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## Inventory Maintenance

Inventory Maintenance

**Item: Standard 1** [Print Labels](#) [Keyboard](#)

|                          |            |                  |           |   |
|--------------------------|------------|------------------|-----------|---|
| Department for this Item | Standard   | Avg Cost         | \$0.00000 | <input checked="" type="checkbox"/> Tax |
| Item Number              | 01         | Price You Charge | \$1.00000 | <input type="checkbox"/> Tax 2          |
| Description              | Standard 1 | Price with tax   | \$1.07    | <input type="checkbox"/> Tax 3          |
| 2nd Description          |            | # In Stock       | 72        | <input type="checkbox"/> Bar Tax        |

Click to Select Picture

|               |                 |            |               |           |              |
|---------------|-----------------|------------|---------------|-----------|--------------|
| Optional Info | Pending Orders  | Properties | Notes         | Modifiers | Price Levels |
| Ordering Info | Special Pricing | Matrix     | Sales History | Recipe    | Printers     |

Options Additional Info

|              |                   |            |      |                |                                     |                 |                                     |
|--------------|-------------------|------------|------|----------------|-------------------------------------|-----------------|-------------------------------------|
| Bonus Points | 0                 | # Barcodes | 100  | Alternate SKUs | <input checked="" type="checkbox"/> | Tag Along Items | <input checked="" type="checkbox"/> |
| Commission   | % of Gross Profit |            | 0.0% |                | <input type="checkbox"/>            |                 | <input type="checkbox"/>            |

|           |                      |  |  |   |
|-----------|----------------------|--|--|---|
| Location  | <input type="text"/> | <input type="checkbox"/> Modifier Item           | <input type="checkbox"/> Exclude from Account Limit  | <input type="checkbox"/> Disable this Item  |
| Unit Size | Unit Type            | <input type="checkbox"/> Check ID Before Selling | <input type="checkbox"/> Check ID #2 Before Selling  | <input type="checkbox"/> Prompt Quantity    |
| 0         |                      | <input type="checkbox"/> Count This Item         | <input type="checkbox"/> Prompt Price                | <input type="checkbox"/> Allow Buyback      |
|           |                      |  | <input type="checkbox"/> Auto-Weigh                  | <input type="checkbox"/> Use Serial/Batch # |
|           |                      |  | <input checked="" type="checkbox"/> Print on Receipt | <input type="checkbox"/> Special Permission |

Search by Item Number Profit% 0% Retail Discount 0% Gross Margin 100.0%

← PreviousLook upNext →

? Help

Add ItemSaveTransferInstant PO

DuplicateDeleteExit

The **Inventory Maintenance** screen is where you set up all the items and services that your business sells, each item or service may have dozens of different options that can be configured at this screen.

Each item or service will need to be created and then configured at this screen before you can sell it, rent it, return it or receive the product or service into your store or restaurant.

## TABLE OF CONTENTS

|   |                  |
|---|------------------|
| <b><u>INVENTORY MAINTENANCE SCREEN: OVERVIEW</u></b>                            | <b><u>5</u></b>  |
| <b><u>INVENTORY MAINTENANCE SCREEN: DESCRIPTION &amp; EXAMPLE INVENTORY</u></b> | <b><u>7</u></b>  |
| <b><u>INVENTORY MAINTENANCE SCREEN: NAVIGATION</u></b>                          | <b><u>8</u></b>  |
| <b><u>INVENTORY MAINTENANCE SCREEN: BREAKDOWN</u></b>                           | <b><u>9</u></b>  |
| <b><u>DEPARTMENT FOR THIS ITEM</u></b>  | <b><u>12</u></b> |
| <b><u>PIZZA SETUP</u></b>   | <b><u>13</u></b> |
| <b><u>DELETE</u></b>  | <b><u>14</u></b> |
| <b><u>INSTANT PO</u></b>  | <b><u>16</u></b> |
| <b><u>ADD ITEM</u></b>  | <b><u>17</u></b> |
| <b><u>STANDARD ITEM</u></b>   | <b><u>18</u></b> |
| <b><u>STANDARD ITEM: SCREEN BREAKDOWN</u></b>                                   | <b><u>19</u></b> |
| <b><u>STANDARD ITEM: OPTIONAL INFO – OPTIONS TAB</u></b>                        | <b><u>23</u></b> |
| <b><u>STANDARD ITEM: OPTIONAL INFO – ADDITIONAL INFO TAB</u></b>                | <b><u>26</u></b> |
| <b><u>STANDARD ITEM: PENDING ORDERS</u></b>                                     | <b><u>28</u></b> |
| <b><u>STANDARD ITEM: PROPERTIES</u></b>   | <b><u>29</u></b> |
| <b><u>STANDARD ITEM: NOTES</u></b>  | <b><u>30</u></b> |
| <b><u>STANDARD ITEM: MODIFIERS</u></b>  | <b><u>31</u></b> |
| <b><u>ADD MODIFIER GROUP</u></b>  | <b><u>32</u></b> |
| <b><u>ADD MODIFIER</u></b>  | <b><u>33</u></b> |


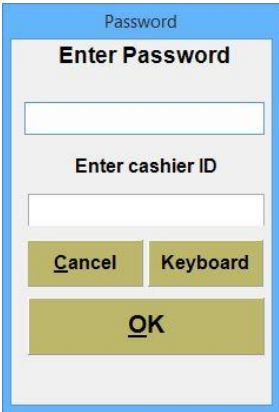
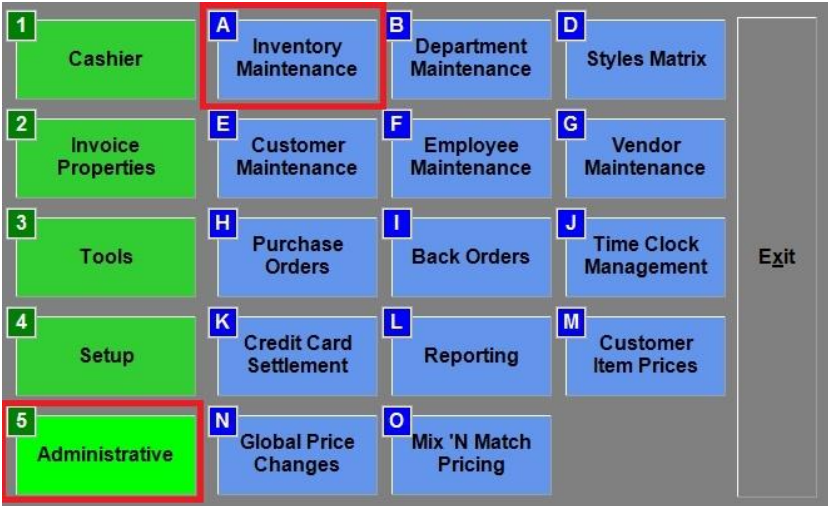
|                                       |           |
|---------------------------------------|-----------|
| <b>STANDARD ITEM: PRICE LEVELS</b>    | <b>34</b> |
| <b>STANDARD ITEM: ORDERING INFO</b>   | <b>35</b> |
| <b>STANDARD ITEM: SPECIAL PRICING</b> | <b>36</b> |
| <b>STANDARD ITEM: MATRIX/RENTAL</b>   | <b>38</b> |
| <b>MATRIX</b>                         | <b>38</b> |
| <b>RENTAL</b>                         | <b>39</b> |
| <b>STANDARD ITEM: SALES HISTORY</b>   | <b>40</b> |
| <b>STANDARD ITEM: RECIPE</b>          | <b>41</b> |
| <b>PREPARE BATCH</b>                  | <b>42</b> |
| <b>STANDARD ITEM: PRINTERS</b>        | <b>43</b> |
| <b>CHOICE ITEM</b>                    | <b>44</b> |
| <b>MODIFIER GROUP</b>                 | <b>45</b> |
| <b>COUPON ITEM</b>                    | <b>46</b> |
| <b>RESTRICTIONS</b>                   | <b>47</b> |
| <b>COMBO (KIT) ITEM</b>               | <b>48</b> |
| <b>SELLING COMBO/KIT ITEMS</b>        | <b>50</b> |
| <b>OTHER OPTIONS:</b>                 | <b>50</b> |

## Revision History

| Document Version | Date         | Author | Description of Changes  |
|------------------|--------------|--------|---|
| 1.0              | Oct 1, 2009  | R H    | 1st Release   |
| 2.0              | Oct 1, 2009  | R H    | Updated table of contents, included descriptions of added features  |
| 3.0              | Oct 10, 2012 | R H    | Added the never print in kitchen feature explanation  |
| 4.0              | Feb 28, 2013 | R H    | Update Price levels page to show discount levels instead of price levels  |
| 5.0              | Apr 23, 2013 | T R    |   |
| 6.0              | Nov 30, 2015 | M P    | Updated format for document, changed header   |
| 7.0              | Jan 10, 2017 | M P    | Updated description for Prompt invoice notes  |
| 8.0              | Jun 9, 2017  | M P    | Includes screenshots of additional tax rates from 12..8016  |
| 9.0              | Jul 17, 2017 | M P    | Ordering Info tab includes a description of changes made in Patch 12.8019   |
| 10.0             | Aug 17, 2017 | M P    | Barcoded and Sold by Piece option added to Additional Info tab descriptions, added in release <a href="#">12.8021</a> |

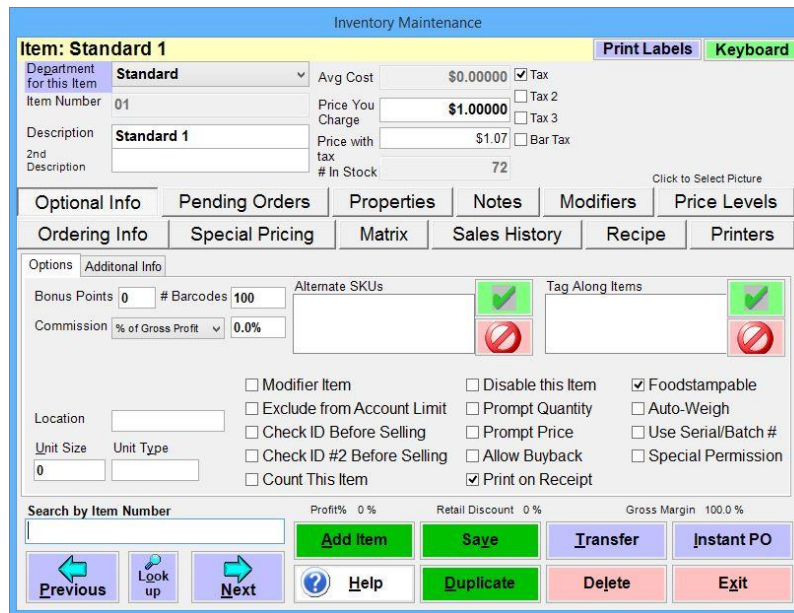
## Inventory Maintenance Screen: Overview

To access the Inventory Maintenance screen, follow the steps below.

|   |   |
|---|---|
|  <p>The image shows two buttons: a yellow button labeled "Manager" and a blue button labeled "Options".</p>  | <ol style="list-style-type: none"><li>1. Select the blue <b>Option</b> or yellow <b>Manager</b> button</li></ol>  |
|  <p>The image shows a password entry screen with the following fields and buttons:</p> <ul style="list-style-type: none"><li>Label: Password</li><li>Field: Enter Password</li><li>Field: Enter cashier ID</li><li>Buttons: Cancel, Keyboard, OK</li></ul>  | <ol style="list-style-type: none"><li>2. Enter the administrator credentials or the credentials of an Employee that has access to the Options/Manager menu.</li></ol> |
|  <p>The image shows a main menu screen with various options. The options are arranged in a grid:</p> <ul style="list-style-type: none"><li>Row 1: 1 Cashier, A Inventory Maintenance, B Department Maintenance, D Styles Matrix</li><li>Row 2: 2 Invoice Properties, E Customer Maintenance, F Employee Maintenance, G Vendor Maintenance</li><li>Row 3: 3 Tools, H Purchase Orders, I Back Orders, J Time Clock Management</li><li>Row 4: 4 Setup, K Credit Card Settlement, L Reporting, M Customer Item Prices</li><li>Row 5: 5 Administrative, N Global Price Changes, O Mix 'N Match Pricing</li></ul> <p>An "Exit" button is located on the right side of the screen. The "Administrative" button (5) and the "Inventory Maintenance" button (A) are highlighted with red boxes.</p> | <ol style="list-style-type: none"><li>3. Select [5] Administrative then [A] <b>Inventory Maintenance</b></li></ol>  |



You can Access the Inventory Maintenance Screen right from the retail screen by pressing the **F2** key or by clicking the **Inventory** toolbar button. **\*\*\*Note: If you are logged in as an employee that does not have Access to the Inventory Maintenance screen, you will be prompted to enter the credentials of an employee that has permission.**



This is a touch-screen friendly screen, meaning to modify any field you can either type, single touch and touch the keyboard button, or double touch to bring up the on screen keyboard.

