inventory Management - Pricing tab* on page 76
- *Inventory Management - Stock Control tab* on page 81.
- *Inventory Management - Point of Sale tab* on page 88.
- *Inventory Management - Barcodes tab* on page 93.
- *Inventory Management - Bulk Discount tab* on page 96.
- *Inventory Management - Specials tab* on page 100.

- *Inventory Management - Promotions tab* on page 104.
- *Inventory Management - Table / Home tab* on page 108.
- *Inventory Management - Information tab* on page 112.
- *Inventory Management - Ingredients tab* on page 117.
- *Inventory Management - Control tab* on page 122.

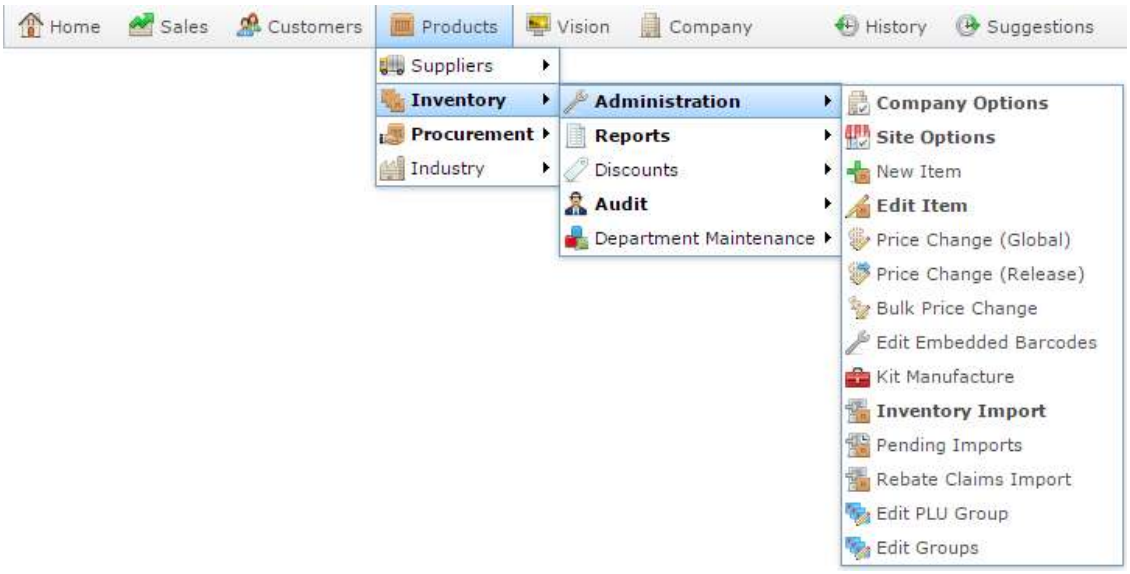
Creating a new item

Create a new item to represent a product or service that you want to manage through the Portal.

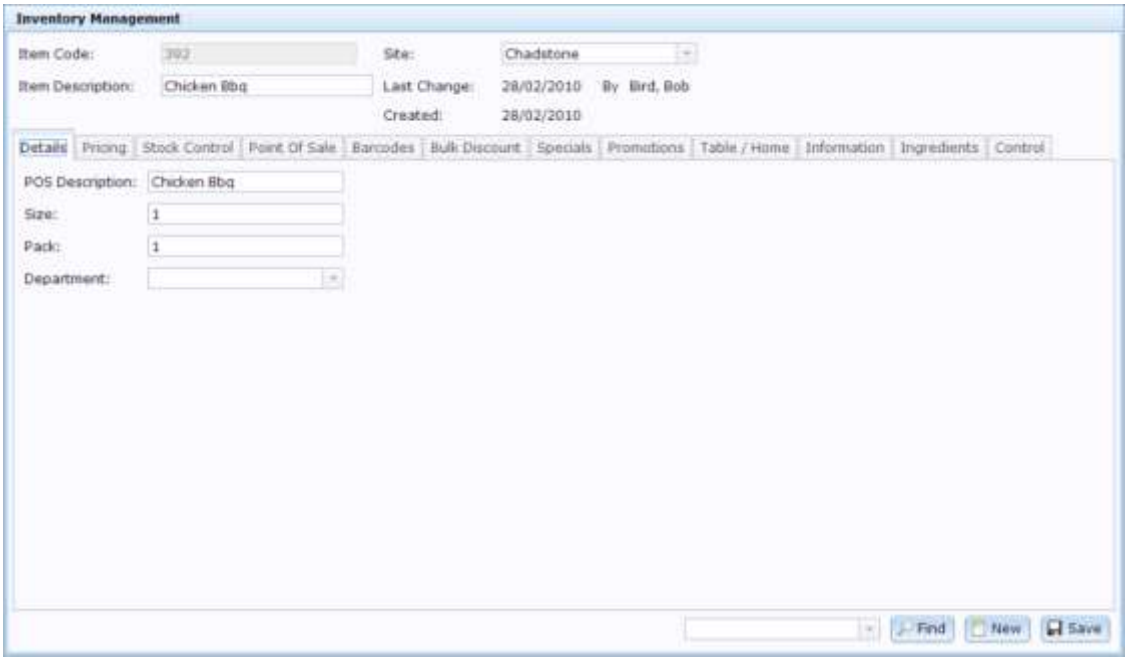
> **Note:** Creating a new item is not the same as receipting stock or increasing the quantity of an existing item. An item defines a particular product or service that you manage through the Portal. The item's quantity or stock-on-hand describes how many units of that item you have available.

To create a new item:

1. Press Products in the main menu bar.
2. Press **Inventory** > **Administration** > **New Item**.



The Inventory Management screen is displayed.



3. Type a unique code for the item in the **Item Code** field.

> **Note:** If your Portal configuration is set to automatically generate item codes for new items, leave the Item Code field blank. See *Company options - Inventory*.

4. Type a description of the item in the **Item Description** field.

> **Note:** This is the description for the item that appears in Portal search results. It is not the description that appears on the Point of Sale.

5. Select the **Site** you want to configure the item for.

> **Note:** Items can belong to multiple sites, and have different information for different sites. For example, an item might have a lower price at a factory outlet site. You can copy the item's information to other sites using the Control tab. See *Copying an item to another site* on page 58.

6. Select the Details tab, if not already selected.
7. Type the description that should appear when the item is sold on the Point of Sale in the **POS Description** field.
8. Type the number of units included per pack ordered from the supplier in the **Pack** field.
9. Select the **Department** that the item belongs to.

> **Note:** Your Portal configuration may used another name for this field.

10. See *Inventory Management - Details tab* on page 72.

11. Configure the information on each of the tabs:
    - For price and tax levels, see *Inventory Management - Pricing tab* on page 76.
    - For replenishment and stock take controls, see *Inventory Management - Stock Control tab* on page 81.
    - For point of sale discounts, storage and labels, see *Inventory Management - Point of Sale tab* on page 88.
    - For barcodes, see *Inventory Management - Barcodes tab* on page 93.
    - To manage bulk discounts for the item, see *Inventory Management - Bulk Discount tab* on page 96.
    - To manage specials for the item, see *Inventory Management - Specials tab* on page 100.
    - To view promotions the item is involved in, see *Inventory Management - Promotions tab* on page 104.
    - For table service, modifier groups and home shopping, see *Inventory Management - Table / Home tab* on page 108.
    - For brand, style, colour and fashion information, see *Inventory Management - Information tab* on page 112.
    - For ingredients and nutritional information, see *Inventory Management - Ingredients tab* on page 117
    - For additional functions such as supplier cross references, kit maintenance and copying item information across sites, see *Inventory Management - Control tab* on page 122.

    Note: Depending on your Portal configuration, some tabs may be unavailable. See *Configuring inventory options for your company*.

12. Copy the item information across to the remaining sites in your company, if required.

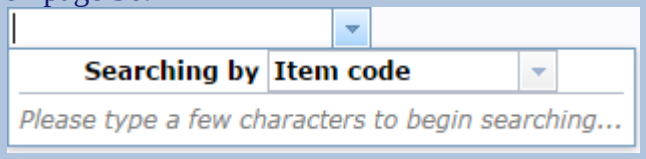
    See *Copying an item to another site* on page 58.

    Note: You can edit this information once it has been copied across.

Finding an item using the search screen

Find an item when you want to edit its configuration in Inventory Management.

Note: This topic describes using the search screen to find items. If you are trying to find an item in a search field within another screen, see *Finding an item with a search field* on page 56.

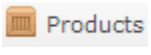


You can either:

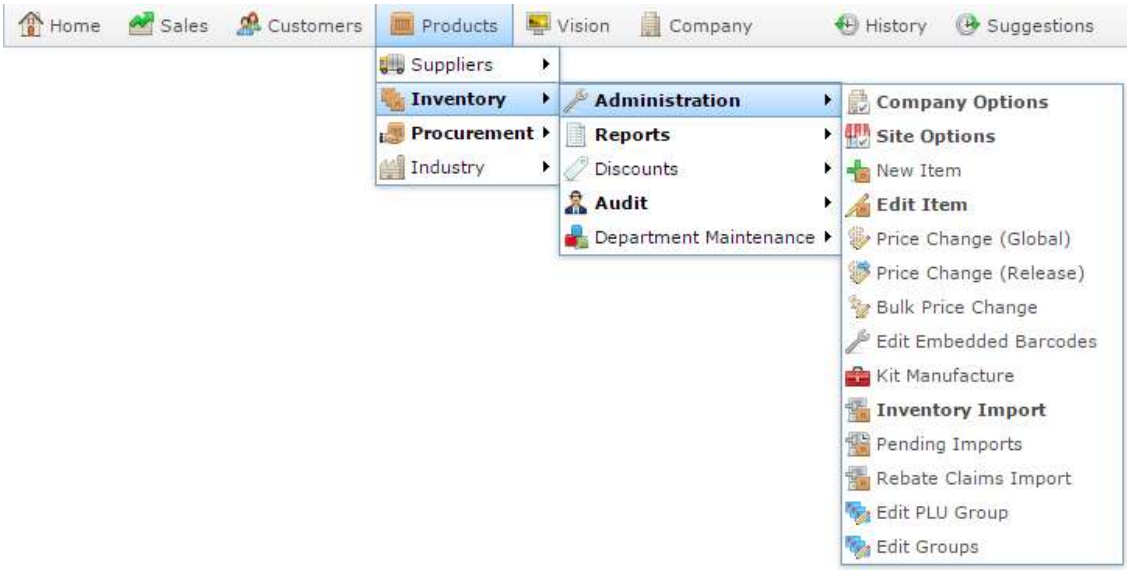
- list all items starting with a chosen letter
- search for an item by typing information in the search fields.

Opening the Find Item screen

To search for items, you first must open the Find Item screen:

1. Press  in the main menu bar.

2. Press **Inventory** > **Administration** > **Edit Item**.



3. Search for the item you want to edit.

   See *Finding an item using the search screen* on page 50.

   The Find Item screen is displayed.

Find Item
Searching For Items At:
Chadstone
Department:
All
Custom
A B C D E F G H I J K L M N O P Q R S T U V W X Y Z
Please choose a field to search on
Description:
Item Code:
Barcode:
Cross Reference:
Search

Listing all items by letter:

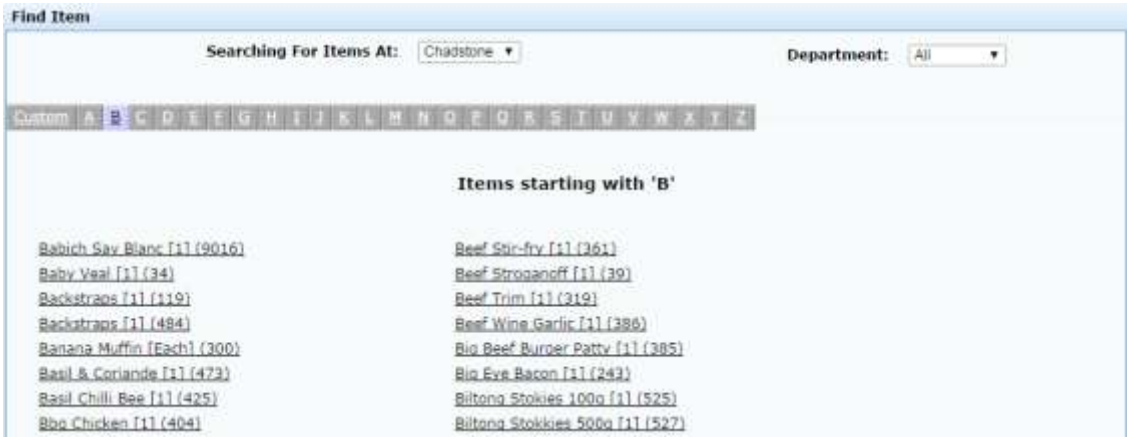
To list items that start with a specific letter alphabetically:

1. Select the site you want to search from the **Searching For Items At** drop-down list.

2. If you want to restrict your search to a single department, select it from the **Department** drop-down list.

3. **Note:** Your Portal configuration may used another name for this field.
4. Press the corresponding letter of the alphabet at the top of the search screen.

The items that start with that letter are listed alphabetically.



Searching for items

You can search for an item based on its item description, item code, barcode or supplier cross reference number. The Portal searches for matches:

- Anywhere within the words of the field.

  For example, **APP** matches both **apple**, and **pineapple**, and a search for a barcode of **33** returns all items with barcodes that contain 33. If a field contains multiple words, it matches any word in the field.

- From the start of the item code.

  For example, a search for an item code of **3** returns all item codes starting with 3, not all item codes that contain 3.

- Using the first search field that contains data.

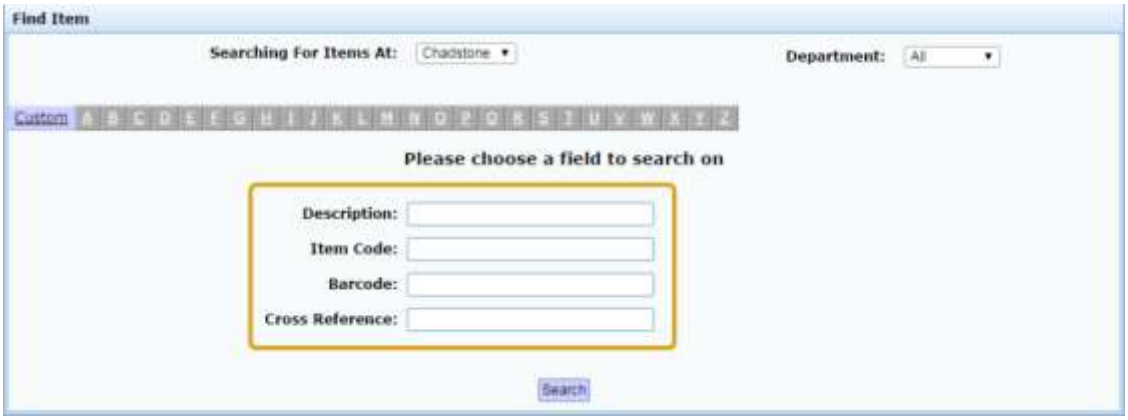
  For example, if you type **APP** in the **Description** field and **3** in the Item Code field, the Portal ignores the **Item Code** field and searches for items that have a word in the description starting with **APP**.

Note: An item's description is not the same as the description that appears in the Point of Sale. If you have difficulty locating an item, make sure you are using the correct description. See *Inventory Management - Details tab* on page 72. Also see *Creating a new item* on page 47.

To search for items:

1. If the custom search fields are not displayed, press the Custom tab.

2. Type the term you want to search on in the search fields.



> **Note:** Because the Portal uses the first field with data that it finds, you should only search for items using one search field at a time.

3. Press Search.

   The search results are displayed.

Finding an item with a search field

Find an item using a search field when you need to add that item during a procedure, such as creating a promotion group.

Note: If you are searching for an item using the whole screen rather than just a field, see *Finding an item using the search screen* on page 50.

You can search for an item based on its:

- item code, or partial item code
- description or partial description
- barcode.

Note: The Portal requires the search term to be at least three characters long, so choose a search term that uses at least three characters. For example, if your item's item code is only two digits long, you should search on description or barcode instead.

Partial search terms

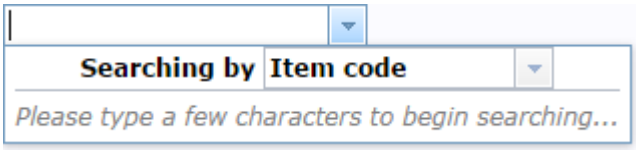
If you search based on an item's code or description, the Portal attempts to match your search term to the beginning of the item code, or the beginning of each word in the description. For example, **300** matches with all item codes starting with 300, and **APP** matches with apple, but not pineapple.

If you search based on a partial item code or partial description, the Portal attempts to match your search term to anywhere within the item code, or anywhere within the description. For example, **300** matches any item code that contains 300, and **APP** matches both apple and pineapple.

Searching for items

To search for an item:

1. Press within the search field to open the additional search options.



2. Select the field you want to search by.
3. Type your search term.

   The results are displayed below the search field.

4. Press an item to select it.

Copying an item to another site

You can copy an item's configuration across multiple sites using the Control tab in Inventory Maintenance. This saves you having to set the item up all over again for each of your sites, while still allowing you to have different configurations for an item per site.

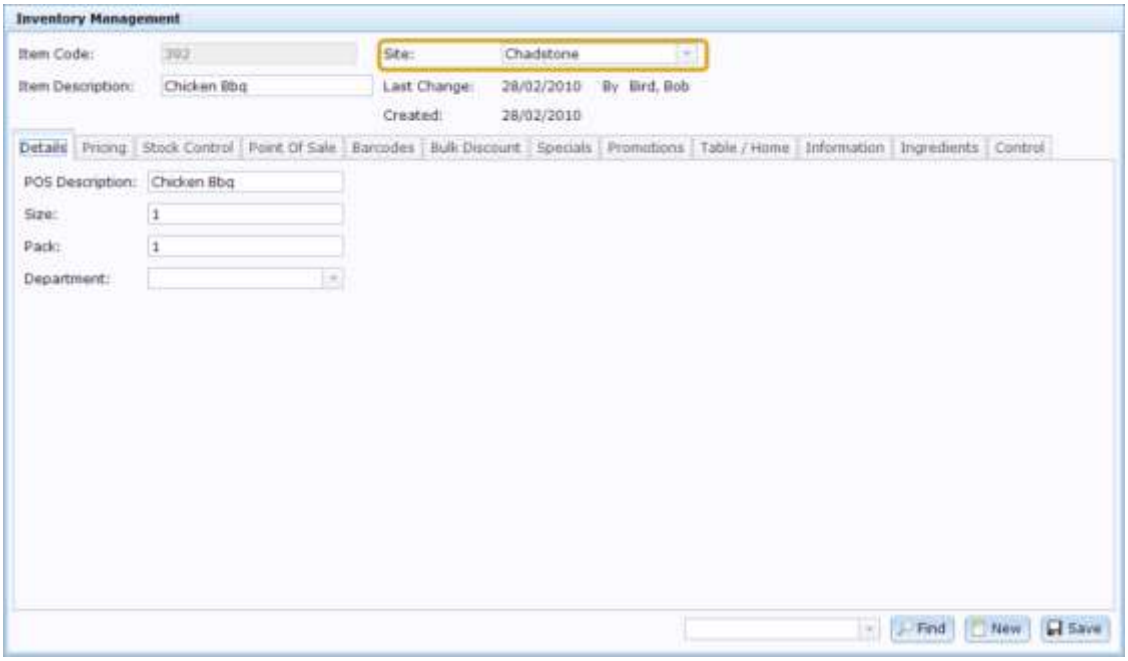
You can copy an item to another site at any time. Copying the item does not overwrite any existing configuration for the item in the site you're copying to. Any changes you make to an item after copying it are not carried across to other sites.

To copy an item configuration to another site:

1. Find the item in Inventory Maintenance.

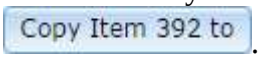
   See *Finding an item using the search screen* on page 50.

2. Select the Site you want to copy from.

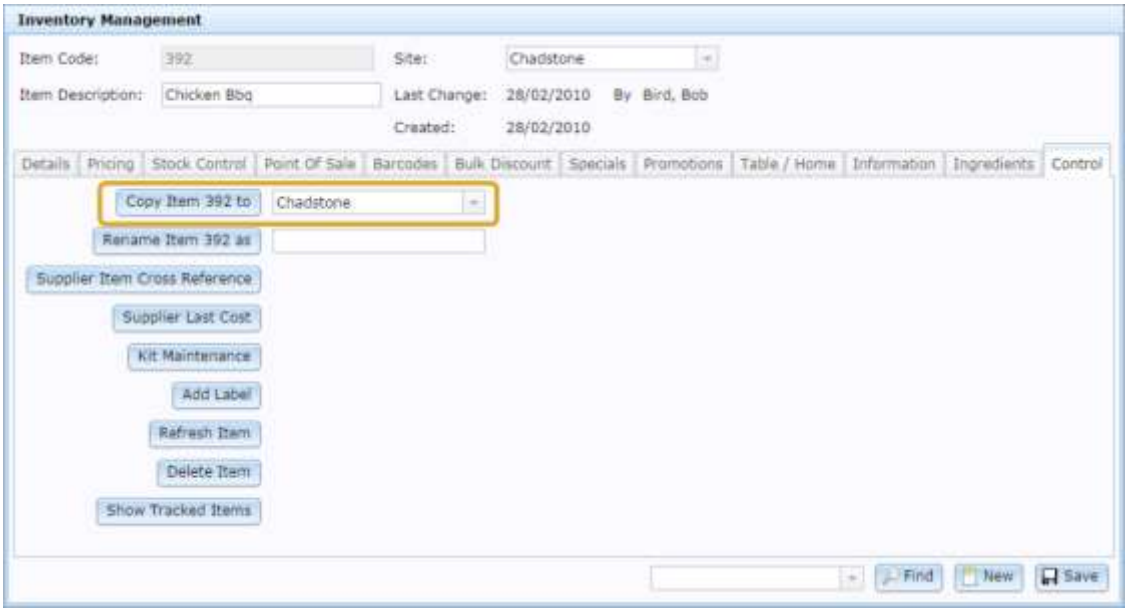


3. Press the Control tab.

   The Control tab is displayed.

4. Select the site you want to copy the item to from the drop-down list next to 

.

5. 

> **Note:** Any existing configuration for the item at this site is not overridden.

6. Press Copy Item 392 to.

   The item configuration is copied to the selected site. You can now edit the details of the item.

Creating an item that does not track stock

You may have items for which you do not want to track stock. These may be items such as service charges, hourly rates, additional preparation methods, or physical items that are depleted so gradually it is easier to track and replenish stock manually.

To create an item that does not track stock:

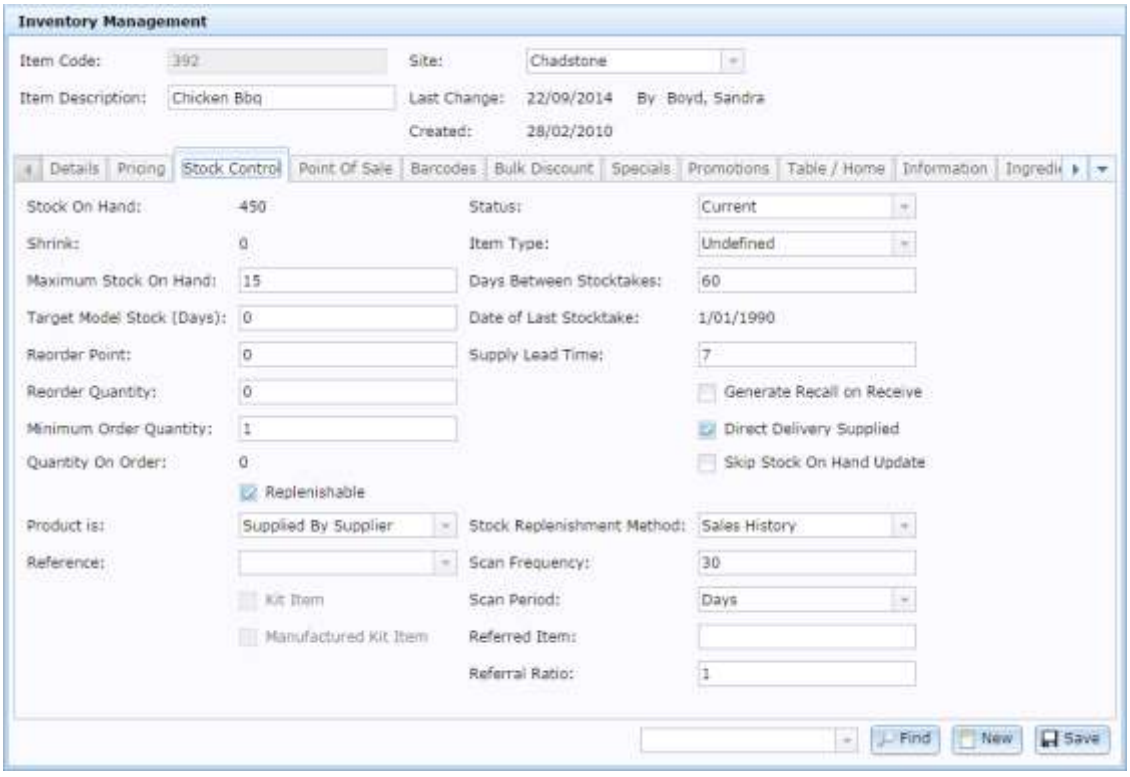
1. Find or create the item you want to be a prime item.

   See *Finding an item using the search screen* on page 50.

   Also see *Creating a new item* on page 47.

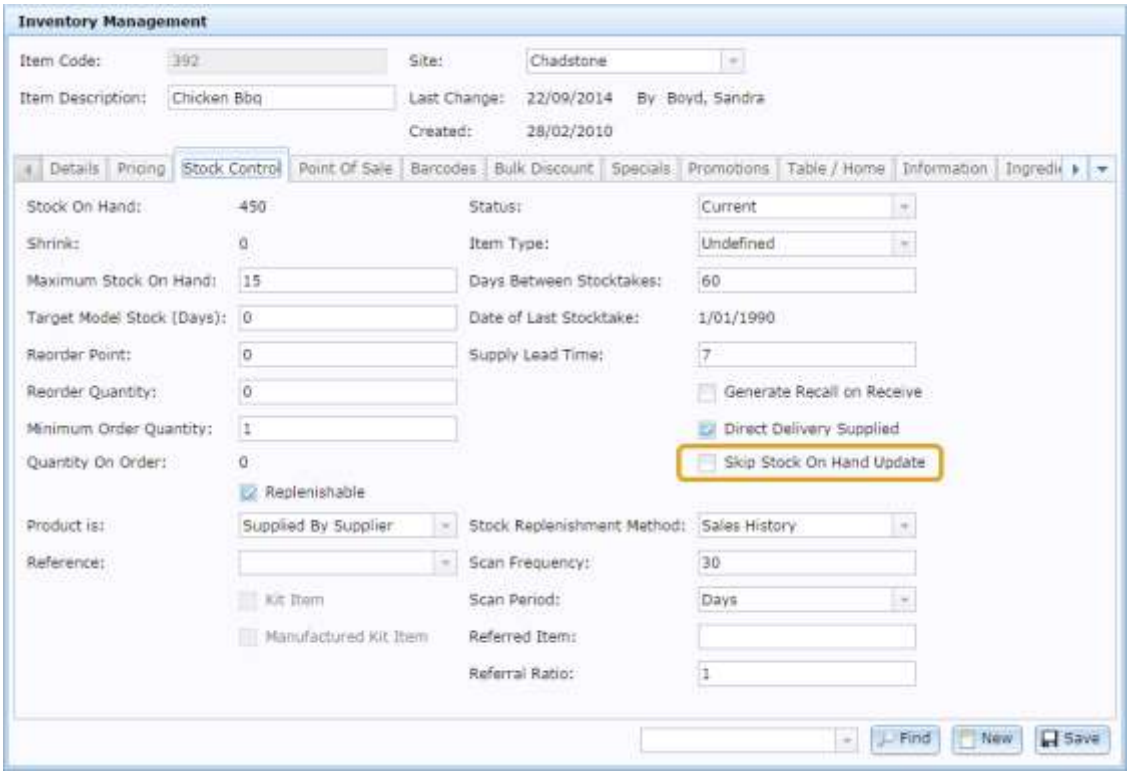
2. In Inventory Maintenance, press the Stock Control tab.

   The Stock Control tab is displayed.



   See *Inventory Management - Stock Control tab* on page 81.

3. Select the **Skip Stock On Hand Update** field.



4. Press Save.

   The stock is not tracked for this item.

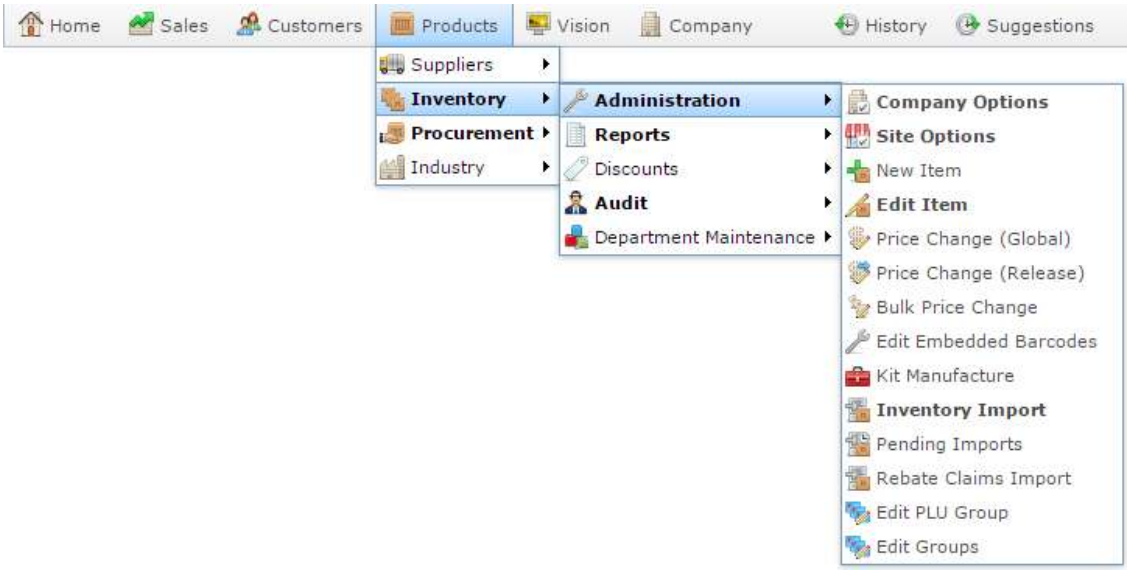
Changing an item's price manually

Change an item's price manually when you want a price edit to take effect immediately for a specific site.

> **Note:** Updates do not appear on Point of Sale terminals until the item has been refreshed. Item updates are performed periodically. If you need to send the changes to the Point of Sale terminals immediately, refresh the item. See *Refreshing an item on the Point of Sale* on page 64.

To change an item's price manually:

1. Press Products in the main menu bar.
2. Press **Inventory** > **Administration** > **Edit Item**.



3. Search for the item you want to edit.

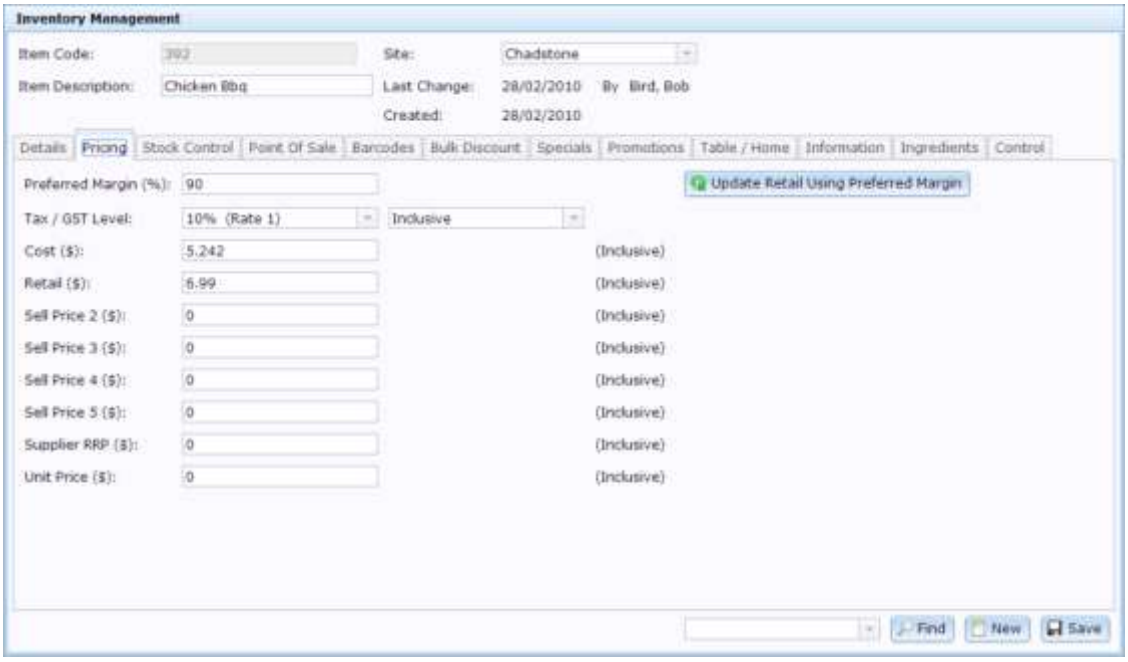
   See *Finding an item using the search screen* on page 50.

   > **Note:** If you want to create a new item, see *Creating a new item* on page 47.

   The Details tab of the Inventory Management screen is displayed.

4. Press the Pricing tab.

   The Pricing tab of the Inventory Management screen is displayed.



See *Inventory Management - Pricing tab* on page 76.

5. Change the prices using the fields as required.
6. Press Save.

   The new prices are saved.

Refreshing an item on the Point of Sale

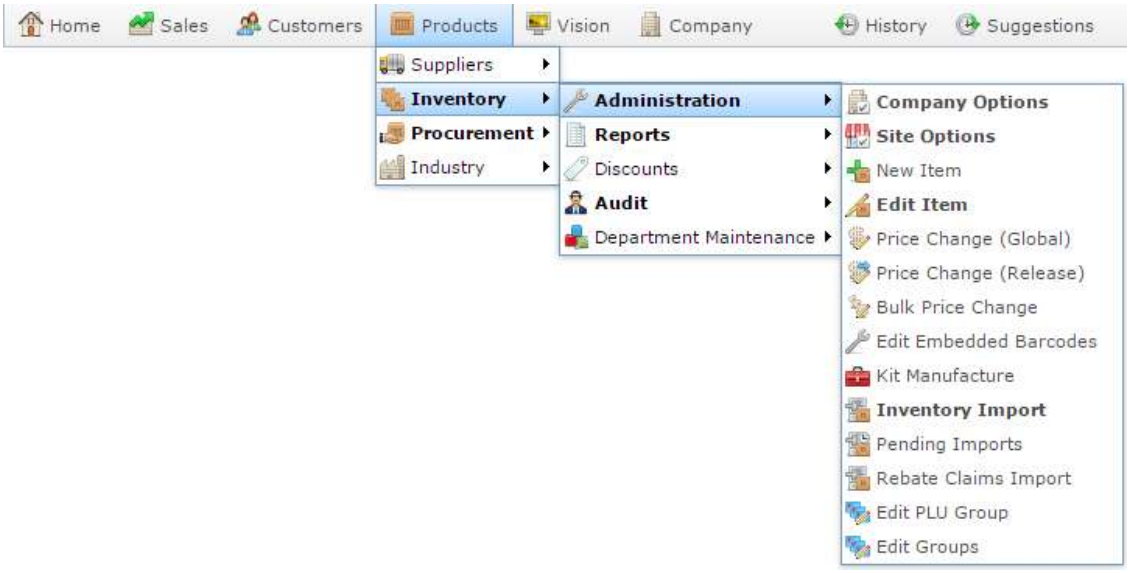
Refresh an item on the Point of Sale when you have changed the item using Inventory Maintenance but the changes aren't apparent in the Point of Sale.

Note: The Point of Sale automatically refreshes all changed items over a period of time. Only use this procedure if you need the update on the Point of Sale immediately, or you think the change has not come across.

Note: If there are many updates at once, changes may take longer to appear in the Point of Sale. See *Checking the site update queue* on page 66.

To refresh an item on the Point of Sale:

1. Press Products in the main menu bar.
2. Press **Inventory** > **Administration** > **Edit Item**.



3. Search for the item you want to edit.

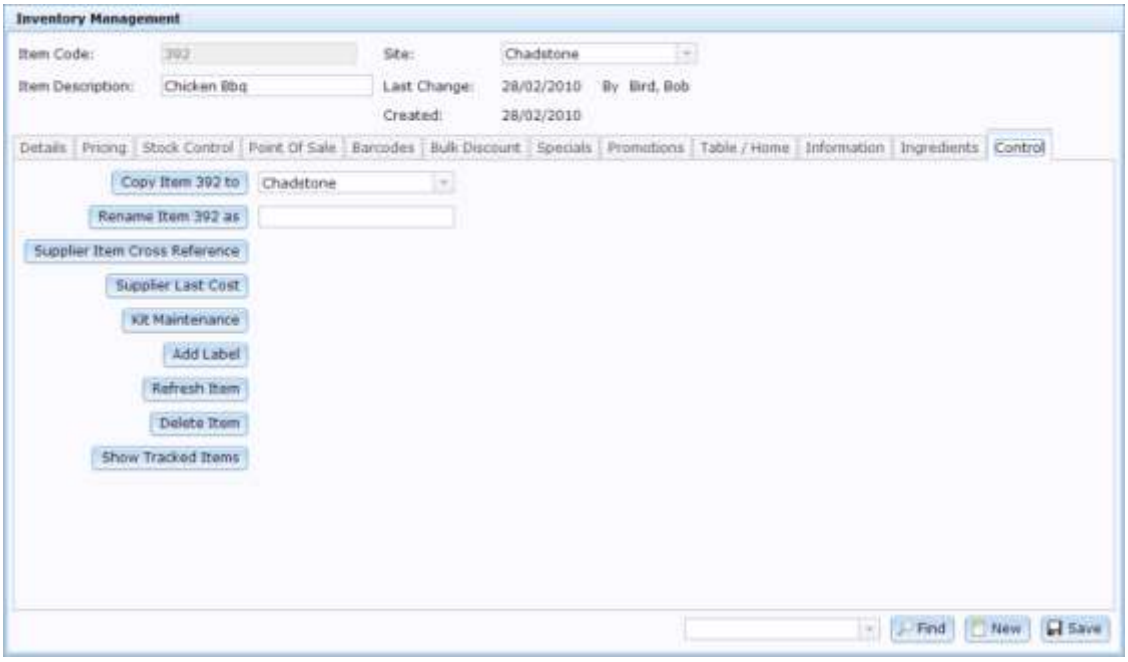
   See *Finding an item using the search screen* on page 50.

   Note: If you want to create a new item, see *Creating a new item* on page 47.

   The Details tab of the Inventory Management screen is displayed.

4. Press the Control tab.

   The Control tab of the Inventory Management screen is displayed.

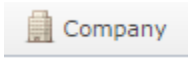


5. Press Refresh Item.
6. The item is added to the terminal update queue.

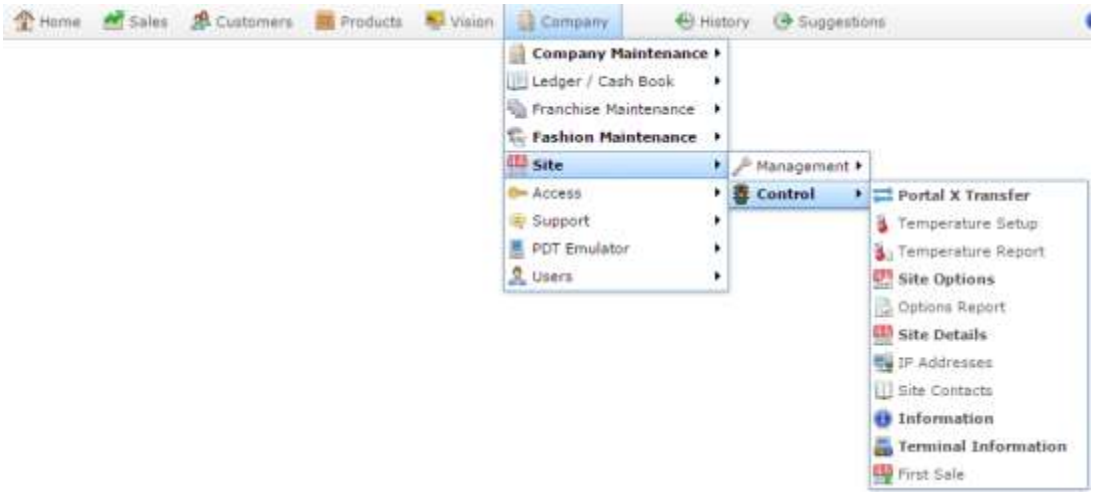
Checking the site update queue

The Portal uses a queue system to send updates to the sites and terminals. If there are many updates at once, some changes may take some time to appear on the sites or terminals. You can check whether there are many pending updates on the Site Details screen.

To check for pending updates:

1. Press 

in the main menu bar.
2. Press **Site > Control > Site Details**.



The Site Details screen is displayed.

3. Check the following fields to see how many items have pending updates for each site:

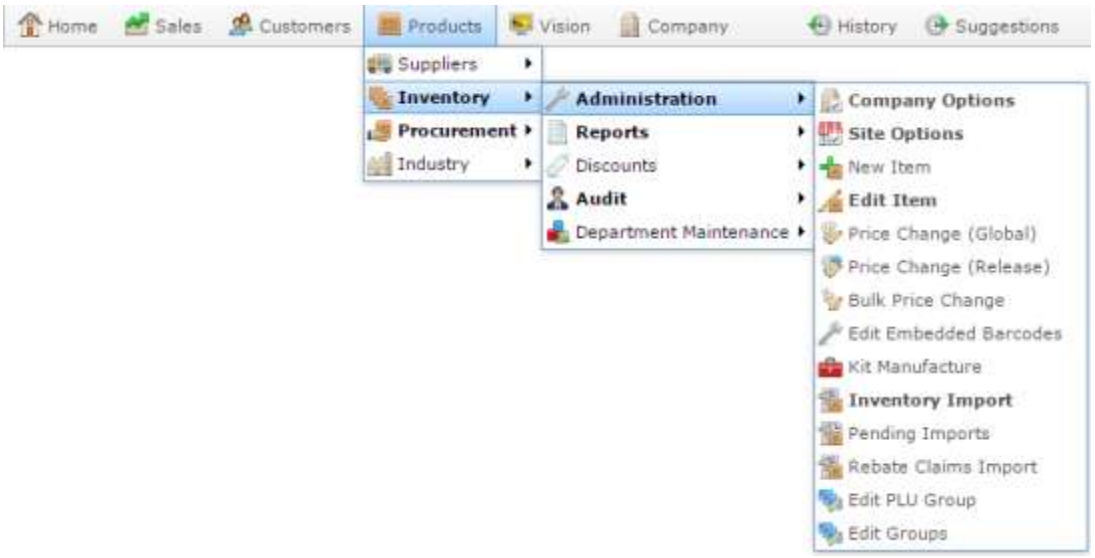
Field	Description
Pending Portal -> Site	The number of item updates to be sent from the portal to other sites.
Pending Portal -> Portal	The number of item updates to be sent from this portal to other company portals.
Pending Portal -> Terminal	The number of item updates to be sent from the portal to the site's Point of Sale terminals.

Importing items into your inventory from a file

You can import items from a file into your inventory using the Portal file upload.

To import items into your inventory:

1. Press Products.
2. Press **Inventory > Administration > Inventory Import**.



The Online Inventory Upload / Price Change screen is displayed.

3. Press Browse....

   An Open File popup screen is displayed.

4. Choose the file you want to upload.

   The name of the file is displayed in the **Filename** field.

5. Press Update.

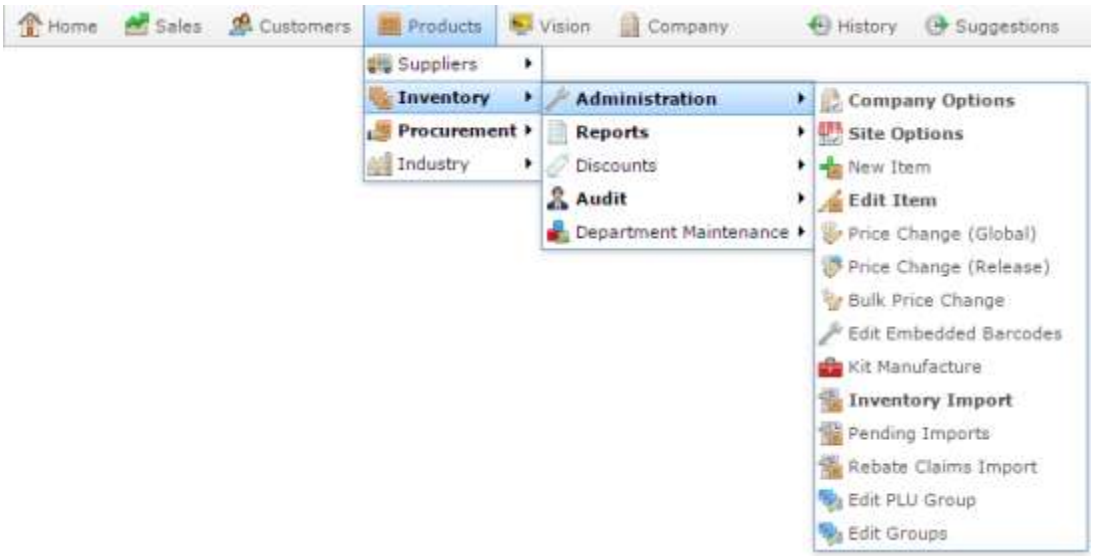
   The Portal begins uploading the file.

Importing new item prices from a file

You can override item prices from a file using the Portal file upload.

To import item prices into your inventory:

1. Press Products.
2. Press **Inventory > Administration > Inventory Import**.



The Online Inventory Upload / Price Change screen is displayed.

3. Press Browse....

   An Open File popup screen is displayed.

4. Choose the file you want to upload.

   The name of the file is displayed in the **Filename** field.

5. Press Update.

   The Portal begins uploading the file.

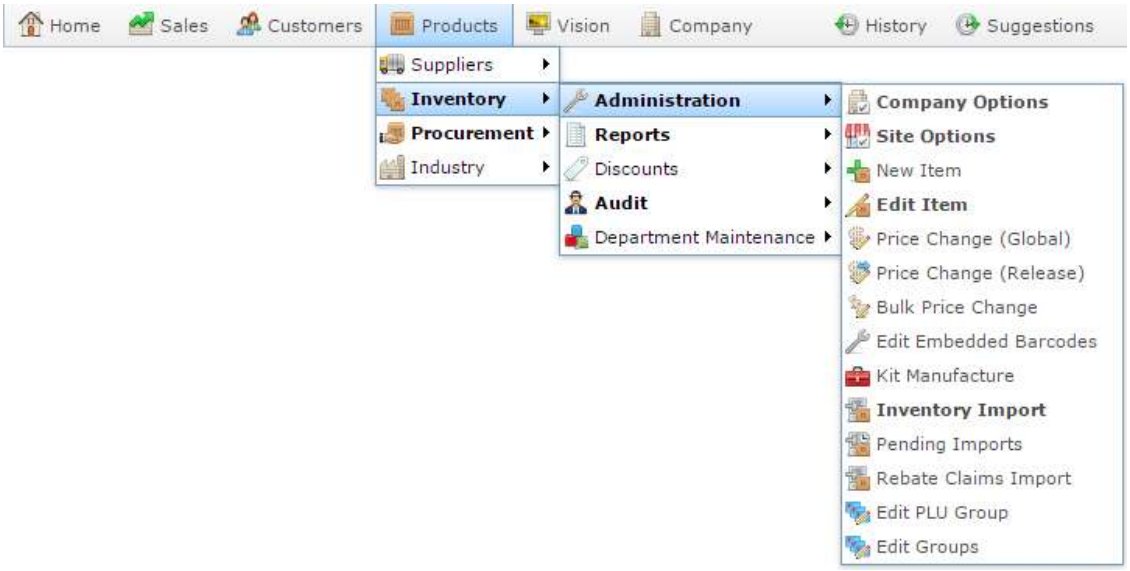
Assigning an item to an item type

You can assign items to item types to categorise items for reporting.

> **Note:** You must first create the item types you want to assign the item to. See *Creating a new item type*.

