

Inventory Manual

sZen Corp

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1 Setting up Inventory

Inventory is managed in the sZen Inventory Module. To access the Inventory Module:

-SELECT the 'INV' button on the left side of the main screen

-OR-

-SELECT File | Inventory

-This opens the following screen

Department	SKU	Item	Qty	Price
Accessories	20323	Aldes Nevada Capri		\$75.00
Account Payments	50463	Callaway Pants Ladies	2	\$78.00
Bags	60310	Pinstripe Cropped Pant	2	\$62.00
Beer	30450	Sport Holey	0	\$70.00
Beverages	30464	Tail Pants Ladies	0	\$78.00
Cart Fees	60403	Titania blue capri	2	\$65.00

This is the Inventory Module. Here is where Departments, Brands, Vendors, Inventory Items, and other inventory related things are managed.

1.1 Departments

All inventory will be organized into departments. These departments can be set up in whatever manner seems best to keep inventory organized efficiently.

[The Department Manager Screen](#)

[Creating a New Department](#)

[Editing a Department](#)

[Deleting a Department](#)

[Inactivating a Department](#)

The Department Manager Screen

To begin creating a new department:

-**SELECT** the 'Depts' button



-This opens the Department Manager Screen

Department	Dept #	HQ	Disc %	Income or Liability Acct	Inventory Asset Acct	Expense Acct
Accessories	317	N		Golf Retail Sales	COGS - Golf Retail	Retail Inventory - Golf Inventory
Bags	313	N		Golf Retail Sales	COGS - Golf Retail	Retail Inventory - Golf Inventory
Beer	315	Y		Proshop - Beer		
Beverages	314	Y		Proshop - F&B		
Cart Fees	303	Y		Golf Cart Rental		
Club Storage	450	Y		Bag Room Rental		
Clubs	307	N		Golf Retail Sales	COGS - Golf Retail	Retail Inventory - Golf Inventory
Driving Range	302	Y		Driving Range		
Event Prizes	399	Y		Golf Retail Sales		
Event Pymt/Dep	3	Y		Event/Banquet Deposits		
Fitness Equipment	1000	N		Golf Retail Sales	COGS - Golf Retail	Retail Inventory - Golf Inventory
Food	446	Y		Proshop - F&B		
Footwear	301	N		Golf Retail Sales	COGS - Golf Retail	Retail Inventory - Golf Inventory
Gloves	308	N		Golf Retail Sales	COGS - Golf Retail	Retail Inventory - Golf Inventory
Golf Balls	300	N		Golf Retail Sales	COGS - Golf Retail	Retail Inventory - Golf Inventory
Green Fees	304	Y		Green Fees		
Headwear	306	N		Golf Retail Sales	COGS - Golf Retail	Retail Inventory - Golf Inventory
IGA HNDPC	358	Y		IGA HNDPC		
Lessons	305	Y		Services - Golf Lessons		
Men's Shorts	322	N		Golf Retail Sales	COGS - Golf Retail	Retail Inventory - Golf Inventory
Old Inventory	318	N		Golf Retail Sales	COGS - Golf Retail	Retail Inventory - Golf Inventory
Outerwear Ladies	310	N		Golf Retail Sales	COGS - Golf Retail	Retail Inventory - Golf Inventory
Outerwear Mens	309	N		Golf Retail Sales	COGS - Golf Retail	Retail Inventory - Golf Inventory
Pants Ladies	319	N		Golf Retail Sales	COGS - Golf Retail	Retail Inventory - Golf Inventory
Rentals	350	Y		Golf Equipment Rental		
Season Passes	316	Y		Deposits/Deferred Income Golf Pass		

Creating a New Department

Continue creating the new department:

-**SELECT** the 'New' button



-This activates the text fields above the grid

-**ENTER** the appropriate information (Dept Name, GL account association, ect.)*

-**SELECT** the green 'Check Mark' button

The new department created and will appear in the grid, and also on the main Inventory Module Screen.

NOTE The HG field means "Has no Hard Goods". Placing a 'Y' in this field means that the department being created has no hard goods. This flag is useful for departments that contain inventory items that are services (lessons, guided tours, etc.) rather than physical items. All items created into a department flagged has not having hard goods will automatically be created as Non-Depletable items.

Editing a Department

To edit an existing department:

- HIGHLIGHT** the desired department
- SELECT** the 'Edit' button



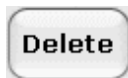
- This activates the text fields above the grid with the highlighted department's information entered into them.
- Make the desired changes
- SELECT** the green 'Check Mark' button

The changes will be saved and applied to the highlighted department.

Deleting a Department

Deleting a department only works for departments that have no inventory items active or inactive. To delete a department with these qualifications:

- HIGHLIGHT** the desired department
- SELECT** the 'Delete' button



The highlighted department will be removed from the grid, and it will never be seen again.

Inactivating a Department

Departments that have inventory items and history tied to them and cannot be deleted, but are no longer in use, may be inactivated. However, all inventory items that they contain must be inactivated prior to the department being inactivated. To inactivate a department:

- Make sure that all inventory items tied to the the department are inactivated
- HIGHLIGHT** the desired department
- SELECT** the 'Inactivate' button



The highlighted department will be inactivated, and will no longer appear in the grid. It can still be reactivated if it needs to be.

