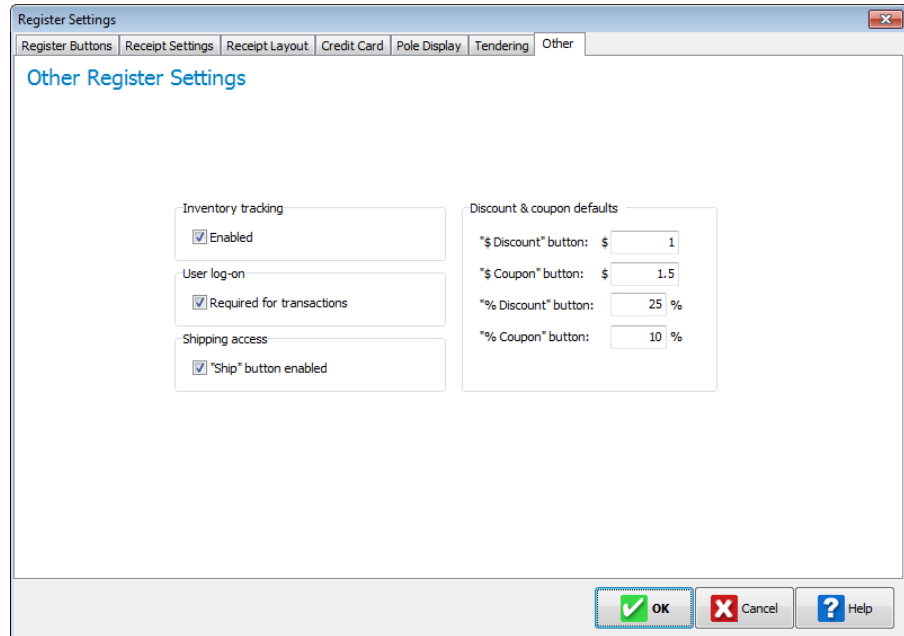


PostalMate’s POS program provides you with tools to track and receive inventory. To begin tracking inventory, you must turn the option on and set up your products to be tracked. The steps below will help you do that.

Turning on Inventory Tracking

1. From the POS Register screen, choose **Tools > Options > Register Settings**.
2. Select the **Other** tab.
3. Choose **Yes** below **Inventory tracking**.
4. Click **OK** to save.



Register Settings

Register Buttons | Receipt Settings | Receipt Layout | Credit Card | Pole Display | Tendering | **Other**

Other Register Settings

Inventory tracking: Enabled

User log-on: Required for transactions

Shipping access: "Ship" button enabled

Discount & coupon defaults:

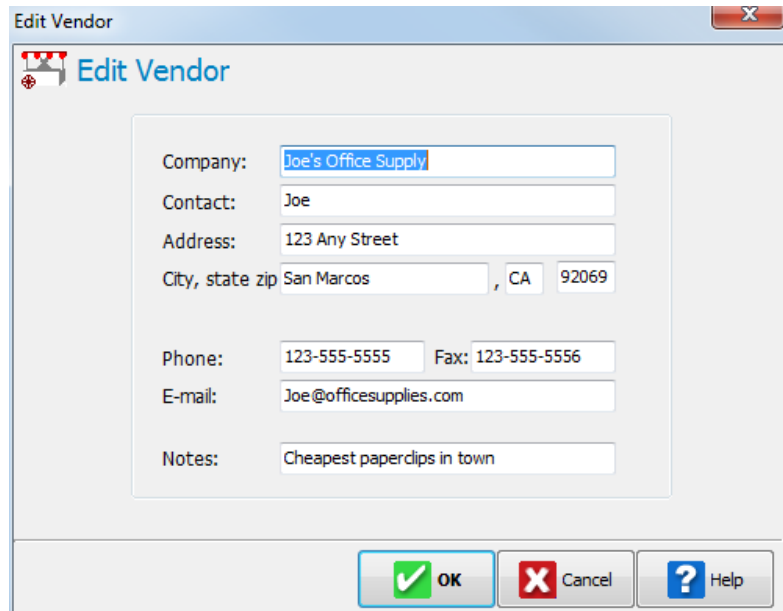
- *\$ Discount* button: \$ 1
- *\$ Coupon* button: \$ 1.5
- ">% Discount* button: 25 %
- ">% Coupon* button: 10 %

OK Cancel Help

Adding Vendors

Add vendors to better monitor where your supplies are coming from and where to place your orders.

1. Choose **Edit > Vendors**.
2. Choose **Add**.
3. Enter the appropriate information and click **OK** to save.
4. Repeat this process to add other vendors.



