# QUICK REFERENCE GUIDE

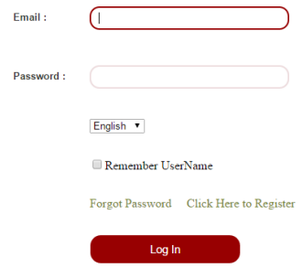
## SMART 360 POS™

## Adding Inventory

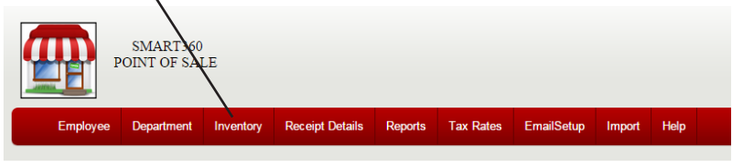
**This feature provides the business the option to manually enter inventory items – single or multiple.**

**Refer to Importing Inventory Quick Reference Guide, to upload inventory utilizing an excel file**

1. Open your web browser. Go to http://backoffice.smart360pos.com.
2. Enter the email and password provided, followed by clicking the **Login** button.




3. Select **Inventory** from the main screen option

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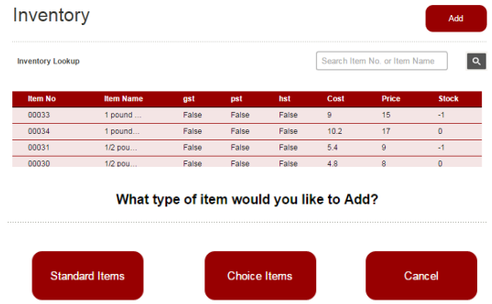
**Inventory can be set up utilizing Standard or Choice items**

**A) Standard Items:** Regular inventory item

**B) Choice Items:** Items with the same bar code or different choices within a bar code (example Small, Medium, Large)

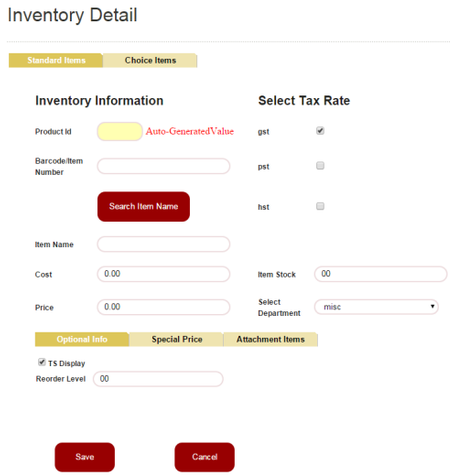
## A) Adding Inventory - Standard Items

1. Click the **Add button**.




2. Select **Standard Items**.

3. Enter the product information, select the tax rate applicable to this item and select from the drop down bar, the department to be assigned for this inventory item. When complete press the **save** button.



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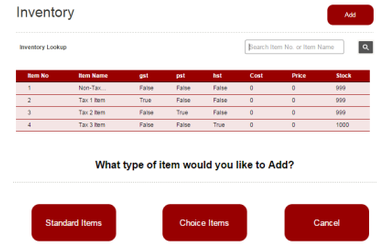
Step 1
Adding Inventory
Time: 5 (+) Minutes
Tools: No Tools Required
Difficulty: Easy

## B) Adding Inventory - Choice Items

**Choice items provide the option to add a sub-menu of items that are all the same item but perhaps a different size. For example, you may sell French Fries in three different sizes – small, medium and large. You however would like to simplify the entry process, by having one button for French Fries and within the French Fries selection the choice of Small, Medium and Large. The example below demonstrates how to set up a choice feature for French Fries.**

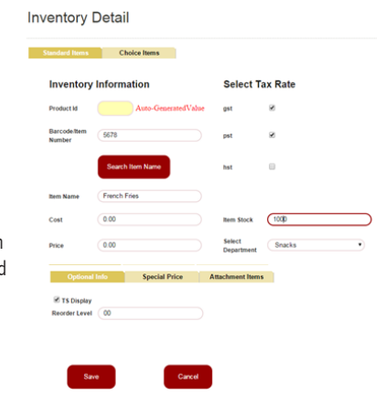
**In order to 'link' the different sized variables (Small, Medium, Large), you must first create each item separately as a standard item. Once complete, the choice item feature is utilized to link the items.**

1. Click the **Add** button.




2. Select **Standard Item**.

3. Create the main item (in this example French Fries). Ensure the same barcode item number is used for the main item and the different variables (Small, Medium, Large). Enter the product information, select the tax rate applicable to this item and select from the drop down bar, the department to be assigned for this inventory item. When complete press the **Save** button.




