

Heartland

Tag Customization Guide

Cash
Register
Express

Rev 04/2021

Table of Contents

Overview 1

Configuring Tags..... 1

 Enabling Tag Customization 1

 Creating Tags..... 3

 Assigning Tags to Items..... 5

 Adding Tagged Items to Choice Items 7

Adjusting Inventory..... 9

Overview

To support retail merchants wanting to better categorize and track store inventory items, CRE offers the option to create and assign tags to these items. This allows easy identification of an item's status with the use of related tags such as 'Fresh' or 'Stale'.

Please note:

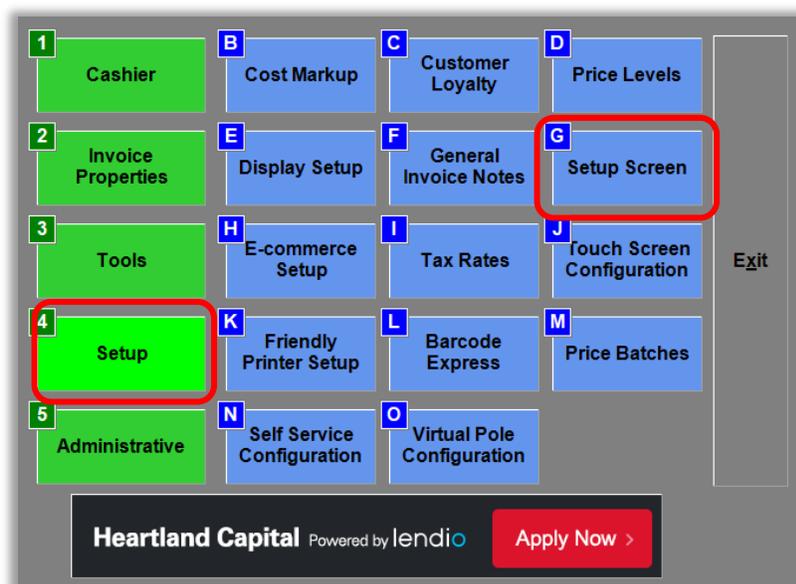
- ▶ At this time, CRE allows a maximum of two tags.
- ▶ Migration from one tagged status to another is unidirectional. For example, an item can migrate from 'Fresh' to 'Stale', but not vice versa.
- ▶ This feature is available in CRE version 14.1005 and later.

If you have questions regarding the processes described in this document, please contact Cash Register Express Support at 888.319.0521 or DAM@heartland.us.

Configuring Tags

Enabling Tag Customization

- 1 To enable Tag Customization, go to **Manager** or **Options**, and enter credentials if prompted.
- 2 Select **Setup**, then **Setup Screen**.



- From the **Inventory** tab, check the **Enable Item Tag Customization** box and select **Update**.

