



Quick Reference Guide for Inventory Building – Retail

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Introduction

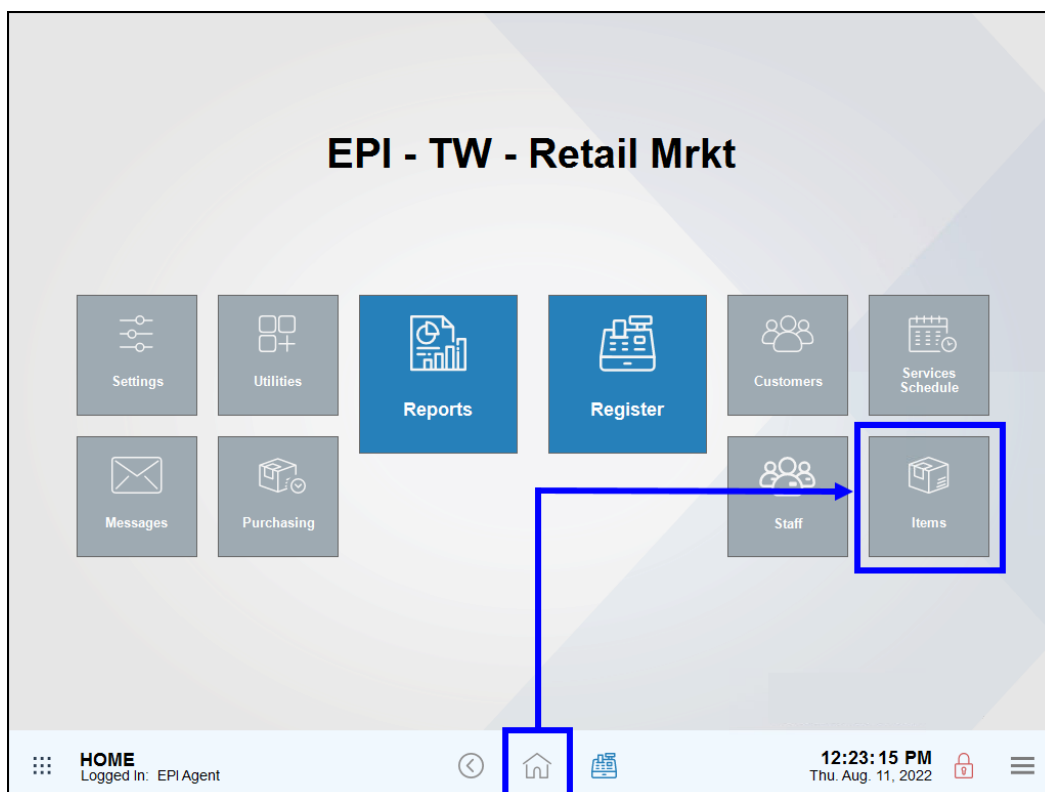
The Exatouch Point of Sale (POS) system allows users to quickly build inventory to maximize efficiency when processing sales.

This document contains the procedures required to build an inventory in Exatouch. It is intended to be a Quick Reference Guide, and does not incorporate all capabilities and features available in the Exatouch POS system. Hyperlinked topics within this document will take you to the Exatouch Knowledge Base for more information.