1.2 Brands

[The Brand Manager Screen](#)

[Creating a New Brand](#)

[Editing a Brand](#)

[Deleting a Brand](#)

[Inactivating a Brand](#)

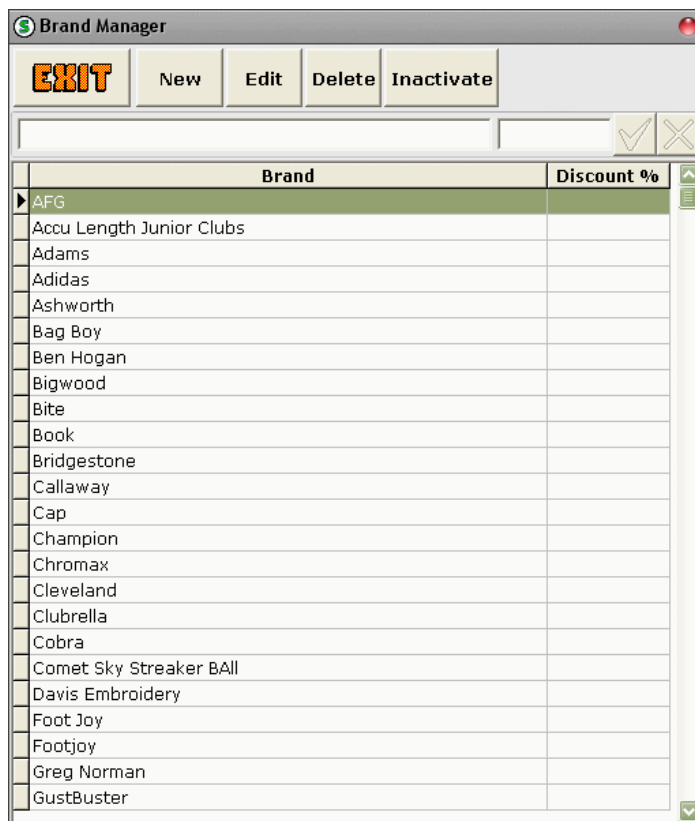
The Brand Manager Screen

Brands are managed from the Brand Manager Screen. To get to this screen:

-SELECT the 'Brands' button



-This opens the Brand Manager Screen



Creating a New Brand

To create a new brand:

-SELECT the 'New' button

A rectangular button with a light beige background and a thin black border. The word "New" is centered in a bold, black, sans-serif font.

- This activates the text fields above the grid
- ENTER** the appropriate information (The brand name, and the discount % if applicable)
- SELECT** the green 'Check Mark' button

The new brand will be created and added to the grid.

Editing a Brand

To edit an existing brand:

- HIGHLIGHT** the desired brand
- SELECT** the 'Edit' button

A rectangular button with a light beige background and a thin black border. The word "Edit" is centered in a bold, black, sans-serif font.

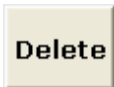
- This activates the text fields above the grid with the highlighted brand's information in them
- Make the desired changes
- SELECT** the green 'Check Mark' button

The changes will be saved and applied to the highlighted brand.

Deleting a Brand

Only brands that have no history behind them can be deleted. To delete such a brand:

- HIGHLIGHT** the desired brand
- SELECT** the 'Delete' button

A rectangular button with a light beige background and a thin black border. The word "Delete" is centered in a bold, black, sans-serif font.

- A confirmation screen will appear



- SELECT** the 'Yes' button

The highlighted brand will be deleted.

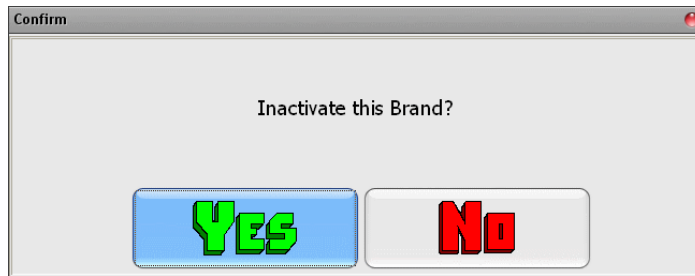
Inactivating a Brand

Inactivating a brand is done when it has history tied to it and cannot be deleted. To inactivate a brand:

- HIGHLIGHT** the desired brand
- SELECT** the 'Inactivate' button



- A confirmation screen will appear



The highlighted brand will be inactivated. It can be reactivated from the Administrator.

1.3 Vendors

[The Vendor Manager Screen](#)

[Creating a New Vendor](#)

[Viewing the Details of a Vendor](#)

[Editing a Vendor](#)

[Deleting a Vendor](#)

[Inactivating a Vendor](#)

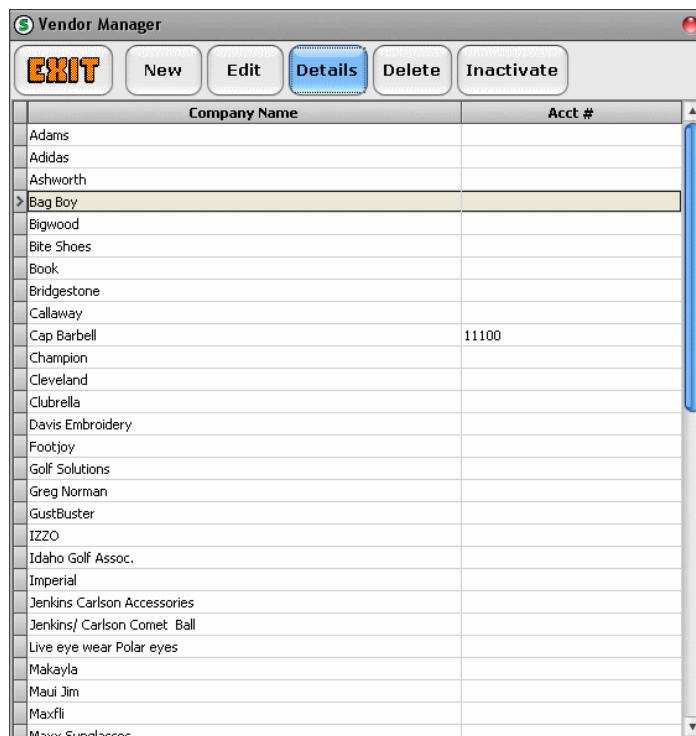
The Vendor Manager Screen

Vendors are managed in the Vendor Manager Screen. To get to this screen:

-SELECT the 'Vendors' button



-This opens the Brand Manager Screen



Creating a New Vendor

To create a new vendor:

-SELECT the 'New' button



-This opens the Edit Vendor Screen




- ENTER the appropriate information
- SELECT the 'Save' button

The Edit Vendor Screen will close and the new vendor will be added to the grid.

Viewing the Details of a Vendor

All the details of a vendor, such as their contact information, etc., are not visible in the Vendor Manager Screen. To view all the details of a particular vendor:

- HIGHLIGHT the desired vendor
- SELECT the 'Details' button



-This opens the Edit Vendor Screen, and all the vendor's information will be visible.

Editing a Vendor

To edit a vendor:

- HIGHLIGHT the desired Vendor
- SELECT the 'Edit' Button



- This opens the Edit Vendor Screen with the highlighted vendor's information already displayed in it
- Make the desired changes
- SELECT the 'Save' button

The changes will be saved and applied to the highlighted vendor.

Deleting a Vendor

Only vendors that have no history behind them can be deleted. To delete such a vendor:

- HIGHLIGHT** the desired vendor
- SELECT** the 'Delete' button



- A confirmation screen will appear



- SELECT** the 'Yes' button

The highlighted vendor will be deleted.

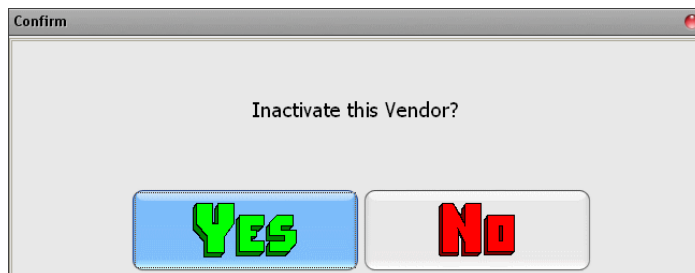
Inactivating a Vendor

Inactivating a vendor is done when it has history tied to it and cannot be deleted. To inactivate a vendor:

- HIGHLIGHT** the desired vendor
- SELECT** the 'Inactivate' button



- A confirmation screen will appear



The highlighted vendor will be inactivated. It can be reactivated from the Administrator.

1.4 Inventory Items

[Creating a New Inventory Item](#)

[Editing an Inventory Item](#)

[Inactivating an Inventory Item](#)

[Disallowing Discounts for an Inventory Item](#)

[Making an Item Depletable or Non-Depletable](#)

[Adding Multiple SKUs to an Inventory Item](#)

Creating a New Inventory Item

To create a new inventory item:

-**SELECT** the 'New' button



-This opens the New Inventory Item Screen

The screenshot shows the 'New Inventory Item' form with the following fields and options:

- SKU:** 71528
- Date Created:** Aug 31, 2009
- Qty in Stock:** 0
- Receipt Title:** (empty)
- Full Description:** (empty)
- Department:** (dropdown menu)
- Sub Dept:** (dropdown menu)
- Category:** (dropdown menu)
- Proline:** (dropdown menu)
- Sub Category:** (dropdown menu)
- SMU:** (dropdown menu)
- Class:** (dropdown menu)
- Brand:** (dropdown menu)
- Vendor/Catalog ID:** (empty)
- Tax Rate:** (dropdown menu)
- Retail Price:** \$0.00
- Reorder Qty:** (empty)
- Max Qty:** (empty)
- Weighted Avg:** (empty)
- Most Recent Cost:** (empty)
- Current Margin:** (empty)
- Spiff:** (empty)
- Spiff %:** (empty)
- Cutoff:** (empty)
- Sale Price 1:** (empty)
- Start Date:** (empty)
- End Date:** (empty)
- Sale Price 2:** (empty)
- Start Date:** (empty)
- End Date:** (empty)
- Qty Discount 1 Threshold:** (empty)
- Qty Disc. 1 Price:** (empty)
- Qty Discount 2 Threshold:** (empty)
- Qty Disc. 2 Price:** (empty)
- Timed Price:** (empty)
- Start Time:** (empty)
- End Time:** (empty)
- Checkboxes:**
 - No Discounts
 - Expose Online
 - Disc. Floor
 - Chef (Hot) Flag
 - Depletable Item
 - Chef (Cold) Flag
 - Allow True Zero Price
 - Bar flag
- Sales History:** Last 30, Last 90, Last Yr., Forever
- Order Status:** Qty (empty)
- Buttons:** SAVE (green), DISCARD (orange)

-**ENTER** the appropriate information. Required information includes Receipt Title, Department, Brand, Tax Rate,

and Retail Price. The Retail Price can be \$0.00, but it cannot be empty

-**SELECT** the 'Save' button

The new inventory item will be created.

Editing an Inventory Item

To edit an existing inventory item:

-**HIGHLIGHT** the department that contains the inventory item

-**HIGHLIGHT** the desired inventory item

-**SELECT** the 'Edit' button

A rectangular button with rounded corners and a light gray background, containing the word "Edit" in a bold, black, sans-serif font.