In CRE\RPE, there are five types of items. For more information on the types of items that can be created please see: [Add Item](#)

## Inventory Maintenance Screen: Description & Example Inventory

### Why do we have so many options?

- **Flexibility** – Businesses invent all sorts of ways to sell their wide array of products and services. Your inventory can be configured to meet specific needs that your business provides to your customers when ordering and most importantly, at the time of sale.
- **Ease of Selling** – Your business is in place above all, for performing sales. The available options can be set to make the selling aspect of your establishment fast and easy for your cashiers and servers. Sale prices can be pre-set and automatically calculated, with cashier simply scanning bar codes. A steak dinner can be set up to walk your servers through a series of questions, leaving no room for mistakes on the customer's order.

### The following are a few examples of items for different industries:

- A bottle of soda is an example of a bar-coded **Standard Item** (retail). The UPC barcode is provided directly on the label from the manufacturer, and is a common example for any retail store that sells items that get delivered to them with pre-printed barcodes.
- A corkscrew is an example of a **Standard Item** commonly carried by liquor stores, which does not have a barcode on it. For this sort of item, you will make up your own item number and have the option of either printing a barcode to put on the product, or selling it using TS lookup from the invoice screen.
- A steak is an example of a **Standard Item** that a restaurant would sell. When a steak is sold, it is usually modified to include meat temperature, sides, etc. These modifiers are also set up in the Inventory Maintenance screen.
- A **Modifier Item** is an item used to modify other items. For a steak, you can modify it to be extra rare, rare, medium, etc. In this example, the temperatures are created as modifier items, and are later attached to the steak. Retail stores often use modifiers to detail a service, or prompt their cashiers to up sell additional products.
- A movie is an example of a **Rental Item** that a video store would rent. Even though most movies come with a UPC number from the manufacturer however, most video stores put on their own bar code so they can track the items individually.
- **Check Cashing Fee** is an example of a **Non-Tangible Service** that your business may offer. Services are set up as items and can be sold on an invoice along with other retail or food products (ex: oil change may include labor, oil and windshield wiper replacements.)

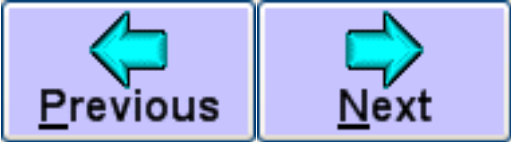





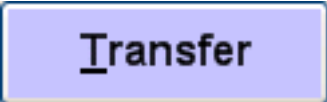
## Inventory Maintenance Screen: Navigation



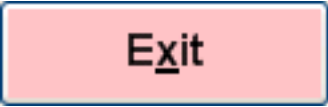
- The 'Inventory Maintenance ' screen displays one item at a time.
  - The screen itself is broken down into three horizontal sections (the bottom broken up into two blocks)
  - The top section (titled 'General Information for \_\_\_\_\_') holds the general information needed for every item. If you want to create a quick, basic inventory you can add each item and fill in only General Information for the item.
  - The middle section holds the optional information for the current item. For a standard item, it holds a number of tabs of information.
  - The bottom left section is used to navigate between different items.
    - The slowest way is to either next or previous through the items one by one.
    - The [Search By Item Number](#) box allows you a quick way to locate an item by its UPC bar code or item number.
    - If you **double click** where it says **Search by Item Number**, it will change to **Search by Item Number-sorted by name**. This will change how the **Next** and **Previous** buttons bring up the next item. They will now bring up the items in **Alphabetical Order** of the item's **Description**.
    - The lookup button brings you to a much more detailed search screen, providing a quick and easy way to find any item in inventory.
  - The bottom right section is used to add new items, save changes that you made and perform other inventory options. The buttons are described in detail below.



## Inventory Maintenance Screen: Breakdown

|  |   |
|--|---|
| <p>Department<br/>for this Item</p>  | <p><b>Department for this Item</b> - Selecting this button will bring you to the <a href="#">Department Maintenance</a> window. Next to this button you can use the dropdown to select the department that has been created to group this item in.</p>  |
| <p>Pizza Setup</p>   | <p><b>Pizza Setup</b> - Selecting this button will bring you to the <a href="#">Pizza Setup</a> window.</p>   |
| <p>Print Labels</p>  | <p><b>Print Labels</b> - Selecting this button will bring you to the Barcode Express window, where barcode labels can be printed.</p> <p>For more information on printing barcodes please see the following document:</p> <ul style="list-style-type: none"> <li>• <a href="http://faq.pcamerica.com/file-lockers/pdf-locker/Barcode_Express.pdf">http://faq.pcamerica.com/file-lockers/pdf-locker/Barcode_Express.pdf</a></li> </ul> |
| <p>Keyboard</p>  | <p><b>Keyboard</b> - Selecting this button will display the on screen keyboard. This is used by selecting the field you would like to enter text into and then selecting the Keyboard button where you will be able to type the information in.</p>   |
| <p>Search by Item Number</p> <input data-bbox="121 1352 789 1415" type="text"/>                | <p><b>Search by Item Number</b> – There are two ways to enter information into this field which will open the inventory item to be edited:</p> <ol style="list-style-type: none"> <li>1. Type in the item number to be edited.</li> <li>2. Scan the barcode of the item to be edited. This requires the use of a compatible barcode scanner.</li> </ol>   |
| <p>Search by Item Number-sorted by name</p> <input data-bbox="188 1692 721 1755" type="text"/> | <p><b>Search by Item Number-sorted by name</b> – If you <b>double click</b> where it says <b>Search by Item Number</b>, it will change to <b>Search by Item Number-sorted by name</b>. This causes the <b>Next</b> and <b>Previous</b> buttons to cycle through the inventory by <b>Alphabetical Order</b> of the item's <b>Description</b> as opposed to the <b>Item Number</b>.</p>   |

|   |  |
|---|--|
|  <p>The image shows two light blue buttons with rounded corners. The left button has a cyan arrow pointing left and the text 'P<u>revious</u>'. The right button has a cyan arrow pointing right and the text 'N<u>ext</u>'.</p> | <p>Use the <b>Previous</b> and <b>Next</b> buttons to cycle through the inventory that is being displayed.</p>   |
|  <p>The image shows a light blue button with rounded corners. It features a magnifying glass icon above the text 'L<u>ook</u><br/>u<u>p</u>'.</p>  | <p><b>Look up</b> – This button will bring you to the Inventory Lookup Window.</p>   |
|  <p>The image shows a green button with rounded corners and a thin black border. It contains the text 'A<u>dd</u> Item' in black.</p>  | <p><b>Add Item</b> – This button will allow you to create new inventory in your database.</p>  |
|  <p>The image shows a light blue button with rounded corners and a thin black border. It features a question mark icon in a circle on the left and the text 'H<u>elp</u>' on the right.</p>                                      | <p><b>Help</b> – this option will display the CRE/RPE help section. The help section can also be brought up by selecting F1 on your keyboard.</p>  |
|  <p>The image shows a green button with rounded corners and a thin black border. It contains the text 'S<u>ave</u>' in black.</p>  | <p><b>Save</b> – This button will save any changes made to the inventory item.</p>   |
|  <p>The image shows a green button with rounded corners and a thin black border. It contains the text 'D<u>uplicate</u>' in black.</p>   | <p><b>Duplicate</b> – This button will duplicate the current item. The item number will either add a number at the end (if the item number is text) or increase the value of the last digit by 1 number. The price, cost, number in stock and the selected tax will also be applied to the new item. After selecting this option you will be asked what type of item to duplicate the original as, the same question that is displayed when selecting Add Item.</p>  |
|  <p>The image shows a light blue button with rounded corners and a thin black border. It contains the text 'T<u>ransfer</u>' in black.</p>   | <p><b>Transfer</b> – This button will open the Transfer Items window, this feature is used when multiple stores are being used over the Web Portal connection method.</p> <p>This feature is only used for enterprise locations utilizing the pcAmerica web portal. For more information on using this feature please see:</p> <ul style="list-style-type: none"> <li>• <a href="http://faq.pcamerica.com/file-lockers/pdf-locker/POS_Portal_Usage_Guide.pdf">http://faq.pcamerica.com/file-lockers/pdf-locker/POS Portal Usage Guide.pdf</a></li> </ul> |

|  |   |
|--|---|
| <div data-bbox="293 142 618 247" style="text-align: center;">  </div> | <p><b>Delete</b> – This button will remove the item from the visible inventory.</p>             |
| <div data-bbox="293 352 618 457" style="text-align: center;">  </div> | <p><b>Instant PO</b> - This option will allow you add and remove stock from your inventory.</p> |
| <div data-bbox="293 573 618 678" style="text-align: center;">  </div> | <p><b>Exit</b> - This button will exit from the inventory maintenance screen.</p>               |

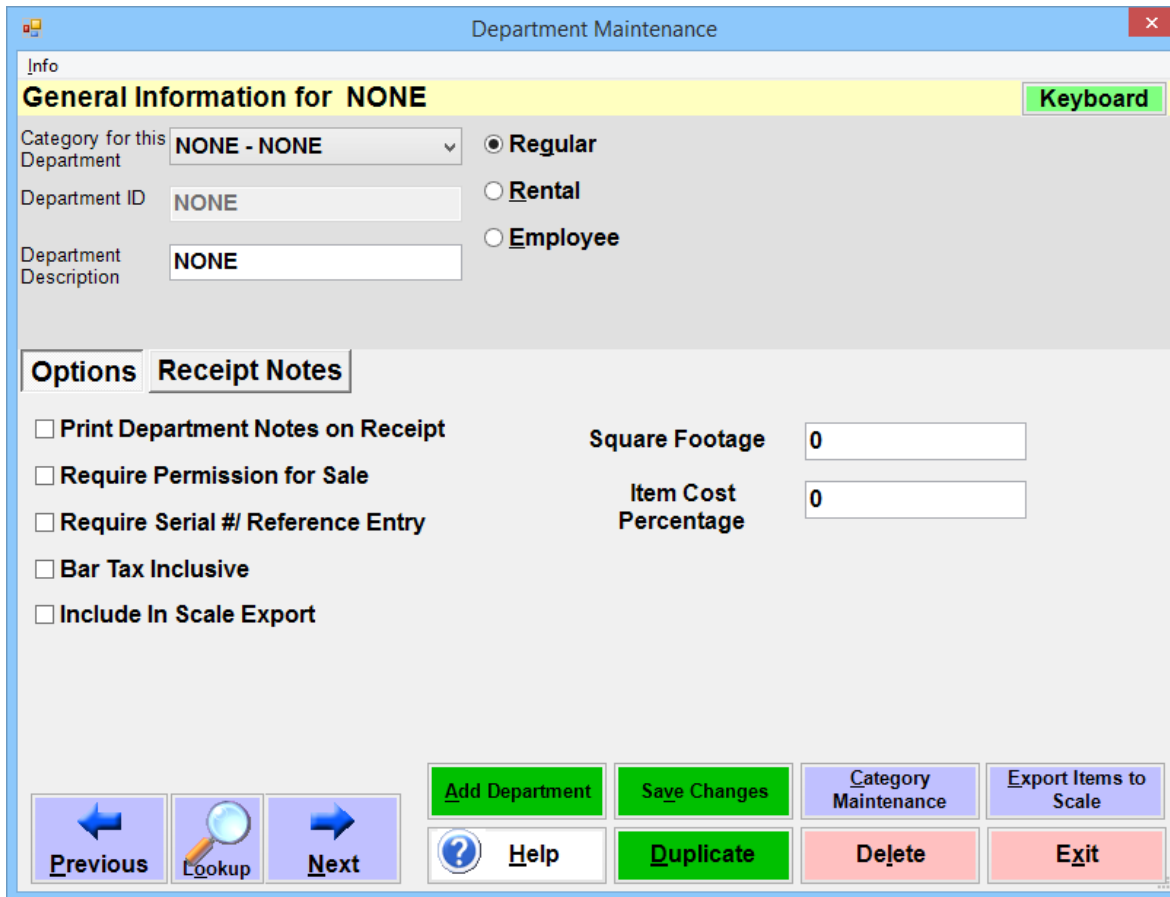
Profit% 100.0 %     
 Retail Discount 20.0 %     
 Gross Margin 50.0 %

Above the buttons on the bottom of the inventory maintenance screen you will find information about the item that is on the screen including;

- **Profit** - This value is a calculated percent of what the profit earned for this item is, based on what is entered in the (average) cost and Price you charge for the item.
- **Retail Discount** – This value is a calculated percent of the discount that is given to customers based on what is entered in the Retail Price and the Price you charge.
- **Gross Margin** – This value is a calculated percent of what the Gross Margin is, based on what is entered for the (average) cost and Price you charge for the item.

## Department for this Item

The Department maintenance window is where inventory can be grouped together.



