

Merchandise Guide

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Merchandise

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You can sell merchandise items such as apparel and souvenirs. Before you begin to sell merchandise, go to *Merchandise* to create merchandise departments and add vendors and merchandise to your inventory. You can also print labels, search for merchandise and vendors, and create discounts for merchandise. After you add merchandise to inventory, you can sell it from *Sales*

For information about how to sell merchandise, see the *Sales Guide*.

Merchandise Setup Checklist

The following checklist is a suggested workflow for initial configuration. The tasks are presented in a specific order because some tasks build on others. While some tasks, like add vendors and departments must be configured by all organizations, a number of configuration tasks are optional. The tasks your organization needs to complete is directly related to your business processes.

- Add vendors. Before you can add merchandise, you need to add vendors. Vendors are the suppliers of your merchandise. For more information, [Vendors on page 9](#).
- Add departments. Departments are how you define your merchandise. For example, you may create a department of Apparel for clothing. Within departments, you can also create categories. Categories allow you to further define your merchandise. For example, within the department of Apparel you can create a category of "Men's". For more information, see [Merchandise Departments on page 7](#).
- Add merchandise. After you set up vendors and departments you are ready to add merchandise. When you add merchandise you enter information about an item such as name, cost, sale price, quantity, dimensions. For more information, see [Add Merchandise on page 13](#).
- Set up discounts. After you add departments and merchandise you can set up discounts. You can set up discounts based on department or inventory item. For more information, see [Merchandise Discounts on page 6](#).
- Set up taxes. You can configure merchandise taxes in *Merchandise* or *Tickets*. You can set one tax as the default applied to new merchandise items. For more information, see [Merchandise Taxes on page 7](#).
- Print labels. After you add merchandise, you can print labels for them. If you do not have the recommended printer or labels, you can export the labels and print using a different printer. For more information, see [Print or Export Merchandise Labels on page 16](#).

Merchandise Discounts

To provide an incentive for patrons to purchase merchandise, you can offer discounts on the items you sell. The discounts you configure and offer depend on the business processes of your organization. You can set up standard discounts, required purchase discounts, and quantity-based discounts.

With standard discounts, you can configure a basic discount that reduces the price of designated items or the entire order. You can also you can configure discounts that require a purchase to receive the discount benefit. Additionally, you can configure discounts that are based on the quantity of items purchased. For information and procedures that guide you through the discount setup process, see the Discounts and Promotions chapter of the *Tickets Guide*.

In addition to setting up discounts to apply to merchandise, you also need to configure settings on the merchandise department record and merchandise record to control what is eligible to be discounted.

On each department record, the **Discounts allowed on merchandise in this department** checkbox is selected by default. With this option selected, discounts configured for merchandise can be applied when items from this department are sold. If this option is not selected, no merchandise within the department is eligible to be discounted. For more information, see [Merchandise Departments on page 7](#).

To allow some items within a department to be discounted while others are not, you should leave the **Discounts allowed on merchandise in this department** checkbox selected on the department record and disallow discounts on a per-item basis. To do this, you clear the **Discounts allowed** checkbox when the merchandise is added or edited. For more information, see [Add Merchandise on page 13](#).

Merchandise Taxes

To charge taxes on merchandise during a sales process, you must add each required tax to the system and configure the rate. You can add a simple tax that includes a single rate or you can add a tax with multiple entities, each with its own tax rate.

You can configure taxes from *Tickets* under **Pricing** or *Merchandise* under **Configuration**. Click **Taxes** to open the taxes page.

On the Add/Edit tax screen, you can set one tax as the default for new merchandise items. For example, if you have a local sales tax requirement, you can set it as the default. When you add a merchandise item, the default tax is selected automatically, but you can choose another to apply.

Note: The default setting does not apply to merchandise items added before the 4.1 upgrade. A "Generated merchandise tax" is applied to existing merchandise. This tax combines all taxes that were applicable to merchandise before the upgrade.

On the Merchandise tab of the tax record, you can quickly view all merchandise items the tax applies to. You can also add other merchandise items directly to the tax. For example, if you have a local junk food tax, you can add which food items the tax applies to.

For more information about how to configure merchandise taxes, refer to the *Tickets Guide*.

Merchandise Departments

Before you add merchandise to your inventory, you must add merchandise departments to help organize the items you sell. For example, common merchandise departments include "Apparel" and "Books." Within each department you can add categories to further define the items you sell. For example, within the "Apparel" department, you may define categories for "Men," "Women," and

“Children.” Additionally, when you configure departments, you also determine whether the merchandise in that department can be discounted.

For information about how to edit categories, see [Edit merchandise department or category](#).

> Add a merchandise department

1. From *Merchandise*, click **Merchandise Departments**. The Merchandise Departments page appears.
2. Click **Add**. The Add a merchandise department screen appears.

Category name	Category description
*	

3. Under **Department information**, enter the name and description for the merchandise department.
4. The **Discounts allowed on merchandise in this department** option is selected by default. If this option is selected, discounts configured for merchandise can be applied to items sold within this department. If merchandise in this department should not be discounted, clear the checkbox.

Note: The **Discounts allowed on merchandise in this department** option determines whether merchandise is eligible to be discounted. If eligible, you can set up specific discounts that are applied to the items during a sale. For information to help you set up merchandise discounts, see the Discounts and Promotions section of the *Tickets Guide*.

Warning: If you mark **Discounts allowed on merchandise in this department**, you can still mark specific merchandise in that department as non-discountable on each respective

merchandise record. If you make specific merchandise non-discountable and then later clear and re-select the **Discounts allowed on merchandise in this department** option, any specific merchandise you previously marked as not discountable will be reset and discounts will be allowed.

- To create categories, under **Department categories**, enter the name and description for the categories within the department.
- Click **Save**. You return to the Merchandise Departments page.

