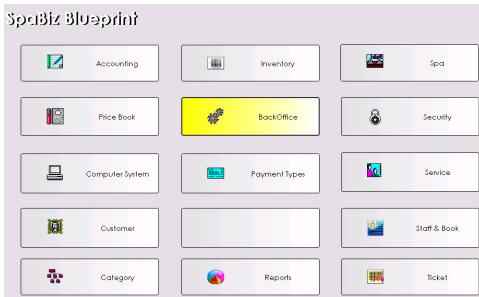


master products

an Enterprise Only Feature

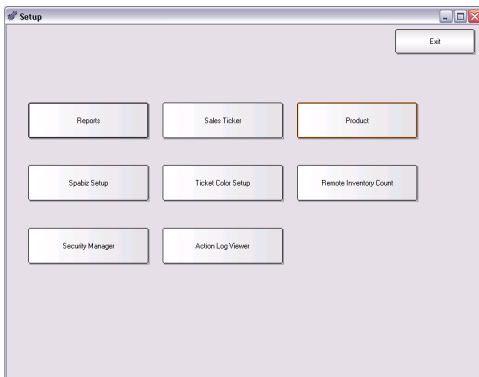
Use this guide to maintain your inventory using BackOffice



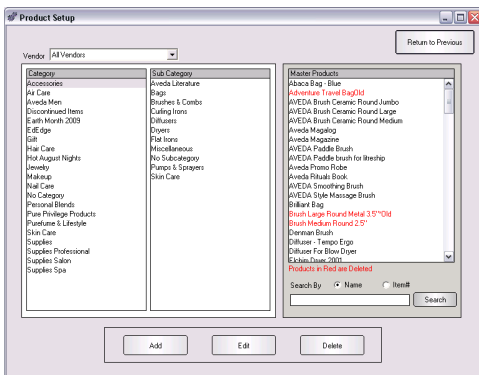
Master Products

A master product record is created to serve as the source of information for all products in each location.

1. From the SalonBiz®/SpaBiz® menu bar, click on the Blueprints icon.
2. Click on the BackOffice button.
 - ❖ Access to BackOffice can be secured through Security settings in Blueprints.
3. Select the Product button
 - ❖ BackOffice provides access to advanced features. These features can be turned on or off, depending on your needs.



4. The Product Setup screen allows you to add new or edit existing master products.
5. Use the Vendor drop down menu to sort your product list by vendor name.
 - ❖ Once the Master Product merge is complete, ALL products will need to be added, edited and deleted through this tool and not through the Inventory button in Blueprints. This will ensure product information is maintained centrally for all of your locations. If anything is entered in the inventory section of the software, it will not be part of the master product database (nor will it be linked to anything).



Editing Master Products

The Product screen allows you to add and edit product information for all locations from a single place.

- The product details are entered and edited through this screen.
- When the Update button is clicked, the program will ask if you want to sync the changes to the locations. This allows you to cancel the process before any changes are made. Select 'Yes' to update products.
 - ❖ You will be allowed to change location specific information using the Location Data button.
- Deleting a product can only be done if the Quantity on Hand count in each location is zero. Deleting will remove the product from each location's product list, but it will remain in the master product list in red text. Once a product has been marked deleted, the master product record cannot be edited.

1. To add a master product, click the Add button.
2. Type in the name of your product and its product code.
3. Click the Add button.
4. Begin editing the details of the item

Update Options

You have flexibility when updating certain item information. When viewing a specific item in the Product Setup screen, you can choose to update individual fields as well as an Update All Data button.

The Update buttons will automatically update the information found within their corresponding area. You will be asked whether or not you would like to update location product information. If the manager chooses to update location product information, all data within the bounds of the update button will be reset to match the master product data.

If the manager chooses not to update the location product data, then changes made will be saved only to the master product. Choosing "Update All Data" button will update all product data on this screen.

The fields to edit and update are as follows:

Product Information:

- Name
- Item Number
- Category
- Sub Category
- Bar Code Label Name and Printing Instructions
- Size
- Status
- Location
- Usage Instructions



Inventory Information:

- Manufacturer Name and Code
- Vendor Name and Code
- Default Staff
- G/L Account
- Tax Information
- Product Type

Pricing Information:

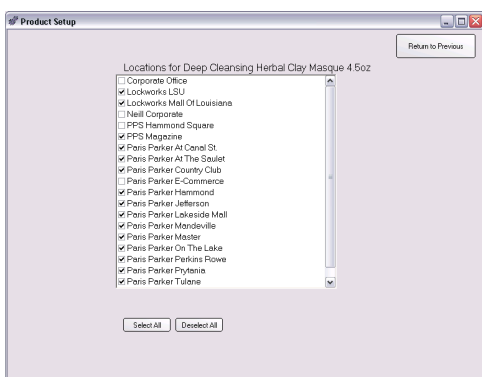
- Purchase Price
- Retail
- Margin

Special Qty Pricing

- Order Qty
- Min/ Max
- Reorder

Order Qtys

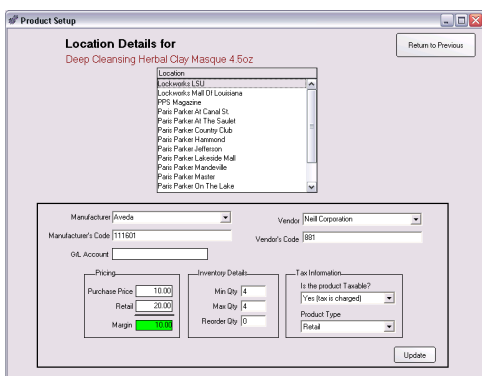
- Min Qty
- Max Qty
- Reorder Qty



Select Locations

Use this screen to specify which locations will carry the item.

- Check the boxes for the locations that will carry the item. Use the button navigation at the bottom of the window to Select All or Deselect All locations.
- If you want to remove the item from a location, the quantity on hand at the location must be zero.
- Click the Return to Previous button when finished.



Location Details

This allows you to maintain the specific details for each item in the selected locations.

- Select by clicking once on the desired location, then you can update the fields with the specific location information and then click the Update button to save your changes.
- Click the Return to Previous button when finished.



frequently asked questions

How do I perform my regular inventory operations?

Regular daily inventory operations such as inventory counts, purchase orders and receiving orders are still performed in their respective section of the inventory module of the software (as they were before product sharing).

What if different locations have different prices?

Once the item information is added, you have the ability to select the store location that will carry the product. You can then customize the product price information for each of the selected locations

What data is kept specific to each location?

The following data is kept specific: on-hand quantity, on-order quantity, product min level, product max level, cost, retail and GL account.

What if I add a new location?

You will use the Select Locations screen to link each item that is carried in the new location.

What if I add an item in Blueprints/Inventory?

You will need to delete the item in Blueprints/Inventory and add it correctly in Blueprints/BackOffice.

