



Assyst POS
Item Category
Maintenance
User Guide
Version 4.09

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Introduction to Item Category Maintenance

Creation and maintenance of categories used to aid in reporting and review of performance and settings on items are key planning activities in any retail operation.

This guide covers topics specific to the creation and maintenance of category records such as **Groups**, **Departments**, and **Families**.

 **NOTE:** Using categories and item options effectively can make it easier to identify and differentiate similar products using standard Item Lookup functions and more effectively use Quick Maintenance tools.

Understanding Categories

For the purposes of this guide, the term “category” refers to options related to general categorization of products. A category could specifically refer to a Group, Department, or a Family of products.

Categories may be subject to review and reassignment as the needs of store management and/or product handlers shift. Categories may be used to classify products for reporting and identification purposes.

A **Group** is the broadest category available in Assyst Point of Sale.

A **Department** is the broadest category to which an item may be directly assigned. A Department is often a subsidiary category of a Group.

The **Family** option exists to facilitate the management of item files and reports by narrower categories than those configured as Departments and Groups.

A Sample Category Structure

Store X has the following five groups:

- | | |
|--|--|
|  Home Health Care |  Confectionery |
|  Pharmacy |  Giftware |
|  Sundries | |

The following six departments are set as members of the Home Health Care group:

- | | |
|---|---|
|  First Aid |  Bathroom Safety |
|  Mobility |  Medical Supplies |
|  Braces/Fittings |  Home Health Appliances |

Several families are linked to the First Aid department:

- | | |
|--|--|
|  Bandages |  Lotions & Linaments |
|  Sterilizing agents |  Heat packs |
|  Disposable gloves |  Cold compresses |

A box of bandaids assigned to the First Aid department may be subject to reporting as part of the Bandages family, the First Aid department, and/or the Home Health Care group.

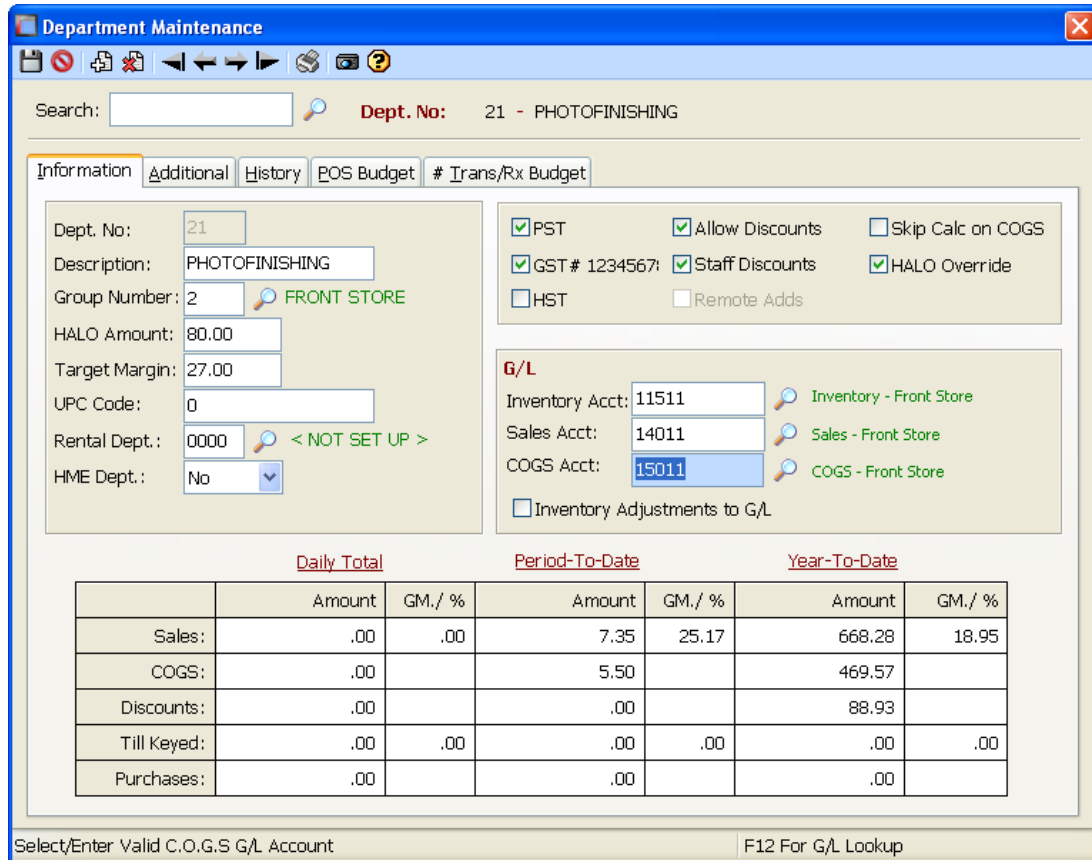
Category assignments may also be used to search for products with common characteristics. For more information about broader category and attribute searches relating to item file organization, consult the Item Quick Maintenance guide.