Vendors

Before you can add merchandise, you have to add vendors. Vendors supply your organization with merchandise. After you add vendors, you can search for a vendor and view information such as the merchandise a vendor supplies and contact information.

Search for Vendors

You may want to search for a vendor for contact information, view supplied merchandise, or edit vendor information. When you search for a vendor, you can search on name, lookup ID, address information, department, or SKU/barcode.

> Search for a vendor

- From *Merchandise*, click **Vendor Search**. The Merchandise Vendor Search screen appears.

- Enter the search criteria, such as name, lookup, or address information. For information about the

search fields, see [Vendor Search Screen on page 10](#)

3. Click **Search**. The Search results appear.
4. Select the vendor you want and click **Select**. The Vendor record appears. For information about the Vendor record, see [Vendor Record on page 12](#).
5. If you cannot find the vendor, to add a vendor click **Add**. The Add a vendor screen appears. For information about how to add a vendor, see [Add Vendors on page 11](#).

Vendor Search Screen

The table below explains the Vendor Search screen. For information about how to access this screen, see [Search for Vendors on page 9](#)

Screen Item	Description
Name	Enter the Vendor name or primary contact name.
Lookup ID	Enter the Vendor lookup ID number. This number is unique to the vendor and is generated by the program.
Department	Enter the department that the vendor provides merchandise for. For example, if the vendor provides merchandise for your apparel department, enter "Apparel."
SKU/barcode	Enter the SKU/barcode of the item the vendor provides. For example, if the vendor provides the Whale T-shirt that you sale, enter the SKU/barcode of the Whale T-shirt.
Country	Enter the country of the vendor
Address	Enter the address lines, such as 7930 Baker Street. You can search by entering the beginning street numbers. For example, you can enter "79" to bring up all street addresses beginning with 79. You can use a wildcard character to search only by street name; *Baker Street or %Baker Street brings up all addresses containing Baker Street.
City	Enter the city or town. You can enter the entire city name or beginning letters.
State	Select the appropriate state.
ZIP	Enter the Zip code. You can enter the entire code or the beginning digits.
Search (button)	After you enter criteria, to activate the search, click the button.
Clear (button)	To remove your criteria and begin a new search, click the button.

Screen Item	Description
Results (grid)	The search results appear in this bottom grid. Select a constituent from the grid to open.
Add (button)	To add a new vendor, click Add . For information about how to add a constituent, see Add Vendors on page 11 .
Select (button)	In the Results grid, select a constituent and click the button. The constituent page appears.

Add Vendors

To add vendors to the program, go to *Merchandise* and click **Add a vendor**. When you add a vendor, you enter information such as name, address, description. You can also add a primary contact for the vendor. After you add a vendor, you can associate merchandise with the vendor. For information about how to add merchandise, see [Add Merchandise on page 13](#).

> Add a vendor

1. From *Merchandise*, click **Add Vendors**. The Add a vendor screen appears.

Add a vendor

Vendor Primary contact

Vendor details

Name:

Description:

Image:  [Choose file](#) [Clear file](#)

Contact information

Address type:

Country:

Address:

City:

State:

ZIP:

Phone type:

Phone:

Email type:

Email:

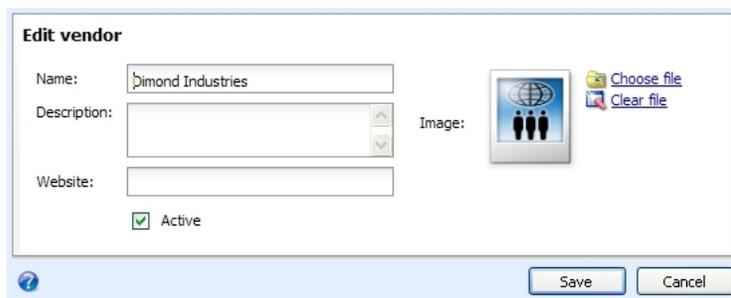
Website:

Save Cancel

2. On the Vendor tab, under **Vendor details**, enter the vendor name and description and select an image for the vendor.

> Edit vendor

1. On the Vendor page, click **Edit vendor under Tasks**. The Edit a vendor screen appears.



2. You can edit the name, description, and website of the vendor. You can also edit the image and mark the vendor active or inactive. To mark the vendor as inactive, clear the **Active** checkbox.
3. Click **Save**. You return to the Vendor page.

Delete vendors

On the Vendor page, you can delete the vendor. To delete a vendor, click **Delete vendor under Tasks**. A confirmation message appears. Click **Yes**. The vendor is removed.

Mark vendors active or inactive

On the Vendor page, you mark a vendor as active or inactive. To mark a vendor as active or inactive, click **Mark vendor inactive or active**.

Add Merchandise

After you create departments and categories and add vendors, you can add merchandise to your inventory. When you add merchandise, you have the option to apply dimensions to your merchandise. Dimensions allow you to add characteristics about your merchandise and create additional inventory items. For example, if you add a Whale T-shirt as merchandise without dimensions, you can only have inventory item of Whale T-shirt. If you add a Whale T-shirt with dimensions of size and color, you can then create multiple inventory items for the different sizes and colors of the Whale T-shirt. You can also decide if the merchandise is eligible for discounts.

> Add a merchandise item

1. From *Merchandise*, click **Add merchandise**. The Add merchandise screen appears.

Add merchandise

Merchandise information

Name:

Description:

Image: 

Department:

Category:

Vendor:

Discounts allowed

Tax:

Merchandise details

Enter sales settings, or select "Merchandise includes dimensions." For multiple inventory items, enter dimensions. For example, to base T-shirt prices on size and color, enter "Size" and "Color." Then on the merchandise page, you can create inventory items with designated sizes and colors.

