Chapter 4

Inventory

FrontDesk v4.1.25

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Revised on: 05/07/2009

Overview

The Front Desk software system can keep track of your entire inventory and related information. There are 4 areas to keeping track of your Inventory; Inventory Categories, Equipment, Inventory Item Information, and Vendor Information. These areas can be accessed by using the Configuration Drop-Down Menu located in both the AAC Check In and Point of Sale Applications, as shown in Figure 4-1. You may also click on the Open Inventory button to access the Inventory Manager. You can see this in Figure 4-2.

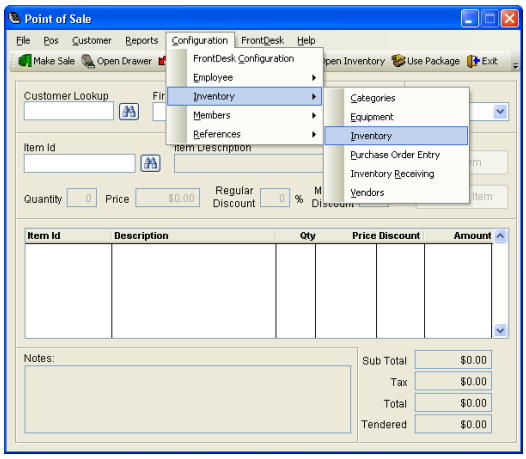

Figure 4-1. From the drop down menu.

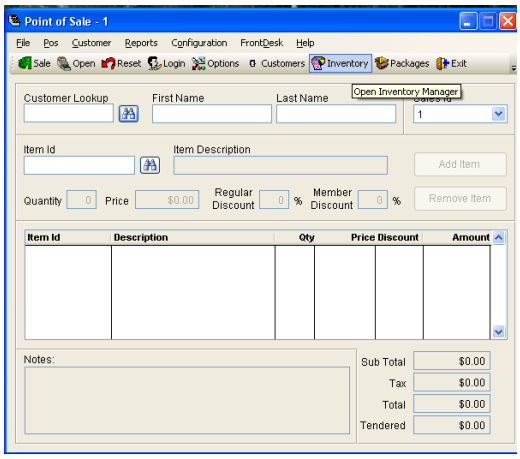

Figure 4-2. From the tool bar.

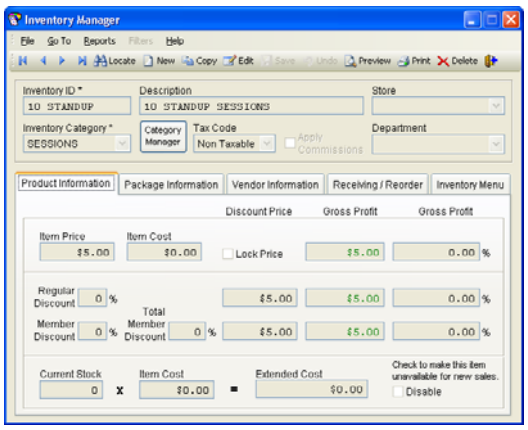

Figure 4-3. Inventory Manager

Inventory Categories

Before entering inventory items into the system, you will need to set up at least one Inventory Category. Each inventory item entered into the software is required to have a category. These categories are used to group your inventory items for reporting purposes.

These inventory items need to be entered into Front Desk (*t-shirts, pullovers, headphones, boxing gloves, water, and Gatorade*). The *t-shirts* and *pullovers* would be grouped under a *clothing* category. The *headphones* and *boxing gloves* would be grouped under an *equipment* category, and *water* and *Gatorade* would be grouped as *beverages* or *consumable items*.

The Category Manager can be accessed by selecting ***Configuration*** ➤ ***Inventory*** ➤ ***Categories***, as in Figure 4-4.