Departments

A **department** is used as the primary reporting category for the purposes of summarizing sales activity, and may be used to create other types of summaries in Assyst Point of Sale.

To access **Department Maintenance**, click on  **Department** in the **Maintenance** section of **POS Functions** located on the ribbon.



Search: **Dept. No:** 21 - PHOTOFINISHING

Information Additional History POS Budget # Trans/Rx Budget

Dept. No: 21
 Description: PHOTOFINISHING
 Group Number: 2 FRONT STORE
 HALO Amount: 80.00
 Target Margin: 27.00
 UPC Code: 0
 Rental Dept.: 0000 < NOT SET UP >
 HME Dept.: No

☒ PST ☒ Allow Discounts ☐ Skip Calc on COGS
☒ GST # 1234567 ☒ Staff Discounts ☒ HALO Override
☐ HST ☐ Remote Adds

G/L
 Inventory Acct: 11511 Inventory - Front Store
 Sales Acct: 14011 Sales - Front Store
 COGS Acct: 15011 COGS - Front Store
☐ Inventory Adjustments to G/L

	Daily Total		Period-To-Date		Year-To-Date	
	Amount	GM./ %	Amount	GM./ %	Amount	GM./ %
Sales:	.00	.00	7.35	25.17	668.28	18.95
COGS:	.00		5.50		469.57	
Discounts:	.00		.00		88.93	
Till Keyed:	.00	.00	.00	.00	.00	.00
Purchases:	.00		.00		.00	

Select/Enter Valid C.O.G.S G/L Account F12 For G/L Lookup

Adding a Department

A new department may be added by clicking the  icon in Department Maintenance.

Assign a department number to the new department category. This department number must not be in use by another department in the system.

NOTE: Use of a consistent department structure is recommended. Be sure to consider existing department numbers including ranges and numbering conventions when creating a new department category.

After a new department number has been assigned, continue to set or select any of the following options as appropriate:

Description – Enter the Description for the department. This description will appear on any summarized reports referencing items assigned to the department.

Department Maintenance

Search: **Dept. No:** 21 - PHOTOFINISHING

Information Additional History POS Budget # Trans/Rx Budget

Dept. No: 21
 Description: PHOTOFINISHING
 Group Number: 2 **FRONT STORE**
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 Rental Dept.: 0000 **< NOT SET UP >**
 HME Dept.: No

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 Inventory Acct: 11511 **Inventory - Front Store**
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	Daily Total		Period-To-Date		Year-To-Date	
	Amount	GM./ %	Amount	GM./ %	Amount	GM./ %
Sales:	.00	.00	7.35	25.17	668.28	18.95
COGS:	.00		5.50		469.57	
Discounts:	.00		.00		88.93	
Till Keyed:	.00	.00	.00	.00	.00	.00
Purchases:	.00		.00		.00	

Select/Enter Valid C.O.G.S G/L Account F12 For G/L Lookup

Group Number – Select the group to which the department belongs.

NOTE: If no group is defined, the department total will not be included in Group Totals on daily department summary reports. For more information about Groups, consult the section of this guide entitled **Group Maintenance**.

HALO Amount – The HALO refers to a High Amount Lock Out.

NOTE: HALOs are meant to alter cashiers to possible errors when entering product sale values at the till. A HALO may also be applied as a cap to limit the maximum value of products sold at the till.

Target Margin – Enter the target margin for products sold using this category.

NOTE: A target margin is used by the system to estimate cost of sales for products sold by category as opposed to sales of specific products configured in Item Maintenance.

UPC Code – This option may be used in conjunction with electronic data extract creation. If configured to contain a pseudo UPC code, the system will display that UPC code in extracts involving open department sales for the selected department.

