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Category	Product
Course	Stock Records
Version	1.0
Client	Generic
Software	2.15.5.3

# Stock Screen / Product Enquiry

Every product in SUREfire has a stock record.

## Procedure to View a Stock Record

### Hints and Tips

- ✓ If you don't have access to the **Stock** screen, refer to the [PRO-1j Stock Enquiry Read Only Fact Sheet](#).
- ✓ A stock record tells you a product's:
  - stock code/s
  - barcode/s
  - retail and cost price
  - deals/rebates, & promotions
  - department hierarchy.
- ✓ Note: Head Office users use the **HOS Pricing** function to manage pricing, deals, and promotions.
- ✓ **Summary Information Section:**
  - Values are for all EANs against the record, & GST inclusive.
  - Doesn't display on the HOS.
  - **AWC** is the average weighted cost; used for ordering, and updated off the invoice.
  - **Current supplier:** the default supplier.
  - **Stock On Hand:** the quantity of units that the system believes is in the store; displays N/A if the **Perpetual Stock** check box isn't selected.
  - **Sales** for the current week are in dollars, cost, & profit value.

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.	<b>If:</b> you know the stock code	<b>then:</b> in the <b>Stock Code</b> field, type the stock code. Press <b>Enter</b> or <b>Tab</b> .
	you know the item barcode	in the <b>EAN Code</b> field, type or scan the EAN barcode. Press <b>Enter</b> or <b>Tab</b> .
	you need to search for the product	next to the <b>EAN Code</b> field, click . Enter search criteria. <i>*Select <b>Contains</b> to perform a multiple word search; it looks for the words anywhere in the field.*</i> <i>Select the <b>Stocked &amp; Logically Deleted</b> filters as required.</i> <i>*The search starts automatically, &amp; returns one EAN per UPP; select the <b>All EANs</b> check box to return all EANs for this item.*</i> <i>*Results display for the default supplier, unless a supplier is set.*</i> <i>*Optionally select <b>Advanced Search</b> for extra search options.*</i> Click the required product, then click <b>Select</b> (or double-click the row).
<i>*The item details are displayed.*</i>		

**COKE 2LT : Stock**

Stock Code: 884885    COKE 2LT    EAN Code: 0000000088488

Stock | EAN | Supplier | Deal | Promotions | Schedule Changes | Sales History | Picture | Points | Loyalty | Scales

Short Description: 8 COKE 2LT    Status:     Linked     Store Ranged     Grade

Stock Description: COKE 2LT    Perpetual Stock     Stocked     Sales Restriction

Case Qty: 8    Size Desc: 2LT    Permanent Override: Not Overridden

Warehouse Ind: D: Direct

Unit Pricing: Exemption     Size: 2    Department: A: GROCERY

Measure: per litre (l : 1)    Sub Department: A28 - DRINKS

Range: 208 - SOFT DRINKS MIXERS

Sub Range: (none)    Product Group:

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**Summary Information**

Current Sell Price	2.55	Case Quantity	8	Sales for week	42.95
Current Margin	15,801.7%	Current Cost Per Pack	2.1488	Cost	36.53
Current Unit Price	\$1.28 per litre	Current Cost Per Case	17.1900	Profit	6.42
Current Supplier	COCA CO	AWC	2.1488	Stock On Hand	23.00
		Current Loyalty Points	2.55	GST Retail Perc	10%

Stocked

	There are scheduled changes that will be effective on the set date/time after system processes have run.
	A cost deal is active; only applies if less than the normal cost.
	A promotion is active; only applies if it's less than normal retail & <b>Price Update</b> has run.
	The product can't be ordered or sold.
<input checked="" type="checkbox"/> Stocked	The product is ranged in your store.

