Both   NCR Silver

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Extended Item Setup

Use this Extended Item Setup to enter detailed information about complex items. If you have more basic items, use the Basic Item Setup.

Extended Item Setup includes detailed information about an item and allows you to extend the power of our system. This scree covers all the information necessary to create an item using Extended Item Setup, but we will break up the process into smaller "chunks":

- General Information

- Variations

- Item Modifiers

- Printer Groups
- Bar Codes

- External IDs

- Buying & Selling

- Inventory Tracking

We will use the example of creating a sweater with variations of size, color, and type with a modifier for a monogram. We will let the system automatically generate all the possible combinations for us, and we will use a unique bar code for each combination.

General Information

Let's start with entering general information for the item.

Basic Item Setup   Duplicate

* Indicates required field.

General Information

Category *   SWEATERS

Item Name *   ABC Sweater

Availability   ☑ This item is available at POS

Pricing and Taxes

Sold by *   ● Each   ○ Weight/Measure

Sales Price *   20.00   ☐ Prompt for Price at POS

Tax Category *   General Merchandise

Extended Item Setup   **Extend the power of NCR Silver**
                      Set up Variations and Modifiers, Receiving and Inventory Tracking for this item.

Save   Save and Add Another   Discard Changes   Close

1. Select **INVENTORY > CATEGORIES & ITEMS.**

2. Select the category for the item from the left side of the screen and select **CREATE AN ITEM**.

3. Enter an **Item Name** of up to 20 characters for the item.

4. By default, the checkbox for **This item is available at the POS** is checked for you. This means once you have set up the item, it will be displayed on the POS and available for sale. If you do not want this item to display on the POS, uncheck the box.

5. Select either the **Each** or **Weight/Measure** option to indicate how you want to sell the item. The price for a weighed or measured item is per pound, foot, or whatever the unit of measure may be. Your employees will need to know how items are weighed/measured.

6. Enter the **Sales Price** for the item in xx.xx format.

7. If you want the system to alert the POS user to enter a price for the item at the time of the sale, check the **Prompt for Price at POS** box.

8. Select the **Tax Category** for the item. The system will automatically select your default tax category, but you can click the field and select another tax category for the item.

9. Click **Extended Item Setup**. When the screen refreshes, you will see that information you entered on the **Basic Item Setup** screen is populated on the **Extended Item Setup** screen, and you will see additional fields and selections.

10. Optional: enter a **Description** for the item (up to 30 characters).

Now, let's move on to setting up variations.

Variations
Confused about the difference between variations and modifiers?

Variations are selections the POS user must make to add the item to a ticket. In our example, our sweater will have 3 variations: **Size** (Small, Medium, and Large), **Color** (Blue, Black, and Red), and **Type** (V-neck, Turtleneck, and Cardigan).

To add the first variation

1. Click **Add a Variation**.

2. Select a variation from the list or enter click **Add Custom** to enter your own variation. You can enter up to three variations. When the screen refreshes, you will see a new button to click to enter the values for your first variation.

3. In our example, we will use **Size** as the first variation, so we will click the **Add a Size** button to enter our sweater sizes.

4. The system will display an empty text box, type your first variation detail in the box. In our example, we will enter three values of Small, Medium, and Large.

5. Repeat steps 3 and 4 until you have entered all the values for the first variation.

6. Use the ⬆ ⬇ controls to re-arrange the order of your list of values and use the ⊖ control to delete a value.
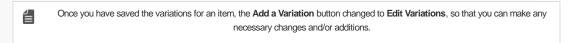
7. To add a second variation, click **Add a Variation** and repeat steps 2 through 6 until you have entered all the values for the second variation; otherwise, skip to step 9. In our example, our second variation will be **Color**.

8. To add a third variation, click **Add a Variation** and repeat steps 2 through 6 until you have entered all the values for the third variation; otherwise, skip to step 9. In our example, our third variation is **Type**.

9. Click **Done**.

> Once you have saved the variations for an item, the **Add a Variation** button changed to **Edit Variations**, so that you can make any necessary changes and/or additions.

