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Category	Product
Course	Stock Records
Version	1.0
Client	Generic
Software	2.14.100

# Create a New Stock Record

Every product that you want to sell at POS and/or report on must have a stock record in SUREfire. This includes products, non-scans, and services (e.g. home delivery) that you want linked to a POS Quick Item button.

## Procedure to Create a New Stock Record in the BOS

### Hints and Tips

- ✓ Depending on your business, stock records may be created:
  - automatically when a supplier file is imported
  - manually at your Head Office
  - manually at the store.
- ✓ If your business is Head Office managed and you try to create new records at store-level, your settings will be over-riden the next time default profiling or deal promo calc processes are run (usually overnight), unless an override is set (at step 12).
- ✓ Contact the supplier if you don't know all the mandatory **yellow fields**.
- ✓ Use the following tips to create a stock record for a **coupon**, or a **Quick Item** button for giftware, non-scans, or fee etc:
  - **Stock Code**: set aside a range of numbers for this purpose.
  - **Case Qty, Units Per Pack** and **Pack Size**: set to [1].
  - **Warehouse Ind**: set to **Direct**.
  - **Unit Pricing**: set to **Exception**.
  - **Department tree**: select one relevant for reporting.
  - Create a generic **Supplier** account.
  - Set **Normal Cost** and **GST** as applicable; set a generic cost if GP reporting is important.
  - **EAN**: set aside a range of numbers to use (any length).
  - Set **Retail** to either [0.00] to prompt for price at POS, or to the value of the category/fee, & set **GST Retail** as applicable.
- ✓ You can't use a **stock code** that's already linked to this supplier on another record.

1.	From the BOS/HOS <b>Tools</b> menu, select <b>Stock Functions</b> , then <b>Stock</b> . <i>*Or click the <b>Stock Maintenance</b> icon.*</i>							
2.	On the <b>Stock</b> tab, click							
3.	<table border="1" style="width: 100%;"> <thead> <tr> <th>To:</th> <th>then:</th> </tr> </thead> <tbody> <tr> <td>create the record from scratch</td> <td>go to step 5.</td> </tr> <tr> <td>copy an existing 'like' product (<i>this saves time on data entry</i>)</td> <td>                     select the <b>Base new stock item on an existing stock item</b> check box.                      In the <b>Enter EAN Number to use as base</b> field, type or search for the 'like' product.  <i>*All the fields are populated, except <b>Stock Code</b> &amp; <b>EAN</b>.*</i>                      Go to step 5                      Edit the fields as required.                 </td> </tr> </tbody> </table>	To:	then:	create the record from scratch	go to step 5.	copy an existing 'like' product ( <i>this saves time on data entry</i> )	select the <b>Base new stock item on an existing stock item</b> check box. In the <b>Enter EAN Number to use as base</b> field, type or search for the 'like' product. <i>*All the fields are populated, except <b>Stock Code</b> &amp; <b>EAN</b>.*</i> Go to step 5 Edit the fields as required.	
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4.	In the <b>Stock Code</b> field, type the suppliers' unique ordering code for the product. <i>*Usually 6 characters, maximum 12 characters.*</i> <i>*It can be characters and/or digits.*</i>							

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**Hints and Tips**

- ✓ **Description** text displays on the POS, receipt, and tickets.
- ✓ **Short Description** might be configured to print on tickets or display at POS in your business.
- ✓ Check your legal requirement to display the price of an item as a standard **unit of measurement**.
  - Refer to [www.accc.gov.au](http://www.accc.gov.au) [Unit Pricing: a Guide for Grocery Retailers](#).
- ✓ The **On Hold** check box may be configured to auto-selected when a new product is imported from the supplier file.
- ✓ The **Stocked** check box will automatically be set in the BOS when the product is received, invoiced, or sold at POS.
  - Labels for scheduled changes are usually configured to only print for stocked products.
- ✓ **Permanent Override** determines whether store values override data imported from a Head Office or a supplier file (Retail/cost will always be imported if it's currently [o]):
  - **Not Overridden:** apply all changes imported; usually set for non-HOS driven stores.
  - If one of the **Override** options is selected, all details are imported except for the selected override; e.g. **Override margin** will keep the existing margin, & apply all other changes (usually set for HOS driven stores)
- ✓ Refer to the [TECH-4b Configure Department Hierarchies Fact Sheet](#) if there isn't an appropriate department tree for this product.