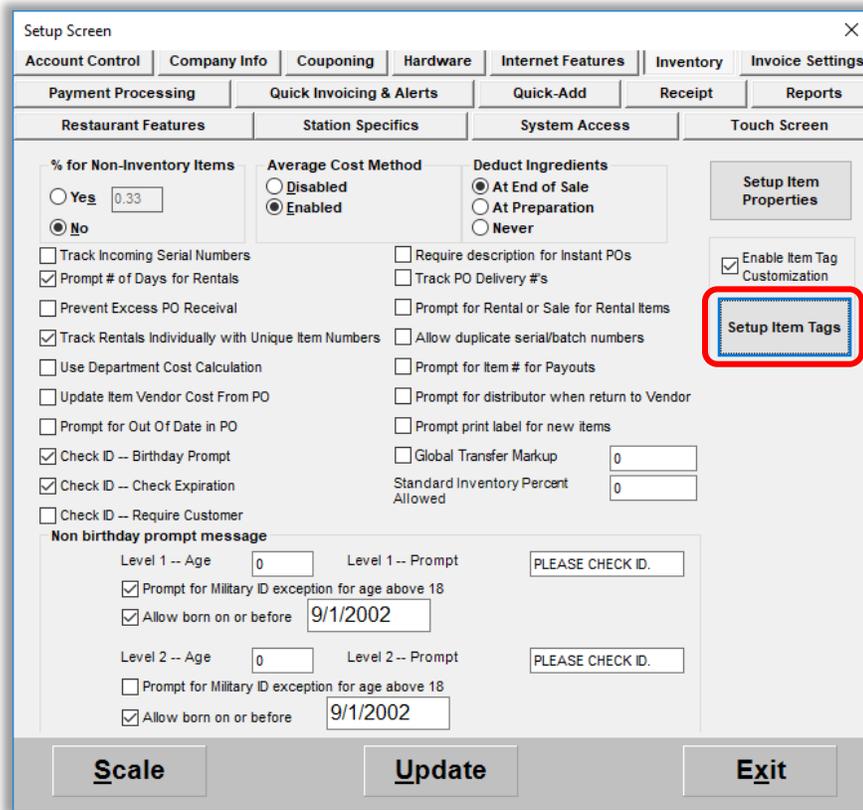
The screenshot shows the 'Setup Screen' window with the 'Inventory' tab selected. The 'Enable Item Tag Customization' checkbox is checked and highlighted with a red box. Other visible options include 'Setup Item Properties' and 'Setup Item Tags' buttons. The 'Update' button is located at the bottom center of the window.

- Go to the **Touch Screen** tab and verify that **Show Inventory Adjust / Receive Button on Retail Invoice Screen** box is enabled. If it is not, check the box and select **Update**.

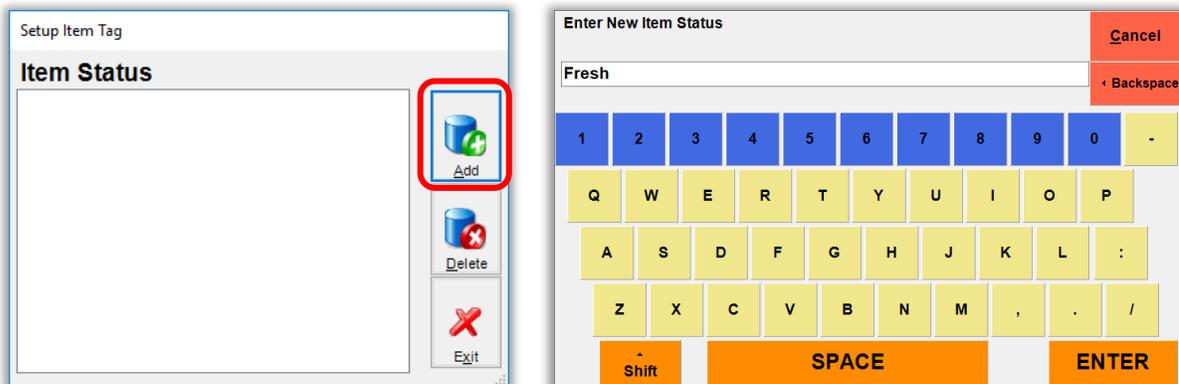
The screenshot shows the 'Setup Screen' window with the 'Touch Screen' tab selected. The 'Show Inventory Adjust / Receive Button on Retail Invoice Screen' checkbox is checked and highlighted with a red box. Other visible options include 'Hide Retail Invoice Quantity Box' and 'Show Restaurant Scan Box'. The 'Update' button is located at the bottom center of the window.

Creating Tags

- 1 From the **Inventory** tab of the **Setup Screen**, select **Set Up Item Tags**.

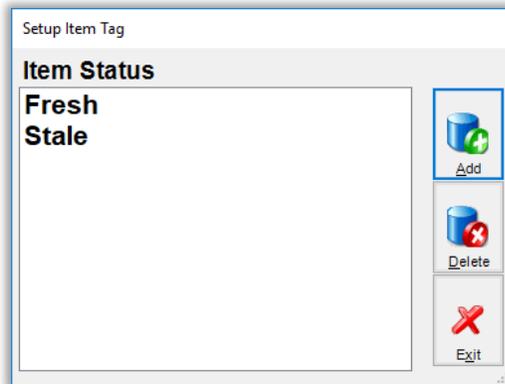


- 2 In the window that opens, select **Add** to add a new tag.



