

TECH-1a Page | 1 of 4

Category	Technical
Course	Location Setup
Version	1.0
Client	Generic
Software	2.14.0.0

Add a New Store to a HOS

The easiest way to configure a new store is to copy and paste an existing store; all the lanes and configuration are copied across for you to customise them to the new store.

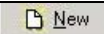
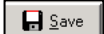
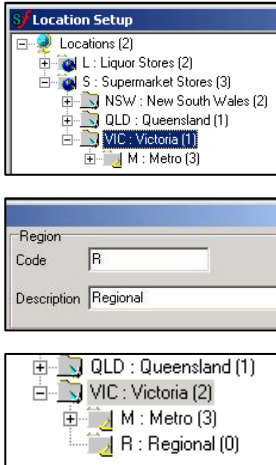

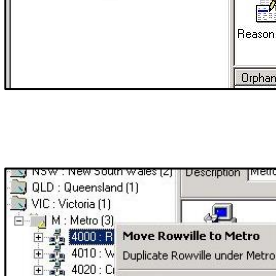

Procedure to Add a New Store to a HOS

Hints and Tips

- ✓ All the configuration of the copied store/registers is copied across to the new store.
- ✓ Once you have created the new store, SUREfire support will usually export all the store config and do a **Store Load** of the data as a task when they build the POS machines.
- ✓ The following functions are usually configured at the top most location level (e.g. Supermarket stores), so that they apply to all the stores.
 - Configure (POS config.)
 - Reason Codes
 - Quick Items
 - Gift Certificate Types
 - Discounts
 - Media packages.

If you want to apply different configuration to the State/Region that the new store belongs to, expand the Location to that level before selecting the function.

Important: Only Reason Codes and Discounts will be highlighted red to indicate if they're not the same between the sub-levels. If you change/add something at the higher level (e.g. State level), this will automatically override the differences at the sub-level (e.g. store level).

1.	From the HOS/BOS System menu, select Location Setup .	
2.	If the State or Region the new store will belong to doesn't already exist, complete the following steps to create it: <ol style="list-style-type: none"> a. Expand the Location down to the level you want to add the new State/Region against. b. Click . c. Type the Code and Description for the new State/Region. d. Click . *The State/Region is added to the location.* <ol style="list-style-type: none"> e. Repeat steps b to d if there's a region to add. 	
3.	Expand the Location folder down to the store you want to use as the base (copy). <p><i>*It's easiest to select a store in the same State that the new store will be added against, but you can copy a store from a different State.*</i></p>	
4.	Click and drag the store against the level (sub-folder) you want to add the new store against. <p><i>*You can only add the store against the lowest location that stores are grouped into; e.g. if your location hierarchy is Supermarkets -> Vic -> Metro -> store1/store2, the paste option is only enabled when you hover over Metro (not over Vic).*</i></p>	
5.	Select the Duplicate option. <p><i>*The new store is added against the selected group.*</i></p>	
6.	In the Code field, type the new store number. <p><i>*You usually make this the next in sequence.*</i></p>	
7.	In the Description field, type the store name.	
8.	Click OK .	

TECH-1a Page | 2 of 4

Hints and Tips

- ✓ The number of lanes against the store initially displays as (0); it updates to the correct number once you close and reopen Location Setup.

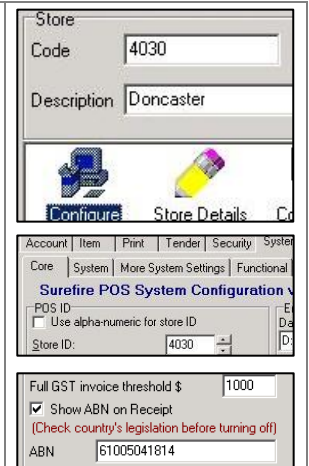


- ✓ Profile overrides are useful when you have several stores in a zone, but there are store-specific reasons, such as freight or competition, that means identical pricing isn't profitable.