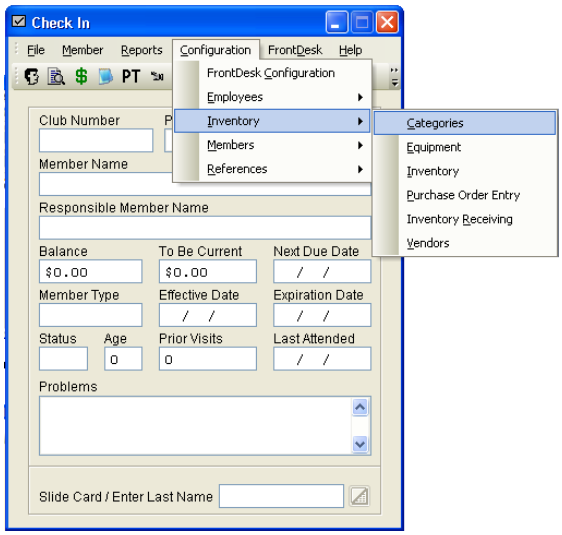

Figure 4-4. Categories from the file menu

The Category Manager may also be accessed by opening the inventory screen, as shown in Figure 4-5 and clicking on the **"Category Manager"** Button.

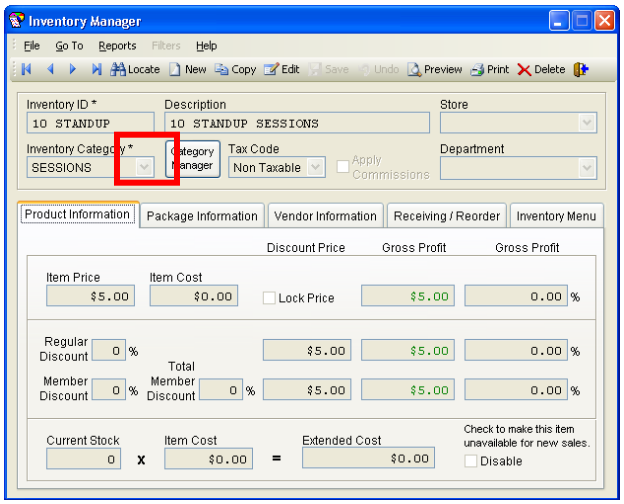

Figure 4-5. Access the Category Manager

To add a new category click the **"New record"** button. Enter the category information, and then click the **"Save"** button. To edit a category click on the **"Edit record"** button. The Category Description is the only information you will be able to edit. Click the **"Save"** button.

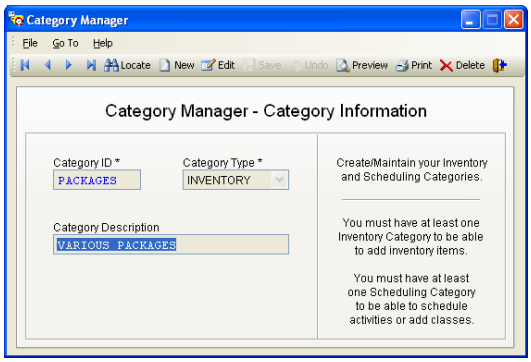

Figure 4-6. Category Manager window

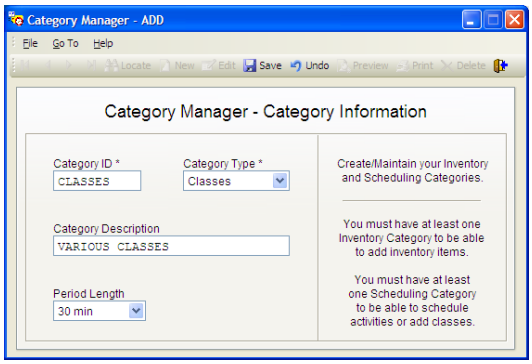

Figure 4-7. Category Manager Add window

- **Category ID:** A unique name for each inventory category. It can be up to 10 characters long and use any combination of numbers, letters and spaces. ** This field is required for each inventory category*. Once you have saved the item, this field cannot be edited. Make sure it is something you and your employees will recognize when adding new inventory items. During the inventory entry process, you will see the category id and description listed together as you choose the category the individual item belongs to.

- **Category Type:** The software makes use of 2 types of categories; INVENTORY and CLASSES. Choose INVENTORY from the drop down list. If you choose the scheduling category type, you will have the option to choose how long the scheduling items will last.

  (Classes categories are described below in the Classes section of the manual.) ** This field is required for each inventory category*.

- **Category Description:** This is a brief explanation of the current category. It can be up to 30 characters long and use any combination of numbers, letters and spaces. Make sure you enter a phrase that will help you better identify the category itself.

- **Period Length:** This is the length of the category item being used.

  Click the **"Save"** button when finished entering all information.