Edit Vendor

Company: Joe's Office Supply

Contact: Joe

Address: 123 Any Street

City, state zip: San Marcos, CA 92069

Phone: 123-555-5555 Fax: 123-555-5556

E-mail: Joe@officesupplies.com

Notes: Cheapest paperclips in town

OK Cancel Help

Setting Up Products to Track Inventory

1. From the POS Register screen, choose **Edit > Product**.
2. Choose a product you would like to include in inventory tracking by clicking on the product or searching for it. Once you find the first product you would like to include, click **Edit**.
3. Choose the **Buying and Inventory** tab of this product.
4. You will need to fill in all information on this tab for inventory tracking to work properly.
 - a. **Inventory Exempt:** Click the **No** option.
 - b. **Vendor Info:** Select the vendor appropriate for this product and enter any reference or stock number necessary for ordering this product.
 - c. **Units and Quantities:**
 - **Buy Per:** when you buy this product, in what form do you buy it? Is it by the case? The bundle? In our example below, we are buying paperclips by the case. Enter that case here.
 - **Buy Quantity:** if you buy this by the case, how many cases do you buy at a time? How many paperclips are we going to buy?
 - **Sell/ Buy Units:** how many sell units are in the buy unit? Meaning, how many boxes of paperclips are in the case? The case is a buy unit; the box is a sell unit. Enter that number here.
 - **Reorder Level:** How many sell units do you want to be down to before you buy another case? Enter that number here.
 - d. **Wholesale Costs:** Enter the cost per case of this item.
 - e. Count how many boxes of paperclips you have in stock. You will need to adjust your stock and enter that amount. Click **Adjust Stock** and enter the number either in sell or buy units. Click **OK** to save.

Adjust Inventory

Adjust Inventory: Paper Clips

Display in:

- Buy units (case)
- Sell units (Box)

case

Quantity and cost:

Currently on hand: 4 @ \$18.00

Change to: 1 @ 12.00

[Cost is weighted wholesale]

The 'Receive Products' feature provides a much faster and better way to enter new stock received from vendors. From the POS main menu, select Tools > Receive Products.

OK Cancel Help

5. Now your inventory tracking is complete for this product. Here is an example.

Add Product:

Add Product: Paper Clips

General Pricing Buying & Inventory

Inventory exempt:

- Yes
- No

Vendor info:

Vendor name: Joe's Office Supply Vendor's stock number: 123456

Inventory:

On hand: 6 Box

↑↓ Adjust

Last adjusted: 4/18/2012

Units and quantities:

Buy per: case

Buy quantity: 1 case

Sell/buy units: 6 Box per case

Reorder level: 2 Box

Wholesale costs:

Cost per case: \$8.00

Weighted average cost: \$8.00

Cost per Box: \$1.33

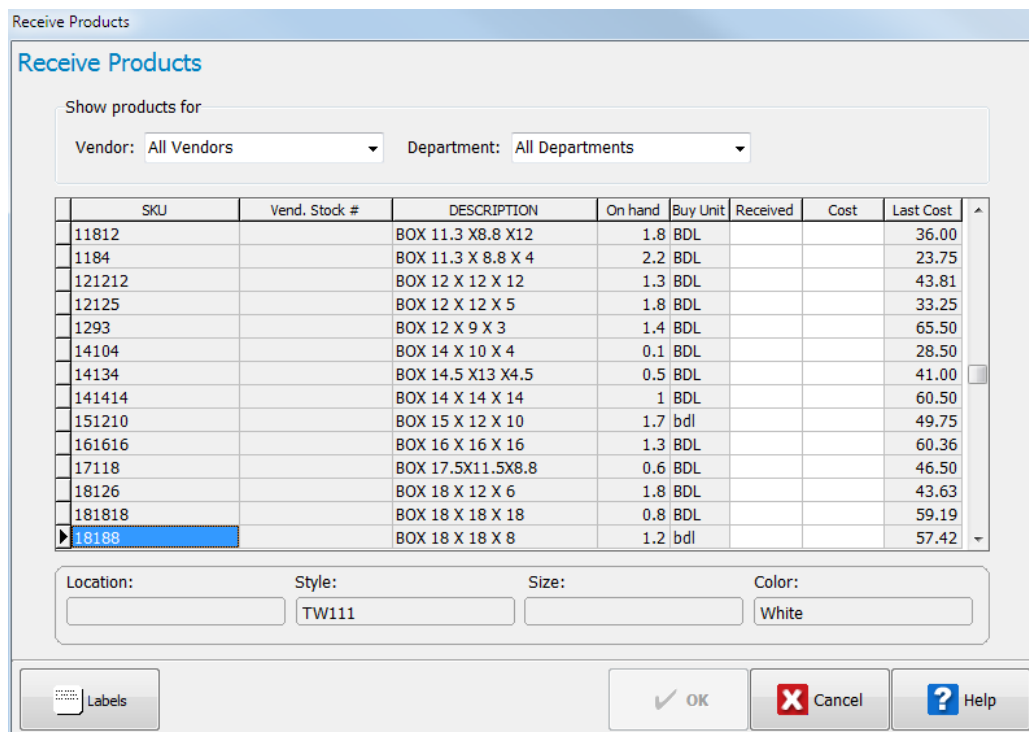
Labels 'Add and duplicate' mode

OK Cancel Help

Inventory Receiving

PostalMate’s POS comes with a useful utility for receiving inventory that allows you to enter all information from one central place rather than edit each product to adjust inventory.

