

# Global Payments Terminal Plus

## Catalog upload guide

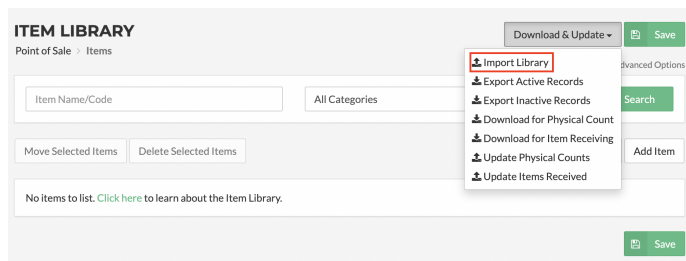
The following guide will walk you through the process of creating catalog items in your Global Payments Terminal Plus Point-Of-Sale (POS) Back Office. Please follow the steps in this guide to create your own product/service catalog.

### Step 1 – Create the inventory spreadsheet

Uploading your inventory on a spreadsheet is the fastest way to create items on your Global Payments Terminal Plus.

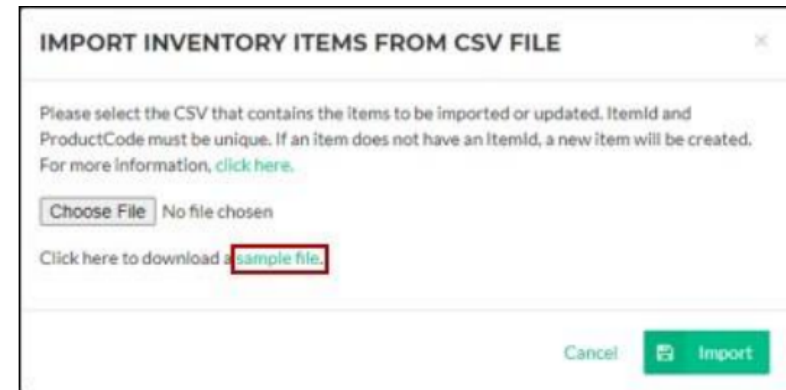
**NOTE:** The spreadsheet must be in comma-separated values (CSV) format.

1. Log on to [Global Payments POS Back Office](#) using the credentials in your welcome email.
2. Navigate to **Items > Item Library > Download & Update > Import Library**.



The **Import inventory items from CSV file** box opens.

3. Select the option to download a **sample file**.








4. Once you have downloaded the sample file, open it and complete the fields for each item:
  - **Item ID:** Leave this field blank for all items when uploading an inventory for the first time. The Global Payments POS software will generate a value when the spreadsheet is uploaded.
  - **Category (required):** The item's high-level category, such as **Drinks**.
  - **Subcategory (optional):** The item's subcategory within the category, such as **Hot Drinks** (within the **Drinks** category).

- **Group (optional):** The item's group within the subcategory, such as **Coffee Drinks** (within the **Hot Drinks** subcategory).
- **Colour (required):** The colour of the item's icon that will display on the point of sale.
- **Icon (required):** The four (4) digit code for the item's icon that will display on the terminal device. The format is followed by three (3) numbers or letters. Available icons are listed at: <https://help.vitalpos.com/how-to-import-items.htm#Available>

For example:

- **Recommended retail icon (handbag):** f016
- **Recommended restaurant icon (plate):** f000

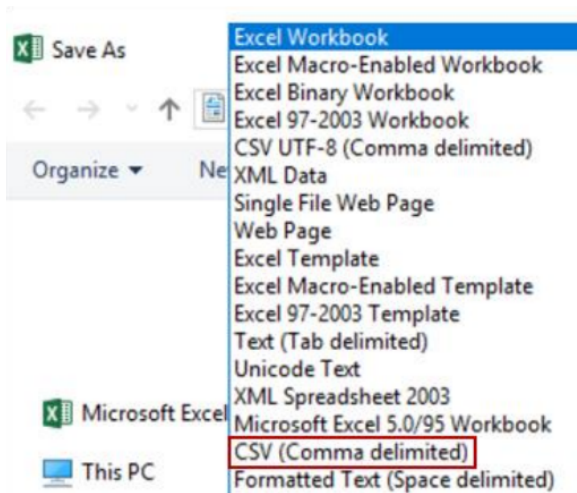
This partial screen image shows some typical icons in various colors:

ICON	ITEMS
	1
	0
	2
	0
	0

- **Icon type (required):** This six (6) digit code represents the icon's category, such as **Apparel and Accessories**. Icon types can be found at: <https://help.vitalpos.com/how-to-import-items.htm#Available>
- **Name (required):** The item's name, such as **Espresso**.
- **Open amount (required):** Enter **Yes** or **No** to indicate whether a price can be entered when in use. For example, you would enter **No** for an item sold by weight or an item that does not have a standard price, such as an antique item.
- **Price (required):** The price charged for an item to your customers.
- **Cost (optional):** The cost to you. The difference between the **Price** and the **Cost** is used to calculate the profit margin.
- **MSRP (optional):** The Manufacturer's Suggested Retail Price.
- **Is discountable (required):** Enter **Yes** or **No** to indicate whether discounts can be applied to this item. When the spreadsheet is exported, the system assigns the code 1 for **Yes** and 0 for **No**.
- **Is gift card (required):** Enter **Yes** or **No** to indicate whether the item itself is a gift card. Please note that this is NOT to indicate whether a gift card can be used to pay for this item.
- **Product code (optional):** The item's product SKU number. This code is typically used for barcode scanning.
- **Manufacturer (optional):** This can be used for reference when reordering inventory.

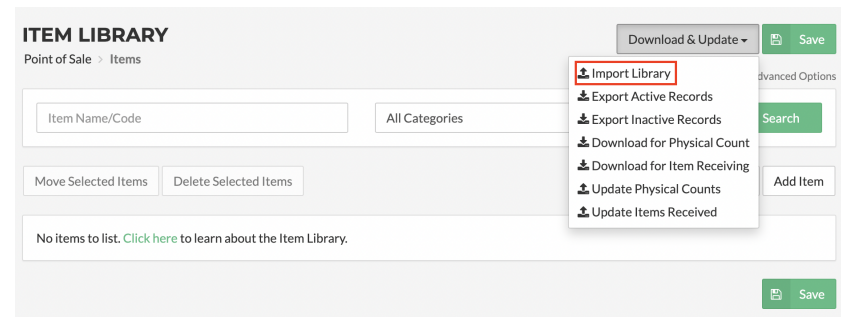
- **Model (optional):** This can be used for reference when reordering inventory.
- **Part number (optional):** This can be used for reference when reordering inventory.
- **Description (optional):** Details to describe the item.
- **Item alert message ID:** Leave this field blank for all items. The Global Payments POS software will generate a value when item alert messages are created in the Global Payments POS Back Office.

5. Save the spreadsheet as a CSV file.

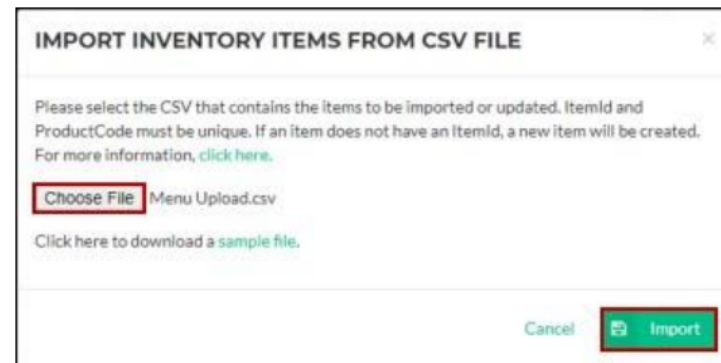


## Step 2 – Upload the inventory spreadsheet

1. Log on to [Global Payments POS Back Office](#) using the credentials in your welcome email.
2. Navigate to **Items > Item Library > Download & Update > Import Library.**



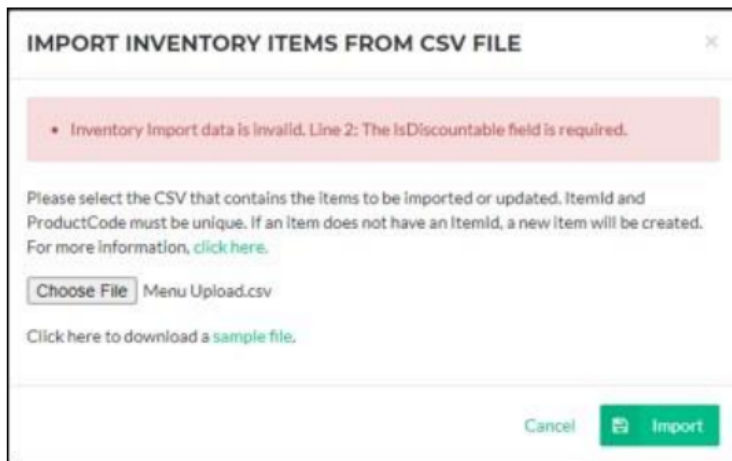
The **IMPORT INVENTORY ITEMS FROM CSV FILE** box opens.