Merchandise includes dimensions

Cost:

Retail price:

Quantity:

	Value
Barcode/alternate lookup:	* <input type="text"/>

2. Under **Merchandise information**, you enter information about the merchandise.
 - Enter a **Name** and **Description**.
 - In the **Department** field, select a department for the product. To add a department, click the icon and enter the name and description for the department.
 - In the **Category** field, select a category. To add a category, click the icon and enter the name and description for the category.
 - In the **Vendor** field, select the vendor that supplies this item. To add a new vendor, click

Add. For information about how to add a vendor, see [Add Vendors on page 11](#).

- To allow discounts on the merchandise, select **Discounts allowed**. If you clear this option, the merchandise is non-discountable.

Warning: If you clear **Discounts allowed** and then later on the department record you clear and then re-select the **Discounts allowed on merchandise in this department**, any specific merchandise you previously marked as not discountable will be reset and discounts will be allowed.

- In the **Tax** field, select which tax to apply. The default merchandise tax is selected automatically, but you can select another from the drop-down.
- To add a picture of the item, in the **Image** field, click **Choose file** and select the image file. To remove the image selected, click **Clear file**.

3. Under **Merchandise details**, you enter details about the merchandise such as cost and quantity, or dimensions.

- If the merchandise is available with different dimensions, select **Merchandise includes dimensions**. Dimensions allow you to enter characteristics about the merchandise, such as size and color, to create additional inventory items. For example, if a T-shirt may come in different sizes and colors. In the dimensions grid, enter rows for "Size" and "Color." Then on the merchandise page, you can add the different sizes and colors to create additional inventory items. For more information, refer to [Add an inventory item on page 20](#).

Note: You cannot add multiple inventory items for merchandise if you do not include dimensions.

- If the merchandise does not include dimensions, enter the cost, retail price, quantity, and barcode.
4. Click **Save**. The Merchandise page appears. For information about the merchandise page, see [Manage Merchandise on page 18](#).

Search for Merchandise

To locate merchandise in the system, use **Merchandise Search**. To access the **Merchandise Search**, from *Merchandise*, select **Merchandise Search**. The Merchandise Search screen appears.

Merchandise Search

Name: Vendor: Search

Department: SKU/UPC: Clear

Category: Include inactive

Results Add Select

Name	Department	Category	Vendor
------	------------	----------	--------

You can search by merchandise name, department, category, vendor, and SKU/barcode. To include inactive merchandise, select **Include inactive**.

After you enter your criteria, click **Search**. All merchandise that satisfy your criteria appear in the search grid.

Print or Export Merchandise Labels

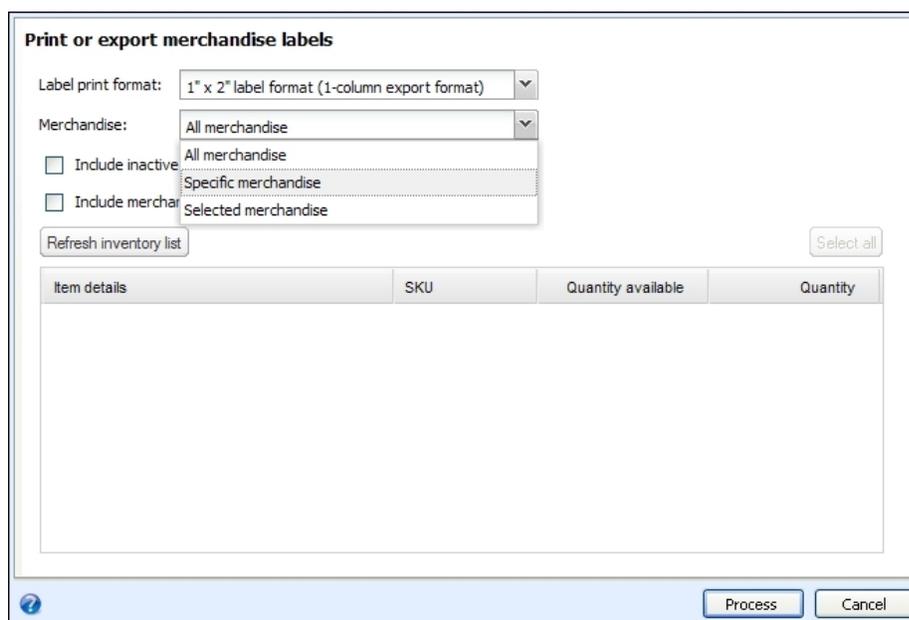
You may need to print or export labels for your merchandise, when you receive new merchandise or additional inventory, or labels are missing. If you do not have the recommended printer and labels, you can export the list of labels and print using other printers and labels. When you print labels, you can select a 1-column format or a 3-column format. We recommend you use the Zebra LP 2824 Plus label printer to print the 1-column format labels. You can print the 3-column with any standard 3 column label paper and printer.

You can also print or export merchandise labels from the merchandise record. However, when you print from a merchandise record, you can only print the inventory items for that merchandise. For information about how to print from a merchandise record, see [Print or Export Labels on page 22](#).

For information about the merchandise labels page, see [Merchandise Labels Page on page 17](#).