To assign an item to an item type:

1. Press Products in the main menu bar.
2. Press **Inventory** > **Administration** > **Edit Item**.



3. Search for the item you want to edit.

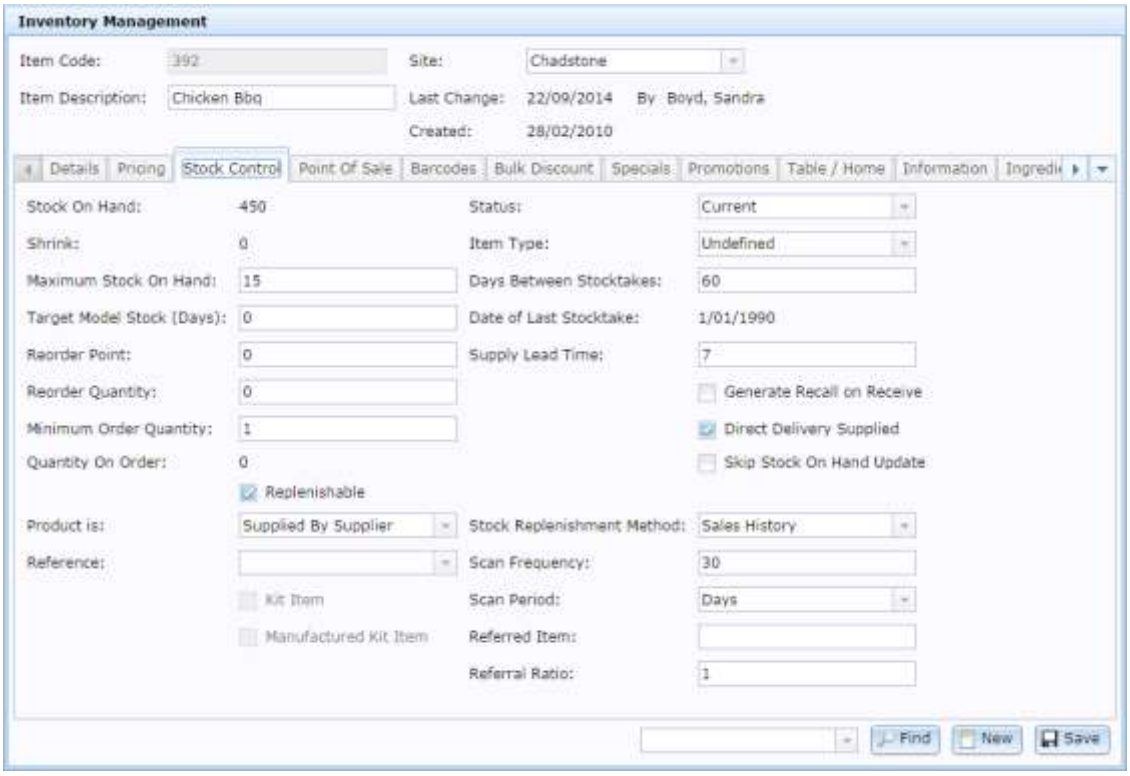
   See *Finding an item using the search screen* on page 50.

   > **Note:** If you want to create a new item, see *Creating a new item* on page 47.

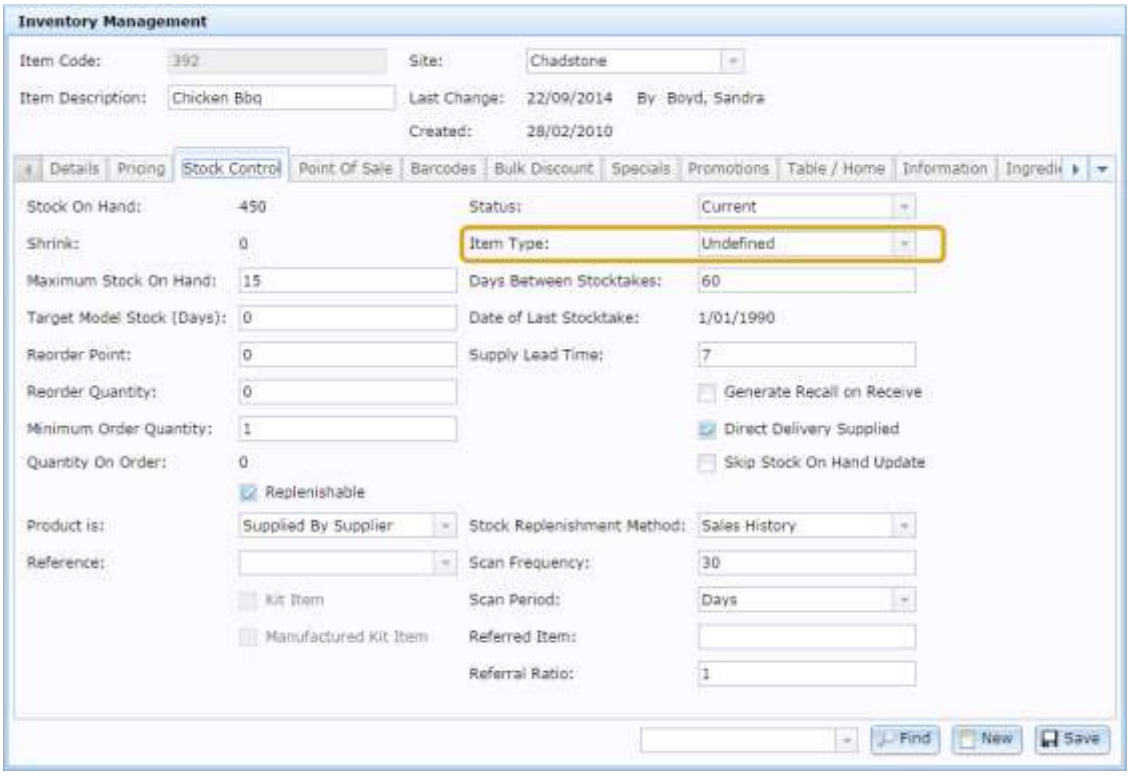
   The Details tab of the Inventory Management screen is displayed.

4. Press the Stock Control tab.

   The Stock Control tab of the Inventory Management screen is displayed.



5. Select the item type you want to assign in the **Item Type** drop-down field.



6. Press Save.

   The item is assigned.

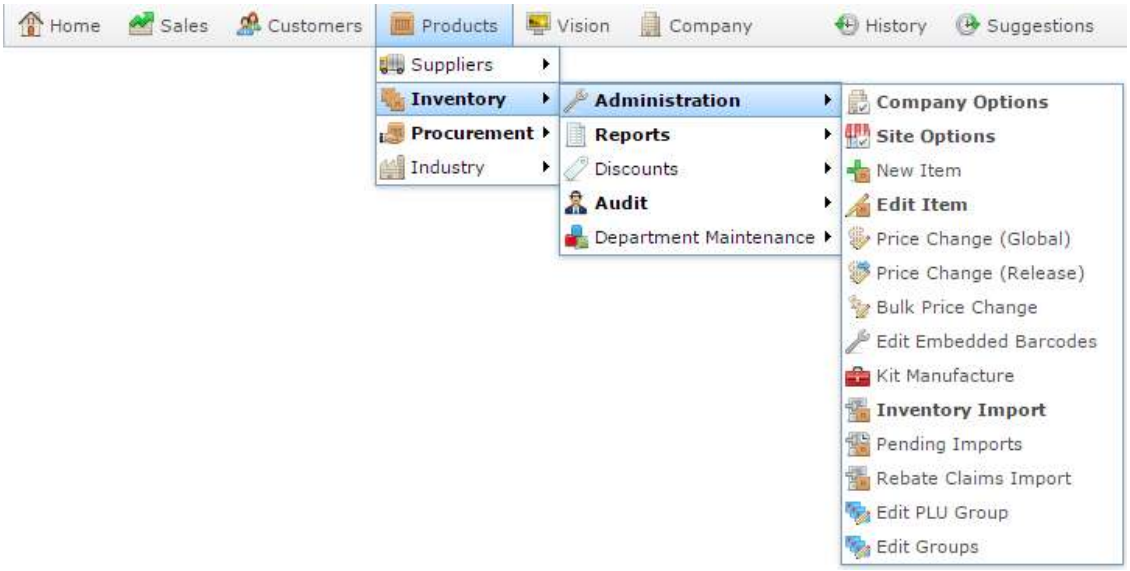
Inventory Management - Details tab

Use the Details tab of the Inventory Management screen to manage basic information about items in your inventory.

Opening the Details tab

To open the Details tab:

1. Press Products in the main menu bar.
2. Press **Inventory** > **Administration** > **Edit Item**.

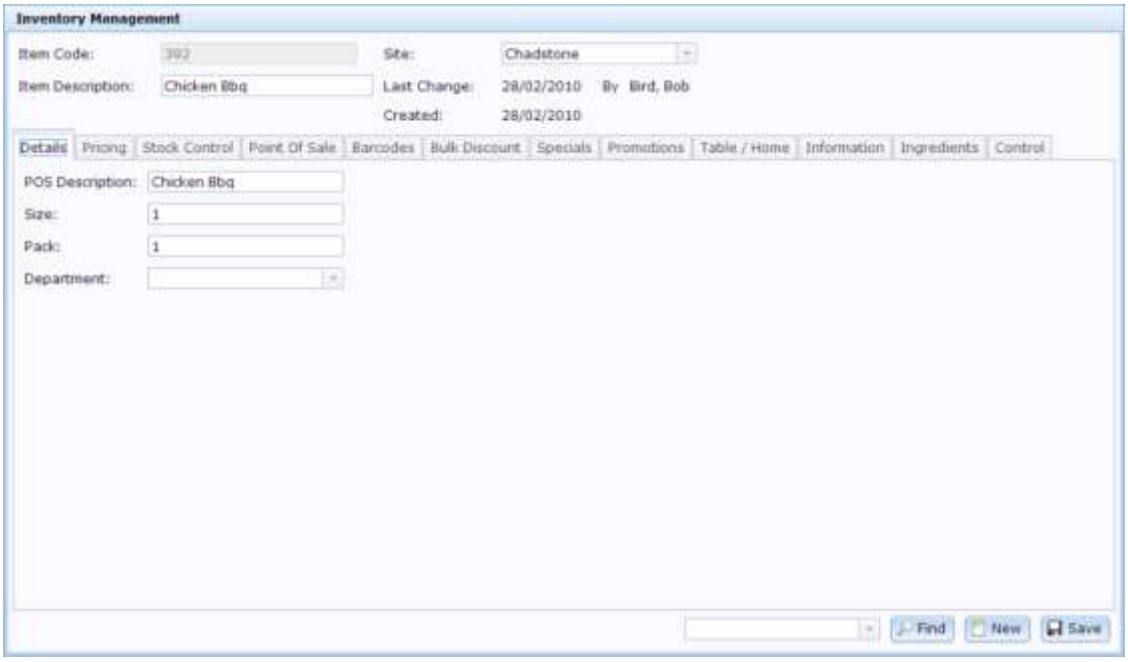


3. Search for the item you want to edit.

   See *Finding an item using the search screen* on page 50.

> **Note:** If you want to create a new item, see *Creating a new item* on page 47.

   The Details tab of the Inventory Management screen is displayed.

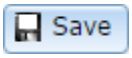


Inventory Management - Details tab key fields and buttons

Common fields and buttons

Some fields and buttons are common to all Inventory Maintenance screen tabs.

Field	Description
Item Code	Unique code identifying the item. For reporting integrity, this item code can never be used by another item.
Item Description	Description of the item used throughout the Portal. This description is not used on the Point of Sale. See *Inventory Management - Point of Sale tab* on page 88.
Site	The site selected for the current item configuration. Items can be configured on a per-site basis, offering different prices, availability or procurement management per site. See *Copying an item to another site* on page 58.

Field	Description
Last Change	Date this item was last changed, and the name of the Portal operator who changed it.
Created	Date the item was created.
	Switch the Inventory Maintenance screen to another item. See *Finding an item with a search field* on page 56.
	Create a new item. See *Creating a new item* on page 47.
	Save changes to the item.

Details tab key fields and buttons

Field	Description
POS Description	Description of the item for the Point of Sale.
Size	How units of items are measured and sold.
Pack	Number of items included in a single pack ordered from the supplier. You can configure the Portal to expand all orders to full packs. For example, if the supplier sends 5 units in a pack, and you want to order 3 units, the Portal can automatically expand that order to 5 so that the additional received units are expected. See the **Packs** field in *Configuring purchase orders for your company*. You can also configure the Portal to order and receive by packs. In this

Field	Description
	case, if there are 5 units in a pack, then ordering 3 in purchase orders actually orders 15 units. See *Configuring packs for your site*.
Department	Department the item belongs to.

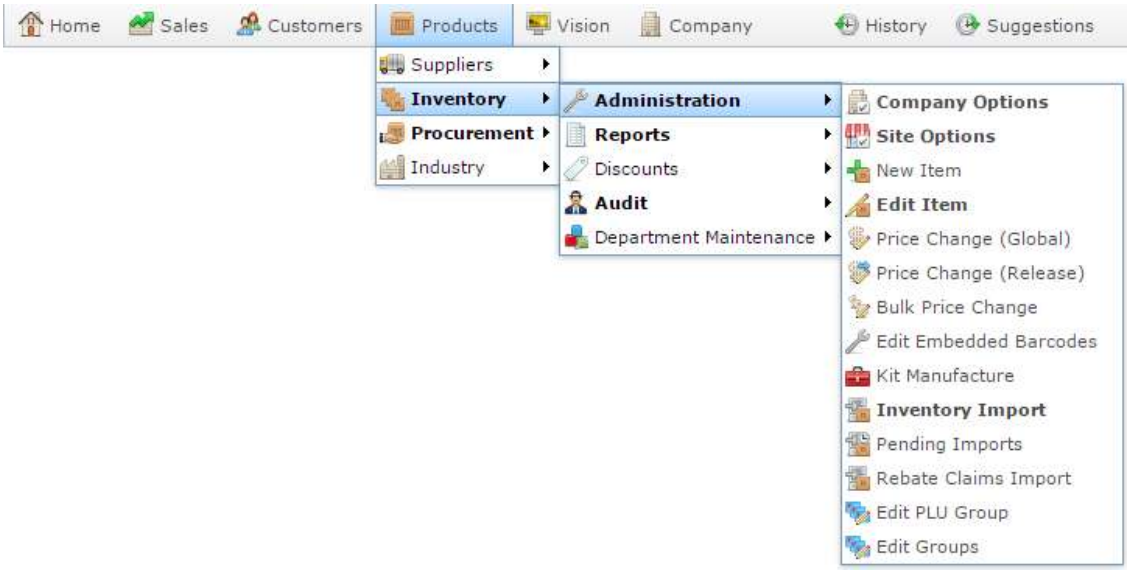
Inventory Management - Pricing tab

Use the Pricing tab of the Inventory Management screen to manage the cost and price of items in your inventory.

Opening the Pricing tab

To open the Pricing tab:

1. Press Products in the main menu bar.
2. Press **Inventory** > **Administration** > **Edit Item**.



3. Search for the item you want to edit.

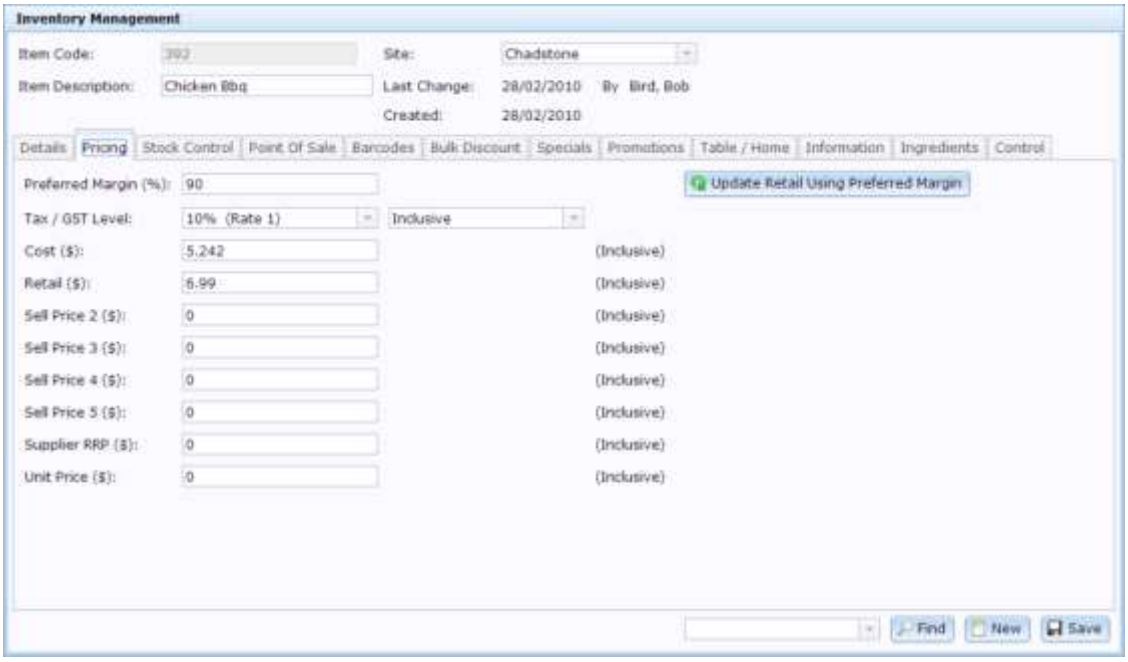
   See *Finding an item using the search screen* on page 50.

   > **Note:** If you want to create a new item, see *Creating a new item* on page 47.

   The Details tab of the Inventory Management screen is displayed.

4. Press the Pricing tab.

   The Pricing tab of the Inventory Management screen is displayed.

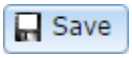


Inventory Management - Pricing tab key fields and buttons

Common fields and buttons

Some fields and buttons are common to all Inventory Maintenance screen tabs.

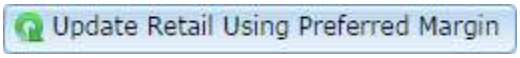
Field	Description
Item Code	Unique code identifying the item. For reporting integrity, this item code can never be used by another item.
Item Description	Description of the item used throughout the Portal. This description is not used on the Point of Sale. See *Inventory Management - Point of Sale tab* on page 88.
Site	The site selected for the current item configuration. Items can be configured on a per-site basis, offering different prices, availability or procurement management per site. See *Copying an item to another site* on page 58.

Field	Description
Last Change	Date this item was last changed, and the name of the Portal operator who changed it.
Created	Date the item was created.
	Switch the Inventory Maintenance screen to another item. See *Finding an item with a search field* on page 56.
	Create a new item. See *Creating a new item* on page 47.
	Save changes to the item.

Pricing tab key fields and buttons

Field	Description
Preferred Margin (%)	Type the percentage of the cost price you want to be added to create the retail price. For example, if an item costs $1.80, a preferred margin of 50% calculates the retail price by adding 50% of the item cost. 1.8 + (1.8 x .5) = $2.70. The Portal recalculates prices by preferred margin as Item Cost x (1 + (Preferred Margin / 100)). In the example above, that would be 1.8 x (1.5) = 2.7.
Tax / GST Level	The level of tax charged on the cost of this item.

Field	Description
Inclusive/Exclusive	Select whether the item's cost includes tax. If the item's cost does not include tax, then the Portal adds the taxed amount to the item's cost when calculating prices on preferred margins.
Cost ($)	The item's cost, calculated as either the last supplier cost used or the weighted average of all supplier costs for this item. See *Configuring costs for your site*. If you want to override the item cost, type the amount the item costs to supply.
Retail ($)	Type the standard retail price of the item.
Sell Price 2 ($)	Type the level 2 price of the item.
Sell Price 3 ($)	Type the level 3 price of the item.
Sell Price 4 ($)	Type the level 4 price of the item.
Sell Price 5 ($)	Type the level 5 price of the item.
Supplier RRP ($)	Type the recommended retail price of the item according to the supplier.
Unit Price ($)	Type the price per measured unit, for example per kilogram.
RRP GP Margin	The gross profit margin if the item is sold at its recommended retail price.

Field	Description
	Note: This field is only displayed if the Show Margins Company configuration is set. See *Configuring inventory options for your company*.
RRP GP Markup	The gross markup from the item's cost to its recommended retail price. **Note:** This field is only displayed if the Show Margins Company configuration is set. See *Configuring inventory options for your company*.
Gross Profit (Ex)	The gross profit earned when this item is sold at its recommended retail price. **Note:** This field is only displayed if the Show Margins Company configuration is set. See *Configuring inventory options for your company*.
	Press to recalculate the Retail price to ensure it provides the Preferred Margin over the Cost.

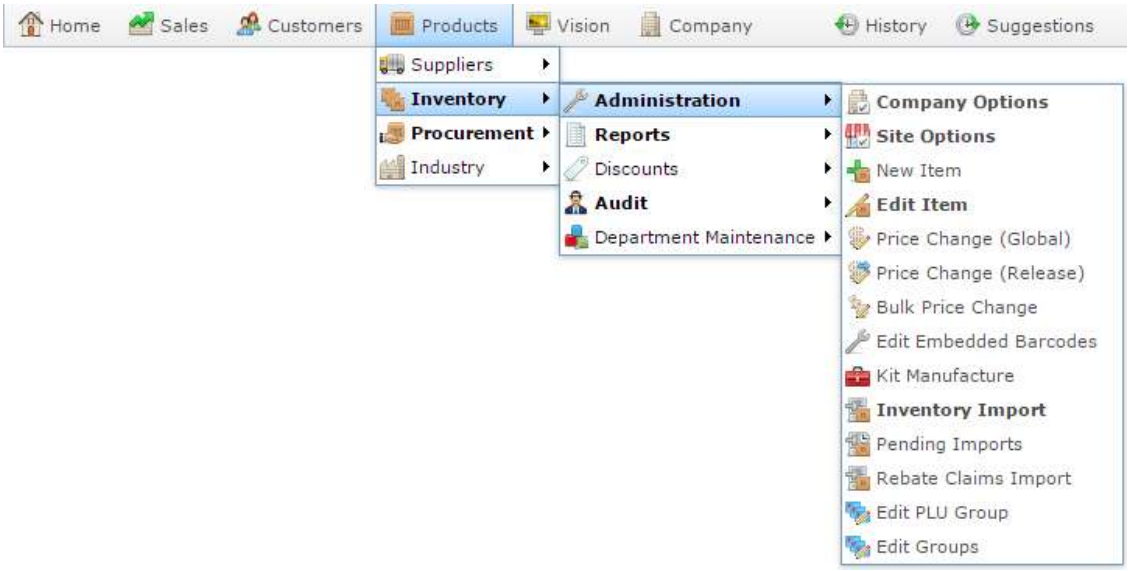
Inventory Management - Stock Control tab

Use the Stock Control tab of the Inventory Management screen to manage the replenishment and supply of items in your inventory

Opening the Stock Control tab

To open the Stock Control tab:

1. Press Products in the main menu bar.
2. Press **Inventory** > **Administration** > **Edit Item**.



3. Search for the item you want to edit.

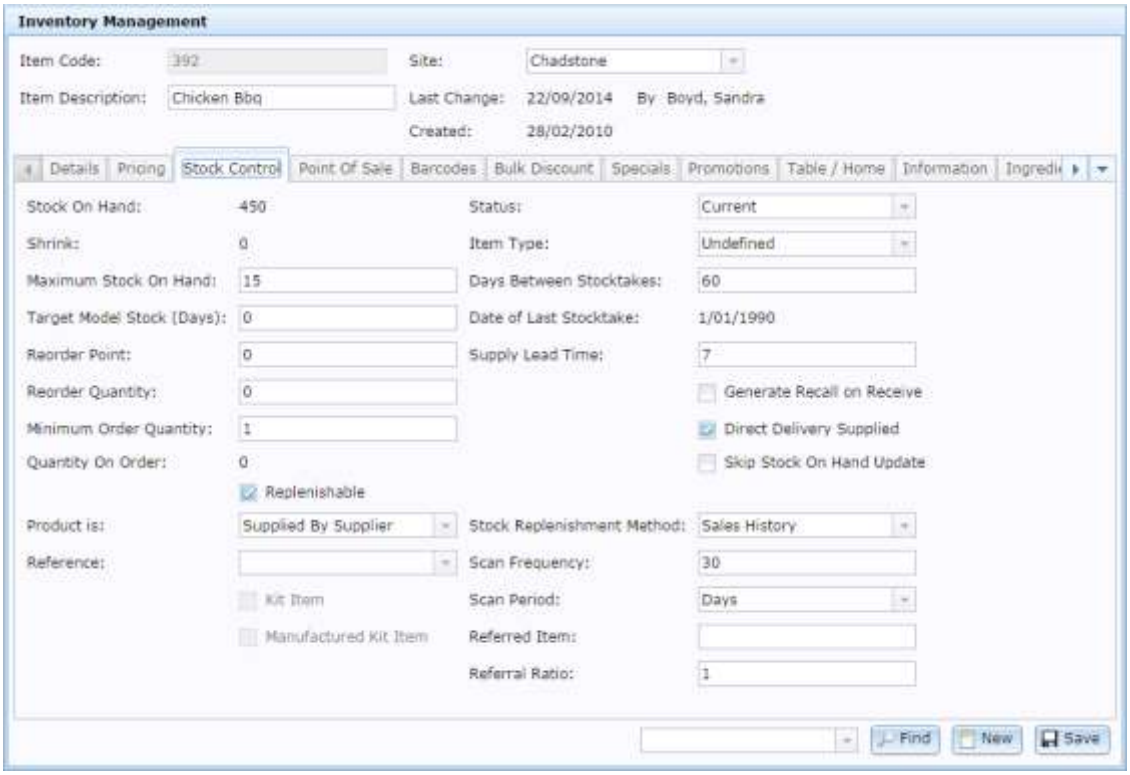
   See *Finding an item using the search screen* on page 50.

   > **Note:** If you want to create a new item, see *Creating a new item* on page 47.

   The Details tab of the Inventory Management screen is displayed.

4. Press the Stock Control tab.

   The Stock Control tab of the Inventory Management screen is displayed.

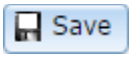


Inventory Management - Stock Control tab key fields and buttons

Common fields and buttons

Some fields and buttons are common to all Inventory Maintenance screen tabs.

Field	Description
Item Code	Unique code identifying the item. For reporting integrity, this item code can never be used by another item.
Item Description	Description of the item used throughout the Portal. This description is not used on the Point of Sale. See *Inventory Management - Point of Sale tab* on page 88.
Site	The site selected for the current item configuration. Items can be configured on a per-site basis, offering different prices, availability or procurement management per site.

Field	Description
	See *Copying an item to another site* on page 58.
Last Change	Date this item was last changed, and the name of the Portal operator who changed it.
Created	Date the item was created.
	Switch the Inventory Maintenance screen to another item. See *Finding an item with a search field* on page 56.
	Create a new item. See *Creating a new item* on page 47.
	Save changes to the item.

Stock Control tab key fields and buttons

Field	Description
Stock on Hand	The amount or units of this item currently in stock, automatically calculated by the Portal.
Shrink	The amount or units of this item lost due to shrinkage, automatically calculated by the Portal after each stock take is finalised.
Maximum Stock On Hand	Type the maximum amount or units of this item you want to have in stock at a time. This is used by the Portal's Maximum automatic procurement function.

Field	Description
Target Model Stock (Days)	The number of days' worth of item units you want to keep in stock. For example, enough stock to cover three days. This is used by the Portal's Dynamic automatic procurement function.
Reorder Point	Type the level of stock that you want to trigger automatic reordering. This is used by the Portal's Minimum automatic procurement function.
Reorder Quantity	Type the quantity you want to automatically reorder when procurement is triggered by the reorder point.
Minimum Order Quantity	Type the minimum quantity of this item you want per order.
Quantity On Order	The amount or units of this item currently on order, automatically calculated by the Portal.
Replenishable	Select if this stock can be re-ordered from the supplier.
Product is	Select whether the item is: **Supplied by Supplier** — Ordered from and supplied by a supplier. **Owned By Debtor** — Sold on consignment from a debtor.
Reference	Select the primary supplier of this item.
Kit Item	Selected if this item is a kit. **Note:** This field is not editable. See *Managing referrals and kits* on page 8.

Field	Description
Manufactured Kit Item	Selected if this item is a manufactured kit. **Note:** This field is not editable. See *Managing referrals and kits* on page 8.
Status	Select the status of the item: **Current** — Can be sold and refunded as normal, and ordered from suppliers. **Discontinued** — Can be sold and refunded as normal, but can no longer be ordered from a supplier. **Purged** — Can be sold and refunded as normal, but should not be ordered from a supplier. **Note:** Use the Purged status to avoid confusion if an item is still available from a supplier, but you no longer want to order it.
Item type	Select the item type.
Days Between Stocktakes	Select the number of days between stock takes of this item. For example, to perform a stock take every six months, type **182**.
Date of Last Stocktake	Date of the last stock take involving this item, as recorded by the Portal.
Supply Lead Time	Average number of days between ordering this item from the supplier and receiving it.
Generator Recall on Receive	Select to recall existing stock when new stock is received. For example, to replenish a bakery with fresh bread, or replace last month's magazine with the new issue.

Field	Description
Direct Delivery Supplied	Select if this item can be supplied directly from a debtor, rather than via the warehouse.
Skip Stock On Hand Update	Select to not update the stock-on-hand. For example, if the item represents something not held in stock, such as service hours. See *Creating an item that does not track stock* on page 60.
Stock Replenishment Method	Select whether the Portal arranges stock replenishment by: **Manual** — Select to manually replenish stock. **Fixed (Maximum) Level** — Select to automatically keep the stock at the maximum stock-on-hand level. **Fixed (Minimum) Level** — Select to automatically keep the stock above the minimum stock-on-hand level. **Dynamic Reorder Level** — Select to automatically calculate stock replenishment to meet Target Model Stock levels, using sales information. **Sales History** — Select to replenish stock on a sell-one-order-one basis. **Movement Forecast** — Select to replenish stock based on a forecast formula that you provide to AMC Convergent IT. **Note:** If you are using an automatic stock replenishment method, you can still create manual orders of stock with suppliers.
Scan Frequency	Select the number of scan periods the Portal should wait before checking stock levels for replenishment. For example, to scan stock levels every fortnight, select a Scan Frequency of **2** and a Scan Period of **Weeks**.

Field	Description
Scan Period	Select whether the scan frequency is calculated in days, weeks or months.
Referred Item	The item number of this item's referred item. For example, if this item is a can of drink from a case of cans, this field contains the item number of the case. **Note:** If an item has a referral, its sales are tracked but the stock-on-hand of the referred item is updated instead. See *Managing referrals and kits* on page 8.
Referral Ratio	The number of this item that make up the referred item. For example, if there are 24 cans of drink in the case, the ratio is **24**.

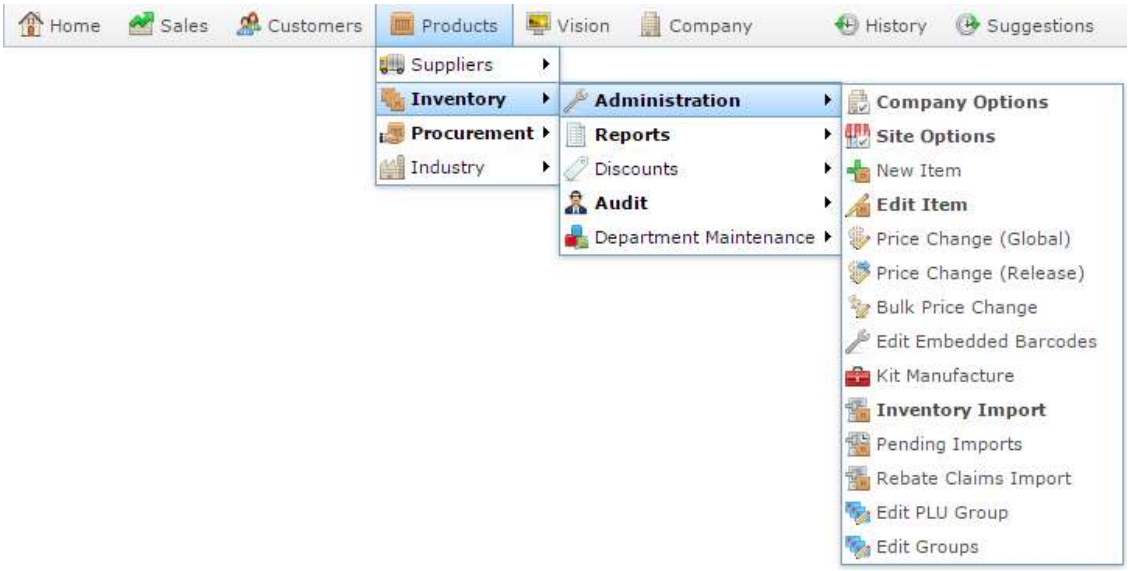
Inventory Management - Point of Sale tab

Use the Point of Sale tab of the Inventory Management screen to manage how the item is handled by the Point of Sale.

Opening the Point of Sale tab

To open the Point of Sale tab:

1. Press Products in the main menu bar.
2. Press **Inventory** > **Administration** > **Edit Item**.



3. Search for the item you want to edit.

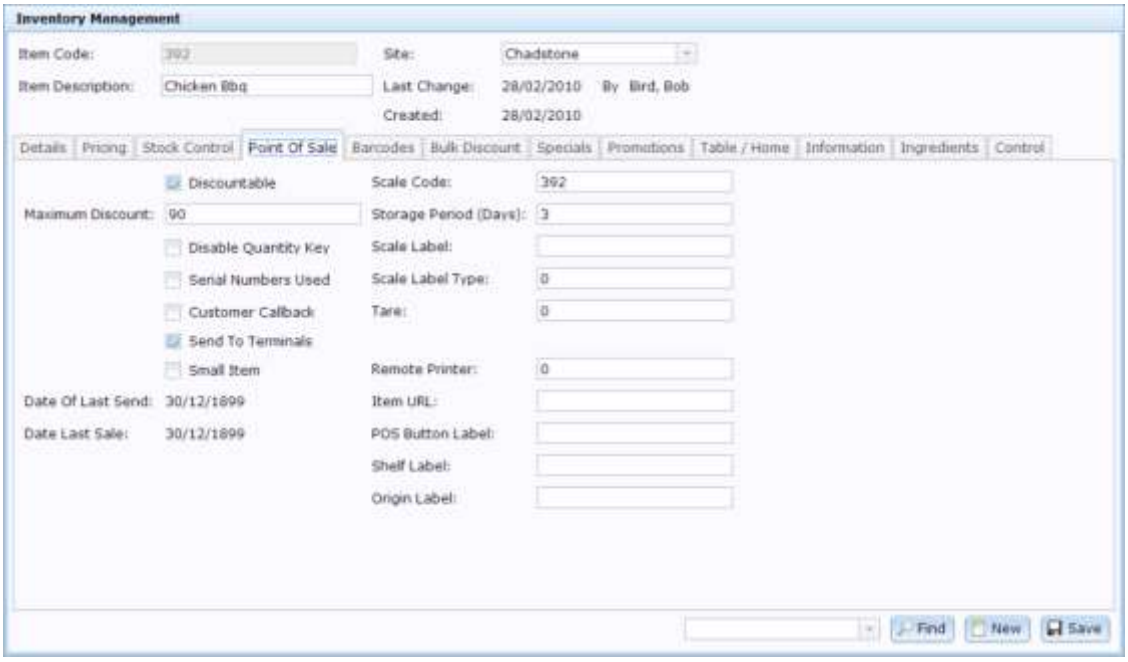
   See *Finding an item using the search screen* on page 50.

   > **Note:** If you want to create a new item, see *Creating a new item* on page 47.

   The Details tab of the Inventory Management screen is displayed.

4. Press the Point of Sale tab.

   The Point of Sale tab of the Inventory Management screen is displayed.

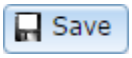


Inventory Management - Point of Sale tab key fields and buttons

Common fields and buttons

Some fields and buttons are common to all Inventory Maintenance screen tabs.

Field	Description
Item Code	Unique code identifying the item. For reporting integrity, this item code can never be used by another item.
Item Description	Description of the item used throughout the Portal. This description is not used on the Point of Sale. See *Inventory Management - Point of Sale tab* on page 88.
Site	The site selected for the current item configuration. Items can be configured on a per-site basis, offering different prices, availability or procurement management per site. See *Copying an item to another site* on page 58.

Field	Description
Last Change	Date this item was last changed, and the name of the Portal operator who changed it.
Created	Date the item was created.
	Switch the Inventory Maintenance screen to another item. See *Finding an item with a search field* on page 56.
	Create a new item. See *Creating a new item* on page 47.
	Save changes to the item.

Point of Sale tab key fields and buttons

Field	Description
Discountable	Select to allow discounts on this item.
Maximum Discount	Type the maximum allowed discount as a percentage. For example, if the item must not be discounted to less than half price, type **50**. **Note:** This has no effect on price overrides, specials, promotions or bulk discounts.
Disable Quantity Key	Select to disable the quantity key in the point of sale. **Note:** The quantity key is automatically disabled for items sold by weight.

Field	Description
Serial Numbers Used	Select if the item's serial number should be recorded when the item is sold.
Customer Callback	Select to include on the receipt a phone number or website address inviting customer feedback about your product,
Send To Terminals	Select to allow this item to appear on the Point of Sale. **Note:** If this field is not selected, the item cannot be sold via the Point of Sale.
Small Item	Select if this item is too small to fit a barcode. This field is used for to generate a report to help create Point of Sale one-shot buttons to represent this item on the POS.
Date Of Last Send	Date the Point of Sale was last updated.
Date Last Sale	Date the item was last sold at the Point of Sale.
Scale Code	The item code to use with the scale. **Note:** A scale code of **0** disables the use of the scale for this item; quantities are measured in units rather than by weight.
Storage Period (Days)	Type the maximum number of days the item should be stored. This number is added to the current date when printing labels with Best By or Use By.
Scale Label	Type the label to use when printing labels for scale wrappers.

Field	Description
Scale Label Type	Type the code for the label type required for this item. This code is passed to the wrapping system. **Note:** Consult the instructions of your wrapping system for the appropriate code.
Tare	Type the weight of the packaging used for the item. This weight is deducted from the scale total to find the nett weight of the item at the Point of Sale.
Remote Printer	Type the code of the printer that receipts containing this item are sent to. For example, items that must be prepared in the kitchen are sent to the kitchen receipt printer.
Item URL	Type the URL of a page relating to the item.
POS Button Label	Type the label to display on the Point of Sale button for this item. **Note:** This field is no longer in use with the iZen Point of Sale. Please see the iZen User Guide for more details.
Shelf Label	Type the shelf label for this item.
Origin Label	Type the county of origin information to be included in labels and wrappers.

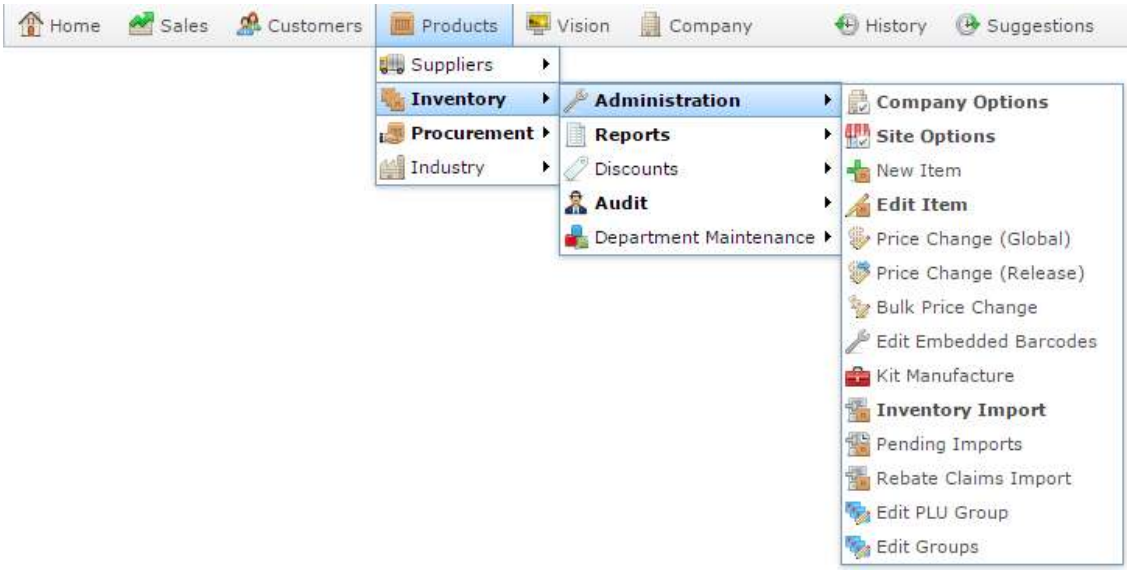
Inventory Management - Barcodes tab

Use the Barcodes tab of the Inventory Management screen to manage barcodes related to this item.

Opening the Barcodes tab

To open the Barcodes tab:

1. Press Products in the main menu bar.
2. Press **Inventory** > **Administration** > **Edit Item**.



3. Search for the item you want to edit.

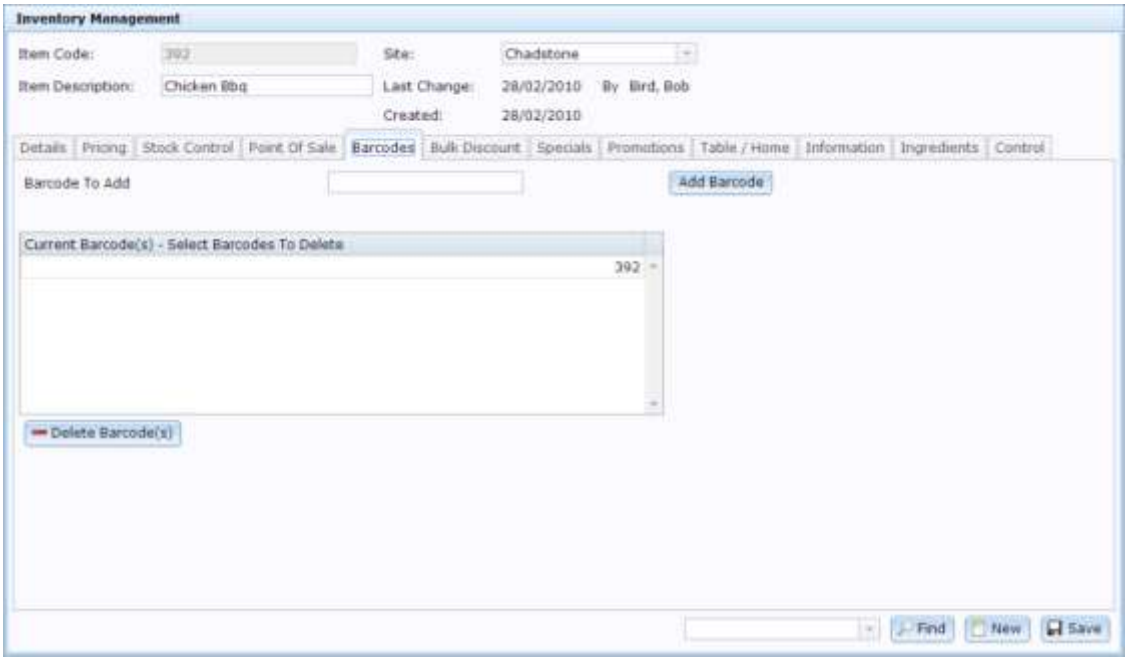
   See *Finding an item using the search screen* on page 50.

   > **Note:** If you want to create a new item, see *Creating a new item* on page 47.

   The Details tab of the Inventory Management screen is displayed.

4. Press the Barcodes tab.

   The Barcodes tab of the Inventory Management screen is displayed.

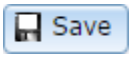


Inventory Management - Barcodes tab key fields and buttons

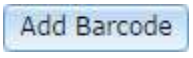
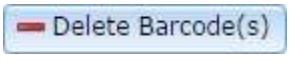
Common fields and buttons

Some fields and buttons are common to all Inventory Maintenance screen tabs.

Field	Description
Item Code	Unique code identifying the item. For reporting integrity, this item code can never be used by another item.
Item Description	Description of the item used throughout the Portal. This description is not used on the Point of Sale. See *Inventory Management - Point of Sale tab* on page 88.
Site	The site selected for the current item configuration. Items can be configured on a per-site basis, offering different prices, availability or procurement management per site. See *Copying an item to another site* on page 58.

Field	Description
Last Change	Date this item was last changed, and the name of the Portal operator who changed it.
Created	Date the item was created.
	Switch the Inventory Maintenance screen to another item. See *Finding an item with a search field* on page 56.
	Create a new item. See *Creating a new item* on page 47.
	Save changes to the item.

Barcodes tab key fields and buttons

Field	Description
Barcode To Add	Type a barcode to add it to this item.
	Add the selected barcode to the item.
Current Barcode(s)	Barcodes that are assigned to this item.
	Delete the selected barcodes from the item.

Inventory Management - Bulk Discount tab

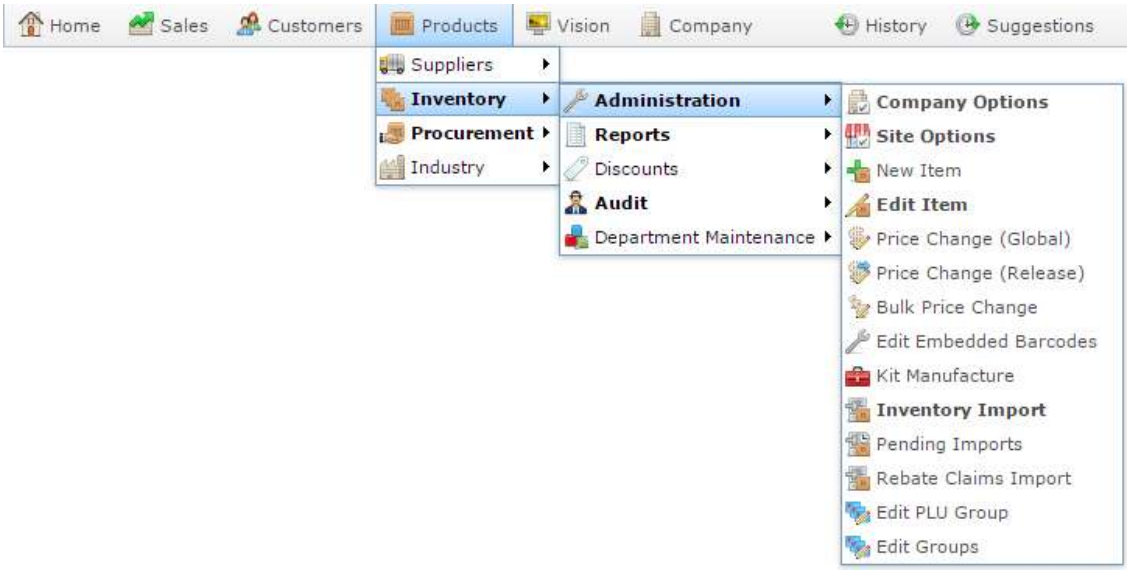
Use the Bulk Discount tab of the Inventory Management screen to manage discounts for bulk purchases of an item.

See *Managing bulk discounts*.

Opening the Bulk Discount tab

To open the Bulk Discount tab:

1. Press Products in the main menu bar.
2. Press **Inventory** > **Administration** > **Edit Item**.



3. Search for the item you want to edit.

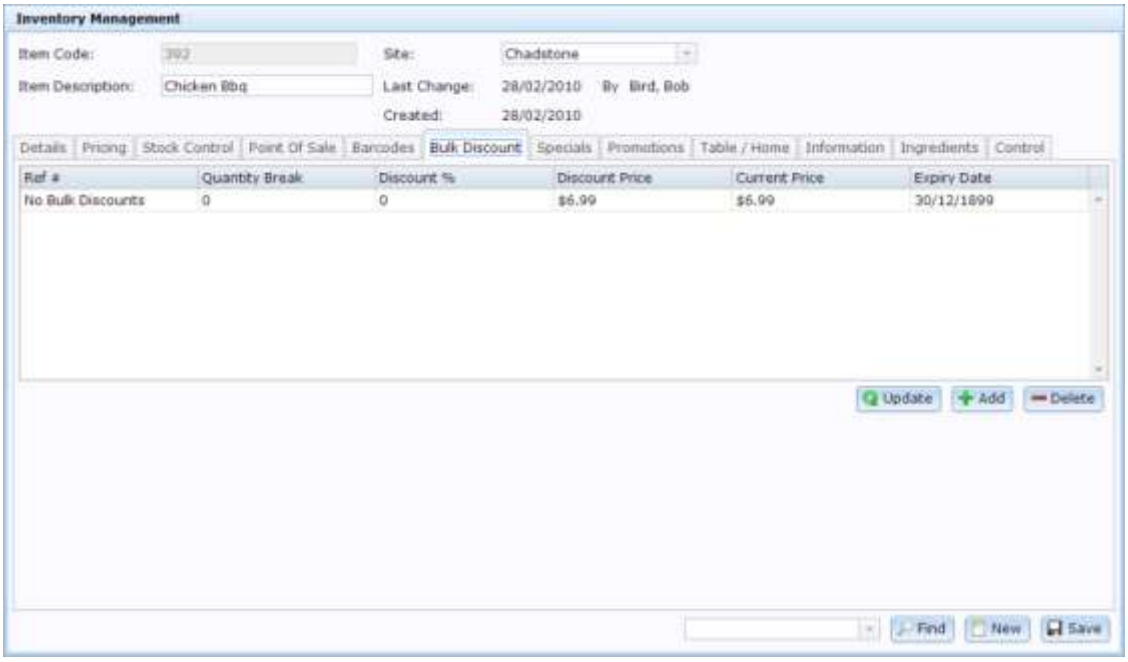
   See *Finding an item using the search screen* on page 50.

   Note: If you want to create a new item, see *Creating a new item* on page 47.

   The Details tab of the Inventory Management screen is displayed.