**Note:** for Choice Items, it is recommended that you enter a large number for Item Stock, as otherwise. You will be alerted to low inventory.

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Adding Inventory

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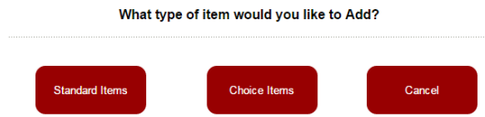
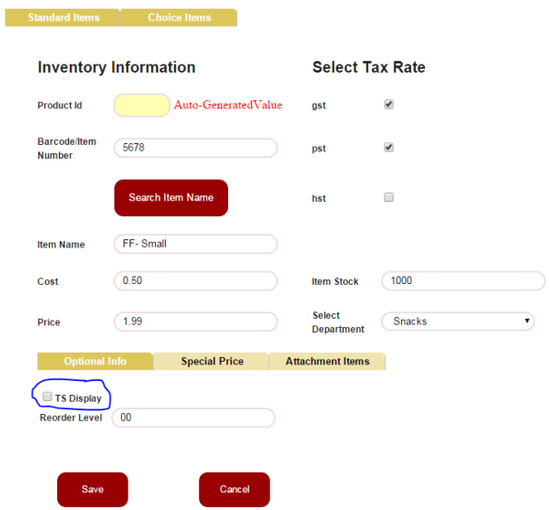
Tools: No Tools Required

Difficulty: Easy

4. Repeat the same steps for the first variable. Select **Standard item**.




5. Create the first variable. (In the example below, French Fries – Small is being created). Ensure that the barcode item number is the same as the barcode created in Step 3. Enter the product information, select the tax rate applicable to this item and select from the drop down bar, the department to be assigned for this inventory item. Uncheck the TS Display button. When complete press the **save** button.



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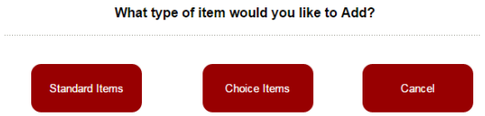
Time: 5 (+) Minutes

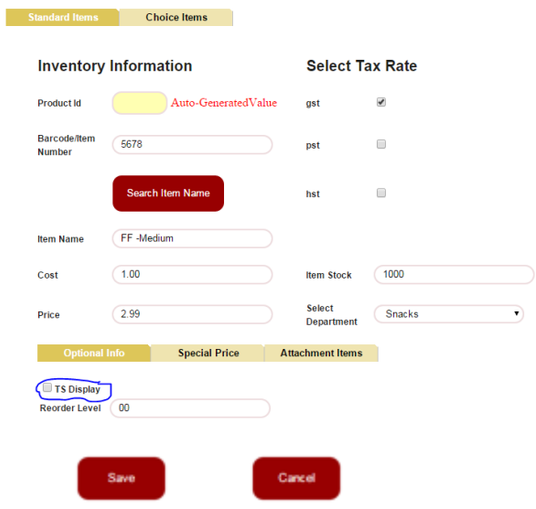
Tools: No Tools Required

Difficulty: Easy

6. Repeat the same step second variable. Select **Standard item**.




7. Create the 2nd variable. (In the example below, French Fries – Medium is being created). Ensure that the barcode item number is the same as the barcode created in Step 3. Enter the product information, select the tax rate applicable to this item and select from the drop down bar, the department to be assigned for this inventory item. Uncheck the TS Display button. When complete press the **save** button.



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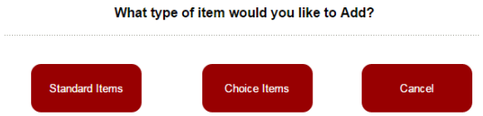
Time: 5 (+) Minutes