Getting Started

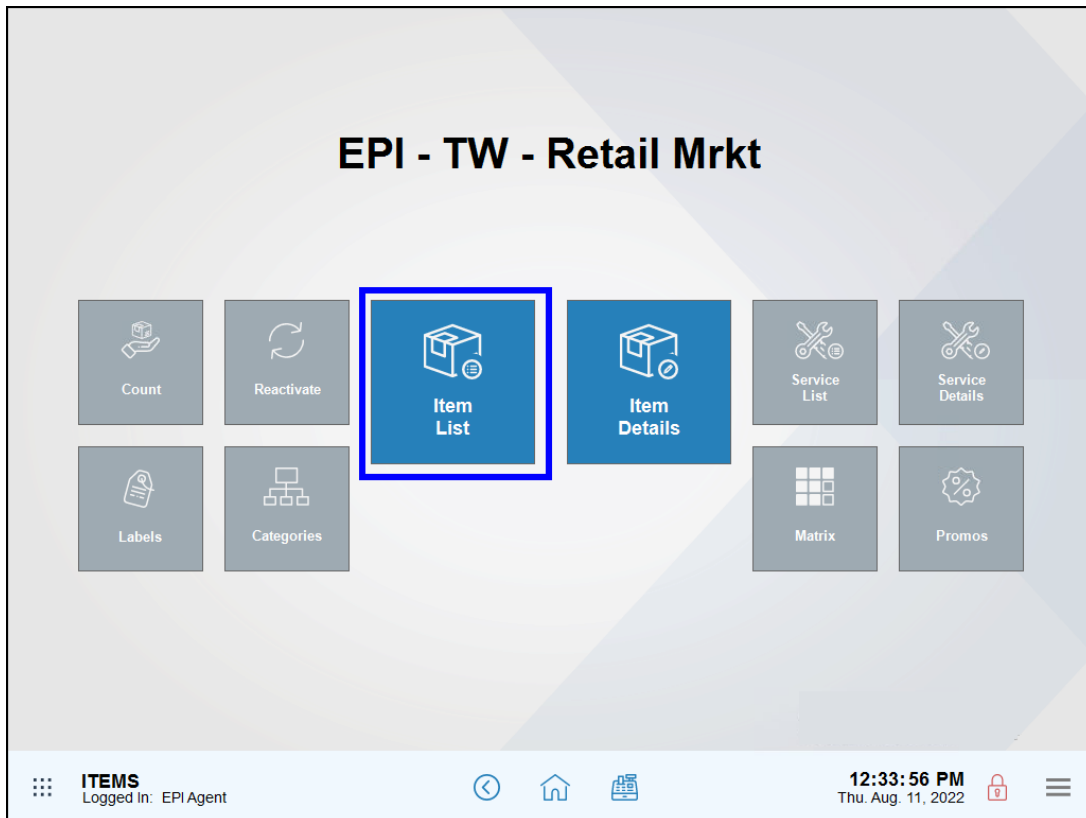
Items Module

Item inventory building takes place within the **Items** module, which is located on the **Home** screen. Navigate to the Home screen by tapping the **Home** button at the bottom of most Exatouch screens.