Rental Dept. – This field is only available to licensed users of the optional Assyst Home Medical Equipment module. Licensed users may consult the Assyst Home Medical Equipment User Guide for more information about this setting.

HME Dept. – This field is only available to licensed users of the optional Assyst Home Medical Equipment module. Licensed users may consult the Assyst Home Medical Equipment user's guide for more information.



Tax Options – Select (check off) any taxes typically applicable to products in this category. The tax options are pictured with the labels PST, GST and HST in the sample department.

Allow Discounts – Select this option if discounts are typically allowed on products assigned to this category.

 **NOTE:** Sales of products by department are subject to the standard settings defined on the selected department file. Item files contain some of the same options available on the department. If the settings on an item do not agree with those on the department, the item-specific settings are used.

Allow Staff Discounts – Select this option if staff members are eligible for discounts on products in this category.

 **NOTE:** This option applies when the 33 Action Code is invoked at the till, and applies to all products in the category. If staff discounts are entered using other means, this option will not be considered.

Remote Adds – This option is only available to licensed users of the Assyst Multistore module. Licensed users may consult the Assyst Multistore User Guide for more information about this setting.

Skip Calc on COGS – By default, this option is not selected. This ensures that if a product appears on file with a cost of \$0.00, an estimated cost of sale will be calculated for reporting and accounting integration based on the department target margin. If this option is selected, items with a cost of 0 will not be subject to calculation of an estimated cost of sale.

 **NOTE:** The cost of sale for most items sold in Assyst Point of Sale are reported based on Average Cost on the relevant item file at the moment of sale. Serialized products are exempted from this rule, as the cost may be traced to a specific serial number. Other products may be subject to cost estimation depending on the Skip Calc on COGS setting.

HALO Override – If selected, an amount in excess of the HALO Amount may be subject to supervisor override at the till. If the option is not selected, overrides relating to the selected department can not be performed by anyone.

G/L Section

The G/L section of Department Maintenance is only applicable to licensed users of Assyst General Ledger (occasionally abbreviated as GL or G/L) and/or Assyst GL Reports.

If you are a licensed user of Assyst GL, all departments must have a valid **Inventory, Sales, and Cost of Sales** G/L account. Incorrect journal entries may be transferred to the ledger if these options are not configured properly.

If appropriate, the **Inventory Adjustments to G/L** may be checked off. This flag should be consistently applied across all departments in Assyst Point of Sale.

For more information about Inventory Adjustments to G/L, consult the Transfers & Adjustments User Guide.

Additional Settings

On the **Additional** tab in Department Maintenance, further options are available to manage the behaviour of the department.

Department Maintenance

Search: **Dept. No:** 21 - PHOTOFINISHING

Information **Additional** History POS Budget # Trans/Rx Budget

☒ **Reference**

☐ Variable Length

Number of Characters: 8

Reference Format: AAB99999

Reference Label: PICKUP ID#

Reference Message: ENTER PICKUP ID BELOW

Allow Price Change: Y

Press F12 for Lookup.

If a Reference number or ID is required for the sale of products in this category, check off the **Reference** box. If selected, further options relating to the behaviour of the reference number will become available.

Variable Length – If checked, the reference number may be set to use a variable number of characters.

Number of Characters – Select the length of the reference number required for sales in this department, or the maximum reference number length if a variable length reference number applies.

Reference Format – Indicate the format to be used for the reference number.

Use the **A** to indicate that an alphabetic character is required.

Use the **9** to indicate that a numeric character is required.

Use the **X** to indicate that an alphabetic or numeric character may be used.

Use the **B** to indicate that a blank is expected at this location in the reference number.

Reference Label – Set a label to appear onscreen to help the cashier identify the appropriate reference number for entry. For example, if photofinishing pickup IDs are used, the label might be set as "Pickup ID #".



Reference Message – Set an extended message to help cashiers identify the appropriate reference number to be entered. Using the previous example of photofinishing pickup IDs, the message may be set to “Enter the Pickup ID below”.

If price changes are permitted for products in this department upon sale at the till, set the **Allow Price Change** option to **Y**. To disallow price changes on products in this category, set this option to **N**.

Modifying a Department

Enter a department number or description in the **Search** bar near the top of the window.

When searching by description, multiple matches may be found. If so, a list of matching records will be displayed to aid in selection of the desired department.