9. Complete the following steps to update the store number and ABN in POS Config.

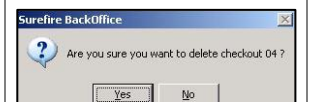
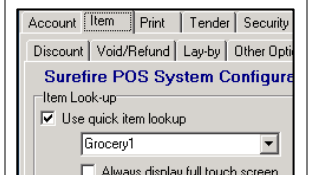
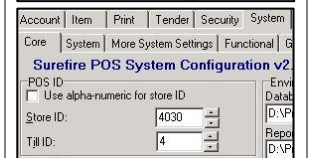
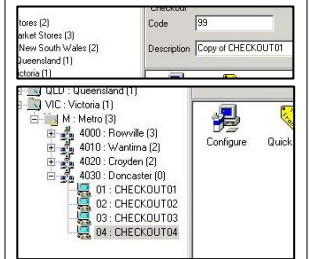
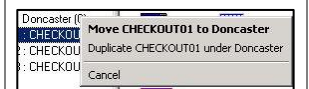
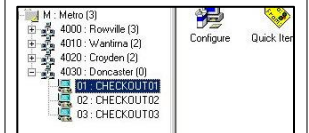
This is required because these details are copied from the copied store to the new store.

- With the new store selected, double-click **Configure**.
- Click the **System** -> **Core** tabs.
- In the **Store ID** field, type the new store number.
- Click the **System** -> **System** tab.
- In the **ABN** field, type the new store's ABN.
- Click and .



10. The new store may have a different number of lanes compared the copied store. Complete the following steps to add or remove lanes as necessary.

To:	then:
add another lane	<p>expand the new store to see the checkouts.</p> <p>Click and drag an existing checkout against the name of the store.</p> <p>Select the Duplicate option.</p> <p><i>*The new checkout is added.*</i></p> <p>Overtyping the Code (lane number) and Description to the next in the sequence.</p> <p>Click .</p> <p>With the new checkout highlighted, double-click the Configure shortcut.</p> <p>Click the System -> Core tabs.</p> <p>Change the Till ID to the lane number of the new register.</p> <p>If this lane will operate with a different Quick Items menu to the rest of the store (e.g. a liquor lane), click the Item -> PLU tab and select the applicable menu.</p> <p>Click and .</p>
remove a lane	<p>expand the new store to see the checkouts.</p> <p>Click the checkout to remove.</p> <p>Click .</p> <p>Click Yes to confirm.</p> <p><i>*The lane is removed.*</i></p>



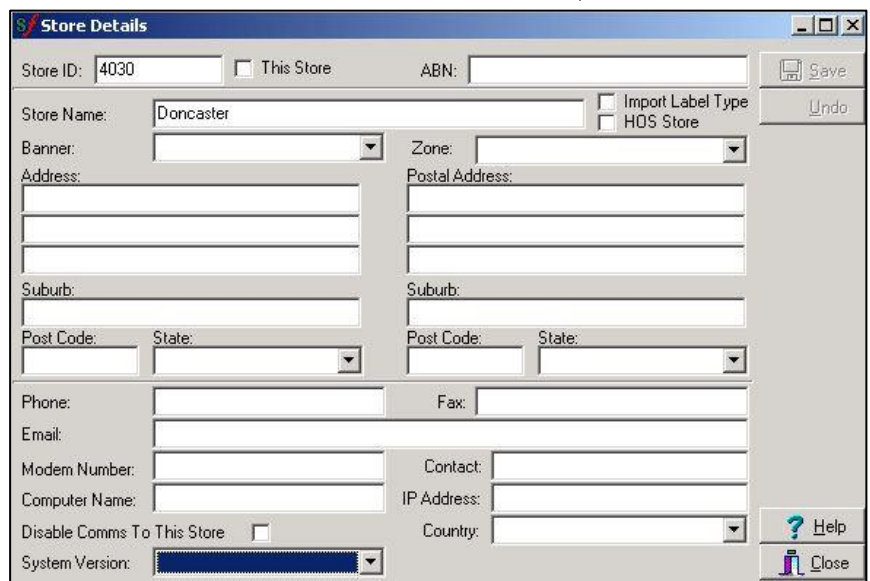
TECH-1a Page | 3 of 4

Hints and Tips

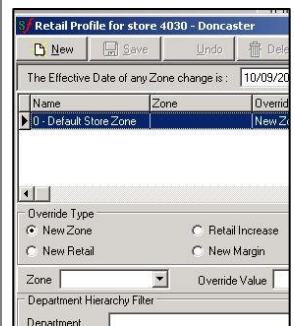
- ✓ The **Computer Name** and **IP Address** must be completed. If these details are left blank, it will cause export problems for other stores.
 - If you ever decide to stop ALL communications from being exported to the store, you would select the **Disable Comms To This Store** check box, rather than simply clear these fields.