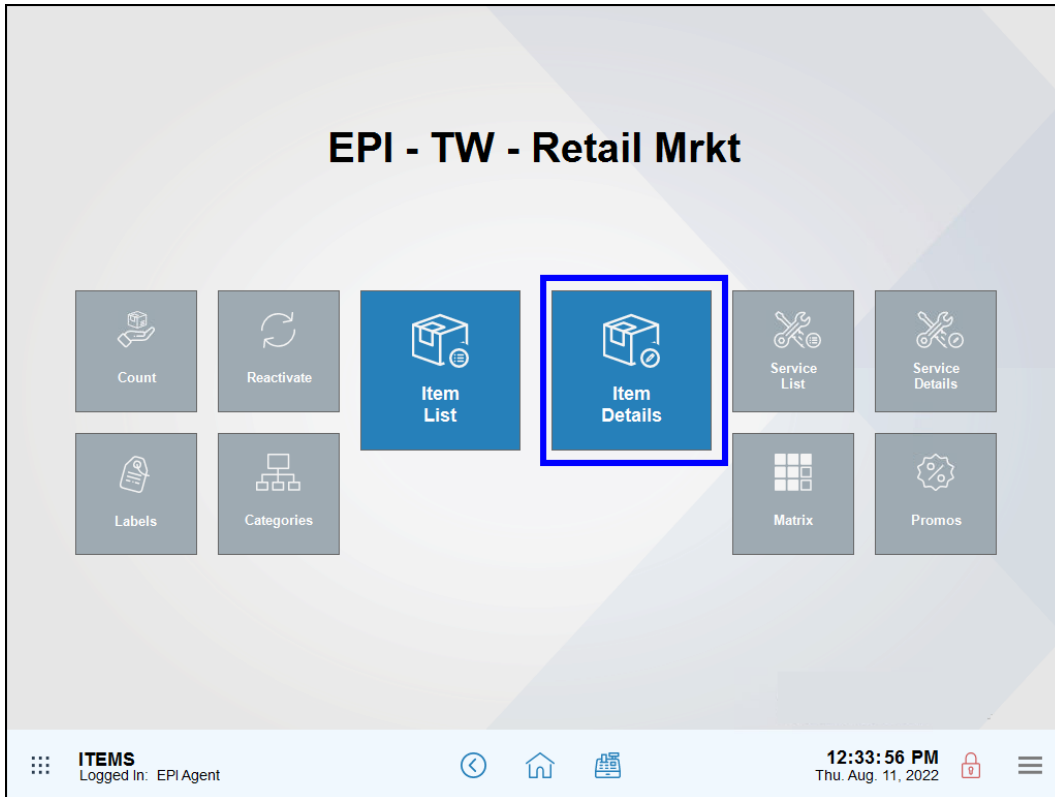
Item List Module

Tapping the **Item List** module displays all items added into the Exatouch POS. From **Home**, navigate to **Items > Item List**.



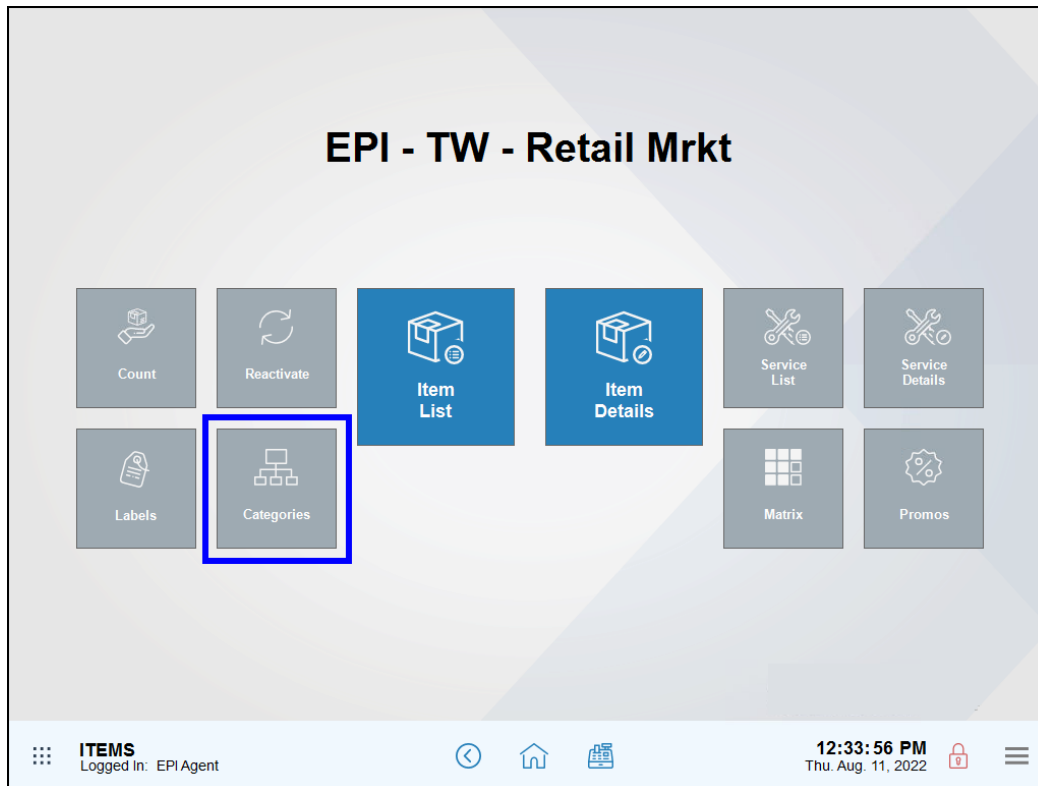
Item Details Module

Tapping the **Item Details** module displays the Item Details page, where users can create items, add categories and subcategories, and perform other functions. From **Home**, navigate to **Items > Item Details**.