4. Press the Bulk Discount tab.

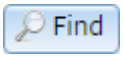
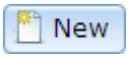
   The Bulk Discount tab of the Inventory Management screen is displayed.


Inventory Management
Item Code:
Item Description:
Chicken Bbq
Site:
Chadstone
Last Change:
28/02/2010
By Bird, Bob
Created:
28/02/2010
Details
Pricing
Stock Control
Point Of Sale
Barcodes
Bulk Discount
Specials
Promotions
Table / Home
Information
Ingredients
Control
Ref #
Quantity Break
Discount %
Discount Price
Current Price
Expiry Date
No Bulk Discounts
0
0
$6.99
$6.99
30/12/1899
Update
Add
Delete
Find
New
Save

Inventory Management - Bulk Discount tab key fields and buttons

Common fields and buttons

Some fields and buttons are common to all Inventory Maintenance screen tabs.

Field	Description
Item Code	Unique code identifying the item. For reporting integrity, this item code can never be used by another item.
Item Description	Description of the item used throughout the Portal. This description is not used on the Point of Sale. See *Inventory Management - Point of Sale tab* on page 88.
Site	The site selected for the current item configuration. Items can be configured on a per-site basis, offering different prices, availability or procurement management per site. See *Copying an item to another site* on page 58.
Last Change	Date this item was last changed, and the name of the Portal operator who changed it.
Created	Date the item was created.
	Switch the Inventory Maintenance screen to another item. See *Finding an item with a search field* on page 56.
	Create a new item. See *Creating a new item* on page 47.

Field	Description
Save	Save changes to the item.

Bulk Discount tab key fields and buttons

Field	Description
Ref #	A reference for the discount used by the Portal.
Quantity Break	The purchase quantity at which this discount activates. **Note:** Only the highest applicable quantity discount is applied per purchase. For example, if you have one discount with a quantity break of 10 and another discount with a quantity break of 25, then purchasing 12 units of the item activates the 10-item discount, but not the 25-item discount. Purchasing 30 units of the item activates the 25-item discount, but not the 10-item discount.
Discount %	The percentage that is discounted off the item unit price. For example, a 25% discount is **25**. This column is automatically calculated by the Portal and cannot be edited.
Discount Price	Type the discounted price of the item per unit at this quantity.
Current Price	The current retail-level price of the item.
Expiry Date	The date this bulk discount is active until.

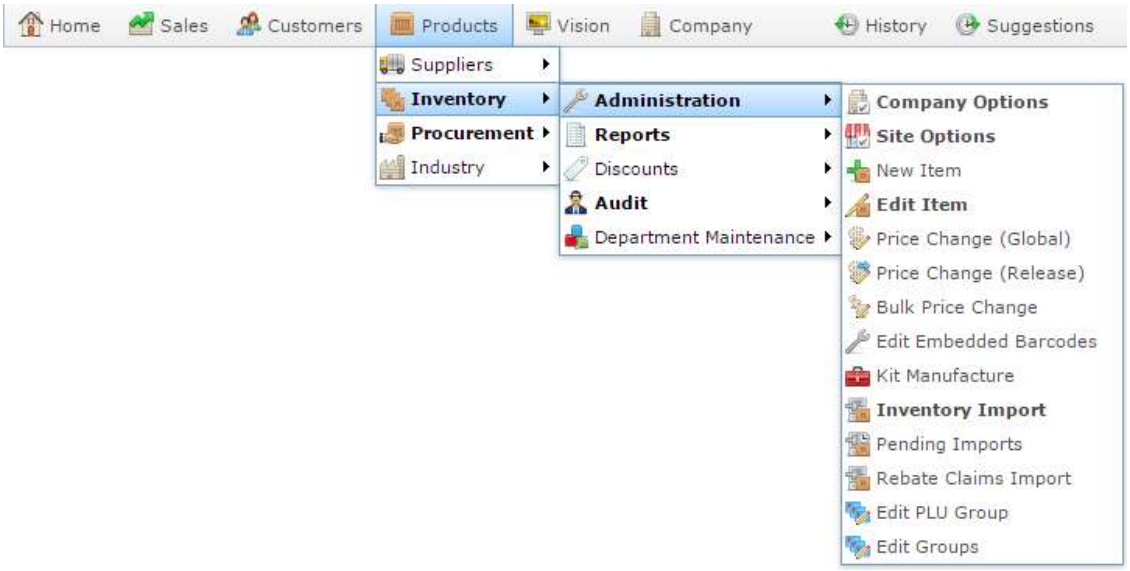
Inventory Management - Specials tab

Use the Specials tab of the Inventory Management screen to manage item specials.

Opening the Specials tab

To open the Specials tab:

1. Press Products in the main menu bar.
2. Press **Inventory** > **Administration** > **Edit Item**.



3. Search for the item you want to edit.

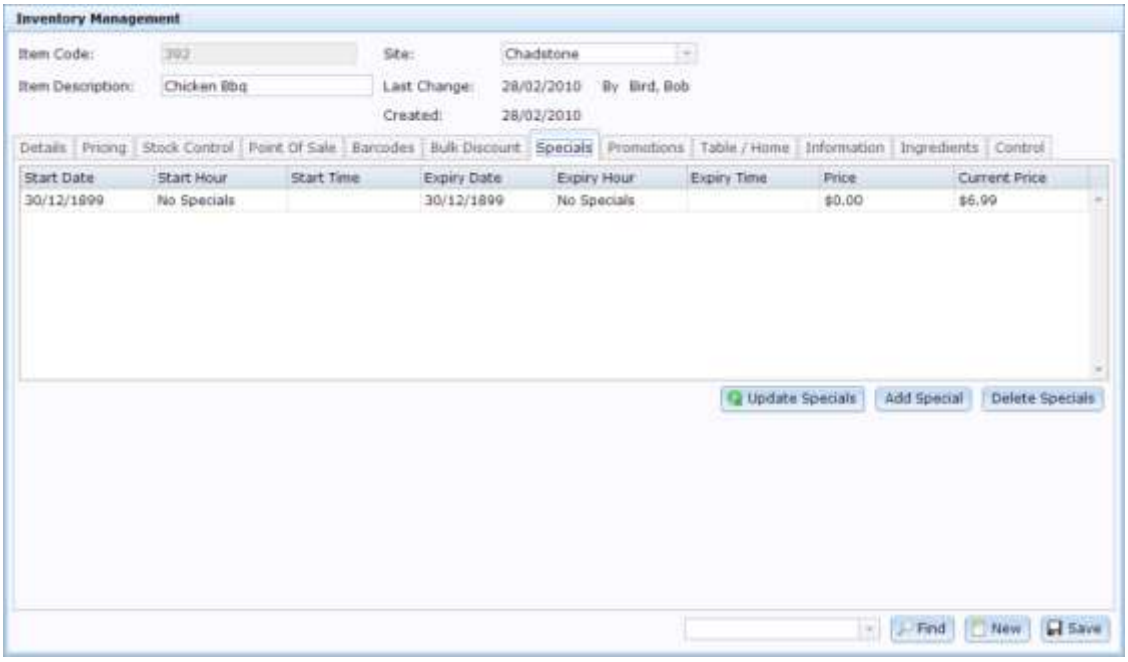
   See *Finding an item using the search screen* on page 50.

   Note: If you want to create a new item, see *Creating a new item* on page 47.

   The Details tab of the Inventory Management screen is displayed.

4. Press the Specials tab.

   The Specials tab of the Inventory Management screen is displayed.

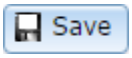


Inventory Management - Specials tab key fields and buttons

Common fields and buttons

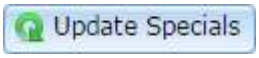
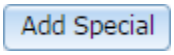
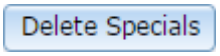
Some fields and buttons are common to all Inventory Maintenance screen tabs.

Field	Description
Item Code	Unique code identifying the item. For reporting integrity, this item code can never be used by another item.
Item Description	Description of the item used throughout the Portal. This description is not used on the Point of Sale. See *Inventory Management - Point of Sale tab* on page 88.
Site	The site selected for the current item configuration. Items can be configured on a per-site basis, offering different prices, availability or procurement management per site. See *Copying an item to another site* on page 58.

Field	Description
Last Change	Date this item was last changed, and the name of the Portal operator who changed it.
Created	Date the item was created.
	Switch the Inventory Maintenance screen to another item. See *Finding an item with a search field* on page 56.
	Create a new item. See *Creating a new item* on page 47.
	Save changes to the item.

Specials tab key fields and buttons

Field	Description
Start Date	The date the special starts.
Start Hour	The time of day the special starts.
Start Time	The hour, time and second the special starts, in twenty-four hour time. **Note:** This field is automatically calculated by the Portal and is not editable.
Expiry Date	The date the special stops running.

Field	Description
Expiry Hour	The time of day the special stops running.
Expiry Time	The hour, time and second the special ends, in twenty-four hour time. **Note:** This field is automatically calculated by the Portal and is not editable.
Price	The special price to use for the duration of the special. **Note:** This price applies to the retail price level only.
Current Price	The current retail price of the item.
	Save any changes made to your specials. See *Creating a price special*.
	Create a new special. See *Creating a price special*.
	Delete the selected special. See *Creating a price special*.

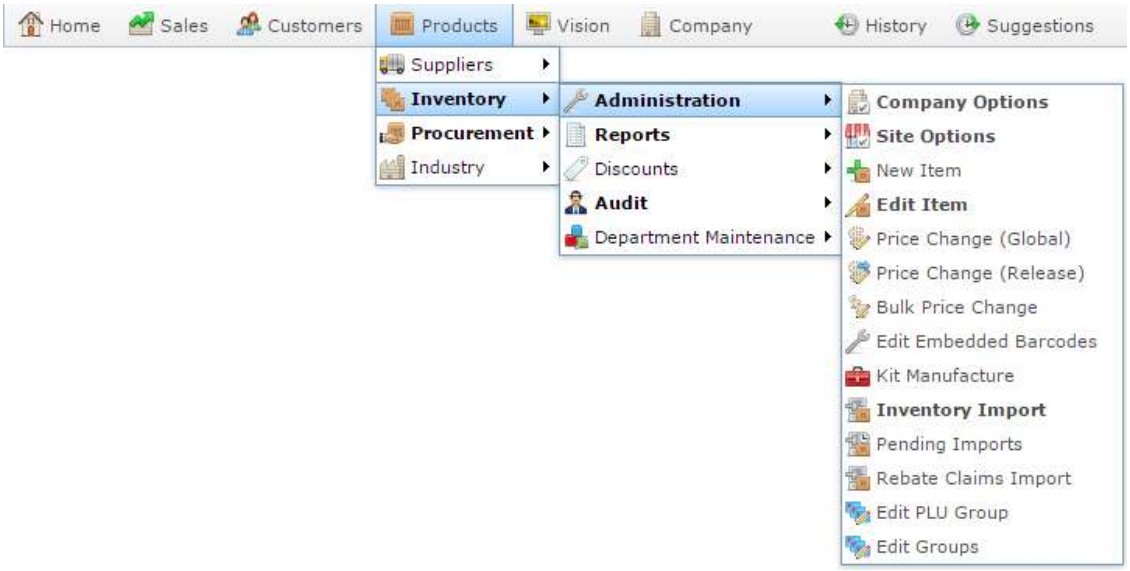
Inventory Management - Promotions tab

Use the Promotions tab of the Inventory Management screen to manage item promotions.

Opening the Promotions tab

To open the Promotions tab:

1. Press Products in the main menu bar.
2. Press **Inventory** > **Administration** > **Edit Item**.



3. Search for the item you want to edit.

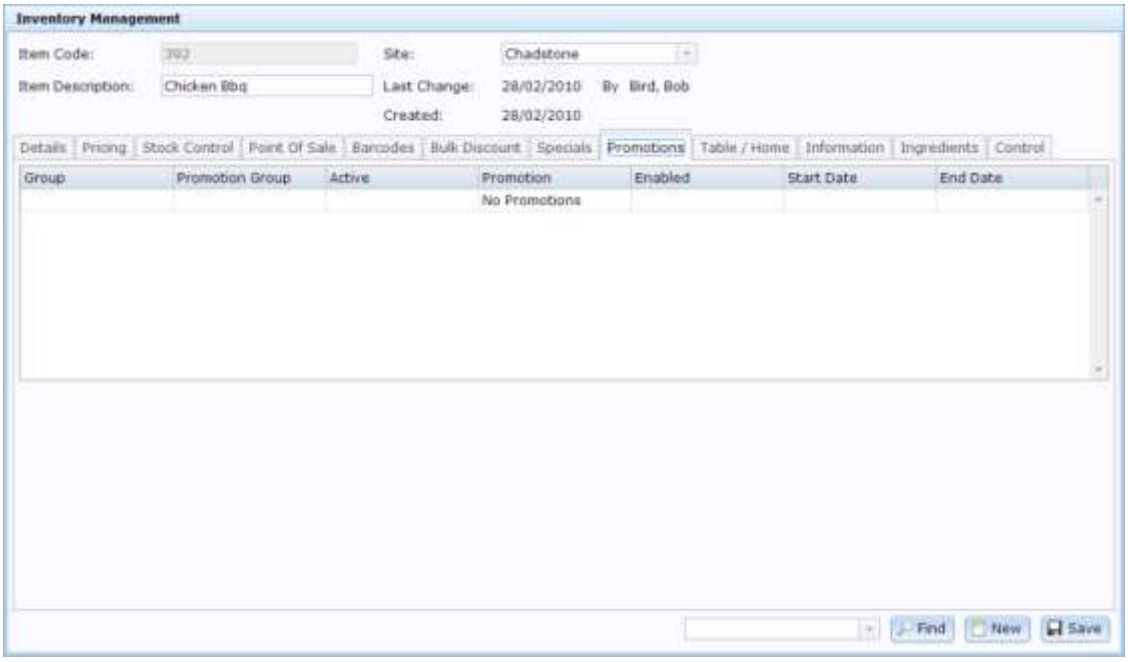
   See *Finding an item using the search screen* on page 50.

   Note: If you want to create a new item, see *Creating a new item* on page 47.

   The Details tab of the Inventory Management screen is displayed.

4. Press the Promotions tab.

   The Promotions tab of the Inventory Management screen is displayed.

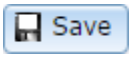


Inventory Management - Promotions tab key fields and buttons

Common fields and buttons

Some fields and buttons are common to all Inventory Maintenance screen tabs.

Field	Description
Item Code	Unique code identifying the item. For reporting integrity, this item code can never be used by another item.
Item Description	Description of the item used throughout the Portal. This description is not used on the Point of Sale. See *Inventory Management - Point of Sale tab* on page 88.
Site	The site selected for the current item configuration. Items can be configured on a per-site basis, offering different prices, availability or procurement management per site. See *Copying an item to another site* on page 58.

Field	Description
Last Change	Date this item was last changed, and the name of the Portal operator who changed it.
Created	Date the item was created.
	Switch the Inventory Maintenance screen to another item. See *Finding an item with a search field* on page 56.
	Create a new item. See *Creating a new item* on page 47.
	Save changes to the item.

Promotions tab key fields and buttons

Field	Description
Group	The group number of the promotion group.
Promotion Group	The promotion group that the promotion belongs to for the listed promotion.
Active	Whether the promotion is currently operating.
Promotion	The name of the promotion.
Enabled	Indicates whether the promotion can operate. **Note:** A promotion only operates if it is enabled, even if you are

Field	Description
	within the start and end date.
Start Date	The date the promotion is scheduled to start.
End Date	The date the promotion is scheduled to end.

Inventory Management - Table / Home tab

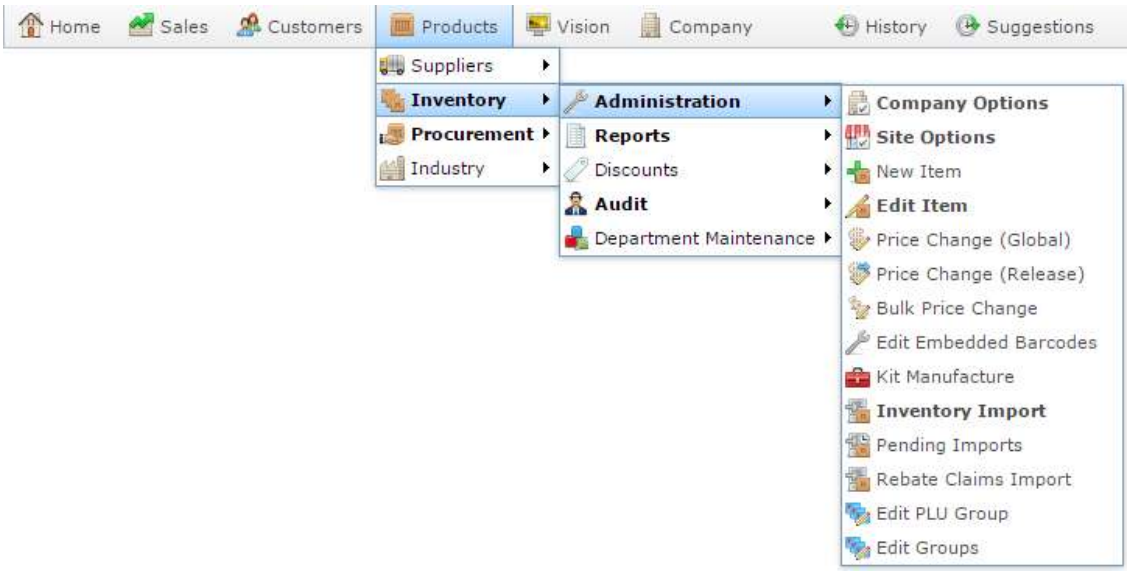
Use the Table / Home tab of the Inventory Management screen to manage the table and home shopping options of an item, including:

- the table menu an item is included in
- additional options the item has
- the preparation time of the item
- the style of Home Shopping.

Opening the Table / Home tab

To open the Table / Home tab:

1. Press Products in the main menu bar.
2. Press **Inventory** > **Administration** > **Edit Item**.



3. Search for the item you want to edit.

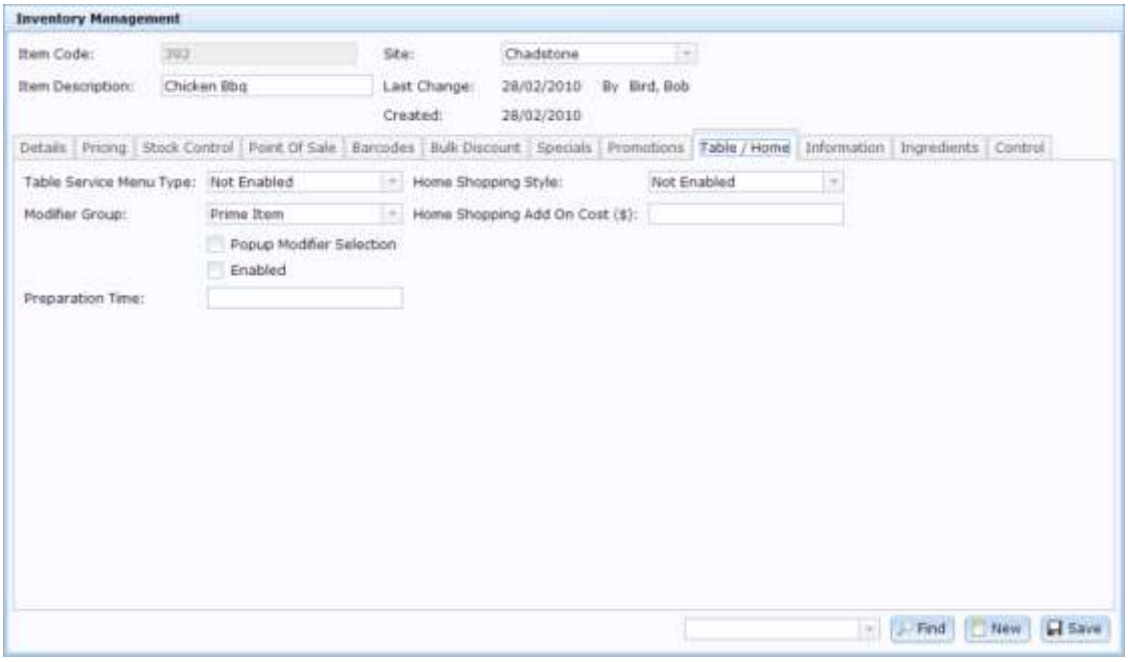
   See *Finding an item using the search screen* on page 50.

   > **Note:** If you want to create a new item, see *Creating a new item* on page 47.

   The Details tab of the Inventory Management screen is displayed.

4. Press the Table / Home tab.

   The Table / Home tab of the Inventory Management screen is displayed.



Inventory Management - Table / Home tab key fields and buttons

Common fields and buttons

Some fields and buttons are common to all Inventory Maintenance screen tabs.

Field	Description
Item Code	Unique code identifying the item. For reporting integrity, this item code can never be used by another item.
Item Description	Description of the item used throughout the Portal. This description is not used on the Point of Sale. See *Inventory Management - Point of Sale tab* on page 88.
Site	The site selected for the current item configuration. Items can be configured on a per-site basis, offering different prices, availability or procurement management per site. See *Copying an item to another site* on page 58.

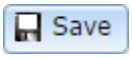
Field	Description
Last Change	Date this item was last changed, and the name of the Portal operator who changed it.
Created	Date the item was created.
	Switch the Inventory Maintenance screen to another item. See *Finding an item with a search field* on page 56.
	Create a new item. See *Creating a new item* on page 47.
	Save changes to the item.

Table / Home tab key fields and buttons

Field	Description
Table Service Menu Type	Select which table service menu the item is included in, or **Not Enabled** to remove this item from all menus. **Note:** Items can only belong to one menu.
Modifier Group	Select which modifier group the item belongs to, or Prime Item if the item is available in its own right. For example, items that add extra sugar or soy milk to a drink might belong to the same modifier group, but the drink items themselves are prime items.
Popup Modifier	Select to enable the item modification popup on the Point of Sale.

Field	Description
Selection	
Enabled	Select to allow this item to be served at tables.
Preparation Time	Type the number of minutes the item usually takes to prepare.
Home Shopping Style	Select the type of home shopping available for this item: **Not Enabled** — No home shopping is available for this item. **Normal** — This item is available via internet, phone and mail order. **Internet Only** — This item is only available via online shopping. **Phone Only** — This item is only available via phone order. **Mail Order** — This item is only available via mail order.
Home Shopping Add On Cost ($)	Type the additional fee added to this item for home shopping.

Inventory Management - Information tab

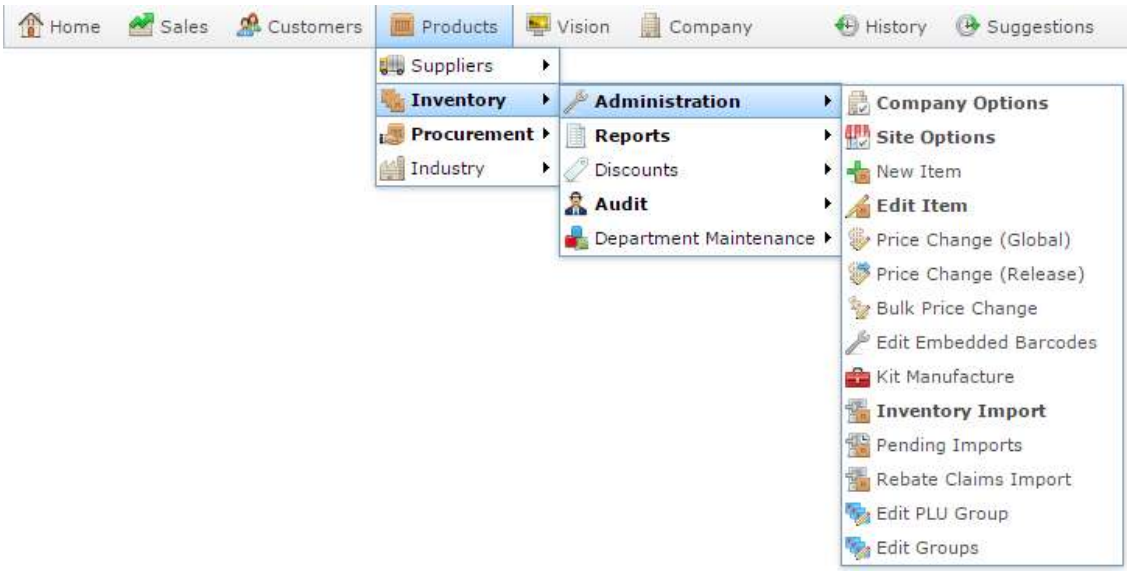
Use the Information tab of the Inventory Management screen to manage:

- brand, fashion and style information
- size and pattern information
- additional information such as height and weight.

Opening the Information tab

To open the Information tab:

1. Press Products in the main menu bar.
2. Press **Inventory** > **Administration** > **Edit Item**.



3. Search for the item you want to edit.

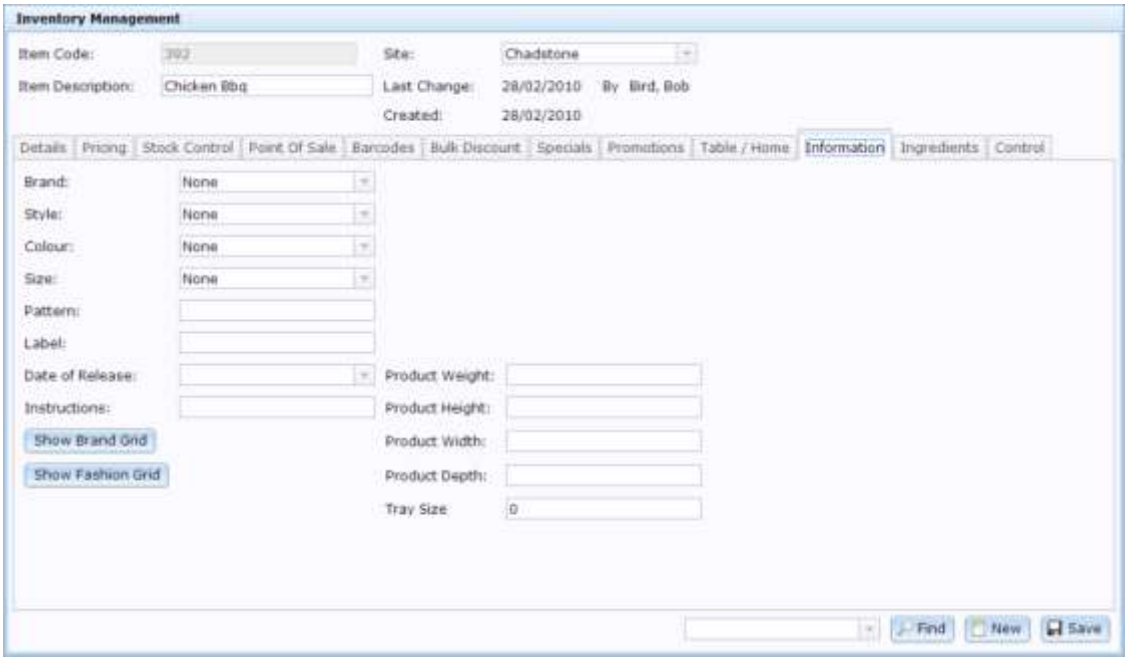
   See *Finding an item using the search screen* on page 50.

   Note: If you want to create a new item, see *Creating a new item* on page 47.

   The Details tab of the Inventory Management screen is displayed.

4. Press the Information tab.

   The Information tab of the Inventory Management screen is displayed.

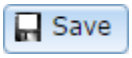


Inventory Management - Information tab key fields and buttons

Common fields and buttons

Some fields and buttons are common to all Inventory Maintenance screen tabs.

Field	Description
Item Code	Unique code identifying the item. For reporting integrity, this item code can never be used by another item.
Item Description	Description of the item used throughout the Portal. This description is not used on the Point of Sale. See *Inventory Management - Point of Sale tab* on page 88.
Site	The site selected for the current item configuration. Items can be configured on a per-site basis, offering different prices, availability or procurement management per site. See *Copying an item to another site* on page 58.

Field	Description
Last Change	Date this item was last changed, and the name of the Portal operator who changed it.
Created	Date the item was created.
	Switch the Inventory Maintenance screen to another item. See *Finding an item with a search field* on page 56.
	Create a new item. See *Creating a new item* on page 47.
	Save changes to the item.

Information tab key fields and buttons

Field	Description
Brand	Select the brand of the item, if relevant. **Note:** This field name and what you use this field for depends on your Portal configuration.
Style	Select the style variation of the item, if relevant. **Note:** This field name and what you use this field for depends on your Portal configuration.
Colour	Select the colour variation of the item, if relevant.

Field	Description
	Note: This field name and what you use this field for depends on your Portal configuration.
Size	Select the size variation of the item, if relevant. **Note:** This field is part of the Fashion matrix item variations and is not related to the Item Size field in the Details tab. **Note:** This field name and what you use this field for depends on your Portal configuration.
Pattern	Type a description of the item's pattern. **Note:** This field name and what you use this field for depends on your Portal configuration.
Label	Type information to include in a CD label. **Note:** This field name and what you use this field for depends on your Portal configuration.
Date of Release	Type the date the item was first available for sale. **Note:** This field name and what you use this field for depends on your Portal configuration.
Instructions	Type any instructions relevant to the item.
Show Brand Grid	Open the stock-on-hand report for all items of this brand. See *Brand Grid report* on page 250.

Field	Description
Show Fashion Grid	Open the stock-on-hand report for all items of this style. See *Style Grid report* on page 258.
Product Weight	Type the weight of the item.
Product Height	Type the height of the item.
Product Width	Type the width of the item.
Product Depth	Type the depth of the item.
Tray Size	Type the tray size required to store the item. This information is used to aid predictive cutting.

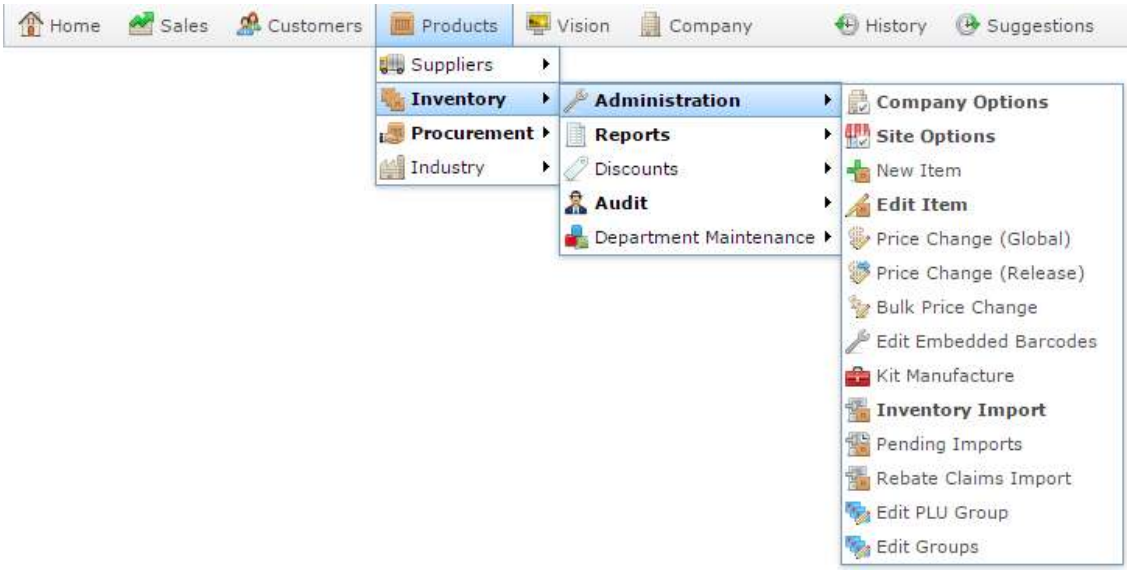
Inventory Management - Ingredients tab

Use the Ingredients tab of the Inventory Management screen to manage nutritional information about an item, for printing on labels.

Opening the Ingredients tab

To open the Ingredients tab:

1. Press Products in the main menu bar.
2. Press **Inventory** > **Administration** > **Edit Item**.



3. Search for the item you want to edit.

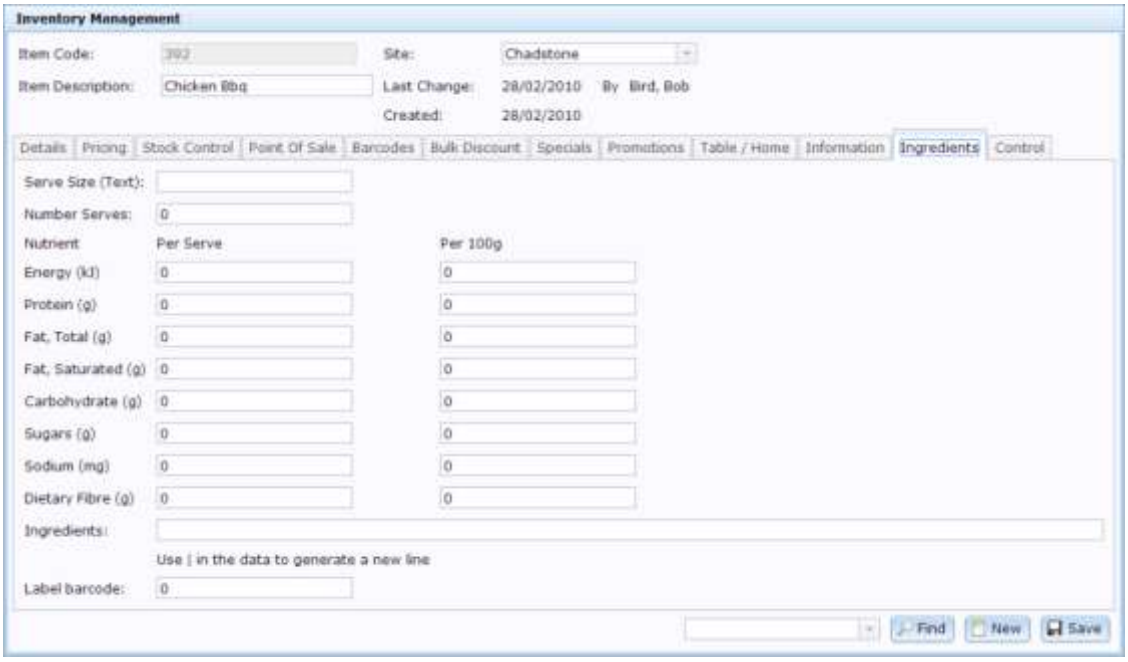
   See *Finding an item using the search screen* on page 50.

   > **Note:** If you want to create a new item, see *Creating a new item* on page 47.

   The Details tab of the Inventory Management screen is displayed.

4. Press the Ingredients tab.

   The Ingredients tab of the Inventory Management screen is displayed.

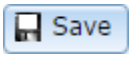


Inventory Management - Ingredients tab key fields and buttons

Common fields and buttons

Some fields and buttons are common to all Inventory Maintenance screen tabs.

Field	Description
Item Code	Unique code identifying the item. For reporting integrity, this item code can never be used by another item.
Item Description	Description of the item used throughout the Portal. This description is not used on the Point of Sale. See *Inventory Management - Point of Sale tab* on page 88.
Site	The site selected for the current item configuration. Items can be configured on a per-site basis, offering different prices, availability or procurement management per site. See *Copying an item to another site* on page 58.

Field	Description
Last Change	Date this item was last changed, and the name of the Portal operator who changed it.
Created	Date the item was created.
	Switch the Inventory Maintenance screen to another item. See *Finding an item with a search field* on page 56.
	Create a new item. See *Creating a new item* on page 47.
	Save changes to the item.

Ingredients tab key fields and buttons

Field	Description
Serve Size (Text)	Type a description of a single serving of this item. Serving size may be described as a specified weight or volume such as "150g", or as a number with a descriptor, such as "2 pieces" or "1 scoop".
Number Serves	Type the number of serves contained in one unit of the item.
Energy (kJ) Per Serve	Type the number of kilojoules contained in a single serve of the item.
Energy (kJ) Per 100g	Type the number of kilojoules contained in 100 grams of the item.

Field	Description
Protein (g) Per Serve	Type the grams of protein contained in a single serve of the item.
Protein (g) Per 100g	Type the grams of protein contained in 100 grams of the item.
Fat, Total (g) Per Serve	Type the grams of fat contained in a single serve of the item.
Fat, Total (g) Per 100g	Type the grams of fat contained in 100 grams of the item.
Fat, Saturated (g) Per Serve	Type the grams of saturated fat contained in a single serve of the item.
Fat, Saturated (g) Per 100g	Type the grams of saturated fat contained in 100 grams of the item.
Carbohydrate (g) Per Serve	Type the carbohydrates contained in a single serve of the item.
Carbohydrate (g) Per 100g	Type the grams of carbohydrates contained in 100 grams of the item.
Sugars (g) Per Serve	Type the grams of sugars contained in a single serve of the item.
Sugars (g) Per 100g	Type the grams of sugars contained in 100 grams of the item.

Field	Description
Sodium (mg) Per Serve	Type the milligrams of sodium contained in a single serve of the item.
Sodium (mg) Per 100g	Type the milligrams of sodium contained in 100 grams of the item.
Dietary Fibre (g) Per Serve	Type the grams of dietary fibre contained in a single serve of the item.
Dietary Fibre (g) Per 100g	Type the grams of dietary fibre contained in 100 grams of the item.
Ingredients	Type the ingredients contained in the item, in descending order of proportion so the ingredient which primarily make up the item is listed first. **Tip:** Type the pipe (|) symbol wherever you want to start a new line.
Label barcode	Type the barcode to be printed on the item label.

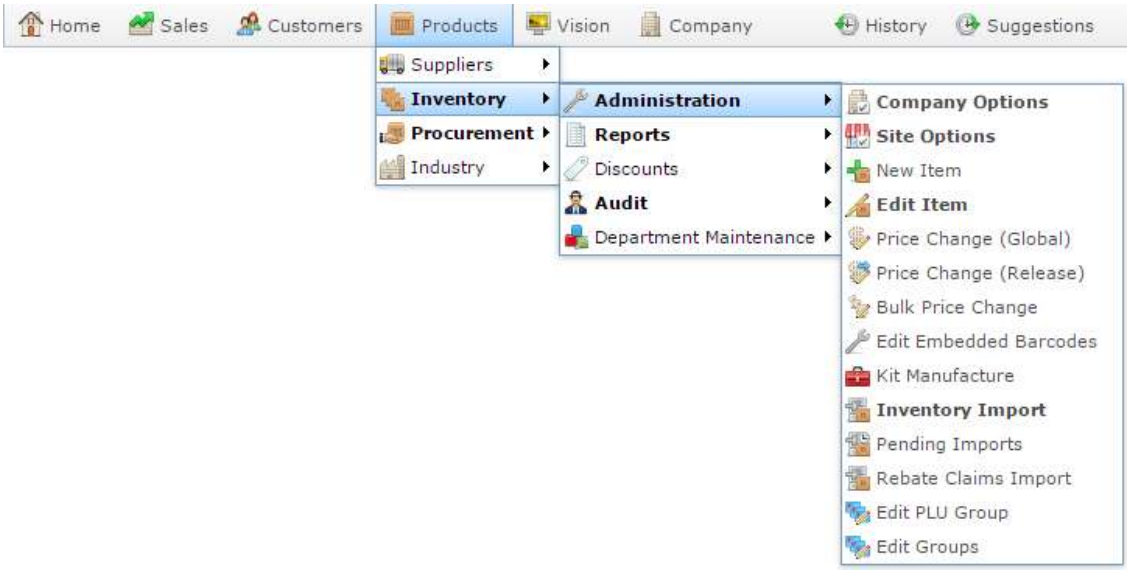
Inventory Management - Control tab

Use the Control tab of the Inventory Management screen to access item features such as kit maintenance, supplier cross references, item renaming or site-copying and item labels.

Opening the Control tab

To open the Control tab:

1. Press Products in the main menu bar.
2. Press **Inventory** > **Administration** > **Edit Item**.



3. Search for the item you want to edit.

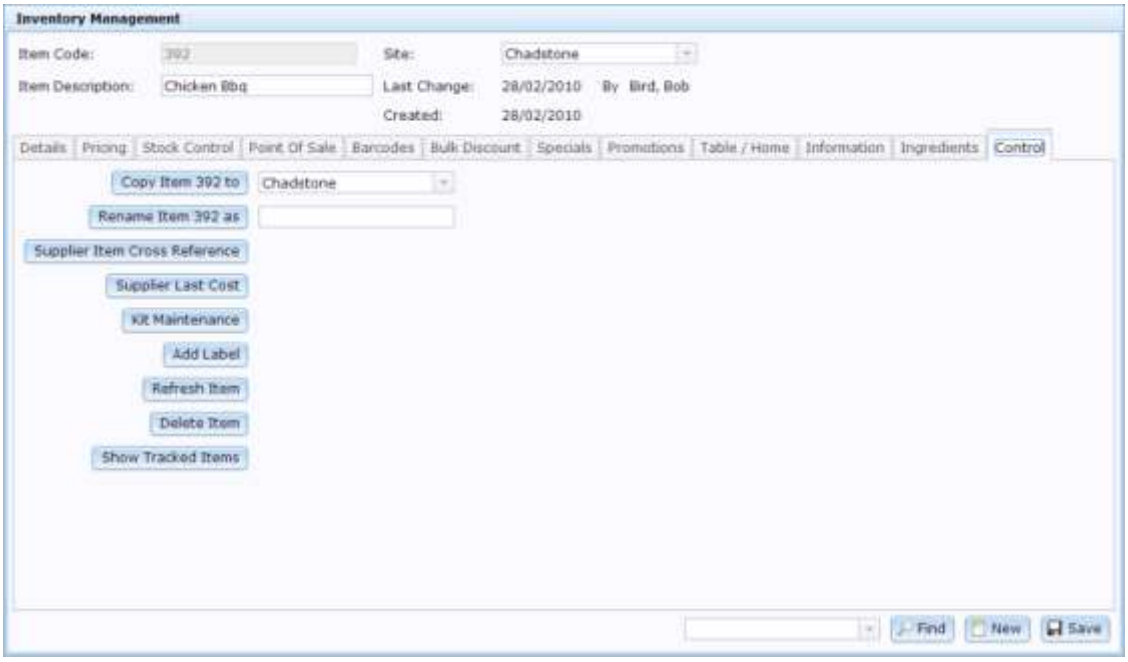
   See *Finding an item using the search screen* on page 50.

   > **Note:** If you want to create a new item, see *Creating a new item* on page 47.

   The Details tab of the Inventory Management screen is displayed.

4. Press the Control tab.

   The Control tab of the Inventory Management screen is displayed.



Inventory Management - Control tab key fields and buttons

Common fields and buttons

Some fields and buttons are common to all Inventory Maintenance screen tabs.

Field	Description
Item Code	Unique code identifying the item. For reporting integrity, this item code can never be used by another item.
Item Description	Description of the item used throughout the Portal. This description is not used on the Point of Sale. See *Inventory Management - Point of Sale tab* on page 88.
Site	The site selected for the current item configuration. Items can be configured on a per-site basis, offering different prices, availability or procurement management per site. See *Copying an item to another site* on page 58.

Field	Description
Last Change	Date this item was last changed, and the name of the Portal operator who changed it.
Created	Date the item was created.
Find	Switch the Inventory Maintenance screen to another item. See *Finding an item with a search field* on page 56.
New	Create a new item. See *Creating a new item* on page 47.
Save	Save changes to the item.

Control tab key fields and buttons

Field	Description
Copy Item 392 to	Select a site to copy the item's configuration for this site into. Any existing configuration of the selected site is not overridden by the current configuration. See *Copying an item to another site* on page 58.
Rename Item 392 as	Type a new item code to set the item to. The new item code must not be in use by another item.
Supplier Item Cross Reference	Press to display the Creditor Cross Reference screen to create a cross reference with a creditor for this item. See *Creditor Cross Reference screen*.

Field	Description
Supplier Last Cost	Press to display the creditor's last cost report for this item.
Kit Maintenance	Press to display the Kit Maintenance screen to add this item to a kit. See *Managing referrals and kits* on page 8.
Add Label	Select to add a label to the item. See *Requesting a label for an item*.
Refresh Item	Refresh the item information in the Point of Sale.
Delete Item	Select to permanently delete the item from your inventory. **Note:** To preserve data integrity, items can only be deleted if there has been no sale or stock movement of the item.
Show Tracked Items	Press to display the Item Tracking Report for this item.

Online Inventory Upload / Price Change

Use the Online Inventory Upload / Price Change screen to upload a file into your inventory to either add new items to your inventory or overwrite prices for existing items in your inventory.

Creating the inventory upload file

Note: The upload information closely relates to the information available in the Item Maintenance screen. See *Inventory maintenance* on page 45.

The upload file must be a Comma Separated Value (CSV) file, using the following headers:

CSV Header	Description
LOCATION	Site code.
ITEM	Item code.
SUPP	Unique code identifying the supplier in the Portal.
SUPPLIER	Supplier name, if the supplier does not exist in the Portal.
CROSS REFERENCE	Supplier's code identifying the item.
RRP	Recommended retail price of the item.
COST	Cost of the item.
BARCODE	Item barcode.

CSV Header	Description
BARCODE1	Item barcode.
BARCODE2	Item barcode.
BARCODE3	Item barcode.
BARCODE4	Item barcode.
BARCODE5	Item barcode.
DESCRIPTION	Item description.
POSDESCRIPTION	Description of the item displayed on the Point of Sale.
DEPT	Department item belongs to.
RANGE	Item range, if you are using multiple department levels.
PACK	Number of units in a pack of this item.
SIZE	Size of the item.
TYPE	Item type.
BRAND -> Brand ID	Unique code identifying the brand of the item.

CSV Header	Description
BRAND NAME -> brand name if brand does not exist	Name of the brand, if it does not already exist in the Portal.
WEIGHED	Type **T** if this item is a weighed item, **F** if it is sold per-unit.
USE BY	The use-by date of this item.
GST -> T / F	Whether GST is applied to this item. Type **T** if GST is applied, **F** if this item is GST-free.
REFERITEM	The item code of the referred item.
REFERRATIO	The referral ration of this item.
SENDTOTERMINAL	Type **T** to allow this item to be sold on the Point of Sale, **F** to disable.
PRINTER	Printer sales of this item should be sent to.
MENU	Name of the menu area this item belongs to, if applicable.
MENUENABLE	Type **T** to enable table service for this item, **F** to disable.
MODIFIER	Modified group this item belongs to, if applicable.

CSV Header	Description
LABELTYPE	Label for this item.
SCALELABEL	Scale label for this item.
INFORMATION	Additional information regarding this item.
INGREDIENTS	List of ingredients included in this item.
TARE	Tare weight for this item.
SERVING SIZE	Serving size of this item.
QTY PER SERVE	Qty or units per serve.
KJ SERVE	Kilojoules per serving.
KJ 100	Kilojoules per 100 grams
PROTIEN SERVE	Protein per serving.
PROTEIN 100	Protein per 100 grams
FAT TOTAL SERVE	Fat per serving.
FAT TOTAL 100	Fat per 100 grams

CSV Header	Description
FAT SAT SERVE	Saturated fat per serving.
FAT SAT 100	Saturated Fat per 100 grams
CARB SERVE	Carbohydrates per serving.
CARB 100	Carbohydrates per 100 grams
SUGAR SERVE	Sugar per serving.
SUGAR 100	Sugar per 100 grams
FIBRE SERVE	Fibre per serving.
FIBRE 100	Fibre per 100 grams
SODIUM SERVE	Sodium per serving.
SODIUM 100	Sodium per 100 grams

Creating the special price upload file:

Use these headers in addition to the regular upload file headers to specify special prices:

CSV Header	Description
SPECIALPRICE	Special price to apply.
PERCENT	Percentage discount off the item.
START	Date the price special starts.
END	Date the price special ends.

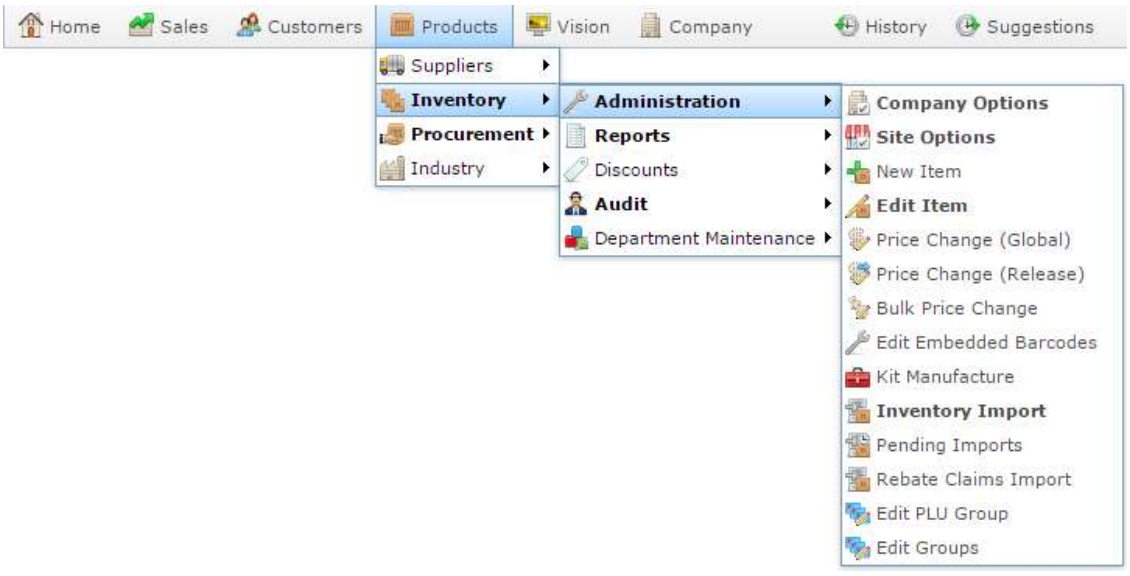
See *Importing items into your inventory from a file* on page 68.