The screenshot shows a software window titled "Department Maintenance". The window has a blue title bar with a close button (X) in the top right corner. Below the title bar, there is a tab labeled "Info". The main content area is titled "General Information for NONE" and includes a "Keyboard" button in the top right. The form contains the following fields and options:

- Category for this Department: NONE - NONE (dropdown menu)
- Department ID: NONE (text input)
- Department Description: NONE (text input)
- Radio buttons for selection: Regular (selected), Rental, Employee
- Options tab: Contains checkboxes for "Print Department Notes on Receipt", "Require Permission for Sale", "Require Serial #/ Reference Entry", "Bar Tax Inclusive", and "Include In Scale Export".
- Receipt Notes tab: Contains input fields for "Square Footage" (value: 0) and "Item Cost Percentage" (value: 0).

At the bottom of the window, there is a toolbar with several buttons: "Previous" (blue arrow left), "Lookup" (magnifying glass icon), "Next" (blue arrow right), "Add Department" (green), "Save Changes" (green), "Category Maintenance" (blue), "Export Items to Scale" (blue), "Help" (blue question mark icon), "Duplicate" (green), "Delete" (red), and "Exit" (red).

Stores and restaurants can carry anywhere from a few dozen items to tens of thousands of items. Regardless of how many inventory and menu items your business sells, it is useful to break your items down into smaller groups of items to perform a certain task or search. In CRE\RPE, items can be grouped into **Departments**. Departments can be further grouped into Categories.

For more information on Departments please see the following document:

- [http://faq.pcamerica.com/file-lockers/pdf-locker/Department\\_Maintenance.pdf](http://faq.pcamerica.com/file-lockers/pdf-locker/Department_Maintenance.pdf)

## **Pizza Setup**

You will be able to create any variation of pizza, any size, with any toppings and multiple crusts. You will also be able to have your standard pizza's programmed into your menu for quick access.

Note: You can also print pizza labels which can be printed and placed on the outside of the pizza box, helping organize your pizza delivery orders.

For more information on printing pizza labels please see following document:

- [http://faq.pcamerica.com/file-lockers/pdf-locker/Pizza\\_Setup.pdf](http://faq.pcamerica.com/file-lockers/pdf-locker/Pizza_Setup.pdf)

\*It is recommended to create a Pizza department and add your pizza's to this department. \*

Before doing any configuration on the pizza itself we must first create all the properties for the pizza including: Sizes, Crusts and Toppings.

**Size** - Setup Sizes by selecting the **Sizes** tab. Select the **add (+)** button and enter a **Description, Number** and **Name** (e.g. Small, Large).

**Crusts** - Create crusts by selecting the **Crusts** tab. Select the **add (+)** tab and enter a **Description, Number** and **Name** (e.g. Sicilian, Stuffed, Deep Dish).

**Toppings** - Setup the Toppings by selecting the **Toppings** tab and select the **add (+)** button. Enter a **Description, Number** and **Name** (e.g. Peppers, Sausage).

When you have created your standard pizzas for your menu you must enter a price for each size that they come in. In addition, you must enter a price for the different crusts that they can come with.

Select the **Pizza Name** and then select the **Edits** button. After you have setup the sizes and crusts a grid will appear for you to enter the correct prices. In addition, you can setup the toppings for that pizza by selecting the **Setup This Pizza's Toppings** button.

To access additional features select **Manager/Options** (entering the administrator password where applicable) select **Setup** and then **Setup Screen** under the **Restaurant Features** tab, select the **Pizza** tab

By default, you will be able to select a pizza by halves however you can change it to quarters or whole. There is also a Pizza Regions Multiplier so you can adjust the cost of your toppings. For instance, a topping that costs \$2.00 can be adjusted to \$1.00 if it is ordered on 1 half of the pizza.

When you select a pizza from your menu you can easily choose a size, crust and toppings. You can also designate certain areas of the pizza to have specific toppings on it.


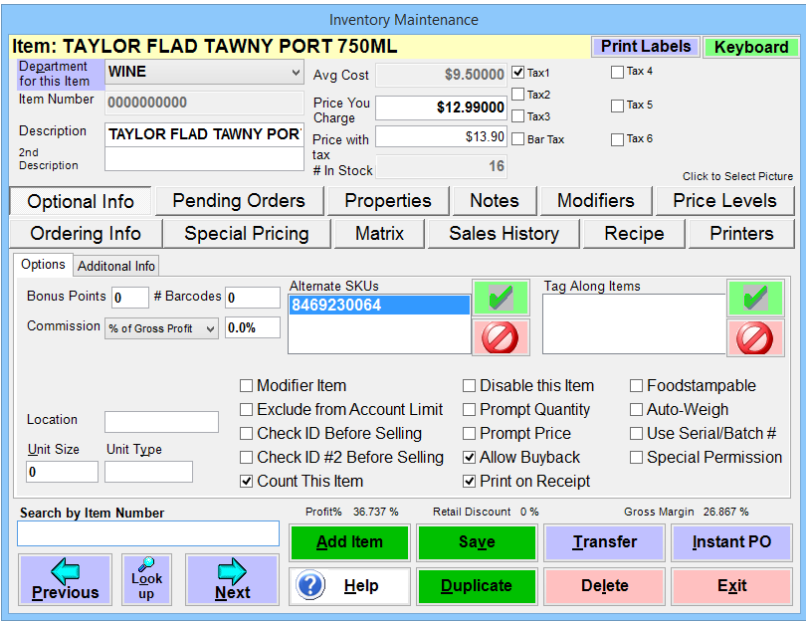
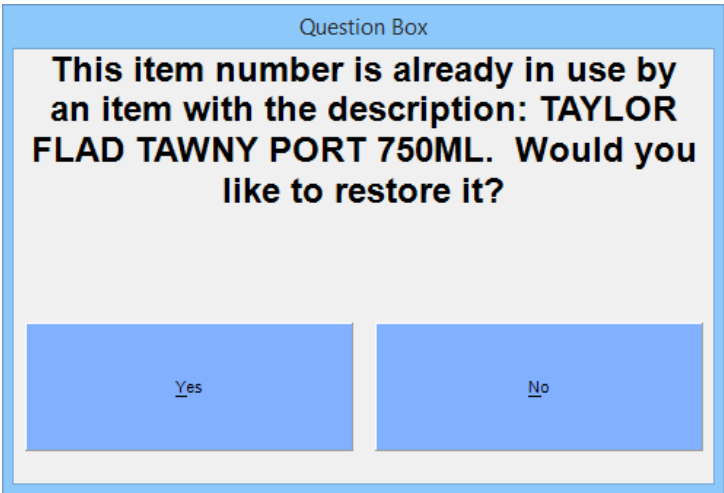
For a more detailed guide of creating pizzas please see the link below:

- [http://faq.pcamerica.com/file-lockers/pdf-locker/Pizza\\_Setup.pdf](http://faq.pcamerica.com/file-lockers/pdf-locker/Pizza_Setup.pdf)

## Delete

When inventory is deleted from CRE/RPE, it will not be removed from the database. As a preventative measure, all inventory will not be deleted due to the fact that inventory is associated with invoices, however the items can be re-used in the case that the inventory was created incorrectly.

If this is the case (item was created incorrectly in inventory maintenance) or, was deleted by accident you can re-use the item number by following these steps:

|   |  |
|---|--|
|    | <ol style="list-style-type: none"><li>1. Select <b>Add Item</b>.</li></ol>   |
|   | <ol style="list-style-type: none"><li>2. Enter the Item Number of the Item that was previously deleted.</li><li>3. Select another field to input information (such as the Description field).</li></ol>                          |
|  | <ol style="list-style-type: none"><li>4. You should then be prompted that the item number is already in use. It will also display the description that the item has.</li><li>5. Select <b>Yes</b> to restore the item.</li></ol> |

Question Box

**What type of item would you like to add?**


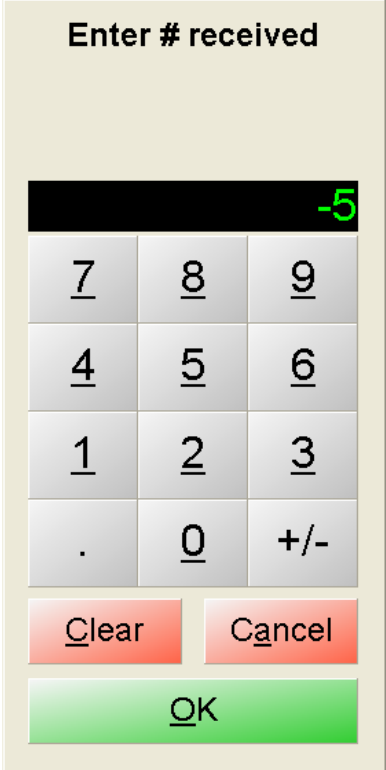
|                      |                    |                       |
|----------------------|--------------------|-----------------------|
| <u>Standard Item</u> | <u>Choice Item</u> | <u>Modifier Group</u> |
| <u>Coupon</u>        | <u>Kit</u>         |                       |

6. Select the type of item you would like to restore the item as.
7. Continue adding the item as normal.

## Instant PO

Instant Purchase Orders are a way to instantly increase and/or decrease the number of inventory in stock. This is usually done to correct errors when inventory counts and edits are performed.

After selecting Instant PO you will be asked the following:

|  |  |
|--|--|
|   | <ol style="list-style-type: none"><li>1. You will be prompted for the reason for the adjustment of the stock level.</li><li>2. After entering the reason for the stock level adjustment select <b>Enter</b>.</li></ol>   |
|  | <ol style="list-style-type: none"><li>3. Enter the number of items received:<ul style="list-style-type: none"><li>• Entering a positive number (i.e. 5) will add to the existing number of stock.</li><li>• Entering a negative number (i.e. -5) will subtract from the existing number of stock.</li></ul></li><li>4. When done select <b>OK</b>.</li></ol> |



## Add Item

Question Box

**What type of item would you like to add?**

|                               |                             |                                |
|-------------------------------|-----------------------------|--------------------------------|
| <a href="#">Standard Item</a> | <a href="#">Choice Item</a> | <a href="#">Modifier Group</a> |
| <a href="#">Coupon</a>        | <a href="#">Kit</a>         |                                |

- [Standard Item](#)
- [Choice Item](#)
- [Modifier Group](#)
- [Coupon](#)
- [Combo](#)


## Standard Item

A **Standard Item** is any item that you sell or rent. This includes retail items scanned at the register, food sold in a restaurant and services offered a charge to your customers.

The screenshot shows the 'Inventory Maintenance' window for an item named 'Candy Bar'. The interface includes a header with 'Print Labels' and 'Keyboard' buttons. The main form contains fields for 'Department for this Item' (NONE), 'Item Number' (789845678), 'Description' (Candy Bar), 'Avg Cost' (\$1.00000), 'Price You Charge' (\$2.00), 'Price with tax' (\$2.18), and '# In Stock' (20). There are also checkboxes for 'Tax', 'Tax 2', 'Tax 3', and 'Bar Tax'. Below the main form are several tabs: 'Optional Info', 'Pending Orders', 'Properties', 'Notes', 'Modifiers', 'Price Levels', 'Ordering Info', 'Special Pricing', 'Matrix', 'Sales History', 'Recipe', and 'Printers'. The 'Optional Info' tab is active, showing 'Options' and 'Additional Info' sections. The 'Options' section includes 'Bonus Points' (0), '# Barcodes' (20), 'Alternate SKUs' (checked), and 'Tag Along Items' (checked). The 'Additional Info' section includes 'Commission' (% of Gross Profit, 0.0%), 'Location', 'Unit Size' (0), and 'Unit Type'. There are also several checkboxes for item properties like 'Modifier Item', 'Exclude from Account Limit', 'Check ID Before Selling', 'Count This Item', 'Disable this Item', 'Prompt Quantity', 'Allow Buyback', 'Print on Receipt', 'Foodstampable', 'Auto-Weigh', 'Use Serial/Batch #', and 'Special Permission'. At the bottom, there is a 'Search by Item Number' field and a row of buttons: 'Add Item', 'Save', 'Transfer', 'Instant PO', 'Previous', 'Look up', 'Next', 'Help', 'Duplicate', 'Delete', and 'Exit'. The 'Profit%' is 100.0%, 'Retail Discount' is 0%, and 'Gross Margin' is 50.0%.

