

1. Product Catalog

Create, organize, find, and maintain the products your team sells.

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How to create a product

In this guide: Add a new product to your catalog so it can be stocked, searched, and sold.

Before you start

- Have the product name, selling price, cost, category, and tax information ready.
- Use a unique UPC/barcode or SKU whenever possible.
- Choose the correct product type: Itemized, Serialized, or Service.

Steps

1. Open **Inventory**, then select **Products**.
2. Select **New Product**.
3. Enter the product name and choose its category and department.
4. Enter the selling price, purchase cost, tax settings, and any description your team needs.
5. Add a UPC/barcode or SKU. Avoid reusing an identifier assigned to another product.
6. If you have multiple locations, review the location-specific price, cost, and availability.
7. Add a product image if desired, then select **Save**.

What happens next

The product appears in the Product List and can be found at the register by name, exact UPC/barcode, or exact SKU. Serialized products also require an available IMEI or serial record before they can be sold.

Tips

- Use Itemized for products tracked by quantity.
- Use Serialized for devices tracked one unit at a time by IMEI or serial number.
- Use Service for labor or other non-stock charges.

How to find and review a product

In this guide: Find a product and review its catalog, pricing, and inventory information.

Steps

1. Open **Inventory > Products**.
2. Use the search box to enter a product name, UPC/barcode, or SKU.
3. Use the available filters to narrow the list by category, product type, or status.
4. Select the product to open its profile.
5. Review product details, location stock, pricing, purchase information, and product history.

At the register

You can also search the main register by product name, exact UPC/barcode, exact SKU, or—when serialized inventory is enabled—an exact IMEI or serial number. Exact identifiers take priority over broad name results.

If you cannot find a product

- Confirm you are working in the correct location.
- Clear unnecessary filters and try the full identifier.
- Check whether the product has been removed from the current location.

How to edit, merge, or remove a product

In this guide: Correct product details, combine duplicates, or remove a product from a location.

Edit a product

1. Open **Inventory > Products** and select the product.
2. Select **Edit**.
3. Update the allowed details, then select **Save**.

Merge duplicate products

1. From the Product List, choose the duplicate products.
2. Select the merge action.
3. Review which product will remain and which information will move.
4. Confirm only after verifying the UPC, SKU, category, price, and stock.

Remove a product from a location

A product normally must have zero local stock before it can be removed. Resolve reserved quantities, pending transfers, and active serialized units first. Removing a product from one location does not necessarily delete it organization-wide.

Important: Never change a serialized category to another type while active IMEI or serial records still exist.

How to create and manage categories

In this guide: Organize products and assign the inventory behavior they should use.

Create a category

1. Open **Inventory > Categories**.
2. Select **New Category**.
3. Enter a clear category name.
4. Choose the correct type: **Itemized**, **Serialized**, or **Service**.
5. Add an image if useful, then save.

Edit, merge, or delete a category

Open the category list and choose the applicable action. Before merging, confirm the destination type is correct. A category cannot be deleted organization-wide while products are still assigned to it.

Choose the right type

- **Itemized:** Quantity-based stock such as cases, cables, parts, and supplies.
- **Serialized:** Individually tracked devices with an IMEI or serial number.
- **Service:** Labor and other non-stock charges.