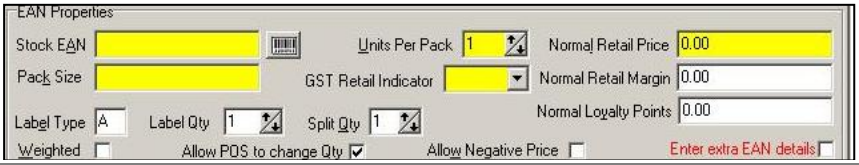


<p>5. In the <b>Description</b> field, type a full summary of the product. <i>*Maximum 30 characters.*</i></p>					
<p>6. In the <b>Short Description</b> field, type the text that might be used on some of your tickets. <i>*Maximum 12 characters.*</i></p>					
<p>7. In the <b>Size Desc</b> field, type the <u>individual</u> size of one selling unit of the product. <i>*E.g. weight, fluid measurement, quantity per selling pack; e.g. 50g, 50ml, 2LT, P/KG, EA, KG, 6PK.*</i></p>					
<p>8. In the <b>Warehouse</b> field, select the source of this product. <i>*E.g. Warehouse, Direct, [Z] slower seller/delivery.*</i></p>					
<table border="1"> <tr> <td data-bbox="550 712 837 1003"> <p>9. <b>If unit pricing</b> applies to your business/this product</p> </td> <td data-bbox="837 712 1189 1003"> <p><b>then:</b> in the <b>Size</b> field, type the measure of an individual unit of the product. <i>*E.g. 0.5 (for 500g), 1 (1L).*</i></p> <p>In the <b>Measure</b> field, select the applicable standard unit of measure.</p> </td> </tr> <tr> <td data-bbox="550 1003 837 1081"> <p>doesn't apply</p> </td> <td data-bbox="837 1003 1189 1081"> <p>select the <b>Exception</b> check box.</p> </td> </tr> </table>	<p>9. <b>If unit pricing</b> applies to your business/this product</p>	<p><b>then:</b> in the <b>Size</b> field, type the measure of an individual unit of the product. <i>*E.g. 0.5 (for 500g), 1 (1L).*</i></p> <p>In the <b>Measure</b> field, select the applicable standard unit of measure.</p>	<p>doesn't apply</p>	<p>select the <b>Exception</b> check box.</p>	
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<p>Back Office (BOS) user</p>	<p>select the <b>Stocked</b> check box to indicate the product will be ranged in the store.</p>				
<p>11. If a BOS user, select the <b>Perpetual Stock</b> check box if you'll manage SOH (inventory).</p>					
<p>12. In the <b>Permanent Override</b> field, select the applicable option. <i>*See Hints and Tips.*</i></p>					
<p>13. In the Department section, select the <b>Department, Sub Department, and Range</b> that this product will be reported against. <i>*Sub Range is assigned on the Enter Extra Supplier Details screen.*</i></p>					
<p>14. In the <b>Supplier</b> field, type, or search for, the code for the supplier you'll order from. <i>*Select the Enter Extra Supplier Details check box if there are multiple suppliers; when you click Next you'll enter their details &amp; select the default one.*</i></p>					
<p>Supplier Properties: Supplier [ ] Normal Cost 0.00 Case Qty 1 GST Cost [ ]</p>					