## Standard Item: Screen Breakdown

|   |  |
|---|--|
| <p>Department for this Item</p> <p>NONE</p> | <ul style="list-style-type: none"><li>• <b>Department for this Item:</b> This allows you to select a department for the inventory item. Select the dropdown menu to scroll through the Department list, highlight the desired department to select it.</li></ul> <p>You can quickly access the Department Maintenance screen by selecting <b>Department for this Item</b>.</p>   |
| <p>Item Number</p> <p>789845678</p>         | <ul style="list-style-type: none"><li>• <b>Item Number:</b> This is where you enter the unique identifier for an item. It can be up to 20 characters long and consist of any combination of letters and numbers.<ul style="list-style-type: none"><li>○ Most retail products come with a UPC barcode already on them – you should either enter this number using your keyboard or simply scan the barcode using a barcode scanner.</li><li>○ For food items in a restaurant, you may want to make the item number a shorter version of the description.</li></ul></li></ul> <p>Do not use any punctuation or spaces as part of the item number.</p> <p><b>NOTE:</b> Sometimes, barcode scanners come configured to not scan all of the numbers on the barcode. Make sure the number that is read with your barcode scanner, and the item number you enter for Item Number, are the same.</p>   |
| <p>Description</p> <p>Candy Bar</p>         | <ul style="list-style-type: none"><li>• <b>Description:</b> This is the description of the item that will appear on receipts, invoices, reports and kitchen printouts. It can be up to 30 characters long.<ul style="list-style-type: none"><li>○ The Second Description line (the line under description), also has a 30 character limit, and appears in a more limited fashion on some reports. It can consist of any upper and lower case letters, numbers, most punctuation, or spaces.</li></ul></li></ul> <p><b>NOTE:</b> Do not use the asterisk (*) or apostrophe (') as part of the item name.</p> <p><b>NOTE:</b> Only the first description appears on the standard 3" receipt.</p> <p><b>NOTE:</b> For restaurants, you can have the second line of description print to the kitchen, please see the option <b>Substitute Second Description to Kitchen Receipts</b>. Some restaurants prefer to send an abbreviated version to the kitchen and still print a full description for the customer receipt.</p> |

|  |  |
|--|--|
| <p>Avg Cost <input type="text" value="\$1.00000"/></p>   | <ul style="list-style-type: none"> <li>• <b>Cost (Avg Cost):</b> This is how much the item cost you when you purchased it from your vendor. <ul style="list-style-type: none"> <li>a. CRE\RPE supports two types of cost calculations based on what is selected for <b>Average Cost Method</b>: <ul style="list-style-type: none"> <li>i. Average Cost calculation method, where the cost is calculated based on what has been paid for it on purchase orders and instant purchase orders (Average Cost Method - Enabled).</li> <li>ii. Manual Cost method, where the cost is manually changed by typing in the amount here (Average Cost Method - Disabled).</li> </ul> </li> </ul> </li> </ul> |
| <p>Price You Charge <input type="text" value="\$2.00"/></p>  | <ul style="list-style-type: none"> <li>• <b>Price You Charge:</b> This is how much you are selling the item for to a standard customer. Any sales and specials you set up will override this price see: <p><a href="http://faq.pcamerica.com/file-lockers/pdf-locker/Special_Pricing.pdf">http://faq.pcamerica.com/file-lockers/pdf-locker/Special_Pricing.pdf</a></p> </li> </ul>   |
| <p>Price with tax <input type="text" value="\$2.18"/></p>  | <ul style="list-style-type: none"> <li>• <b>Price with Tax:</b> The price with tax field will display the cost of the item with total calculated tax included. This is dependent on what <a href="#">Tax Rates</a> are selected for this item.</li> </ul>  |
| <p># In Stock <input type="text" value="20"/></p>  | <ul style="list-style-type: none"> <li>• <b>In Stock:</b> This displays the number of inventory that is currently in stock for this item. It is automatically updated after an invoice, purchase orders and instant purchase orders.</li> </ul>  |
| <p> <input checked="" type="checkbox"/> Tax      <input type="checkbox"/> Tax 4<br/> <input type="checkbox"/> Tax 2      <input checked="" type="checkbox"/> Tax 5<br/> <input type="checkbox"/> Tax 3      <input checked="" type="checkbox"/> Tax 6<br/> <input type="checkbox"/> Bar Tax </p> | <ul style="list-style-type: none"> <li>• <b>Tax Rates:</b> This indicates which tax rates should be charged to this item. Select the check-box next to the desired tax rate(s) to choose the type of tax to be applied to this item. You can assign any combination of tax rates.</li> </ul> <p>For information on configuring tax rates please see:</p> <p><a href="http://faq.pcamerica.com/file-lockers/pdf-locker/Tax_Rates.pdf">http://faq.pcamerica.com/file-lockers/pdf-locker/Tax_Rates.pdf</a></p>  |
| <p></p>   | <ul style="list-style-type: none"> <li>• <b>Select Picture:</b> To choose a picture, select above <b>Click to Select Picture</b> and choose a picture file from your computer.</li> </ul> <p><b>NOTE:</b> If used on a network, make sure the picture file is in a shared location that all computers have access to.</p>  |











|                      |                 |            |               |           |              |
|----------------------|-----------------|------------|---------------|-----------|--------------|
| <b>Optional Info</b> | Pending Orders  | Properties | Notes         | Modifiers | Price Levels |
| Ordering Info        | Special Pricing | Matrix     | Sales History | Recipe    | Printers     |

There are 12 tabs of options for Standard Items that can be configured, please make a selection below for a breakdown of each tab and each option:

- [Standard Item: Optional Info – Options tab](#)
- [Standard Item: Optional Info – Additional Info tab](#)
- [Standard Item: Pending Orders](#)
- [Standard Item: Properties](#)
- [Standard Item: Notes](#)
- [Standard Item: Modifiers](#)
  - [Add Modifier Group](#)
  - [Add Modifier](#)
- [Standard Item: Price Levels](#)
- [Standard Item: Ordering Info](#)
- [Standard Item: Special Pricing](#)
- [Standard Item: Matrix/Rental](#)
  - [Matrix](#)
  - [Rental](#)
- [Standard Item: Sales History](#)
- [Standard Item: Recipe](#)
  - [Prepare Batch](#)
- [Standard Item: Printers](#)

## Standard Item: Optional Info – Options tab

|  |  |
|--|--|
| <p>Bonus Point <input type="text" value="0"/></p>  | <p>This field should contain the number of bonus points earned when the item is purchased.</p> <p>Bonus points are used to offer customers loyalty incentives.</p> <p>Refer to the following document for more information:</p> <ul style="list-style-type: none"> <li>• <a href="http://faq.pcamerica.com/file-lockers/pdf-locker/Customer_Loyalty_Detailed.pdf">http://faq.pcamerica.com/file-lockers/pdf-locker/Customer_Loyalty_Detailed.pdf</a></li> </ul>  |
| <p># Barcodes <input type="text" value="0"/></p>   | <p>This field should contain the number of barcodes for the item that should be printed in Barcode Express.</p>  |
| <p>Commission <input type="text" value="% of Gross Profit"/> <input type="text" value="0.0%"/></p>   | <p>Here you decide whether or not a commission can be earned from the sale of the item and how the commission should be calculated.</p> <p>Refer to the following documents for more information:</p> <ul style="list-style-type: none"> <li>• <a href="http://faq.pcamerica.com/file-lockers/pdf-locker/Salespeople_and_Commissions.pdf">http://faq.pcamerica.com/file-lockers/pdf-locker/Salespeople_and_Commissions.pdf</a></li> <li>• <a href="http://faq.pcamerica.com/file-lockers/pdf-locker/Commission_by_Item.pdf">http://faq.pcamerica.com/file-lockers/pdf-locker/Commission_by_Item.pdf</a></li> </ul> |
| <p>Location <input type="text"/></p>   | <p>This field should contain the exact location of where to find the item in the store (i.e. aisle 5 - self 3).</p>  |
| <p>Unit Size <input type="text" value="0"/> Unit Type <input type="text"/></p>   | <p>These fields should contain the unit size and type for the item. The cost of the item is divided by the unit size when printing shelf labels so that the price per unit can be displayed on them. For example a gallon of milk would have a Unit Size of 1 and a Unit Type of Gallon.</p>   |
| <p>Alternate SKUs <input type="text"/></p> <p><input type="checkbox"/> </p> <p><input type="checkbox"/> </p> | <p>Here you can add additional UPC codes, or barcodes that can be scanned or typed, in order to add the item to an invoice.</p> <p>Select the green check to add an alternate SKU. To delete an alternate SKU highlight the alternate SKU in the list then select the red circle slash.</p>  |

|   |  |   |  |   |  |
|---|--|---|--|---|--|
| <input type="checkbox"/> Modifier Item  | <p><b>Modifier Item</b> - If checked, the item is used to modify another item. For example, an item called "Medium Rare" is a modifier for an item called "Steak" and therefore has this checked.</p> <p>Refer to the following document for more information:</p> <ul style="list-style-type: none"> <li>• <a href="http://faq.pcamerica.com/file-lockers/pdf-locker/Creating_modifiers.pdf">http://faq.pcamerica.com/file-lockers/pdf-locker/Creating_modifiers.pdf</a></li> </ul> |   |  |   |  |
| <input type="checkbox"/> Exclude from Account Limit   | <p>If checked, the price of the item will not factor into the credit limit (if applicable) on a customer's account.</p>  |   |  |   |  |
| <input type="checkbox"/> Check ID Before Selling<br><br><input type="checkbox"/> Check ID #2 Before Selling   | <p>If checked, the cashier will be asked for the date of birth of the customer purchasing this item in accordance with Check ID Level 1 and/or Check ID 2 (see the <b>Inventory</b> tab of the <b>Setup Screen</b>).</p> <p>Refer to the following document for more information:</p> <ul style="list-style-type: none"> <li>• <a href="http://faq.pcamerica.com/file-lockers/pdf-locker/Check_ID.pdf">http://faq.pcamerica.com/file-lockers/pdf-locker/Check_ID.pdf</a></li> </ul>  |   |  |   |  |
| <input checked="" type="checkbox"/> Count This Item   | <p>If checked, the stock level of this item will decrease each time it is sold on an invoice.</p>  |   |  |   |  |
| <div data-bbox="142 1230 630 1390"> <p>Tag Along Items</p> <table border="1"> <tr> <td style="width: 200px; height: 30px;"></td> <td style="text-align: center;"></td> </tr> <tr> <td style="width: 200px; height: 30px;"></td> <td style="text-align: center;"></td> </tr> </table> </div> |  |  |  |  | <p>Here you can force the sale of additional items when the current one is added to an invoice. For example, if you are selling soda with a bottle deposit you would do the following:</p> <p>We would first need to create the soda item and then the bottle deposit item in inventory maintenance. We would then need to add the bottle deposit item to the soda item in this section. When selling soda items the bottle deposit items will automatically be added to the invoice.</p> <p>Select the green check to add a Tag Along Item. To delete a Tag Along Item highlight the item in the list then select the red circle slash.</p> |
|   |   |   |  |   |  |
|   |   |   |  |   |  |
| <input type="checkbox"/> Disable this Item  | <p>If checked, the item cannot be sold or ordered from vendors but will appear in historical sales reports.</p>  |   |  |   |  |
| <input type="checkbox"/> Prompt Quantity  | <p>If checked, the cashier will be prompted for the quantity of the item to sell.</p>  |   |  |   |  |



|  |   |
|--|---|
| <input type="checkbox"/> Prompt Price                | <p>If checked, the cashier will be prompted for the price of the item.</p>  |
| <input checked="" type="checkbox"/> Allow Buyback    | <p>If checked, the item can be bought back, by performing a buyback.</p> <p>Refer to the following document for more information:</p> <ul style="list-style-type: none"> <li>• <a href="http://faq.pcamerica.com/file-lockers/pdf-locker/Split_Invoicing_Buybacks_Trades.pdf">http://faq.pcamerica.com/file-lockers/pdf-locker/Split_Invoicing_Buybacks_Trades.pdf</a></li> </ul> |
| <input checked="" type="checkbox"/> Print on Receipt | <p>If checked, the item will be printed on receipts.</p>  |
| <input type="checkbox"/> Foodstampable               | <p>If checked, the item can be purchased with food stamps, or by using the EBT payment type.</p>  |
| <input type="checkbox"/> Auto-Weigh                  | <p>If checked, a weight will be requested from the scale and used to determine the price of the item when it is selected.</p>   |
| <input type="checkbox"/> Use Serial\Batch #          | <p>If checked, serial numbers will be used to keep track of the item's stock.</p> <p>Refer to the following document for more information:</p> <ul style="list-style-type: none"> <li>• <a href="http://faq.pcamerica.com/file-lockers/pdf-locker/Using_Serial_Numbers.pdf">http://faq.pcamerica.com/file-lockers/pdf-locker/Using_Serial_Numbers.pdf</a></li> </ul>              |
| <input type="checkbox"/> Special Permission          | <p>If checked, the cashier needs the <b>Spell Special Items</b> permission to add the item to an invoice.</p>   |