> Print or export a merchandise label

1. From *Merchandise*, click **Merchandise labels**. The Print or export inventory item labels screen appears.



Print or export merchandise labels

Label print format: 1" x 2" label format (1-column export format) ▼

Merchandise: All merchandise ▼

Include inactive

Include merchandise with no available inventory

Refresh inventory list Select all

Item details	SKU	Quantity available	Quantity

Process Cancel

2. In the **Label print format** field, select the print format. You can select a 1-column format or a 3-column format. We recommend you use the Zebra LP 2824 Plus label printer to print the 1-column format labels.
3. In the **Merchandise** field, select if you want to view all merchandise, specific merchandise, or selected merchandise.
 - If you select **All merchandise**, all available inventory items are displayed.
 - If you select **Specific merchandise**, a search field appears for you to search for merchandise. For information about how to search for merchandise, see [Search for Merchandise on page 15](#).
 - If you select **Selected merchandise**, a search field appears for you to search for multiple merchandise.
4. To include inactive merchandise, select **Include inactive**.
5. To include merchandise with no available inventory, select **Include merchandise with no available inventory**.
6. Click **Refresh inventory list**. The inventory that matches your selected criteria appears.
7. In **Quantity**, enter the number of labels needed to print or export for each item. To print or export all available inventory, click **Select all**.
8. Click **Process**. The Merchandise Labels page appears.
9. On the Merchandise Labels page, you can print or export files to *.CSV. For information about the Merchandise Labels page, see [Merchandise Labels Page on page 17](#).

Merchandise Labels Page

After you enter the quantities of the labels you want or print to export and click **Process**, You arrive on the Merchandise Labels page. On this page, you can view the labels, change the format, and print or

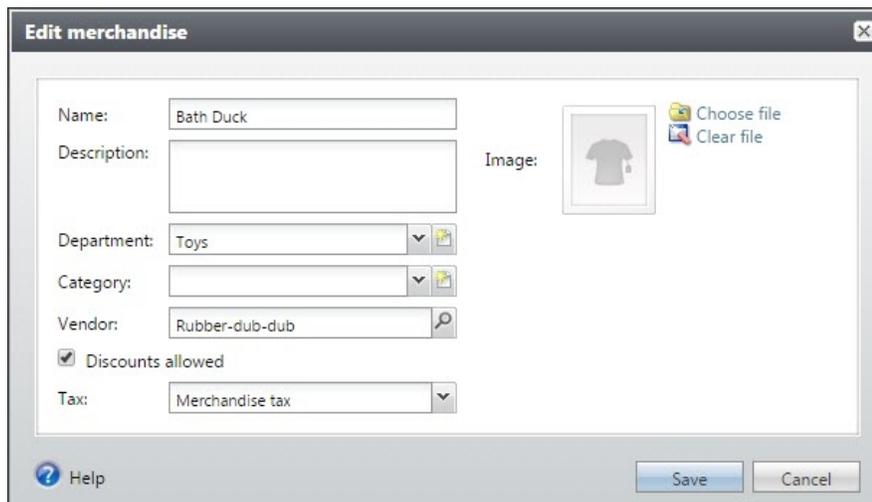
export labels. To change the format, under **Change format**, click **Show label format**. To export the labels, click the export icon. To print the labels, click the print icon.

Manage Merchandise

You can manage specific merchandise from its record. To view the merchandise record, search for the merchandise you want to manage. For information about how to search for merchandise, see [Search for Merchandise on page 15](#). The merchandise record contains information about the inventory. You can view summary information and on the Inventory tab, you can view detailed information such as the current cost, average cost, retail price, and quantity.

Edit Merchandise

To edit merchandise, on the Merchandise page, under **Tasks**, click **Edit merchandise**.



The Edit merchandise item screen appears. On this screen you can change the name and description of the merchandise, select a different department to associate with the merchandise, select a different tax to apply, or make the merchandise non-discountable by clearing the **Discounts allowed** option. Make the necessary changes and click **Save**. You return to the Merchandise page.

Warning: If you clear the **Discounts allowed** option to make merchandise non-discountable and then later on the department record you clear and then re-select the **Discounts allowed on merchandise in this department**, any specific merchandise you previously marked as not discountable will be reset and discounts will be allowed.

Edit Dimensions

To edit the merchandise dimensions, on the Merchandise page, under **Tasks**, click **Edit dimensions**. The Edit dimensions screen appears.

Edit dimensions

Style

Long Sleeve	▲
Short Sleeve	☰
	▼

Size

Small	▲
Medium	☰
Large	▼

Color

Yellow	▲
Green	☰
Blue	▼

Save Cancel

Edit the dimensions as necessary and click **Save**. You return to the Merchandise page.

Manage Inventory

On the Inventory tab, you can manage the inventory items available for a merchandise record.

If the merchandise includes dimensions, you can add specific inventory items. For example, if the merchandise record is a whale T-shirt with a dimension of size, you can add inventory items for each available size.

If the merchandise record does not include dimensions, it includes one inventory item. You cannot add more than one inventory item to a merchandise record that does not include dimensions.

Tip: From *Merchandise*, you can access and run reports that help you monitor sales numbers and inventory levels. With the Inventory Report and the Merchandise Sales Report, you can stay aware of

sales trends and react appropriately. For example, you can reorder popular items to maintain stock levels or create discounts to spur sales of less popular items. For more information, see [Merchandise Reports on page 32](#).

> Add an inventory item

1. On the merchandise record, select the Inventory tab. To access a merchandise record, you must search for the merchandise. For information about how to search for merchandise, see [Search for Merchandise on page 15](#).

Note: You cannot add inventory items for merchandise without dimensions. To add dimensions to merchandise, you must delete the existing merchandise record and add it again with dimensions.

2. Click **Add**. The Add an inventory item screen appears.

The screenshot shows a dialog box titled "Add an inventory item". It contains the following fields and controls:

- Size:** A dropdown menu.
- Color:** A dropdown menu.
- Image:** A dropdown menu with a small image icon to its right.
- Cost:** A text box containing "\$0.00".
- Retail price:** A text box containing "\$0.00".
- Quantity:** A text box containing "0".
- Barcode/alternate lookup:** A grid with a header "Value" and a row containing an asterisk "*".

At the bottom of the dialog, there is a "Help" button with a question mark icon, and "Save" and "Cancel" buttons.

