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Category	Product
Course	Stock Records
Version	1.1
Client	Generic
Software	2.12.100

Maintain a Stock Record

Every product and POS Quick Item button in SUREfire has a stock record. If your business is Head Office managed, check what information can be changed at store-level.

Hints and Tips

- ✓ Note: Head Office users use the **HOS Pricing** function to manage pricing, deals, and promotions.
- ✓ If you change the **UPP** or **department hierarchy**, any deals/promotions that were set up using this 'affect' are removed once daily tasks run, as they no longer apply.

✓ **Function** buttons, if permitted:

	Create a new entry, depending on the tab you click New on.
	Save your changes.
	Undo all changes since you last saved.
	Mark the stock record, an EAN, or a supplier for physical delete.
	Un-mark the entry for physical deletion.
	Link two stock records.
	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 auto generated ticket; print it from the Labels Wizard function.
	Not used anymore; use the Tools menu -> Stock Functions -> SOH Enquiry function.

- ✓ There can be only one **default supplier** for a product.




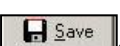
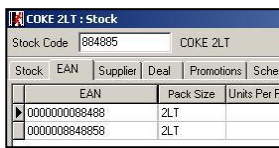


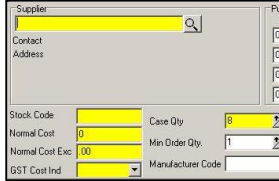

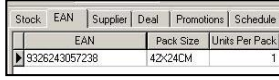


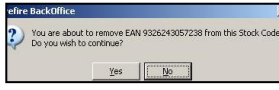
Procedure to Maintain a Stock Record

1.	From the BOS/HOS Tools menu, select Stock Functions , then Stock . <i>*Or click the Stock Maintenance icon.*</i>															
2.	In the EAN Code field, type, or search for, the EAN that you want to edit. <i>*Alternatively, in the Stock Code field, type the stock code.*</i>															
3.	Press Enter or Tab if you typed the code. <i>*The product details are displayed.*</i>															
4.	<table border="1"> <tr> <td>To:</td> <td>then:</td> </tr> <tr> <td>edit a field</td> <td>overtyping the existing entry. Click </td> </tr> <tr> <td>add a stock message that displays at POS for the operator</td> <td>click the Stock tab. Select the Stock Message. Click <i>*Refer to the TECH-2h Configure Stock Messages at POS Fact Sheet.*</i></td> </tr> <tr> <td>add a picture of the product (can be used on a ticket report template)</td> <td>click the Picture tab. Right-click and select Add. Navigate to and select the required saved image. Click Open. Click Save.</td> </tr> <tr> <td>change the default ordering supplier</td> <td>click the Supplier tab. Select the supplier who will be the new default supplier. Select the Default check box. Click </td> </tr> <tr> <td>change retail, cost, or margin</td> <td>refer to the PRO-2a In-store Immediate Price Changes Fact Sheet.</td> </tr> <tr> <td>change scale data</td> <td>refer to the PRO-1d Maintain Scales Data Fact Sheet.</td> </tr> </table>	To:	then:	edit a field	overtyping the existing entry. Click	add a stock message that displays at POS for the operator	click the Stock tab. Select the Stock Message . Click <i>*Refer to the TECH-2h Configure Stock Messages at POS Fact Sheet.*</i>	add a picture of the product (can be used on a ticket report template)	click the Picture tab. Right-click and select Add . Navigate to and select the required saved image. Click Open . Click Save .	change the default ordering supplier	click the Supplier tab. Select the supplier who will be the new default supplier. Select the Default check box. Click	change retail, cost, or margin	refer to the PRO-2a In-store Immediate Price Changes Fact Sheet .	change scale data	refer to the PRO-1d Maintain Scales Data Fact Sheet .	
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Hints and Tips

- ✓ Combine two stock records that should be a single record (usually for multiple selling units; e.g. coke single and slab).
- ✓ **Add an EAN:**
You add an EAN to an existing record, rather than create a new stock record, if :
 - the EAN is a different selling multiply of the same product ordered; e.g. a pack & a carton of cigarettes, or a single can or slab of coke
 - product packaging changes and the UPP stay the same.
 All stock movements against the product will correctly adjust the SOH value of the combined product.
- ✓ **Add a Supplier**
 - Try and use the **stock code** that will display on the supplier order invoice.
 - An error is displayed if you try to enter a **stock code: supplier** combination that already exists on another record. You probably need to move that stock code to this one.
- ✓ **Move EANS:**
 - Move an EAN when the supplier has allocated it a new stock code, or to clean up bad data.
 - The host/supplier import file may be configured to automatically do this task.
 - If there's an EAN on the new record that has the same UPP, then the moved EAN's retail, cost, margin, and retail GST are changed to match.
 - All historical sales of the EAN are moved.
 - If all EAN's are moved, SOH is also moved to the new code.
 - If all EAN's are moved, one is left on the old stock record, set to \$0.00 & preceded with an 'M' e.g. M326243057238. You must physically delete this EAN if you want to remove the entire product record.







<p>5. To:</p> <p>combine two stock records</p> <p>add another EAN to this stock record</p> <p>add another supplier to this stock record <i>(an AP record must exist for the supplier)</i></p> <p>move an EAN to a different stock code <i>(the other stock code record must already exist)</i></p>	<p>then:</p> <p>refer to the PRO-1e Link Stock Codes Fact Sheet.</p> <p>click the EAN tab. If there's more than one existing EAN, select the EAN to base the new one on.</p> <p>Click </p> <p>In the Stock EAN field, type the barcode of the product. Edit any field/s as required.</p> <p>Click </p> <p><i>*If a HOS user, open HOS Pricing to set Retail Price.*</i></p> <p>click the Supplier tab.</p> <p>Click </p> <p>In the Supplier field, type, or search for, the supplier code. In the Stock Code field, type the products' ordering code. In the Normal Cost field, type the <u>case</u> cost GST inclusive. Select the GST Cost rate. Select the Case Qty. Enter any optional fields; select the Default check box if this is the new default supplier.</p> <p>Click </p> <p>click the EAN tab. Select the EAN to move. Click either Move to move a single EAN, or Move All to move all EANs. Search for the stock record you want to move the EAN/s to; highlight it & click Select. Click Yes to continue. Click OK.</p>	        
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Hints and Tips

✓ If you need to **split a stock code** from a stock record you must first rename the stock code; SUREfire doesn't let you add a stock code for the supplier if it already exists.

5.	<p>To:</p> <p>split a stock code and EAN from an existing stock record (E.g. if you linked the wrong product or to clean up incorrect data)</p>	<p>then:</p> <p>click the Supplier tab.</p> <p>Change the Stock Code that you want to split. <i>*E.g. add a [D] at the start of the code.*</i></p> <p>Create a new stock record for the stock code you want to split; add a dummy EAN.</p> <p>Use the Move function to move the applicable EANs to the new stock record. <i>*Refer to the Move function on the previous page.*</i></p> <p>Delete the dummy EAN that you created; select the EAN and click </p> <p>Delete the old stock code that you renamed; select the stock code and click </p> <p><i>*The deleted EAN and stock code are removed once the physical deletion utility runs.*</i></p>	
6.	<p>If:</p> <p>a head office (HOS) user</p> <hr/> <p>a store (BOS) user</p>	<p>then:</p> <p>the changes for products not 'on hold' will be sent to stores when HOS Export/Import runs.</p> <hr/> <p>select one option:</p> <ul style="list-style-type: none"> • click Update, OR • run Price Update to apply several records, OR • or let the automatic update apply it. 	  
7.	Click  when finished.		
			