**Standard Item: Optional Info – Additional Info tab**

|  |  |
|--|--|
| <input type="checkbox"/> Prompt Completion Date                        | <p>If checked, the cashier will be prompted for a completion date when the item is selected. This date will be printed on the receipt so that the customer knows when the item can be picked up. The “pending order” will appear in the <b>Pending Orders</b> tab of <b>Inventory Maintenance</b>.</p> |
| <input type="checkbox"/> Prompt Invoice Notes                          | <p>If checked, the cashier will be prompted for invoice notes when the item is selected. The entered notes will print to the kitchen printers assigned in the <b>Printers</b> Tab for this item.</p>   |
| <input type="checkbox"/> Prompt Description                            | <p>If checked, the cashier will be prompted for a new description for the item when it is selected.</p>  |
| <input type="checkbox"/> Sell 'As Is'                                  | <p>If checked, the invoice will be marked to indicate that the item is sold as is.</p>   |
| <input type="checkbox"/> Require Customer                              | <p>If checked, a customer must be selected before the item can be added to an invoice.</p>   |
| <p>Prompt for Description Over</p> <input type="text" value="\$0.00"/> | <p>If <b>Prompt Description</b> is checked, the cost of the item must be higher than the amount in this field if the cashier is to be prompted for a description.</p>  |
| <input type="checkbox"/> Exclude From Loyalty Plan                     | <p>If checked, sales of the item will not be factored into loyalty incentives.</p> <p>Refer to the document entitled “Customer Loyalty” for more information.</p>  |
| <input type="checkbox"/> Print Ticket                                  | <p>When this option is enabled, a ticket will print to a special printer when the item is purchased. This ticket can then be given to the customer, such as for admission purposes.</p>  |
| <input type="checkbox"/> Scale Single Deduct                           | <p>If checked, the item’s stock level will decrease by one regardless of its weight.</p>   |
| <input checked="" type="checkbox"/> Allow Returns                      | <p>If checked, the item can be returned.</p>   |
| <input type="checkbox"/> Liability Item                                | <p>When this option is checked any sales performed with this item will not be recorded in the net sales column.</p>  |
| <input type="checkbox"/> Allow on Deposit Invoices                     | <p>If checked, the item can be used in conjunction with layaway features.</p> <p>Refer to the document entitled “Setting up Layaway” for more information.</p>   |

|  |  |
|--|--|
| <input type="checkbox"/> Allow on Fleet Card   | This option will allow items to be purchased with a Fleet Card (this is mostly used for fuel).   |
| <input type="checkbox"/> Display Tax in Price  | This option will hide tax on the invoice screen making it seem that no tax has been charged for it.  |
| <div style="border: 1px solid #ccc; padding: 5px;"> <input checked="" type="radio"/> Sold by Piece<br/> <input type="radio"/> Weighed on Scale<br/> <input type="radio"/> Weighed with Tare<br/> <input type="radio"/> Barcoded<br/> <input type="radio"/> Barcoded and Sold by piece </div> | <ul style="list-style-type: none"> <li>• <b>Scale Item Type:</b> <ul style="list-style-type: none"> <li>○ <b>Sold by Piece</b> - This option will sell the item as a regular item, and will deduct one from stock each time one is sold.</li> <li>○ <b>Weighed on Scale</b> - This option requires the item to be weighed on a scale.</li> <li>○ <b>Weighed with Tare</b> - This option requires the item to be weighed on a scale, and will include the tare amount configured when setting up the scale.</li> <li>○ <b>Barcoded</b> - This option is used with <a href="#">Price Embedded Barcodes</a>. For more information please read the document linked above.</li> <li>○ <b>Barcoded &amp; Sold by Piece</b> - This option is used with <a href="#">Price Embedded Barcodes</a>. This will allow you to use the price determined by the barcode but it will not display the weight sold on the receipt.</li> </ul> </li> </ul> |
| <input type="checkbox"/> Never Print in Kitchen  | <b>Never Print in Kitchen</b> – This option (when checked) will allow you to prevent this item from ever being printed in the kitchen.   |
| Days Valid<br><input style="width: 100px;" type="text" value="0"/>   | <b>Days Valid</b> - This option is used in conjunction with the Print ticket option where the number of days that the ticket is valid can be entered here.   |
| Discount Type (Retail Only)<br><input style="width: 100px;" type="text" value="Percent"/>  | Here you decide what kind of discount will be applied to this item when <b>DISCOUNT</b> is selected from the CRE invoicing screen. The cashier will be asked the appropriate question.   |
| General Ledger Number<br><input style="width: 100px;" type="text"/>  | This field is used when exporting your inventory to QuickBooks. Any Number entered here will be made the item number in QuickBooks for the item. Each Item will need to have a separate General Ledger number entered here or the items will not be exported to QuickBooks.  |

## Standard Item: Pending Orders

An example use for the Pending Orders tab would be a bakery that makes cakes. When a customer comes in to purchase a cake item in your inventory (where prompt completion date has been enabled) the cashier will then be prompted to enter the date that the customer would like the cake for. After entering the date and closing out the transaction the order will then be put in this tab. Reports can be ran to show all the pending orders waiting to be completed (see: Pending Order Reports).

These orders are completed and cancelled here. To do this, select a pending order and then the appropriate button.

You can view only open, complete, or cancelled orders by making the appropriate selection above the list of orders.

|   |  |
|---|--|
| <input checked="" type="radio"/> Open <input type="radio"/> Complete <input type="radio"/> Cancelled  | <ul style="list-style-type: none"> <li>Use these radio buttons to filter the results of the pending orders.</li> </ul>                         |
| <div style="border: 1px solid black; padding: 5px; text-align: center;">Complete This Order</div>   | <ul style="list-style-type: none"> <li>To complete an order, highlight the order in the list and select <b>Complete This Order</b>.</li> </ul> |
| <div style="border: 1px solid black; padding: 5px; text-align: center;">Cancel This Order</div>   | <ul style="list-style-type: none"> <li>To cancel an order, highlight the order in the list and select <b>Cancel This Order</b>.</li> </ul>     |
| <p>The diagram shows a sample data row: <code>18   1   1/2/2012   Pickup   Incomplete   1002</code>. Red arrows point from this row to the following labels: <b>Invoice Number</b> (points to '18'), <b>Quantity</b> (points to '1'), <b>Pickup Date</b> (points to '1/2/2012'), <b>Delivery Method</b> (points to 'Pickup'), <b>Status</b> (points to 'Incomplete'), and <b>Store ID</b> (points to '1002').</p> |  |
| <p>The <b>Pending Orders</b> tab shows the following information:</p> <ul style="list-style-type: none"> <li>The Invoice Number</li> <li>The Quantity sold on the invoice</li> <li>The Pickup Date</li> <li>The Delivery Method</li> <li>The Status of the Invoice</li> <li>The Store ID the sale was performed at</li> </ul>   |  |



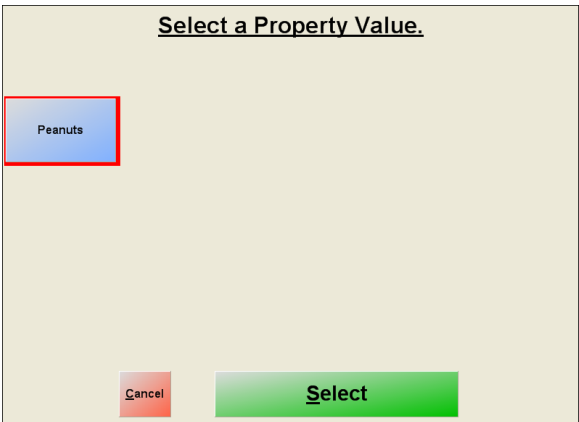
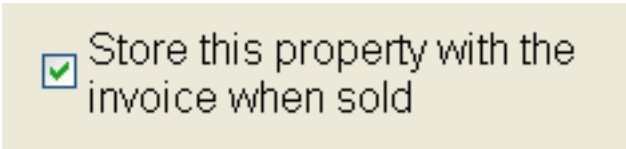
The following reports show a breakdown of all pending orders waiting to be completed:

- Pending Orders
- Pending Orders Item Details

## Standard Item: Properties

For a detailed look at item properties please see the document below:

- [http://faq.pcamerica.com/file-lockers/pdf-locker/Item\\_Properties.pdf](http://faq.pcamerica.com/file-lockers/pdf-locker/Item_Properties.pdf)

|   |   |
|---|---|
|    | <ul style="list-style-type: none"><li>• After selecting the Properties tab:</li><li>• Select the Green Checkbox.</li></ul>          |
|    | <ul style="list-style-type: none"><li>• Select the Property Category.</li></ul>   |
|   | <ul style="list-style-type: none"><li>• Select the Property Value.</li></ul>  |
|  | <ul style="list-style-type: none"><li>• Optionally you can select to Store the property with the invoice when it is sold.</li></ul> |

## Standard Item: Notes

This tab contains a text area for notes about this item which will need to be typed in. These notes can be printed for customers by selecting **Options** or **Manager, Invoice Properties**, and then **Print Item Notes for Last Invoice**.

The screenshot shows the 'Inventory Maintenance' window. At the top, the title bar reads 'Inventory Maintenance'. Below it, the 'Item: \*\*\*\*\* your description \*\*\*\*\*' is displayed in a yellow bar. To the right of this bar are two buttons: 'Print Labels' and 'Keyboard'. The main area is divided into several sections. On the left, there are fields for 'Department for this Item' (set to 'NONE'), 'Item Number' (set to 'Non\_Inventory'), 'Description' (set to '\*\*\*\*\* your description \*\*\*\*\*'), and '2nd Description'. To the right of these fields are numerical input boxes for 'Avg Cost' (\$0.00000), 'Price You Charge' (\$0.00000), 'Price with tax' (\$0.00), and '# In Stock' (-5). There are also checkboxes for 'Tax', 'Tax 2', 'Tax 3', and 'Bar Tax'. Below these fields is a row of tabs: 'Optional Info', 'Pending Orders', 'Properties', 'Notes' (which is selected), 'Modifiers', and 'Price Levels'. Below the tabs is another row of buttons: 'Ordering Info', 'Special Pricing', 'Matrix', 'Sales History', 'Recipe', and 'Printers'. A text area below the buttons contains the instruction: 'You can enter notes to describe your item. This can be used to describe instructions to care for a plant, ingredients inside a meal, or other useful information.' Below this text area is a large empty text box with the placeholder text: 'Here are the Notes for an item that I want to print on my receipts!'. At the bottom of the window, there is a search bar labeled 'Search by Item Number-sorted by name' and three percentage indicators: 'Profit% 0%', 'Retail Discount 0%', and 'Gross Margin 0%'. Below the search bar and indicators are several buttons: 'Previous' (with a left arrow), 'Look up' (with a magnifying glass), 'Next' (with a right arrow), 'Add Item' (green), 'Save' (green), 'Transfer' (purple), 'Instant PO' (purple), 'Help' (with a question mark), 'Duplicate' (green), 'Delete' (red), and 'Exit' (red).

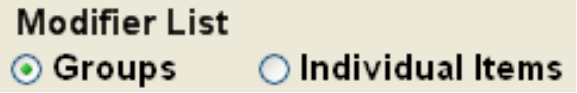


This screen allows you to enter notes to describe your item.

This can be used to describe instructions to care for a plant, ingredients inside a meal, or other useful information.



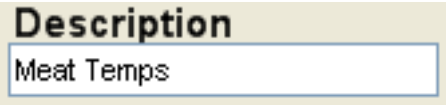

Please be sure to select Save after entering the item notes.

## Standard Item: Modifiers

### Screen Breakdown

|   |   |
|---|---|
|  <p><b>Modifier List</b><br/><input checked="" type="radio"/> <b>Groups</b>    <input type="radio"/> <b>Individual Items</b></p> | <ul style="list-style-type: none"><li>• <b>Modifier List</b> - Here we can select how we will be adding modifiers to this parent item:<ul style="list-style-type: none"><li>○ <b>Groups</b> - A modifier group is a pre-configured grouping of individual modifiers. Instead of adding 5 meat temperature modifier items to 15 steak dinners in a steakhouse (requiring 5 * 15 = 75 clicks), it is much more efficient to group the temperature in a 'Meat Temperature Group', and add the whole group in one shot to each steak dinner (only 15 clicks).<br/><br/>For more information on creating modifier groups see:<br/><br/><a href="http://faq.pcamerica.com/file-lockers/pdf-locker/Creating_modifiers.pdf">http://faq.pcamerica.com/file-lockers/pdf-locker/Creating_modifiers.pdf</a></li><li>○ <b>Individual Items</b> - Individual items refers to standard items entered, with the <a href="#">Modifier Item</a> checkbox selected under the Optional Info tab of Inventory Maintenance. If an item is marked as a modifier, it means it will be used to modify another menu item.</li></ul></li></ul> <p>Modifier items should be used in situations where the current item has a unique modifier list, and that modifier list is not going to be used for any other items. If you are going to be using the same list of choices over and over, you should group the items in a modifier group. If this is a one of a kind (or rare) configuration, you can display a list of items the server has to choose from.</p> |
|    | <ul style="list-style-type: none"><li>• Use these buttons to change the order of the modifiers or modifier groups in the list.</li></ul>  |
|    | <ul style="list-style-type: none"><li>• <b>Remove</b> - This option will remove any selected modifier or modifier group.</li></ul>  |