3. Select **Choose File**, locate and select your inventory spreadsheet CSV file, and then select **Import**.

## Upload troubleshooting

If you see the message “Inventory import data is invalid”, it means the CSV file you uploaded contains invalid data. You’ll see a line on which the error was identified and the requirement for that field.



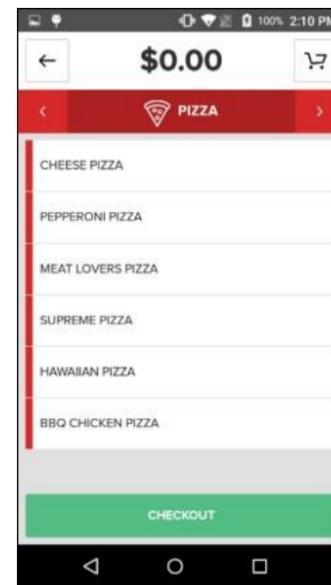
**Reason:** Missing or incorrect entries in the spreadsheet.

**Resolution:** Correct any errors in the spreadsheet, and then save and upload it again.

## Step 3 – Create the item screens

You must create item screens in the Global Payments POS Back Office for the uploaded items to appear during the transaction flow on the terminal device. An item screen displays items listed under a heading.

For example, you might create a **PIZZA** item screen that lists pizza items:



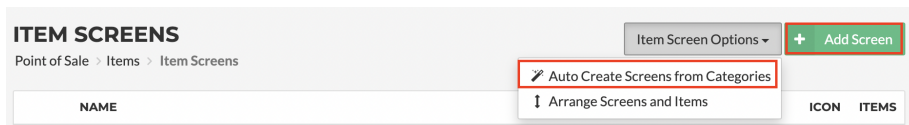
There are two (2) ways to create item screens:

1. **Add screen:** Use this feature to create item screens individually; for example, if you only have a small number of items in your inventory.

Navigation: **Items > Item Screens > Add Screen**

2. **Auto create screens from categories:** Use this feature if you have a large number of items in your inventory. It enables you to create item screens automatically based on the categories of items in your inventory.

Navigation: **Items > Item Screens > Item Screen Options > Auto Create Screens from Categories**

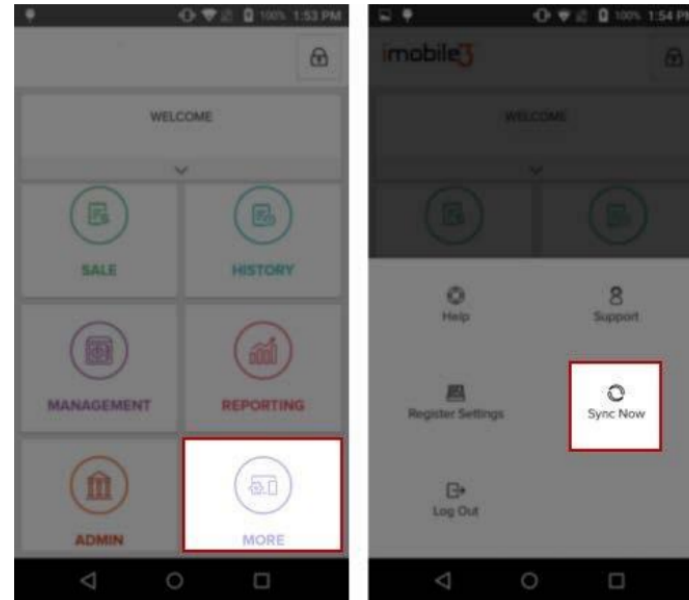


**NOTE:** The auto create function will screen for all available items without differentiating main and sub-categories.

### Step 4 – Synchronize the device

Once the inventory has been uploaded and the item screens have been created, you must synchronize your terminal device with the Global Payments POS Back Office to ensure that the new data appears on the device.

On the device welcome screen, select **MORE**, and then select **Sync Now**.



### Complete

Congratulations! You have successfully completed creating/updating your catalog items. All updates will be reflected on both your Terminal Plus device and the Global Payments POS Back Office.