1. Click **Tools > Receive Products**.
2. Select the inventory you would like to add. You may choose to view products by **Vendor** or by **Department**.
3. Using your invoice, packing slip or other order documentation to fill in the number received (in buy units) and the cost per buy unit.
4. Click **OK** and your inventories will be updated.



Receive Products

Show products for

Vendor: All Vendors Department: All Departments

SKU	Vend. Stock #	DESCRIPTION	On hand	Buy Unit	Received	Cost	Last Cost
11812		BOX 11.3 X8.8 X12	1.8	BDL			36.00
1184		BOX 11.3 X 8.8 X 4	2.2	BDL			23.75
121212		BOX 12 X 12 X 12	1.3	BDL			43.81
12125		BOX 12 X 12 X 5	1.8	BDL			33.25
1293		BOX 12 X 9 X 3	1.4	BDL			65.50
14104		BOX 14 X 10 X 4	0.1	BDL			28.50
14134		BOX 14.5 X13 X4.5	0.5	BDL			41.00
141414		BOX 14 X 14 X 14	1	BDL			60.50
151210		BOX 15 X 12 X 10	1.7	bdl			49.75
161616		BOX 16 X 16 X 16	1.3	BDL			60.36
17118		BOX 17.5X11.5X8.8	0.6	BDL			46.50
18126		BOX 18 X 12 X 6	1.8	BDL			43.63
181818		BOX 18 X 18 X 18	0.8	BDL			59.19
18188		BOX 18 X 18 X 8	1.2	bdl			57.42

Location: Style: TW111 Size: Color: White

Labels OK Cancel Help

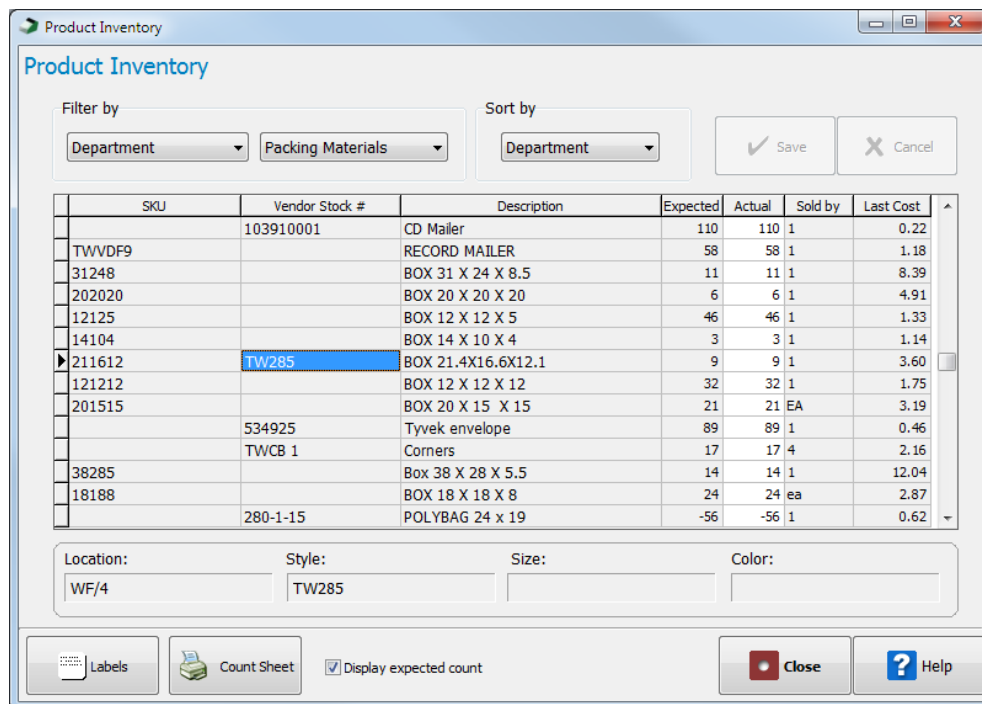
Product barcode labels can be created and can be used in the Receive Product screen to print new bar code labels for the inventory you have received. Please see TechNote titled [Creating Barcode Labels](#) for more information on how to set this up.

Adjusting Inventory

Inventory can be adjusted globally in the POS Register by choosing **Tools > Adjust Inventory**.

This is where you can adjust inventory for all products. Use this tool when:

1. You need to print a count sheet for taking inventory.
2. You have taken inventory and need to adjust your actual stock on hand.
3. You need to print bar coded labels for multiple products.



- You may filter the list of products displayed by All, Department, Location and by Vendor. A secondary filter is also available to sort by Department and by Description.
- Once your products are listed, you may enter the actual amount of each product you have in your store. The **Save** button is available to intermittently save the amounts you have entered.
- The **Count Sheet** can be printed out for taking physical inventory.
- Bar Code labels may be printed out by using the **Labels** button on this screen. (see TechNote titled [Creating Barcode Labels](#) for information on setting this up in the POS.