



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

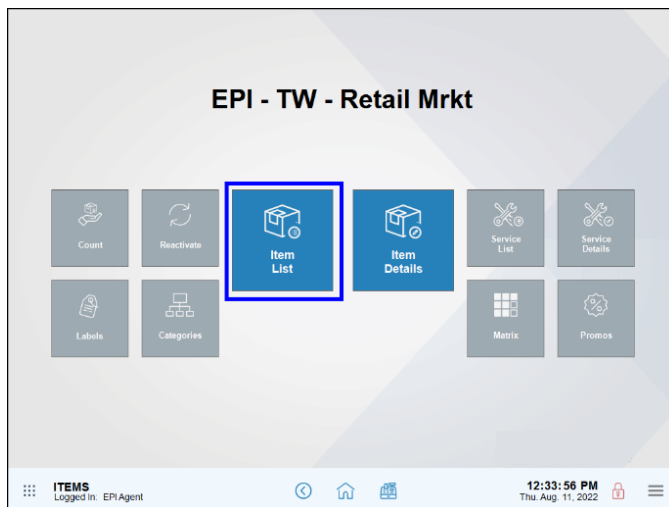
Getting Started

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.

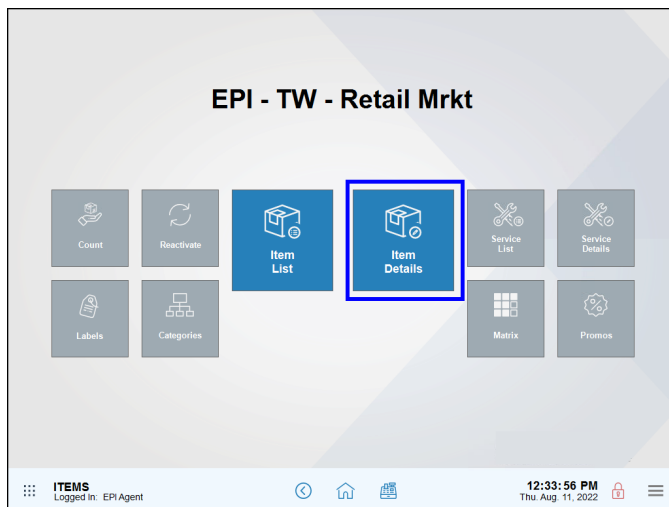
Item List Module

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



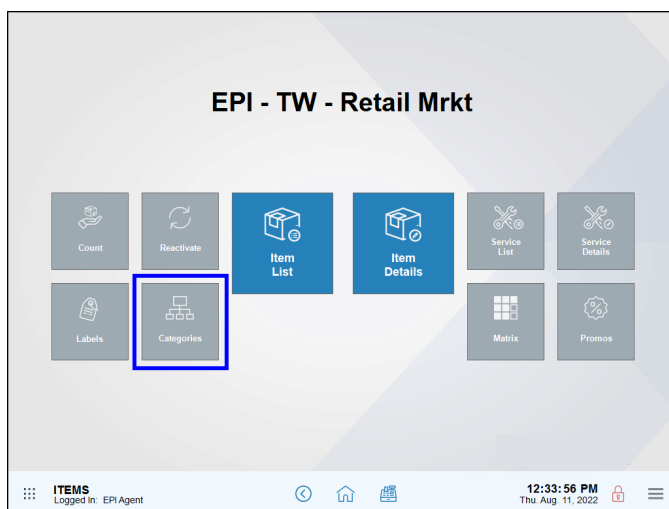
Item Details Module

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**.