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**Hints and Tips**

- ✓ Sample EAN parameters:
  - Coke singles, slab, or carton:
    - **Size Description:** 375ml
    - **Case Qty:** 24
    - **Pack Size:** single EAN [1pk], slab EAN [6pk], carton EAN [24pk]
    - **Units Per Pack:** 1, 6, 24
  - Toilet rolls 4 pack
    - **Size Description:** 4pk
    - **Case Qty:** 6
    - **Pack Size:** 4pk
    - **Units Per Pack:** 1
- ✓ **Pre-pack/random weight EANs:**
  - E.g. meat packs delivered with price embedded in barcode, or deli ham sold by weight.
  - Format: prefix (e.g. 020, 22, 29), plu, then pad check digits and the price with 6 or 7 [0]'s depending on if 4 or 5 digit price format (total 13 digits). e.g. 2987636017991 is entered as 29876230000000, and 0208748017990 is entered as 02087480000000
  - Prefixes must be set up in POS Config and in BOS properties.
  - Set **price** to the per kilo price.
  - Select the **weighted** check box if it's a kilo product.
- ✓ Optional fields:
  - **Label Type:** when you print shelf tickets, they may filter to only print products with a matching label type.  
[A] = shelf ticket  
[Q] = quaint ticket (spices etc)
  - **Weighted:** select if inventory and reporting will be in kilos; usually if you order it in kilos. Prompts the operator to put the product on the deli scales or on the POS scales if it's not a price embedded barcode.
  - **Label Qty:** the default number of tickets that'll print during an in-store ticket request.
  - **Allow Negative Price:** to set a negative retail price; disables price change function at POS.
  - **Normal Loyalty Points:** the points earned for the product; based on POS Config settings.
  - **Allow POS to Change Qty** and **Split Qty:** no longer used.

<p>15. If a Store user, in the <b>Normal Cost</b> field, type the <u>case</u> cost (GST inclusive). <i>*HOS users set this in the HOS Pricing function.*</i></p>	
<p>16. In the <b>Case Qty</b> field, type the number of selling units that this supplier will deliver when you order [1] case.</p>	
<p>17. In the <b>GST Cost Indicator</b> field, select the GST rate that applies to the product at cost. <i>* Select a zero GST if no GST applies.*</i></p>	
<p>18. In the <b>Stock EAN</b> field, type the barcode of the product. <i>*EAN validation  isn't required.*</i> <i>*If a pre-pack, see Hints and Tips.*</i> <i>*Select the <b>Add Extra EAN details</b> check box if there are multiple EANs or it's a TAFMO card; when you click <b>Next</b> you'll enter these details.*</i></p>	
<p>19. In the <b>Pack Size</b> field, type the quantity that this EAN is sold in; will display on shelf tickets. <i>*E.g. P/KG, 2KG, 150g, 1L, 6PK.*</i></p>	
<p>20. In the <b>Units Per Pack</b> field, select the number of units that inventory will be reduced by when this EAN is sold. <i>*E.g. beer slab is [6] units, toilet rolls is [1] unit.*</i></p>	
<p>21. In the <b>GST Retail Indicator</b> field, select the GST rate that'll be charged to the customer. <i>* Select a zero GST if no GST applies.*</i></p>	
<p>22. In the <b>Normal Retail Price</b> field, type the regular sell price of this EAN. <i>*Set to \$0.00 to prompt for price at POS.*</i> <i>*HOS users set this in the HOS Pricing function.*</i></p>	
<p>23. Complete the following fields as required:</p> <ul style="list-style-type: none"> <li>• <b>Label Type</b> (defaults to A)</li> <li>• <b>Weighted</b></li> <li>• <b>Label Qty</b> (defaults to 1)</li> <li>• <b>Allow Negative Price</b></li> <li>• <b>Normal Retail Margin</b> (defaults to Retail price - ([Per Unit Cost] / Retail price). <i>*HOS users set margin in the HOS Pricing function.*</i></li> </ul>	
<p>24. Click .</p>	