Also see *Importing new item prices from a file* on page 69.

Opening the Online Inventory Upload / Price Change screen

To open the Online Inventory Upload / Price Change screen:

1. Press Products.
2. Press **Inventory > Administration > Inventory Import**.



The Online Inventory Upload / Price Change screen is displayed.

Online Inventory Upload / Price Change screen key fields and buttons

Field	Description
Site	The site to import the file into.
Filename	The name of the file you have selected to import.
Browse...	Launch the Open File window to select a file to import from your computer.
Update	Press to start importing the file.

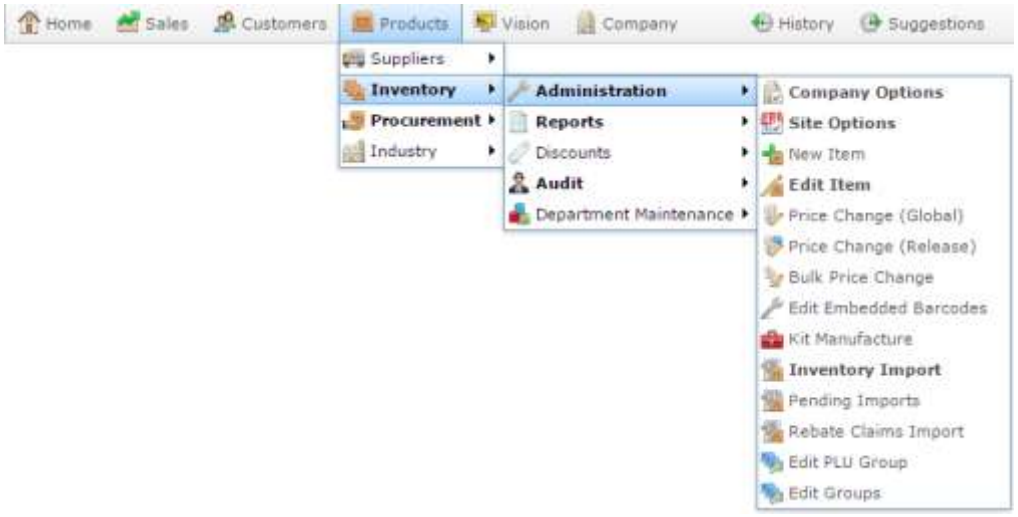
Import Pending Upload report

Use the Import Pending Upload report to view files that are being uploaded to the Portal.

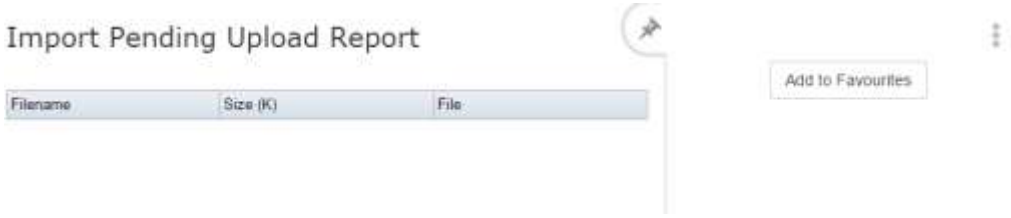
Opening the Import Pending Upload report

To open the Import Pending Upload report:

1. Press Products.
2. Press **Inventory > Administration > Pending Imports**.



The Online Rebate Claims Upload screen is displayed.



Import Pending Upload report key fields and buttons

Filters area

Use this area to filter the results shown in the report.

Field	Description
Add to Favourites	Press to add this report to your Portal favourites for easier access.

Report area

This area displays report information.

> **Note:** Not all fields may be displayed at once. Some fields depend on your filter field selections.

Field	Description
Filename	Name of the file being uploaded.
Size (K)	Size in kilobytes of the file being uploaded.
File	Name of the file.

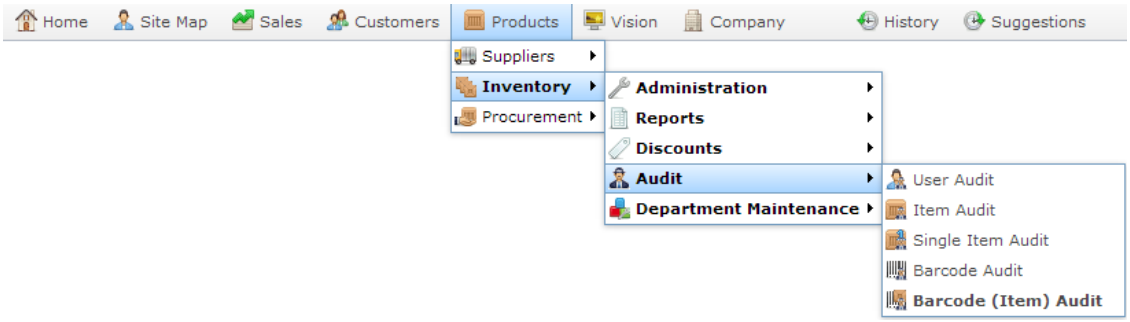
Single Item Audit report

Use the Single Item Audit report to view the edits made to a specific item over a period of time.

Opening the Single Item Audit report

To open the Single Item Audit report:

1. Press Products from the menu bar.
2. Press **Inventory > Audit > Single Item Audit**.

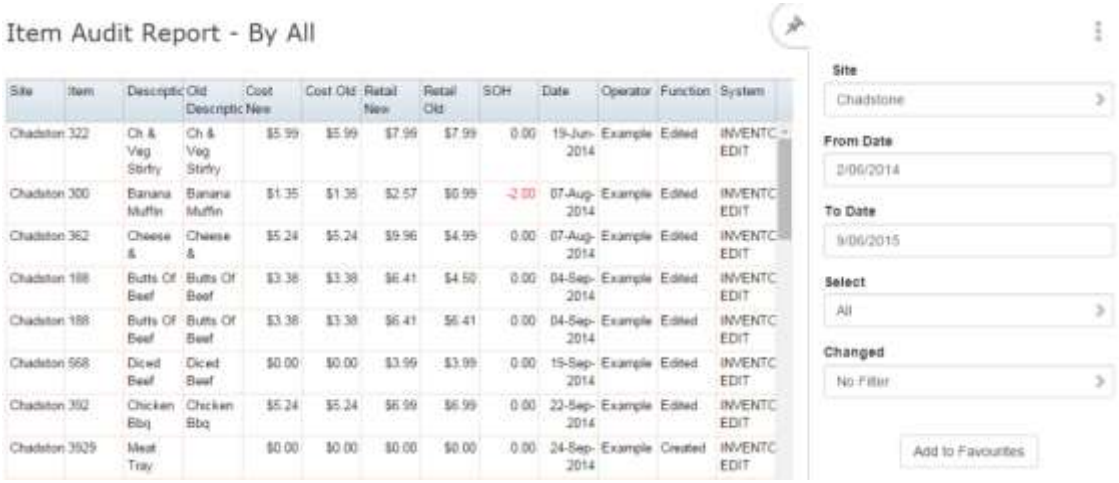


The Find Item screen is displayed.

3. Search for the item you want to audit.

   See *Finding an item using the search screen* on page 50.

   The Single Item Audit report is displayed.



Site	Item	Descriptic	Old Descriptic	Cost New	Cost Old	Retail New	Retail Old	SOH	Date	Operator	Function	System
Chadston	322	Ch & Veg Stirfry	Ch & Veg Stirfry	$5.99	$5.99	$7.99	$7.99	0.00	19-Jun-2014	Example	Edited	INVENTC EDIT
Chadston	300	Banana Muffin	Banana Muffin	$1.35	$1.35	$2.57	$0.99	-2.00	07-Aug-2014	Example	Edited	INVENTC EDIT
Chadston	362	Cheese &	Cheese &	$5.24	$5.24	$9.96	$4.99	0.00	07-Aug-2014	Example	Edited	INVENTC EDIT
Chadston	188	Butts Of Beef	Butts Of Beef	$3.38	$3.38	$6.41	$4.50	0.00	04-Sep-2014	Example	Edited	INVENTC EDIT
Chadston	188	Butts Of Beef	Butts Of Beef	$3.38	$3.38	$6.41	$6.41	0.00	04-Sep-2014	Example	Edited	INVENTC EDIT
Chadston	568	Diced Beef	Diced Beef	$0.00	$0.00	$3.99	$3.99	0.00	15-Sep-2014	Example	Edited	INVENTC EDIT
Chadston	392	Chicken Bbq	Chicken Bbq	$5.24	$5.24	$6.99	$6.99	0.00	22-Sep-2014	Example	Edited	INVENTC EDIT
Chadston	3929	Meat Tray		$0.00	$0.00	$0.00	$0.00	0.00	24-Sep-2014	Example	Created	INVENTC EDIT

Single Item Audit report key fields

Filters area

Use this area to filter the results shown in the report.

Field	Description
Add to Favourites	Press to add this report to your Portal favourites for easier access.
Site	Select the site to report on.
Date / **Date From and Date To /** **As of**	Select the date or date period to report on.
Select	Filter the report to items that were: ▪ Created. ▪ Edited. ▪ Deleted. ▪ Or display all modified items.
Changed	Filter the report to items that have been edited in: ▪ Their description. ▪ Their retail price. ▪ Their cost. ▪ Or display all modified items.

Report area

This area displays report information.

> **Note:** Not all fields may be displayed at once. Some fields depend on your filter field selections.

Field	Description
Item / Description	Description of the item. **Note:** Click on the description to access other options in a popup menu.
Site	Site the item belongs to.
Item Number / Item	The item code of the item.
Old Description	Previous description of the item.
Cost New	New cost the item was given.
Cost Old	Previous cost of the item.
Retail New	New retail price the item was given.
Retail Old	Previous retail price of the item.

Field	Description
SOH	Stock on hand of the time.
Date	Date the change occurred.
Operator	Portal operator responsible for the change.
Function	The type of edit process, for example, created, edited or deleted.
System	Portal system responsible for the change. For example, **INVENTORY EDIT** indicates an edit through Inventory Maintenance.

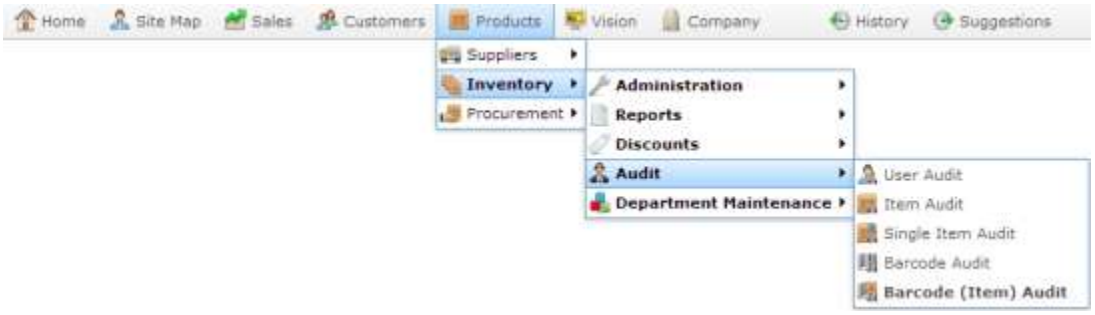
Item Audit report

Use the Item Audit report to view the edits made to items over a period of time.

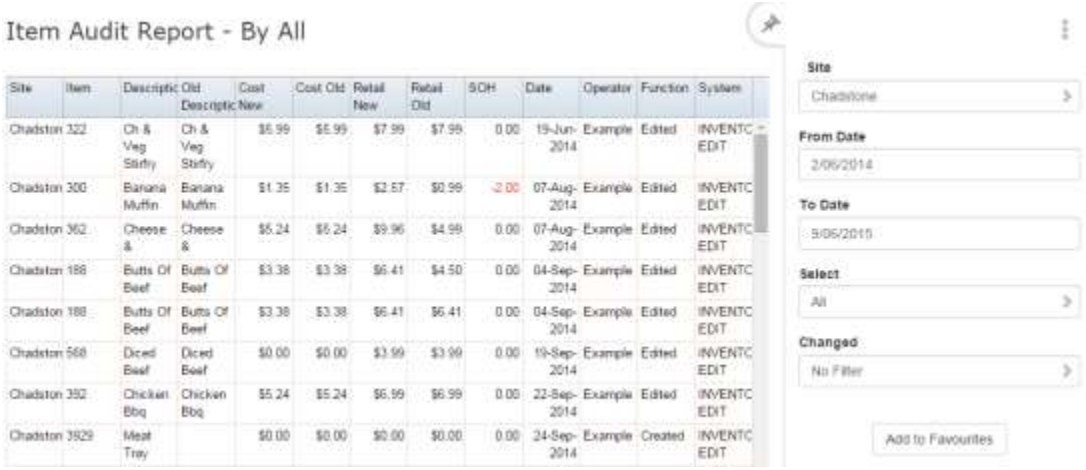
Opening the Item Audit report

To open the Item Audit report:

1. Press Products from the menu bar.
2. Press **Inventory > Audit > Item Audit**.



The Item Audit report is displayed.



Item Audit report key fields

Filters area

Use this area to filter the results shown in the report.

Field	Description
Add to Favourites	Press to add this report to your Portal favourites for easier access.
Site	Select the site to report on.
Date / **Date From and Date To /** **As of**	Select the date or date period to report on.
Select	Filter the report to items that were: ▪ Created. ▪ Edited. ▪ Deleted. ▪ Or display all modified items.
Changed	Filter the report to items that have been edited in: ▪ Their description. ▪ Their retail price. ▪ Their cost. ▪ Or display all modified items.

Report area

This area displays report information.

> **Note:** Not all fields may be displayed at once. Some fields depend on your filter field selections.

Field	Description
Item / Description	Description of the item. **Note:** Click on the description to access other options in a popup menu.
Site	Site the item belongs to.
Item Number / Item	The item code of the item.
Old Description	Previous description of the item.
Cost New	New cost the item was given.
Cost Old	Previous cost of the item.
Retail New	New retail price the item was given.
Retail Old	Previous retail price of the item.

Field	Description
SOH	Stock on hand of the time.
Date	Date the change occurred.
Operator	Portal operator responsible for the change.
Function	The type of edit process, for example, created, edited or deleted.
System	Portal system responsible for the change. For example, **INVENTORY EDIT** indicates an edit through Inventory Maintenance.

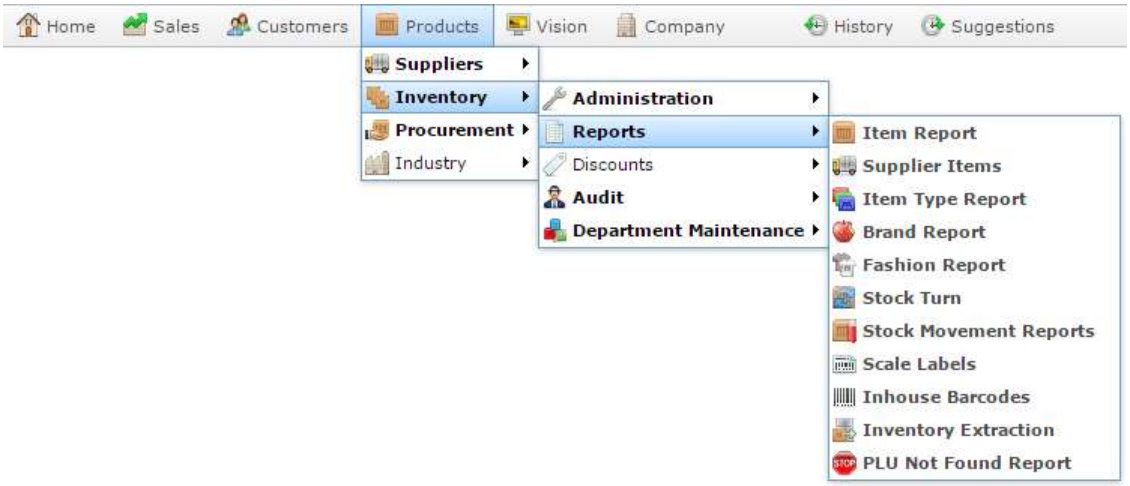
Item report

Use the Item report to view an overview of your items.

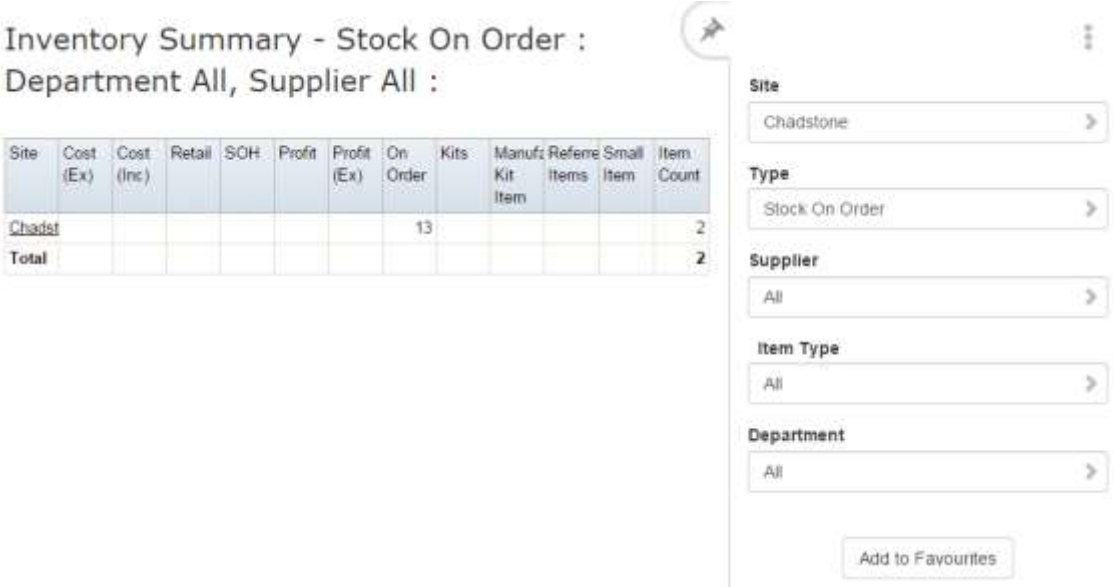
Opening the Item report

To open the Item report:

1. Press Products from the menu bar.
2. Press **Inventory > Reports > Item Report**.



The Item report is displayed.



Item report key fields

Filters area

Use this area to filter the results shown in the report.

Field	Description
Add to Favourites	Press to add this report to your Portal favourites for easier access.
Site	Select the site to report on.
Type	Select to change the report to other item criteria such as stock-on-hand levels.
Supplier / Creditor	Select to restrict the report to a particular supplier, or to items where the supplier has not been selected.
Item Type	Select to filter the report by item type.
Department	Select to filter the report by department.
Type	Filter the report to: **Stock On Hand** — Items with stock-on-hand levels above zero. **Stock Above Maximum Level** — Items with stock-on-hand levels above the maximum stock level listed in the Stock Control tab of Inventory Maintenance. **Stock On Order** — Items with stock currently on order.

Field	Description
Stock Below Reorder Level	Items with stock-on-hand levels below the reorder level listed in the Stock Control tab of Inventory Maintenance.
Zero Priced Items	Items priced at zero.
Non Weighed Items	Items that are not sold by weight.
Weighed Items	Items that are sold by weight.
Sold Items	Items that have been sold.
Non Sold Items	Items that have not been sold.
Referred Items	Items that refer their sales to another stocked item. See *Managing referrals and kits* on page 8.
Kits	Items that are a kit comprised of other items.
Manufactured Kit Item	Items that are a kit comprised of other items, produced on the premises.
Non POS Item	Items that are not sent to the point of sale system.
POS Items	Items that are sent to the point of sale system.
Small Item	Items that are marked too small to take a barcode.

Field	Description
All	All items.

Report area

This area displays report information.

Note: Not all fields may be displayed at once. Some fields depend on your filter field selections.

Field	Description
Site	Site the item belongs to.
Cost (Ex)	The total cost, excluding tax, of the stock-on-hand of all selected items at this site.
Cost (Inc)	The total cost, including tax, of the stock-on-hand of all selected items at this site.
Retail	The total retail amount of the stock-on-hand of all selected items at this site.
SOH	The total stock-on-hand of all selected items at this site.
Profit	The total profit amount of the stock-on-hand of all selected items at this site.
Profit (Ex)	The total profit amount, excluding tax, of the stock-on-hand of all selected items at this site.
On Order	The total number of units on order of the selected items at this site.
Kits	The total number of kit items in the selected items at this site.

Field	Description
Manufactured Kit	The total number of manufactured kit items in the selected items at this site.
Referred Items	The total number of referred items in the selected items at this site. See *Managing referrals and kits* on page 8.
Small Item	The total number of items marked as too small to carry a barcode in the selected items at this site.
Item Count	The total number of different items the report is aggregating.

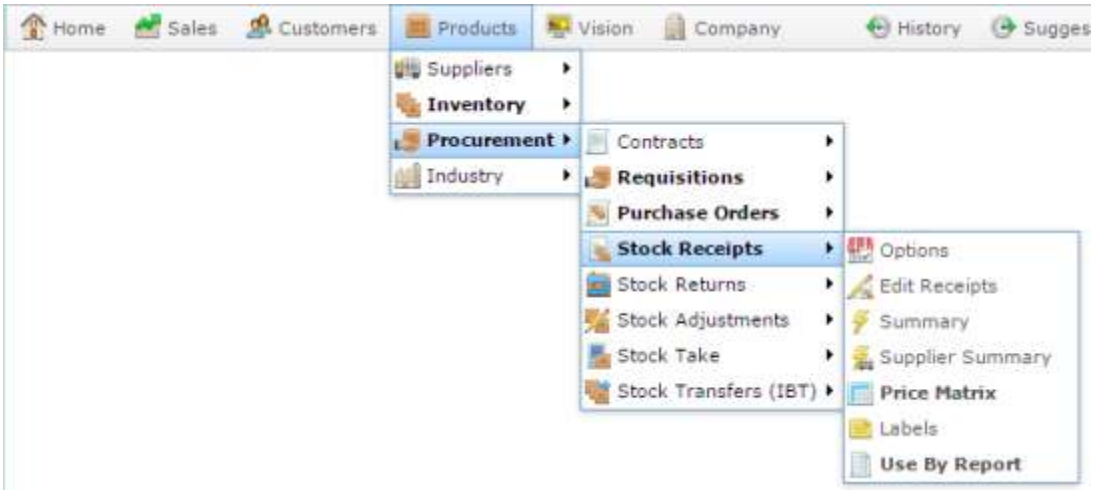
Use by report

Use the Use by report to list items with units that are due to expire within the specified period.

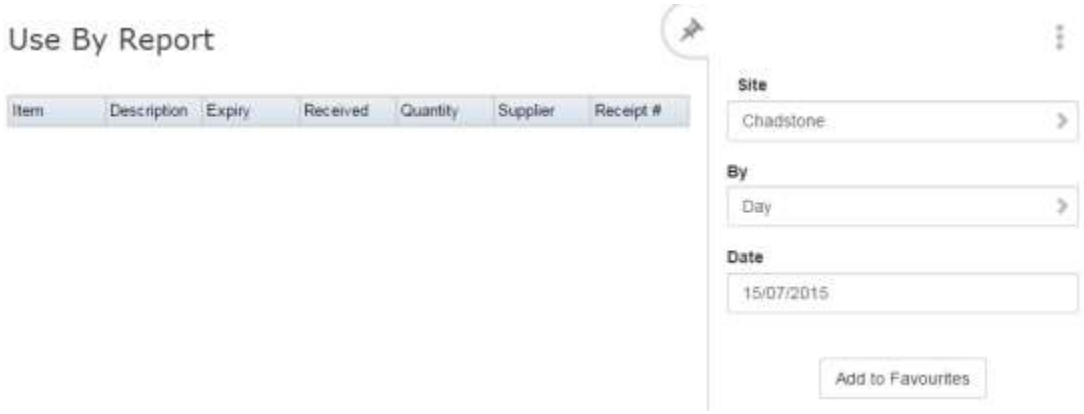
Opening the Use by report

To open the Use by report:

1. Press Products from the menu bar.
2. Press **Procurement > Stock Receipts > Use By report**.



The Use by report is displayed.



Use by report key fields

Filters area

Use this area to filter the results shown in the report.

Field	Description
	Press to add this report to your Portal favourites for easier access.
Site	Select the site to report on.
By	Select to display the report for a specific day, week or month.
Date / **Date From and Date To /** **As of**	Select the date or date period to report on.

Report area

This area displays report information.

> **Note:** Not all fields may be displayed at once. Some fields depend on your filter field selections.

Field	Description
Item / Description	Description of the item. **Note:** Click on the description to access other options in a popup menu.
Supplier	Supplier of the item.
Item Number / Item	The item code of the item.
Expiry	Date the items are due to expire.
Received	Date the items were received
Quantity	Number of units of items received on this date with this expiry.
Receipt #	Unique code identifying the stock receipt for these items.

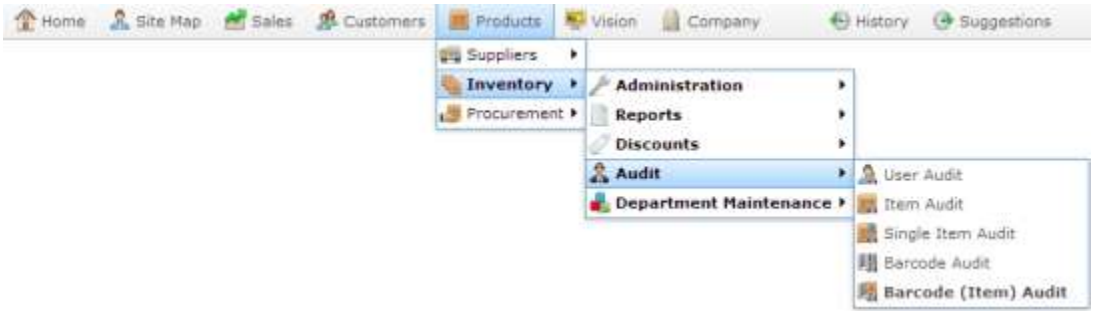
User Audit report

Use the User Audit report to view the number of items edited by each user over a given period.

Opening the User Audit report

To open the User Audit report:

1. Press Products from the menu bar.
2. Press **Inventory > Audit > User Audit**.



The User Audit report is displayed.

Name	Site	Month End 31-Dec-2013	Month End 31-Jan-2014	Month End 28-Feb-2014	Month End 31-Mar-2014	Month End 30-Apr-2014	Month End 31-May-2014	Month End 30-Jun-2014	Total
Example	Chadstone	173				1		1	175
bob	Chadstone						2		2
Total:		173				1	2	1	177

User Audit report key fields

Filters area

Use this area to filter the results shown in the report.

Field	Description
	Press to add this report to your Portal favourites for easier access.
Site	Select the site to report on.
By	Select to display the report for a specific day, day of the week, week, month or year.
Date / **Date From and Date To /** **As of**	Select the date or date period to report on.

Report area

This area displays report information.

Note: Not all fields may be displayed at once. Some fields depend on your filter field selections.

Field	Description
Login / Name	The user's login name.
Site	Site the items were edited for.
Date period	Number of items edited by this Portal operator for this period.

Managing item options and modifiers

You can add modifiers to items at the moment of purchase to record slight differences in the item, or customer requests. Item modifications are created just like normal items in the Portal and can be stocked, tracked, priced and managed just like normal items.

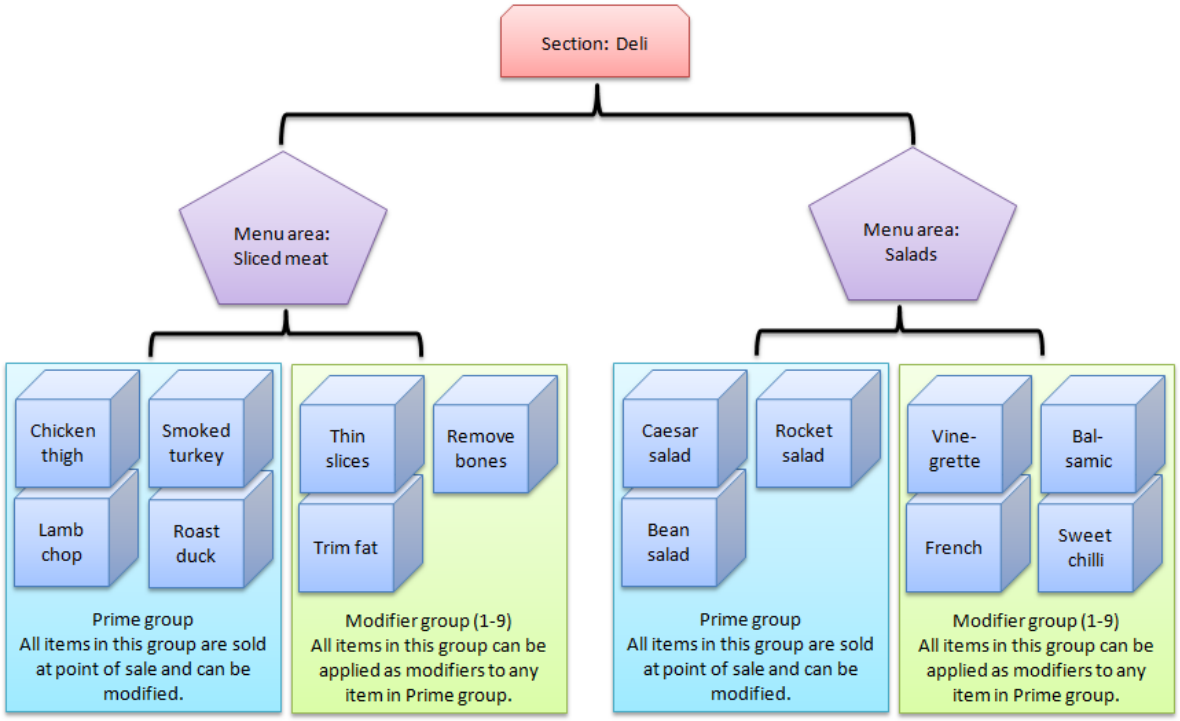
Note: To modify items, you must have table service enabled. See *Checking if table service is available for your portal* on page 158.

Menu areas and modifier groups

Item modifications use groups that are called menu areas. Items are classified as either:

- Prime items, which are the items that are sold at the Point of Sale.
- Modifier items, which modify the prime items.

A menu area contains both prime and modifier items. Any and all modifier items within a menu area can be added to any of the prime items within that same group.



You can add as many items as you want to a single menu area, but items can only belong to one menu area, and a modifier from one menu area cannot be added to an item from a different menu area. This means you need to construct your menu areas carefully to group your items by the modifiers they share. An item can also only be a prime item or a modifier item; it cannot be both.

Tip: If you have a modifier item that you need to add to multiple menu areas, you can create a separate item for each menu area and use referrals to relate them all to the same 'stock' item. See *Managing referrals and kits* on page 8.

Sections

Sections are a means of grouping your menu areas. While the iZen Point of Sale does not distinguish by section, PDTs list menu areas by section to help structure the available options in a small screen space. If you are not using PDTs, sections are not important unless you want to group various menu areas together for reporting reasons.

What you can do:

- *Creating a table section* on page 160.
- *Creating a menu area* on page 162.
- *Creating a prime item* on page 164.
- *Creating a modifier item* on page 167.

Also see

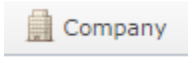
- *Table Section Report* on page 169.
- *Table Section Maintenance screen* on page 171.
- *Table Menu Report* on page 174.
- *Table Menu Maintenance screen* on page 177.
- *Inventory Management - Table / Home tab* on page 108.

Checking if table service is available for your portal

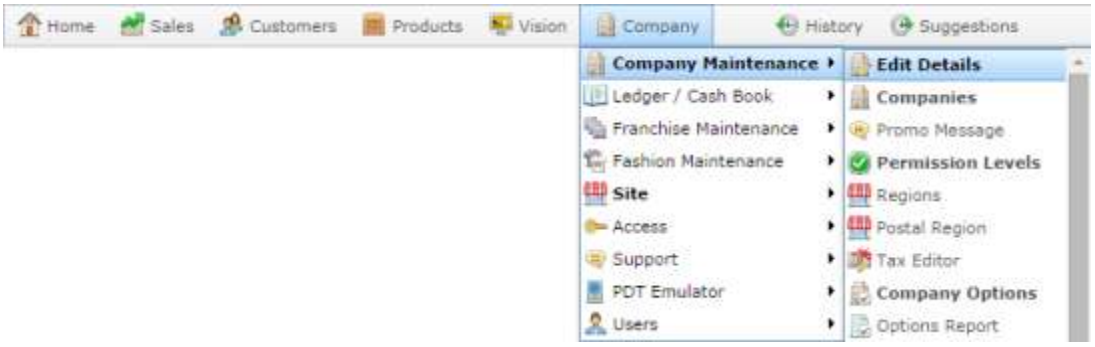
Before you can make use of table service features such as menu areas and item modifications, you must have the table service features enabled in your Portal configuration.

> **Note:** You must contact AMC Convergent IT to enable table service features if they are not enabled for your Portal configuration.

To check if table service is enabled :

1. Press 

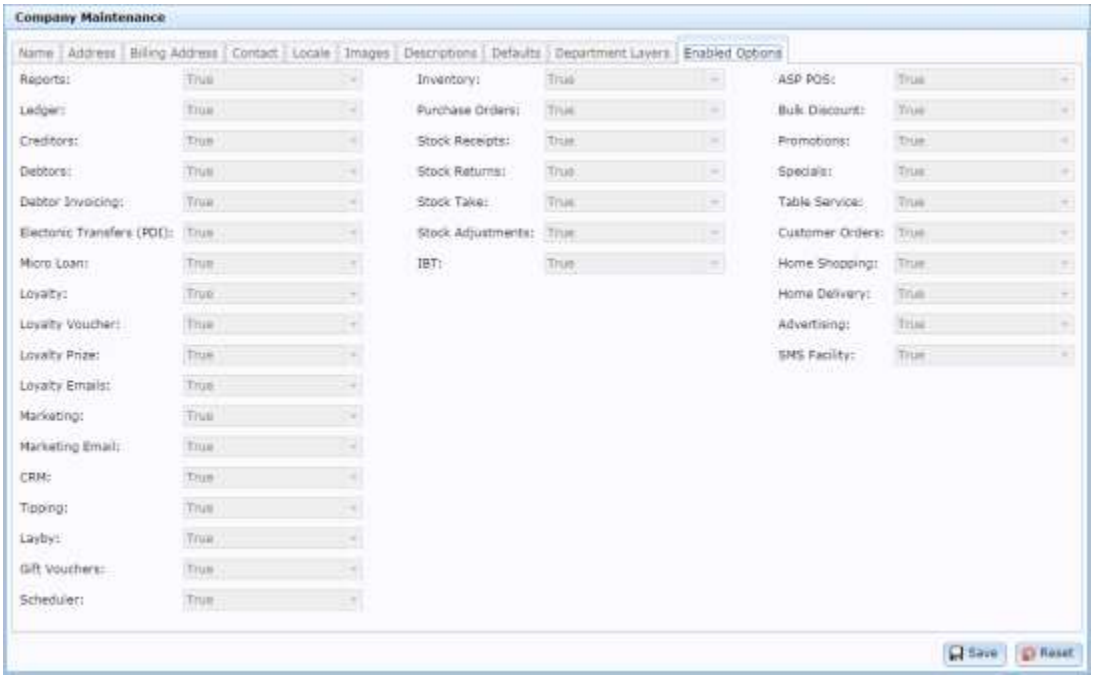
in the main menu bar.
2. Press **Company Maintenance** > **Edit Details**.



   The Company Maintenance screen is displayed.

3. Press the Enabled Options tab.

   The Enabled Options tab is displayed.



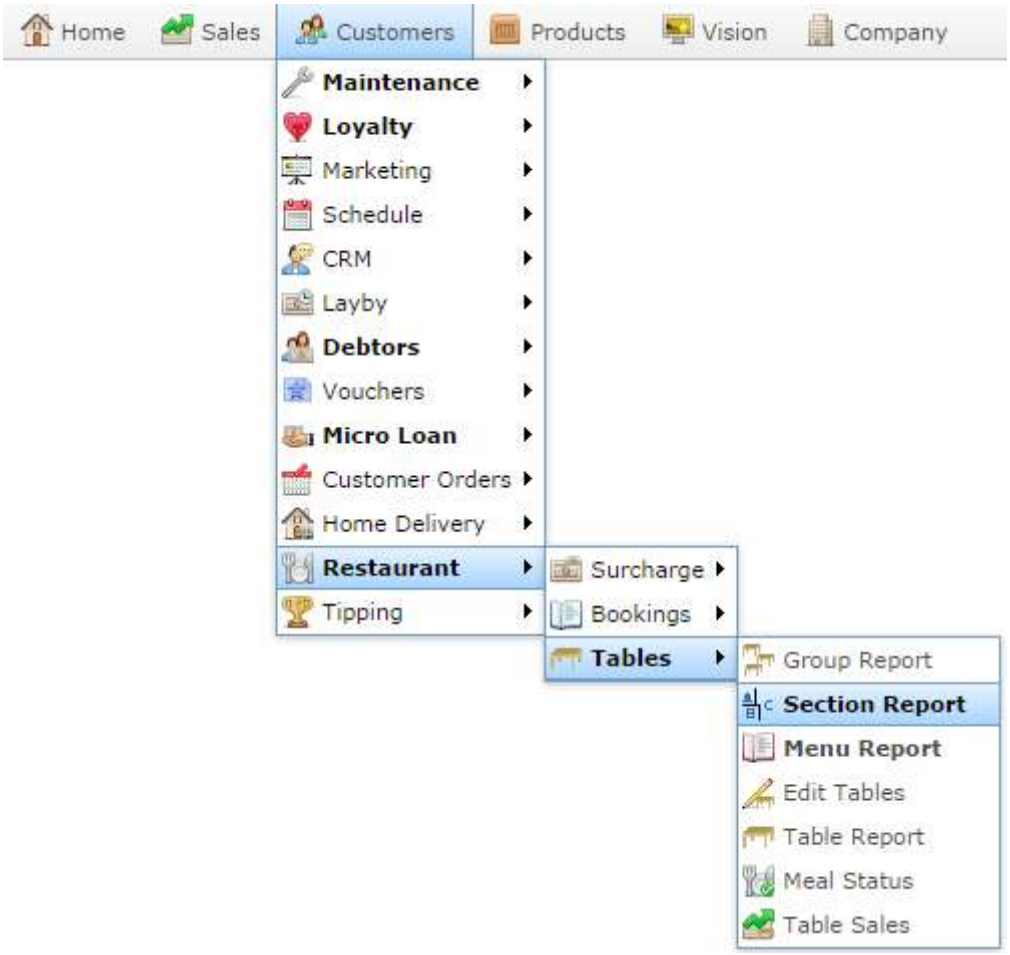
4. If **True** is selected on the **Table Service** drop-down list, then table service is enabled for your Portal.

Creating a table section

Create table sections to group menu areas for PDTs.

To create a table section:

1. Press Customers in the main menu bar.
2. Press **Restaurant** > **Tables** > **Section Report**.



The Table Section Report screen is displayed.

3. Press Create New Section.

The Table Section Maintenance screen is displayed.

4. Type a name for the table section in the **Section** field.
5. Type a **Description** of the section.
6. Select **True** in the **Enabled** drop-down list.
7. Type a **Sequence** number to display the section in order on the PDT.
8. Press Save.

   The table section is created. You can now add menu areas to the section. See *Creating a menu area* on page 162.

Creating a menu area

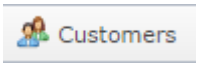
Create a menu area to either:

- Create a menu category such as Entrees, Soups or Mains.
- Group a set of modifier items with the prime items that they modify.

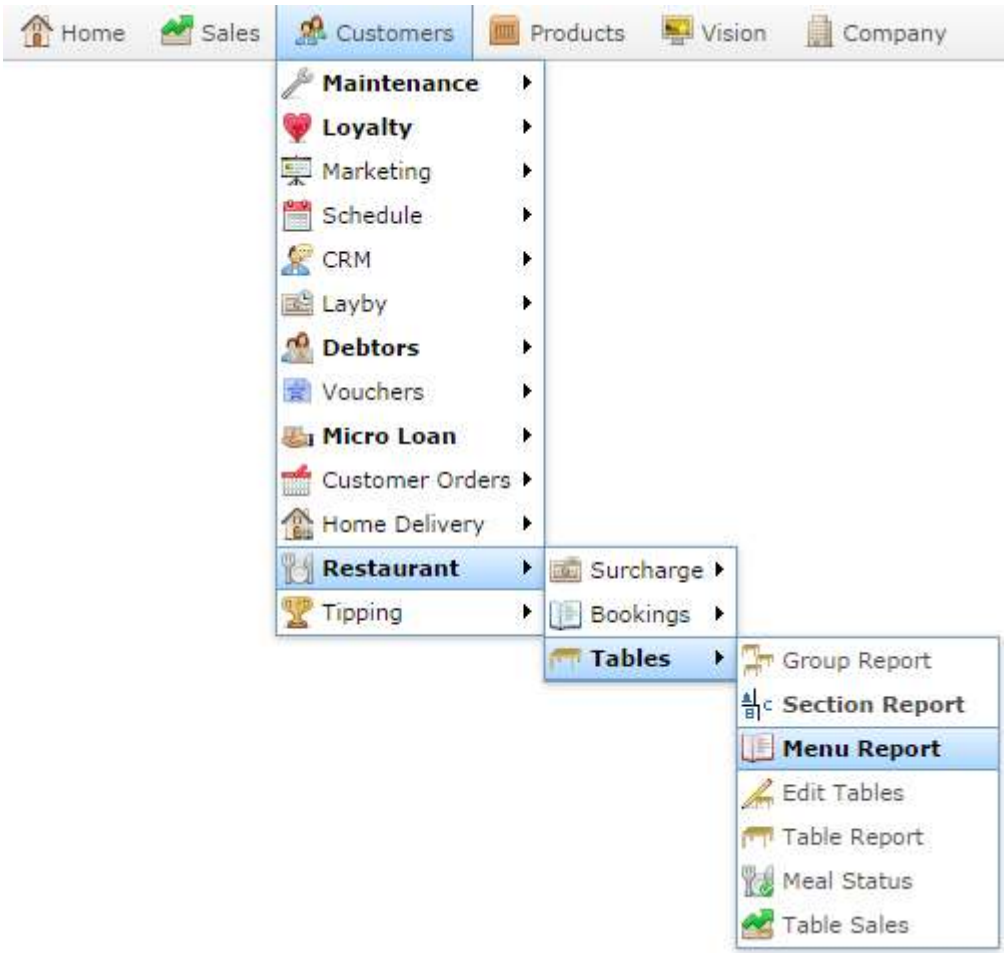
Menu areas sit within a table section. See *Creating a table section* on page 160.

Note: All modifier items included in this menu group can be applied to any prime item included in this group. Items can only be included in one menu area.

To create a menu area:

1. Press 

in the main menu bar.
2. Press **Restaurant** > **Tables** > **Menu Report**.

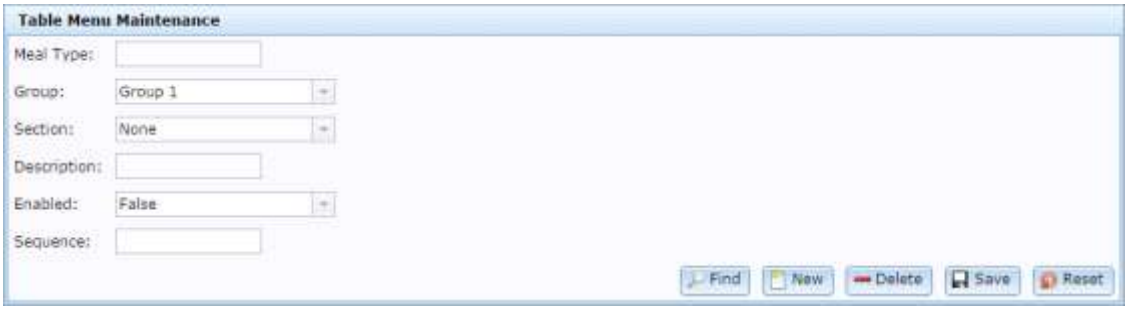


The Table Menu Report is displayed.

Menu	Section	Reference	Modifier Group	Sequence Order	Enabled
Alcoholic drinks	Main	DL	Group 1	5	✓
Deserts	Main	D	Group 1	4	✓
Entrees	Main	E	Group 1	2	✓
Main	Main	M	Group 1	3	✓
Meat cuts	Deli	Meats	Group 1	5	✓
Soft Drinks	Main	DS	Group 1	6	✓
Specials	Main	MOD	Group 1	8	✓
Starters	Main	S	Group 1	1	✓
Tea / Coffee	Main	T	Group 1	7	✓

3. Press Create New Menu Type.

   The Table Menu Maintenance screen is displayed.



4. Type a name for the menu area in the **Meal Type** field.

> **Tip:** The modifier group does not affect the menu area. You can leave the Group field set at Group 1.

5. Select the table **Section** from the drop-down list.

> **Note:** If you need to create a section, see *Creating a table section* on page 160.

6. Type a **Description** for the menu area.
7. Select True from the **Enabled** drop-down list.
8. Type a **Sequence** number to control the order the menu area appears in on a PDT.
9. Press Save.

   The menu area is created. You can now add items to the menu area.

   Creating a prime item on page 164.

   Also see *Creating a modifier item* on page 167.

Creating a prime item

Create a prime item to:

- Include it in a menu area such as "Soups" or "Desserts".
- Allow options to be added to it, such as preparation methods or other additional requests.

Prime items are sold directly in the Point of Sale. If you want to create an item to modify another item, see *Creating a modifier item* on page 167.

Note: If you are providing table service to customers, prime items are items that appear on the menu, such as a meal, side-order or drink.

Note: In order to create an item that can be modified, you must have table service enabled, and a table section and menu area configured. See *Creating a table section* on page 160. Also see *Creating a menu area* on page 162.

To create a prime item:

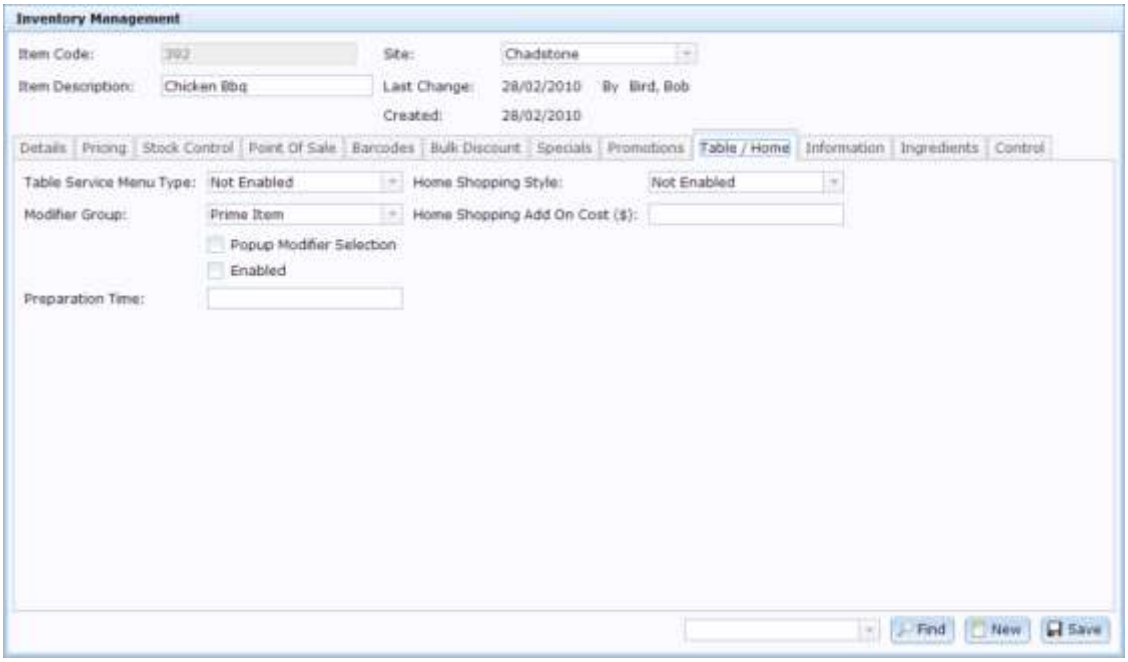
1. Find or create the item you want to be a prime item.

   See *Finding an item using the search screen* on page 50.

   Also see *Creating a new item* on page 47.

2. In Inventory Maintenance, press the Table/Home tab.

   The Table / Home tab is displayed.

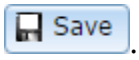


   See *Inventory Management - Table / Home tab* on page 108.

3. Select the menu area you want the prime item to use from the **Table Service Menu Type** drop-down list.

   Note: The item can have any of the modifier items included in this menu area applied to it.