Vendor Manager

The software can keep track of important vendor contact information and notes.

The Vendor Manager can be accessed through the AAC Check In or Point of Sale Applications. Once opened, click on the **Configuration** ➤ **Inventory** ➤ **Vendors**, as shown in Figure 4-8. This is a good way to keep track of your suppliers contact information.

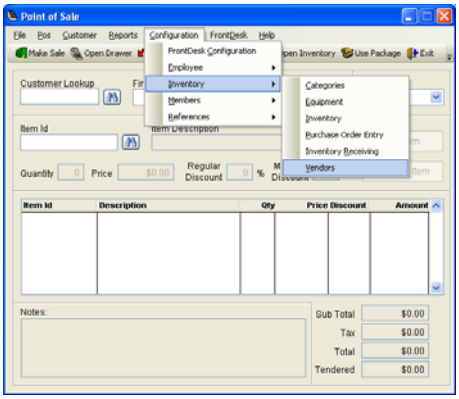

Figure 4-8. Access Vendors from Point of sale file menu

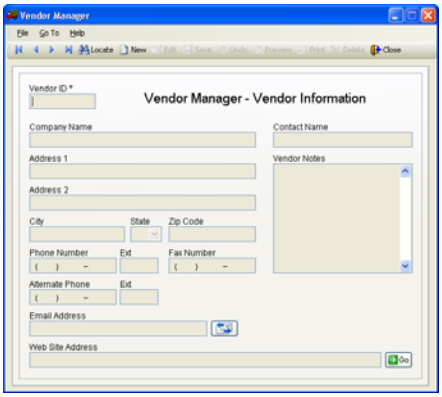

Figure 4-9. Vendor Information window

To add a new vendor click the **"New record"** button. Enter the vendor information, then click the **"Save"** button.

To edit a vendor click on the **"Edit record"** button. You will be able to edit all of the vendor's information except for the Vendor ID. Click the **"Save"** button.

- **Vendor ID:** A unique name for each vendor. It can be up to 10 characters long and use any combination of numbers, letters and spaces. ** This field is required for each vendor.*
- **Company Name:** This is the company name of the vender you are entering.
- **Contact Name:** Name of the vendor's representative that you do business with.
- **Vendor Contact Information:** Enter as much of the Vendor's address and contact information as you wish.
- **Email Address:** Vendor's Email address. Click the **"Send Email"** button to create a new email message using the vendor's email address.
- **Web Site Address:** Vendor's Web site address. Click the **"Go Web"** Go button to go to the vendor's web site through your default internet browser.
- **Vendor Notes:** You may store notes for each vendor in this section. These can be viewed by anyone who has access to the inventory through point of sale or access to the reference file manager.

Click the **"Save"** button when finished entering all information.

Inventory Manager

The Inventory Manager may be accessed by opening either the AAC Check-In Application by clicking on the **Configuration ➤ Inventory ➤ Inventory**, as shown on Figure 4-10. It may also be accessed through the AAC Point of Sale Application by clicking on the **"Open Inventory"** button located at the top of the Point of Sale window, shown in Figure 4-11. The Inventory Manager window can be seen in Figure 4-12. View, edit, and print out inventory item information here.

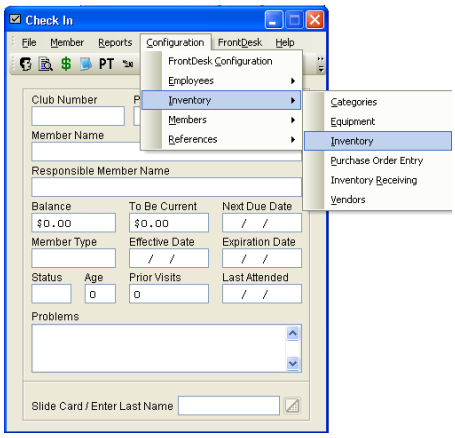

Figure 4-10.

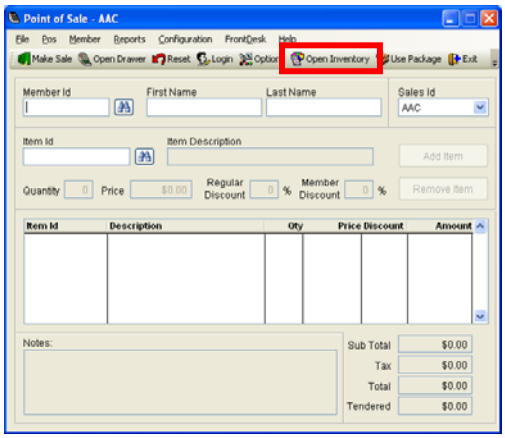

Figure 4-11.