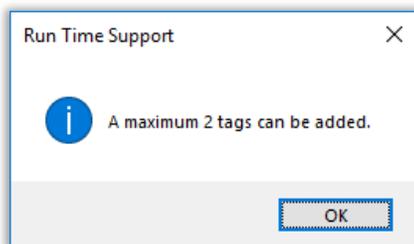
- 3 Enter the desired tag name using the on-screen keyboard and tap **Enter**.

- Repeat the process to add a second tag.



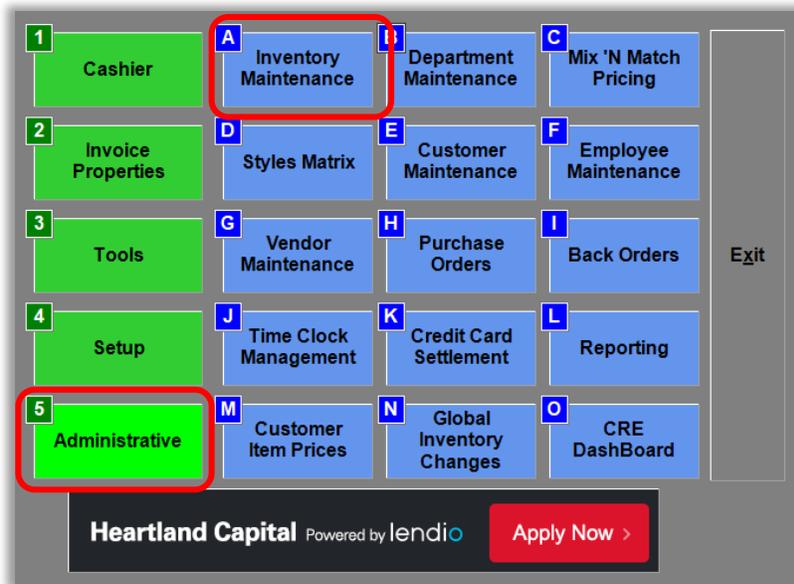
Please note:

- ▶ You must create tags in the order in which they will be attributed to items. In our example, using 'Fresh' and 'Stale', we created 'Fresh' first since items will start with this status before they eventually migrate to 'Stale'.
- ▶ We recommend assigning related names to the set of tags, such as 'Fresh' and 'Stale', 'Old' and 'New', or 'First' and 'Second'.
- ▶ If you delete a tag, all items using that tag (as explained in the [Assigning Tags](#) section below) will lose their association with the tag.
- ▶ If you attempt to add more than two tags, the maximum number allowed at this time, CRE will display a message to that effect.

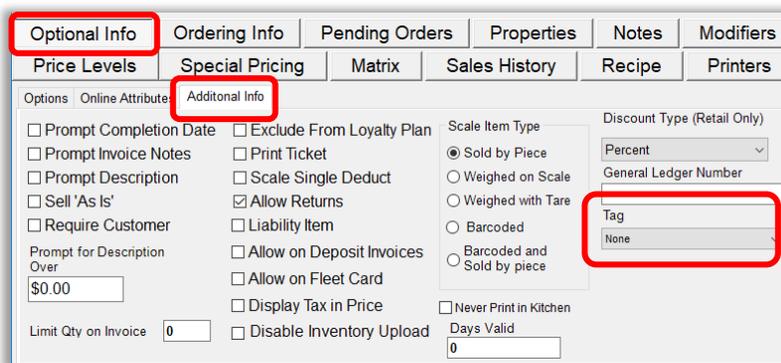


Assigning Tags to Items

- 1 Go to **Manager** or **Options**, and enter credentials if prompted.
- 2 Select **Administrative**, then **Inventory Maintenance**.