Now, let's move on to setting up item modifiers.

Item Modifiers

Modifiers are additional selections (options) the POS user can make to add the item to a ticket. In our example, our sweater will have a modifier for adding a monogram.

1. Click **Assign Item Modifiers**. The system will display the **Item Modifiers** screen. In the example below, we have already set up four modifier groups, including one for **Monogram** with four different options (Single Letter Script, 3 Letter Script, Single Letter Block, and 3 Letter Block). If you haven't set up your modifier groups yet, refer to Creating a Modifier Group.

2. You will want to uncheck any modifier groups that should not be associated with the item. Since Monogram is already selected, click **Done**. This means that anytime this sweater is selected at the POS, the modifier for **Monogram** will be available to the POS user.

Now, let's move on to setting up printer groups. Printer groups are primarily used for food service merchants.

Printer Groups

Printer groups are used to determine where, in addition to the receipt printer, an item will print. They are most often used by businesses that prepare food and send orders to the kitchen. Examples of common printer groups include Kitchen, Bar, and Grill. Using this field, you can select which printer you want each of your items to print to. You can use the default groups, or create your own custom groups. You can also choose to leave the field blank if there are items you do not want to be sent to a printer.

All new items are defaulted to the **Kitchen** printer group. To change this, click the **Printer Group** field and select a different printer group from the list or click **<< Add New >>** and enter a new printer group.

Click the **Printer Group** link to view the **Printer Group Setup** screen. This screen will allow you to add, edit, and delete printer groups.

NOTE: If your business does not use printer groups, you can simply ignore this field. It is not necessary to change the printer group from the default value to blank.

IMPORTANT: In order for your printer routing to work correctly, you must configure each printer group on each POS device. To learn how to complete the printer group set up on the POS, see Configuring Printers.

Now, let's move on to setting up bar codes.

Bar Codes

If we wanted to use a single bar code for all the combinations of our sweater, we would enter it in the **Bar code** field. However, we want to assign a unique bar code to each possible combination. This may sound like a daunting task, but our system does the work for you. To see how this works:

1. Click **Assign Bar Codes**. The system will automatically create the list of all of the possibilities using the variations we entered. All we need to do is assign a bar code to each sweater.

2. Click **Enter a Bar Code** and enter or scan the bar code for each variation of the item.

3. Click **Done**.

External IDs

This field allow users to enter and search for items by External ID.

- If the item does not have any variations, a single field is displayed. You can enter the External ID for the item in the field displayed below:

- If the item has variations, a button is displayed instead of a field.

Once you click on the button, it will open a modal that allows you to enter an External ID for each variation combination.

Now, let's move on to entering the buying and selling information.

Buying & Selling

We are almost done. We need to define how we buy and sell our item. In our example, we set up three variations. Our system allows you to pick one variation that will control the price of the item. In our example, we will use the **Type** variation as our priced variation.

1. Click the **Price and Cost** field and make a selection:

   - Use a single price and cost for all variations

   - Use variation 1 (variation name) for pricing and cost

   - Use variation 2 (variation name) for pricing and cost

   - Use variation 3 (variation name) for pricing and cost

2. When the screen refreshes, you will see a new grid for the variation chosen. Click in the **SALES PRICE** box for the first row and enter the price for that variation.

3. Click in the **UNIT COST** area for the first row and enter the cost for that variation. The system will auto-calculate the **MARGIN** for you.

4. Repeat steps 2 and 3 for each variation (row).

TYPE	SALES PRICE *	UNIT COST	MARGIN
V-neck	20.00	8.00	60.00%
Turtleneck	25.00	10.00	60.00%
Cardigan	35.00	14.00	60.00%

5. Click on the Quantity on Hand button to enter the initial quantity on hand.

NOTE: Items without variations will have a single field instead of a button to enter the quantity.

Once you click on the button, it will open up a modal that allows you enter starting quantities for each variation.

Now, let's move on to the inventory information.

Inventory Tracking

Our system also manages your inventory for you. For more information on inventory tracking, refer to Managing Your Inventory.