Categories Module

Tapping the **Categories** module displays Categories work area, where users can create categories and subcategories. From **Home**, navigate to **Items > Categories**.



Create Categories and Subcategories

Begin building inventory by first organizing items and services into categories and subcategories. Categories and subcategories help merchants find items more easily in the Register app.

Create a Category

1. From **Home**, navigate to **Items > Categories**.
2. Tap **New Category** to start a new category.

The screenshot shows the 'New Category' form in the Exatouch software. The 'Categories' list on the left has 'Irons' selected. The 'Description' field contains 'Irons'. The 'Visible On Register' checkbox is checked. A blue box highlights the 'New Category' button in the top right corner. Other visible elements include 'Subcategories', 'On Sale' checkbox, 'Buy' field, 'Promo' dropdown, 'Value' field, 'Max Per Trx' field, 'Start Date' and 'End' date pickers, 'Daily Time Start' and 'End' time pickers, 'Exclusive for Base club' section with Club 1-7 toggle switches, and a 'Print On' section with printer selection options.

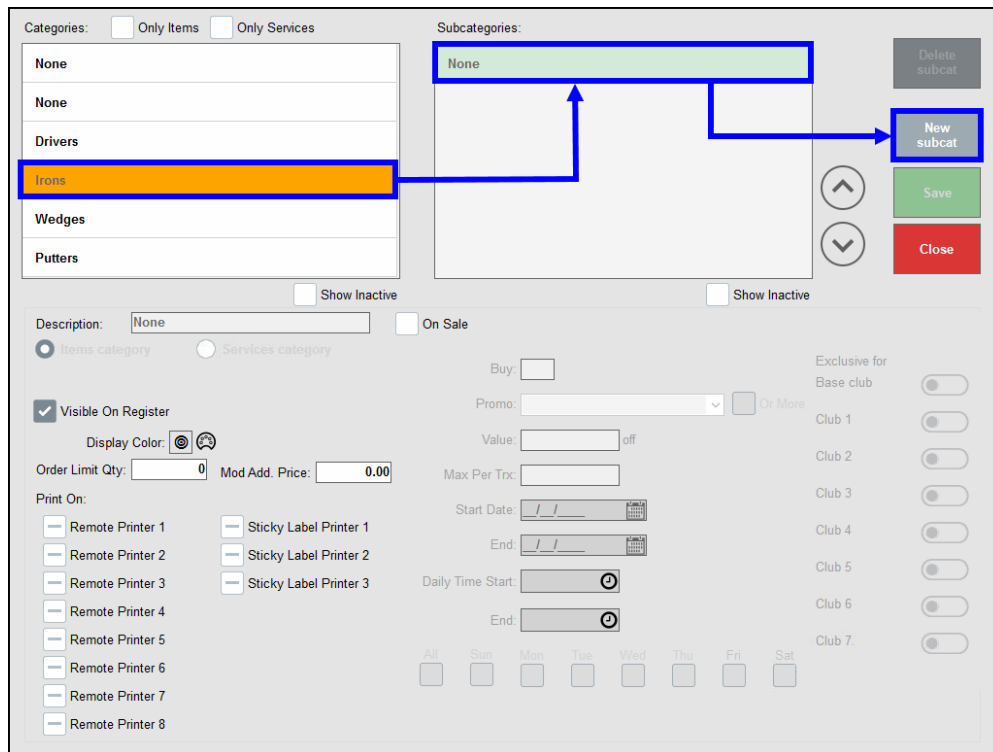
3. Enter a **Description**, and then select a category type: **Items category** or **Services category**.
4. Select the **Visible on Register** checkbox.

This screenshot is similar to the previous one but with blue boxes highlighting the 'Irons' category in the 'Categories' list, the 'Description' field containing 'Irons', and the checked 'Visible On Register' checkbox. The 'New Category' button is also visible in the top right corner.