3. Enter the dimension information for the inventory item. For example, if a T-shirt has a dimension of "Size", you can enter "Medium."
4. In the **Cost** field, enter the amount that your organization paid for the item.
5. In the **Retail price** field, enter the amount that your organization sells the item for.
6. In the **Quantity** field, enter the number of items you have available.
7. In the **Barcode/alternate lookup** grid, enter the merchandise barcode. The barcode is usually

shipped on the merchandise. If the merchandise does not have a barcode, you can enter your own barcode in this field using letter and numbers.

You can also enter alternate lookup IDs to make items easier to find in searches. For example, you can store the ISBN for a book, or enter different barcodes for an item that comes from multiple distributors. You can search for the item by the SKU, user-defined barcode, or the alternate lookup ID.

Note: *Altru* does not generate barcodes automatically.

8. Click **Save**. You return to the Merchandise Record page.

> Change Inventory

You can also update your inventory on-hand if necessary, such as to adjust inventory quantity or add an inventory shipment.

1. On the merchandise record, select the Inventory tab. To access a merchandise record, you must search for the merchandise. For information about how to search for merchandise, see [Search for Merchandise on page 15](#).
2. Select the inventory item to update, and click **Change inventory**. The Change inventory screen appears.

3. Change the inventory as necessary:
 - To enter a new quantity on hand, select **Set physical count**, and enter the new quantity.
 - To add a new inventory shipment, select **Add inventory shipment**. You can update the vendor and unit cost and quantity of the item. To use the unit cost from the inventory shipment as the current cost, select **Update current cost**.

- To adjust the quantity on hand, select **Adjust quantity** and, in the **Adjust by** field, add or subtract the number of items.

When you adjust the quantity, you must also enter a reason as to why the adjustment was made.

4. In the **Comments** field, enter any information about the change in inventory that may be necessary or helpful.
5. Click **Save**. You return to the merchandise record.

Inventory History

The History tab of a merchandise item record displays every update made to its inventory, such as new shipments of the item, and changes to the physical count.

You can filter the list to display changes made in specific date ranges, changes of specific action types, and whether the update to inventory was made manually or through batch.

Action	Date	Source	Change	Ending inventory	Unit Cost	Vendor
Shipment	4/26/2013 10:54:59 AM	Manual	20	35	\$20.00	Diamond Industries
Adjustment	4/26/2013 10:54:07 AM	Manual	5	15		

Note: Unit cost and quantity appear on the History tab of the item record, but vendor and barcode information only appears on the Inventory tab.

Print or Export Labels

On the Inventory tab of the Merchandise page, you can print or export labels for the inventory items on the current merchandise record. For example, if you have a Whale T-shirt with inventory items for blue and red versions of the shirt, you can print or export labels for only those two items. To print or export labels for more than one merchandise, you can do so from *Merchandise*, **Merchandise labels**. For more information, see [Print or Export Merchandise Labels on page 16](#).

> Print or export labels

1. On the Merchandise page, select the Inventory tab. For information about how to access the Merchandise page, see [Search for Merchandise on page 15](#).
2. Click **Print labels**. The Print or export inventory item labels screen appears.

Print or export merchandise labels

Label print format: 1" x 2" label format (1-column export format) Select all

Item details	SKU	Quantity available	Quantity
Whale Shirt - large;red	SKU010000006	30	0
Whale Shirt - medium;blue	SKU010000005	20	0
Whale Shirt - small;white	SKU010000004	20	0

Process Cancel

3. In the **Label print format** field, select the column format you want. You can select the 1-column format or 3-column format. We recommend you use the Zebra LP 2824 Plus label printer for the 1-column format. The 3-column format prints on any standard 3 column label paper. If necessary, you can also export the labels to *.csv to use with the printer of your choice.
4. Under **Quantity**, enter the number of labels needed. To print labels for all available inventory items, click **Select all**.
5. After you enter all the quantities, click **Process**. The Merchandise Labels page appears. On this page, you can print or export your labels. For information about the Merchandise Labels page, see [Merchandise Labels Page on page 17](#)

Documentation

On the Documentation tab, you can add notes to track helpful or interesting information about your records. You can save links to websites or related materials stored outside of the program. You can also attach items directly to records. When you attach a file, the program stores a copy in the database.

Attachments

You can attach items to records. When you attach a file, the program stores a copy in the database.

Add Attachments

You can use attachments to track additional details about records. When you attach a file, the program stores a copy in the database.

> Add an attachment

1. Go to the Documentation tab of a record.
2. Click **Add attachment**. The Add an attachment screen appears.

3. Select an attachment type. Enter the date, title, and author. To search for the attachment, click **Choose file**.
4. Click **Save**. You return to the Documentation tab.

Add an Attachment Screen

Screen Item Description

Type	Select the type of attachment. The system administrator configures attachment types.
Date	Enter the date of the attachment.
Title	Enter the title, or purpose, of the attachment.
Author	To search for the author, click the binoculars. A search screen appears.
File	To locate the attachment, click Choose file . To view an attachment, click Open file . To remove an attachment, click Clear file .

Edit Attachments

On the Documentation tab, you can edit an attachment. You can remove a file and choose a different file. You can also view an attachment.

> Edit an attachment

1. Go to the Documentation tab of a record.
2. Click the double arrows beside an attachment and click **Edit**. The Edit attachment screen appears.
3. Make changes as necessary to the attachment type, date, title, or author. To view an attachment, click **Open file**. To remove an attachment, click **Clear file**. To select a different file, click **Choose file**.
4. Click **Save**. You return to the Documentation tab.

Delete Attachments

After you add an attachment to the Documentation tab, you can delete it as necessary.

