UNIFY POS SOFTWARE DATABASE CONSIDERATIONS

We recommend a top down design starting with departments.

- o Departments should be your most generic reporting structure. Examples may be CD's, Video Games, DVD's

- o UnifyPOS supports up to 99 departments using a 2 digit numeric numbering scheme.

- o We do **NOT** recommend using Vendors or Vendor Lines for departments – reporting on this can often be accomplished via other methods, and by doing so, you will reduce the reporting capabilities of your system.

- o While departments can be added, changed, or deleted, we recommend that you try and keep this at a minimum, due to historical reporting considerations. If you have department 1 as CD's now, and six months from now decide you want department 1 to be DVD's, your historical "CD sales" will look like "DVD sales" at that point.

Once you have your departments laid out, you should consider subdepartments. Subdepartments are not required, but do allow you to further "drill down" your site's sales.

- o UnifyPOS supports thousands of subdepartments using a 3 digit alpha-numeric numbering scheme.

- o A subdepartment **must** be linked back to a department. A department can have 0, 1, or multiple subdepartments linked to it, but each subdepartment can only be linked to **one department**. If you desire to have the same subdepartment (for example "**pants**") linked to multiple departments (for example "**women's clothing**" & "**men's clothing**") you would have to have two separate subdepartments (for example "**women's pants**" & "**men's pants**").

- o Some examples (based upon the department examples earlier) might be Rock, Pop, Country subdepartments for our CD department; or Comedy, Drama, & Action subdepartments for our DVD department.

- o **Ensure that your subdepartments names are unique**. In our above clothing example, you will notice "women's pants" and "men's pants" were used, and not simply "pants" twice. The rationale for this is that when running reports by subdepartment, you will see the subdepartment name--and if the names are not unique, you will have no way of telling which subdepartment you are actually choosing.

Next, we would move on to setting up our items.

- o To begin building inventory items, **we recommend organizing the items by department and subdepartment first, then entering them into the system--one department and one subdepartment at a time**. This breaks a large job into smaller tasks that are easier to complete, and speeds up the process of entering data by allowing you to copy "like items", and minimizing data entry.

- o UnifyPOS virtually supports an unlimited number of items, using a 12 digit alpha-numeric numbering scheme in conjunction with a "package code" (which we will cover below). Choose this number carefully, as it **CANNOT be changed** once the item is created. **If you need/want to change it, all you can do is delete the existing item and then recreate it. This will destroy all item history for this item, so it's not something to be done without careful consideration.**

- o Considerations for choosing your item number(s):
    - UnifyPOS can auto assign item numbers, as items are created. This works in a strictly ascending order (ie the first item number would be 1, and the second 2, etc).
    - It is **NOT** advised to use a barcode (UPC/EAN/etc) as your item number. Those numbers tend to change over time. UnifyPOS supports multiple barcodes per item, so if/when a barcode changes, you can simply add it to the items barcode list, and the transition will be seamless at the checkout.
    - It is also **NOT** advised to use a Vendor's "Product Code" as your item number. Those can also change over time and also does not take into account the ability to purchase an item for alternate vendors. UnifyPOS supports multiple vendor product codes per item.
    - The recommended method for assigning item numbers is to set aside **groups of numbers** and **assign items to the numbers in this range.** For example CD's may be item#'s 1 – 9,999; DVD's may be item#'s 10,000 – 9,999 and so on.

12.21.15

- As mentioned above, the second part of the way UnifyPOS identifies an item is via a "package code". The options for a package code are:
  - **Unit** – (code 1) which is the default selling size. Example: A can of soda.
  - **Pack** – (code 2) which is generally a larger selling size. Example: A 6 pack of soda.
  - **Other Pack** – (code 3) which is even larger. Example: A 12 pack of soda.
  - **Case** – (code 4) this is generally the largest size and is also our ordering size. Example: A 24 pack of soda.
  - **Rental** – (code 9) Rental items are used with the "Rental Pro" optional module.

- Once an item is created, the package code **also CANNOT be changed**.

- Anything, **other than** the item# and package code, **CAN** be changed at any point.

- The description field is 36 characters. This appears on the screen when sold, as well as on receipts and reports (may be truncated on some reports and/or when using single line PLU receipt printing). **It's strongly recommended that you adopt a consistent naming convention for items.** Unify has a strong search function at point of sale, so if good consistent use is made of the description field, it can make this a powerful tool for a sales clerk.

- If utilizing multiple package codes, these are the following considerations:
  - In order for ordering and inventory assignment to correctly function, **the items must have the same item number**. Using our soda example from above, all four sizes of soda would have to be numbered the same (say item 456). When viewing these items in item maintenance, you would see four entries for item #456, however each would have a different package code (1 through 4).
  - Unify will allocate inventory from the case package into the unit, pack, & other pack types as needed, providing each of these is correctly configured.
  - When doing inventory, all package codes in use will have to be inventoried.
  - Only the "ordering" size needs to have a vendor product code setup – however, if you wish for all sizes to appear on reports sorted by vendor, **you must setup vendor product codes for each package code**. Since vendor product codes must be unique, you would have to create new ones – generally appending a suffix to the original one.

As mentioned above, UnifyPOS supports multiple Barcodes and Vendor Product Codes per item.
- For Vendor Product Codes, Unify allows one code per vendor per item. Each code can be up to 12 digits (alphanumeric).

- As mentioned above, you can run many reports by vendor. The "vendor product code" is what assigns an item to a vendor. Therefore, even if you aren't using the Replenishment (aka Purchase Order) module, it's still suggested that you create vendor product codes--even if they are simply the item# re-used.

- For Barcodes, Unify supports various types – UPC-A, UPC-E, EAN-13, Code128c, Code39, etc. **However, it's recommended that you stick with UPC-A where possible**, since Unify can print price stickers and shelf labels that way.

- Unify supports the ability to "auto-create barcodes" for new items. If you have **any** items that do not have pre-printed barcodes, it is recommended that this option be enabled. It will allow you to print labels for the item(s) when desired. You should still enter the pre-printed barcode into the system--that way either one could be scanned at the point of sale.

- If you elect not to use the "auto-create barcodes", you can still create your own. If doing so, it's again recommended that you stick to UPC-A. The specifications for UPC-A are that it's 11 digits with a check digit. The standards of the format also define that "user created" barcodes should start with a **4** to ensure that there is no overlap with a commercial barcode. Therefore you should create 11 digit numbers starting with 4 – **but it's still far easier to use the "auto-create" option.**

THE INSTALLER HAS ADEQUATELY COVERED ALL OF THE ABOVE TOPICS AND THE SYSTEM HAS BEEN INSTALLED TO MY SATISFACTION

_____   _____
Business Name   DCRS Installer

_____   _____
Customer Signature   Date

ORIGINAL Copy to DCRS Solutions   *SECOND Copy to Customer*