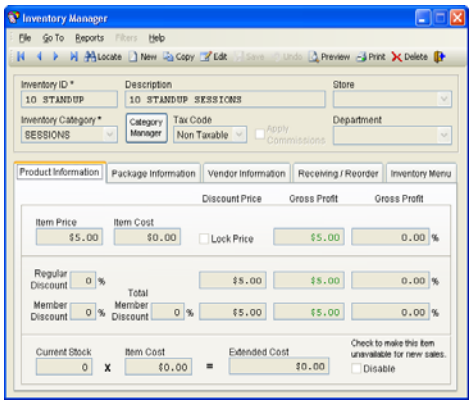

Figure 4-12.

To add a new inventory item click the **"Add new record"** button. Enter the item information, then click the **"Save"** button .

To edit an inventory item click on the **"Edit record"** button. You will be able to edit all of the item's information except for the Inventory ID and Inventory Category. Click the **"Save"** button .

- **Inventory ID:** This is a unique identifier for each inventory item. It can be up to 15 characters long and use any combination of numbers, letters and spaces. If you have a barcode scanner installed, simply scan the item into the field. (*The AAC Label Maker program can easily print out barcode labels for your inventory items that don't have one.*) ** This field is required for each inventory item.* Make sure you make the id something you and your employees will recognize.

- **Description:** A brief explanation of the inventory item. It can be up to 30 characters long and use any combination of numbers, letters and spaces. Use this section to better describe the item for selection during time of sale.

- **Inventory Category:** Select the proper category from the drop down list. If you don't see the category in the list, you can add it by clicking the Category Manager button and follow above directions for adding an inventory category. ** This field is required for each inventory item.*

- **Tax Code:** Select the proper Tax Rate from the drop down list. Tax Rates are entered in the Front Desk Configuration program. For more information, tax codes are described in the Configuration/Setup section above.

  NON TAXABLE - No sales tax will be charged for this item.
  TAX RATE 1 - The amount in the Sales Tax Rate 1 field will be charged for this item.
  TAX RATE 2 - The amount in the Sales Tax Rate 2 field will be charged for this item.

- **Apply Commissions:** Check this box if you want the employee selling this item to receive a commission. Employee commission amounts are entered in the Employee Manager described in the Employee section above.

Product Information Tab

- **Item Price:** Item's retail price.

- **Item Cost:** Item's wholesale price.

- **Regular Discount:** Standard discount percentage.

- **Member Discount:** Discount percentage to apply when selling this item to a member. If there is also a Regular Discount for this item, the 2 Discount percentages will be combined for the Total Member Discount percentage.

- **Discount Price:** Retail price of item after any discounts have been applied.

- **Gross Profit:**

  Dollar Amount $: Retail item price (after any discounts) less the Item Cost.
  Percentage %: Gross Profit dollar amount divided by the Item Cost.

- **Current Stock:** Quantity of the items in stock. This field will need to be updated by you each time you receive a new shipment. The system will deduct from the quantity on hand after each sale.

- **Extended Cost:** Current Stock multiplied by the Item Cost.

- **Disable:** Check the disable box if the inventory item is not available for sale in the AAC Point of Sale Application. This option will allow the item to stay in inventory for your records, but will not show up in the inventory select list when making a sale.

Package Information Tab

- **Item Sold as a Package:** If checked, the other options on this page are then available, and it will treat this inventory item as a package.

- **Track Usage:** Allow point of sale to create a package available record for this item.

- **Members Only:** Check if this package can only be sold to members.

- **Choose Equipment:** By clicking this button, you will be able to set up each individual equipment item and set upgrade fees if they are available.

- **Package Type:** Select the type of package you are creating (normal, tanning, pt, class, daycare, etc).

- **Usage Type:** Method in which the package is being sold. This often pertains to the type of package that is being created. Your choices are Sessions, Minutes, Credits, or Unlimited.