> Delete an attachment

1. Go to the Documentation tab of a record.
2. Click the double arrows beside an attachment and click **Delete**. A confirmation message appears.
3. Click **Yes**. You return to the Documentation tab, and the attachment no longer appears.

Media Links

On the Documentation tab, you can save links to websites or related materials stored outside of the program.

Add Media Links

When you add a media link, you enter the website address.

> Add a media link

1. Go to the Documentation tab of a record.
2. Click **Add media link**. The Add a media link screen appears.
3. Select a media link type. Enter the date, title, and author. Enter the URL for a website.
4. Click **Save**. You return to the Documentation tab.

Add a Media Link Screen

Screen Item	Description
Type	Select the type of media link. The system administrator configures media link types.
Date	Enter the date of the media link.
Title	Enter the title, or purpose, of the link.
Author	To search for an author, click the binoculars. A search screen appears.
Media URL	Enter the URL for a website.

Edit Media Links

You can edit the URL for a website.

> Edit a media link

1. Go to the Documentation tab of a record.
2. Click the double arrows beside a media link and click **Edit**. The Edit media link screen appears.
3. Make changes as necessary to the media link type, date, title, or author. You can edit the URL for a website.
4. Click **Save**. You return to the Documentation tab.

Delete Media Links

After you add media links to the Documentation tab, you can delete them as necessary.

> Delete a media link

1. Go to the Documentation tab of a record.
2. Click the double arrows beside a media link and click **Delete**. A confirmation message appears.
3. Click **Yes**. You return to the Documentation tab, and the media link no longer appears.

Notes

On the Documentation tab, you can add notes to track helpful or interesting information about your records.

Add Notes

On the Documentation tab, you can track notes about your records.

> Add a note

1. Go to the Documentation tab of a record.
2. Click **Add note**. The Add a note screen appears.
3. Select a note type. Enter the date, title, author, and the content of the note.
4. Click **Save**. You return to the Documentation tab.

Add a Note Screen

Screen Item	Description
Type	Select the type of note. The system administrator configures note types.
Date	Enter the date of the note.
Title	Enter the title, or purpose, of the note.
Author	To search for an author, click the magnifying glass. A search screen appears.
Notes	Enter the content of the note.

Edit Notes

On the Documentation tab, you can edit notes as necessary.

> Edit a note

1. Go to the Documentation tab of a record.
2. Click the double arrows beside a note and click **Edit**. The Edit note screen appears.
3. Make changes as necessary to the note type, date, title, author, or note content.
4. Click **Save**. You return to the Documentation tab.

Delete Notes

After you add notes to the Documentation tab, you can delete notes when necessary.

> Delete a note

1. Go to the Documentation tab of a record.
2. Click the double arrows beside a note and click **Delete**. A confirmation message appears.
3. Click **Yes**. You return to the Documentation tab, and the note no longer appears.

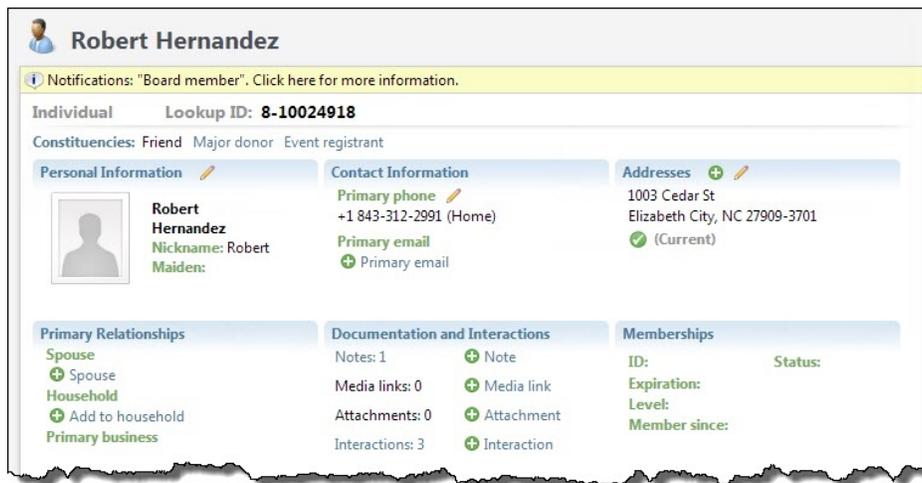
Notifications

Notifications allow you to share important information about a record or a group of records with users. You can determine whether all users should receive a notification or only a targeted group of users. For example, you notify all users to when they open the record of a board member.

Notifications are not available for every record type. They are available only for:

- Bank Account Adjustment records
- Bank Account Deposit records
- Bank Account Deposit Correction records
- Constituent records
- Event records
- Membership records
- Revenue records

Notifications appear on the information bar of a record.



Note: Notifications for constituents also appear in the Constituent Window of a revenue batch.

You can also set notifications to appear on a separate screen when users view a record. The notification screen appears the first time a user views a record during a session. If you leave the record and return within 60 minutes, the notification screen does not appear again. However, if you return after more than 60 minutes, the notification screen appears again.

You can create notifications for groups of records in *Administration*. You can also create notifications for a record from the Documentation tab of the record.

Add Notifications to Specific Records

On the Documentation tab, you can add a notification to a note on a record. You can select or create a note with the notification's message and add the notification to the note.

> Add a notification

1. Go to the Documentation tab of a record.
2. Select a note to use for the notification. The note's title and text appear as the notification.

Note: You must add a note to the record before you can add a notification.

3. Click **Add notification**. The Add notification screen appears.

Add notification

End date:

Display in notification window

Display in Daily Sales

Notification users

Displays for:

Selection:

Help

4. Select how long to display the notification, whether to display it in a notification window, and the users who view the notification.
5. Select how long to display the notification, whether to display it in a notification window and in Daily Sales, and the users who view the notification.