Categories Module

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

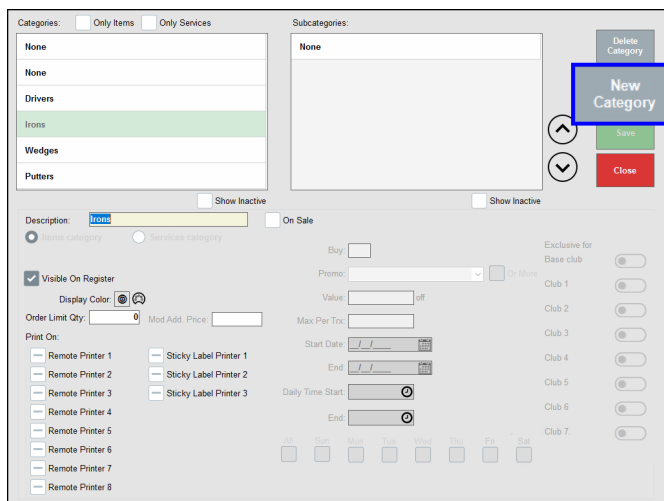


Creating Categories and Subcategories

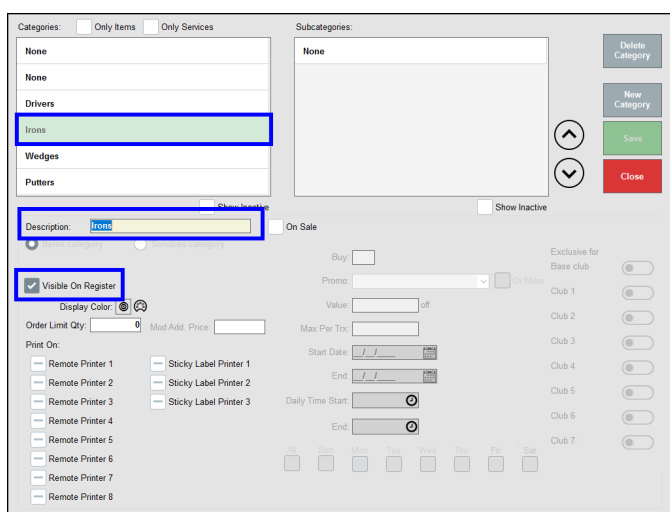
Begin building inventory by first organizing items and services into categories and subcategories. Categories and subcategories help merchants find items more easily in the Register.

Create a Category

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



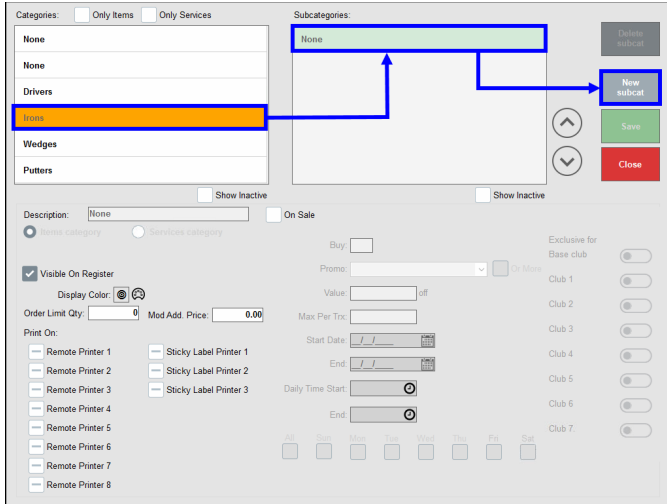
3. Enter a **Description**, and then select a category type: **Items category** or **Services category**.
4. Select the **Visible on Register** checkbox.



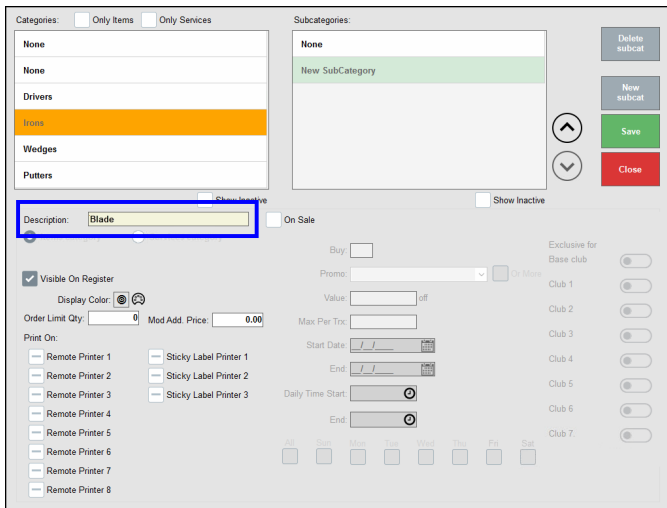
5. Tap **Save**.
6. Repeat as needed to create additional categories.

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: [Empty]

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: [Off] | 86 Item: [Off] | EBT Cash: [Off] | EBT Food: [Off] | Available Online: [Off]

Stock Locations: [Empty] | Delete | Delete | Delete

Discontinued: [Off]

Buttons: 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

Description: [Empty]

Button Label: TaylorMade P7MC

Receipt Description: TaylorMade P7MC

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Sticky Label Print Description: TaylorMade P7MC

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Stock Locations: [Empty] | Delete | Delete | Delete

Discontinued: [Off]

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

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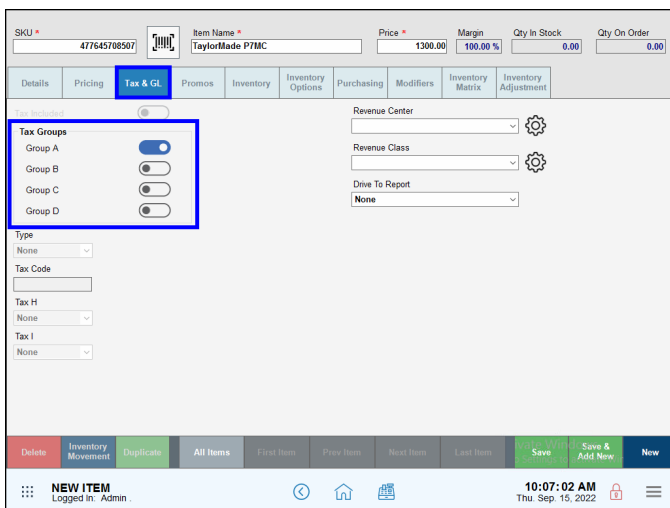
7. Tap **Save**.

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**.

For assistance, contact our 24/7 Technical Support Team
at (800) 966-5520 – Option 3 or support@electronicpayments.com.