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**Hints and Tips**

- ✓ **Extra Stock Details screen:**
  - **Extended Description 1 & 2:** prints on promotion tickets.
  - **Extended Description 3:** the shelf location of the product.
  - **VAS: & Tax Code:** for taxes other than GST; e.g. 'Tafmo Simple' for gift/recharge cards **Tafmo Complex** is selected if registration details are entered at POS, e.g. fishing licences), or 'wet' tax for liquor.
  - **Host Comments:** this field is auto-populated by the Host file. e.g. Imported from host.
  - **Sub Range:** select if the product is in a sub range.
  - **Expense and GL Account:** select this & the applicable GL Account code if this is an expense item e.g. carrier bags. Note: SUREfire doesn't support any General Ledger.
  - **Stock Levels Min and Max:** not used.
  
- ✓ **Extra Supplier Records screen:**
  - **Purchase Breaks:** each supplier can provide up to four percentage-off or new cost (incl. GST) discounts for purchasing in bulk (cases).
  - **Description:** not used.
  - **Min Order Qty:** the minimum number of units that must be ordered.
  - **Units:** not used.
  - **Manufacturer Code:** the code assigned by the manufacturer.
  - **Manufacturer Description:** name of the manufacturer.
  
- ✓ **Extra EAN Records screen:**

This screen is usually used if:

  - the product will be sold in different UPP multiples e.g. a pack & a carton of cigarettes, or a single can or slab of coke
  - there are multiple EANs with the same UPP but with different packaging.

All stock movements against the product will adjust the SOH of the combined product.

<p>25.</p>	<p><b>If you selected: then:</b></p> <p>no extra detail go to step 26.</p> <p>the <b>Enter Extra Stock Details</b> check box at step 13 complete the optional fields as required. <i>*See Hints and Tips.*</i> Click <b>Next</b>.</p> <p>the <b>Enter Extra Supplier Details</b> check box at step 14 complete any optional fields, and then click <b>Save Supplier</b>. <u>To add another supplier:</u></p> <ul style="list-style-type: none"> <li>• click <b>Add Supplier</b>.</li> <li>• Enter their details.</li> <li>• Click <b>Save Supplier</b>.</li> <li>• Select the <b>Default</b> check box for the main supplier.</li> <li>• Click <b>Next</b> when finished.</li> </ul> <p>the <b>Enter Extra EAN Details</b> check box at step 18 click <b>Add EAN</b>. Complete the details the same way as the first EAN. Click <b>Save EAN</b>. (to add an EAN) Click <b>Next</b> when finished.</p>	
<p>26.</p>	<p>Select the required action:</p> <p><b>If the details: then:</b></p> <p>are incorrect click <b>Previous</b> and fix them.</p> <p>are correct click <b>Finish</b>. <i>If a Head Office user, click <b>HOS Pricing</b> to set pricing.</i> Click <b>Continue</b> to create another record, or <b>Close</b> display the new record.</p>	
<p>27.</p>	<p>If required, complete the <b>Scales</b> tab. <i>*Refer to <a href="#">PRO-1d Maintain Scales Data Fact Sheet</a>.*</i></p>	
<p>28.</p>	<p>If required, select the following option/s on the <b>EAN</b> tab for a selected EAN:</p> <ul style="list-style-type: none"> <li>• <b>Prompt for Qty</b> check box</li> <li>• <b>Non-Saleable</b> check box</li> <li>• <b>Tare weight</b> (for packaged products weighed at POS; e.g. mushrooms).</li> </ul>	
<p>29.</p>	<p><b>If: then:</b></p> <p>a head office (HOS) user the record is sent to stores when <b>HOS Export</b> is run.</p> <p>a store (BOS) user click <b>Update</b>, OR run <b>Price Update</b> (via BOS folder) to apply several records. Click <b>Send to Scales</b> (via BOS folder) if a deli-scale product. <i>*OR let the automatic update apply changes overnight.*</i></p> <p><i>*A ticket will be auto generated when the store receipt or invoice the stock for the first time.*</i></p>	