## Add Modifier Group


|  |  |
|--|--|
|  <p>A green rectangular button with a white checkmark icon in the top right corner. The text "Add Modifier Group" is centered in black font.</p>  | <ul style="list-style-type: none"><li>• Add Modifier Group - After selecting this option you will be presented with a list of all the available modifier groups that can be added.</li></ul> <p>When your selection has been made you will then be asked if you would like to charge for the modifiers in this group.</p> <ul style="list-style-type: none"><li>• Choose yes if you want to charge extra for these modifiers, or no if they are free additions or modifications.</li><li>• The choice to charge for the items in this group can be changed at any time.</li></ul>            |
|  <p>A dropdown menu with a blue background and white text. The text "# To Select" is above the dropdown. The dropdown is currently open, showing a blue arrow pointing down and the number "1" in a white box to the right.</p> | <ul style="list-style-type: none"><li>• # To Select - Using the dropdown, select how to allow for modifiers to be selected:<ul style="list-style-type: none"><li>○ = (Equal to) - Use this option to specify the number of options (modifiers) that must be selected, then enter the number in the field to the right.</li><li>○ &lt;= (Less than or equal to) - Use this option to specify the maximum number of options (modifiers) that can be selected, with the option to select less. After making this selection then enter the number in the field to the right.</li></ul></li></ul> |
|  <p>A text input field with a light beige background and a white border. The text "Description" is above the field, and "Meat Temps" is entered in the field.</p>   | <ul style="list-style-type: none"><li>• Description - Here you can enter a description for the Modifier Group, by default this field will use the information configured for the Modifier Group but can be changed per your needs.</li></ul>   |
|  <p>A text input field with a light beige background and a white border. The text "Prompt" is above the field, and "Please Choose a Meat Temp" is entered in the field.</p>   | <ul style="list-style-type: none"><li>• Prompt - Here you can enter a Prompt for the Modifier Group, by default this field will use the information configured for the Modifier Group but can be changed per your needs. The prompt is what the cashier will see when placing the order (For example, What would you like on your burger).</li></ul>   |



|   |   |
|---|---|
| <p><input type="checkbox"/> <b>Charge for modifiers</b></p> | <ul style="list-style-type: none"> <li>• Charge for Modifiers - Use this option to charge or not charge for modifiers in the modifier group, when they are added to the invoice. The price they will be charged is reflected on the price setup for the modifier item in Inventory Maintenance.</li> </ul> <p>If the items are zero priced (ex: meat temperatures), it does not matter what you charge, but the obvious choice is to choose No.</p> <p>If the item is not free (such as add onion, add tomato), you may not want to charge for it when selling on a burger (as it is included as part of the burgers' price), however you may want to charge for it if when being added as a filling for an omelet.</p> |
| <p><input checked="" type="checkbox"/> <b>Forced?</b></p>   | <ul style="list-style-type: none"> <li>• Forced - This will require that an option is selected by the server or cashier.</li> </ul> <p>You can select whether or not the modifier is forced, meaning the server or cashier MUST select a modifier. You may want to force the server to select a meat temperature for a steak (forced), but most likely would not want to require them to choose a topping for a sundae (not forced, or optional).</p>   |

## Add Modifier

Modifier items should be used in situations where the current item has a unique modifier list, and that modifier list is not going to be used for any other items. If you are going to be using the same list of choices over and over, you should group the items in a modifier group. If this is a one of a kind (or rare) configuration, you can display a list of items the server has to choose from.

|   |  |
|---|--|
|  <p>The image shows a green rectangular button with a white checkmark icon in the top right corner and the text "Add Modifier" in bold black font centered below it.</p> | <ul style="list-style-type: none"> <li>• Add Modifier- After selecting this option you will be presented with a list of all the available modifiers that have been added through Inventory Maintenance.</li> </ul> |
|---|--|

Be sure to select Save after making any changes to your inventory.

For more information on creating modifier groups see:

[http://faq.pcamerica.com/file-lockers/pdf-locker/Creating\\_modifiers.pdf](http://faq.pcamerica.com/file-lockers/pdf-locker/Creating_modifiers.pdf)

## **Standard Item: Price Levels**


Price levels are discounts that can be offered to different groups of customers. To assign a price level to a customer, select **Price Level** in the **General Info** tab of **Customer Maintenance**.

This screen allows you to create discount percentages or prices specific to this item. To access the Price Levels screen, click on the **Price Levels** tab in the **Inventory Maintenance** screen. Cash Register Express and Restaurant Pro Express have 26 price levels, allowing for great pricing flexibility.

**Price Levels:** These are the discount percentages and the respective discount price for an item. The discount prices are displayed once a price has been entered for an inventory item. When the price is changed, the discount information is updated to reflect the change. If the discounted price or percent is different than those from **Setup** Price levels, the inventory levels will take precedence. If you enter a discount price, the percent will be updated. If you enter a percent, the discount price will be updated. The levels will default to the Setup price levels, but these may be changed at any time.

**The price levels A-Z correspond to the customer price level in Customer Maintenance.**

For an item to be discounted for one or more customer price levels (A-Z), the level must be enabled for the item. To enable a price level, highlight the desired price level then click on **Enable**. If a price level is not enabled, customers with that level will be charged full price.

| <table border="1"><thead><tr><th>Level</th><th>Amount</th><th>Percent</th><th>Enabled</th></tr></thead><tbody><tr><td>A</td><td>\$12.99</td><td>0.00%</td><td>No</td></tr><tr><td>B</td><td>\$12.34</td><td>5.00%</td><td>Yes</td></tr><tr><td>C</td><td>\$11.69</td><td>10.00%</td><td>Yes</td></tr></tbody></table> | Level   | Amount  | Percent | Enabled | A | \$12.99 | 0.00% | No | B | \$12.34 | 5.00% | Yes | C | \$11.69 | 10.00% | Yes | For each price level, you can provide either a new price or a percentage to discount (the other will be calculated automatically). |
|---|---|---------|---------|---------|---|---------|-------|----|---|---------|-------|-----|---|---------|--------|-----|--|
| Level   | Amount  | Percent | Enabled |         |   |         |       |    |   |         |       |     |   |         |        |     |  |
| A   | \$12.99   | 0.00%   | No      |         |   |         |       |    |   |         |       |     |   |         |        |     |  |
| B   | \$12.34   | 5.00%   | Yes     |         |   |         |       |    |   |         |       |     |   |         |        |     |  |
| C   | \$11.69   | 10.00%  | Yes     |         |   |         |       |    |   |         |       |     |   |         |        |     |  |
|  <p>The image shows two buttons: a green button labeled 'Enable' and a red button labeled 'Disable', both with rounded corners and a slight shadow.</p>  | Enable a price level by selecting <b>Enable</b> and disable one by selecting <b>Disable</b> . |         |         |         |   |         |       |    |   |         |       |     |   |         |        |     |  |

## **Standard Item: Ordering Info**

Refer to the following document for more information:

- [http://faq.pcamerica.com/file-lockers/pdf-locker/Vendors\\_and\\_Purchase\\_Orders.pdf](http://faq.pcamerica.com/file-lockers/pdf-locker/Vendors_and_Purchase_Orders.pdf)

This screen allows you to configure the ordering of an item. To access the Ordering Info screen, click on the **Ordering Info** tab in the **Inventory Maintenance** screen.

- **Reorder Quantity:** This is the quantity that you would like to reorder when your stock is low, and is the default quantity that will be placed on a purchase order for this item. This quantity can be modified at any time.
- **Reorder Level:** This is the "low point" your stock must reach before the reorder report warns you that you need to order more of this product.
- **Reorder Cost:** This is how much you will pay for the item when it is reordered from your preferred vendor
- **Vendor Part #:** This is the part number that your vendor requires you to use when ordering this item.
- **Cost Per:** Enter the cost per item in this field.
- **Case Cost:** Enter the cost per case for the item.
- **Number in Case:** Enter the number of items per case.
- **Transfer Cost Markup:** This feature takes the average cost of an item when transferred between stores. For example: store A buys 1 magnet at a cost of \$5.00, store B buys 1 magnet for \$10.00. When store A transfers 1 magnet to store B the cost will be \$7.50. This cost, when enabled, overrides the inventory cost and will be reflected in reporting.
- **Enable Markup:** When checked will enable the transfer cost markup feature.

To add a vendor for an item:

- Click on **Add Pricing from a Vendor**. You will be prompted to select a vendor.
- Enter the cost the vendor charges you for this item. The default cost will be the amount entered in **Reorder Cost**.

To delete a vendor for an item:

- Highlight the desired vendor in the vendor list.
- Click on **Remove Pricing from Vendor**.

To designate a vendor as the preferred vendor for an item:

- Highlight the desired vendor in the vendor list.
- Click on **Set this Vendor as the Preferred**.

This vendor will be the default vendor for purchase orders of this item. The vendor must first be added through **Vendor Maintenance** screen.

## Standard Item: Special Pricing

Inventory Maintenance

Item: test Print Labels Keyboard

Department for this Item: NONE Avg Cost: \$0.00000  Tax  
Item Number: 257554910228 Price You Charge: \$0.99  Tax 2  
Description: test Price with tax: \$0.99  Tax 3  
# In Stock: 0  Bar Tax

Click to Select Picture

Optional Info Pending Orders Properties Notes Modifiers Price Levels

Ordering Info **Special Pricing** Matrix Sales History Recipe Printers

Sale Pricing Bulk Pricing Time Based Pricing

Set Description

Add Remove Add Remove Add Remove

Retail Price \$0.00 Trade Price \$0.00 BuyBack Price \$0.00 Suggested Deposit \$0.00

Search by Item Number Profit% 0% Retail Discount 0% Gross Margin 100.0%

Previous Look up Next Add Item Save Transfer Instant PO Help Duplicate Delete Exit

Refer to the following document for more information:

- [http://faq.pcamerica.com/file-lockers/pdf-locker/Special\\_Pricing.pdf](http://faq.pcamerica.com/file-lockers/pdf-locker/Special_Pricing.pdf)

This screen allows you to set up different pricing structures for an item. To access the Special Pricing screen, click on the Special Pricing tab in the Inventory Maintenance screen.

Special pricing is an extremely powerful feature of our point of sale. If the prices are set up ahead of time, all your cashiers have to do is scan items; the correct special price will be automatically calculated, which means the cashier does not have to worry about calculating or looking up a price.

- **Sale Pricing:** This function allows you to place an item on sale for certain dates. To create sale pricing for this item, click on Add. You will be prompted to enter the percent you want the item to be marked down. Click on the beginning date from the calendar and click Select, then click on the ending date from the calendar and click Select. To remove a sale price for an item, select the desired sale price then click on Remove. A To place an item on sale for only one day, select the same day for both starting and ending date. This is used to put an item on sale for a defined period of time.
  - Retail example: Items on sale in a circular at a grocery store
  - Restaurant Example: All steak dishes 10% off next week
- **Bulk Pricing:** This function allows you to sell items at a reduced price when your customer's buy in bulk. To set up a bulk price for an item, click on Add, enter the quantity needed to be purchased for bulk pricing, and then enter the new price. To remove a bulk price for an item, select the desired bulk price then click on Remove.
  - Retail Example: Pet store sells a bag of cat food for \$10, or 3 for \$26
  - Restaurant Example: Buy one drink, get one free

Bulk Pricing requires that the option **Combine Lines** is enabled in the setup screen.

- **Time-Based Pricing:** This function allows you to offer alternate prices on certain days within certain time ranges. Businesses usually use time based pricing to attract customers during their non-busy hours. To enter time-based price for an item, click on Add, select the day on which you want to offer the sale price, and then enter the start and end times. To remove a time-based price for an item, select the desired price then click on Remove.
  - Retail Example: All clothing 10% off Monday 9 AM – 11 AM
  - Restaurant Example: A bar may offer a beer during happy hour on Fridays from 4PM to 6PM for a sale price of \$2.00 while the normal price is \$4.00.

If happy hour is 4 PM to 6 PM, start your time-based price at 3:50 PM and end it at 6:10 PM. You may sell a few extra discounted drinks, but you will also avoid annoying a customer who orders a beer at 6:02 PM and wants the discount.

- **Retail Price:** This is the manufacturer (or vendor's) suggested retail price. This field is for informational purposes only.
- **Trade-Price:** Enter the amount that this item is worth if traded in. This is used in the split-invoice screen, which allows for trades and buybacks.
- **BuyBack Price:** Enter the amount that will be paid for buyback of this item. This is also used in the split-invoice screen.
- **Suggested Deposit:** Here you can enter the suggested deposit for rental items.

## Standard Item: Matrix/Rental

The option that is displayed here is dependent on the department type selected in department Maintenance for this specific inventory item:

- [Matrix](#) - If the department type selected is a regular department.
- [Rental](#) - If the department type selected is a rental department.