A list of departments may be displayed by clicking on the  icon to the right of the Search bar.

Upon selecting a department for review, the system will display relevant settings.

Any settings which may be set while creating a department are available for modification after the department has been created, with the exception of the department number.

 **NOTE:** Changing settings used as defaults such as tax and customer discount options will NOT result in changes to existing item files. The defaults would be in effect at the time changes are saved and will only apply to any new products created thereafter.

Department Histories

Department activity details are available in two locations on the Department file: the Department Information tab and the History tab.

Information Tab

At the bottom of the Information tab, daily, period to date, and fiscal year to date sales are reported in summary form.

	<u>Daily Total</u>		<u>Period-To-Date</u>		<u>Year-To-Date</u>	
	Amount	GM./ %	Amount	GM./ %	Amount	GM./ %
Sales:	.00	.00	7.35	25.17	668.28	18.95
COGS:	.00		5.50		469.57	
Discounts:	.00		.00		88.93	
Till Keyed:	.00	.00	.00	.00	.00	.00
Purchases:	.00		.00		.00	

The details available include the dollar value of Sales, Cost of Goods Sold, Discounts, and Till Keyed totals. Gross margin percentages are also displayed for total sales and till keyed sales.

The totals are offered in summary for the department since the last End of Day (**Daily Total**), since the last Period End type End of Day (**Period-To-Date**) and since the last Year End type End of Day (**Year-To-Date**).

The **Purchases** fields are not currently used.



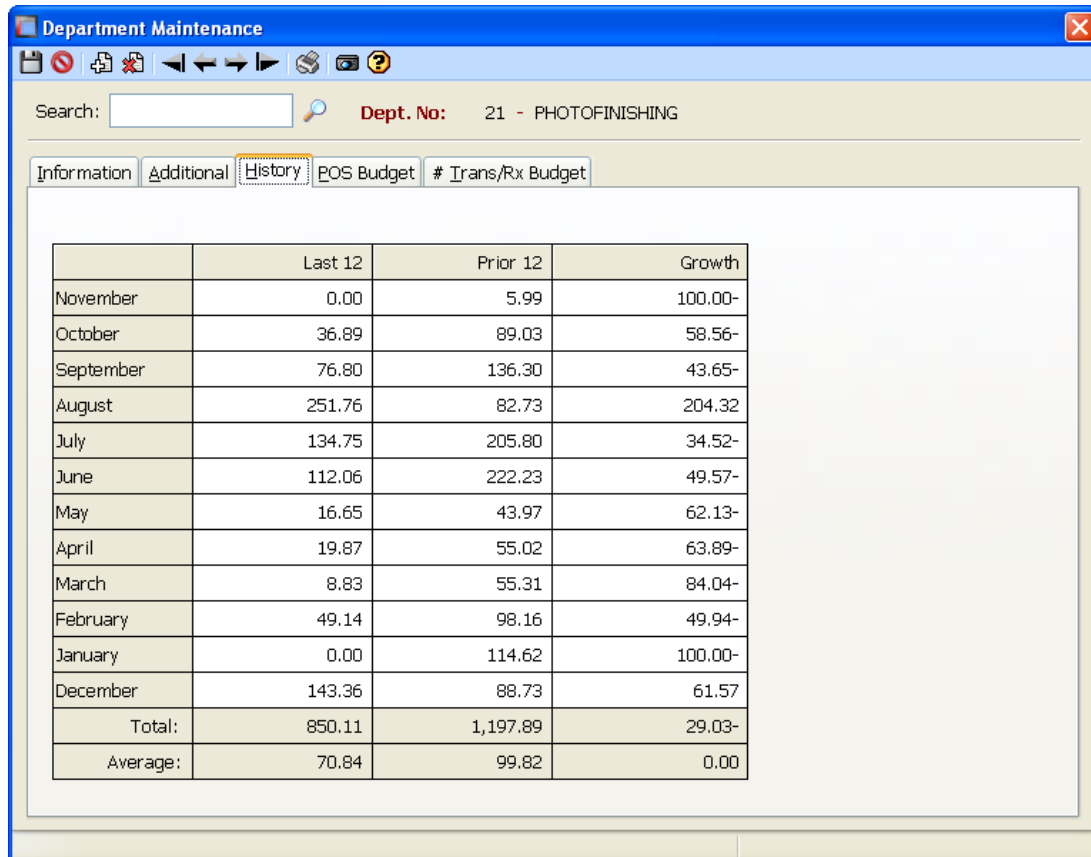
History Tab

The History tab in Department Maintenance offers detailed breakdowns of sales by period for the last 24 months.