  Example 1: If you are selling personal training sessions as packages, you will want to use personal training and sessions for add-on sessions. This will be for someone who already has a personal training contract and they want to buy more sessions. You will want to use normal and sessions for sessions being sold outside of a contract. This package would be used when you do not have the personal training module. You have the option to sell them the package through point of sale for an extra cost.

  Example 2: If you are selling a tanning package, you will choose tanning as the package type and may use credits, minutes, or unlimited as your usage type.

- **Default Length:** Default number of minutes for this item.

- **Default Quantity:** The default quantity is used to determine how many times the person buying the package will be able to use it. If the package is unlimited, you will want the quantity to be one. If there are a total number of visits allowed, you will want the quantity to be that number of visits and the item price to be per visit.

  Example: You have a tanning facility and want to sell a package for 10 sessions on the standard bed. You charge $40.00 for the total package. In this instance, your default quantity will be 10 and your item price will be $4.00. When the package is sold, the item price will be multiplied by default quantity.

- **Item Expiration:** Choose the time period in which the item expires from the purchase date. This can be days, weeks, months, or years. If the package is being attached through a contract template, you do not need to enter an expiration date. The package will expire when the contract expires.

- **Restrict times for this item:** Check this box to restrict days and times of the week in which the item can be used.

Choose Equipment

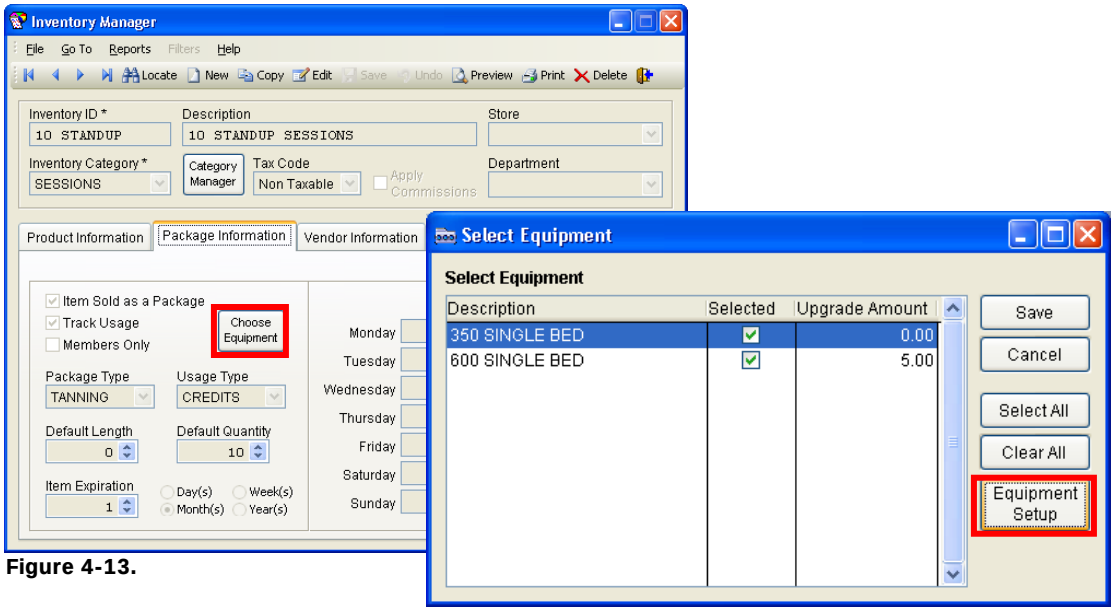

Figure 4-13.

Choose the appropriate equipment from the list for this package, as shown in Figure 4-13. Here the fee may be keyed in for the upgrade.

If you are a tanning facility, make sure all available beds are checked and that an upgrade fee has been entered for beds that are a higher price than the one the package is initially for. Make sure you save after alterations have been made in the equipment screen.

**If you are not able to locate the equipment, select the equipment setup button and the following screen will appear for you to setup the equipment.

Equipment Setup

Equipment Setup can be accessed by opening the AAC Check-In or Point of Sale Applications and clicking on the ***Configuration*** ➤ ***Inventory*** ➤ ***Equipment***.

When setting up your equipment, there are a few things you want to remember. First, you will need to set up equipment types for each type of equipment at the facility. Once you have created your equipment types, then you must create an equipment record for each item you possess. If you have two or three of an item, it must be entered multiple times in the equipment manager window.