- ✓ **Retail Profile** and **Cost 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.

11. Complete the following steps to update the store details:
- a. Click the newly created store.
 - b. Double-click the **Store Details** icon.
 - c. Type the **ABN** for the store.
 - d. Select the **Banner** the store will belong to.
 - e. Select the **Zone** the store will belong to (the same selected at step 12).
 - f. Type the store contact details
**Postal Address is used on AR statements*.*
 - g. Type the **Computer Name** & the **IP Address**.
See Hints and Tips.
 - h. Click and .






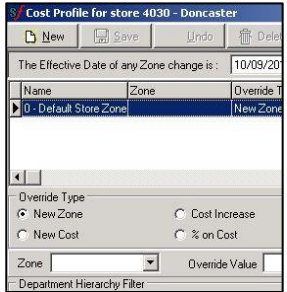
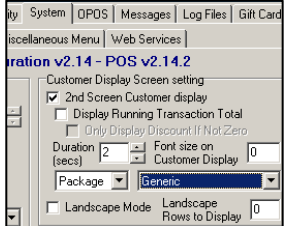

12. Complete the following steps to allocate the newly created store to a retail zone.
- *Zone details aren't copied from the copied store.**
- a. Click the newly created store.
 - b. Double-click the **Retail Profiler** icon.
 - c. For the default store zone profile highlighted, select the **Zone** to apply against the profile.
 - d. Add any other profile overrides as required.
E.g. if the liquor department or specific products will have a different profile to the store.
Refer to the [TECH-1d HOS Retail Profiling Fact Sheet](#).
 - e. Click and .



TECH-1a Page| 4 of 4

Hints and Tips

- ✓ If the new store will sell **GiveX gift cards** and/or **Tafmo recharge cards**, SUREfire support will usually request the set-up username/password and configure these for you.

<p>13. Complete the following steps to allocate the newly created store to a cost zone. <i>*Zone details aren't copied from the copied store.*</i></p> <ol style="list-style-type: none"> Click the newly created store. Double-click the Cost Profiler icon. For the default store zone profile highlighted, select the required Zone to apply. Add any other profile overrides as required. <i>*E.g. if the liquor dept or specific products will use a different profile to the store.*</i> Click  and . <p><i>*Refer to the TECH-1c Cost Profiling Fact Sheet.*</i></p>	 
<p>14. If your business runs media packages, evaluate if the package that's been assigned to the level this new store belongs to is appropriate for this store. <i>*The package is assigned in Location Setup -> POS Config -> System -> Functional tab.*</i> <i>*Refer to TECH-1g Configure Media Packages Fact Sheet if you need a refresher on this task.*</i></p>	
<p>15. If your business uses banner messages, configure any store specific messages applicable to this store. <i>*Refer to the TECH-1j Configure Operator Messages Fact Sheet.*</i> <i>*Any existing messages that were assigned at a higher Location level that this store belongs to will automatically be sent down to this new store when SUREfire Support runs the Store Load.*</i></p>	
<p>16. Discounts will automatically be sent down to this new store when SUREfire Support runs the Store Load. <i>*Only discounts that were originally activated at the higher Location level that this store belongs to will be inserted and set to 'Active' for this store in the Discounts function in Location Setup.*</i> If there are any store specific or location specific discounts, evaluate if you want them to also be active at this new store. <i>*Refer to the PRO-3f Activate a Discount Fact Sheet if you need a refresher on this task.*</i></p>	
<p>17. If this new store will support electronic invoicing, configure the store and supplier details for this. <i>*SUREfire Support can perform this task for you if you require assistance.*</i></p>	
<p>18. On the Location Setup screen, click .</p>	