- This opens the Editing Item Screen. This screen looks exactly the same as the New Inventory Item Screen,
- with the highlighted items properties displayed in it.
- Make the desired changes
- SELECT** the 'Save' button

The changes will be made to the highlighted inventory item.

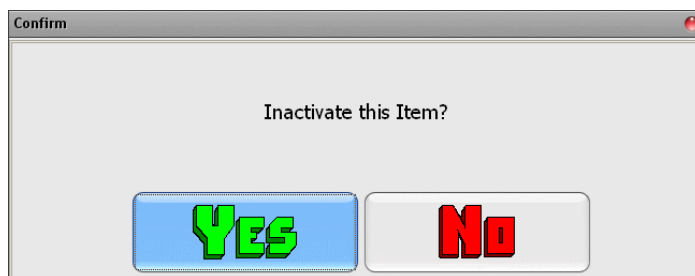
Inactivating an Inventory Item

To inactivate an item that is no longer sold:

- HIGHLIGHT** the department containing the inventory item
- HIGHLIGHT** the desired inventory item
- SELECT** the 'Inactive' button

A rectangular button with rounded corners and a light gray background, containing the word "Inactive" in a bold, black, sans-serif font.

- A confirmation screen will appear



- SELECT** the 'Yes' button

The highlighted item will be inactivated, and will no longer appear in the inventory module.

Disallowing Discounts for an Inventory Item

If it is desired to not allow a particular item to be discounted, there is a flag in the New Inventory/ Editing Item Screen. All that is required to not allow discounts for that item is to:

- HIGHLIGHT** the department containing the inventory item
- HIGHLIGHT** the desired inventory item
- SELECT** the 'Edit' button

A rectangular button with rounded corners and a light gray background, containing the word "Edit" in a bold, black, sans-serif font.

- This will open the Editing Item Screen
- On the right side of the screen in the pink section there are the words 'No Discounts'
- Place a check mark in the box next to those words.

-**SELECT** the 'Save' button

The changes will be applied to the highlighted item, and it will no longer accept discounts in the Retail Screen.

Making an Item Depletable or Non-Depletable

An inventory item that is depletable will reduce its quantity when it is sold. An inventory item that is non-depletable will have a quantity of zero and will not reduce when it is sold. To make an item depletable:

- HIGHLIGHT** the department containing the inventory item
- HIGHLIGHT** the desired inventory item
- SELECT** the 'Edit' button



- This will open the Editing Item Screen
- On the right side of the screen in the pink section are the words 'Depletable Item'
- Place a check mark in the box next to those words
- SELECT** the 'Save' button

The changes will be applied to the highlighted item, and it will begin depleting its quantity when sold.

To make an item non-depletable:

- Repeat the above steps
- Make sure there is no check mark in the box next to the words 'Depletable Item'
- If there is a check mark in the box, remove it
- SELECT** the 'Save' button

The changes will be applied to the highlighted item, and it will not deplete its quantity when sold.

Adding Multiple SKUs to an Inventory Item

Sometimes there is a need to have one inventory item have multiple SKUs. The cause for this often times is because the vendor changes the SKU for their own purposes. Multiple SKUs can be added, edited, and deleted for inventory items in sZen.

Adding another SKU

To add an additional SKU to an item:

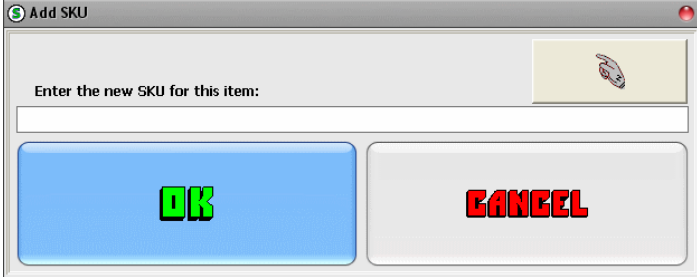
- HIGHLIGHT** the department containing the item
- HIGHLIGHT** the desired inventory item
- SELECT** the 'Edit' button



- This opens the Editing Item Screen
- At the top left of the screen there are several options for the SKU
- SELECT** the 'Add SKU' button



-This opens the Add SKU Screen



- ENTER** the SKU
- SELECT** the 'Ok' button

The new SKU will be added to the inventory item.

Editing a SKU

To edit an existing SKU:

- Follow the above steps
- HIGHLIGHT** the desired SKU
- SELECT** the 'Edit SKU' button



-This opens the Edit SKU Screen with the highlighted SKU entered into it



- Make the desired changes
- SELECT** the 'Ok' button

The edited SKU will be saved.

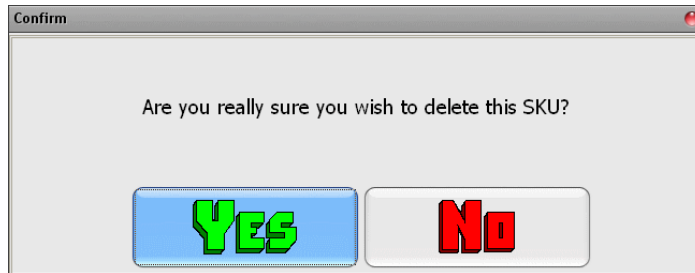
Deleting a SKU

Deleting a SKU can only be done for SKUs that have no history behind them. To delete a SKU:

- Follow the above steps
- HIGHLIGHT** the desired SKU
- SELECT** the 'Delete SKU' button

Delete SKU

-This opens a confirmation screen



-**SELECT** the 'Yes' button

The highlighted SKU will be deleted.