You have a tanning location with three types of beds (350, Standup, and 600). You will create an equipment type for each of these and choose a color for each accordingly. Then you will need to make a record for each bed you have and set it to the proper room number. If you have two 350's, one standup, and two 600's, you would create 5 records. This way you can show all beds you currently have and will know which ones are available and which ones are not.

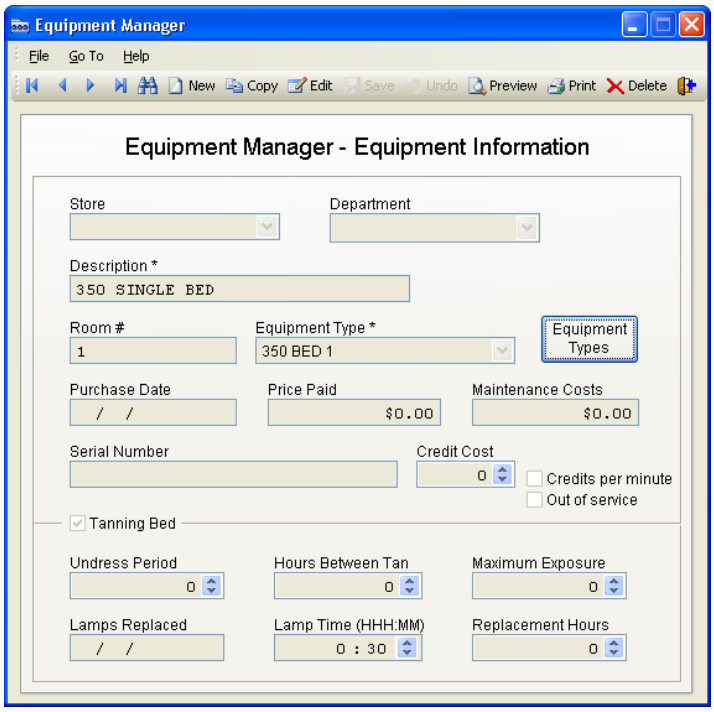

Figure 4-14.

- **Description:** Assign an appropriate description for the equipment.
- **Store:** This will only be available if you have multiple locations that use a remote connection to our servers (AAC Terminal Services). You can display the equipment's location.
- **Room:** Number or name of room where equipment resides. If you are interfacing with timers for tanning beds, enter the room number that corresponds with each bed.
- **Equipment Type:** Select equipment type that will be used from the drop down list. If your equipment is not available, click the equipment type's button to open the setup screen and create your equipment types.
- **Equipment Types:** This button takes you to a setup your equipment types, example to follow.

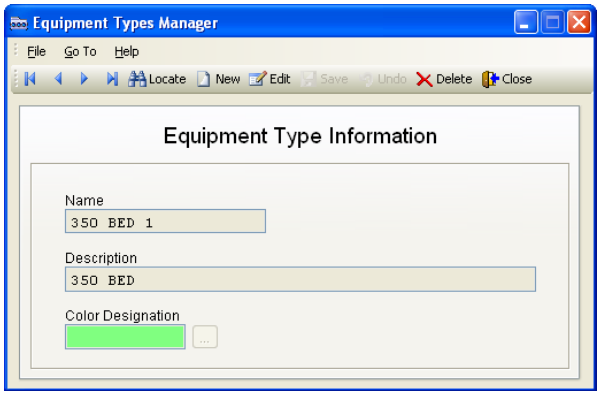

Figure 4-15.

- **Purchase Date:** Date the equipment was purchased, for tracking purposes.
- **Price Paid:** Price paid for equipment.
- **Maintenance Costs:** Any maintenance costs associated with this piece of hardware.
- **Serial Number:** The serial number associated with this equipment.
- **Credit Cost:** Number of credits using this item will deduct from a credits-based package.
- **Tanning Bed:** Check if this is a tanning bed, and the next options become available.
- **Timer Delay:** The undress period before energizing lamps.
- **Hours between Uses:** Minimum # of hours before the same person can use the equipment again.
- **Maximum Time:** Maximum number of minutes the equipment can be used at one time.
- **Lamps replaced:** Date lamps were replaced.
- **Lamp Hours:** Total hours on lamps.
- **Name:** This name is pulled into other screens and is limited to 19 characters.
- **Description:** You are able to enter a longer description here that is used to identify the proper category for each inventory type.
- **Color Designation:** This is another way to categorize your equipment types. This is often used for tanning bed differentiation in tanning salons.