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**Hints and Tips**

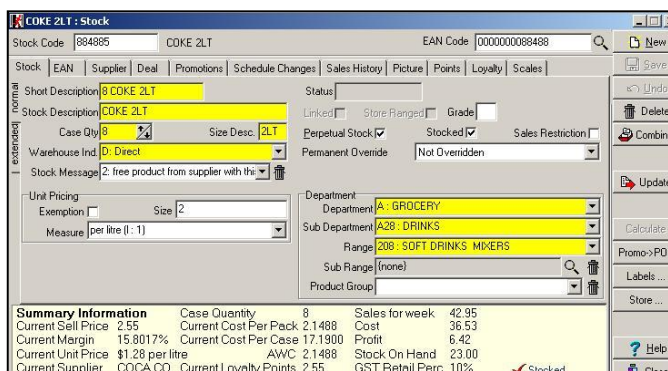
- ✓ **Logically deleted supplier:**
  - Can't be ordered from this supplier anymore.
  - Deletes imported by HOST are set to logically deleted, and triggers a deleted ticket.
  
- ✓ **Physically deleted:**
  - Product can't be ordered or sold anymore.
  - A scheduled task runs nightly to remove physical deletes.
  
- ✓ **Function buttons, if permitted:**

	Create a new record/event, depending on the tab you click <b>New</b> on.
	Save your changes.
	Undo all changes since you last saved.
	Mark the stock record, an EAN or a supplier for physical deletion, based on the tab performed.
	Un-mark the product/EAN/supplier for physical deletion.
	Link two stock records that should be a single record.
	Move a single EAN to another stock code.
	Move multiple EANs to another stock code.
	send the 'current' price details to POS (once File Transfer & POS Import have run).
	Not used anymore.
	Send the active promotions for every product to POS; usually only used by Support.
	Request an automatically generated ticket; print it from the <b>Labels Wizard</b> function.
	Not used anymore; use the <b>Tools</b> menu -> <b>Stock Functions</b> -> <b>SOH Enquiry</b> function.

3.	<b>To:</b>	<b>Refer to the:</b>
	check the default supplier for the product	<b>Stock</b> tab -> <b>Summary Information</b> -> <b>Current Supplier</b> field (description) OR <b>Supplier</b> tab -> <b>Default?</b> field is 'true'.
	check if changes made by the store will be overridden by HOST import	<b>Stock</b> tab -> <b>Permanent Override</b> field. Refer to page 3 for a description of each option.
	view a <b>label location</b> saved against the product	<b>Stock</b> tab -> <b>Extended</b> tab; the location is stored in the <b>Ext. Desc 3</b> field. <i>*Refer to the <a href="#">PRO-5c Set Label Locations (Mobile) Fact Sheet.</a>*</i>
	check if there is a <b>minimum order quantity</b>	<b>Supplier</b> tab -> <b>Min Order Qty</b> field.
	check when a <b>stock record</b> was <b>physically deleted</b>	<b>Stock</b> tab. <i>*The date it was deleted is displayed.*</i> 
	check when an <b>EAN</b> or a <b>Supplier</b> was <b>physically deleted</b>	<b>EAN /Supplier</b> tab. If there are multiple EANs/Suppliers listed, select the applicable one. <i>*The date it was deleted is displayed.*</i> 
	check when a <b>supplier</b> was <b>logically deleted</b>	<b>Supplier</b> tab. If there are multiple suppliers listed, select the supplier. <i>*The date they were deleted is displayed.*</i> 
	view the <b>deal</b> history (excludes rebates created at Head Office)	<b>Deal</b> tab. <i>*Refer to the <a href="#">PRO-2c In-store Deals and Rebates Fact Sheet.</a>*</i>
	view the <b>promotion</b> history (excludes discounts)	<b>Promotions</b> tab. <i>* Refer to the <a href="#">PRO-2e In-store Price Promotions Fact Sheet.</a>*</i>
	view a history of <b>scheduled changes</b> made (excludes deals, discounts and promotions)	<b>Schedule Changes</b> tab. <i>*Refer to the <a href="#">PRO-2b In-store Schedule Changes Fact Sheet.</a>*</i>
	view a weekly history of <b>sales</b> for the EAN	<b>Sales History</b> tab. <i>*Refer to page 8 for field definitions.*</i>
	view the <b>loyalty points promotion</b> history	<b>Points</b> tab. <i>*Refer to the <a href="#">PRO-2f In-Store Points Promotion Fact Sheet.</a>*</i>
check active <b>loyalty pricing</b>	<b>Loyalty</b> tab. <i>*Refer to page 9 for field definitions.*</i>	
view <b>scales data</b> for weighted products	<b>Scales</b> tab. Refer to the <a href="#">PRO-1d Maintain Scales Data Fact Sheet.</a> *	
4. Click <b>Close</b> when finished.		