1.5 Sale Prices

There are several ways to create a sale price for an inventory item. A sale price can be defined by a date range, by a certain time of the day, or when the quantity of the inventory item reaches a certain level.

[The New Inventory Item/Editing Item Screen](#)

[Creating a Sale Price By a Date Range](#)

[Creating a Sale Price By a Quantity Threshold](#)

[Creating a Sale Price By a Time Range](#)

The New Inventory Item/Editing Item Screen

All methods for creating sale prices for an item are found in the New Inventory Item/Editing Item Screen. There are two ways to get to this screen:

1.
 - SELECT** the 'New' button
 - This opens the New Inventory Item Screen

This method is used when a sale price is being added to an item at the same time the item is being created.

2.
 - HIGHLIGHT** the department containing the inventory item
 - HIGHLIGHT** the desired inventory item
 - SELECT** the 'Edit' button
 - This opens the Editing Item Screen

This method is used when the item it is desired to add a sale price to has already been created.

Once the New Inventory Item/Editing Item Screen has opened, look for the sale section in the upper right of the screen. It will look like this:

Sale Price 1	Start Date	<input type="text"/>
<input type="text"/>	End Date	<input type="text"/>
Sale Price 2	Start Date	<input type="text"/>
<input type="text"/>	End Date	<input type="text"/>
Qty Discount 1 Threshold	Qty Disc. 1 Price	<input type="text"/>
<input type="text"/>	<input type="text"/>	
Qty Discount 2 Threshold	Qty Disc. 2 Price	<input type="text"/>
<input type="text"/>	<input type="text"/>	
Timed Price	Start Time	<input type="text"/>
<input type="text"/>	End Time	<input type="text"/>

Creating a Sale Price By a Date Range

It is possible to create two separate sale prices that are defined by a date range. Notice from the above image that all it takes to create a sale price by a date range is to:

- ENTER** the desired sale price in the text field under the words 'Sale Price 1 (or 2)'
- ENTER** the desired date range in the 'Start Date' and 'End Date' text fields
- SELECT** the 'Save' button

The new sale price will be saved and applied to the item. It will be in effect between the date range defined for it.

Creating a Sale Price By a Quantity Threshold

It is possible to create two separate sale prices that are based on the quantity in stock of an item. To do this:

- ENTER** the desired quantity level in the text field under the words 'Qty Discount 1 (or 2) Threshold'
- ENTER** the desired sale price in the text field under the words 'Qty Disc. 1 (or 2) price'
- SELECT** the 'Save' button

The new sale price will be saved and applied to the item. It will take effect once the quantity in stock of that item reaches the defined level.

Creating a Sale Price By a Time Range

It is only possible to define one sale price by a time range. To do this:

- ENTER** the desired sale price in the text field under the words 'Timed Price'
- ENTER** the desired time range in the 'Start Time' and 'End Time' text fields
- SELECT** the 'Save' button

The new sale price will be saved and applied to the item. It will be in effect between the time range defined for it.

1.6 Receiving Inventory in the Inventor Module

This method of receiving, that is receiving inventory directly in the Inventory Module, is used only if it is not desired to use Purchase Orders. Purchase Orders are covered in the next chapter of this manual.

[Receiving a New Inventory Item](#)

[Receiving for an Existing Item](#)

Receiving a New Inventory Item

Receiving a new inventory means that it is desired to create a new inventory item, and receive quantity for it at the same time. To do this:

-**SELECT** the 'Receive New' button



-This opens the New Inventory Item Screen

-Notice the slight difference with this version of the New Inventory Item Screen, highlighted in red, is the

section for entering in some receiving information in the lower left of the screen

-**ENTER** in the appropriate information for the new inventory item

-**ENTER** in the appropriate receiving information (vendor, qty received, etc.)

-**SELECT** the 'Save' button

The new inventory item will be created, and will be saved with the receiving information applied to it.

Receiving for an Existing Item

Receiving can also be done for inventory items that already exist in the system. To do this:

-**HIGHLIGHT** the department containing the inventory item

-**HIGHLIGHT** the desired inventory item

-**SELECT** the 'Receive Existing' button

Receive Existing

- This opens the Editing Item Screen with the same difference as the New Inventory Item Screen
- ENTER** the appropriate receiving information
- SELECT** the 'Save' button

The receiving information will be applied to the highlighted inventory item.

1.7 Barcodes

[Printing Regular Barcodes for One Inventory Item](#)

[Printing Barcodes for Multiple Items](#)

[Printing High Speed Barcodes](#)

Printing Regular Barcodes for One Inventory Item

Regular barcodes in sZen print onto Avery 6150 labels. To print regular barcodes for an inventory item:

- HIGHLIGHT** the department containing the inventory item
- HIGHLIGHT** the desired inventory item
- SELECT** the 'Barcode' button



-This opens the Enter a Quantity Screen

A screenshot of a software interface titled "Enter a Quantity". It features a numeric keypad with buttons for digits 0-9, a decimal point, and a less-than sign. To the right of the keypad is a text input field labeled "Quantity". At the bottom of the screen is a large green "OK" button.

- ENTER** the desired quantity
- SELECT** the 'Ok' button
- This opens the Barcode Printer Screen

Barcode Printer

Add Item

Edit Quantity **Delete Highlighted Row**

Quantity	Item
12	Precor EFX 5.37

Starting Row:

Starting Column:

Edit Label

Print Barcodes **Cancel**

- If the label preview (the white space above the 'Edit Label' button) is blank:
- SELECT** the 'Edit Label' button
- This opens the Barcode Manager Screen

Barcode Manager

Move Items from the Left Panel and Position them where you want them to show up on the Avery Label to the right.