Note: When you select **Display in Daily Sales**, we recommend you avoid smart queries and complex query criteria for notifications because it could cause a degradation in performance.

6. Click **Save**. You return to the Documentation tab.

Edit Notifications for Specific Records

After you add a notification to a record, you can edit its properties on the Documentation tab. You can change how long to display the notification and who views it. To edit the notification's content, you edit the note associated with the notification.

> Edit a notification

1. Go to the Documentation tab of a record.
2. Click the double arrows beside the note with the notification and click **Edit notification**. The Edit notification screen appears.
3. Make changes as necessary to the notification, such as how long to display it and who views it.

Note: To edit the notification title or content, edit the note itself.

4. Click **Save**. You return to the Documentation tab.

Delete Notifications from Specific Records

On the Documentation tab, you can delete a notification when you no longer need it.

Note: For a constituent record, go to the Documentation and Interactions tab. Then click **Documentation**.

To remove a notification from a record, click the double arrows beside the note with the notification to remove and click **Delete notification**.

Open Attachment Files

After you add an attachment on the Documentation tab, you can open the attachment. To do this, click the double arrows beside the attachment and click **Open file**.

View Discounts Available for Merchandise

Whether merchandise is eligible for discounts depends on the merchandise department to which it belongs. If the **Discounts allowed on merchandise in this department** option is selected on the associated merchandise department record, the merchandise in that department can be discounted. For more information, see [Merchandise Departments on page 7](#).

If merchandise is eligible for discounts, you can determine on an individual basis when the merchandise is added whether an item can be discounted. For merchandise that have discounts, select the Discounts and Taxes tab on the merchandise record to view a list of all available discounts.

Note: If eligible, you can set up specific discounts that are applied to the merchandise during a sale. For information to help you set up merchandise discounts, see the Discounts and Promotions section of the *Tickets Guide*.

> View discounts available for a specific merchandise item

1. Access a merchandise record. To locate a specific record, from *Merchandise*, click **Merchandise search**. For more information, see [Search for Merchandise on page 15](#).
2. From the merchandise record, select the Discounts and Taxes tab. The **Discounts available** section displays the name, calculation type, and value of all discounts available for this item.

Discounts and Taxes

Discounts available for this item		
Name	Calculation type	Value
VIP deal	Amount off	2.00

Taxes applied to this item	
Name	Percent
Sales Tax	2.0000

Note: The **Discounts available** section appears on the Discounts and Taxes tab only if the merchandise is eligible to be discounted.

View Taxes Applied to Merchandise

If a merchandise item has a tax applied, it appears in the **Tax rate** field. For more information about how to configure merchandise taxes, refer to [Merchandise Taxes on page 7](#).

Candy bars

Name: Candy bars Department: Food and Drink Discounts allowed: Yes
 Description: Category: Tax rate: 6.00 %
 Status: Active Vendor: MJT Vendor

Inventory History Documentation Discounts

Inventory items (1) Print labels Filters More

SKU	Quantity	Item details	Retail price	Cost	Average cost	Margin
SKU010000118	0	Candy bars	\$0.00	\$0.00	\$0.00	N/A

Merchandise Reports



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From *Merchandise*, you can access and run reports that help you monitor sales numbers and inventory levels. With these reports, you can stay aware of merchandise sales trends and react appropriately. For example, you can reorder popular items to maintain stock levels or create discounts to spur sales of less popular items.

Inventory Report

With the Inventory Report, you can view all merchandise items that are currently in stock according to the sales data calculated by the system.

You can also use this report to track merchandise levels. If a specific merchandise item is running low, you know to reorder it before you sell out. If you notice an item is slow to sell and you have excess inventory, you can set up a discount for that item in an attempt to help sales.

To view this report, from *Merchandise*, click **Inventory report**. The Merchandise Inventory page appears. In the **Department** field, select whether to include inventory items from all or specific departments, or a selection of items based on a department query. In the Group by field, you can group the report results by groupings such as Category, Department, and Vendor. If you group the report by a specific grouping, you can also select the report type such as detailed or summary. To include inactive merchandise items in the report, select **Include inactive**. After you select the options, click **View Report**.

Merchandise Inventory

Department: All departments View Report

Include inactive

1 of 1 100% Find | Next Select a format Export

Inventory Report

Department: All departments

SKU	Name	Department	Category	Amount on hand	Vendor	Active
SKU010000001	Sea Turtles shirt - L,Blue	Apparel		20	Science Shop Inc.	Yes
SKU010000000	Sea Turtles shirt - S,Blue	Apparel		19	Science Shop Inc.	Yes
SKU010000002	Sea Turtles shirt - XL,Blue	Apparel		18	Science Shop Inc.	Yes
SKU010000003	Sea Turtles DVD	Media	Video	17	Science Shop Inc.	Yes

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The report displays information such as the item details, quantity, average cost, inventory value, and retail price.

Note: If you use multiple vendors for a merchandise item, it's important to know that this report displays the primary vendor, which may not be the vendor used for the last inventory shipment. Specifically, the report displays the primary vendor entered on the Change inventory screen of the merchandise item's record. To verify the primary vendor, on the Inventory tab, select the inventory item and click **Change Inventory**.

If the **Vendor** field is left blank on the Change inventory screen for a shipment, the report displays the detail vendor entered on the merchandise record. To verify the detail vendor, select **Edit merchandise** under **Tasks**. (This is also the vendor that displays at the top of the merchandise record.) When you reorder this item, first check its History tab to make sure you choose the correct vendor. See this [KB article](#) for more information.

Merchandise Sales Report

With the Merchandise Sales report you can view all merchandise sales revenue your organization has earned.

