



# POSitive Tips

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## Templates Save Time

If you find you are frequently adding the same group of inventory items to an invoice, then a Template could save you time. Common uses for templates are computer systems, aquarium starter sets, living room suites, kits, and a host of other "sets" of inventory.

A Template saves time because...

- It is a listing of several inventory items to be sold as a group, created in advance, and used over and over
- It uses just one SKU to sell all the items eliminating many keystrokes
- It is easy to adjust selling quantities en masse
- It is able to control selling prices, offering discounts and price reductions for buying the whole set

### TIP OF THE MONTH

*"How To Save Time with Templates"*

### 4 VARIATIONS PRODUCE GREAT RESULTS

#### TEMPLATE

A list of several inventory items each selling at its regular price.

#### PACKAGE

A list of inventory items selling at a "Group" price. The customer sees the components of the package, but not individual prices.

#### KIT

A list of inventory items sold invisibly. The customer does not know the contents; just the description and price.

#### ASSEMBLY

A Kit which melds the individual components into one stock item. This does not allow for substitutions.

## TEMPLATE

### One SKU Sells a "Set" of Several Items

This is the easiest setup. Just create a template and add the items to be sold.

The screenshot shows a 'Transaction Window' titled 'Template Editor: 3 PIECE FLORAL LUGGAGE'. The window has a menu bar with '[ESC] Menu' and 'Suspend [Pause]'. Below the menu bar, there are two main sections: a template information box and a pricing section. The template information box shows 'Template: FLORAL3' and 'Desc: 3 PIECE FLORAL LUGGAGE'. The pricing section has radio buttons for 'Retail' (298.3300), 'Discount' (280.0000), and 'Club' (260.0000). A yellow callout bubble points to the 'Retail' option with the text 'Separate Selling Prices'. Below these sections is a table with columns: SKU, Description, Qty, BOrdr, Price, Dsc.%, and Total. The table contains three rows: 'FSTOTE FLORAL SET TOTE' (1.00, 0.00, 65.00, 0.00, 65.00), 'FS21 FLORAL SET 21" CARRY ON' (1.00, 0.00, 100.00, 0.00, 100.00), and 'FS27 FLORAL SET 27" PULLMAN' (1.00, 0.00, 133.33, 0.00, 133.33). Below the table, there is a status bar showing 'Stock: 3.00 | Held: 0.00 | Available: 3.00'. At the bottom of the window, there are several buttons for 'Edit Template Header [F3]', 'Void Transaction [F4]', 'Item Menu [F5]', 'Shortcuts [F6]', 'Adjust Size [F7]', 'Show Costs [F8]', and 'Save [F10]'. On the right side, there is a summary of totals: 'LineTotals: 298.33', 'SubTotal: 298.33', 'Item Count: 3.00', '- Coupon: 0.00', '- Deposit: 0.00', and 'Total: 321.60'. A large green number '298.33' is displayed in the bottom right corner.

SKU	Description	Qty	BOrdr	Price	Dsc.%	Total
FSTOTE	FLORAL SET TOTE	1.00	0.00	65.00	0.00	65.00
FS21	FLORAL SET 21" CARRY ON	1.00	0.00	100.00	0.00	100.00
FS27	FLORAL SET 27" PULLMAN	1.00	0.00	133.33	0.00	133.33

While invoicing, just enter the template SKU, and all the items will be added to the invoice with each item displaying its original selling price.

The final selling price is automatically based upon the customer's price level.

## PACKAGE

### One SKU Sells a "Set" of Several Items at One "Group" Price

After adding items to a template, add a "Package" line at the top of the list and a "Subtotal" line at the end. The advantage here is that the customer sees what the products are, but they do not see the individual selling price of each item

The screenshot shows the 'Transaction Window' for a 'Template Editor: 3 PIECE FLORAL LUGGAGE'. The window includes a menu bar with '[ESC] Menu' and 'Suspend [Pause]'. Below the menu, there's a section for 'Template' with 'SKU: FLORAL3PKG' and 'Desc: 3 PIECE FLORAL LUGGAGE'. To the right, the 'Pricing' section shows 'Price Level Display' with options for 'Retail' (275.0000), 'Discount' (265.0000), and 'Club' (255.0000). The main table lists items: 'PACKAGE' (1.00 Qty, 255.00 Price, 0.00 Dsc.%, 255.00 Total), 'FSTOTE' (1.00 Qty, 0.00 Price, 0.00 Dsc.%, 0.00 Total), 'FS21' (1.00 Qty, 0.00 Price, 0.00 Dsc.%, 0.00 Total), 'FS27' (1.00 Qty, 0.00 Price, 0.00 Dsc.%, 0.00 Total), and 'SUBTOTAL' (1.00 Qty, 255.00 Price, 0.00 Dsc.%, 255.00 Total). A yellow callout bubble points to the 'Price' column with the text 'No Individual Selling Prices'. At the bottom right, a large green '255.00' is displayed. The bottom of the window has a 'Note' field, a 'Locked' checkbox, and a grid of function keys: 'Edit Template Header [F3]', 'Void Transaction [F4]', 'Item Menu [F5]', 'Shortcuts [F6]', 'Adjust Size [F7]', 'Show Costs [F8]', '[F9]', and 'Save [F10]'. On the right side, there are buttons for 'Up', 'Down', 'Add [INS]', and 'Del [DEL]'. Summary statistics show 'Line Totals: 255.00', 'SubTotal: 255.00', 'Item Count: 3.00', '- Coupon: 0.00', '- Deposit: 0.00', and 'Total: 274.89'.