The Avery Label

SKU Item Description

SAVE **CANCEL**

- Drag and drop the desired components of the barcode label onto the blank label
- SELECT** the 'Save' button
- This closes the Barcode Manager Screen and re-opens the Barcode Printer Screen
- ENTER** the column number and row number to start printing barcodes on
- SELECT** the 'Print Barcodes' button

A Microsoft Windows screen may open asking which printer to use. Once the printer is selected, the barcodes will begin printing.

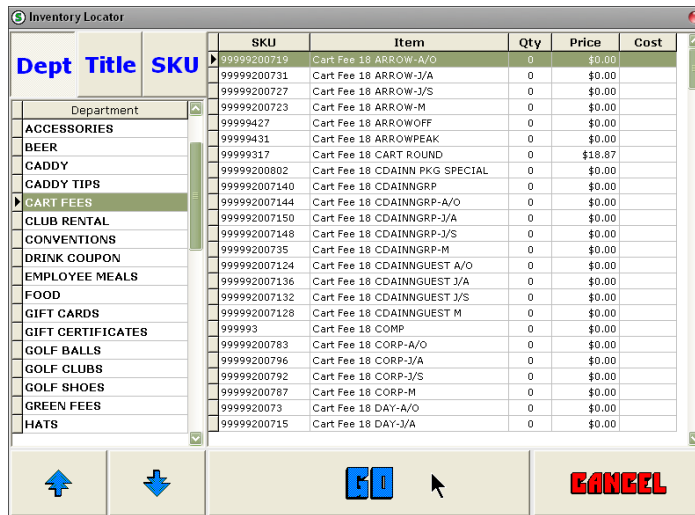
Printing Barcodes for Multiple Items

Once an item has been selected and appears in the Barcode Printer Screen, more items may be added to the print job. To add more items:

-SELECT the 'Add Item' button



-This opens the Inventory Locator Screen



-HIGHLIGHT the department containing the inventory item

-HIGHLIGHT the desired inventory item

-SELECT the 'Go' button

-This will open a Quantity Screen



-ENTER the desired number of labels

-SELECT the 'Ok' button

-REPEAT the above steps for as many inventory items as desired

-ENTER the column number and row number to start printing barcodes on

-SELECT the 'Print Barcodes' button

A Microsoft Windows screen may open asking which printer to use. Once the printer is selected, the barcodes for all the items will begin printing.

Printing High Speed Barcodes

High speed barcodes only work with a specific printer, a Cognitive Advantage LX Direct Thermal Printer. This printer must also have to correct paper type, and be configured in a specific way. Please contact sZen Support **BEFORE** purchasing a high speed barcode printer. Also contact sZen once the printer has arrived, and have sZen Support configure the printer.

To print high speed barcodes:

-**SELECT** Sales from the File menu, and then choose Print High Speed Barcodes from the drop down

-This opens the Select Inventory Screen



-**SELECT** the 'Inv' button

-This opens the Inventory Locator Screen

Dept	Title	SKU	Item	Qty	Price	Cost
		99999200719	Cart Fee 18 ARROW-A/O	0	\$0.00	
		99999200731	Cart Fee 18 ARROW-J/A	0	\$0.00	
		99999200727	Cart Fee 18 ARROW-J/S	0	\$0.00	
		99999200723	Cart Fee 18 ARROW-M	0	\$0.00	
		99999427	Cart Fee 18 ARROWOFF	0	\$0.00	
		99999431	Cart Fee 18 ARROWPEAK	0	\$0.00	
		99999317	Cart Fee 18 CART ROUND	0	\$18.87	
		99999200802	Cart Fee 18 CDAINN PKG SPECIAL	0	\$0.00	
		999992007140	Cart Fee 18 CDAINNGRP	0	\$0.00	
		999992007144	Cart Fee 18 CDAINNGRP-A/O	0	\$0.00	
		999992007150	Cart Fee 18 CDAINNGRP-J/A	0	\$0.00	
		999992007148	Cart Fee 18 CDAINNGRP-J/S	0	\$0.00	
		99999200735	Cart Fee 18 CDAINNGRP-M	0	\$0.00	
		999992007124	Cart Fee 18 CDAINNGUEST A/O	0	\$0.00	
		999992007136	Cart Fee 18 CDAINNGUEST J/A	0	\$0.00	
		999992007132	Cart Fee 18 CDAINNGUEST J/S	0	\$0.00	
		999992007128	Cart Fee 18 CDAINNGUEST M	0	\$0.00	
		999993	Cart Fee 18 COMP	0	\$0.00	
		99999200783	Cart Fee 18 CORP-A/O	0	\$0.00	
		99999200796	Cart Fee 18 CORP-J/A	0	\$0.00	
		99999200792	Cart Fee 18 CORP-J/S	0	\$0.00	
		99999200787	Cart Fee 18 CORP-M	0	\$0.00	
		9999920073	Cart Fee 18 DAY-A/O	0	\$0.00	
		99999200715	Cart Fee 18 DAY-J/A	0	\$0.00	

- HIGHLIGHT the department containing the inventory item
- HIGHLIGHT the desired inventory item
- SELECT the 'Go' button
- This will open a Quantity Screen

- ENTER the desired number of labels
- SELECT the 'Ok' button
- The inventory item and the quantity of labels will be added to the screen
- REPEAT the above steps for as many inventory items as desired
- SELECT the 'Ok' button

The barcodes will proceed to print at a rapid pace.