To view this report, from *Merchandise* or *Sales*, click **Merchandise sales**. The Merchandise Sales page appears. You can use the filters to set parameters such as department, sales method, and date. You can also group the report by category, department, and vendor. After you set the filters, click **View Report**.

Note: If you group by vendor, the inventory items are listed under the vendor from their last shipment. If there are no shipments for an item, the report uses the vendor recorded on the merchandise item.

Merchandise Sales

Department: All departments All departments
 Vendor: All vendors
 Sales method: All sales methods View report
 Group by: None
 Date: All Dates From: mm/dd/yyyy To: mm/dd/yyyy

1 of 1 100% Find | Next

Merchandise Sales Report

Department: All departments Start date: End date:
 Vendor: All vendors Sales method: All sales methods

Inventory item	SKU	Qty sold	Gross sales	Discounts	Refunds	Net sales	% of sales	Cost of sales	Margin	Profit	% of Profit
Art Museum Sweatshirt: Large	SKU010000028	2	\$59.85	\$29.94	\$9.97	\$19.94	0.9%	\$22.50	-12.8%	(\$2.56)	-0.2%
Art Museum Sweatshirt: Medium	SKU010000042	5	\$100.00	\$50.00	\$0.00	\$50.00	2.3%	\$50.00	0.0%	\$0.00	0.0%
Art Museum Sweatshirt: Small	SKU010000027	4	\$89.90	\$25.00	\$0.00	\$64.90	3.0%	\$51.46	20.7%	\$13.44	1.0%
Ballcap	SKU010000031	1	\$0.00	\$0.00	\$0.00	\$0.00	0.0%	\$0.00	0.0%	\$0.00	0.0%
Blue whale T-shirt: Large	SKU010000003	5	\$75.00	\$24.00	\$0.00	\$51.00	2.4%	\$25.00	51.0%	\$26.00	2.0%
Blue whale T-shirt: Medium	SKU010000002	12	\$180.00	\$6.77	\$0.00	\$173.23	8.1%	\$60.00	65.4%	\$113.23	8.7%
Blue whale T-shirt: Small	SKU010000001	27	\$465.00	\$63.00	\$60.00	\$342.00	16.0%	\$135.00	60.5%	\$207.00	15.9%
Dolphin hat	SKU010000005	11	\$187.00	\$9.39	\$0.00	\$177.61	8.3%	\$44.00	75.2%	\$133.61	10.3%
DW- Mickey mouse Tshirt: X-Small	SKU010000046	4	\$32.00	\$16.00	\$0.00	\$16.00	0.8%	\$13.33	16.7%	\$2.67	0.2%
Light Saber	SKU010000045	1	\$0.00	\$0.00	\$0.00	\$0.00	0.0%	\$0.00	0.0%	\$0.00	0.0%
Shark hat	SKU010000004	14	\$352.00	\$10.73	\$123.41	\$217.86	10.2%	\$56.00	74.3%	\$161.86	12.5%
Toy Solider: Confederate, 3.5", Armor	SKU010000011	10	\$200.00	\$4.00	\$0.00	\$196.00	9.2%	\$70.00	64.3%	\$126.00	9.7%
Toy Solider: Confederate, 3.5", Infantry	SKU010000010	10	\$150.00	\$4.00	\$0.00	\$146.00	6.8%	\$50.00	65.8%	\$96.00	7.4%
Toy Solider: Union, 3.5"	SKU010000009	10	\$160.00	\$4.00	\$0.00	\$156.00	7.7%	\$60.00	61.5%	\$96.00	7.4%

For each inventory item included, the report displays values for gross sales, discounts and refunds as well as calculated values for net sales, profit, and margin.

Merchandise Activity Report

The Merchandise Activity report displays information about the merchandise you have sold and have on hand during a given time period.

Merchandise Activity

Department: All departments All departments

Vendor:

Date: This Quarter From: 10/1/2011 To: 12/31/2011

Only show items with activity in this time period

1 of 1 100% Find | Next

Merchandise Activity Report

Department: Start date: 10/1/2011 End date: 12/31/2011

Vendor:

Only show items with activity in this time period: No

SKU	Name	Department	Category	Vendor	Quantity on hand	Quantity sold (10/1/2011 - 12/31/2011)
SKU01000003	Blue whale T-shirt - Large	Apparel	Shirt	Diamond Industries	14	1
SKU01000002	Blue whale T-shirt - Medium	Apparel	Shirt	Diamond Industries	28	5
SKU01000001	Blue whale T-shirt - Small	Apparel	Shirt	Diamond Industries	17	3
SKU01000000	Whale T-shirt	Apparel	Shirt	Diamond Industries	-5	0

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You can filter the report by merchandise department, vendor, and date. You can also filter the report to show only items with activity within a time period. To do this, select **Only show items with activity in this time period**.

You can view information such as the merchandise SKU, name, category, quantity on hand, and quantity sold. The **Quantity on hand** column displays the number of items available at the time the report is generated and the **Quantity sold** column displays the number of items sold during the selected time period. Quantity sold also includes refunds during the given time period. For example, if during the time period of 1/1/2012 to 1/7/2012 you sold 9 shirts, but 4 were returned you have a quantity sold of 5.

To view this report from *Merchandise*, under **Reports**, click **Merchandise activity**.

Physical Count Worksheet

The Physical Count Worksheet is a report used to manage the physical count of your inventory items. When you run this report, you can select a department and whether to include inactive inventory items and a column for quantity on-hand. Do not include the quantity on-hand if you want to ensure an unbiased count or a third-party is doing the physical count.

When you run the report the inventory items for your selected department appears. We recommend you print the worksheet to use while you count your inventory items.

After you finish your count, you can use the Merchandise Physical Count batch to enter your results. For information about the Merchandise Physical Count batch, see the Batch and Import guide.