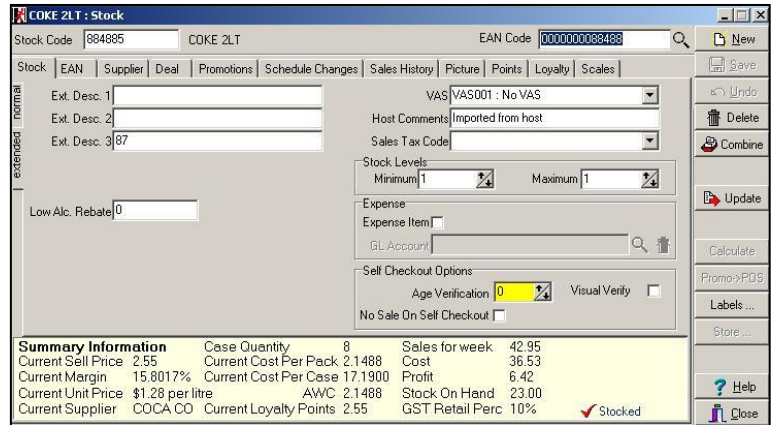


## Stock Tab – Normal



Field	Description
<b>Short Description</b>	The text that may display on some of your tickets.
<b>Stock Description</b>	The text that displays on the POS, receipt, and tickets.
<b>Case Qty</b>	The number of units in each case ordered from the default supplier. If there are multiple suppliers for this product, it's recommended that you use the <b>Supplier</b> tab.
<b>Size Desc.</b>	The <u>individual</u> size of the product, or the quantity contained within one selling unit of the product. <i>*E.g. weight, fluid measurement, quantity per selling pack; 50g, 50ml, 2LT, EA, 6PK.*</i>
<b>Warehouse Ind.</b>	The source of the product. <i>*E.g. Warehouse, Direct.*</i>
<b>Stock Message</b>	A message that displays at POS for the operator; e.g. product recall, restricted sale products. <i>*Refer to the <a href="#">TECH-2h - Configure Stock Messages Fact Sheet</a>.*</i>
<b>Unit Pricing</b>	Stores of a certain size must display the price of certain products as a standard unit of measurement. Select <b>Exception</b> if unit pricing doesn't apply for this product. <i>*Refer to the <a href="#">ACCC's Unit Pricing: a Guide for Grocery Retailers</a>.*</i>
<b>Status</b>	Some organisations use status codes to define whether the product is available to order &/or sell.
<b>Linked</b>	Indicates that this stock code has been combined with another record using the <b>Combine</b> function.
<b>Store Ranged</b>	Some organisations stock some products in particular stores but not in other stores; when selected, this indicates that this store does stock the item.
<b>Grade</b>	Some organisations grade the quality of products; store profiles are used for ordering.
<b>Perpetual Stock</b>	Indicates that you manage inventory (SOH) for this product; the <b>Stock On Hand</b> field in the <b>Summary Information</b> section lists a units value instead of 'N/A'.
<b>Stocked (BOS)</b>	Indicates that the product is part of your range; is automatically selected if it's receipted, invoiced, or sold at POS. Scheduled changes tickets are usually configured to only print for stocked products.
<b>On Hold (HOS)</b>	Indicates that this product record/changes made won't be sent to stores when HOS Export runs. This can be configured to be automatically set for new lines hosted into the HOS.
<b>Sales Restriction</b>	Stops all EANs from being sold at POS, such as recall items. A message is displayed <i>'Item is not for sale. Do not place item back on shelf for selling. Enter Supervisor ID to override item restriction.'</i>
<b>Permanent Override</b>	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 [\$0.00]): <b>IMPORTANT: Overrides are only applied if your system is configured to review this setting.</b> <b>Not Overridden:</b> apply all changes imported; usually set for non-HOS driven stores. If an <b>Override</b> is selected, all details are imported except for the selected override; e.g. <b>Override margin</b> will keep existing margin, & apply all other changes (usually set for HOS driven stores).
<b>Department and Product Group</b>	The <b>Department</b> hierarchy that the product is reported against. A <b>Product Group</b> is a code assigned to products from the same manufacturer (e.g. Arnott's may be 02-arnotts). Used in HOS rebates, and reporting. The host supplier file can include this information. <i>*Refer to <a href="#">TECH-4b Configure Department Hierarchies Fact Sheet</a> &amp; <a href="#">TECH-4e Configure Product Groups Fact Sheet</a>.*</i>