Growth figures are also displayed which compare the most recently completed 12 fiscal months to the preceding 12 fiscal months to aid in performance analysis.

Figures displayed on the History tab refer to sales revenue by fiscal period.

Growth values are stated as a percentage of the prior year's sales.



	Last 12	Prior 12	Growth
November	0.00	5.99	100.00-
October	36.89	89.03	58.56-
September	76.80	136.30	43.65-
August	251.76	82.73	204.32
July	134.75	205.80	34.52-
June	112.06	222.23	49.57-
May	16.65	43.97	62.13-
April	19.87	55.02	63.89-
March	8.83	55.31	84.04-
February	49.14	98.16	49.94-
January	0.00	114.62	100.00-
December	143.36	88.73	61.57
Total:	850.11	1,197.89	29.03-
Average:	70.84	99.82	0.00

In the above example, this department performed exceptionally well in August of the current year when compared to August of last year. Sales revenues were 204.32%, or two times, greater than those sales last year.

Overall for the year, the department has not performed as well. In fact, sales revenue has dropped by 29.03% as indicated by the table.



Department Sales Budgeting

Assyst Point of Sale supports the entry of budgeted sales and margins to allow for easy comparison to actual sales activities. These details may be entered on the **POS Budget** tab.

Department sales targets may be entered in dollar values along with margin targets for the department.

NOTE: The system will only retain dollar values entered to the left of a decimal point. Values to the right of a decimal point will be discarded when saving the department record.

Department Maintenance

Search: Dept. No: 21 - PHOTOFINISHING

Information Additional History **POS Budget** # Trans/Rx Budget

	Current		Last Year	
	Dollars	Margin	Dollars	Margin
January	58	20.00	53	20.00
February	58	20.00	53	20.00
March	58	20.00	53	20.00
April	58	20.00	53	20.00
May	150	20.00	120	20.00
June	150	20.00	120	20.00
July	200	20.00	150	20.00
August	200	20.00	150	20.00
September	58	20.00	53	20.00
October	58	20.00	53	20.00
November	58	20.00	53	20.00
December	58	20.00	53	20.00
Total:	1,164	0.00	964	0.00
Average:	97	20.00	80	20.00

— Misc —

To Copy All

Divide Equally

Copy Current to Last Year:

☒ Just this One ☐ All Departments

Copy to Last Year

Using POS Budget Misc. Buttons

The POS Budget Misc. buttons offer aids to filling out the sales budget details for one or more departments.

The top two buttons, **To Copy All** and **Divide Equally**, are only available for use when the first fiscal period is highlighted in either the Current or Last Year column.

To Copy All will copy the value in the first listed period to all periods for the fiscal year highlighted.

Divide Equally will divide the value in the first listed period by 12 and round the quotient to the nearest dollar. This newly calculated value is then placed in each of the 12 periods for the fiscal year selected.

The **Copy to Last Year** button function will copy the current year's monthly budget figures to the last year column. How broadly this is applied will depend on the Copy Current to Last Year option.

If **Just this One** is selected, only budgeted values for the current department will be copied.

If **All Departments** is selected, budgeted values for all departments will be copied.



Prescription Activity Budgeting

Assyst Point of Sale supports the entry of budgeted pharmacy transactions and prescriptions. It is possible to enter estimated numbers of transactions and prescriptions along with budgeted average values for each period as an aid to budgeting.

Though this tab appears on all departments, it is only to be used with the Pharmacy department at locations utilizing pharmacy integration.

NOTE: Average values per prescription/transaction (Avg/\$) may include a decimal point.

Department Maintenance

Search: Dept. No: 37 - PHARMACY

Information Additional History POS Budget # Trans/Rx Budget

	Transactions		Prescriptions	
	Number	Avg/\$	Number	Avg/\$
January	117	37.40	175	25.00
February	117	37.40	175	25.00
March	117	37.40	175	25.00
April	117	37.40	175	25.00
May	117	37.40	175	25.00
June	117	37.40	175	25.00
July	117	37.40	175	25.00
August	117	37.40	175	25.00
September	117	37.40	175	25.00
October	117	37.40	175	25.00
November	117	37.40	175	25.00
December	117	37.40	175	25.00
Total:	1,404	0.00	2,100	0.00
Average:	117	37.40	175	25.00

— Misc —

To Copy All

Divide Equally

Using Rx Budget Misc. Buttons

The Rx Budget Misc. buttons offer aids to filling out the sales budget details for a whole year.