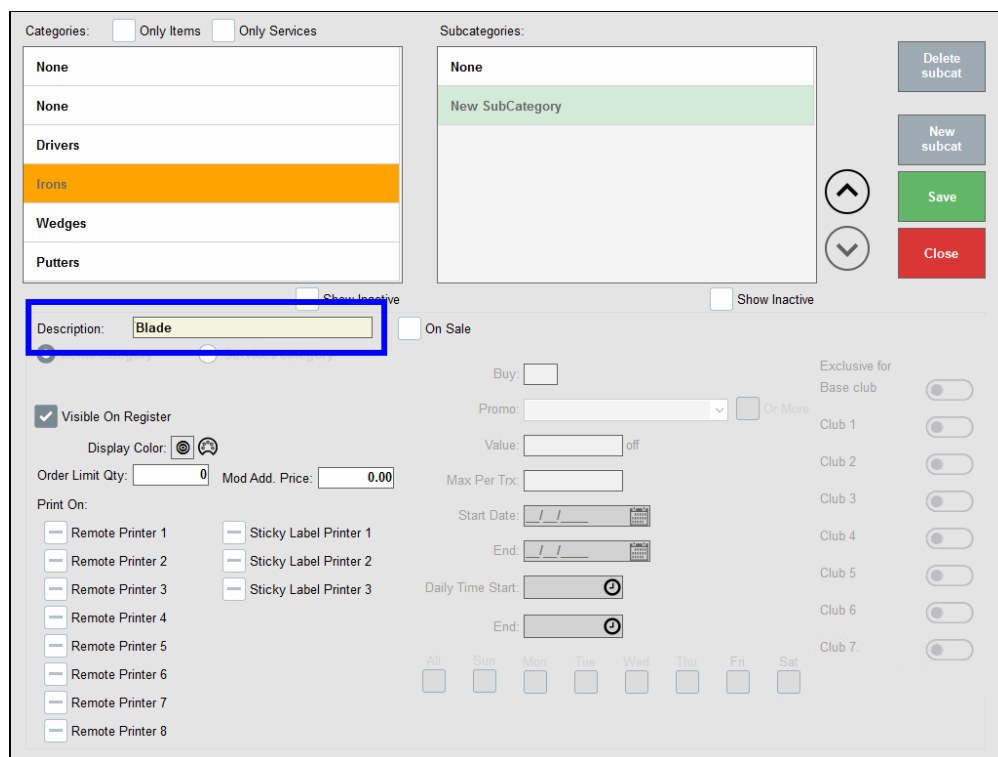
5. Tap **Save**.
6. Repeat as needed to create additional categories.

Create a Subcategory

1. From **Home**, navigate to **Items > Categories**.
2. Select a category, tap **None** in the Subcategories work area, and then tap **New subcat** to start a new subcategory.



3. Enter a **Description** name.



4. Tap **Save** to save the subcategory.
5. Repeat as needed to create additional subcategories.

NOTE: Saving a subcategory returns users to the Items screen. Tap the **Categories** module to continue adding subcategories.

Creating Root Items

After creating categories and subcategories, add root items to associate with categories and subcategories.

Add an Item

1. From **Home**, navigate to **Items > Item Details**.
2. Tap the **Details** tab.
3. Enter a SKU number in the **SKU** field or tap the **SKU icon** to auto-generate a SKU. In Exatouch, random SKU numbers are assigned to newly created items for identification purposes.

4. In the **Item Name** field, enter a name for the item. The item name populates in several fields below.

5. Enter a price in the **Price** field.

SKU * 477645708507 Item Name * TaylorMade P7MC Price * 1300.00 Margin 100.00 % Qty In Stock 0.00 Qty On Order 0.00

Details Pricing Tax & GL Promos Inventory Inventory Options Purchasing Modifiers Inventory Matrix Inventory Adjustment

Description

Button Label * TaylorMade P7MC

Receipt Description * TaylorMade P7MC

Remote Print Description * TaylorMade P7MC

Sticky Label Print Description TaylorMade P7MC

Category * Irons Subcategory * Muscle Back

Modifier

86 Item

EBT Cash EBT Food

Available Online

Stock Locations

| | |
|--|--------|
| | Delete |
| | Delete |
| | Delete |

Discontinued

Delete Inventory Movement Duplicate All Items First Item Prev Item Next Item Last Item Save Save & Add New New