4. Select **Prime Item** from the **Modifier Group** drop-down list.
5. Select the **Popup Modified Selection** field.
6. Select the **Enabled** field.
7. Type in any additional **Preparation Time** this modifier requires, if relevant.

8. Press 

.

   The prime item is created.

Creating a modifier item

Create a modifier item to add options to another item, such as a type of preparation, additional feature or request, or other modification.

Modifier items cannot be sold at the Point of Sale by themselves. If you want to create an item that can be modified, see *Creating a prime item* on page 164.

Note: If you are providing table service to customers, modifier items are pre-configured customer requests to edit the meal, side-order or drink. For example, adding milk to coffee, or a gluten-free option.

If you want to create a modifier item that does not track stock, see *Creating an item that does not track stock* on page 60.

Note: In order to create a modifier item, you must have table service enabled, and a table section and menu area configured. See *Creating a table section* on page 160. Also see *Creating a menu area* on page 162.

To create a modifier item:

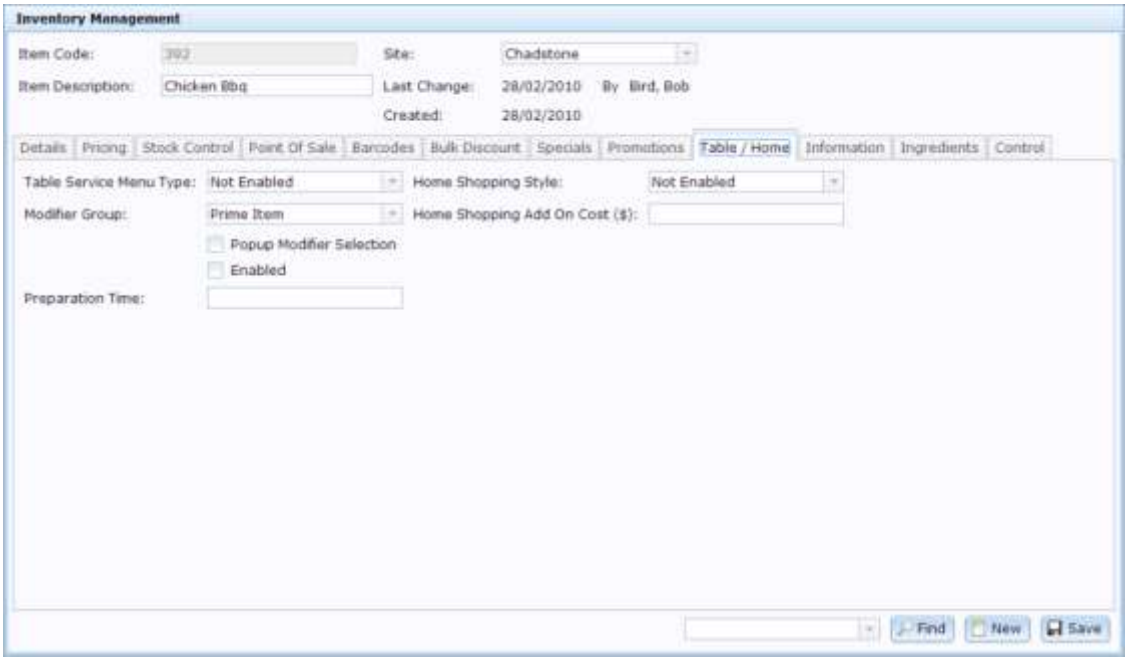
1. Find or create the item you want to be a modifier item.

   See *Finding an item using the search screen* on page 50.

   Also see *Creating a new item* on page 47.

2. In Inventory Maintenance, press the Table/Home tab.

   The Table / Home tab is displayed.



See *Inventory Management - Table / Home tab* on page 108.

3. Select the menu area you want the modifier item to use from the **Table Service Menu Type** drop-down list.

> **Note:** The modifier item can be applied to any prime item in the menu area.

4. Select one of the groups from the **Modifier Group** drop-down list.

> **Note:** It does not matter which group you select, as long as it is **not** the **Prime Item** group. The Portal treats all the groups as if they were one group.

5. Select the **Popup Modified Selection** field.
6. Select the **Enabled** field.
7. Type in any additional **Preparation Time** this modifier requires, if relevant.
8. Press Save.

   The modifier item is created.

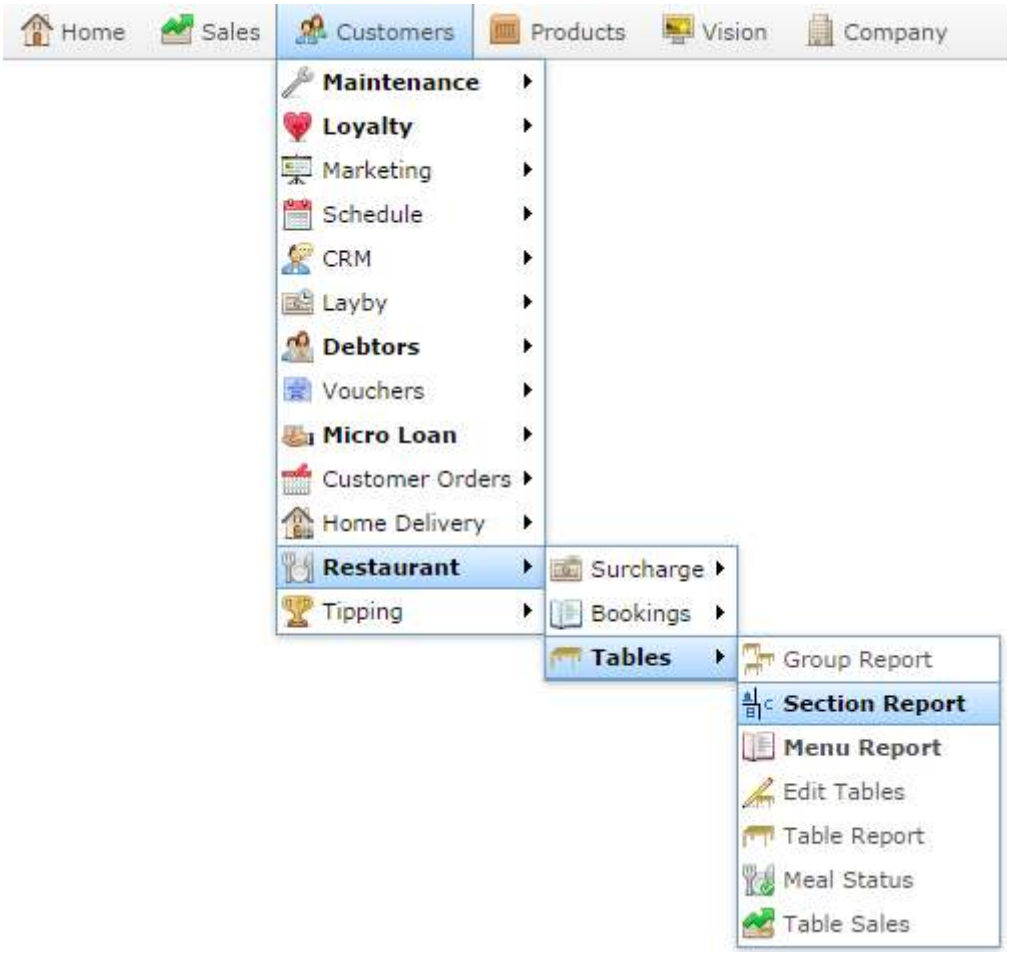
Table Section Report

Use this report to view and create table sections for table service.

Opening the Table Section Report

To open the Table Section Report:

1. Press Customers in the main menu bar.
2. Press **Restaurant** > **Tables** > **Section Report**.



The Table Section Report screen is displayed.

Table Section Report key fields and buttons

Field	Description
Add to Favourites	Press to add this report to your Portal favourites.
Create New Section	Press to create a new table section. See *Creating a table section* on page 160.
Description	Description of the table section. Press to edit the table section. See *Table Section Maintenance screen* on page 171.
Section	The name of the table section.
Sequence Order	Number indicating the order in which the table sections should appear on the PDT. Lower numbers appear first.
Enabled	Selected if this table section is available for use in the Portal.

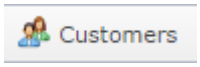
Table Section Maintenance screen

Use the Table Section Maintenance screen to create or edit table sections.

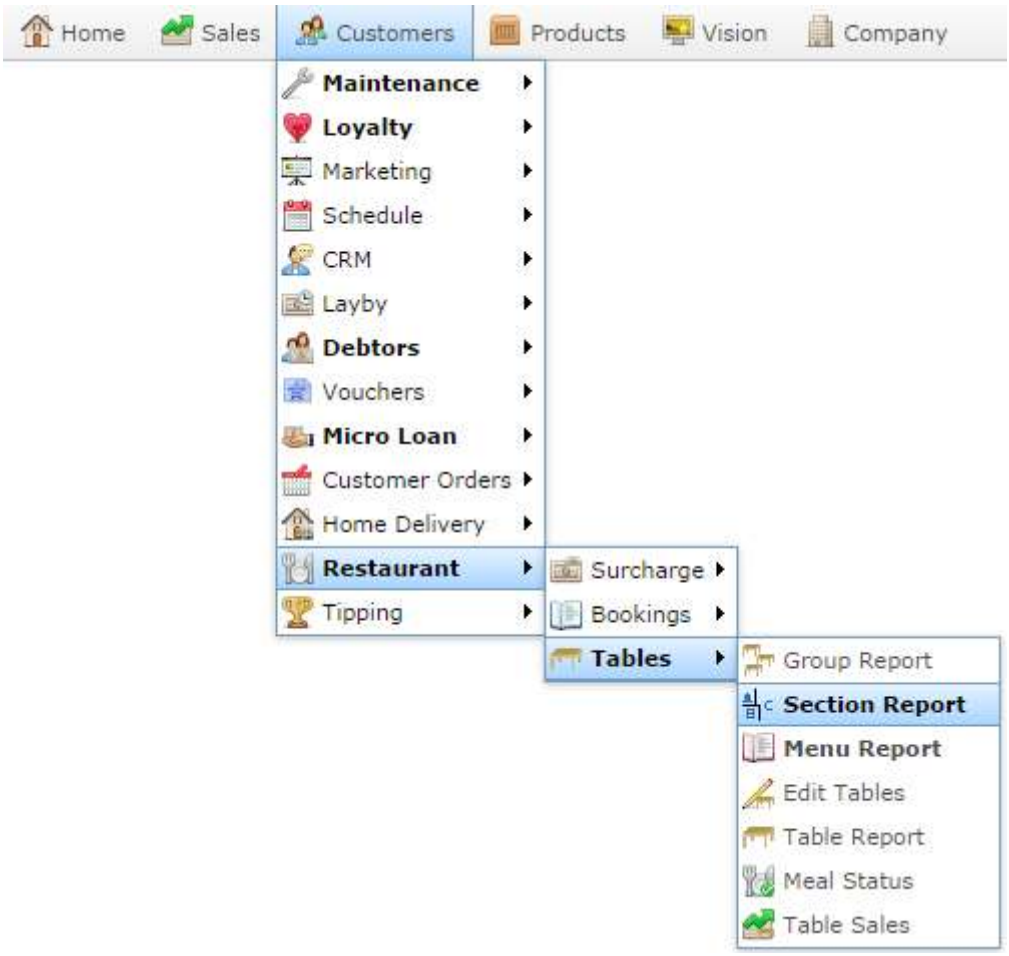
See *Creating a table section* on page 160.

Opening the Table Section Maintenance screen

To open the Table Section Maintenance screen:

1. Press 

in the main menu bar.
2. Press **Restaurant** > **Tables** > **Section Report**.



The Table Section Report screen is displayed.

3. Press the **Description** of the table section you want to view.

The Table Section Maintenance screen is displayed.

Table Section Maintenance screen key fields and buttons

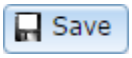
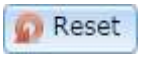
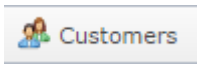
Field	Description
Section	Name of the table section.
Description	Description of the table section.
Enabled	Select **True** to make the table section available for use within the Portal.
Sequence	Type the order the table section should appear on the PDT. Lower numbers are displayed first.
	Return to the Section Report. See *Table Section Report* on page 169.
	Create a new table section. See *Creating a table section* on page 160.
	Delete the table section.
	Save changes to the table section.
	Revert any unsaved changes to the table section.

Table Menu Report

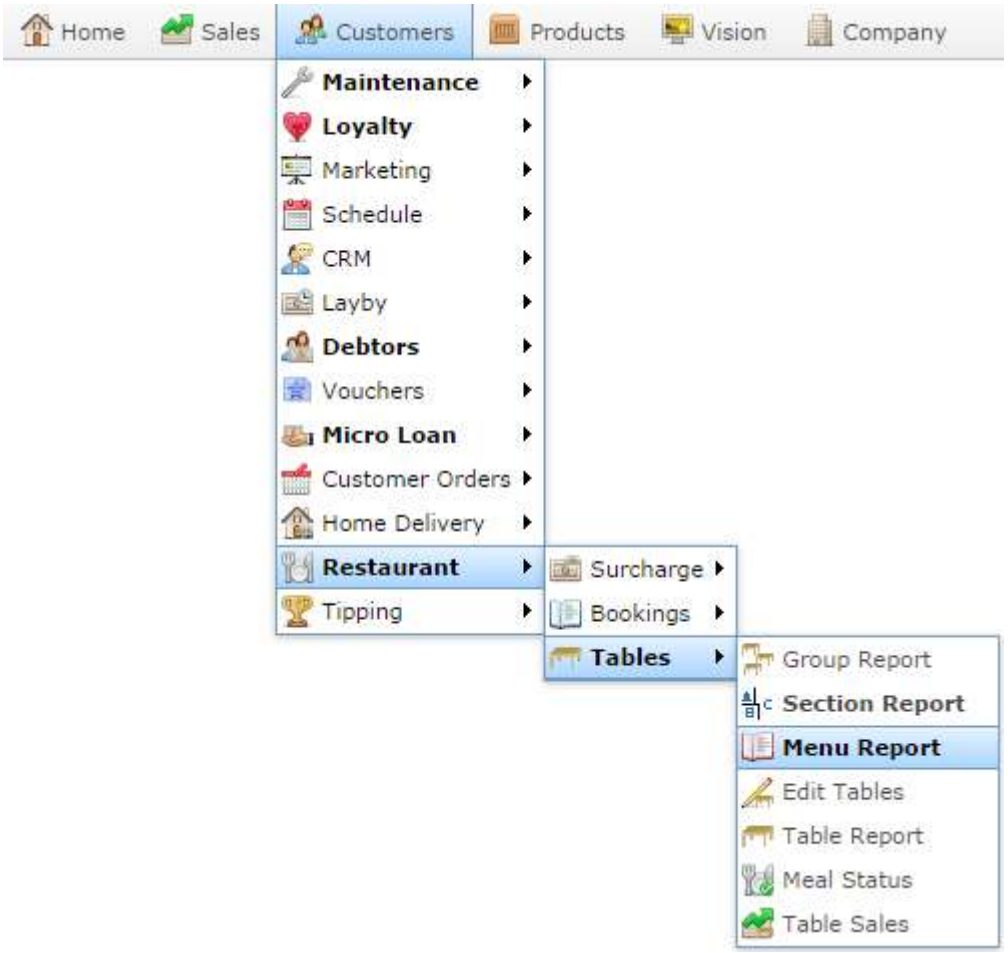
Use the Table Menu Report to view information on menu areas and open the Table Menu Maintenance screen to edit menu areas.

Opening the Table Menu Report

To open the Table Menu Report:

1. Press 

in the main menu bar.
2. Press **Restaurant** > **Tables** > **Menu Report**.



The Table Menu Report is displayed.

Menu	Section	Reference	Modifier Group	Sequence Order	Enabled
Alcoholic drinks	Main	DL	Group 1	5	✓
Deserts	Main	D	Group 1	4	✓
Entrees	Main	E	Group 1	2	✓
Main	Main	M	Group 1	3	✓
Meat cuts	Deli	Meats	Group 1	5	✓
Soft Drinks	Main	DS	Group 1	6	✓
Specials	Main	MOD	Group 1	8	✓
Starters	Main	S	Group 1	1	✓
Tea / Coffee	Main	T	Group 1	7	✓

Table Menu Report key fields and buttons

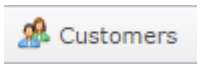
Field	Description
Add to Favourites	Add this report to your Portal favourites.
Create New Menu Type	Create a new menu area. See *Creating a menu area* on page 162.
Menu	Name of the menu area. Press to edit the menu area in the Table Menu Maintenance screen. See *Table Menu Maintenance screen* on page 177.
Section	Table section of the menu area. See *Table Section Maintenance screen* on page 171.
Reference	Short reference generated by the Portal for use on the PDT.
Modifier Group	This field is not in use.
Sequence Order	Number used to control the order the menu area appears in PDTs. Lower numbers appear first.
Enabled	If selected, this menu area is available for use within the Portal.

Table Menu Maintenance screen

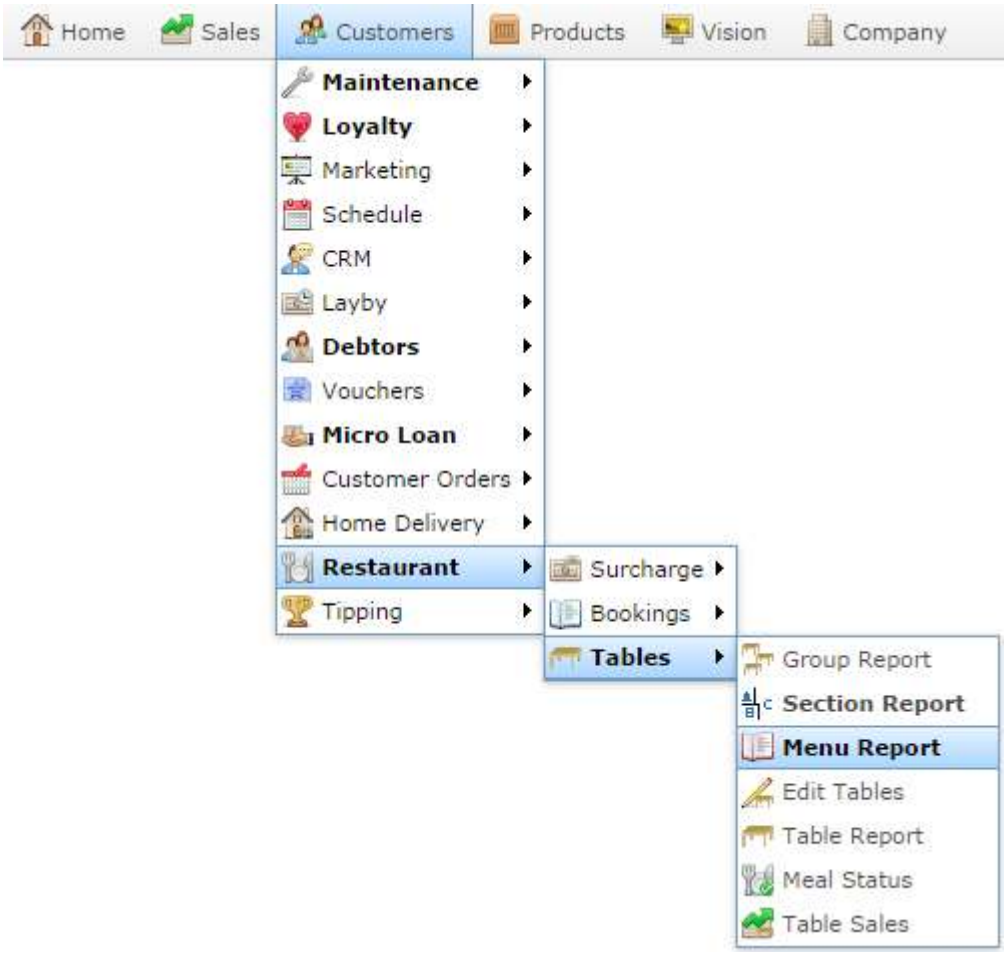
Use the Table Menu Maintenance screen to create and modify menu areas for item modification.

Opening the Table Menu Maintenance screen

To open the Table Menu Maintenance screen:

1. Press 

in the main menu bar.
2. Press **Restaurant** > **Tables** > **Menu Report**.



The Table Menu Report is displayed.

Menu	Section	Reference	Modifier Group	Sequence Order	Enabled
Alcoholic drinks	Main	DL	Group 1	5	✓
Deserts	Main	D	Group 1	4	✓
Entrees	Main	E	Group 1	2	✓
Main	Main	M	Group 1	3	✓
Meat cuts	Deli	Meats	Group 1	5	✓
Soft Drinks	Main	DS	Group 1	6	✓
Specials	Main	MOD	Group 1	8	✓
Starters	Main	S	Group 1	1	✓
Tea / Coffee	Main	T	Group 1	7	✓

3. Press the **Menu** name of the menu area you want to open.

   The Table Menu Maintenance screen is displayed.

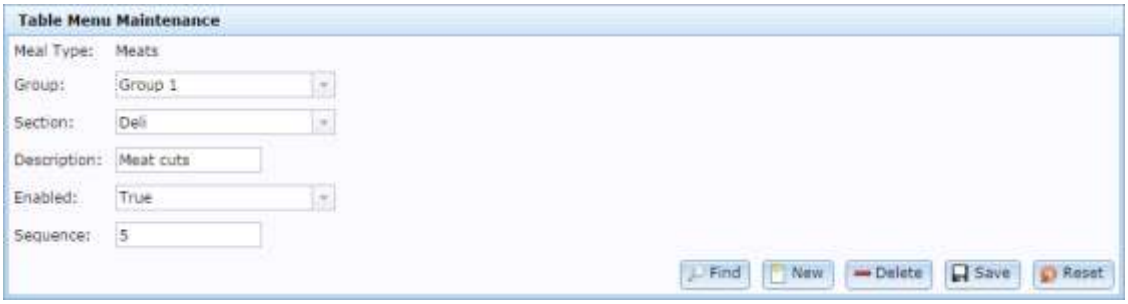
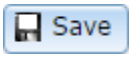
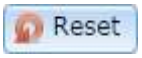


Table Menu Maintenance screen key fields and buttons

Field	Description
Meal Type	The name of the menu area.
Group	This field is not in use.
Section	Select the table section this menu area is available to. This only affects PDTs. See *Table Section Maintenance screen* on page 171.
Description	Type a description of the menu area.
Enabled	Select **True** to make this menu area available for use on the Portal.

Field	Description
Sequence	Type a number to determine the order that this menu item appears on the PDT. Lower numbers appear higher.
	Return to the Table Menu Report. See *Table Menu Report* on page 174.
	Create a new menu area. See *Creating a menu area* on page 162.
	Delete the menu area.
	Save changes to the menu area.
	Revert any unsaved changes to the menu area.

Managing item and PLU groups

You can group items in item groups and PLU groups for reporting purposes. PLU groups can also specify loyalty rewards per site, to give additional loyalty points when customers purchase items from that PLU group. Items can belong to multiple PLU groups and item groups.

Also see:

- *Item Group report* on page 194.
- *Item Group Report Maintenance* on page 191.
- *PLU Group report* on page 210.
- *PLU Group Report Maintenance* on page 207.
- *PLU Group Loyalty report* on page 222.
- *PLU Group Loyalty screen* on page 219.

What you can do:

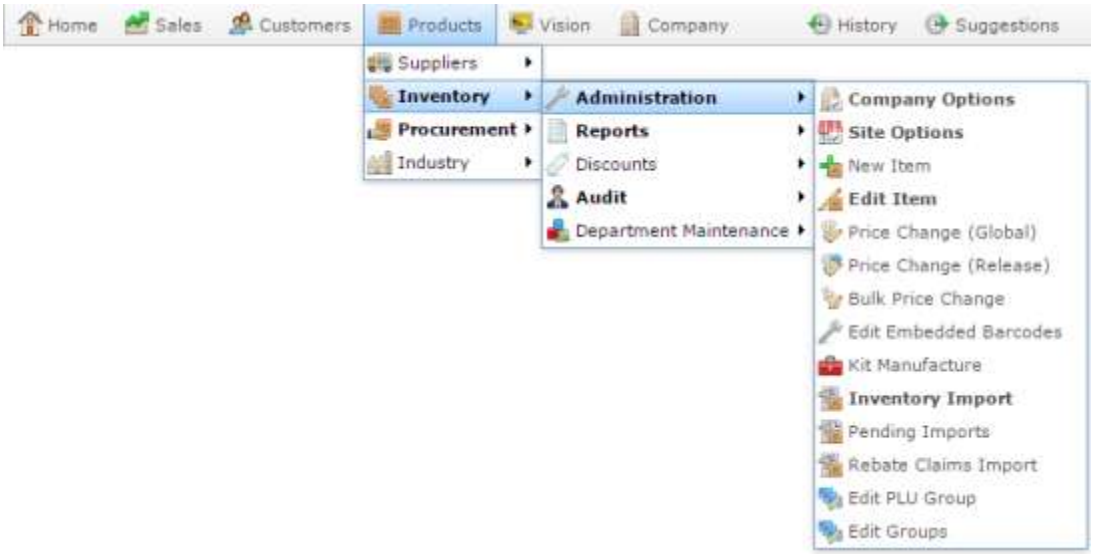
- *Creating an item group* on page 181.
- *Editing an item group* on page 187.
- *Deleting an item group* on page 189.
- *Adding items to an item group* on page 183.
- *Removing items from an item group* on page 185.
- *Creating a PLU group* on page 197.
- *Editing a PLU group* on page 203.
- *Deleting a PLU group* on page 205.
- *Adding items to a PLU group* on page 199.
- *Removing items from a PLU group* on page 201.
- *Adding a loyalty setting to a PLU group* on page 213.
- *Editing a loyalty setting for a PLU group* on page 215.
- *Deleting a loyalty setting for a PLU group* on page 217.

Creating an item group

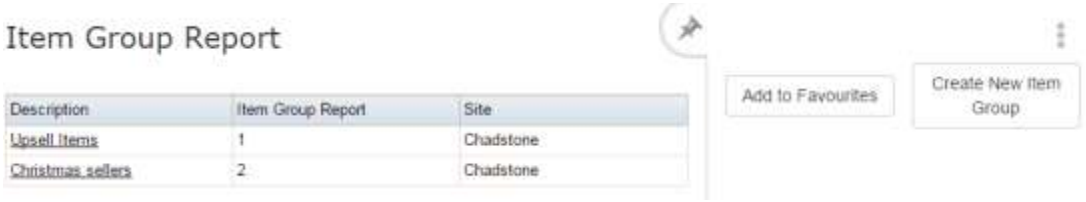
Create an item group to collect items in a particular group for reporting. Items are added to groups separately.

To create an item group:

1. Press Products from the menu bar.
2. Press **Inventory > Administration > Edit Groups**.

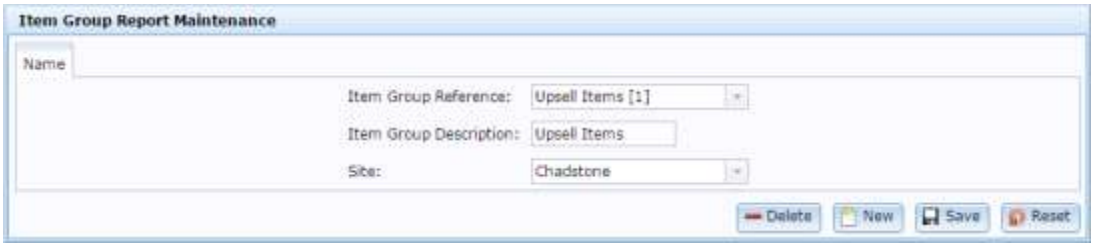


The Item Group report is displayed.

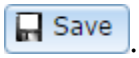


3. Press Create New Item Group.

The Item Group Report Maintenance screen is displayed.



4. Type a unique code to identify the group in the **Item Group Reference** field.

5. Type a description of the group in the **Item Group Description** field.
6. Select the site the group applies to in the **Site** drop-down field.
7. Press 

.

   The group is saved.

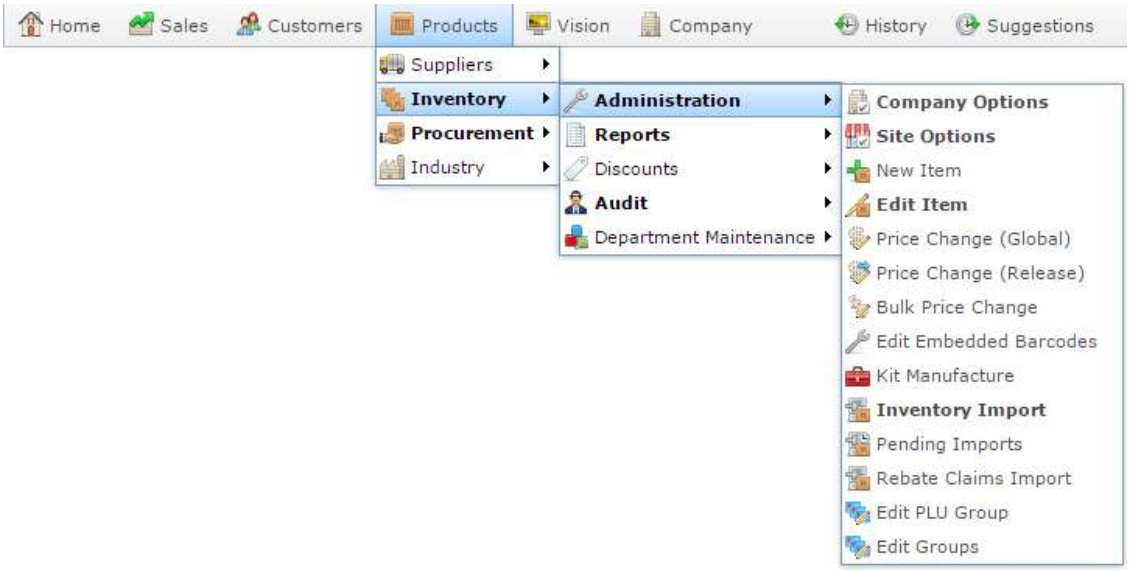
Adding items to an item group

Add items to an item group to collate them for reporting purposes.

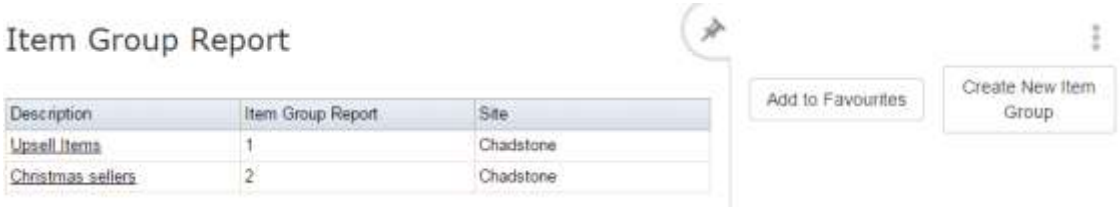
> **Note:** Items can belong to multiple groups at once.

To add items to an item group:

1. Press Products from the menu bar.
2. Press **Inventory > Administration > Edit Groups**.

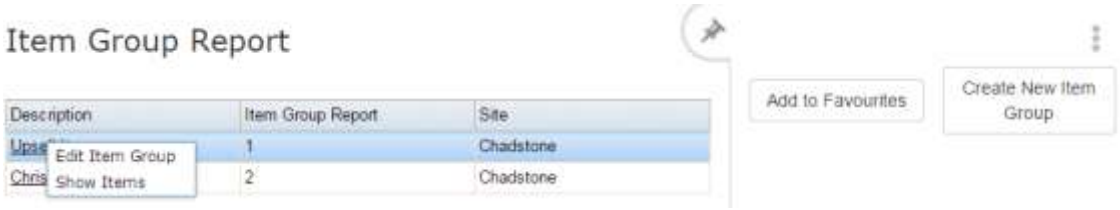


The Item Group report is displayed.



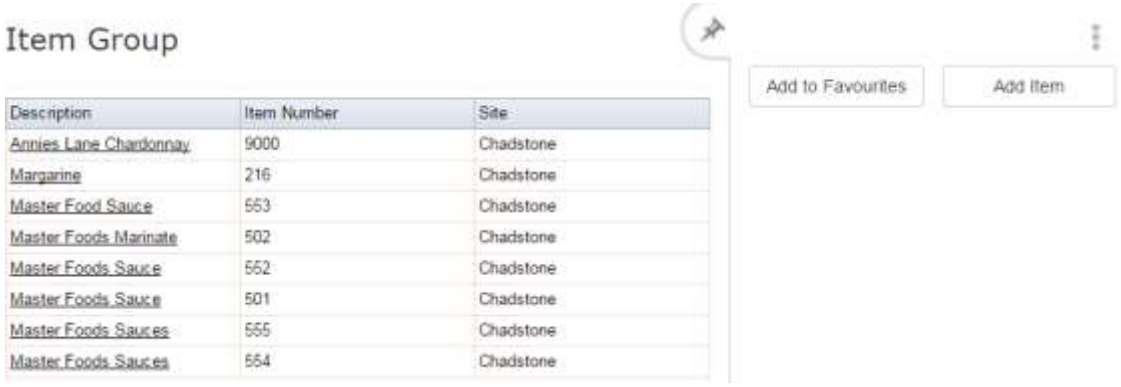
3. Press the **Description** of the group you want to open.

   A popup menu is displayed.

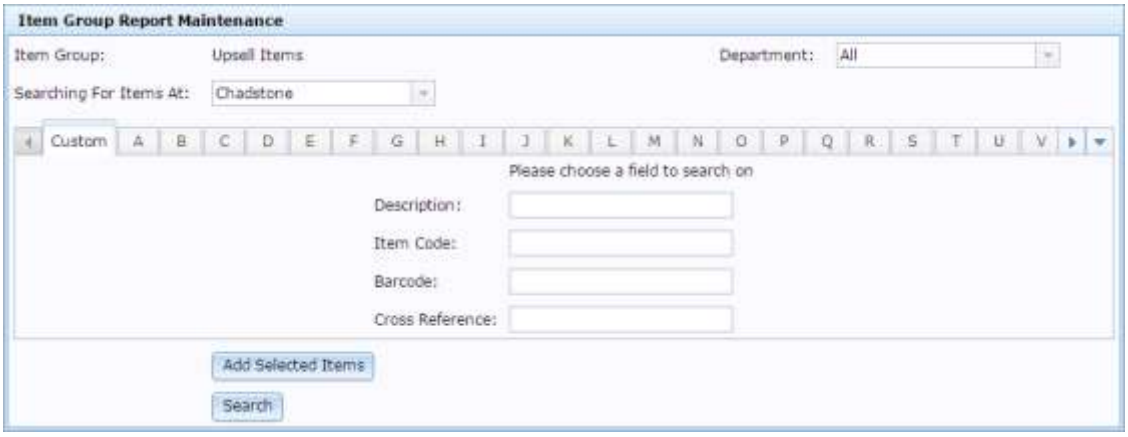


4. Press **Show Items**.

The Item Group report is displayed.



5. Press Add Item.
6. Search for the items you want to add.



See *Finding an item using the search screen* on page 50.

7. Select the items you want to add and press Add Selected Items.

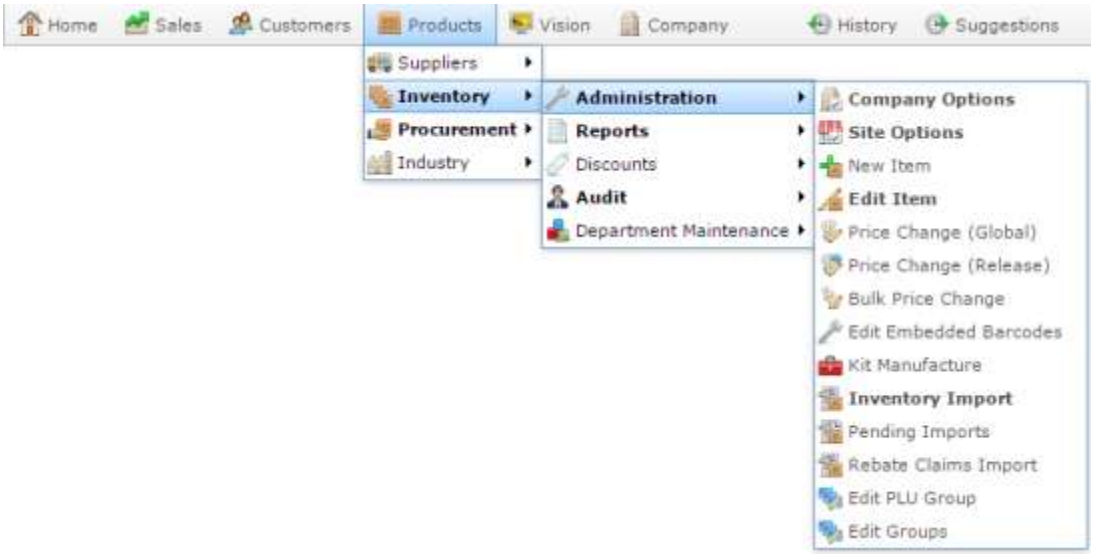
Note: You can select multiple items to add from a single page, but your selections are not stored if you select another search page before adding the items. If you have selected items to add, always press Add Selected Items before you move to another page.

Removing items from an item group

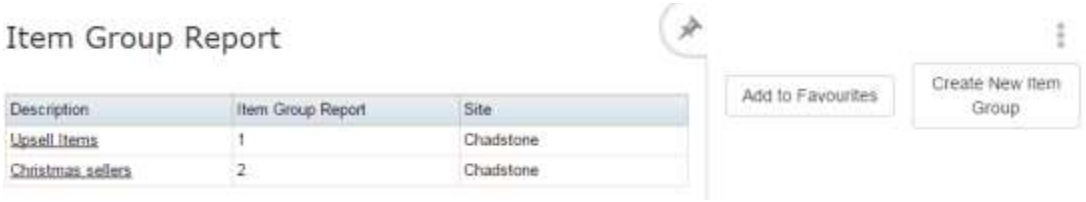
Remove items from an item group if you do not want them to be included in the reports for that group.

To remove items from an item group:

1. Press Products from the menu bar.
2. Press **Inventory > Administration > Edit Groups**.

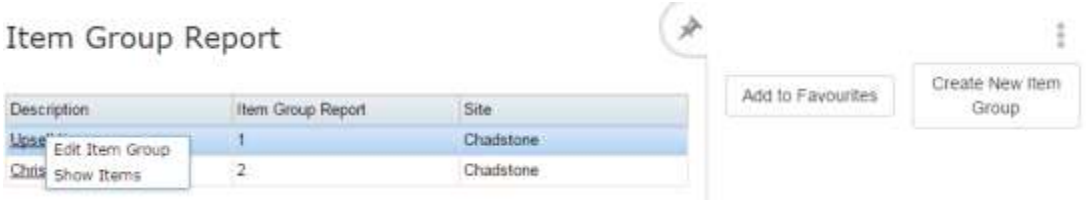


The Item Group report is displayed.



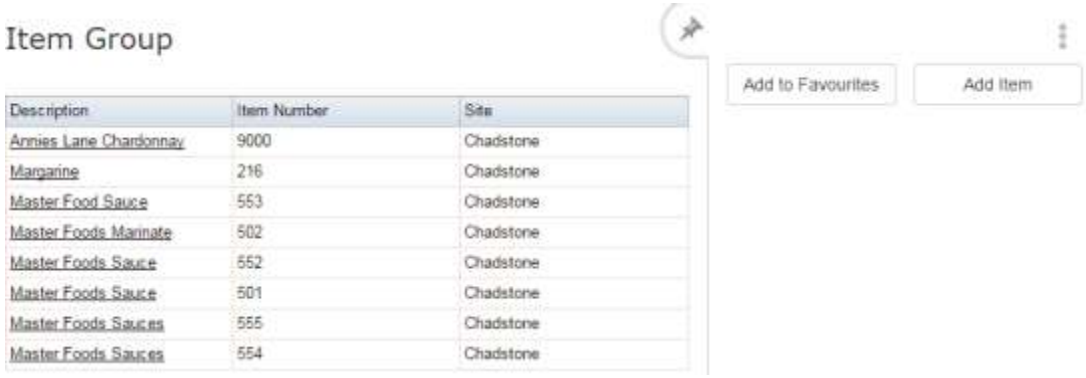
3. Press the **Description** of the group you want to open.

   A popup menu is displayed.



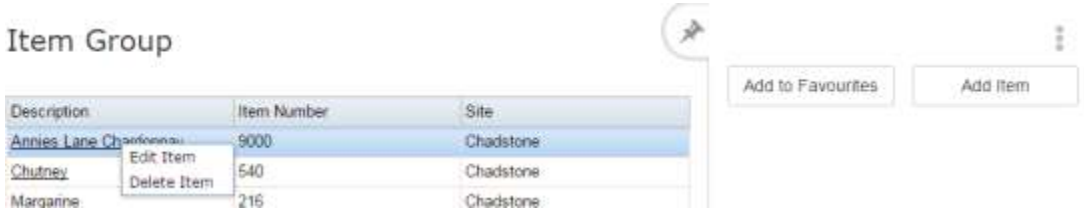
4. Press **Show Items**.

   The Item Group report is displayed.



5. Press the **Description** of the item you want to remove.

   A popup menu is displayed.



6. Press **Delete Item**.

   The item is removed from the group.

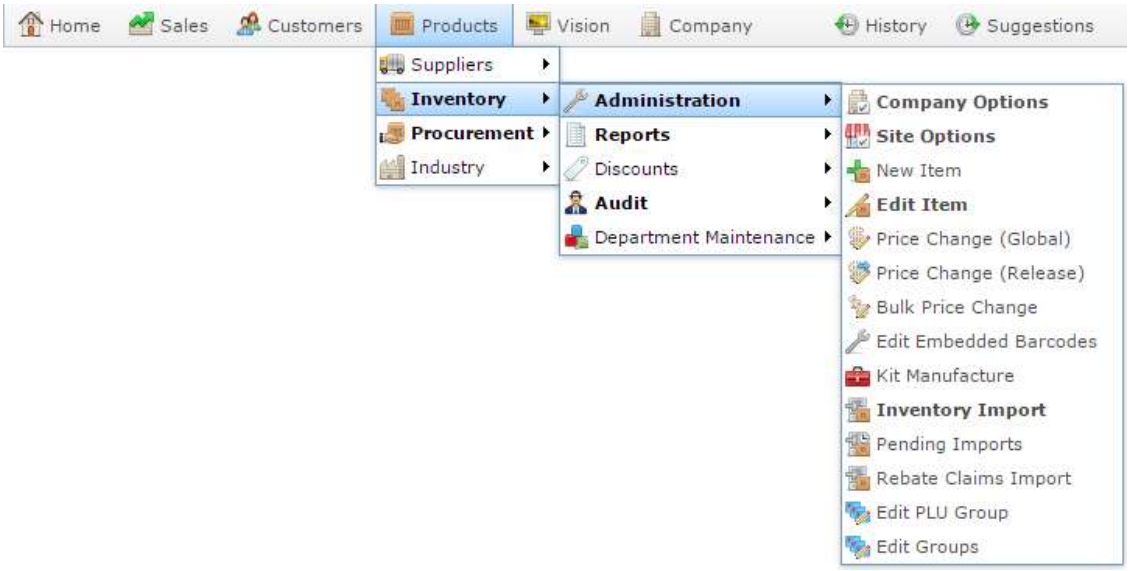
Editing an item group

Edit an item group if you want to change its description or which site it applies to.

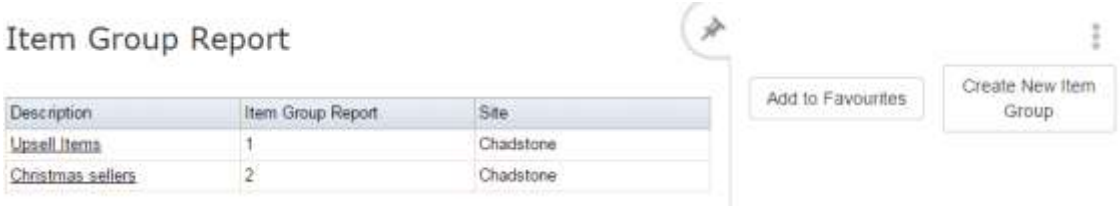
> **Note:** You cannot add items to a group by editing it. See *Adding items to an item group* on page 183.

To edit an item group:

1. Press Products from the menu bar.
2. Press **Inventory > Administration > Edit Groups**.



The Item Group report is displayed.

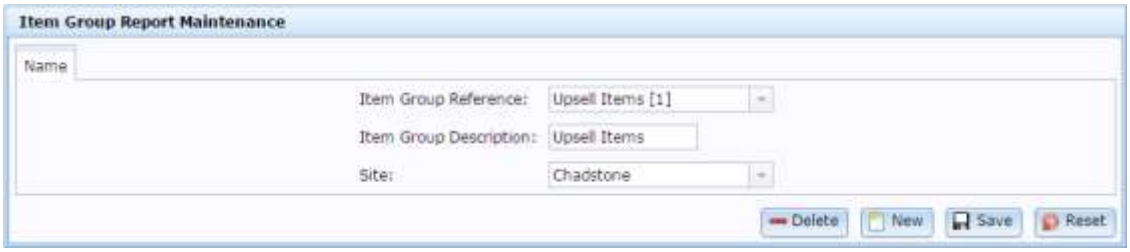


3. Press the **Description** of the group you want to open.

   A popup menu is displayed.

4. Press **Edit Item Group**.

   The Item Group Report Maintenance screen is displayed.



5. Edit the fields as required.

   See *Item Group Report Maintenance* on page 191.

6. Press Save.

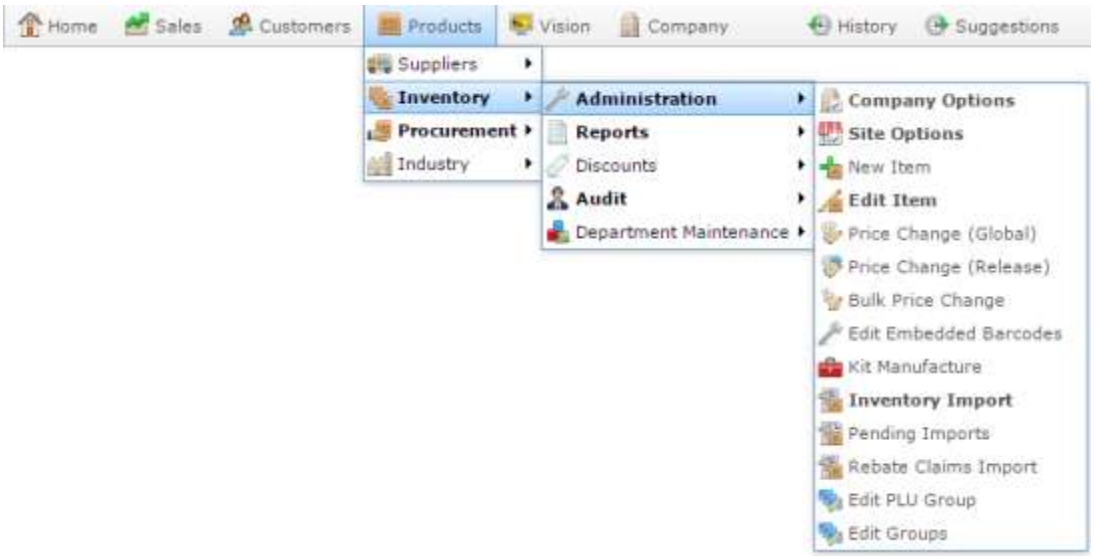
   The item group is saved.

Deleting an item group

Delete an item group if you want to remove it from the Portal.

To delete an item group:

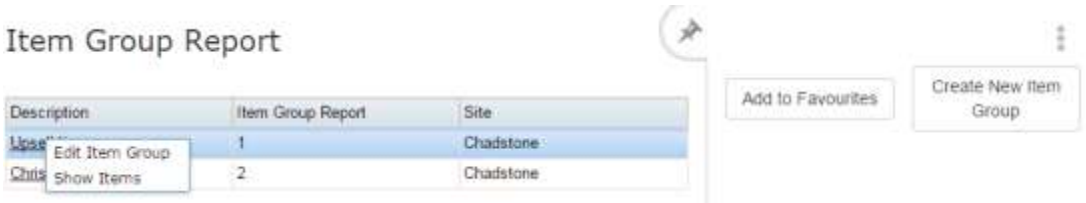
1. Press Products from the menu bar.
2. Press **Inventory > Administration > Edit Groups**.



The Item Group report is displayed.

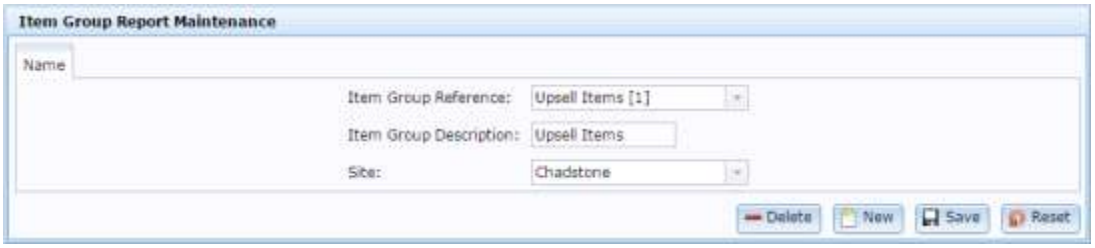
3. Press the **Description** of the group you want to open.

