





Quick Reference Guide for Inventory Building – Retail



Technical Support: 800-966-5520 – Option 3 Exatouch® Online Knowledge Base: help.exatouch.com



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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 it does not incorporate all capabilities and features available in the Exatouch POS system.

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**.



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Count Count Labels	C Reactivate	Hem List	ltem Details	Service List Matrix	Free Breaks Details Promos
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Categories Module

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



Creating 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.

Create a Category

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



ategories: Only Items Only Services	Subcategories:		
None	None	Del Cate	ete gory
None		No	
Drivers		Cate	у догу
Irons			ve
Wedges			
Putters		(v) Cto	se
Show	Inactive	Show Inactive	
Description: Irons	On Sale		
Items category Services category	Buy:	Exclusive for Base club	
Visible On Register	Promo:	Or More	
Display Color:	Value: off	Club 2	
Order Limit Qty: 0 Mod Add, Price:	Max Per Trx:	Club 2	
Print On:	Start Date: / /	Club 3	
Remote Printer 1 Sticky Label Printe	r1	Club 4	
Remote Printer 2 Sticky Label Printe	r2	Club 5	
Remote Printer 3 Sticky Label Printe Demote Printer 4	r 3 Daily Time Start:	Club 6	
Remote Printer 5	End:	Club 7	
Remote Printer 6		d Thu Fri Sat	
Remote Printer 7			

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

Categories: Only Items Only Services	Subcategories:			
None	None		D Cat	lelete tegory
None				
Drivers			Ca	New tegory
Irons				5.70
Wedges				Juvo
Putters			(>) •	llose
Chaulantie		Show Inactive	2	
Description: Irons	On Sale			
Rems category Services category	Buy:		Exclusive for	
Visible On Register	Promo:			
Display Color:	Value: off			
Order Limit Qty: 0 Mod Add. Price:	Max Per Trx:		Club 2	
Print On:	Start Date: ///		Club 3	
Remote Printer 1 Sticky Label Printer 1	End: / / 🕅		Club 4	
Remote Printer 2 Sticky Label Printer 2 Remote Printer 2 Sticky Label Printer 2	Daily Time Start:		Club 5	
Remote Printer 4			Club 6	
Remote Printer 5			Club 7.	
Remote Printer 6				
Remote Printer 7				
Remote Printer 8				

- 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.

ategories: Only Items Only Services	Subcategories:	
None	None	Delete subcat
None	↑	
Drivers		New subcat
Irons		Save
Wedges		
Putters		Close
Show Inactive		Show Inactive
Description: None	On Sale	
Items category Services category	Buy:	Exclusive for Base club
Visible On Register	Promo:	Club 1
Display Color:	Value: off	Club 2
Order Limit Qty: 0 Mod Add. Price: 0.00	Max Per Trx:	Club 3
Print On:	Start Date:	0000
Remote Printer 1 Sticky Label Printer 1 Demote Drinter 2 Sticky Label Drinter 2	End: _/_/	Club 4
Remote Printer 2 Sucky Label Printer 2 Sticky Label Printer 3 Sticky Label Printer 3	Daily Time Start:	Club 5
Remote Printer 4		Club 6
Remote Printer 5		Club 7.
Remote Printer 6		
- Remote Printer 7		
- Remote Printer 8		

3. Enter a **Description** name.

ategories: Only Items Only Services	Subcategories:	
None	None	Delete subcat
None	New SubCategory	
Drivers		New subcat
Irons		
Wedges		
Putters		Close
Chow leasting	Show In	active
Description: Blade	On Sale	
• ····································	Buy:	Exclusive for Base club
Visible On Register	Promo:	More Club 1
Display Color: 🔘 🛱	Value: off	
Order Limit Qty: 0 Mod Add. Price: 0.00	Max Per Trx:	
Print On:	Start Date: ///	Club 3
Remote Printer 1 Sticky Label Printer 1	End: / / Mill	Club 4
Remote Printer 2 Sticky Label Printer 2		Club 5
Remote Printer 3 Sticky Label Printer 3	Daily Time Start:	Club 6
Remote Printer 4	End:	Club 7
Remote Printer 6		Sat
Remote Printer 7		
Durante Drinter 0		

- 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.