NEW ITEM Logged in: Admin 09:57:41 AM Thu, Sep. 15, 2022

6. Select a **Category** and **Subcategory** (if applicable) for the item.

SKU * 477645708507 Item Name * TaylorMade P7MC Price * 1300.00 Margin 100.00 % Qty In Stock 0.00 Qty On Order 0.00

Details Pricing Tax & GL Promos Inventory Inventory Options Purchasing Modifiers Inventory Matrix Inventory Adjustment

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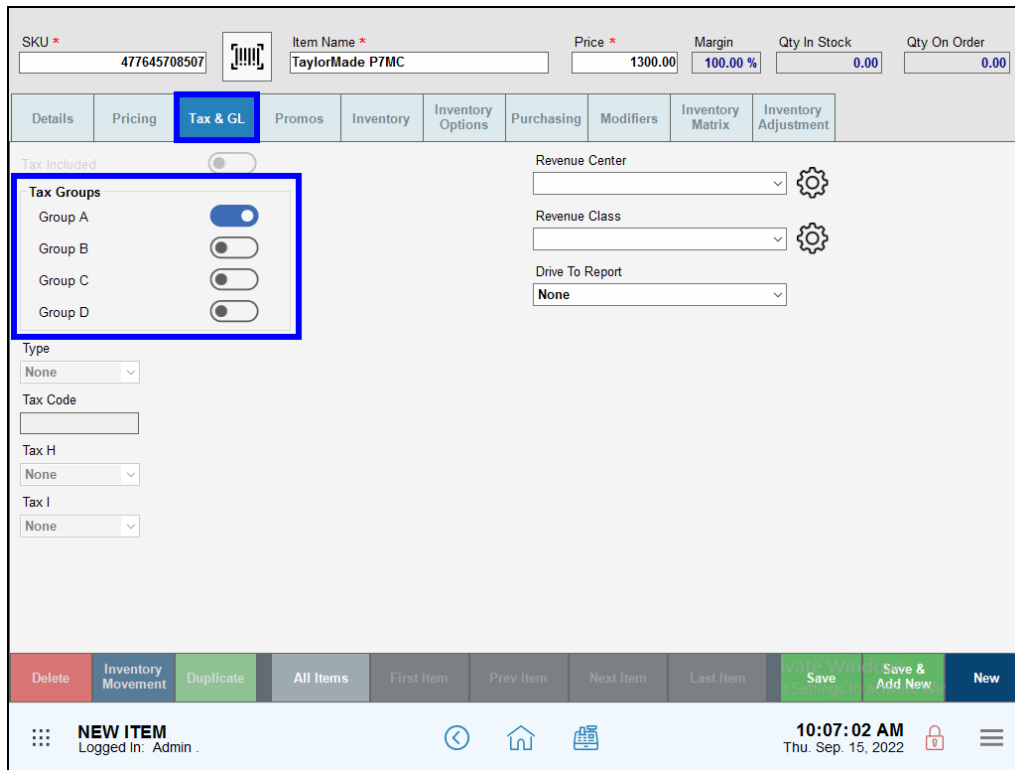
NEW ITEM Logged in: Admin 09:57:41 AM Thu, Sep. 15, 2022

7. Tap **Save**.

Set Tax Rates for Individual Items

Merchants should also verify that proper tax rates are enabled.

1. On the Item Details screen, tap the **Tax & GL** tab.
2. In the **Tax Groups** section, adjust the sliders to enable or disable desired tax settings.



3. Tap **Save**.

TIP: For detailed tax group configuration, see the [Set General Tax Rates](#) section of the Online Knowledge Base.

**Scan the QR Code to see Exatouch
Quick Reference and User Guides:**



Any questions? We're here to help! Contact our 24/7 Technical Support Team at (800) 966-5520 – Option 3 or email us at support@electronicpayments.com.