   A popup menu is displayed.



4. Press **Edit Item Group**.

   The Item Group Report Maintenance screen is displayed.



5. Press Delete.

   The item group is delete.

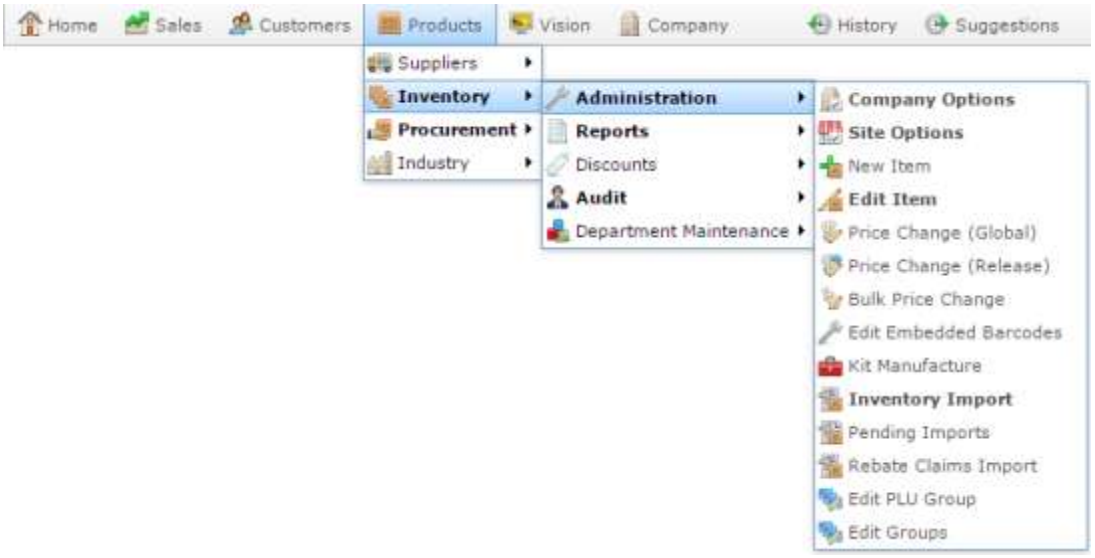
Item Group Report Maintenance

Use the Item Group Report Maintenance screen to create, edit and delete item groups for sites.

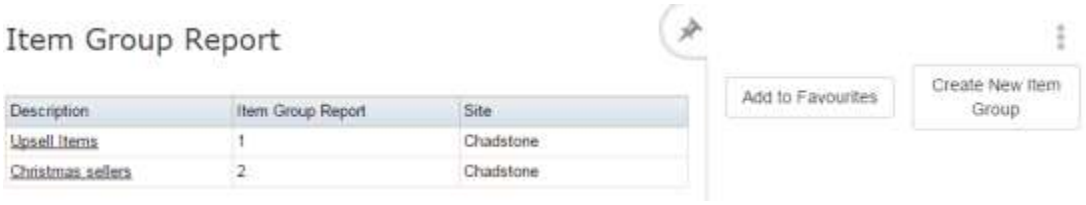
Opening the Item Group Report Maintenance screen

To open the Item Group Report Maintenance screen:

1. Press Products from the menu bar.
2. Press **Inventory > Administration > Edit Groups**.

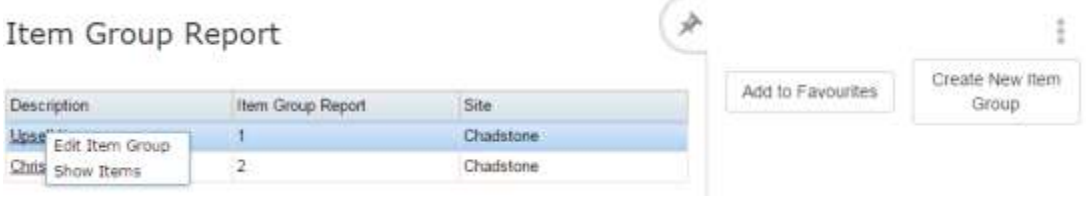


The Item Group report is displayed.



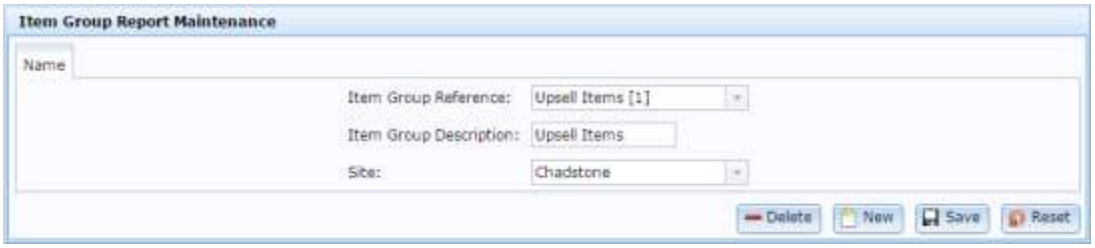
3. Press the **Description** of the group you want to open.

   A popup menu is displayed.

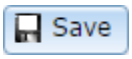
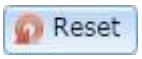


4. Press **Edit Item Group**.

   The Item Group Report Maintenance screen is displayed.


Item Group Report Maintenance
Name
Item Group Reference:
Upsell Items [1]
Item Group Description:
Upsell Items
Site:
Chadstone
Delete
New
Save
Reset

Item Group Report Maintenance screen key fields and buttons

Field	Description
Item Group Reference	Unique code identifying the item group.
Item Group Description	Description of the item group.
Site	Site the item group applies to.
	Delete this item group.
	Create a new item group.
	Save any changes made to this item group.
	Undo any changes made to this item group since it was last saved.

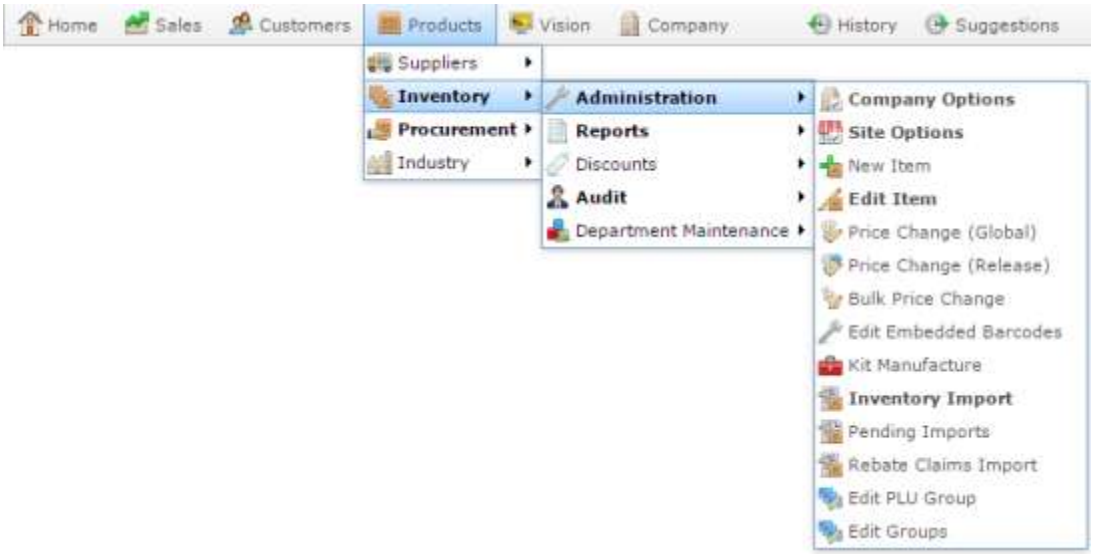
Item Group report

Use the Item Group report to view item groups you have defined for a site.

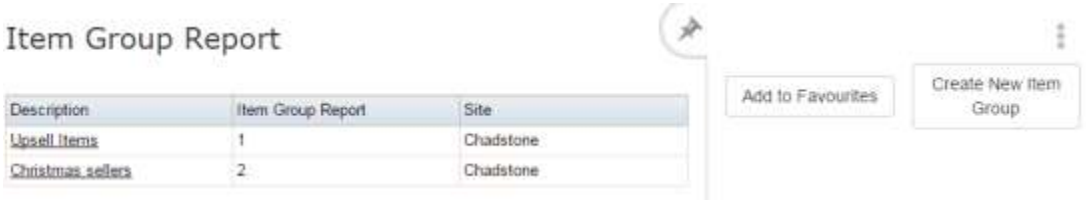
Opening the Item Group report

To open the Item Group report:

1. Press Products from the menu bar.
2. Press **Inventory > Administration > Edit Groups**.



The Item Group report is displayed.



Item Group report key fields

Filters area

Use this area to filter the results shown in the report.

Field	Description
	Press to add this report to your Portal favourites for easier access.
	Press to create a new item group.

Report area

This area displays report information.

Note: Not all fields may be displayed at once. Some fields depend on your filter field selections.

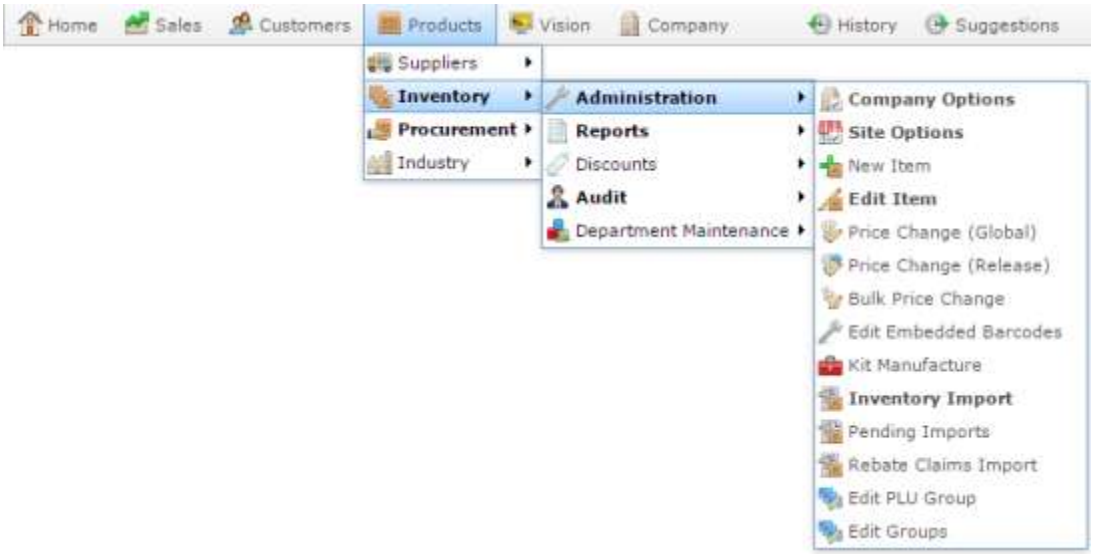
Field	Description
Description	Description of the item group.
Item Group Report	Unique code identifying the item group.
Site	Site the item group belongs to.

Creating a PLU group

Create a PLU group to collect items in a price look up (PLU) group for reporting. Items are added to PLU groups separately.

To create a PLU group:

1. Press Products from the menu bar.
2. Press **Inventory > Administration > Edit PLU Group**.

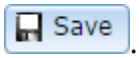


The PLU Group report is displayed.

3. Press Create New PLU Group.

The PLU Group Report Maintenance screen is displayed.

4. Type a unique code to identify the group in the **Item Group Reference** field.
5. Type a description of the group in the **Item Group Description** field.

6. Press 

.

   The group is saved.

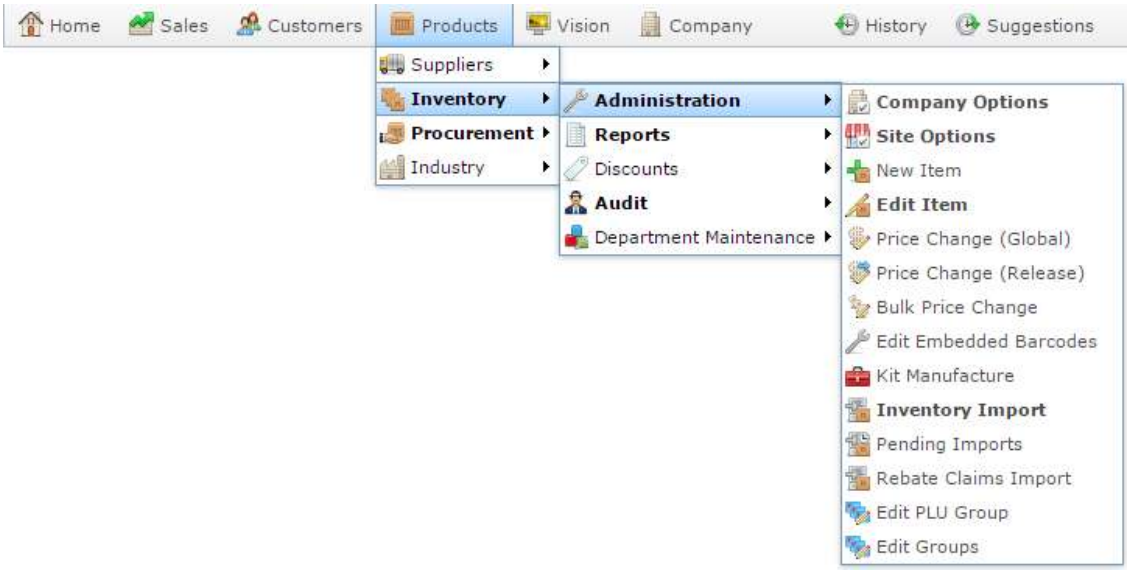
Adding items to a PLU group

Add items to a PLU group to collate them for reporting purposes.

> **Note:** Items can belong to multiple groups at once.

To add items to a PLU group:

1. Press Products from the menu bar.
2. Press **Inventory > Administration > Edit PLU Group**.



The PLU group report is displayed.

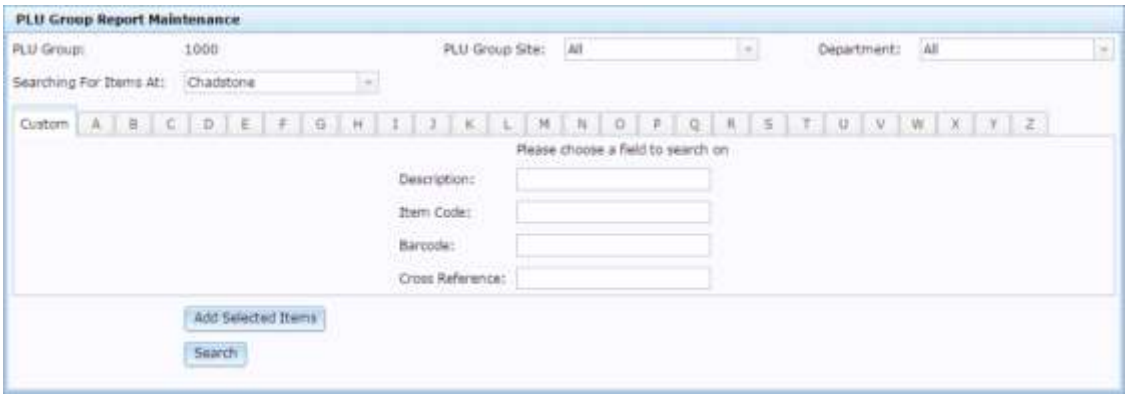
3. Press the **Description** of the group you want to open.

   A popup menu is displayed.

4. Press **Show Items**.

The PLU group report is displayed.

5. Press Add Item.
6. Search for the items you want to add.



See *Finding an item using the search screen* on page 50.

7. Select the items you want to add and press Add Selected Items.

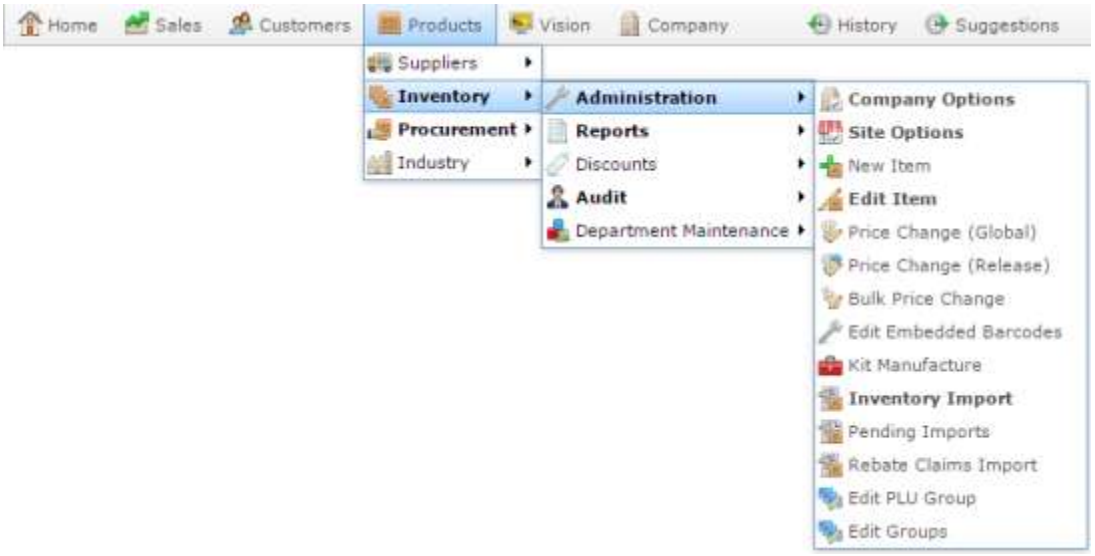
Note: You can select multiple items to add from a single page, but your selections are not stored if you select another search page before adding the items. If you have selected items to add, always press Add Selected Items before you move to another page.

Removing items from a PLU group

Remove items from a PLU group if you do not want them included in the price lookup (PLU) group.

To remove items from a PLU group:

1. Press Products from the menu bar.
2. Press **Inventory > Administration > Edit PLU Group**.



The PLU group report is displayed.

3. Press the **Description** of the group you want to open.

   A popup menu is displayed.

4. Press **Show Items**.

   The PLU group report is displayed.

5. Press the **Description** of the item you want to remove.

   A popup menu is displayed.

6. Press **Delete Item**.

   The item is removed from the group.

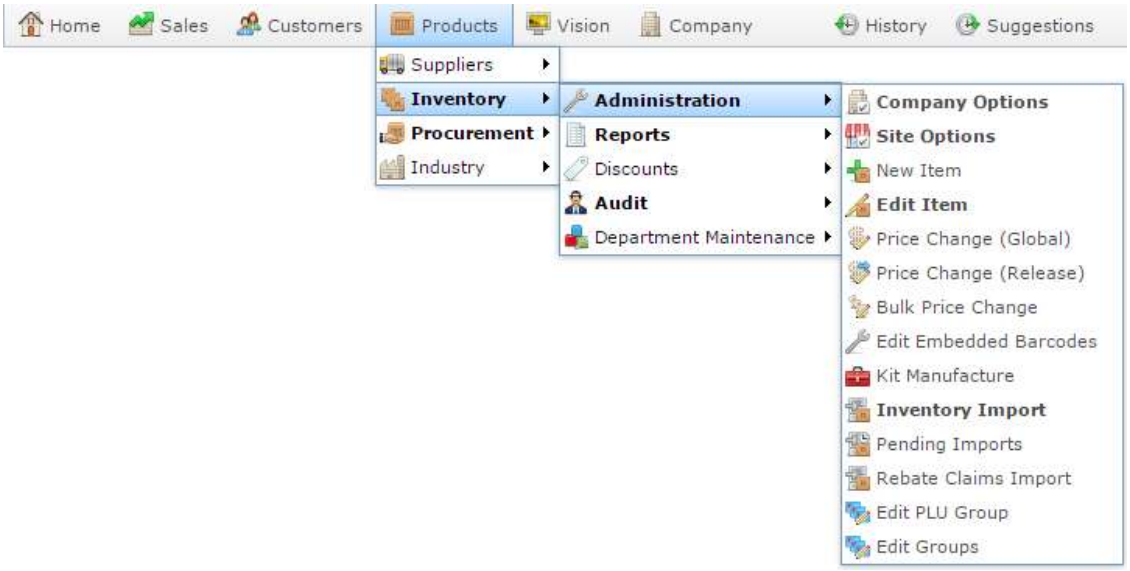
Editing a PLU group

Edit a PLU group if you want to change its description.

> **Note:** You cannot add items to a group by editing it. See *Adding items to a PLU group* on page 199.

To edit a PLU group:

1. Press Products from the menu bar.
2. Press **Inventory > Administration > Edit PLU Group**.



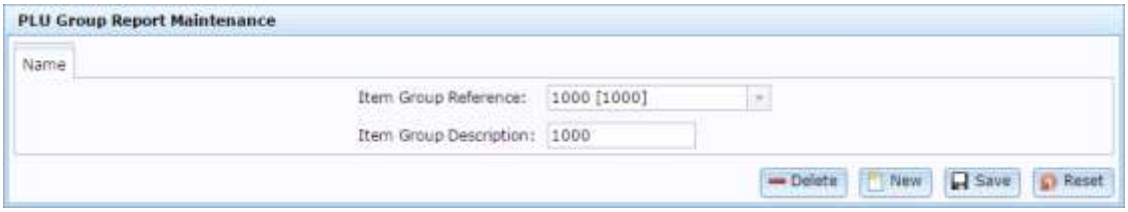
The PLU Group report is displayed.

3. Press the **Description** of the group you want to open.

   A popup menu is displayed.

4. Press **Edit PLU Group**.

The PLU Group Report Maintenance screen is displayed.



5. Edit the fields as required.

   See *PLU Group Report Maintenance* on page 207.

6. Press Save.

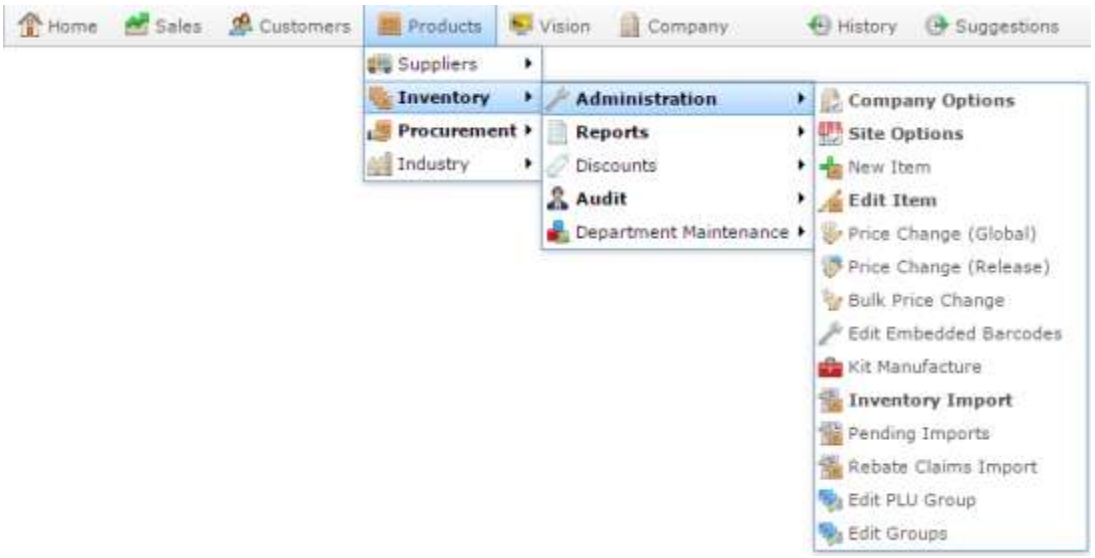
   The PLU group is saved.

Deleting a PLU group

Delete a PLU group if you want to remove it from the Portal.

To delete a PLU group:

1. Press Products from the menu bar.
2. Press **Inventory > Administration > Edit PLU Group**.



The PLU Group report is displayed.

3. Press the **Description** of the group you want to open.

   A popup menu is displayed.

4. Press **Edit PLU Group**.

   The PLU Group Report Maintenance screen is displayed.

5. Press Delete.

   The PLU group is deleted.

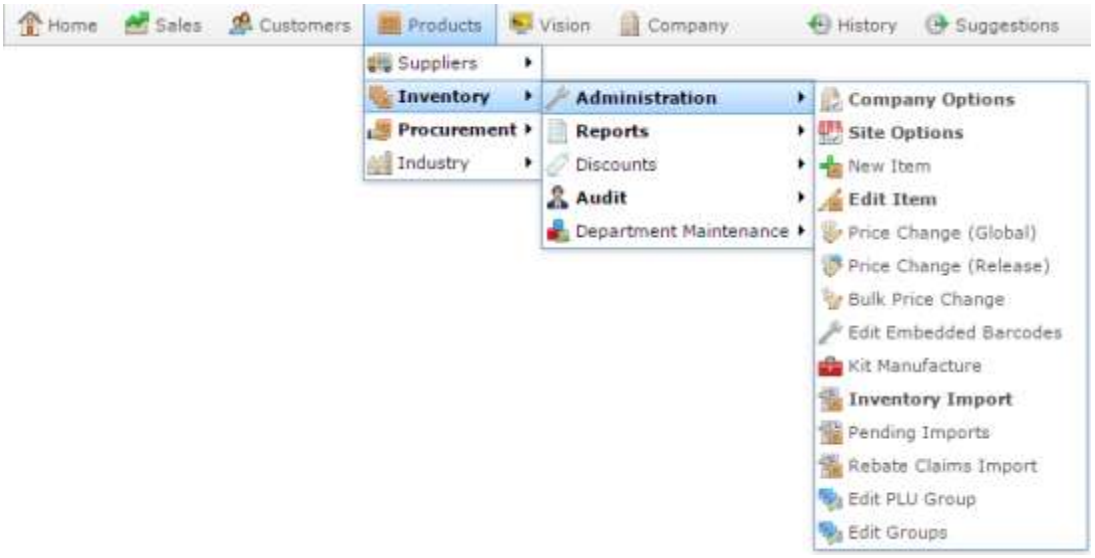
PLU Group Report Maintenance

Use the PLU Group Report Maintenance screen to create, edit and delete price look up (PLU) groups for your company.

Opening the PLU Group Report Maintenance screen

To open the PLU Group Report Maintenance screen:

1. Press Products from the menu bar.
2. Press **Inventory > Administration > Edit PLU Group**.



The PLU Group report is displayed.

3. Press the **Description** of the group you want to open.

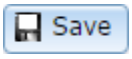
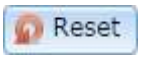
   A popup menu is displayed.

4. Press **Edit PLU Group**.

   The PLU Group Report Maintenance screen is displayed.

PLU Group Report Maintenance
Name
Item Group Reference:
1000 [1000]
Item Group Description:
1000
Delete
New
Save
Reset

PLU Group Report Maintenance screen key fields and buttons

Field	Description
Item Group Reference	Unique code identifying the PLU group.
Item Group Description	Description of the PLU group.
	Delete this PLU group.
	Create a new PLU group.
	Save any changes made to this PLU group.
	Undo any changes made to this PLU group since it was last saved.

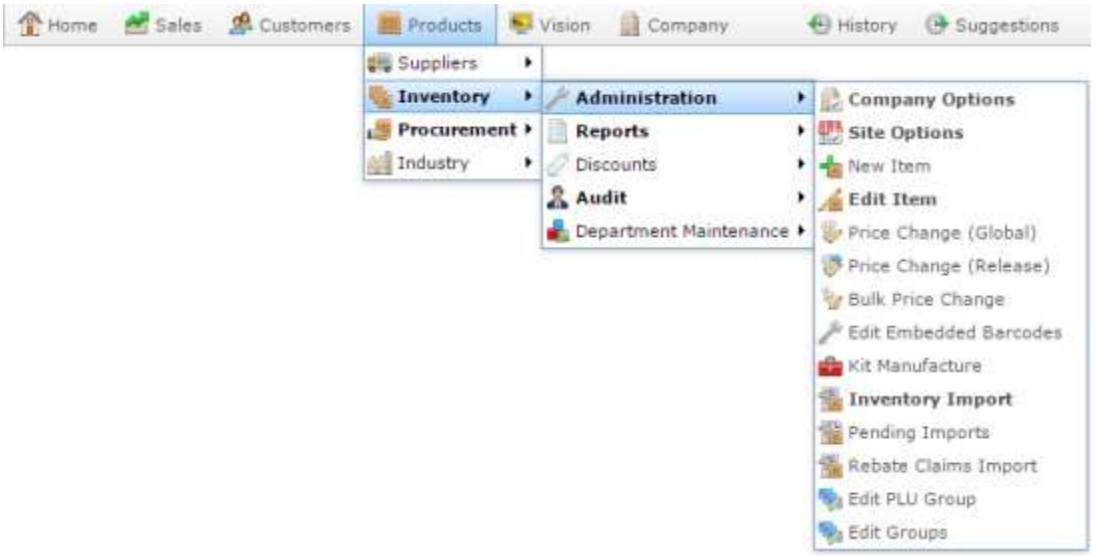
PLU Group report

Use the PLU Group report to view price look up (PLU) groups you have defined for your company.

Opening the PLU Group report

To open the PLU Group report:

1. Press Products from the menu bar.
2. Press **Inventory > Administration > Edit PLU Group**.



The PLU Group report is displayed.

PLU Group report key fields

Filters area

Use this area to filter the results shown in the report.

Field	Description
	Press to add this report to your Portal favourites for easier access.
	Press to create a new PLU group.

Report area

This area displays report information.

Note: Not all fields may be displayed at once. Some fields depend on your filter field selections.

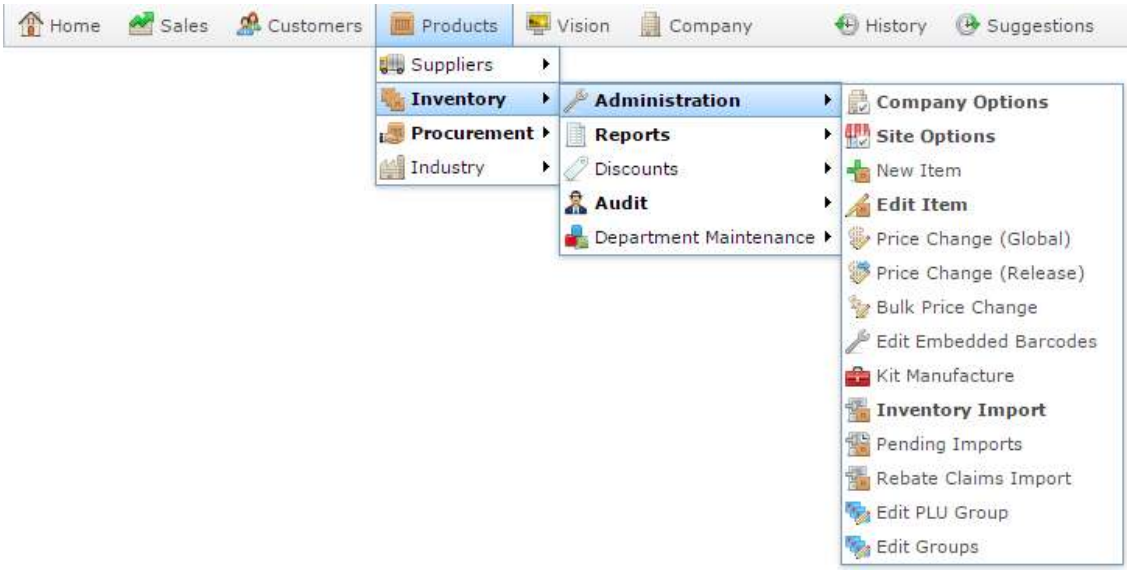
Field	Description
Description	Description of the Price Look Up (PLU) group.
PLU Group	Code for the PLU group.

Adding a loyalty setting to a PLU group

Add a loyalty setting to a PLU group to provide special loyalty points rewards for loyalty customers who purchase items from that group.

To add a loyalty setting to a PLU group

1. Press Products from the menu bar.
2. Press **Inventory > Administration > Edit PLU Group**.



The PLU Group report is displayed.

3. Press the **Description** of the group you want to open.

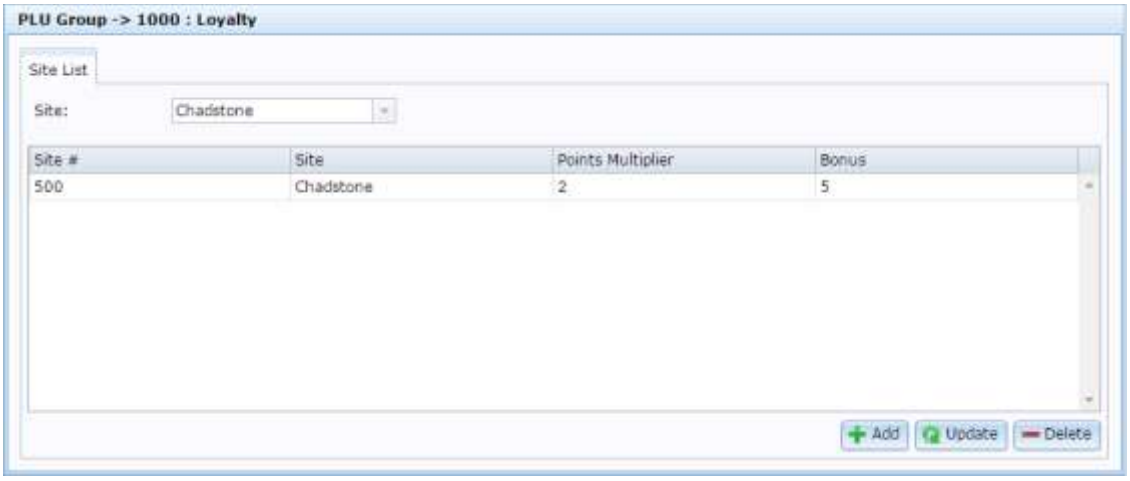
   A popup menu is displayed.

4. Press **Show Loyalty Settings**.

   The PLU Group Loyalty Report Maintenance screen is displayed.

5. Press Edit Site.

   The PLU Group Loyalty screen is displayed.



6. Select the site you want to add a loyalty setting for in the **Site** drop-down field.
7. Press Add.

   The site is added to the PLU group's loyalty settings.

8. Edit the **Points Multiplier** and **Bonus** fields for the site.

   See *PLU Group Loyalty screen* on page 219.

9. Press Update.

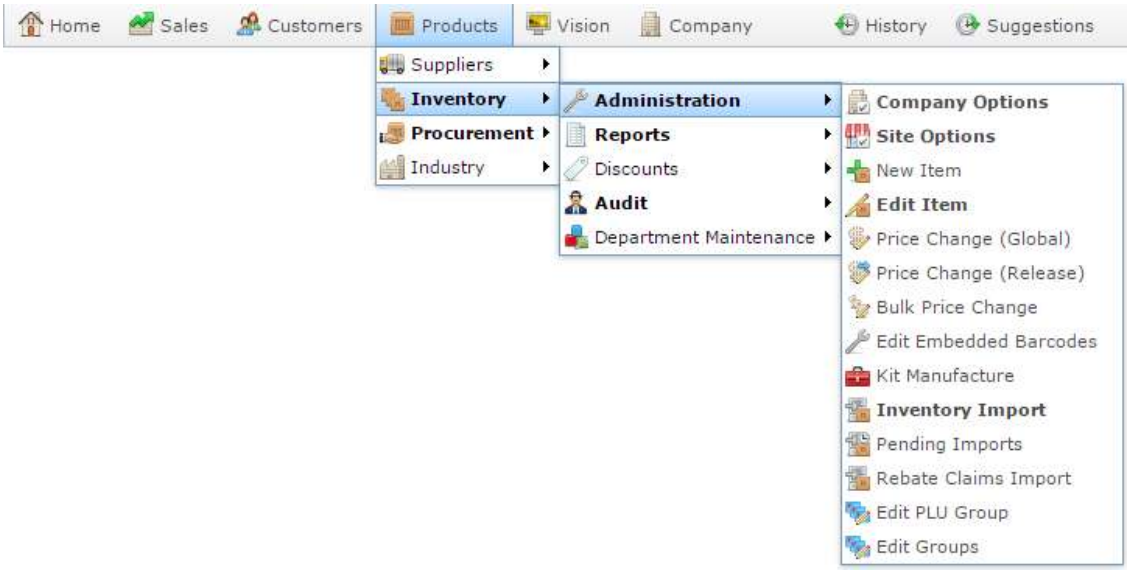
   The new settings are saved.

Editing a loyalty setting for a PLU group

Edit a site's loyalty settings when you want to change the loyalty multiplier or bonus for items in this PLU group.

To edit the loyalty settings of a site:

1. Press Products from the menu bar.
2. Press **Inventory > Administration > Edit PLU Group**.



The PLU Group report is displayed.

3. Press the **Description** of the group you want to open.

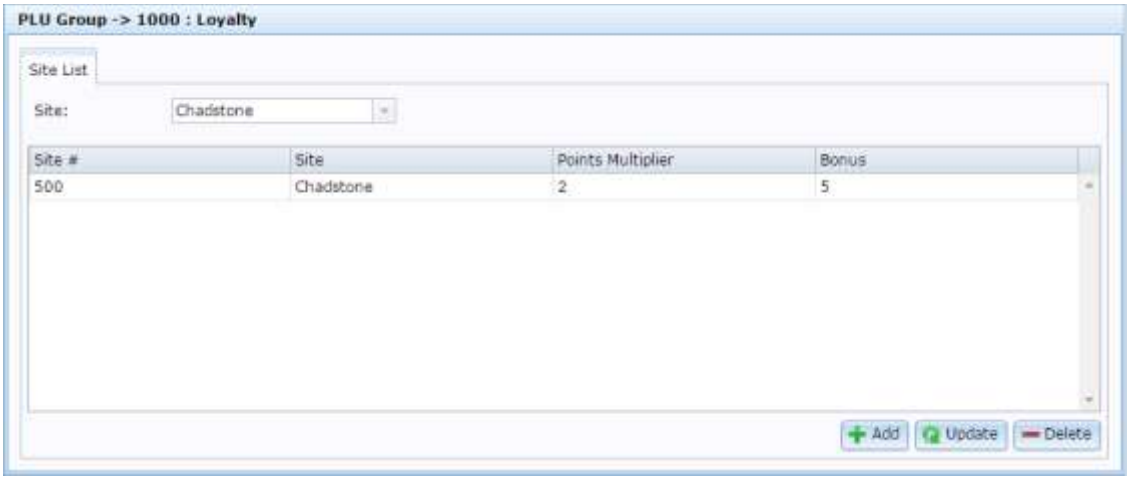
   A popup menu is displayed.

4. Press **Show Loyalty Settings**.

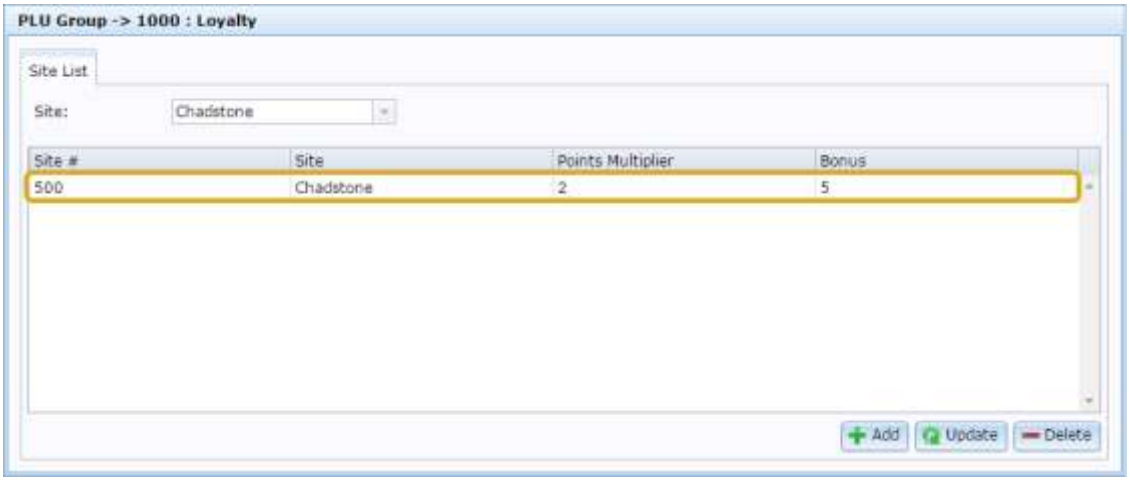
   The PLU Group Loyalty Report Maintenance screen is displayed.

5. Press Edit Site.

   The PLU Group Loyalty screen is displayed.



6. Select the site you want to edit in the grid.



7. Edit the **Points Multiplier** and **Bonus** fields for the site.

   See *PLU Group Loyalty screen* on page 219.

8. Press Update.

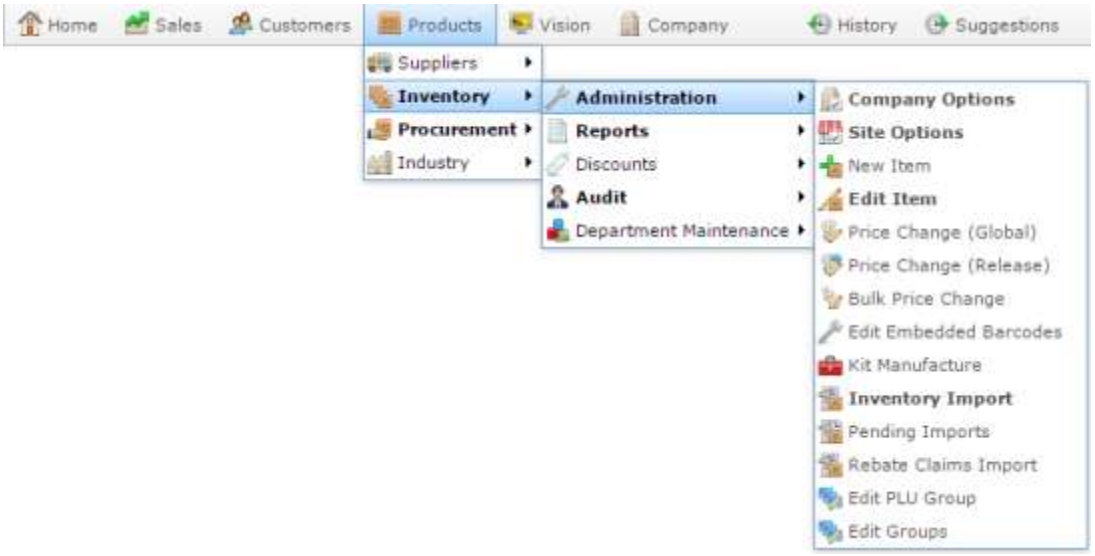
   The settings are saved.

Deleting a loyalty setting for a PLU group

Delete a site's loyalty settings if you don't want to provide a loyalty multiplier or bonus for items in this PLU group.

To delete the loyalty settings of a site:

1. Press Products from the menu bar.
2. Press **Inventory > Administration > Edit PLU Group**.



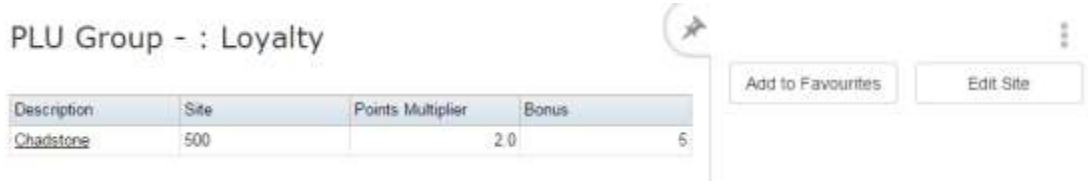
The PLU Group report is displayed.

3. Press the **Description** of the group you want to open.

   A popup menu is displayed.

4. Press **Show Loyalty Settings**.

   The PLU Group Loyalty Report Maintenance screen is displayed.



5. Press the **Description** of the site you want to delete.

   A popup menu is displayed.

6. Press **Delete Site**.

   The site's settings are deleted.

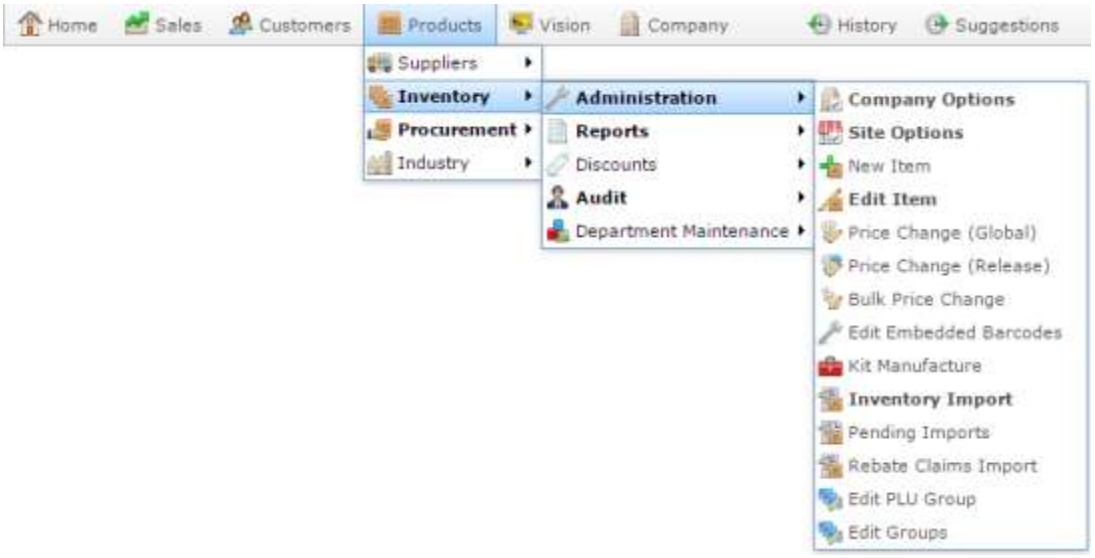
PLU Group Loyalty screen

Use the PLU Group Loyalty screen to add, edit and remove loyalty multipliers and bonuses that a site applies to items in a price look up (PLU) group.

Opening the PLU Group Loyalty screen

To open the PLU Group Loyalty screen:

1. Press Products from the menu bar.
2. Press **Inventory > Administration > Edit PLU Group**.



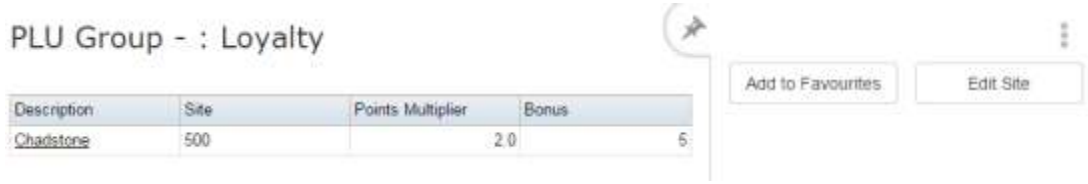
The PLU Group report is displayed.

3. Press the **Description** of the group you want to open.

   A popup menu is displayed.

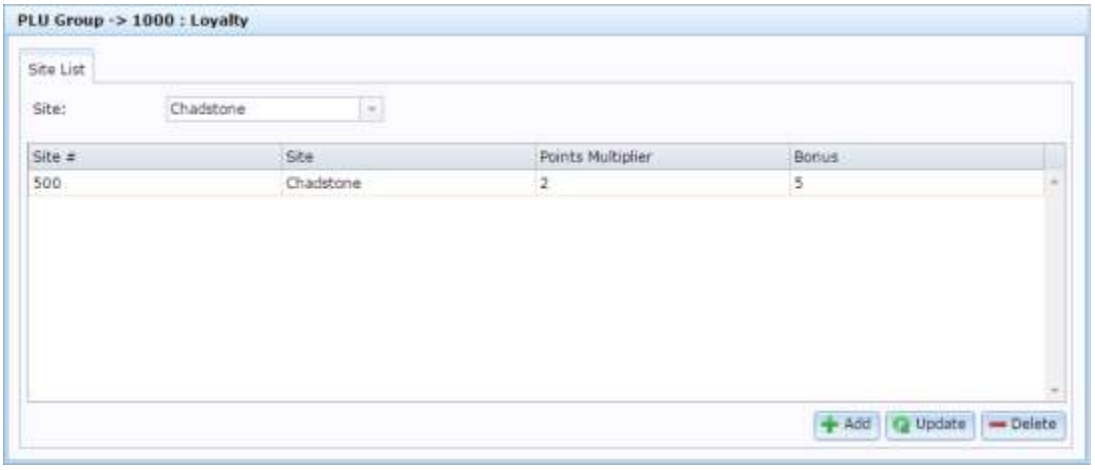
4. Press **Show Loyalty Settings**.

   The PLU Group Loyalty Report Maintenance screen is displayed.



5. Press Edit Site.

   The PLU Group Loyalty screen is displayed.



PLU Group Loyalty screen key fields and buttons

Field	Description
Site	Select the site to add settings for.
Add	Add settings for the site selected in the **Site** field.
Update	Save any changes made to the existing settings.
Delete	Delete the selected site settings for this PLU group.

Site grid

Use this area to maintain the loyalty rewards this PLU group offers for each site.