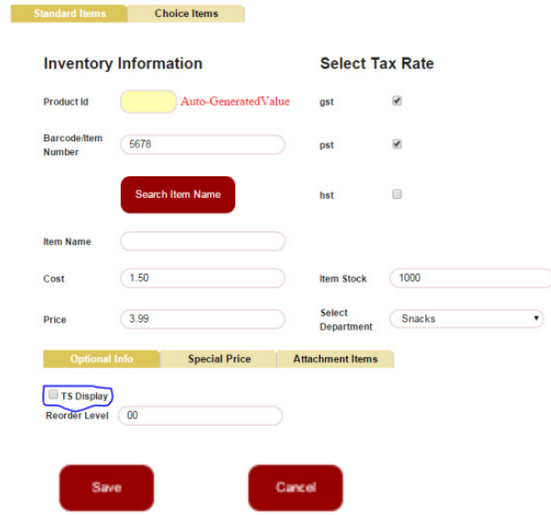
Tools: No Tools Required

Difficulty: Easy

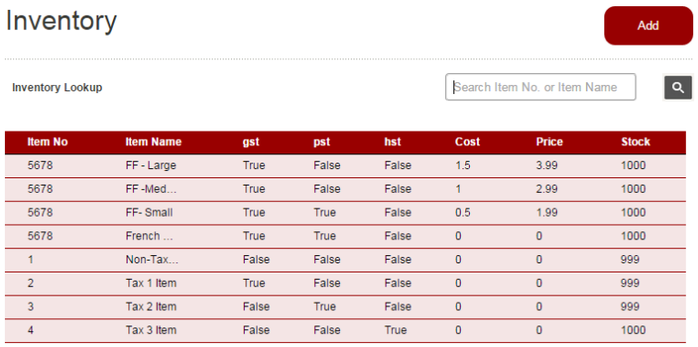
8. Repeat the same step for the third variable. Select **Standard item**.




9. Create the third variable. (In the example below, French Fries– Large is being created). Ensure that the barcode item number is the same as the barcode created in Step 3. Enter the product information, select the tax rate applicable to this item and select from the drop down bar, the department to be assigned for this inventory item. Uncheck the TS Display button. When complete press the **save** button.

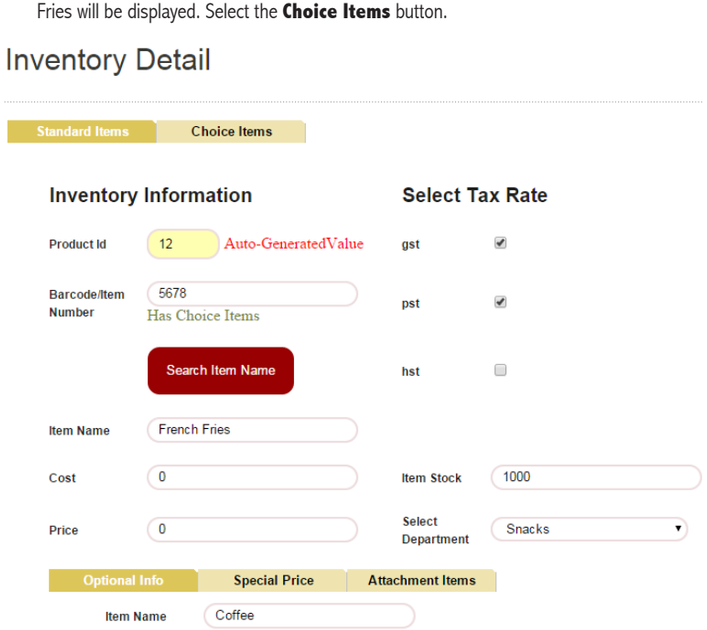


10. In our example, the Small, Medium and Large sized French Fries was created. Press the cancel button. The screen should now show the French Fries main item and 3 sizes created.




| Item No | Item Name | gst | pst | hst | Cost | Price | Stock |
|---|---|---|---|---|---|---|---|
| 5678 | FF - Large | True | False | False | 1.5 | 3.99 | 1000 |
| 5678 | FF -Med... | True | False | False | 1 | 2.99 | 1000 |
| 5678 | FF- Small | True | True | False | 0.5 | 1.99 | 1000 |
| 5678 | French ... | True | True | False | 0 | 0 | 1000 |
| 1 | Non-Tax... | False | False | False | 0 | 0 | 999 |
| 2 | Tax 1 Item | True | False | False | 0 | 0 | 999 |
| 3 | Tax 2 Item | False | True | False | 0 | 0 | 999 |
| 4 | Tax 3 Item | False | False | True | 0 | 0 | 1000 |

11. Select the main item created. In our example – French Fries. The screen detail of French Fries will be displayed. Select the **Choice Items** button.