## Stock Tab – Extended

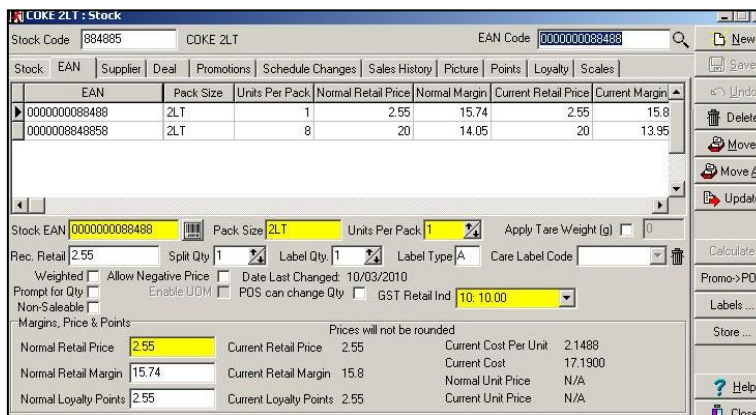


Field	Description
<b>Ext. Desc 1 and 2</b>	Extra text to print on promotional tickets. From v2.14 this is not usually used, as sub range descriptions for variety tickets can be entered in <b>Tools -&gt; Codes and Descriptions</b> (the description only prints if the label template looks up field/s).
<b>Ext. Desc 3</b>	Records the label location of the product in the store.
<b>Low Alc Rebate</b>	Used by alcohol wholesalers to record the rebate that is available for a low alcohol-content product.
<b>VAS</b>	Populated if there are taxes other than GST associated with this product; 'TAFMO' VAS for recharge/gift cards – If TAFMO Complex is selected, POS brings up the providers webpage for the operator to enter the customers registration details, such as fishing licences.
<b>Host Comments</b>	Auto-populated by the Host file. e.g. Imported from host
<b>Sales Tax Code</b>	Populated if there are taxes other than GST associated with this product; e.g 'WET' tax for liquor.
<b>Stock Levels Min and Max</b>	These values are not used anywhere in SUREfire.
<b>Expense</b>	Selected if this is an expense item e.g. carrier bags; Only the EAN and Supplier tabs apply, all other tabs are hidden. You can record the applicable <b>GL Account</b> expense code. Note: SUREfire doesn't support any General Ledger.
<b>Self Checkout Options</b>	<b>Age Verification:</b> prompts for attendant intervention to check if the customers age <b>Visual Verify:</b> prompts for attendant intervention to confirm all parts of the product are correct. <b>No Sale On Sale Checkout:</b> this product can't be sold on self checkout; e.g. the attendant may not meet age requirements to sell this product (such as liquor).



## EAN Tab

Lists each EAN saved against the same stock code, and the attributes of the selected EAN.