Field	Description
Site #	The unique code identifying the site.
Site	The description of the site.
Points Multiplier	Type the points multiplier for this PLU group. All points earned by items in this PLU group are multiplied by this number when being added to the loyalty member's loyalty points balance.
Bonus	Type the bonus points applied for purchasing an item in this PLU group. Any item purchased in this group adds this bonus to the loyalty member's loyalty points balance. **Note:** The bonus is only added once per group in a transaction, no matter how many units of the item are purchased.

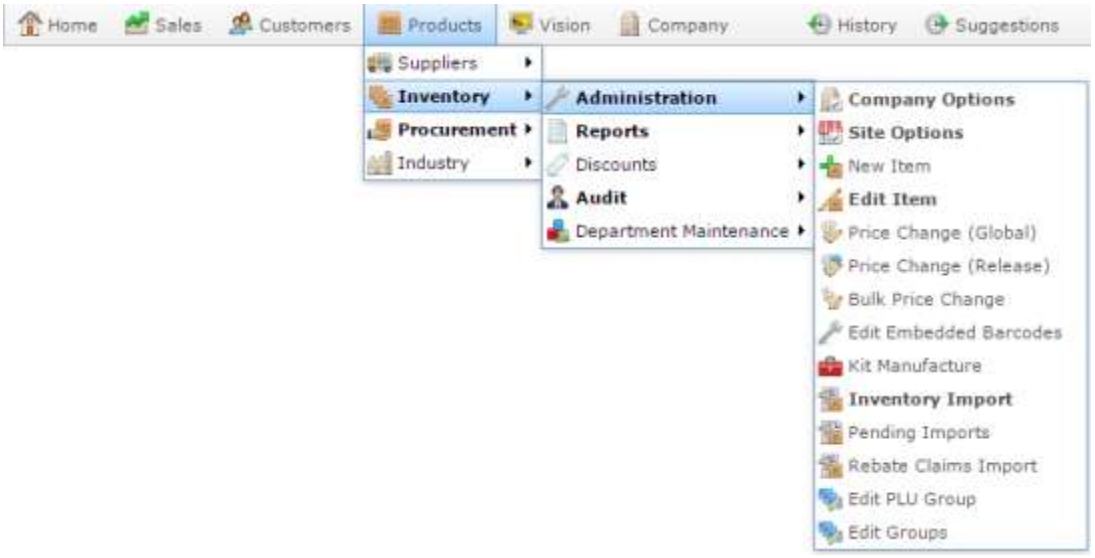
PLU Group Loyalty report

Use the PLU Group Loyalty report to view a price look up (PLU) group's loyalty rewards for different sites.

Opening the PLU Group Loyalty report

To open the PLU Group Loyalty report:

1. Press Products from the menu bar.
2. Press **Inventory > Administration > Edit PLU Group**.



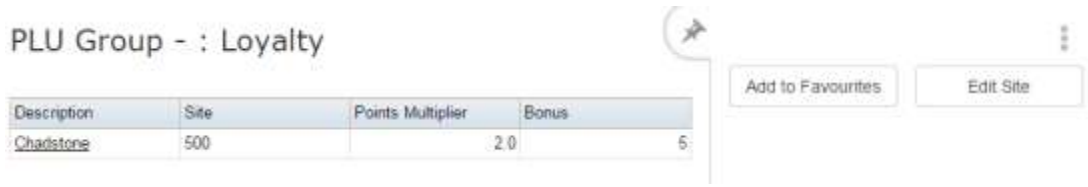
   The PLU Group report is displayed.

3. Press the **Description** of the group you want to open.

   A popup menu is displayed.

4. Press **Show Loyalty Settings**.

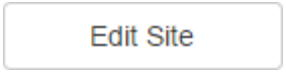
   The PLU Group Loyalty Report Maintenance screen is displayed.


PLU Group - : Loyalty
Add to Favourites
Edit Site
Description
Site
Points Multiplier
Bonus
Chadstone
500
2.0
5

PLU Group Loyalty report key fields

Filters area

Use this area to filter the results shown in the report.

Field	Description
	Press to add this report to your Portal favourites for easier access.
	Press to open the site loyalty settings for this PLU group.

Report area

This area displays report information.

Note: Not all fields may be displayed at once. Some fields depend on your filter field selections.

Field	Description
Site / Description	The name of the relevant site.
Site # / Site	The site code of the relevant site.
Points Multiplier	The points multiplier the site allows for this PLU group. All points earned by items in this PLU group are multiplied by this number when being added to the loyalty member's loyalty points balance.
Bonus	The bonus points applied for purchasing an item in this PLU group. Each item purchased in this group adds this bonus to the loyalty member's loyalty points balance.

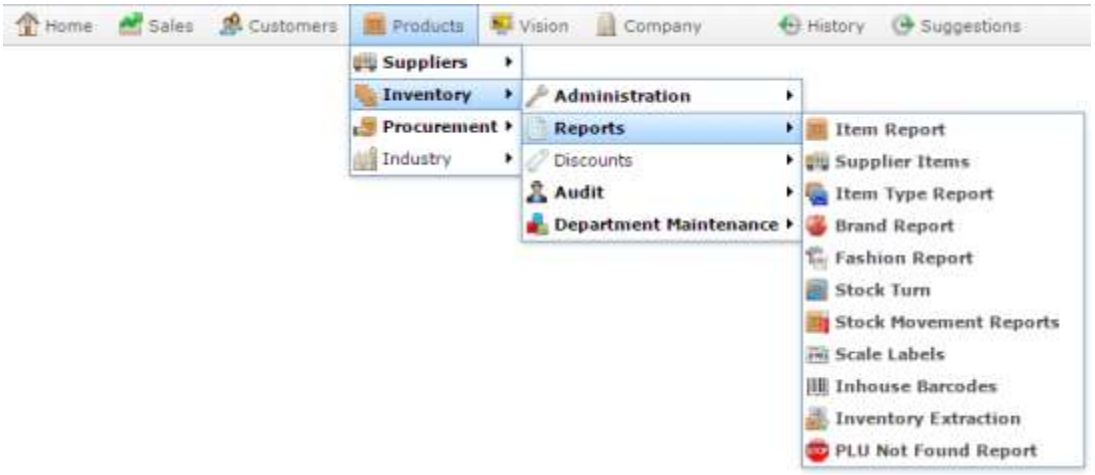
Missing PLU report

Use the Missing PLU report to view list of Price Look Up barcodes that have been scanned at your point of sale but do not correspond to an item in your inventory. The Portal attempts to create an item using the information it can capture. You can either accept the barcode as a permanent item in your inventory or reject and delete it.

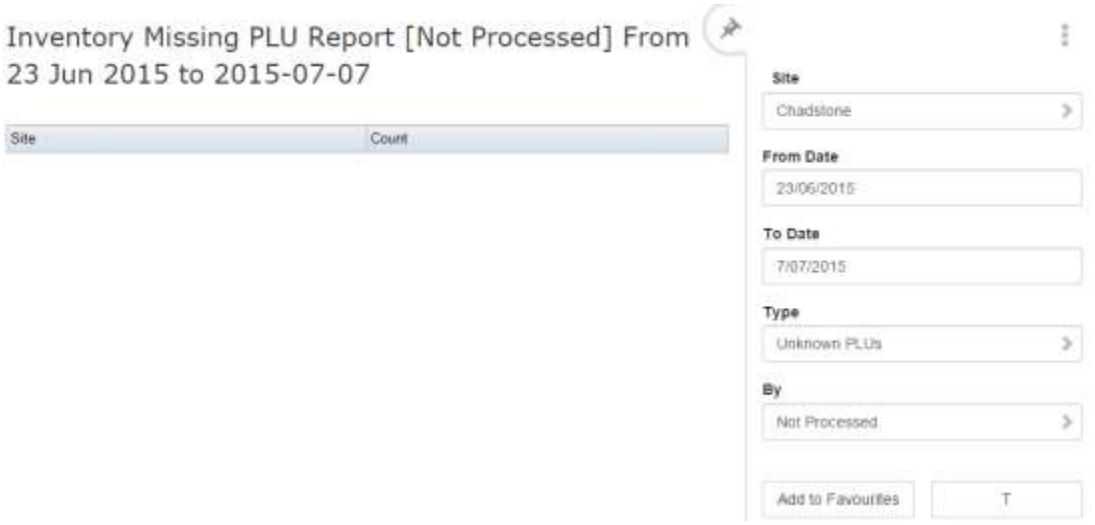
Opening the Missing PLU report

To open the Missing PLU report:

1. Press Products from the menu bar.
2. Press **Inventory > Reports > PLU Not Found report**.



The Missing PLU report is displayed.



Missing PLU report key fields

Filters area

Use this area to filter the results shown in the report.

Field	Description
	Press to add this report to your Portal favourites for easier access.
Site	Select the site to report on.
Date / **Date From and Date To /** **As of**	Select the date or date period to report on.
Type	Filter the report to: ▪ Unknown PLUs ▪ Missing PLUs.
By	Filter the report by missing or unknown PLUs that have been: ▪ Not Processed. ▪ Processed. ▪ Disallowed. ▪ Allowed. ▪ All missing or unknown PLUs.

Report area

This area displays report information.

Field	Description
Site	The site that recorded the barcode. Press to drill down to individual barcodes that you can accept or reject.
Count	The number of barcodes scanned that do not match items.

Managing price embedded barcodes

You can create barcodes in the Portal that encode an item's price and weight so that items can be scanned for sale without having to be weighed. The Portal can support multiple types of embedded barcodes with different configurations.

See *Price / Weight Embedded Barcodes Maintenance screen* on page 236.

What you can do:

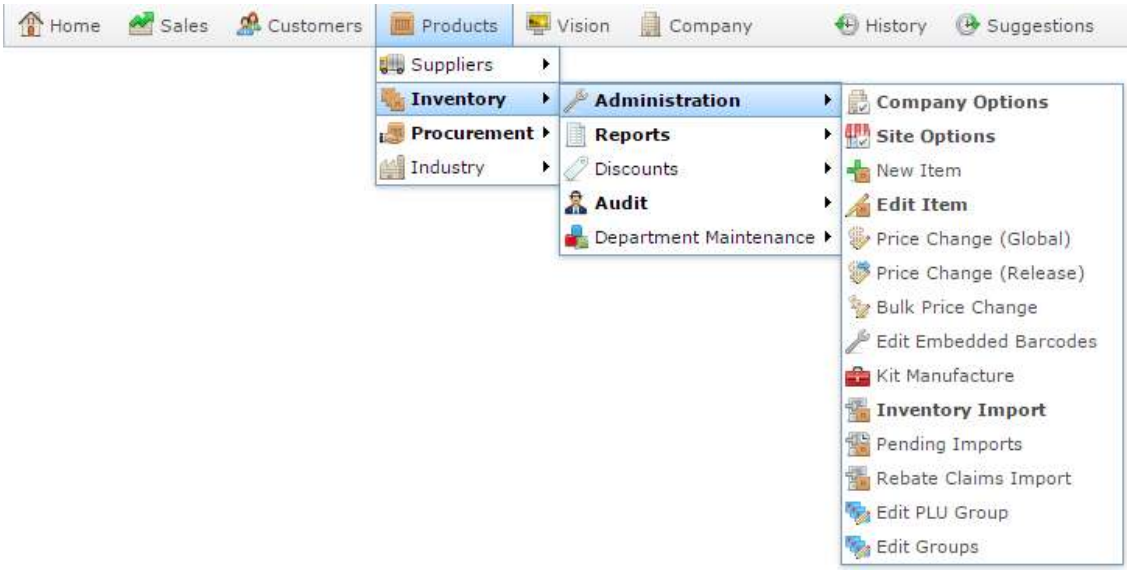
- *Adding an embedded barcode type* on page 230.
- *Editing an embedded barcode type* on page 232.
- *Deleting an embedded barcode type* on page 234.

Adding an embedded barcode type

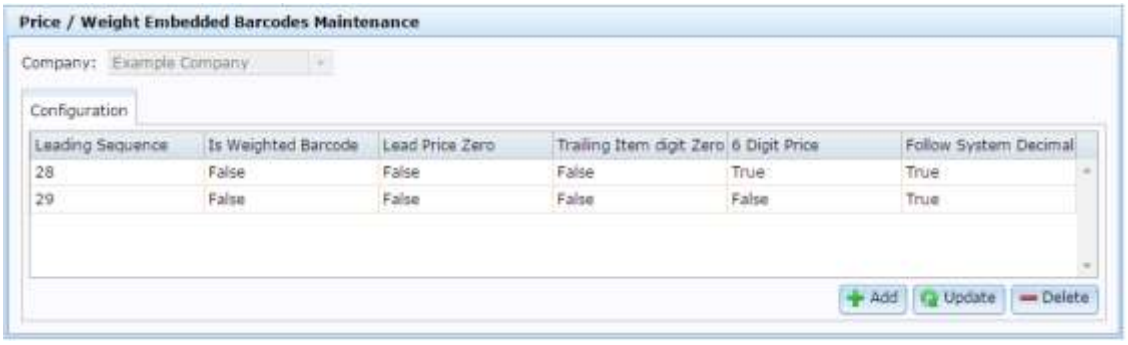
Add an embedded barcode type if you want the Portal to recognise a new configuration for price embedded barcodes.

To add a new embedded barcode type:

1. Press Products.
2. Press **Inventory > Administration > Edit Embedded Barcodes**.

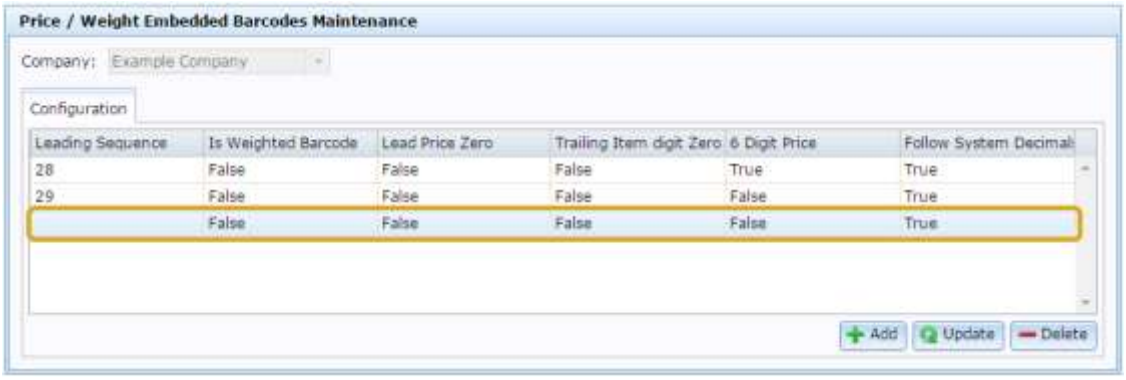


The Price / Weight Embedded Barcodes Maintenance screen is displayed.



3. Press Add.

The barcode type is added.



4. Type the digits the barcode must start with to be recognised as this embedded barcode type in the **Leading Sequence** field.

> **Note:** The **Leading Sequence** must be unique.

5. Select the configuration of the barcode as required.

   See *Price / Weight Embedded Barcodes Maintenance screen* on page 236.

6. Press Update.

   The barcode is saved.

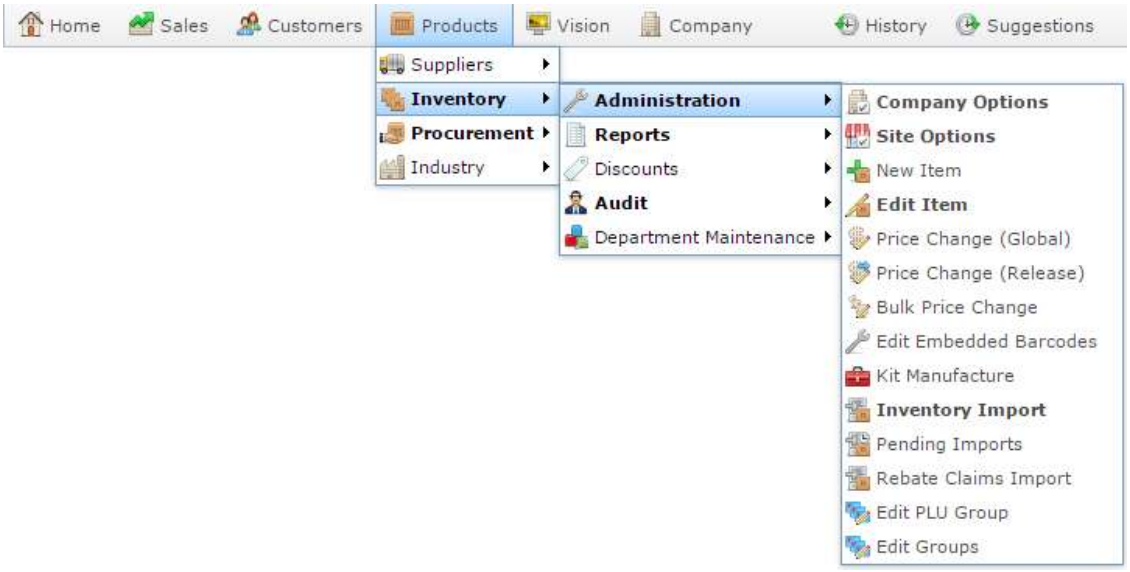
Editing an embedded barcode type

Edit an embedded barcode type if you want the Portal to change the configuration for an existing price embedded barcode.

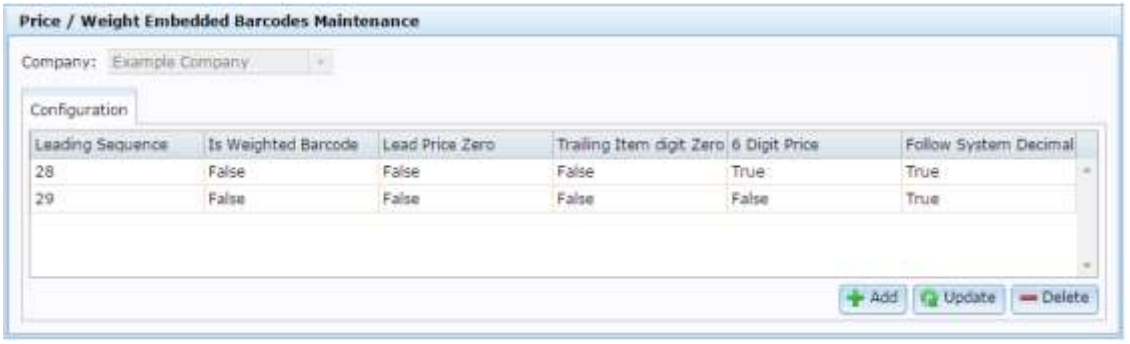
> **Note:** Any existing barcodes that use the old configuration will no longer be recognised by the Point of Sale.

To edit an embedded barcode type:

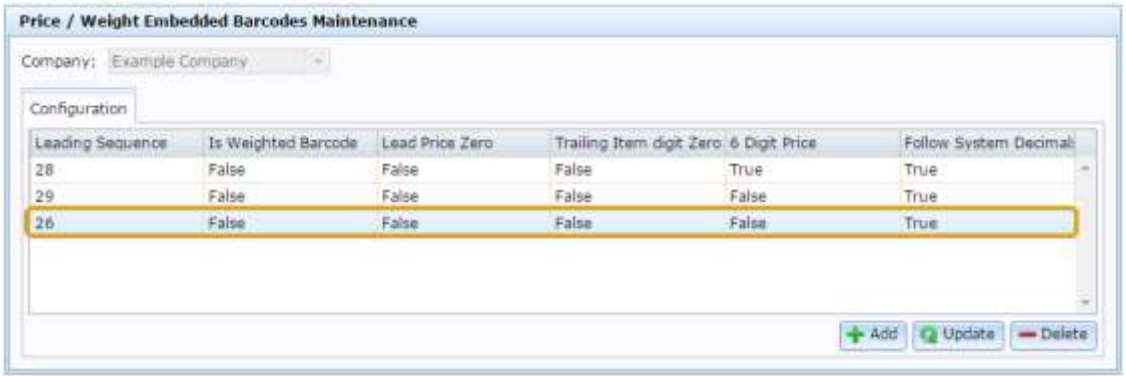
1. Press Products.
2. Press **Inventory > Administration > Edit Embedded Barcodes**.



The Price / Weight Embedded Barcodes Maintenance screen is displayed.



3. Select the barcode you want to edit and change the required fields.



See *Price / Weight Embedded Barcodes Maintenance screen* on page 236.

4. Press Update.

   The barcode is saved.

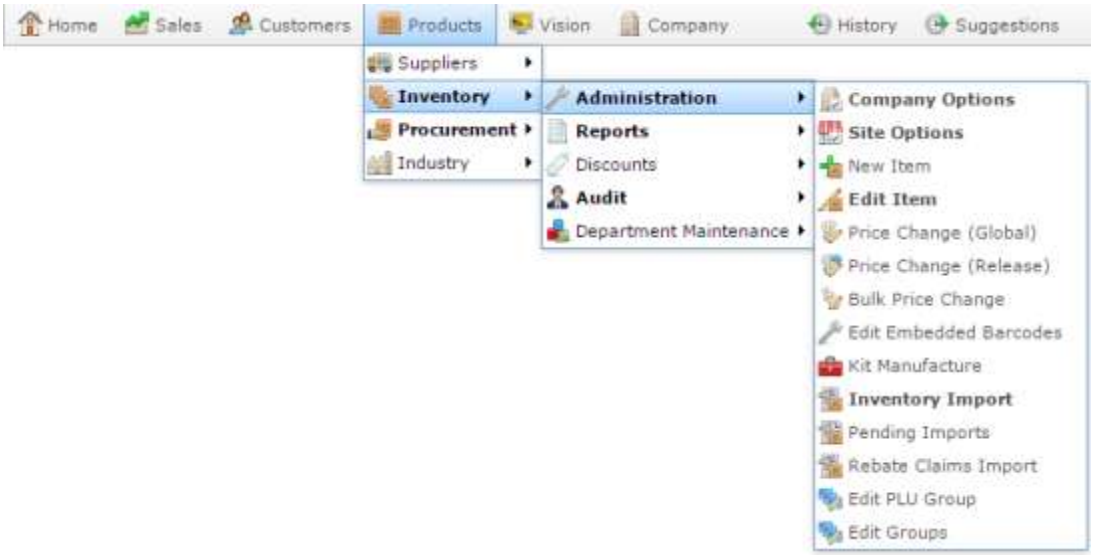
Deleting an embedded barcode type

Delete an embedded barcode type if you want the Portal to stop recognising a particular embedded barcode configuration.

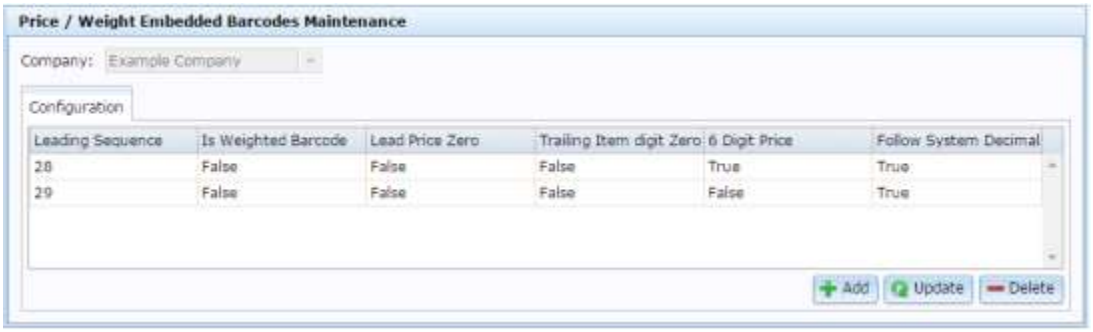
> **Note:** Any existing barcodes that use the deleted configuration will no longer be recognised by the Point of Sale.

To delete an embedded barcode type:

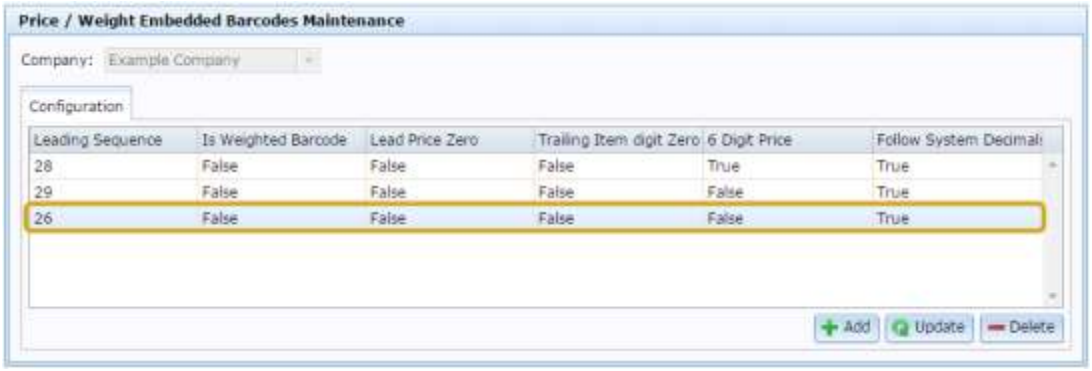
1. Press Products.
2. Press **Inventory > Administration > Edit Embedded Barcodes**.



The Price / Weight Embedded Barcodes Maintenance screen is displayed.



3. Select the barcode you want to delete.



4. Press Delete.

   The barcode is deleted.

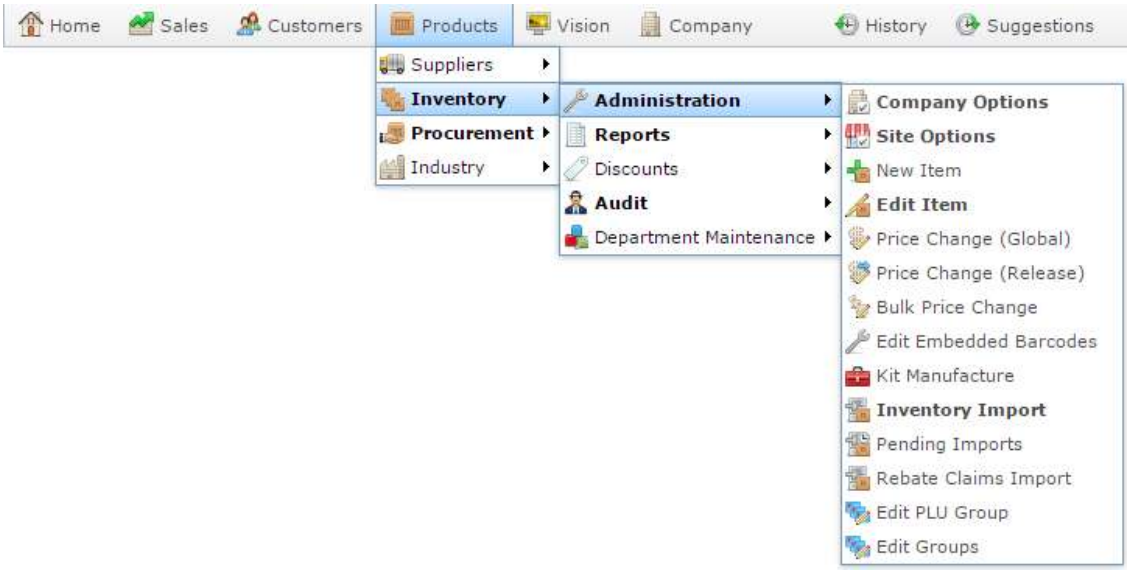
Price / Weight Embedded Barcodes Maintenance screen

Use the Price / Weight Embedded Barcodes Maintenance screen to define different types of price or weight embedded barcodes for the Portal.

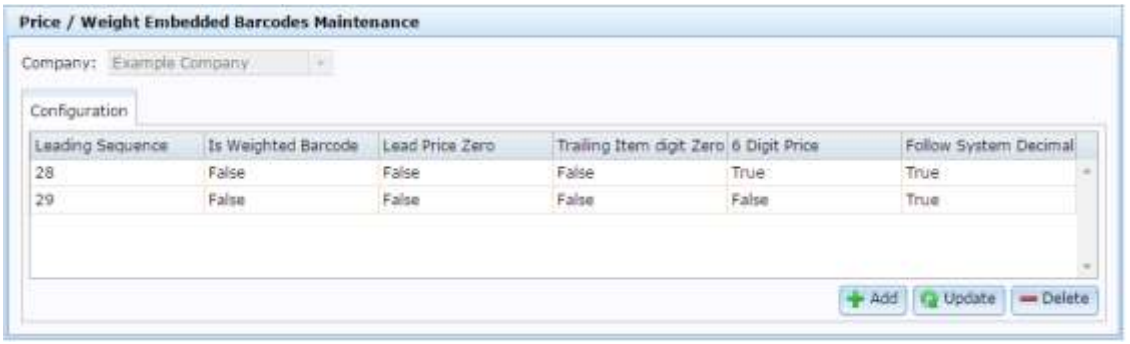
Opening the Price / Weight Embedded Barcodes Maintenance screen

To open the Price / Weight Embedded Barcodes Maintenance screen:

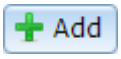
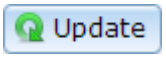
1. Press Products.
2. Press **Inventory > Administration > Edit Embedded Barcodes**.



The Price / Weight Embedded Barcodes Maintenance screen is displayed.



Price / Weight Embedded Barcodes Maintenance screen key fields and buttons

Field	Description
Leading Sequence	Type the first digits of the barcode that the Portal uses to recognise this type of embedded barcode.
Is Weighted Barcode	Type **True** if this barcode embeds the weight of the item.
Lead Price Zero	Type **True** if this barcode embeds price with a lead digit of 0.
Trailing Item digit Zero	Type **True** if this barcode embeds the item code with a trailing zero digit.
6 Digit Price	Type **True** if this barcode embeds the price of the item as a six digit number.
Follow System Decimal	Type **True** if this barcode follows the default system setting for use of decimal places.
	Press to add another price embedded barcode type. See *Adding an embedded barcode type* on page 230.
	Press to save any changes to the embedded barcode types. See *Editing an embedded barcode type* on page 232.
	Press to delete the selected embedded barcode types. See *Deleting an embedded barcode type* on page 234.

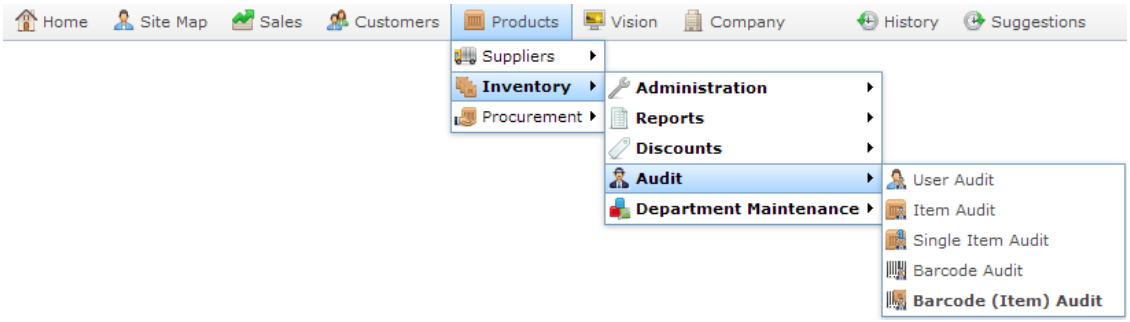
Single Barcode Audit report

Use the Single Barcode Audit report to view the edits made to an item's barcodes over a period of time.

Opening the Single Barcode Audit report

To open the Single Barcode Audit report:

1. Press Products from the menu bar.
2. Press **Inventory > Audit > Barcode (Item) Audit**.



The Find Item screen is displayed.

3. Search for the item you want to audit the barcodes of.

   See *Finding an item using the search screen* on page 50.

   The Single Barcode Audit report is displayed.

Item 553 [Master Food Sauce [1]] : Barcode Audit Report - By All

Site	Barcode	Item	Description	Date	Operator	Function
Chadstone	0009800000001	553	Master Food Sauce	23/12/2013, 16:07:29	Example	Created
Chadstone	0009800000001	553	Master Food Sauce	23/12/2013, 16:08:20	Example	Deleted
Chadstone	0160000000055	553	Master Food Sauce	23/12/2013, 16:08:26	Example	Created
Chadstone	0160000000055	553	Master Food Sauce	23/12/2013, 16:08:54	Example	Deleted

Single Barcode Audit report key fields

Filters area

Use this area to filter the results shown in the report.

Field	Description
	Press to add this report to your Portal favourites for easier access.
Site	Select the site to report on.
Date / **Date From and Date To /** **As of**	Select the date or date period to report on.
By	Filter the report by whether the barcode was: ▪ Created. ▪ Deleted. ▪ Created during a master create. ▪ Deleted during a master delete. ▪ Or display all barcodes that have been modified.

Report area

This area displays report information.

Note: Not all fields may be displayed at once. Some fields depend on your filter field selections.

Field	Description
Item / Description	Description of the item. **Note:** Click on the description to access other options in a popup menu.
Site	Site the item belongs to.
Barcode	Barcode listed for the item.
Item Number / Item	The item code of the item.
Date	Date the change occurred.
Operator	Portal operator responsible for the change.
Function	The type of edit process, for example, created, edited or deleted.

Inhouse Barcodes report

Use the Inhouse Barcodes report to view non-registered barcodes that your company uses in-house. These barcodes are not registered with external organisations, and are limited to specific ranges:

- 02xxxxxxxxxC
- 2xxxxxxxxxxC

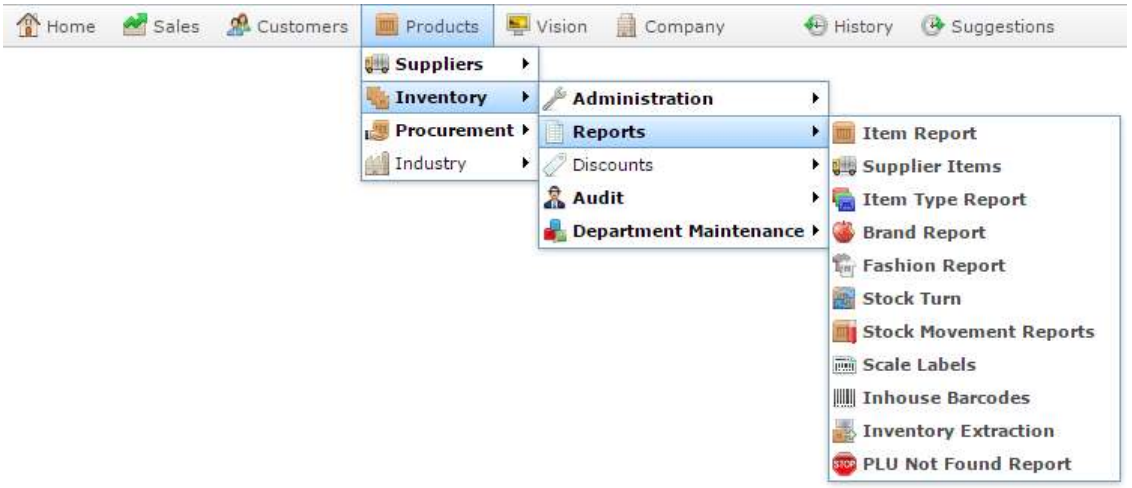
The final digit in all barcodes, represented above by **C**, is a check digit to ensure the barcode has scanned correctly.

Note: If you use price-embedded or weight-embedded barcodes, these are generated by the Portal on-demand, and not displayed in this report. Price-embedded and weight-embedded barcodes also start with a 2, but encode the item number and weight or price into the barcode. The exact encoding depends on your barcode configuration. For example, **29xxxxxPPPPPC**, where the item code is stored in **xxxxx** , and the price or weight is coded in **PPPPP** , followed by the check digit, **C**. See *Managing price embedded barcodes* on page 229.

Opening the Inhouse Barcodes report

To open the Inhouse Barcodes report:

1. Press Products from the menu bar.
2. Press **Inventory > Reports > Inhouse Barcodes**.



The Inhouse Barcodes report is displayed.

Inventory In House Barcode Report for Site Chadstor
Count
Inhouse Barcodes
0
Site
Chadstone
Add to Favourites

Inhouse Barcodes report key fields

Filters area

Use this area to filter the results shown in the report.

Field	Description
	Press to add this report to your Portal favourites for easier access.
Site	Select the site to report on.

Report area

This area displays report information.

Note: Not all fields may be displayed at once. Some fields depend on your filter field selections.

Field	Description
Count	The number of inhouse barcodes used by the selected site.

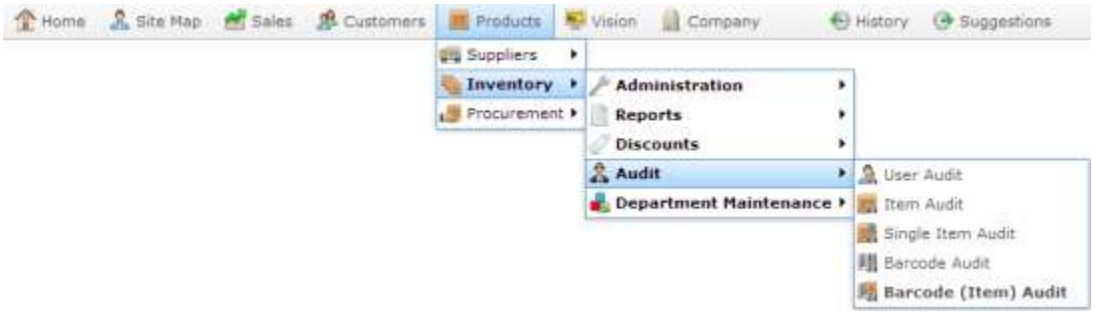
Barcode Audit report

Use the Barcode Audit report to view the edits made to item barcodes over a period of time.

Opening the Barcode Audit report

To open the Barcode Audit report:

1. Press Products from the menu bar.
2. Press **Inventory > Audit > Barcode Audit**.



The Barcode Audit report is displayed.

Barcode Audit report key fields

Filters area

Use this area to filter the results shown in the report.

Field	Description
	Press to add this report to your Portal favourites for easier access.
Site	Select the site to report on.
Date / **Date From and Date To /** **As of**	Select the date or date period to report on.
By	Filter the report by whether the barcode was: ▪ Created. ▪ Deleted. ▪ Created during a master create. ▪ Deleted during a master delete. ▪ Or display all barcodes that have been modified.

Report area

This area displays report information.

Note: Not all fields may be displayed at once. Some fields depend on your filter field selections.

Field	Description
Item / Description	Description of the item. **Note:** Click on the description to access other options in a popup menu.
Site	Site the item belongs to.
Barcode	Barcode listed for the item.
Item Number / Item	The item code of the item.
Date	Date the change occurred.
Operator	Portal operator responsible for the change.
Function	The type of edit process, for example, created, edited or deleted.

Managing item audits and reports

You can use various item reports to view changes that have been made to items, and other item information.

Audit reports:

Use these reports to view changes to items and barcodes, individual items, or changes made by Portal operators.

- *Barcode Audit report* on page 246.
- *Item Audit report* on page 140.
- *Single Barcode Audit report* on page 238.
- *Single Item Audit report* on page 135.
- *User Audit report* on page 153

Item reports:

- *Brand report* on page 255.
- *Brand Grid report* on page 250.
- *Style report* on page 262.
- *Style Grid report* on page 258.
- *Inhouse Barcodes report* on page 242.
- *Inventory Extraction report* on page 273.
- *Item report* on page 144.
- *Item Type report* on page 287.
- *Missing PLU report* on page 226.
- *Scale Label Generation report* on page 269.
- *Stock Movement report* on page 280.
- *Stock Turn report* on page 265.
- *Supplier Item report* on page 277.
- *Import Pending Upload report* on page 133.

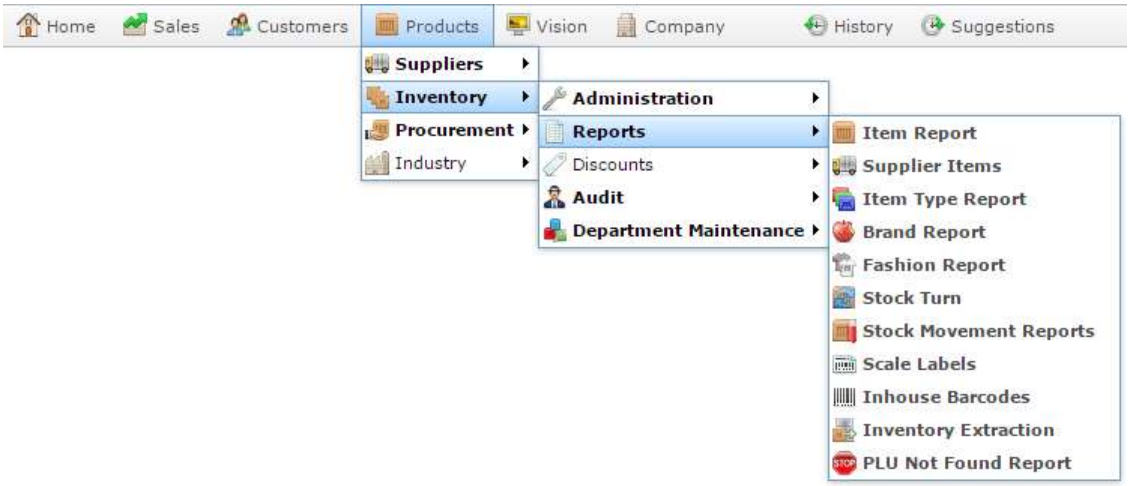
Brand Grid report

Use the Brand Grid report to view the items within a particular brand.

Opening the Brand Grid report

To open the Brand Grid report:

1. Press Products from the menu bar.
2. Press **Inventory > Reports > Brand Report**.



The Brand report is displayed.

3. Press the **Description** of the brand you want to view the grid of.

The Brand Grid report is displayed.

Inventory Brand Grid Report

Descri	Item	Size	Pack	Suppli	Item Type	Depart	Cost (Ex)	Cost (Inc)	Retail	SOH	Total Value (Inc)	Total Value (Ex)	Retail Value
Shirt (White Regul: L)	30000	Each	1	ACME Produc		Cafe	$3.03	$3.33	$13.9	50.0	$166.5	$151.4	$698.0
Shirt (Black Regul: Small)	34000	Each	1	ACME Produc		Cafe	$10.52	$11.57	$21.9	0.0	$0.00	$0.00	
Shirt (White Regul: Small)	34000	Each	1	ACME Produc		Cafe	$10.6	$11.6	$22.21	0.0	$0.00	$0.00	
Shirt (Black Regul: L)	34000	Each	1	ACME Produc		Cafe	$11.4	$12.6	$23.94	0.0	$0.00	$0.00	
Americ T Bones	70	1	1	ACME Produc		Deli	$12.2	$13.4	$17.9	-14.0	$0.00	$0.00	
Total										**50.0**	**$166.5**	**$151.4**	

Site

Chadstone

Supplier

All

Group Ident

ACMEx Products

Add to Favourites

Brand Grid report key fields

Filters area

Use this area to filter the results shown in the report.

Field	Description
	Press to add this report to your Portal favourites for easier access.
Site	Select the site to report on.
Supplier / Creditor	Select to restrict the report to a particular supplier, or to items where the supplier has not been selected.
Brand / Group Ident	Filter the report to the selected brand.

Report area

This area displays report information.

Note: Not all fields may be displayed at once. Some fields depend on your filter field selections.

Field	Description
Item / Description	Description of the item. **Note:** Click on the description to access other options in a popup menu.
Department	Description of the department the item belongs to.
Size	Size of the item.
Pack	Number of units in a single pack.
Supplier	Supplier of the item.
Item Type	Item type, as defined for your company.
Item Number / Item	The item code of the item.
Cost (Ex) / Cost Ex	The item cost, not including tax. See *Inventory Management - Pricing tab* on page 76.

Field	Description
Cost (Inc)	The item cost including tax. See *Inventory Management - Pricing tab* on page 76.
Retail **Retail Price**	The retail price of the item. See *Inventory Management - Pricing tab* on page 76.
SOH	The stock-on-hand of the item.
Total Value (Inc)	The total cost of the items on hand, including tax.
Total Value (Ex)	The total cost of the items on hand, excluding tax.
Retail Value	The total retail of the items on hand.

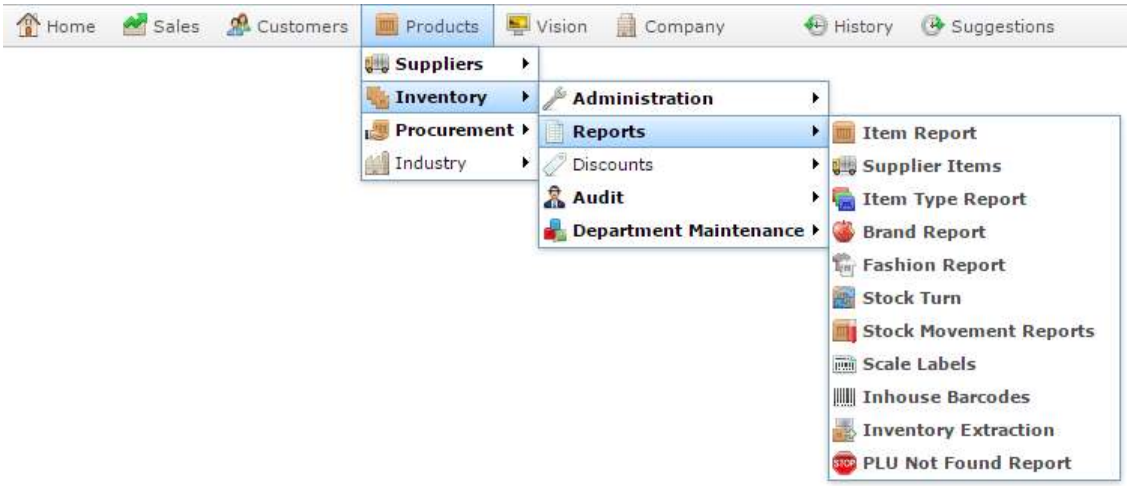
Brand report

Use the Brand report to view an overview of brands and the number of items in each brand.

Opening the Brand report

To open the Brand report:

1. Press Products from the menu bar.
2. Press **Inventory > Reports > Brand Report**.



The Brand report is displayed.

Brand report key fields

Filters area

Use this area to filter the results shown in the report.

Field	Description
	Press to add this report to your Portal favourites for easier access.

Report area

This area displays report information.

Note: Not all fields may be displayed at once. Some fields depend on your filter field selections.

Field	Description
Description	Description of the brand. Press to open the Brand Grid report. See *Brand Grid report* on page 250.
Reference	Unique name of the brand.
Number of Items	Number of items included in this brand.

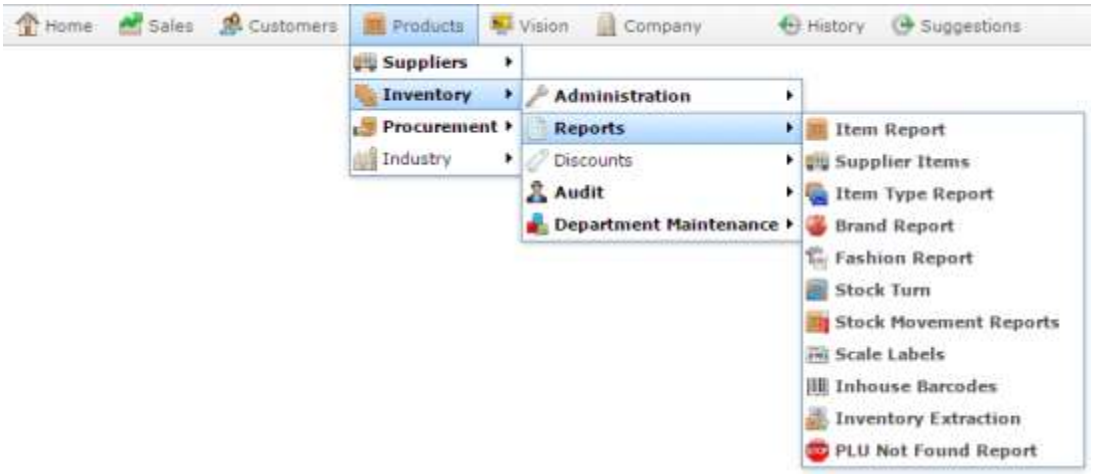
Style Grid report

Use the Style Grid report to view the number of items by colour and size in a particular style.

Opening the Style Grid report

To open the Style Grid report:

1. Press Products from the menu bar.
2. Press **Inventory > Reports > Fashion Report**.



The Style report is displayed.

3. Press the **Description** of the style you want to view a grid for.

The Style Grid for that item is displayed.

Style Stock On Hand Grid - Regular fit
Colour
Small
Large
Total
White
50
50
Black
0
0
Total
0
50
50
Site
All
Style
Regular fit
Item Type
All
Add to Favourites

Style Grid report key fields

Filters area

Use this area to filter the results shown in the report.

Field	Description
	Press to add this report to your Portal favourites for easier access.
Site	Select the site to report on.
Style	Filter the report to the selected style.

Report area

This area displays report information.

> **Note:** Not all fields may be displayed at once. Some fields depend on your filter field selections.

Field	Description
Colour	List of colours configured for your company. **Note:** Your configuration may use a different term.
Size(s)	Number of units in stock of items in each colour and size for this style. **Note:** Your configuration may use a different term.
Total	Total number of units in each size and colour.