The two buttons, **To Copy All** and **Divide Equally**, are only available for use when the first fiscal period is highlighted in either the Current or Last Year column.

To Copy All will copy the value in the first listed period to all periods for the fiscal year highlighted.

Divide Equally will divide the value in the first listed period by 12 and round the quotient to the nearest dollar. This newly calculated value is then placed in each of the 12 periods for the fiscal year selected.



Deleting a Department

A Department may be deleted within Department Maintenance using the  icon.

Department Deletion – Considerations

When considering a department for possible deletion, it is recommended that some analysis be performed in advance.

First confirm that the department has had no sales during the current fiscal year. This may be reviewed in the **Year-to-Date** column on the Information tab. Departments with sales recognized during the current fiscal year may not be deleted.

Departments with sales in prior years may be deleted. If they are, the details tied to the department will no longer appear in reports such as the Department Comparison and Operating Comparison.

Be sure to confirm that any items assigned to the department to be deleted are reassigned to valid departments. If this task is not performed and an item remains assigned to the deleted department, the system will not allow its sale. An attempt to sell such an item at the till will result in the appearance of a **NO DEPT# ON ITEM** error.

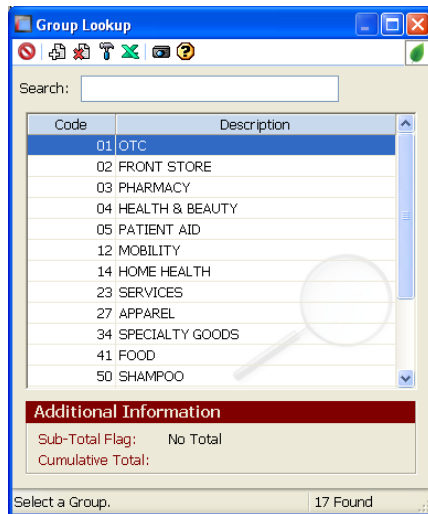
A valid department is required on each and every item file to ensure that sales reporting comprehensively includes details of all sales activity. Performing an override will not circumvent this requirement.

Group Maintenance

Group definitions are available in Assyst Point of Sale to facilitate the creation of reports which provide a broader view than those offered than those summarized by department or family.

To access Group Maintenance, either click on the  icon next to the **Group** option in Department Maintenance.

NOTE: Group Maintenance may also be accessed from **Lookups**, found in the Miscellaneous section of the POS Functions ribbon group.

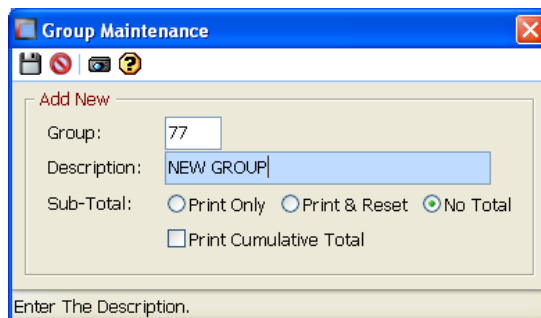


To **modify** any selected group, highlight it and click on the  icon.

To **create a new group**, click on the  icon.

Adding a Group

All groups require a numeric **Group Code** upon creation.



After the new Group Code is set, specify the **Description** for the new group. This description will appear as a label for all values summarized from assigned departments.

At the **Sub-Total** option, the system requires a setting to indicate whether a sub-total is to follow the appearance of this department on a report.

If the sub-total is meant to print and continue to accumulate, select **Print Only**.

If the sub-total is meant to print and reset any cumulative totals, select **Print & Reset**.

If the appearance of a sub-total is not desired, select **No Total**.



If a sub-total is expected to appear, the content of the sub-total may be determined by the selection or deselection of the **Print Cumulative Total** option.

If selected, the sub-total displayed will contain a total of the present group total and any preceding sub-totals not reset.

If deselected, the sub-total will contain only details of the current department.



NOTE: All options excepting the Group Code may be changed after creation using the **Modify** button.