## Matrix

The screenshot shows the 'Inventory Maintenance' window with the 'Matrix' tab selected. The item name is 'test'. The 'Department for this Item' is set to 'NONE'. The 'Item Number' is '257554910228' and the 'Description' is 'test'. The 'Avg Cost' is '\$0.00000', 'Price You Charge' is '\$0.99', and 'Price with tax' is '\$0.99'. The '# In Stock' is '0'. There are checkboxes for 'Tax', 'Tax 2', 'Tax 3', and 'Bar Tax'. The 'Matrix' tab is active, showing a table for 'Serial/Batch Numbers' with columns for 'Serial/Batch #' and 'Quantity PO #'. The table is currently empty. At the bottom, there are buttons for 'Add Item', 'Save', 'Transfer', 'Instant PO', 'Previous', 'Look up', 'Next', 'Help', 'Duplicate', 'Delete', and 'Exit'. The status bar shows 'Profit% 0%', 'Retail Discount 0%', and 'Gross Margin 100.0%'.

This screen allows you to view the matrix info for an item created using the Styles Matrix. For more information on creating or updating a matrix, see the Styles Matrix section.

This information cannot be modified in Inventory Maintenance. To access the Matrix screen, click on the Matrix tab in the Inventory Maintenance screen.

- **Style:** This displays the style for the inventory item. This is how items with different styles can be classified. For example, you may have a pleated skirt that comes in four colors (white, blue, black, and purple) and three sizes (Small, Medium, and Large). In order to keep track of how many of each color and size you have, you need to use a style, such as Long Skirt. Each size in each color can have its own item number, and you can keep track of how many pleated skirts you have. This screen is informational only and cannot be modified. Changes must be made through the Styles Matrix in the Administrative menu of the Setup Screen (Modern) or the Inventory menu (Traditional).
- **Size:** This is the size of the item. If you have an item that comes in different sizes (such as Small, Medium, and Large), you can use this field along with a group name to create a different item number for each size.
- **Color:** This is the color of the item. If you have an item that comes in several colors (such as Black, White, and Blue), you can use this field along with a group name to create a different item number for each color.

## Rental

Inventory Maintenance

Item: test Print Labels Keyboard

Department for this Item: test Avg Cost: \$0.00000  Tax  
Item Number: 257554910228 Price You Charge: \$0.99  Tax 2  
Description: test Price with tax: \$0.99  Tax 3  
# In Stock: 0  Bar Tax

Click to Select Picture

Optional Info Pending Orders Properties Notes Modifiers Price Levels

Ordering Info Special Pricing Rental Sales History Recipe Printers

RENTAL

# Days Rent: 0 Item Approval Code:   
Daily Late Charge: \$0.00 Actor Name:   
Rating:  Actress Name:

Multi-Day Rental Pricing Remove Add

| # Days | Price |
|--------|-------|
|        |       |

Search by Item Number:  Profit% 0% Retail Discount 0% Gross Margin 100.0%

Add Item Save Transfer Instant PO

Previous Look up Next Help Duplicate Delete Exit

This screen allows you to specify rental information for an item.

To access the Rental screen, click on the Rental tab in the Inventory Maintenance screen.

**NOTE:** This tab will only appear if the department for the displayed item is a rental department.

- **# Days Rent:** This is the number of days the item can be rented for without incurring any late charges.
- **Daily Late Charge:** This is how much the customer will be charged per day once the item is overdue.
- **Rating:** This is the rating of the movie (Example: G, PG, PG-13, R, or NC-17).
- **Item Approval Code:** This field is for informational purposes only. You may enter an item approval code for a rental item in this field.
- **Actor Name:** If the rental item is a movie, you may enter the leading actor's name in this field.
- **Actress Name:** If the rental item is a movie, you may enter the leading actress' name in this field.
- **Multi Day Rental Pricing:** This allows you to specify different prices for different lengths of rental. For example, you can choose to charge \$2.50 for a 2-day rental but \$4.50 for a 5-day rental.
  - To add a rental price, click on Add then enter the number of rental days for this price level and the desired price.
  - To remove an existing rental price, highlight the desired pricing then click on Remove.

## Standard Item: Sales History

The screenshot shows the 'Inventory Maintenance' window for item 'test'. The 'Sales History' tab is selected, displaying a table with columns: DateTime, Store\_ID, Invoice\_Number, Quantity, PricePer, CostPer, and CustN. The table is currently empty. The interface includes various input fields for item details (Department: NONE, Item Number: 257554910228, Description: test, Avg Cost: \$0.00000, Price You Charge: \$0.99, Price with tax: \$0.99, # In Stock: 0) and tax options. At the bottom, there are navigation buttons (Previous, Look up, Next), a search field, and action buttons (Add Item, Save, Transfer, Instant PO, Help, Duplicate, Delete, Exit). Profit% is 0%, Retail Discount is 0%, and Gross Margin is 100.0%.

This screen displays all of the invoices on which the selected item was sold.

It displays the Invoice Number, Date, Time, Customer Number, Quantity, Cost, and Price.

To access the Sales History screen, click on the Sales History tab in the Inventory Maintenance screen.



## Standard Item: Recipe

Inventory Maintenance

Item: test Print Labels Keyboard

Department for this Item: NONE Avg Cost: \$0.00000  Tax  
Item Number: 257554910228 Price You Charge: \$0.99  Tax 2  
Description: test Price with tax: \$0.99  Tax 3  
# In Stock: 0  Bar Tax

Click to Select Picture

Optional Info Pending Orders Properties Notes Modifiers Price Levels  
Ordering Info Special Pricing Matrix Sales History Recipe Printers

An item's ingredients will be deducted from stock when it's sold

| ItemNum | Description | Quantity | Yield | Cost |
|---------|-------------|----------|-------|------|
|---------|-------------|----------|-------|------|

Search by Item Number Profit%: 0% Retail Discount: 0% Gross Margin: 100.0%

Previous Look up Next Add item Save Transfer Instant PO  
Help Duplicate Delete Exit

Refer to the following link for more information:

- [http://faq.pcamerica.com/file-lockers/pdf-locker/Ingredient\\_Tracking.pdf](http://faq.pcamerica.com/file-lockers/pdf-locker/Ingredient_Tracking.pdf)

This screen allows you to specify ingredients for an item. You can set RPE to deduct ingredients from your stock when the main item is sold. CRE\RPE can also be set to deduct when the meal is prepared (ahead of time) as opposed to when it is sold.

To access the Recipe screen, click on the Recipe tab in the Inventory Maintenance screen.

NOTE: Ingredients are standard items that must first be created through the Inventory Maintenance screen.

To add an ingredient for an item, click on Add Ingredient then select the desired inventory item.

Choose the amount of the item to add as an ingredient and then choose the Yield.

The Yield is a margin of waste when selling the item. For example, 110 pounds of beef may have 10 pounds of unusable bone; that means for every 10 pounds of beef you sell, you are really using 11 pounds of your original stock, as 1 pound of bone is wasted. In this case, you would use a 10% yield (10 pounds \* 10% waste = 11 pounds used.)

To remove an ingredient, highlight the desired ingredient then click on Remove.

## Prepare Batch

If the option **Deduct Ingredients** is set to **At Preparation** then the following will need to be done in order to have the stock levels be deducted.

The screenshot shows the 'Inventory Maintenance' window for item 'Cake'. The 'Recipe' tab is active, displaying a table of ingredients. The table has columns for ItemNum, Description, Quantity, Yield, and Cost. The ingredients listed are Eggs (Quantity: 3, Yield: 0.001%, Cost: \$0.000) and Mix (Quantity: 10, Yield: 0.125%, Cost: \$0.000). A 'Prepare Batch' button is located at the bottom right of the table. The interface also includes various navigation and action buttons like 'Add Ingredient', 'Remove', 'Add Item', 'Save', 'Transfer', 'Instant PO', 'Previous', 'Next', 'Help', 'Duplicate', 'Delete', and 'Exit'.

| ItemNum | Description | Quantity | Yield  | Cost    |
|---------|-------------|----------|--------|---------|
| Eggs    | Eggs        | 3        | 0.001% | \$0.000 |
| Mix     | Mix         | 10       | 0.125% | \$0.000 |

- On the **Recipe** tab of the parent item select the **Prepare Batch** button.

The dialog box is titled 'Prepare what quantity?'. It features a numeric keypad with digits 0-9, a decimal point, and a '+/-' sign. Below the keypad are 'Clear' and 'Cancel' buttons, and a large green 'OK' button. The number '1' is displayed in the top right corner of the keypad area.

- Enter the quantity you would like to make. This will add one in stock to the parent item and deduct the correct quantity for the items in the recipe.

## Standard Item: Printers

The screenshot shows the 'Inventory Maintenance' window for item 'test'. The 'Printers' tab is selected, displaying a configuration area with the following elements:

- Buttons:** 'Add Printer' (green), 'Add Monitor' (green), 'Add Route' (green), and 'Remove' (red).
- Text:** 'When you sell this item, it will print to the following printer(s), and display on the following monitor(s):' followed by a large empty text box.
- Selection:** 'Click to select:' followed by two buttons: 'BumpBar Backcolor' (black) and 'BumpBar Forecolor' (green).
- Search and Navigation:** A search bar for 'Item Number', and buttons for 'Add Item', 'Save', 'Transfer', 'Instant PO', 'Previous', 'Look up', 'Next', 'Help', 'Duplicate', 'Delete', and 'Exit'.
- Financials:** Profit% 0%, Retail Discount 0%, and Gross Margin 100.0%.

This screen allows you to select which printer(s) an item will print to and/or which monitor(s) an item will be displayed on. For example, if a customer orders a Coke and a hamburger, you can print the soda order at the Bar and the hamburger at the Kitchen. To access the Printers screen, click on the Printers tab in the Inventory Maintenance screen.

Printers should be configured in the Friendly Printers portion of the program.

You can choose to print to any printer that is setup on your system, including local and network printers.

Even if you don't choose a printer, a receipt will print to the default printer if Print Invoices is set to YES in the Setup screen.

- **Add Printer:** Once a friendly (remote) printer has been created in the Friendly Printers Section, you may select that printer to print to for this item.
  - To add a printer for an item, click on Add Printer. You will be prompted to select a printer to add.
- **Add Monitor:** Use this button to send an item to a monitor at a specified Station ID instead of (or in addition to) a printer. The order can then be displayed on the selected station by choosing Order Filling from the File menu on the Restaurant Pro Express Login Screen.
- **Add Route:** Use this button to add a Bumpbar Route that has been configured.
- **Remove:** To remove a printer or monitor for an item, highlight the desired printer/monitor then click Remove
- **Select Bumpbar Colors:** In order to select the background color of the screen for the bumpbar select the backcolor tab and choose a color. Now you will need to choose a color for the text on the screen.
  - Select the Forecolor tab and choose a color. It is a good idea to select a dull back color and a bright forecolor.

## Choice Item

The screenshot shows the 'Inventory Maintenance' window for a 'Choice item: 1234'. The interface includes a header with 'Print Labels' and 'Keyboard' buttons. Below the header are input fields for 'Department for this Item' (set to 'NONE'), 'Item Number' (1234), 'Description' (1234), and 'Prompt'. A 'Click to Select Picture' link is also present. The main area is divided into 'Choices' and 'Options' tabs. The 'Choices' tab displays a table of items:

| Item #       | Description | Quantity | Is Property                         |
|--------------|-------------|----------|-------------------------------------|
| 257554910228 | test        | 1        | <input checked="" type="checkbox"/> |
| 123          | Taxed item  | 1        | <input type="checkbox"/>            |

Below the table are buttons for 'Add Item', 'Add Properties', and 'Remove Item'. A note states: 'A choice item isn't an actual item. When you 'sell' a choice item, it will let you choose the item to sell off the above list.' At the bottom, there are search and action buttons: 'Search by Item Number', 'Add', 'Save', 'Transfer', 'Instant PO', 'Previous', 'Look up', 'Next', 'Help', 'Duplicate', 'Delete', and 'Exit'. Profit%, Retail Discount, and Gross Margin are all set to 0%.

A Choice Item is not a real item, but rather provides a way to have the user choose from a list of similar products.

For example, if you are a grocery store that sells green grapes, red grapes, blue grapes, purple grapes and white grapes, you can create a pass-along item called Grapes.

When you sell grapes, you will be prompted to choose which of the five types of grapes is being sold. Your cashiers will not need to remember five different codes for grapes; they can push the grapes button and have a choice pop up in front of them.

The pass-along item is the 'fake' item called 'Grapes'. The items included inside of the pass-along are the 'real' items, the choices that are displayed when you 'sell' the pass-along. In this example, the items would be green, red, blue, purple and white grapes.

A restaurant may use this for a liquor menu. The person configuring the menu would create all their liquors as standard inventory items, and create an 'S Liquor' pass-along, with all liquors that start with the letter S inside of it. Instead of scrolling through searching for Smirnoff vodka, the bartender can touch S and see the Smirnoff amongst a few other S liquors.

To associate an item with the current choice item, click on Add Item to Choice. Select the desired item from your inventory (see Figure 2) then click Select. Repeat to add more items.

You may put the pass-along items in any order you wish by using the up and down arrow keys.

To delete an item from the list, highlight the desired item then click on Remove Item.