1.8 Inventory Reconciliation

Sometimes the quantity in stock shown by the sZen system will not match the actual quantity in stock. Loss, theft, and other reasons may cause this. sZen has provided a way to reconcile the actual inventory in stock to the sZen system, and to do it as quickly and efficiently as possible. Inventory Reconciliation requires a User Account with sufficient security rights.

[Printing an Inventory List for Reconciliation](#)

[The Inventory Reconciliation Screen](#)

[Reconciling Inventory](#)

[Reconciling Cost and Retail Price](#)

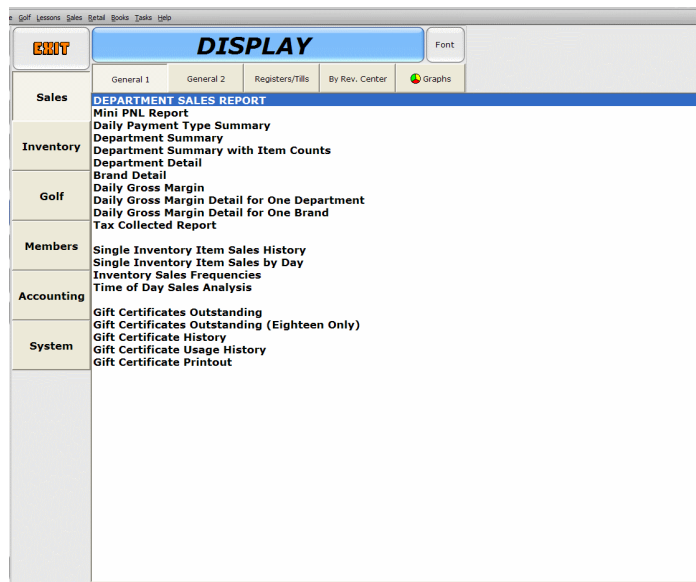
Printing an Inventory List for Reconciliation

When taking inventory, it is helpful to know what inventory items have been entered into the system, and how many the systems says are in stock, if any. The Inventory Taking Detail report has been created for exactly this purpose. To print one of these reports for inventory taking:


-**SELECT** the 'Rpt' button on the left side of the Main Screen



-This opens the Reports Module

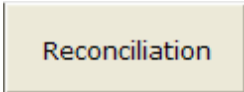


-**SELECT** the 'Inventory' button



Inventory

-**SELECT** the 'Reconciliation' button that will appear along the top of the screen



Reconciliation

-**HIGHLIGHT** the words 'Inventory Taking Detail'

-**SELECT** the 'Display' button



DISPLAY

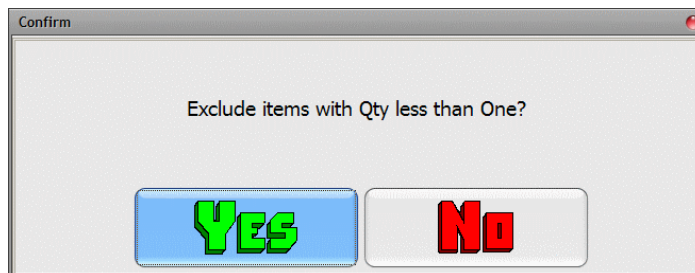
-This will open a Select Sort Method Screen



-**SELECT** the desired sort method

-**SELECT** the 'Ok' button

-A Confirmation Screen will appear



- SELECT the 'Yes' button to exclude items with a quantity less than zero
- SELECT the 'No' button to include items with a quantity less than zero
- A preview of the report will open.
- SELECT the 'Print' button



The print job will be sent to the report printer designated in the global preferences.

The Inventory Reconciliation Screen

Once the Inventory Taking Detail Report has been printed and inventory has been taken, it is now time to make the necessary adjustments to the system to match the actual inventory in stock. This is done from the Inventory Reconciliation Screen.

To get to the Inventory Reconciliation Screen:

- SELECT File from the menu bar and the Inventory Reconciliation from the drop down
- This opens the Inventory Reconciliation Screen

Dept	SKU	Item	Sys Qty	Actual
Accessories	60077	Alps 10-4oz. Sunscreen	9	
Flags	60075	Ball Marker w/ Hat Clip	46	
Clubs	60632	Bigwood Ball Marker	974	
Fitness Equipment	60611	Bigwood Resaver Tool	581	
Footwear	60553	Clanella	0	
Gloves	70910	Excel Giant Grips	3	
Golf Balls	60630	Foot Joy Shoe Lace	34	
Headwear	60633	FootJoy Mens Socks	-1	
Men's Shorts	70927	Golf Grip Wavy Giant Pistol	2	
Old Inventory	60079	Golf Grip - Golf Pride Half Card	102	
Outerwear Ladies	60081	Golf Grip - Larkin	52	
Outerwear Mens	60080	Golf Grip - Slim Dursoft	-2	
Pants Ladies	70911	Golf Grip Crossline String Free	32	
Shirts Ladies	60225	Golf Grip Larkin Crossline Putter	3	
Shirts Mens	60226	Golf Grip Larkin Deep Ethel Putter	6	
Shorts Ladies	60247	Grip Service - Aaron Thompson	-2	
Shorts Skirts Ladies	60246	Grip Service - Scott Syms	-8	
	70093	IGUUGA Rule Books	3	
	70036	JC BTTS Towels	72	
	60100	Laser Link Quick Shot	0	
	60629	Lip Balm	2	
	60078	Lip Ice	60	
	71241	Mau Jim Banyans	2	
	71232	Mau Jim Caroe	2	
	71224	Mau Jim Haeder	0	
	71225	Mau Jim Hapuna	1	
	71206	Mau Jim Kaniapali	2	
	71208	Mau Jim Koki	1	
	71222	Mau Jim Kamana	1	
	71221	Mau Jim Lehua	1	

Reconciling Inventory

Once the Inventory Reconciliation Screen has been opened, reconciling inventory may begin. To do this:

- HIGHLIGHT the desired department on the left
- HIGHLIGHT the 'Actual' column next to the desired inventory item
- ENTER in the correct actual quantity
- PRESS the down arrow to proceed to the next inventory item, or repeat the above steps for another department and inventory item.