Family Maintenance

Families in Assyst Point of Sale refer to a category of items which is fairly narrowly defined.

This optional category structure may be used to facilitate more focused lookups in Item Quick Maintenance and more detailed summary reporting where Family reporting options exist.

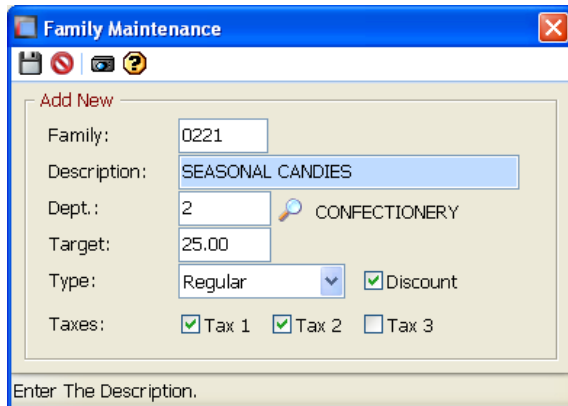
Family Maintenance may be accessed by clicking on the  icon in Item Maintenance.

NOTE: Family Maintenance may also be accessed from **Lookups**, found in the Miscellaneous section of the POS Functions ribbon group.

Adding a Family

Within Family lookup, a new Family category may be added by clicking on the  icon in Family Maintenance.

New families require the creation of an alphanumeric **Family Code**. These codes may be used to categorize items belonging to the family.



Often, families are consistently used with a particular department. To facilitate easy selection, many users will adopt a family numbering scheme which incorporates department numbers as part of the family code.

The example above illustrates such a scenario, where all products in the new family will also belong to a single department. Thus the department 2 is incorporated into the family code by using "02" as the first two digits in the family code.

After the Family Code has been defined, a **Description** may be set. Description labels will appear on any item records linked to the family and on any reports offering summaries by Family category.

A **Department** may optionally be set. Typically families are treated as subsidiary categories to departments, so it is often the case that a family would be linked to a department.

NOTE: Configuration options exist which can facilitate the definition of Families first or only as opposed to departments in Item Maintenance. In this scenario, time may be saved by linking families to departments while ensuring that appropriate families are defined on all new item records.

Target Margins may also be set, which may be applied to new items or items newly assigned to the family. This allows the definition of more finely-tuned target margins on new products than may be available within a department where margins vary greatly among different subcategories.



An item **Type** may be used to define a standard item type applicable to the majority of products in the category.

 **NOTE:** The majority of items should be configured as **Regular**. **Gift Card** and **Card Reload** types may only be used by licensed users of integrated debit/credit by Chase Paymentech. Gift cards not furnished by Chase Paymentech are to be configured as Regular. Further item type options are available to licensed users of Assyst HME. For more information about these options, consult the Assyst HME user guide.

A standard **Discount** flag may be set on the Family file. If checked off, customer discounts are automatically allowed on new items assigned to this family. If unchecked, discounts are not automatically allowed on new items assigned to this family.

Default **Taxes** may also be set on a family record. Items assigned to the family, by default, will be subject to any taxes selected by checking the applicable box.

 **NOTE:** Default discount, target margin, item type and tax settings defined on the family file will be used as defaults for any new products added to the family. These settings may be modified at any time, though settings on items previously created within the family will remain unaffected.

Other Category Types

Additional category types are available for selection on item files where applicable and desired.

Typically, **Manufacturer** and **Brand** categories are used to offer more definition to item files to uniquely identify products bearing a particular brand name or manufacturer name.