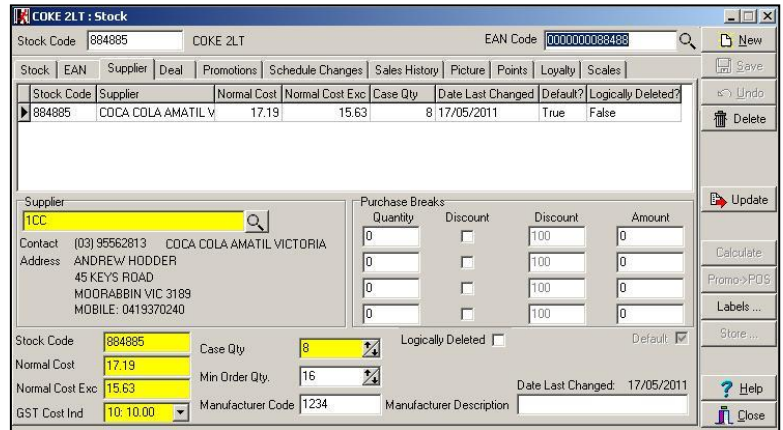
Field	Description
<b>Stock EAN</b>	The 13-digit (or 12-digit and 1 check-digit) barcode on the packaging of the product, the carton, or the delivery box (TUN barcode). An <b>EAN</b> is unique to the product. EANs are listed on the same record, so that all stock movements against the product will correctly adjust the SOH value of the combined product.
<b>Pack Size</b>	The quantity that the product is sold in; displays on tickets. <i>*E.g. 2KG, 150g, 1L, 6PK.*</i>
<b>Units Per Pack</b>	The number of units that inventory will be reduced by when this EAN is sold. <i>*E.g. a beer slab is [6] units, a toilet rolls 6pk is [1] unit.*</i>
<b>Apply Tare Weight</b>	To record the weight of the packaging of a non-deli weighted product (e.g. a mushroom bag that mushrooms are packaged in); it's subtracted from the total weight when the product is weighed on the POS scales. Enter the weight (in grams) in the field, or set a default weight in the <b>System</b> menu -> <b>Properties</b> -> <b>Parameters</b> tab. The scales used to weigh deli products already factors in the packaging.
<b>Rec Retail</b>	The recommended retail price for this product. It's not necessarily the normal retail. Is usually only imported once, when the product file is created during implementation of SUREfire.
<b>Split Qty</b>	No longer used.
<b>Label Qty</b>	The default number of tickets that will print during a ticket request.
<b>Label Type</b>	The default type of ticket that will print in Labels Wizard. [A] = shelf ticket [B] = promotional ticket [Q] = quaint ticket (spices etc)
<b>Care Label Code</b>	A label attached to the product that includes warning/recommendation to the customer about the product; e.g. safety information, washing instructions. The code for the applicable care label is imported from the HOST file; the label text for each code is stored in the <b>Codes and Description</b> function, and is printed when the user selects care label ticket stationary during a ticket request.
<b>Weighted</b>	If selected, inventory and reporting will be in kilos; the system looks at the embedded price and reverse calculate the kilos sold. Usually selected if you order the product in kilos. It prompts the operator to put the product on the deli scales or on the POS scales if it's not a price embedded barcode
<b>Allow Negative Price</b>	If selected, you can type a [-] in the EAN field to sell this product at a negative price; e.g. -\$1.00. A price change is not allowed at POS for negative priced products.
<b>Date Last Changed</b>	Indicates the date which the product details were last changed (by user or imported).
<b>Enable UOM</b>	Not used. Refer to the <b>Scales</b> tab.