- 3 Select desired inventory item and go to the **Additional Info** subtab under **Optional Info**.



4 Choose the appropriate tag from the dropdown list and select **Save**.

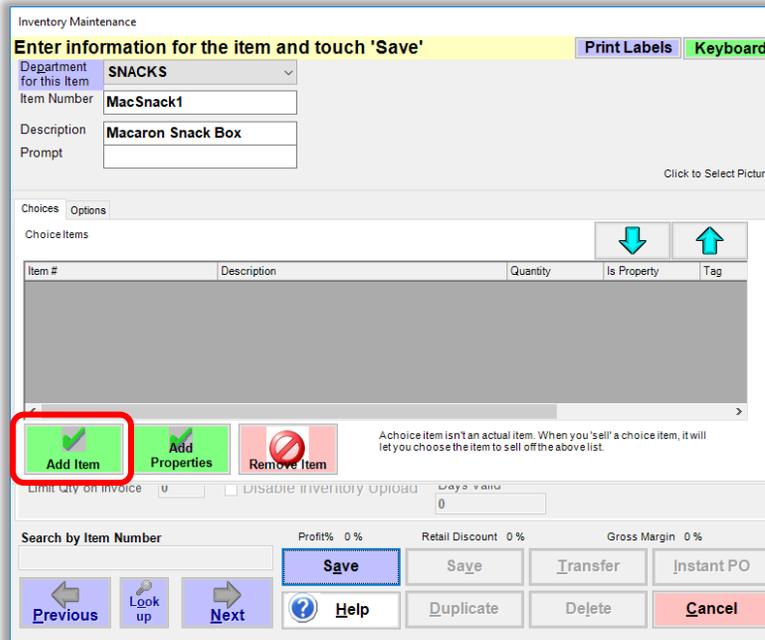
The image shows two screenshots of the 'Inventory Maintenance' software interface. Both screenshots show the 'Enter information for the item and touch 'Save'' screen. The top screenshot shows an item named 'Pistachio Macaron FR' with a stock of 24. The 'Tag' dropdown menu is open, and 'Fresh' is selected. The bottom screenshot shows an item named 'Pistachio Macaron ST' with a stock of 0. The 'Tag' dropdown menu is open, and 'Stale' is selected. Both screenshots show the 'Save' button highlighted in blue.

In these examples, we have assigned the **Fresh** tag to an item called **Pistachio Macaron FR** with a stock of 24, and the **Stale** tag to an item called **Pistachio Macaron ST** with a stock of zero.

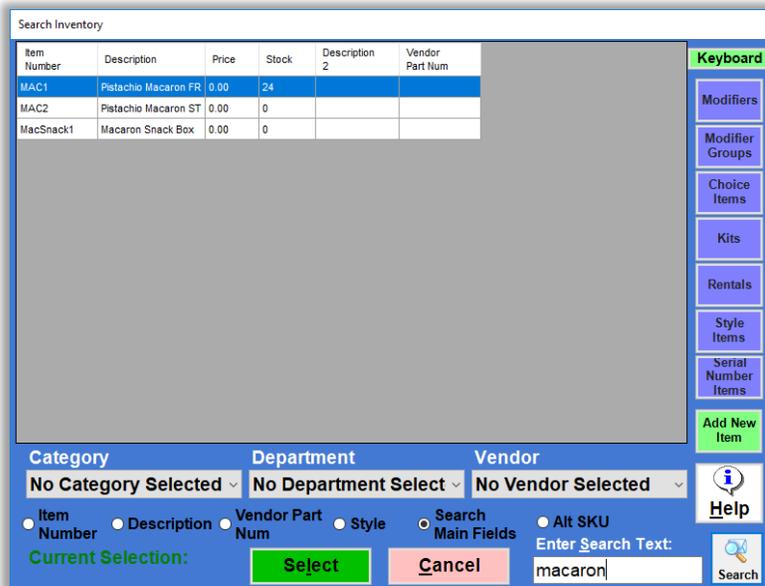
5 Repeat as necessary until all desired items are tagged.