Manufacturer Maintenance

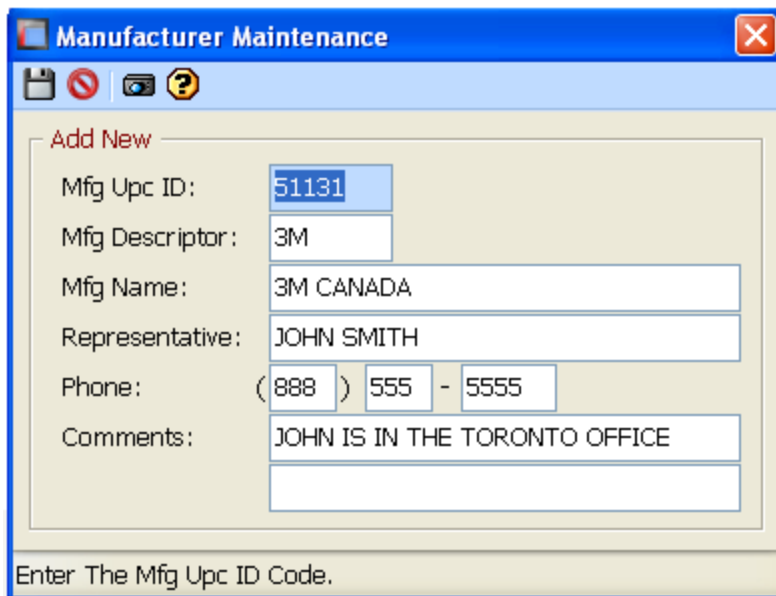
Manufacturer Maintenance may be accessed by clicking on the  icon next to the **Manufacturer** option found in any record in Item Maintenance.

NOTE: Manufacturer Maintenance may also be accessed from **Lookups**, found in the Miscellaneous section of the POS Functions ribbon group.

Adding a Manufacturer

A new Manufacturer may be added by clicking on the  icon in Manufacturer Maintenance.

Manufacturers may be automatically set by Assyst Point of Sale on item files where the 5 digit UPC identifier for a manufacturer is known.



The screenshot shows a window titled "Manufacturer Maintenance" with a toolbar containing icons for save, delete, add, and help. The "Add New" section contains the following fields:

- Mfg Upc ID: 51131
- Mfg Descriptor: 3M
- Mfg Name: 3M CANADA
- Representative: JOHN SMITH
- Phone: (888) 555 - 5555
- Comments: JOHN IS IN THE TORONTO OFFICE

At the bottom of the window, there is a text prompt: "Enter The Mfg Upc ID Code."

After creating the Manufacturer record, start by keying in the **Mfg Upc ID**.

Next specify a **Mfg Descriptor**. This descriptor is meant to contain an abbreviated code for the manufacturer which may be applied to all products manufactured by the same company regardless of UPC code.

Key in other information about the manufacturer such as the full **Mfg Name**.

A **Representative** field may be used to enter the name of a primary contact for the manufacturer, if known.

The **Phone** field may be used to enter the telephone number of the vendor or their representative.

Comments relevant globally to the manufacturer may also be entered in the two fields provided.

Modifying a Manufacturer

In the Manufacturer lookup, highlight the manufacturer to be modified and click on the  icon.

Any option, excepting the Mfg Upc ID, may be modified.

Understanding Manufacturer UPC IDs

On any industry compliant, globally accepted UPC code, each set of digits in a UPC barcode are used to identify product characteristics.



In the graphic to the left are the **Check Digits**, which are underlined in red.

Underlined in blue is the **Manufacturer UPC Identifier (Mfg Upc ID)**. These five digits are used exclusively by a single manufacturer.

Underlined in green is the **Item Identifier**. This uniquely identifies the item within the context of the manufacturer identifier.

NOTE: Standard Manufacturer Identifiers are assigned to manufacturers by GS1 (formerly EAN International). Some manufacturers may utilize multiple Manufacturer Identifier codes, though no other manufacturer may use codes assigned to another manufacturer by GS1.

Brand Maintenance

In the retail world, often the manufacturer UPC ID code may not be enough to distinguish the product from other similar products.

Especially where large manufacturers are involved, such as Procter & Gamble, many similar products may be manufactured using different branding.

For example, Procter & Gamble™ uses a few different brands to market hair colour products:

- Clairol™
- Herbal Essences™
- Nice 'n Easy™

It may be desirable to search for hair colour products by the brand as opposed to the UPC ID code(s). The **Brand** field in Item Maintenance may be used to generate reports and/or to search for products by brand.

To access **Brand Maintenance**, click on the  icon to the right of the **Brand** option in Item Maintenance.

NOTE: Brand Maintenance may also be accessed from **Lookups**, found in the Miscellaneous section of the POS Functions ribbon group.

Adding a Brand

To add a brand, click on the  icon in **Brand Lookup**.

Enter the **Brand Name**.

NOTE: Brands may also be added to Item Maintenance directly by entering a previously unused brand name in the Brand field.

Brand descriptions listed in Brand Lookup may be modified by highlighting the desired brand and clicking the  icon.