Field	Description
<b>POS can change Qty</b>	Currently not available.
<b>Prompt for Quantity</b>	If selected for a specific EAN, prompts the POS operator to enter the quantity after it's scanned/entered in a sale transaction. Note: this disables the <b>Weighted</b> check box. <i>*This is useful for fruit and veg lines sold as 'each' not by weight, to stop operators assuming it's weighted and not capturing the quantity sold.*</i>
<b>Non Saleable</b>	If selected for a specific EAN, prevents the sale of that EAN at POS; a generic message is displayed 'Product is not for sale. Contact your supervisor. Press any key to continue'. The EAN can still be used in PLU Lookup at POS, and for all inventory tasks. Note: if the <b>Sales Restriction</b> check box is selected on the <b>Stock</b> tab, then all EANs will be restricted (it overrides the <b>Non-saleable</b> check box). <i>*A specific message can be configured in POS Config -&gt; Messages tab.*</i>
<b>GST Retail Ind</b>	The GST rate that will be charged to the customer. <i>*Zero indicates that no GST applies.*</i>
<b>Normal Retail Price</b>	The normal (regular) sell price of the product when it's not on promotion. <i>*\$0.00 indicates that the operator will be prompted to enter the price at POS.*</i>
<b>Current Retail Price</b>	The price that this EAN is currently being sold – reflects the active promotion price if it's cheaper than the normal retail price.
<b>Normal Retail Margin</b>	For a given retail price, the percentage of the profit dollars (margin dollars) that is a dollar profit to the business. Calculated as Retail price – ([Per Unit Cost] / Retail price); retail minus unit cost gives the dollar margin. SUREfire uses retail margin, not gross profit.
<b>Current Retail Margin</b>	Current Retail price – ([Per Unit Cost] / Current Retail price).
<b>Normal Loyalty Points</b>	Applies if your business runs a loyalty points reward program, this is the normal amount of points you are giving for the product; default is one point per \$1.00 (set in POS Config).
<b>Current Loyalty Points</b>	The points currently being awarded to this EAN; based on an active loyalty promotion entered on the <b>Loyalty</b> tab (or in <b>HOS pricing</b> ).
<b>Current Cost Per Unit</b>	The unit cost for the product, based on the current cost of the product divided by the UPP.
<b>Current Cost</b>	The current cost of the product per case – reflects any off invoice deals.
<b>Normal Unit Price</b>	The normal price of the product based on the standard unit of measurement selected on the <b>Stock</b> tab. N/A displays if <b>Exception</b> has been selected for unit pricing.
<b>Current Unit Price</b>	The current price of the product based on the standard unit of measurement selected on the <b>Stock</b> tab. N/A displays if <b>Exception</b> has been selected for unit pricing.

- **Prices will not be rounded** means that POS doesn't round the amount of the product e.g. \$1.98 will display on the receipt as \$1.98.
- **Price will be rounded** means that the department this product belongs to has rounding rules applied (configured for the department in the **Tools** menu -> **Rounding Rules** function, and the **Codes and Descriptions** function). E.g. there may be a rule to always round-down prices that end in .99 to .98; typing \$1.99 will automatically change it to \$1.98 on the stock record.

## Supplier Tab

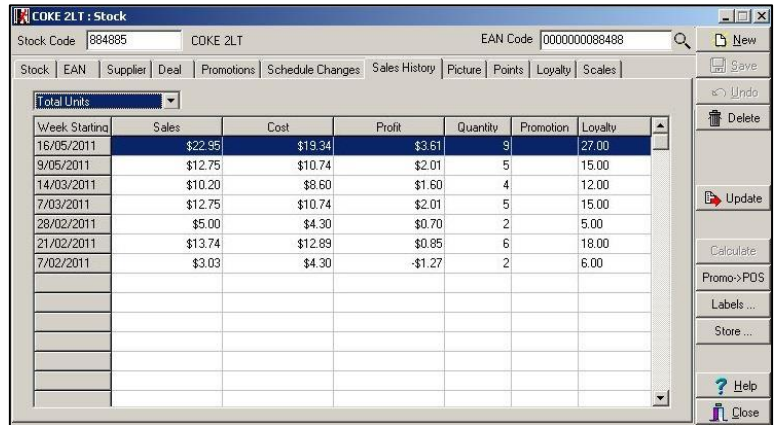
Lists each supplier saved against the same product, and the attributes of the selected supplier.