- **Item Number:** This is where you enter the unique identifier for an item. It can be up to 18 characters long and consist of any combination of letters and numbers. However, if you are using barcodes, as is recommended, you may only use numbers in the item number. Do not use any punctuation or spaces as part of the item number.
- **Description:** This is the description of the item that will appear on invoices and reports. It can be up to 30 characters long per line (2 lines total) and consist of any upper and lower case letters, numbers, punctuation, or spaces. Do not use the asterisk (\*) or apostrophe (') as part of the item name.
- **Prompt:** This is the question that will be asked to the cashier or the server when they 'sell' the pass-along. Example: What variety of grapes?
- The Options tab allows for an alternate SKU to be entered for the item.

## Modifier Group

Inventory Maintenance

Enter information for the item and touch 'Save' Print Labels Keyboard

Department for this Item: mods

Item Number: Meat Temps

Description: Meat Temps

Prompt: Please Choose a Meat Tem

Click to Select Picture

| Item #   | Description | Quantity | Price  |
|----------|-------------|----------|--------|
| Medrare  | Med Rare    | 1        | \$0.00 |
| Medium   | Medium      | 1        | \$0.00 |
| Med well | Medium Well | 1        | \$0.00 |
| rare     | rare        | 1        | \$0.00 |
| WellDone | Well Done   | 1        | \$0.00 |

Add Modifier Remove Modifier

A modifier group allows you to easily group modifier items. For example, if you have 'Extra Cheese', 'Peppers' and 'Mushrooms', you can group them into a 'Pizza Toppings' modifier group.

Search by Item Number:

Profit%: 0% Retail Discount: 0% Gross Margin: 0%

Save Save Transfer Instant PO

Previous Look up Next Help Duplicate Delete Cancel

A modifier group is an easy way to group modifiers for simpler selection when an item is sold. For example, you can group pepperoni, meatball, sausage, extra cheese, and peppers as a "Pizza Toppings" modifier group. To associate a modifier group with an item, you must add it using the Modifiers tab of the Inventory Maintenance screen.

In order to be added to a modifier group, an item must be marked as a modifier item in the Optional Info section of the Inventory Maintenance screen.

To add a modifier to the modifier group, click on Add Modifier. A screen with items marked as modifiers will appear, click on the desired modifier.

To delete a modifier from the modifier group, highlight the desired modifier item then click on Remove Modifier.

For more information on creating modifier groups see:

[http://faq.pcamerica.com/file-lockers/pdf-locker/Creating\\_modifiers.pdf](http://faq.pcamerica.com/file-lockers/pdf-locker/Creating_modifiers.pdf)

## Coupon Item

There are two sections of configurable options on this tab:

- [Days Valid](#)
- [Restrictions](#)

Inventory Maintenance

Coupon: test Coupon Print Labels Keyboard

Department for this Item: NONE  Flat Amount  Percent  Tax

Item Number: test Coupon Discount Amount: \$5.00  Tax 2

Description: test Coupon  Tax 3

Click to Select Picture

Days Valid Restrictions

Does this coupon expire? Expiration Date: 4/28/2012

Valid Days and Times

|           |                   |
|-----------|-------------------|
| Sunday    | 12:00 AM-11:59 PM |
| Monday    | 12:00 AM-11:59 PM |
| Tuesday   | 12:00 AM-11:59 PM |
| Wednesday | 12:00 AM-11:59 PM |
| Thursday  | 12:00 AM-11:59 PM |
| Friday    | 12:00 AM-11:59 PM |
| Saturday  | 12:00 AM-11:59 PM |

Search by Item Number Profit% 0% Retail Discount 0% Gross Margin 0%

Previous Look up Next Add Save Transfer Instant PO

Help Duplicate Delete Exit

### Days Valid

- **Department for this Item:** This allows you to select a department for the inventory item. Click on the dropdown menu to scroll through the Department list. Highlight the desired department.

**NOTE:** The Department must first be added through Department Maintenance under Departments in the Inventory menu. You can quickly access the Department Maintenance screen by clicking on "Department for this Item".

- **Item Number:** This is where you enter the unique identifier for an item. It can be up to 18 characters long and consist of any combination of letters and numbers. However, if you are using barcodes, as is recommended, you may only use numbers in the item number. A Do not use any punctuation or spaces as part of the item number.
- **Description:** This is the description of the item that will appear on invoices and reports. It can be up to 30 characters long per line (2 lines total) and consist of any upper and lower case letters, numbers, punctuation, or spaces. A Do not use the asterisk (\*) or apostrophe (') as part of the item name.
- **Flat Amount:** Select this option to specify a flat discount amount. Enter the amount to be discounted in the Discount Amount field. For example, enter \$10.00 to specify a \$10.00 discount coupon.
- **Percent:** Select this option to specify a percent discount. Enter the discount percentage in the Discount Amount field. For example, enter 10.00% to specify a 10% discount coupon.
- **Tax 1,2,3:** Here you can specify which tax rates (if any) will be applied to the item.

This screen also allows you to specify an expiration date and times when the coupon can be used.

- **Does this coupon expire?:** Click on the box next to Does this coupon expire to apply an expiration date to this coupon. Then enter an expiration date in the Expiration Date field.
- To specify times when the coupon is valid, click on Add Time, select the desired day(s), then select the starting and end time.
- To remove a time, highlight the desired time then click on Delete Time.

## Restrictions

Inventory Maintenance

Coupon: test Coupon Print Labels Keyboard

Department for this Item: NONE  Flat Amount  Percent  Tax

Item Number: test Coupon Discount Amount: \$5.00  Tax 2

Description: test Coupon  Tax 3

Click to Select Picture

Days Valid: Restrictions

| Rule | Type | Description |
|------|------|-------------|
|------|------|-------------|

Minimum Amount: \$0.00 # Days Between Use: 0

Include all items besides above exceptions  Only allow through bonus plan  Allow on Deposit Invoices

Apply only to parent items  Suppress Bonus Points of Affected Items  Apply to already discounted items

Apply to items using special pricing  Require Permission

Search by Item Number: Profit% 0% Retail Discount 0% Gross Margin 0%

Buttons: Add, Save, Transfer, Instant PO, Previous, Look up, Next, Help, Duplicate, Delete, Exit

This screen allows you to determine what items the coupon may or may not be used to discount. Use the 'Include' button to allow this coupon to discount a certain item, department or category. Exclude will specify that the coupon will be accepted if that exclusive item is also on the invoice. For example, you can exclude other coupons to make sure only one coupon is used per sale.

- **Include:** Click on this button to select items for which the coupon is valid. You can choose to include an item, department, or category.
- **Exclude:** Click on this button to select items that are excluded from discounts with this coupon. You can choose to exclude an item, department, or category.
- **Exclusive:** Click on this button to select items for which this coupon cannot be combined with other coupons on the invoice.
- **Delete:** Highlight the rule in the grid and then select this button - this will remove it from the list.
- Specify the minimum dollar amount the invoice has to be in order for the coupon to be triggered.  
Specify the number of days between uses of the coupon that is acceptable
- **Include all items besides above exceptions:** Select this option if the coupon can be used on all items except the items you have excluded above. Check this and exclude what you don't want the coupon applied to.
- **Apply only to parent items:** Select this option if you only want to apply this coupon to parent items. A parent item is the head item in a group, such as the top item in a kit or the top item without its modifiers. For example, enabling this option would allow you to discount a pizza but not its toppings or to discount a computer but not its upgrades. Ensure that the coupon does not apply to modifiers.
- **Apply to items using Special Pricing:** Select this option if you want to apply this coupon to items where special pricing has been configured. Special pricing is configured on the [Special Pricing tab](#) of Inventory Maintenance. For example, enabling this option would allow you to apply a coupon to an item with a sale price.
- **Only allow through bonus plan:** Select this option if you want this coupon so it can only be fired through the bonus plan. For example, you can set the coupon as only through bonus plan if it is a free car wash coupon. You don't want cashiers entering this coupon code for all of their friends, therefore, you can set it so only someone with enough bonus points can get this reward. Only applicable if triggered through a loyalty plan.
- **Suppress Bonus Points of Affected Items:** If the coupon is used, you do not get loyalty plan points on this invoice.
- **Allow on Deposit Invoices:** This option will allow the coupon to be applied to invoices that require a deposit to be paid.
- **Apply to already discounted items:** Whether or not it can be applied to invoices that are already discounted.
- **Require Permissions:** Whether the employee needs permission to ring up the coupon.

## Combo (Kit) Item

Combo (Kit) is a feature used when you would like to group items from your inventory together either at the normal rate or at a different rate.

For example: If you have a restaurant and would like to have a Combo Meal - 1 which would include a Hamburger, French Fries, and a Soda - you would use this feature to achieve the combo meal. Customers who order this meal can be charged a different price than the total of the items added to the invoice separately.

### Combo (Kit) Screen Breakdown



Calculated   
Override Price

- Calculated: This is the price for the total of the items selling price that have been added to the Combo (Kit).
- Override Price: This is the price that is user-defined as the selling price for the Combo (Kit). This is used if you would like to charge a different price than the calculated price for the Combo (Kit).



| Item #    | Description  | Quantity | Price  |
|-----------|--------------|----------|--------|
| 123456789 | Diet Cola    | 1        | 1.7500 |
| FF        | French Fries | 1        | 2.0000 |
| Hamburger | Hamburger    | 1        | 3.5000 |

- Items tab: This tab shows the items that have been added to the Combo (Kit) including the Item #, Description, Quantity, and Price.



- Add Item: Select this button to search for the item to add to the Combo (Kit) via the Inventory Lookup Window.
- Delete Item: Select this button after highlighting an item on the list to remove it from the Combo (Kit).

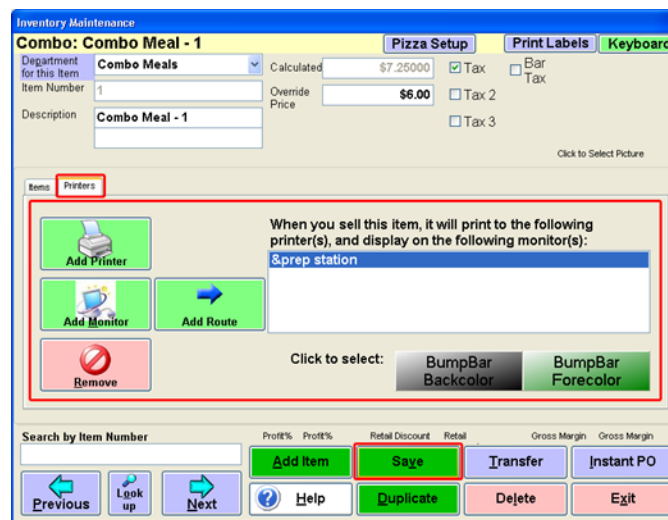


Combo Pricing  
 Use calculated price  Use override price  Use grid pricing  
 Check ID Before Selling



Under Combo Pricing Choose how you would like to calculate the total for the combo/kit.

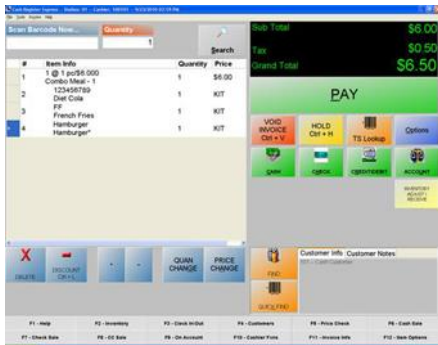
- Use Calculated Price: This option will total the prices for the inventory added to the kit/combo. After adding the prices together of each item that is part of the kit/combo it will then check the tax settings for each item.
  - The tax check boxes for the kit should be disregarded when using Calculated Price, as it uses the tax settings for each item.
- Use Override Price: This option will disregard all price and tax settings for the items in Inventory Maintenance. CRE/RPE only looks at the Override Price that the user sets for the Kit/combo.
  - The tax setting that you have setup for the kit itself will be used and not the tax rates for the specific items.
- Use Grid Pricing: This option will look at the specific settings of each item in the Grid. The grid by default will use the normal price set in inventory maintenance, but you can edit that price in the grid.
  - The tax check boxes should be disregarded when using Grid Pricing. CRE/RPE will look at the tax settings for each specific item in Inventory Maintenance.



Under the Printers tab:

- If you would like to send this combo to the kitchen/preparation area, you can add it to the kit here. For more information on using this tab please see: [The Printers tab](#)
- Select Save when finished with any/all of your edits.

## Selling Combo/Kit Items



- In CRE after logging you can add the Combo (Kit) to the invoice. The price will be determined by how the Combo (Kit) was configured in Inventory Maintenance.



- In RPE after logging you can add the Combo (Kit) to the invoice. The price will be determined by how the Combo (Kit) was configured in Inventory Maintenance.

## Other Options:

Auto-Kit / Auto-Combo

- Select Auto-Kit \ Auto-Combo (on Page 1 of the Invoice Settings tab of the Setup Screen) to automatically charge the price for the kit/combo when the inventory items contained within, are added to an invoice separately.