The steps for creating a Template are very simple.

1. At the Inventory List choose ADD and select Template
2. After choosing a Department and Category, enter a SKU, Description and set the options desired.
3. Add the inventory to the Template, set pricing, and save your changes.

PRESS F1 for On-Line HELP

You may choose to sell the "package" to all price levels at the same price or you may assign different prices per price group.

**Include Notes** – Press CTRL-N to add line notes either before or after the package. This note could state your store policy, some special instructions, or the fact that the purchase of the package saves money.

The screenshot shows a software interface for a 'GAME PACKAGE'. The top section has columns for 'SKU> [F5]', 'Description [F6]', 'Retail [F7]', and 'Reg Price'. Below this, there are two rows of items: 'APRILOFFER' (GAME PACKAGE, 49.00 Retail, 49.00 Reg Price) and 'GP1' (GAME PKG - 2 BARIO GAMES, 54.00 Retail, 54.00 Reg Price). Below the list, there's a summary table with columns for 'SKU', 'Description', 'Quantity', 'Price', and 'Total'. The summary shows 'PACKAGE' (1.00 Qty, 49.00 Price, 0.00 Total), 'SNA1' (1.00 Qty, 0.00 Price, 0.00 Total), 'SN1' (1.00 Qty, 0.00 Price, 0.00 Total), and 'SUBTOTAL' (1.00 Qty, 49.00 Price, 0.00 Total). A note is visible: 'This Package Deal saves you 33% off Retail'. The interface includes buttons for 'Select', 'Buy Now [F4]', 'UDE', 'Copy', 'Add', 'Edit', and 'Delete'. At the bottom, there are tabs for 'Notes', 'General', 'Pricing', 'Stock', 'Vendors', 'Links', 'Promos', and 'Price Breaks'.

Discounting prices can be done in multiple ways.

1. CTRL-D for discounting by dollar off or percentage
2. Package Price for each price level
3. Kit and eCommerce manual adjustment of prices.

PRESS F1 for On-Line HELP

## KIT

### One SKU Sells a "Hidden Set" of Several Items

This is referred to as a Kit. With a simple switch in the settings for the template you can choose to not itemize the contents. The invoice will only display the Description and Price. This is especially useful if you are creating a whole new product using various materials in raw form.

The screenshot shows the 'Template Form' dialog box. The 'SKU' field contains 'FLORAL3PKG'. The 'Description' and 'Long Description' fields both contain '3 PIECE FLORAL LUGGAGE'. The 'Weight' field is set to '0.0000'. The 'Recalc [F3]' button is visible. The 'Post To Internet' and 'Allow Discounts' checkboxes are unchecked. The 'Hide Template Items [Kit]' checkbox is checked and circled in red. The 'Assembly Options' section has 'This Item will be Assembled' and 'Track Serial Number when Assembling' unchecked. The 'Label Desc' field is empty. The 'Department' and 'Category' are both set to 'Luggage'. The 'Change Category' button is visible. The 'OK [F10]' and 'Cancel' buttons are at the bottom right.

## ASSEMBLY

### For more advanced inventory control

Assembly Options allows you to reserve stock components for use in kits and permits the remaining components to be sold separately.

The screenshot shows the 'Kit Assembly' dialog box. It has two tabs: 'Create Kits [F2]' and 'Assembled Kits [F3]'. The 'Create Kits [F2]' tab is active. The 'Kit Components' table is shown below:

SKU	Description	Quantity	Cost	Available
T1001	TOWEL - BATH	1.00	4.00	2.00
T1002	TOWEL - HAND	1.00	3.00	2.00
T1003	TOWEL - WASH CLOTH	1.00	1.00	2.00
T1004	TOWEL - BEACH	1.00	10.00	2.00

At the bottom of the dialog, there is a summary section: 'Total Components: 4', 'Total Cost: 18.00', 'You have enough parts to assemble: 2', and 'How many Kits to assemble?' with a spinner set to '2'. There is an 'Assemble Kits [F5]' button and a 'Close' button.

### Additional Ideas

Serial numbers can be assigned to Assembled Kits.

Special Labels can be designed and printed for any of the four types of templates.

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