Field	Description
<b>Supplier</b>	The code for the supplier that you order this product from. Their contact details are auto-populated from their AP record.
<b>Stock Code</b>	Used to order the product from the supplier; each supplier may have a different Stock Code that links that product to them.
<b>Normal Cost</b>	The <u>case</u> cost (GST inclusive) from the supplier. If set to \$0.00, the system calculates a cost for reports using the department default margin % of the sale price (set in Codes and Descriptions).
<b>Normal Cost Exc</b>	The <u>case</u> cost (GST exclusive) from the supplier.
<b>GST Cost Ind.</b>	The GST rate that applies to the product at cost. <i>*Zero indicates that no GST applies.*</i>
<b>Case Qty</b>	The number of units in each case ordered from the supplier. If you change the Case Qty for the default supplier, the <b>Case Qty</b> field on the <b>Stock</b> tab is updated.
<b>Min Order Qty</b>	The minimum number of units that must be ordered; an error will display if a user tries to order less.
<b>Manufacturer Code</b>	The code of the product assigned by the manufacturer. In release 2.14+ you can search for and order the product by manufacturer code.
<b>Manufacturer Description</b>	The name of the manufacturer.
<b>Purchase Breaks</b>	Each supplier can provide up to four quantity breaks (discounts) if you purchase in bulk; the purchase breaks are displayed on the BOS purchase order screen for reference.
<b>Logically Deleted</b>	Indicates that the product can't be ordered from this supplier anymore; is manually selected or set by HOST import. You can configure the system to flag logically deleted suppliers for physically deletion after a certain number of days. <i>*Refer to the <a href="#">PRO-1f Logical and Physical Deletion Fact Sheet</a>.*</i>
<b>Default</b>	Indicates that this supplier is the default ordering supplier ('True'); 'False' is displayed against all other suppliers listed. There can only be one default supplier; if you select the default check box against another supplier, they become the default supplier ('True'). Note: In a HOS, the default supplier is set in HOS Pricing (as there may be a different default for each zone); the default selected on the Stock record is only used for reports that use this filter.
<b>Date Last Changed</b>	The date that changes were either manually or imported on this tab.

## Sales History Tab

Lists the weekly sales history of the selected UPP (units per pack) or EAN since it was first sold (unless older sales history is purged). A week isn't listed if there were no sales during that week.



If there are multiple EANs with the same UPP, you will need to change the one currently selected on the **EAN** tab to review sales just for this packaging.

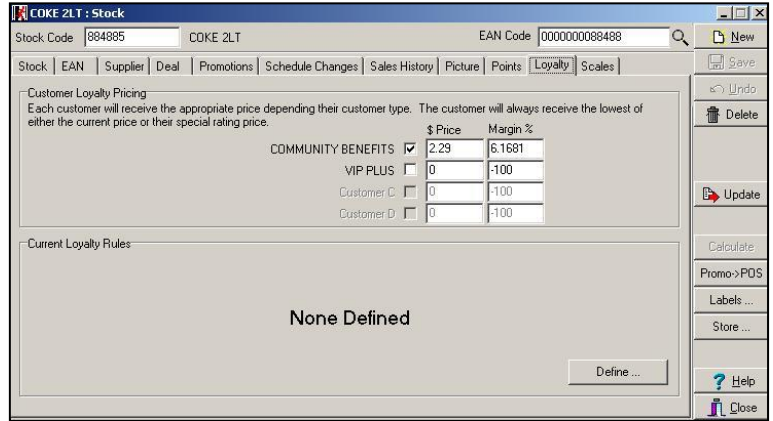
Field	Description
<b>Sales</b>	The total dollar value of sales (includes promotional).
<b>Cost</b>	The total cost of the sales.
<b>Profit</b>	The total gross profit (retail minus cost) earned from the sales.
<b>Quantity</b>	The number of units sold.
<b>Promotion</b>	The promotion code for a promotion effective for this EAN during the week.
<b>Loyalty</b>	The total value of loyalty points awarded for this EAN.



## Loyalty Tab

Lists the active loyalty promotions for the product; these are created on the Promotions tab.

**It's not recommended to edit pricing on this tab, as the price won't revert back to the normal price once the loyalty promotion ends.**



Field	Description
<b>Customer level</b>	A maximum of four alternative customer pricing levels can be active at any time. A customer only receives the promotion if they either present a card linked to the price level, or have an AR account linked to the price level. If a customer is eligible for two price levels, they'll receive the one that's the cheapest price. <i>*Refer to the <a href="#">TECH-4d Configure Special Customer Pricing Fact Sheet</a>.*</i>
<b>\$ Price</b>	The loyalty promotion retail price.
<b>Margin %</b>	The current margin using the loyalty price ( $[\$ \text{ Price} - \text{Current Cost per unit}] / \$ \text{ Price}$ ).
<b>Current Loyalty Rules</b>	This is no longer used; use the Discount Wizard application.