SKU * [!!!!] Item Name 477645708507 [!!!!]	se P7MC	Price * Margin Qty In Stock Qty On Order 1300.00 100.00 % 0.00 0.00
Details Pricing Tax & GL Promos	Inventory Inventory Options Purchas	asing Modifiers Inventory Adjustment
Description	^	E-WIC
	~	Show On Register
Button Label * TaylorMade P7MC	TaylorMade P7MC	Refundable Age Check
Receipt Description * TaylorMade P7MC	1	Stock Locations
Remote Print Description *		Delete
TaylorMade P/MC	Û	Delete
Sticky Label Print Description	1	Delete
Category * Subcategory *		Discontinued
Irons V Muscle Back	¥	
Modifier 86 Item		
EBT Cash EBT Food		Available Online
Delete Inventory Movement Duplicate All Items	First Item Prev Item	Next Item Last Item Save & New
NEW ITEM Logged In: Admin .	<u>ن</u> ه (۵)	09:57:41 AM Thu, Sep. 15, 2022

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



SKU * []!!	Item Name * TaylorMade P7MC		Price * 1300.00	Margin Qty In 100.00 %	0.00 Qty On	Order 0.00
Details Pricing Tax & GL	Promos Inventory Opti	ntory ons Purchasi	ng Modifiers ¹	nventory Inventor Matrix Adjustm	ry ent	
Description			E-WIC			
		^	Show On Register			
		\sim	Refundable			
Button Label * TaylorMade P7MC	TaylorMa	de	Age Check			
Receipt Description *	P/MC					
TaylorMade P7MC			Stock Locatio	ons		
Remote Print Description *				Delete		
TaylorMade P7MC		^		Delete		
		\checkmark		Delete		
Sticky Label Print Description				Delete		
Category *	Subcategory *		Discontinued			
Irons ~	Muscle Back ~					
Modifier						
86 Item						
ERT Code	EDT Food					
Delete Inventory Movement Duplicate	All Items First Item	Prev Item	Next Item	Last Item	Save & Add New	New
NEW ITEM Logged In: Admin .	0) ۵	<u></u>	09 Thu	Sep. 15, 2022	≡

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

SKU * []]	tem Name * TaylorMade P7MC		Price * Marg 1300.00 100	in Qty In Stock	Qty On Order
Details Pricing Tax & GL	Promos Inventory	Inventory Options Purchas	ing Modifiers Invento	ary Adjustment	
Description					
		^	Show On Register		
Button Label *		×	Refundable		
TaylorMade P7MC	Tayl	lorMade >7MC	Age Check		
Receipt Description * TaylorMade P7MC			Stock Locations		
Remote Print Description *			Stock Locations		
TaylorMade P7MC		^		Delete	
		~		Delete	
Sticky Label Print Description TaylorMade P7MC				Delete	
Category *	Subcategory *	_	Discontinued		
Irons ~	Muscle Back	<u> </u>			
Modifier					
86 Item					
EBT Cash	EBT Food				
Delete Inventory Movement Duplicate	All Items First Ite	em Prev Item	Next Item Last I	tem Save Ad	ave & New
NEW ITEM Logged In: Admin .		ଲ ି (୬)	<u>I</u> III	09:57:41 A Thu. Sep. 15, 20	

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 <u>Set General Tax Rates</u> section of the Online Knowledge Base.

Scan the QR code to see **Exatouch Quick Reference and User Guides**. For assistance, contact our 24/7 Technical Support Team at (800) 966-5520 – Option 3 or <u>support@electronicpayments.com</u>.