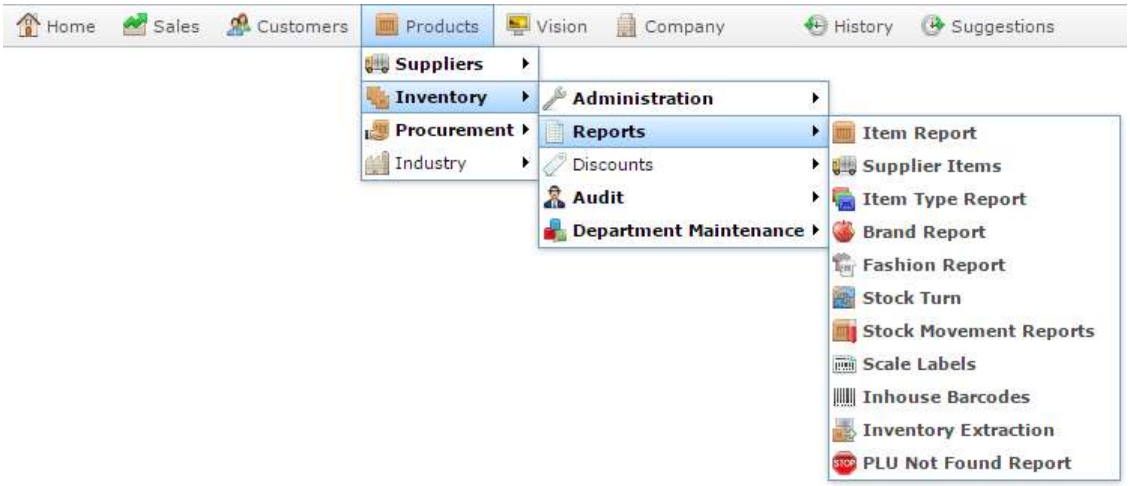
Style report

Use the Style report to view an overview of styles and the number of items in each style.

Opening the Style report

To open the Style report:

1. Press Products from the menu bar.
2. Press **Inventory > Reports > Fashion Report**.



The Style report is displayed.

Style report key fields

Filters area

Use this area to filter the results shown in the report.

Field	Description
Add to Favourites	Press to add this report to your Portal favourites for easier access.

Report area

This area displays report information.

Note: Not all fields may be displayed at once. Some fields depend on your filter field selections.

Field	Description
Description	Description of the style. Press to open the Style Grid report. See *Style Grid report* on page 258.
Reference	Unique name of the style.

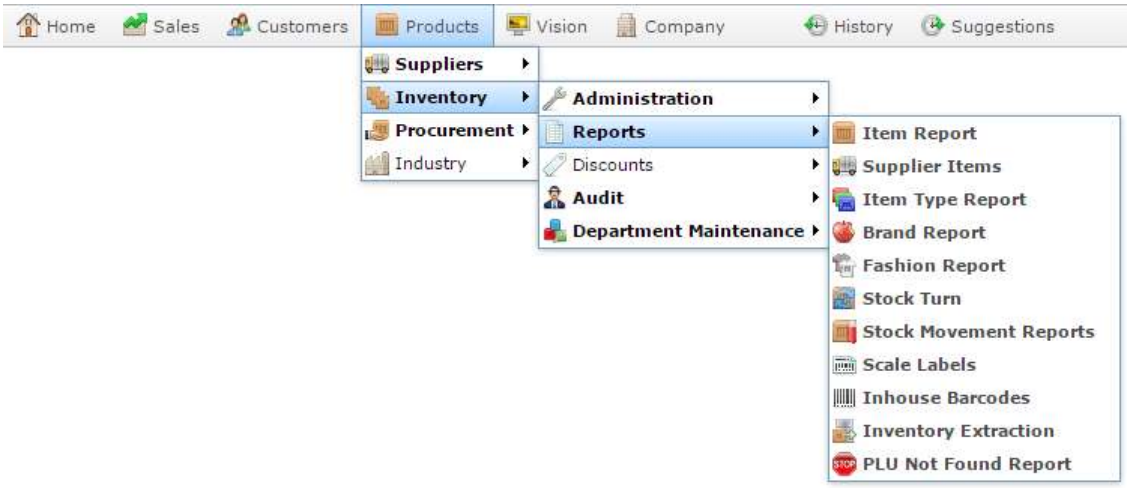
Stock Turn report

Use the Stock Turn report to view the movement of your stock by department, site, item type over the specified period.

Opening the Stock Turn report

To open the Stock Turn report:

1. Press Products from the menu bar.
2. Press **Inventory > Reports > Stock Turn**.



The Stock Turn report is displayed.

Stock Turn report key fields

Filters area

Use this area to filter the results shown in the report.

Field	Description
	Press to add this report to your Portal favourites for easier access.
Site	Select the site to report on.
Date / **Date From and Date To /** **As of**	Select the date or date period to report on.
Department	Select to filter the report by department.

Report area

This area displays report information.

Note: Not all fields may be displayed at once. Some fields depend on your filter field selections.

Field	Description
Item / Description	Description of the item. **Note:** Click on the description to access other options in a popup menu.
Department	Description of the department the item belongs to.
Item Number / Item	The item code of the item.
Retail **Retail Price**	The retail price of the item. See *Inventory Management - Pricing tab* on page 76.
Sales	Total dollar amount of units sold of this item during the specified period.
Cost	Total cost of units sold of this item during the specified period.
GP%	Gross profit of the sales for the selected period.
Opening Stock	Stock-on-hand at the start of the selected period.

Field	Description
Sold	Number of units sold during the selected period.
Received	Number of units received during the selected period.
Returned	Number of units returned during the selected period.
Adjusted	Number of units written off or adjusted during the selected period.
Transferred	Number of units transferred to other sites during the selected period.
Delta Stock Take	Number of units found or lost by stock takes during the selected period.
Delta Movement	Number of units changed during this period from the opening stock-on-hand level.
Closing Stock	Stock-on-hand levels at the end of the selected period.
Retail Value	Total retail value of the closing stock level.
Cost Value	Total cost of the closing stock level, including tax.
Cost (Ex) Value	Total cost of the closing stock level, excluding tax.

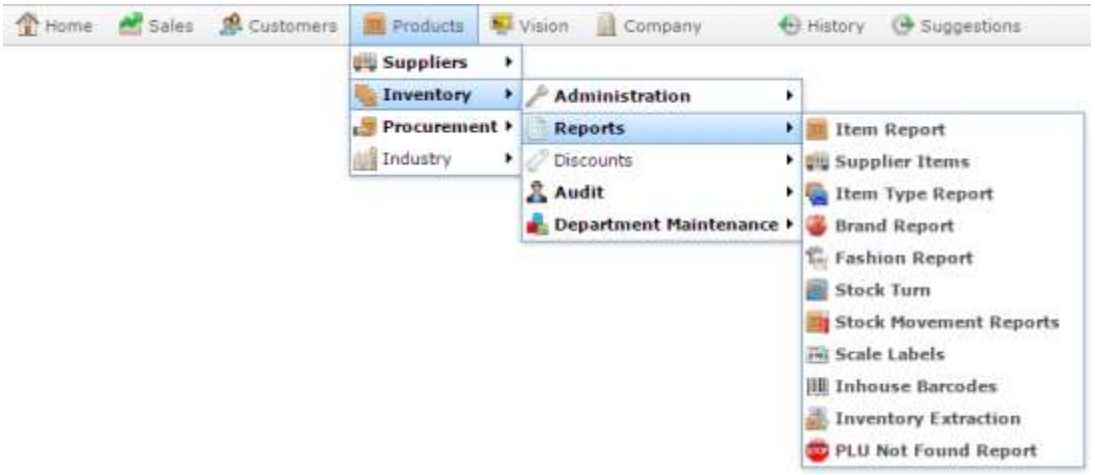
Scale Label Generation report

Use the Scale Label Generation report to view a list of scale labels generated per site, department and terminal during a specific period.

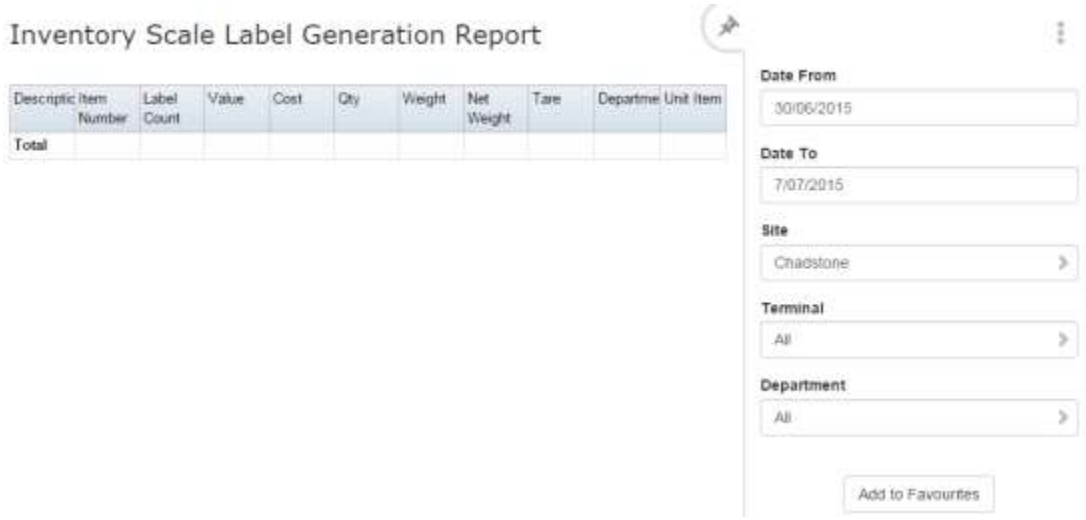
Opening the Scale Label Generation report

To open the Scale Label Generation report:

1. Press Products from the menu bar.
2. Press **Inventory > Reports > Scale Labels**.



The Scale Label Generation report is displayed.



Scale Label Generation report key fields

Filters area

Use this area to filter the results shown in the report.

Field	Description
	Press to add this report to your Portal favourites for easier access.
Site	Select the site to report on.
Date / **Date From and Date To /** **As of**	Select the date or date period to report on.
Department	Select to filter the report by department.
Terminal	Filter the report to a specific Point of Sale terminal.

Report area

This area displays report information.

Note: Not all fields may be displayed at once. Some fields depend on your filter field selections.

Field	Description
Item / Description	Description of the item. **Note:** Click on the description to access other options in a popup menu.
Department	Description of the department the item belongs to.
Item Number / Item	The item code of the item.
Label Count	Number of the printed label.
Value	Total cost of the labels printed for the item. For example, if an item is $10 per unit and you print labels for 5 units, the value is $50.
Cost	Cost of the item.
Qty	Number of units labelled.
Weight	Number of kilograms labelled.

Field	Description
Net Weight	Weight of item without any tare amounts.
Tare	Weight of item's packaging.
Unit Item	Indicates whether the item is sold per unit, as opposed to by weight.

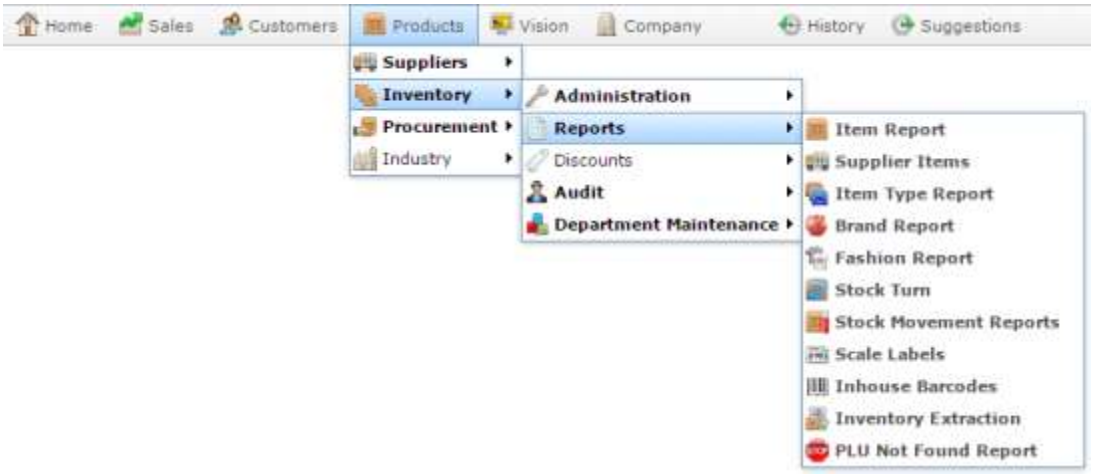
Inventory Extraction report

Use the Inventory Extraction report to export your inventory and all barcodes to an external system.

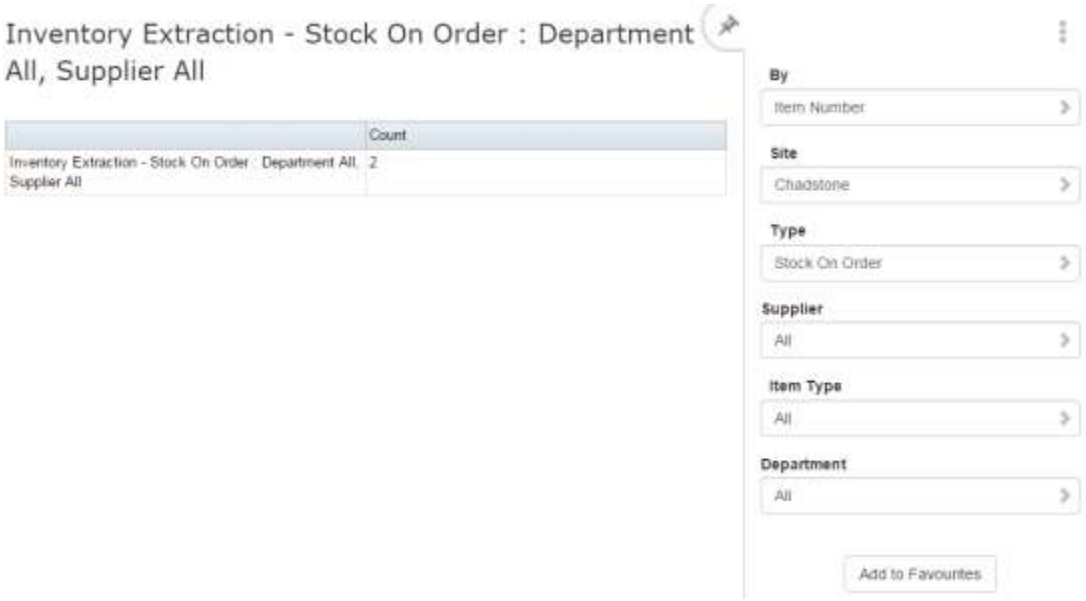
Opening the Inventory Extraction report

To open the Inventory Extraction report:

1. Press Products from the menu bar.
2. Press **Inventory > Reports > Inventory Extraction**.



The Inventory Extraction report is displayed.



Inventory Extraction report key fields

Filters area

Use this area to filter the results shown in the report.

Field	Description
Add to Favourites	Press to add this report to your Portal favourites for easier access.
Site	Select the site to report on.
Type	Select to change the report to other item criteria such as stock-on-hand levels.
Supplier / Creditor	Select to restrict the report to a particular supplier, or to items where the supplier has not been selected.
Item Type	Select to filter the report by item type.
Department	Select to filter the report by department.
By	Select to extract inventory items by: ▪ Item Number. ▪ Barcode.
Type	Filter the report to: **Stock On Hand** Items with stock-on-hand levels above zero. **Stock Above** Items with stock-on-hand levels above the

Field	Description
Maximum Level	maximum stock level listed in the Stock Control tab of Inventory Maintenance.
Stock On Order	Items with stock currently on order.
Stock Below Reorder Level	Items with stock-on-hand levels below the reorder level listed in the Stock Control tab of Inventory Maintenance.
Zero Priced Items	Items priced at zero.
Non Weighed Items	Items that are not sold by weight.
Weighed Items	Items that are sold by weight.
Sold Items	Items that have been sold.
Non Sold Items	Items that have not been sold.
All	All items.

Report area

This area displays report information.

Note: Not all fields may be displayed at once. Some fields depend on your filter field selections.

Field	Description
Inventory Extraction - Details	The selection criteria for extraction.
Count	The number of items selected for extraction.

Supplier Item report

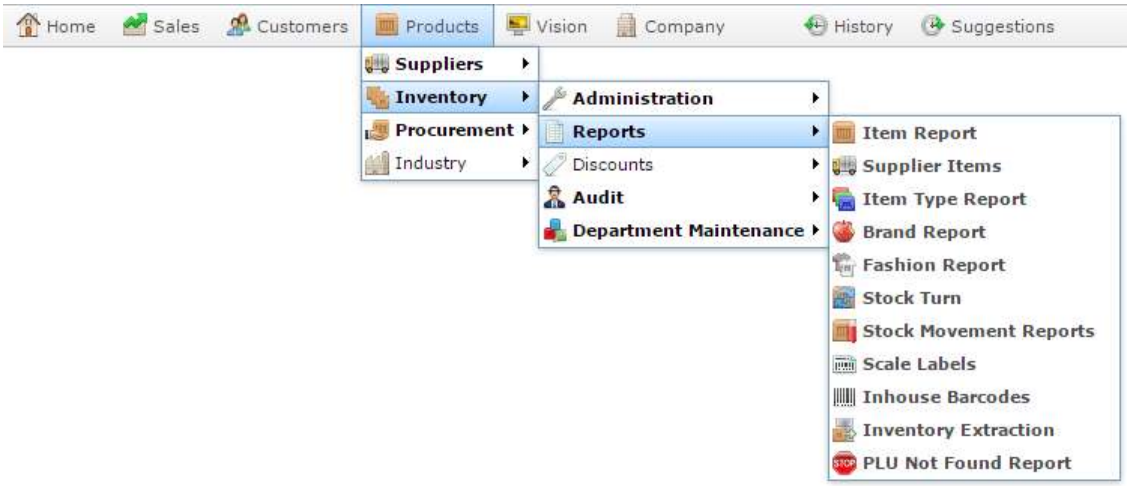
Use the Supplier Item report to view total number of items supplied by supplier, and drill down to see which items are supplied.

Also see *Item report* on page 144.

Opening the Supplier Item report

To open the Supplier Item report:

1. Press Products from the menu bar.
2. Press **Inventory > Reports > Supplier Items**.



The Supplier Item report is displayed.

Supplier Item report key fields

Filters area

Use this area to filter the results shown in the report.

Field	Description
	Press to add this report to your Portal favourites for easier access.
Site	Select the site to report on.

Report area

This area displays report information.

Note: Not all fields may be displayed at once. Some fields depend on your filter field selections.

Field	Description
Name / **Creditor /** **Supplier /** **Supplier Name**	Name of the creditor or supplier.
Creditor Code / **Number /** **Account /** **Supplier**	Unique code identifying the creditor.
Count	Total number of items supplied by this supplier.

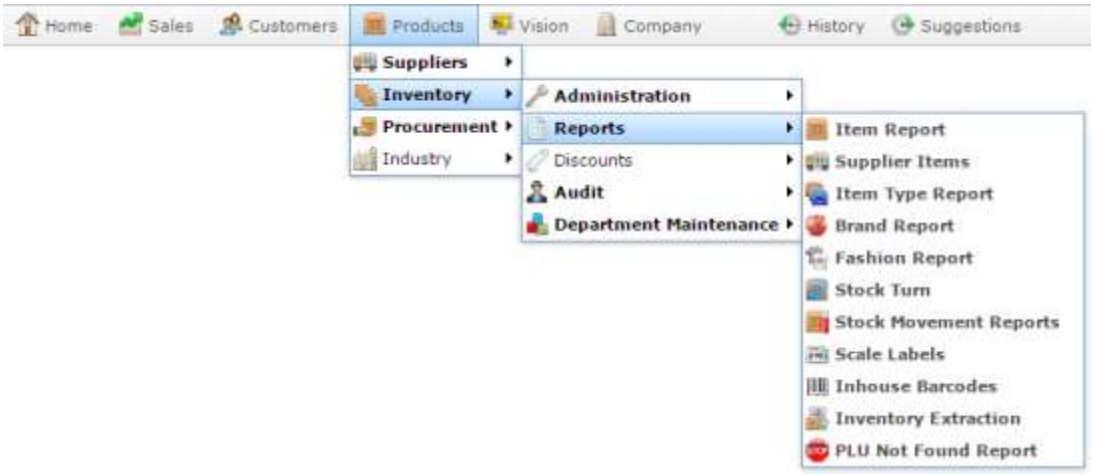
Stock Movement report

Use the Stock Movement report to view how your stock has moved during a specific date range.

Opening the Stock Movement report

To open the Stock Movement report:

1. Press Products from the menu bar.
2. Press **Inventory > Reports > Stock Movement Reports**.



The Stock Movement report is displayed.

Stock Movement report key fields

Filters area

Use this area to filter the results shown in the report.

Field	Description
	Press to add this report to your Portal favourites for easier access.
Site	Select the site to report on.
Date / **Date From and Date To /** **As of**	Select the date or date period to report on.
Department	Select to filter the report by department.
Option	Select to filter the report by: ▪ Item Cost. ▪ Item Quantity. ▪ Item Recommended Retail Price (RRP).

Report Area

This area displays report information.

Field	Description
Prime Item	Description of the item.
Item	Unique code identifying the item.
Opening Stock	Total dollar amount of stock at the selected site at the start of the period.
Receipts	Total dollar amount of this item receipted during this period.
Sales	Total dollar amount of this item sold during this period.
IBT	Total dollar amount of this item sent via inter-branch transfers during this period.
Closing Stock	Total dollar amount of stock at the selected site at the end of the period.

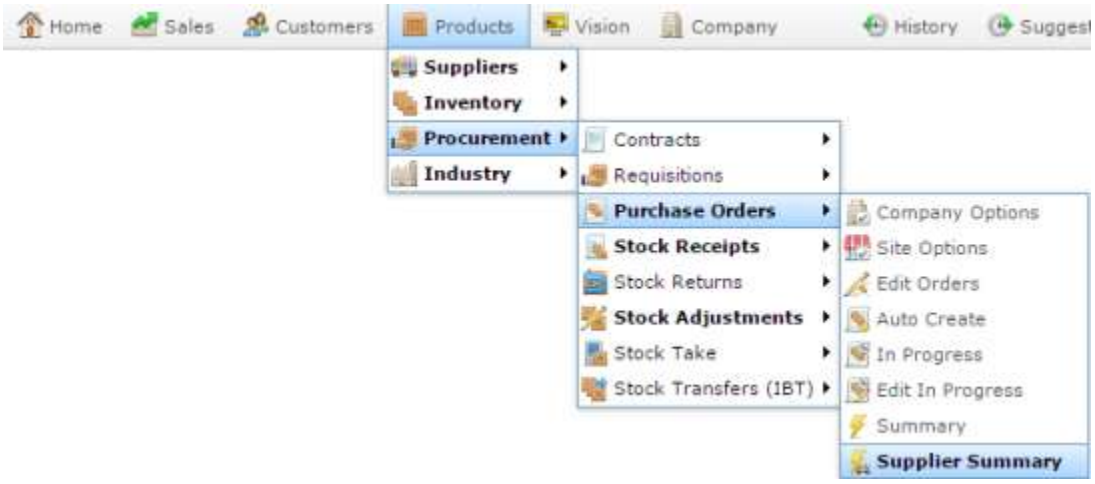
Items Purchased From Supplier report

Use the Items Purchased From Supplier report to view the items you have ordered most from a given supplier, and the total cost of each item ordered over a time period per site.

Opening the Items Purchased From Supplier report

To open the Items Purchased From Supplier report:

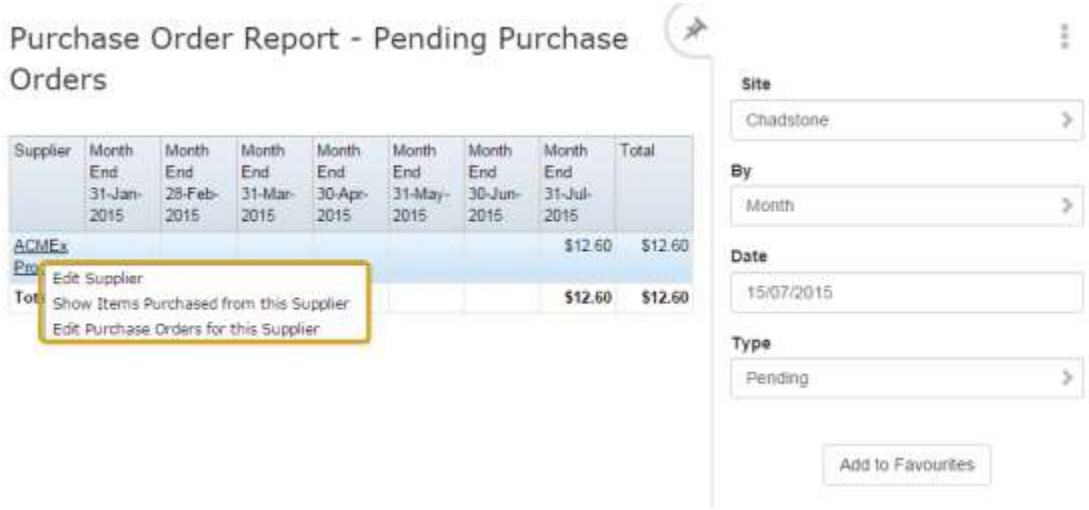
1. Press Products from the menu bar.
2. Press **Procurement > Purchase Orders > Supplier Summary**.



The Purchase Order Supplier Summary report is displayed.

3. Press the **Supplier** of the supplier you want to view the items of.

A popup menu is displayed.



4. Press **Show Items Purchased From This Supplier**.

   The Items Purchased From Supplier report is displayed.

Items Purchased From Supplier report key fields

Filters area

Use this area to filter the results shown in the report.

Field	Description
	Press to add this report to your Portal favourites for easier access.
Site	Select the site to report on.
By	Select to display the report for a specific day, week or month.
Date / **Date From and Date To /** **As of**	Select the date or date period to report on.
Display	Select the number of records to display.

Report area

This area displays report information.

Note: Not all fields may be displayed at once. Some fields depend on your filter field selections.

Field	Description
Item / Description	Description of the item. **Note:** Click on the description to access other options in a popup menu.
Day **Week End** **Month End**	Total dollar amount of stock received for the selected day, week or month.
Total	Total dollar amount of stock received for the displayed period.

Item Type report

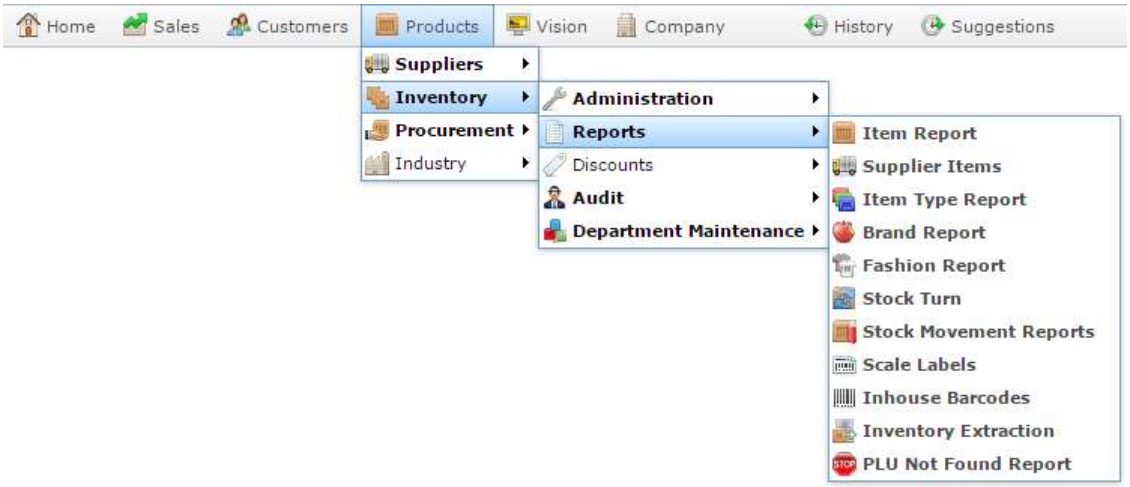
Use the Item Type report to view an overview of item types and the number of items in each type.

Note: Item types are created in the Edit Item Type report in Company Maintenance. Items are assigned to types in the Stock Control tab of Item Maintenance. See *Inventory Management - Stock Control tab* on page 81.

Opening the Item Type report

To open the Item Type report:

1. Press Products from the menu bar.
2. Press **Inventory > Reports > Item Type report**.



The Item Type report is displayed.

Item Type report key fields

Filters area

Use this area to filter the results shown in the report.

Field	Description
Add to Favourites	Press to add this report to your Portal favourites for easier access.

Report area

This area displays report information.

Note: Not all fields may be displayed at once. Some fields depend on your filter field selections.

Field	Description
Description	Description of the item type. Press to view an Item report of all items in this type.
Reference	Unique name of the item type.
Number of Items	Number of items included in this type.

Glossary

Account

An account is a general ledger structure that categorises particular kinds of income or expenditure for financial reports. Accounts may also be called Ledgers in the Portal.

Aged balance

An aged balance is an amount of money owed that has been adjusted to factor an interest rate applied over time. For example: you owe a creditor $1000, with a 10% interest. You pay $700, leaving $300 still to pay. After the interest period elapses, 10% interest is applied to the remaining $300. Your aged balance is now $330.

Balance

A balance is the total amount of money owed either by yourself to a creditor, or by a debtor to you. A balance may be:

- Positive, indicating money is owed.
- Zero, indicating no money is owed.
- Negative, indicating the party who owed money has over-paid. For example, if you pay a creditor $1000 when you only owed $999, your balance would be -$1.

Barcode

A barcode is a string of numbers that links to an item. Items can have multiple barcodes assigned to them. Some barcodes called Price Embedded Barcodes encode information such as the quantity, weight or price of the item into the barcode. You can configure different types of price embedded barcodes in the Portal.

Batch (kit manufacture)

When manufacturing kits, a batch identifies a single point in time where a specified number of kits were manufactured together.

Batch (stock take)

When performing a continuous stock take, a batch identifies a collection of items scanned at one time by one or more PDTs.

Brand

A brand is a means of identifying items that belong to the same product line. Items can only have one brand, but items from different suppliers may have the same brand.

Company

A company represents your organisation within the Portal. A company can have one or more sites, representing physical locations of stores, including online stores. Some Portal configurations and features affect the entire company, other configurations can be specified per site.

Complete Order

A customer order is complete when:

- The order has been fulfilled on the Portal.
- The order has been marked as paid in full on the Portal or the customer has paid the remaining amount on the Point of Sale.
- The order has been collected or delivered.

Contract

A contract is a set of rules dictating the price, quantity and incentives offered by a supplier for a specific item, used by the Portal when calculating the best supplier to purchase a particular quantity of that item. Each contract relates to a single supplier and item, and you can have multiple contracts for each supplier and each item.

Controlled purchase order / Controlled requisition

A controlled purchase order or requisition cannot be finalised until it has been authorised by Head Office.

Cost matrix / price matrix

A cost matrix or price matrix is a means by which the Portal can automatically calculate the price of an item at each price level based on the item's supplier cost. You can create multiple cost levels, so that the price levels of an item that cost $5 might be calculated very differently from an item that cost $10.

A price matrix can be:

- Department-based, where all items within a department follow the same cost level rules.
- Supplier-based, where all items from the same supplier follow the same cost level rules.

Only one method can be used. You can also elect to use neither.

Credit adjustment

A credit adjustment adds credit to a balance, decreasing the amount of money owed. For example, if you owed a creditor $100, a $10 credit adjustment would mean you owed $90. Credit adjustments are usually used to correct errors. If you need to decrease money owed due to a refund or return, you should use a credit note instead.

Credit limit

A credit limit is the maximum amount of money a debtor is allowed to owe your organisation at any one time. For example, if a debtor's credit limit is $1000 and they already owe $900, they can only go into debt to the value of another $100.

Credit note

A credit note adds credit to a balance, decreasing the amount of money owed. It is usually created when a balance needs to be adjusted due to a return, refund or rebate.

Creditor

A creditor is an entity to whom your company owes money. They may be a supplier, providing the items your company sells, or they may provide another service, such as a cleaner. The Portal treats suppliers and creditors the same. They have a balance tracking how much you owe them, and a credit limit that determines how much your company is allowed to owe them at a time.

Creditor payment

A creditor payment is a Portal record of paying invoices or debit adjustments. More than one invoice or debit adjustment may be paid either partially or in full in a single payment record. Creditor payments are a Portal record only and are not connected to your bank account.

Cross-reference

A cross-reference records the supplier's internal item code for an item to streamline the ordering process. Cross-references can make stock receipting easier, if suppliers use their internal codes on delivery dockets. Cross-references are also required to use the Portal Data Interchange (PDI) feature.

Colour

A colour is one of the three item variation options under Fashion. An item with a designated style may have a colour defined, as well as a size. The terms colour size and style may be renamed for your Portal configuration.

Customer

A customer is a person or organisation who purchases items in advance, to be collected or delivered at a later date. Customers may also have debtor accounts, where they are allowed to owe money to your organisation and can pay off that debt via the Point of Sale.

Debit adjustment

A debit adjustment debits a balance, increasing the amount of money owed. For example, if you owed a creditor $100, a $10 debit adjustment would mean you owed $110. Debit adjustments are usually only used for corrections. If you need to record a charge due to an order of goods or services, you should use an invoice.

Delivery docket

A delivery docket is a type of stock receipt that records the incoming stock without creating a creditor invoice. Delivery dockets cannot record delivery fees or discounts. You can match delivery docket stock receipts to creditor invoices.

Department

A department is a means of categorising items in your inventory. Items can belong to only one department. Depending on your Portal configuration, you may have up to five levels of departments in a hierarchy, by default called Departments, Sub Departments, Categories, Sub Categories and Ranges.

> **Note:** This documentation uses the Portal default names for these levels: Department and Division. Your Portal may be configured to use different names, but the function is the same. You can see the names and levels your Portal uses in the Department Layers tab of Company Maintenance.

Department promotion

A department promotion is a promotion that applies to all items within a specific department. A department promotion allows you to provide a discount for the items purchased, either immediately or as a credit voucher. The promotion can be restricted to only provide a discount if a minimum number of items or minimum sale amount is reached.

Discount

A discount is a reduction in the price of an item. Discounts can apply to:

- A selected item, calculated either per-unit or per-line.
- The whole transaction, calculated per-unit or per-line for every item in the transaction.

> **Note:** Some items may have discount maximums. If the discount you select is greater than the maximum discount allowed for the item, the item is only discounted up to its maximum level.

Per-unit discounts can:

- Reduce an item's price by a percentage of the original price. For example, 10% off.
- Reduce an item's price by a flat amount. For example, $1 off.
- Set the per-unit price to a set amount. For example, $5 per item.
- Set the price of the item to its cost price plus a set amount.
- Remove the tax of an item.

Per-line discounts can:

- Cap the total price for an item line to a predetermined amount. For example, the line total may be anything up to a maximum of $10.
- Set the total price for an item line to a predetermined amount. For example, the line total is $10.

A discount may also prompt the operator for a discount amount.

Note: The item and transaction discounts available and the item discount maximums are configured in the Portal.

Note: Special discounts such as some senior citizens or disability discounts make an item tax exempt. If a tax exempt discount is applied, the customer must supply their Senior Citizen or Tax Exempt ID during the tender process in order to receive the discount. The Point of Sale displays the discount as if from the normal tax-inclusive price.

Division

Divisions are top-level classifications for departments in your company. The Portal offers two kinds of divisions to support the Oracle financial interfaces: Reporting and Financial. Each department belongs to a single reporting division and a single financial division.

DSD

A DSD is an external supplier that is not part of your company. You may configure different rules and restrictions for direct suppliers than are used for the company warehouse. You can also restrict sites to use only warehouse suppliers and prevent them from ordering from direct suppliers.

Employee

An employee is a member of your company staff that you want to roster on to your staff schedule. Employees may or may not have access to Portal and Point of Sale systems.

Fashion

Fashion is the Portal feature that allows you to create variation of items, such as different colours, sizes and styles of the same item. The default labels of colour, size and style can be changed to something that suits your inventory.

Fixture

A fixture is a physical structure or area within your site that contains stock. This may include gondolas, counters, refrigerators, back-room receipt trolleys, tables, wall sections or any other area that regularly contains stock on your site. Fixtures are used primarily during stock take.

Group promotion

A group promotion is a promotion that applies to all items within a group that you define. A group promotion allows you to provide a free item or a discount for the items purchased, either immediately or as a credit voucher. The promotion can be restricted to only provide a discount if a minimum number of items or minimum sale amount is reached.

Group purchase order

A group purchase order is a purchase order that combines the requisitions from several sites into one purchase order. Stock levels can be allocated to each site during the creation of the order.

Inventory

The inventory is the Portal feature of maintaining all items that you offer for sale in your company.

Invoice

An invoice details an amount owed by an entity such as your company or a debtor, and the goods or services that incurred that cost. An invoice usually details the period of time by which it must be paid.

You can also receipt stock using an invoice. An invoice stock receipt automatically creates an invoice for that creditor in your Portal records, and allows you to record additional information such as delivery fees and discounts.

Inter-branch transfers (IBT)

An inter-branch transfer is a transfer of stock from one site within a company to another.

Item

An item represents a good or service provided by your organisation. Items are added to transactions in order to sell or return them. An item will include information about its:

- Barcode.

  Note: An item can have more than one barcode.

- Description.
- Unit of measurement, for example an item may be sold by weight or as individual units.
- Price per unit of measurement.

Items also have additional information stored on the Portal, such as stock on hand, promotions and discount maximums.

Item options

Items can be modified with options to detail the customer's specific request. For example, a coffee order may contain soy milk or extra sugar. The options available for each item must be configured in the Portal.

Item variation

An item variation is an item that uses Fashion variations of colour, size and style. The default labels of colour, size and style may be renamed for your Portal configuration.

Journal

A journal is a unique code identifying a date, site and terminal for a transaction within the Portal.

Kit

A kit is an item that is made up of several other items in your inventory. The kit item itself does not have a stock-on-hand. Instead, when a kit item is sold, the stock-on-hand of the component items is decreased accordingly.

Label

A label is attached to an item and displays information about that item, such as the item's price, best before date and quantity, cooking or nutritional information, or a barcode. Labels can be printed via the Point of Sale.

Ledger

A ledger is a financial category or general ledger grouping that a transaction corresponds to for accounting purposes. For example, Expenses, Staff Salary, etc. The Portal uses a ledger for the Trail Balance Profit report. Your Portal may be configured not to use other ledgers.

Ledger type

A ledger type is a category or grouping of ledgers for accounting and reporting purposes, such as Income or Expenses. Your Portal may be configured not to use ledgers.

Line minimum

A line minimum is the minimum number of different items that must be in a transaction to trigger an effect, such as a promotion. Each unique item in a transaction creates its own line. Multiple units of the same item are recorded on the same line. A line minimum of 3 requires 3 unique items to be purchased.

Manufactured Kit

A manufactured kit is an item that is made up of several other items in your inventory. The kit item must be manufactured on site before it can be sold, and the stock-on-hand of the kit item is tracked by the Portal. When you manufacture a kit, the stock-on-hand of the component items is decreased and the stock-on-hand of the kit item is increased accordingly.

Matching

Matching is the process of linking a delivery docket receipt with a creditor invoice you have created in the Portal. Invoice-type stock receipts automatically create a creditor invoice and do not need to be matched.

Menu area

A menu area is a category of items designed to group items into meal types during table service. For example, coffees, mains, desserts. Menu areas control which modifier items can be applied to which prime items.

Modifier item

A modifier item is an item in your inventory that is used to add a modification to another item, such as adding 'soy milk' to a coffee. While modifier items can have costs and add to the price of the item they are modifying, they cannot be sold directly on the Point of Sale.

Open transaction

An open transaction is a transaction that has not yet been finalised. For example, a creditor invoice that has not been paid.

Operator

An operator is a staff member who uses the Point of Sale to process transactions or manage the cash drawer. Each operator is identified by a unique operator code and password that they use to log into the Point of Sale. Operator codes are unique to each site, but do not have to be unique within a company.

Pack

A pack represents the number of units that an item is supplied in. For example, you may sell cans of soft drink individually, but they are be ordered in packs of 24 from the supplier. This is different to a referral, where both the single can and the pack of cans are tracked in the inventory.

Pallet

A pallet is a set of cartons containing items that are grouped together as a specific collection so they can be tracked from supplier through to sale via barcodes. A pallet usually has a special barcode that encodes the number of cartons it contains, while each carton has a special barcode detailing the quantity of items it contains and their expiry dates.

Pallet barcodes may also be linked electronically to the carton barcodes.

Payment terms

Payment terms is the number of days after issuing an invoice that a creditor expects to be paid. Common payment terms are 21, 30, 60 or 90.

PDT

A PDT, or portable data terminal, is a small hand-held device with a touchscreen and an in-built scanner that can interact with the Portal to sell, order or count stock via the PDT software interface. PDTs are registered as terminals for a site, just as full Point of Sale terminals are, and require operators to log in to use them.

Portal Data Interchange (PDI)

The Portal Data Interchange (PDI) is a Portal feature that allows two separate companies that both use the AMC Convergent IT Portal to streamline their procurement process by automating the creation of customer orders and stock receipts between the companies.

Permission

A permission is a configuration that determines whether an operator is allowed to perform a specific task. For example, the ability to authorise purchase orders or change employee records may be restricted to certain individuals.

Portal operator

A Portal operator is someone with login credentials to your company's Portal. What a Portal operator can do depends on their permissions. A Portal operator cannot use their Portal login to log into the Point of Sale.

Point of Sale operator

A Point of Sale operator is someone with login credentials to your site's Point of Sale and PDTs. Depending on their permissions, they may have limited access to some Portal functionality through a PDT, but they cannot use their Point of Sale login to log into the Portal.

Point of Sale supervisor

A Point of Sale supervisor is a Point of Sale operator with some additional permissions to do things like authorise changes to the Point of Sale terminal, authorise gift voucher returns, or anything else that your Point of Sale configuration requires a supervisor's authorisation for. Their supervisor status is separate from any Portal permissions they may have. Depending on their permissions, they may have limited access to some Portal functionality through a PDT, but they cannot use their Point of Sale login to log into the Portal.

Price change

A price change updates the Portal with new prices for each price level of an item. Price changes can only be performed by operators with sufficient Portal privileges.

Price level

The Portal inventory system can store multiple price levels. For example, you may have one price level for retail customers and another for corporate or wholesale customers. The Point of Sale can be configured to use the appropriate price level when a debtor or customer is added to the transaction.

Prime item

A prime item is an item that can be sold normally through your Point of Sale. Most of the items in your inventory are likely to be prime items.

Procurement

The procurement system is the set of Portal features that manage and maintain the act of replenishing your stock levels, including managing creditors, contracts, requisitions, purchase orders, stock receipts, returns, adjustments and stock take.

Promotion

A promotion is a Portal feature which lets you create sophisticated rules to offer discounts, free items or rebates when the customer purchases a particular set of or combination of items. The Portal allows you to create promotions based on departments, suppliers, or your own custom item groups.

Promotion group

A promotion group is a group of items you define that either is used to trigger a promotion, or has the effects of the promotion applied to it. You can use the same group for multiple promotions.

Purchase order

A purchase order is a request to an individual supplier to purchase a set quantity of specific items. Purchase orders can be created manually, automatically created from finalised requisitions, or generated using procurement configurations.

Rebate

A rebate is an amount of money offered back to the customer by a supplier as an incentive to purchase. As opposed to a discount, special or promotion, where your company covers the lost profit from the price reduction, the supplier is responsible for reimbursing your company.

Rebate group

A rebate group is a collection of rebate item groups, used to easily control start and end dates of rebates.

Rebate item group

A rebate item group is a collection of rebate items, where each item has its rebate rules defined.

Receipt

A receipt is the printed record of a transaction, including the items, quantities and prices, any loyalty information, the tenders submitted and the operator, the terminal and date the transaction took place at.

Referral

A referral is a connection between two items in your inventory, where one is considered part of the other. For example, if your inventory tracks both individual cans of soft drink and crates of 24 cans, you can use a referral so that purchasing a single can (Selling item) depletes your stock of crates (Stock item) by 1/24th. This is different to using packs, as both individual cans and whole crates of items are tracked in your inventory.

Referred item

A referred item is an item that is depleted by the sale of another item. For example, if your inventory tracks both individual cans of soft drink and crates of 24 cans and sells the cans individually, the referred item is the crate of cans, which is depleted every time an individual can is sold. Referred items are also called Stock items in this documentation.

Requisition

A requisition is a list of items requested by a particular site. Each item is given a requested supplier, and all items are included in a single requisition, even if they are from different suppliers. Finalising a requisition can automatically open a purchase order for the appropriate suppliers. Requisitions from multiple sites may be combined into a group purchase order for a supplier, if your Portal is configured to permit group purchase orders.

Roster

A roster is a schedule of when specific staff members are supposed to work.

Sale minimum

A sale minimum is a minimum transaction amount used to trigger a promotion or other effect. For example, a sale minimum of $10 requires that at least $10 of items are purchased in a single transaction.

Selling item

A selling item is an item that uses a referral to track its stock levels on a different item. For example, if your inventory contains both individual cans of soft drink and crates of 24-cans, and your company sells the individual cans but tracks stock of the crates of 24 cans, then the individual can is the selling item.

Size

A size is one of the three item variation options under Fashion. An item with a designated style may have a colour defined, as well as a size. The terms colour size and style may be renamed for your Portal configuration.

> **Note:** This should not be confused with an item's size as defined in the Details tab of Inventory Maintenance, which details how units of an item should be measured and sold.

Snap count

A snap count is a record of the stock-on-hand of an item or set of items at the time of the snap count, as tracked by the Portal. Snap counts are used for calculations and reporting.

Special

A special is a temporary reduced price given to a specific item for a period of time. Where a promotion applies to a group of items, a special applies only to an individual item.

Stock adjustment / write-off

A stock adjustment is a record of increasing or decreasing an item's stock-on-hand, with a reason. For example, stock was found after stock take, or stock has been damaged.

Stock item

A stock item is an item that is referred to by another item, to track the stock-on-hand. For example, if your inventory contains both individual cans of soft drink and crates of 24-cans, and your company sells the individual cans but tracks stock of the crates of 24 cans, then the crate of 24 cans is the stock item.

Stock on hand

Stock on hand is the number of units of a particular item a site currently has. It is updated automatically by stock receipting, transfers, adjustments and sales, and compared against stock take numbers to determine shrinkage.

Stock receipt

A stock receipt is the process of recording stock incoming from a supplier to a site. Stock receipts record the supplier, date, item and quantities, including any items that were received but not ordered, or items that were listed but not delivered. Stock receipts may use a delivery docket, which is a plain record of incoming stock, or an invoice, which creates a corresponding creditor invoice in the Portal to link with the stock receipt.

Stock return

A stock return is the process of returning stock to a supplier because it is faulty or otherwise unsuitable for sale. Stock returns record the date, item and quantity being returned and the reason for each item being returned.

Stock take

A stock take is the process of counting all units of stock at a particular site to obtain an accurate stock-on-hand level. Stock takes can either be continuous, where stock is counted while the site is still open for trading, or manual, where all stock is counted in a single session while the site is closed for trading.

Style

A style is one of the three item variation options under Fashion. An item with a designated style may have a colour defined, as well as a size. The terms colour size and style may be renamed for your Portal configuration.

Supplier

A supplier is a creditor from whom you purchase items in your inventory.

Supplier promotion

A supplier promotion is a promotion that applies to all items marked as purchased from a specific supplier. A supplier promotion allows you to provide a discount or supplier rebate for the items purchased, either immediately or as a credit voucher. The promotion can be restricted to only provide a discount if a minimum number of items or minimum sale amount is reached.

Terminal

A terminal is the tablet or other device that runs the Point of Sale. Each terminal is connected to the site via the base station, and is identified by a unique terminal number, which is recorded in every transaction made by the terminal.

Point of Sale Transaction

A Point of Sale transaction is an exchange of items, which represent goods or services provided by your organisation, for payment. Transactions include all the relevant information about the exchange:

- The date, time, site and location of the transaction.
- The operator who performed the transaction, and which terminal they used.
- The items purchased or returned and in what quantities.
- The amounts and types of payments provided, including any change or reimbursement provided to the customer or redeemed loyalty points.

  > **Note:** Transactions cannot be finalised until they balance. That is, the amount owed by the customer is zero, and any amount that has been overtendered has been issued as change.

- The loyalty number linked to the transaction, if applicable.

You can view what is currently included in the transaction in the Transaction list of the Point of Sale.

> **Note:** In the Portal, a transaction also refers to an exchange of money, such as the payment of a creditor, or a debit adjustment.

Transaction line

A transaction line is an entry in the Transaction list that contains an item and its quantity. If more than one unit of an item is added to a transaction, the units are grouped into a single line. Actions such as price overrides, voids, discounts or refunds then apply to all units in the line.

Warehouse

A warehouse is a supplier that represents your company's central warehouse, used when sites order some or all of their inventory from Head Office rather than directly from external suppliers. You may configure different rules and restrictions for warehouse suppliers than are used for direct suppliers. You can also restrict sites to use only warehouse suppliers and prevent them from ordering from direct suppliers.