Vendor Information Tab

Vender information is accessible through the Inventory Manager. To open the Inventory Manager, open AAC Check-In and click on the ***Configuration*** ➤ ***Inventory*** ➤ ***Inventory***.

The individual inventory item's vendor information is located on the Vender Information tab located in the Inventory Manager. This may also be accessed by opening the AAC Point of Sale application and clicking on the **"Open Inventory"** button, as shown in Figure 4-16.

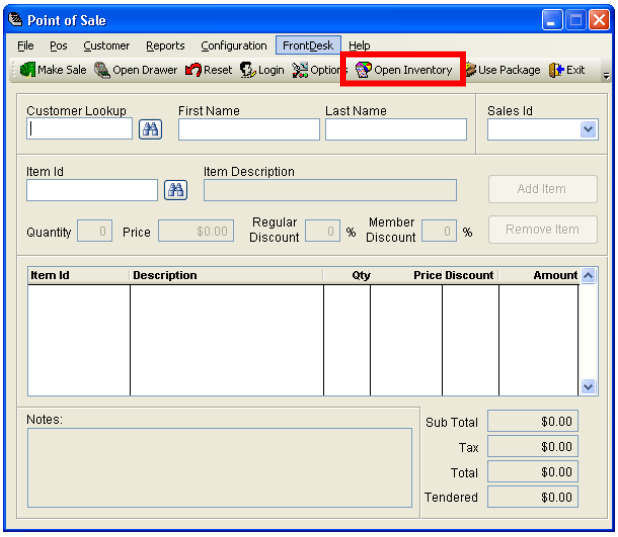

Figure 4-16.

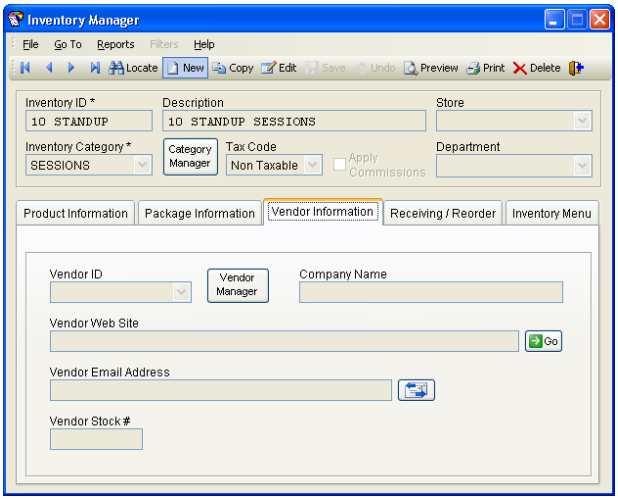

Figure 4-17.

- **Vendor ID:** Select the Vendor for this item from the drop down list. If you don't see the vendor in the list, you can add it by clicking the Vendor Manager button and follow above directions for adding a vendor.

- **Company Name, Vendor Web Site, & Vendor Email Address:** If the information has already been entered in the vendor's record, then it will be displayed when the vendor id is selected.

- **Vendor Stock #:** If the inventory item has a separate stock number from the vendor, enter this here.

Receiving/Reorder Information Tab

Use this tab to enter products received, as well as reorder information. This does not update the quantity on hand, it simply documents receiving the item.

- **Last Received Date:** The date that you last received this item from the vendor.
- **Last Received Quantity:** The amount of items you last received.
- **Reorder At:** Stock level when item will appear on the Reorder Report. The Point of Sale system will warn you when an item has reached this level.
- **Reorder Quantity:** Normal order quantity for this item. This will show up on the Inventory Reorder Report.

Inventory Menu Tab

This screen provides you the ability to setup quick key icons and hot keys for the point of sale application.

- **Assign Icon**: Select the icon you would like to associate with this product. To change the icon, you must first remove the link and then re-attach the new file for the icon.
- **Hot Key to Access Item**: Assign a letter for the alt letter shortcut, this will appear on the icon. You must have an icon assigned to the product to have a hot key assigned.

Click the **"Save"** button when finished entering all information.