Once all the actuals have been entered for the inventory items in need of change:

- ENTER the password of a User with sufficient rights to reconcile inventory

- PRESS** the <ENTER> key on the keyboard
- The 'Post Actual Quantities to Inventory' button will change to say '[User Name], you are now cleared to post'

sZen, you are now cleared to post

All actual quantities will be posted to the inventory.

Reconciling Cost and Retail Price

Cost and Retail Price may also be reconciled from the Inventory Reconciliation Screen. To do this:

- Place a check mark in the box next to the words 'Post to Cost/Retail'
- New fields will appear in the right grid

To edit the cost:

- HIGHLIGHT** the Cost column next to the desired inventory item
- ENTER** the correct cost
- Repeat as necessary

To edit Retail Price

- HIGHLIGHT** the Retail column next to the desired inventory item
- ENTER** the correct retail price
- Repeat as necessary

Once all the correct prices have been entered:

- ENTER** the password of a User with sufficient rights to reconcile inventory
- PRESS** the <ENTER> key on the keyboard
- The 'Post Actual Quantities to Inventory' button will change to say '[User Name], you are now cleared to post'

sZen, you are now cleared to post

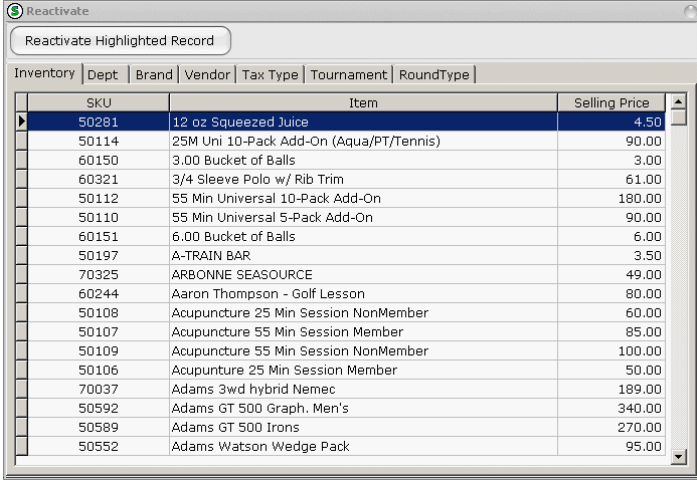
All correct prices will be posted to the inventory.

1.9 Reactivating Inventory

The Reactivate Screen


To reactivate an Inventory Item that has been inactivated:

- SELECT** File from the menu bar and then choose Administrator from the drop down
- This opens the Administrator Screen
- SELECT** General from the menu bar and then choose Bring Back from the Dead from the drop down
- This opens the Reactivate Screen

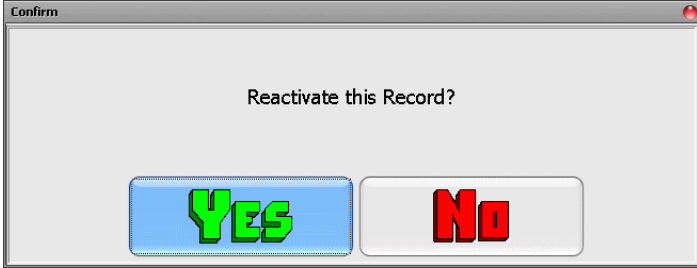


SKU	Item	Selling Price
50281	12 oz Squeezed Juice	4.50
50114	25M Uni 10-Pack Add-On (Aqua/PT/Tennis)	90.00
60150	3.00 Bucket of Balls	3.00
60321	3/4 Sleeve Polo w/ Rib Trim	61.00
50112	55 Min Universal 10-Pack Add-On	180.00
50110	55 Min Universal 5-Pack Add-On	90.00
60151	6.00 Bucket of Balls	6.00
50197	A-TRAIN BAR	3.50
70325	ARBONNE SEASOURCE	49.00
60244	Aaron Thompson - Golf Lesson	80.00
50108	Acupuncture 25 Min Session NonMember	60.00
50107	Acupuncture 55 Min Session Member	85.00
50109	Acupuncture 55 Min Session NonMember	100.00
50106	Acupuncture 25 Min Session Member	50.00
70037	Adams 3wd hybrid Nemec	189.00
50592	Adams GT 500 Graph. Men's	340.00
50589	Adams GT 500 Irons	270.00
50552	Adams Watson Wedge Pack	95.00

- The Inventory Tab is the default tab
- HIGHLIGHT** the desired Inventory Item to be reactivated
- SELECT** the 'Reactivate Highlighted Record' button



- A confirmation Screen will appear



Confirm

Reactivate this Record?

YES **NO**

- SELECT** the 'Yes' button

The highlighted record will be reactivated and will now be able to be used as normal.