Adding Tagged Items to Choice Items

- 1 To add tagged items to a choice item, first locate the choice item you wish to modify. We are using a choice item called **Macaron Snack Box** in this example.



- 2 Select **Add Item** to open the **Search Inventory** window where you can enter search criteria.



- 3 Highlight the item you wish to add from the filtered list and tap **Select**.

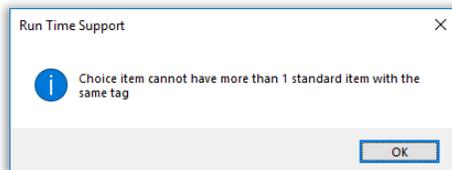
In our example, we are adding one item from each of our newly created tags, **Pistachio Macaron FR** and **Pistachio Macaron ST**.

The screenshot shows the 'Inventory Maintenance' window with the 'Choice item: Macaron Snack Box' selected. The 'Department for this Item' is set to 'SNACKS' and the 'Item Number' is 'MacSnack1'. The 'Description' is 'Macaron Snack Box'. Below this, there is a table of 'Choice Items' with columns for 'Item #', 'Description', 'Quantity', 'Is Property', and 'Tag'. The table contains two rows: 'MAC1' with 'Pistachio Macaron FR' and 'Fresh' tag, and 'MAC2' with 'Pistachio Macaron ST' and 'Stale' tag. At the bottom, there are buttons for 'Add Item', 'Add Properties', and 'Remove Item', along with a search bar and other navigation controls.

Item #	Description	Quantity	Is Property	Tag
MAC1	Pistachio Macaron FR	1	<input checked="" type="checkbox"/>	Fresh
MAC2	Pistachio Macaron ST	1	<input type="checkbox"/>	Stale

Please note:

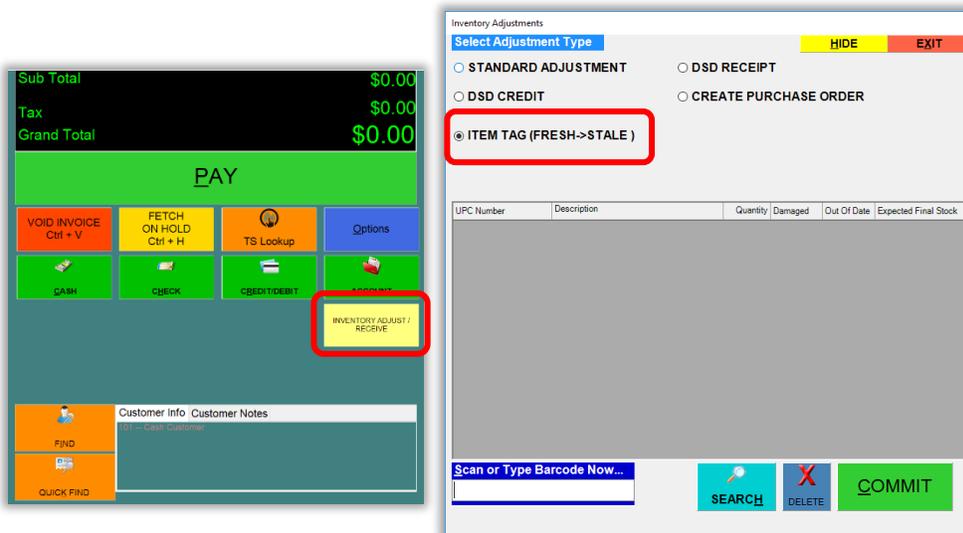
- ▶ You can only add ONE item from each of your tags to any given choice item. If you attempt to add more than one item with the same tag, CRE will display this message:



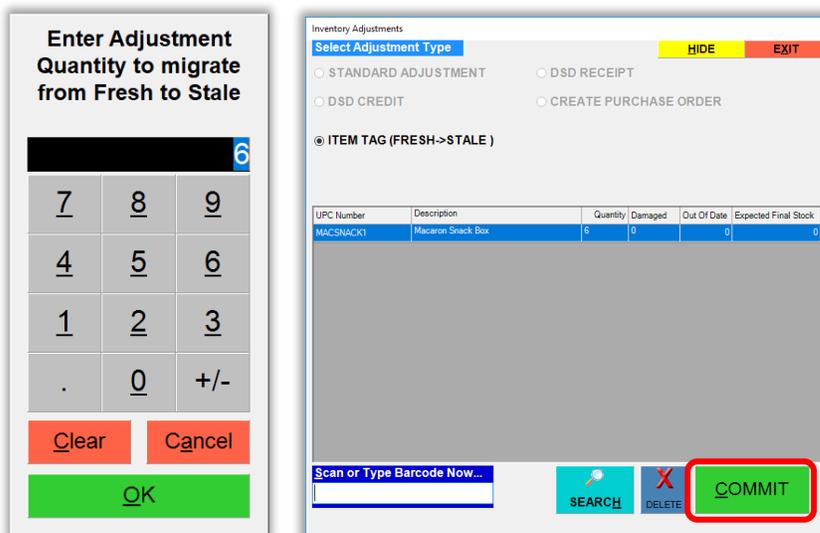
- ▶ There is no restriction on non-tagged standard items. Therefore, you can add any number of these to a choice item.

Adjusting Inventory

- 1 To transfer or migrate a quantity of items from one tagged status to the other, from the Invoice screen, tap the **Inventory Adjust / Receive** button.



- 2 Under **Select Adjustment Type**, select **Item Tag (Fresh → Stale)** and bring up your item by scanning or searching.
- 3 Enter the quantity to migrate and select **OK**. In this example, we are migrating 6.



- 4 Finally, select **Commit** to complete the migration.

- 5 CRE will display a confirmation.



Please note:

- ▶ As previously mentioned, items can migrate in only one direction. 'Fresh' items can become 'Stale', but 'Stale' items cannot become 'Fresh'.
- ▶ This migration is for use only with choice items containing tagged standard items, and will perform the migration on the tagged items. If you attempt this operation on a non-choice item, CRE will display this message:



Here are screenshots of the affected items with updated quantities reflected:

The image displays two screenshots of the 'Inventory Maintenance' software interface. Both screenshots show the details for an item in the 'SNACKS' department.

Top Screenshot: Item: Pistachio Macaron FR

- Department for this Item: SNACKS
- Item Number: MAC1
- Description: Pistachio Macaron FR
- Avg Cost: \$0.00000
- Price You Charge: \$0.00000
- Price with: \$0.00
- # In Stock: 18 (highlighted in a red box)
- Options: Bonus Points (0), # Barcodes (0), Commission (0.0%), Location (), Unit Size (0), Unit Type (), Modifier Item (), Exclude from Account Limit (), Check ID Before Selling (), Check ID #2 Before Selling (), Count This Item (checked), Alternate SKUs (), Tag Along Items (checked), Disable this Item (), Foodstampable (), Prompt Quantity (), Auto-Weigh (), Prompt Price (), Use Serial/Batch # (), Allow Buyback (), Special Permission (), Print on Receipt (checked).

Bottom Screenshot: Item: Pistachio Macaron ST

- Department for this Item: SNACKS
- Item Number: MAC2
- Description: Pistachio Macaron ST
- Avg Cost: \$0.00000
- Price You Charge: \$0.00000
- Price with: \$0.00
- # In Stock: 6 (highlighted in a red box)
- Options: Bonus Points (0), # Barcodes (0), Commission (0.0%), Location (), Unit Size (0), Unit Type (), Modifier Item (), Exclude from Account Limit (), Check ID Before Selling (), Check ID #2 Before Selling (), Count This Item (checked), Alternate SKUs (), Tag Along Items (checked), Disable this Item (), Foodstampable (), Prompt Quantity (), Auto-Weigh (), Prompt Price (), Use Serial/Batch # (), Allow Buyback (), Special Permission (), Print on Receipt (checked).