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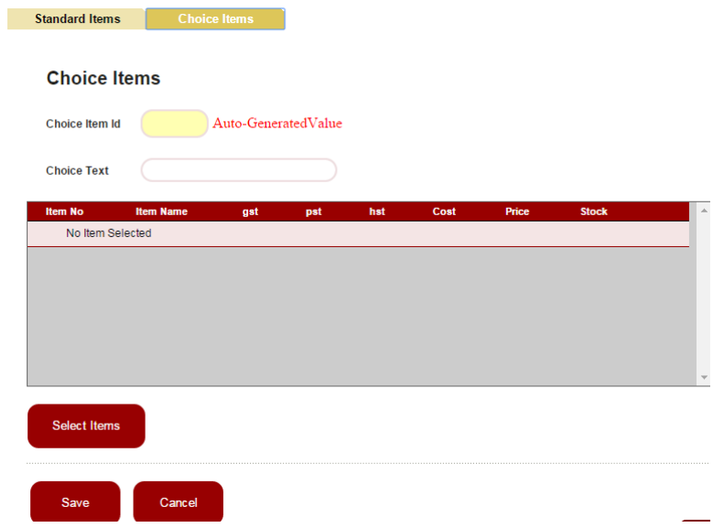
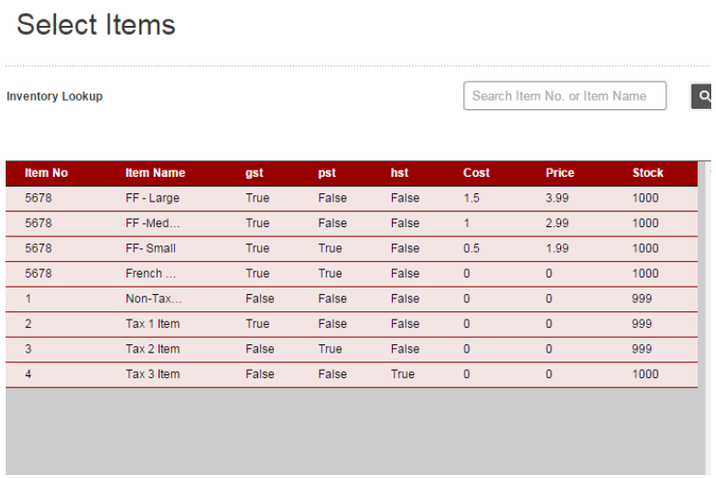
Time: 5 (+) Minutes | Tools: No Tools Required | Difficulty: Easy

12. Click the **Select Items** button.




13. Select the items to be Choice Items. In our example FF- Small, FF- Medium, FF - Large.




| Item No | Item Name | gst | pst | hst | Cost | Price | Stock |
|---|---|---|---|---|---|---|---|
| 5678 | FF - Large | True | False | False | 1.5 | 3.99 | 1000 |
| 5678 | FF -Med... | True | False | False | 1 | 2.99 | 1000 |
| 5678 | FF- Small | True | True | False | 0.5 | 1.99 | 1000 |
| 5678 | French ... | True | True | False | 0 | 0 | 1000 |
| 1 | Non-Tax... | False | False | False | 0 | 0 | 999 |
| 2 | Tax 1 Item | True | False | False | 0 | 0 | 999 |
| 3 | Tax 2 Item | False | True | False | 0 | 0 | 999 |
| 4 | Tax 3 Item | False | False | True | 0 | 0 | 1000 |



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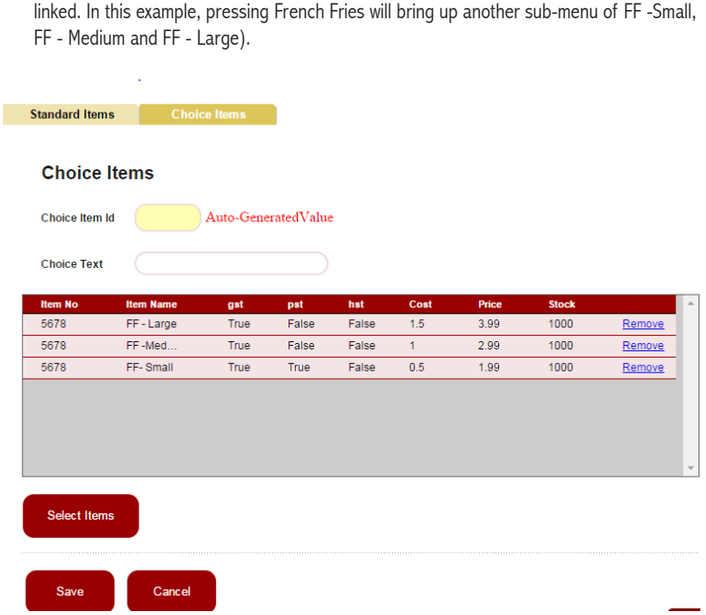
14. Once all items have been selected, press **Save**. The Item and its variables have now been linked. In this example, pressing French Fries will bring up another sub-menu of FF -Small, FF - Medium and FF - Large).




**Congratulations!.**

**You have successfully added a inventory item (s).**

**For more information, please refer to other Quick Reference Guides or for other details refer to: www.royalsovereign.ca**

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