SURE*fire* SYSTEMS

Retail Profiling

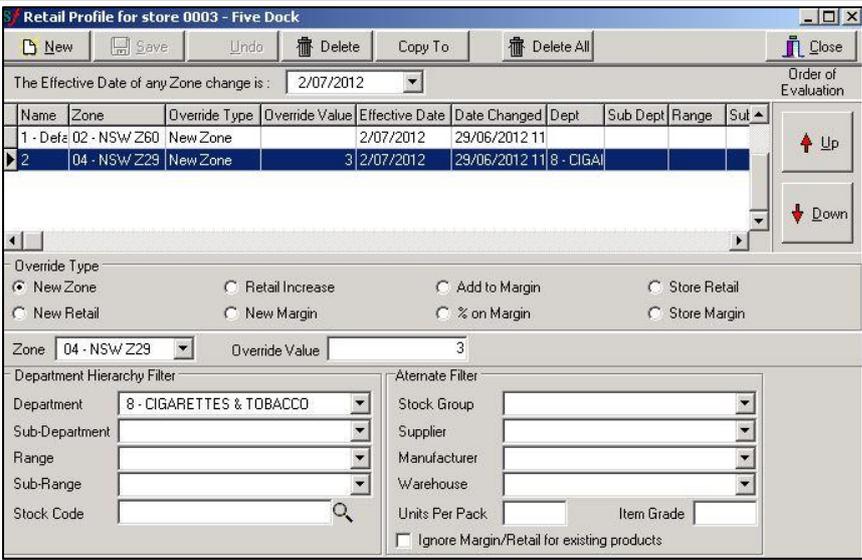| **TECH-1d** *Page| 1 of 2*	
Category	Technical
Course	Location Setup
Version	1.1
Client	Generic
Software	2.18.4.68

Use retail profiling if your business uses zone pricing, but you have a store that will sell certain products for a different price compared to others stores in that zone.

Procedure to Manage Retail Profiling for a Store

Hints and Tips

✓ Profile overrides are useful when you have several stores in a zone, but there are store-specific reasons, such as freight or competition, that means identical pricing isn't profitable.

✓ You can use retail profiling in combination with cost profiling.
  ● Refer to TECH-1c HOS Cost Profiling Fact Sheet.

✓ The profiling screens are the only place you can view the alternate prices set for a store; HOS pricing & the stock screen only show the zone prices.

✓ From 2.18.4.68, Profiling shows in BOS Location Setup (for Admin users), to check what has gone down from the HOS.
  ● Any edits done on the BOS will be overridden by HOS.

✓ You can override the zone price on multiple levels, such as:
  ● selling all the products in a selected department at the prices set for another zone
  ● selling a specific product at a different retail price compared to the other stores in the zone
  ● letting a specific store maintain their own prices in a selected department, such as fruit and veg.

✓ Every store already has a default zone against them, based on the entry in Store Details. DO NOT DELETE THIS ENTRY.

1.	From the HOS **System** menu, select **Location Setup**.	
2.	Select the Location that you want to define a profile for. *You can only set up profiles at the store level.*	
3.	Double-click the **Retail Profile** icon. *Any previously created profiles are displayed in the grid.*	

4.	To:	then:
	add a new override	go to step 6.
	edit an override *DO NOT edit the default override*	click the profile in the grid. Make the required changes. Click [Save]. *End of Process*
	delete an override *DO NOT delete the default profile*	click the profile in the gird. Click [Delete]. Click **Yes** to confirm. *End of Process*

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Hints and Tips

✓ To prevent errors, it's recommend that you keep the **Effective Date** that's populated from HOS Pricing, as the system can't handle multiple future dated changes.

✓ The **Alternative Filters** can be used instead of or in combination with a **Department Hierarchy Filter,** to narrow the application of the override.
  • e.g. to apply a zone override to all products in the <u>Grocery</u> department that are supplied by <u>supplier 'x'</u>.
  • Select **Ignore Margin/Retail for existing products** if the store maintains their own pricing; the override will only apply to new lines hosted, other price changes made in HOS pricing will be ignored.

✓ Profiling is transferred and applied to stores as part of normal HOS export and store scheduled tasks.
  • If the store prints host tickets before profiling has finished running, they will get the zone price not the profile price.

✓ Overrides are applied in numerical sequence, so the last override that applies to each product (based on the criteria) is what will be used to generate the price for the product.

Example: product ABC which belongs to Dept A, Sub Dept B, Range C
  • override 1 – Default: use zone 1
  • override 2 - Dept A use zone 2
  • override 3 - Dept A, SubDept B - Margin 30%
  • override 4 - product ABC - Keep Store Retail

Product ABC will keep store retail as that is the last override

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5. Complete the following steps to create a new profile:

  • Click [New].
  • Set the rules for the profile override; the table below lists common overrides:
    See Hints and Tips.

To:	then:
set an entire category to a different zone price (e.g. cigarettes)	select the **Override Type** option **New Zone**. Select the **Zone** to use. Select the criteria to override.
set a specific product to a new retail price	select the **Override Type** option **New Retail** or **Retail Increase**. Select the default **Zone** for the store. In the **Override Value** field, type the new retail price or dollar increase. Select the **Sub-Range** or **Stock Code** that will be the new price. Type the **Units Per Pack** that the price applies to. *You'll need to create an override for each UPP that you want a new price for.*
let the store set their own retail for a category (ignore hosted zone retail prices)	select the **Override Type** option **Store Retail** or **Store Margin**. Select the default **Zone** for the store. Select the criteria that will use store retails.

Click [Save].
The new override is added to the list.

6. Use the **UP/Down** arrows to set the order you want the overrides to be applied in.
See Hints and Tips.

7.

To:	then:
add another override	return to step 6.
finish	click [Close].