

Inventory Notes

Have you ever wished that you could automatically deliver messages to clerks at Point of Sale when certain items are sold?

Or perhaps print a reminder or note to customers on their invoice when they purchase certain items, such as a reminder that a restocking fee will be charged if the item is returned?

If so, this inventory notes lesson will be of interest to you. In this lesson, you will learn how to create messages that can display at Point of Sale, print on receipts or invoices, or appear as a reference for inventory managers. Once you know how to create the notes, you'll see how they work at Point of Sale.

Topics

- Create Notes
- Notes at POS

Create Notes

Let's start by going into the inventory menu and selecting inventory maintenance, or type IMU in the launch bar.

The Notes tab is what we will use to add, modify, or delete Item Notes.

The first thing you will notice is the Decisions Section. Under the decisions section you will see the following fields: Note Group and Type of Notes.

The Note Group is a unique identifier for the note you are adding. It is a required field and it is a 14-character alpha numeric field. A note in itself can be item specific; meaning that the note will only apply to a specific item, or group specific; meaning that the note can apply to multiple items.

By default, the note group is set to the SKU being displayed; however, you can change it to whatever you wish the unique identifier to be.

Right under the Note Group – we have the Type of Note field. The dropdown contains 5 different note types, which you can select depending on the type of behavior you want the note to trigger.

Type 1 notes are printed on receipts or invoices at the POS.

Type 2 messages display on the POS screen for your clerks or salespeople to either notify them of something, or prompt them to notify the customer.

Type 3 messages appear only in inventory maintenance and are used for reference.

If you want to add multiple key words to an item to help with searchability, you can add those key words under note type 3.

A good example is drywall. As you know, people use various different words to refer to drywall – wallboard, plasterboard, gypsum, just to mention a few. Obviously, you would like your cashiers to be able to find your drywall items when they type wallboard during a search. Note type 3 facilitates just this.

Keep in mind that the Build Description Indexes report must run to make these additional words searchable. This report should be placed in your EOD queues to make sure it creates indexes for each of the types of notes added to the inventory file.

Type 4 messages combine types 1 and 2; in other words, the message is both printed on the receipt and displayed at the terminal.

Finally, Type 8 indicates that this message contains additional information to be displayed in the INET catalog.

Select the type of behavior you want to have with this note by choosing a note type.

If the note type selected is either 1, 2, or 4 then the POS section is applicable. For note types 3 and 8, this section is irrelevant.

The first flag indicates whether you want to display repeated notes at POS, while the second can manage the behavior of repeated notes that print on invoices or receipts.

Now, we are ready to enter our desired message on the Note screen.

It is a free text box and to navigate to the next line you must hit CNTRL and Enter.

Once you have typed your message, click add to add the note. If you wish to modify an existing note, you can display it in the notes tab, make the necessary changes, and click Change.

Finally, if you want to delete a note, display it on the Notes tab, and click the Delete button.

You will be prompted to make sure that you really intend to delete the note.

Answer Yes to the prompt, and the note will be deleted.

Remember we mentioned earlier that a note can be applied to a group of items?

In this scenario, instead of adding the note to every item, you can just add the Note Group identifier in the Description group field in the Codes tab of the items in question and click the Change button.

A good scenario could be when you want to add a note to the receipt to the class of drain cleaners. Since these items are hazardous, you may want to warn the consumer of the risks involved when using these items. Applying the note group to this set of items, will not only save you time, but it will also offer greater consistency.

Keep in mind that you can only apply multiple note types under the same note group. So, you can have a message for the POS, as well as add additional search words under note type 3.

When you navigate to the different note types, you will be able to see the different messaging.

If someone purchases 2 different types of drain cleaners at POS, and both items have the same note group, then if you select Y for either of these flags, then the note will print or display twice; however, if you had selected N, then the note will only appear or print the first time a noted item is posted to the transaction; if other items with the same note are posted to the same transaction, then the note will be omitted.

Notes at POS

Now, let's take a quick look at the POS and how the Item Notes behave in this environment.

At point-of-sale, when the item with a Display-type note is scanned, the system displays the message for the clerk.

The cashier simply presses Enter to select okay.

Then, if the note is coded as a Print-type note, the item is posted, and the message is printed below it.

If repeats are set to Yes, the next time a like item is sold, the note is once again displayed and/or printed on the invoice.

Here we have come to the end of this class. As you have seen it is pretty easy to set up Inventory Notes in Eagle. Since you can't be at the register every time an item is sold, these notes can provide helpful information when they are most needed.

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