Need help? Tel: 1300 724 667   Email: support@surefiresystems.com

SUREfire

PRO-1a	*Page| 1 of 6*
Category	Product
Course	Stock Records
Version	1.4
Client	Generic
Software	2.18.5.0

Create a New Stock Record

Every product that you want to sell at POS and/or report on must have a stock record in SURE*fire*.
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-ridden 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 **Tools** menu, select **Stock Functions**, then **Stock**. *Or click the **Stock Maintenance** icon.*	
2.	On the **Stock** tab, click ☐ New .	

3.	**To:**	**then:**	
	create the record from scratch	go to step 5.	
	copy an existing 'like' product *(this saves time on data entry)*	select the **Base new stock item on an existing stock item** check box. In the **Enter EAN Number to use as base** field, type or search for the 'like' product. *All the fields are populated, except **Stock Code** & E*AN*.* Go to step 5 Edit the fields as required.	

4.	In the **Stock Code** field, type the suppliers unique code you'll use to order this product. *Usually 6 characters, maximum 12 characters.* *It can be characters and/or digits.*	

Need help? Tel: 1300 724 667   Email: support@surefiresystems.com

SURE*fire*

PRO-1a *Page| 2 of 6*

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 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 receipted, 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.
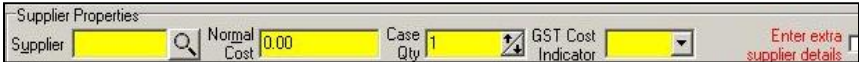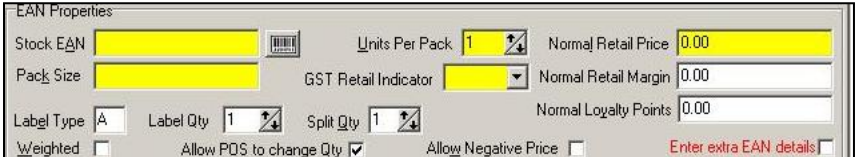
5.	In the **Description** field, type a full summary of the product. *Maximum 30 characters.*
6.	In the **Short Description** field, type the text that might be used on some of your tickets. *Maximum 12 characters.*
7.	In the **Size Desc** field, type the individual size of one selling unit of the product. *E.g. weight, fluid measurement, quantity per selling pack; e.g. 50g, 50ml, 2LT, P/KG, EA, KG, 6PK.*
8.	In the **Warehouse** field, select the source of this product. *E.g. Warehouse, Direct, [Z] slower seller/delivery.*

9.	**If unit pricing**	**then:**
	applies to your business/this product	in the **Size** field, type the measure of an individual unit of the product. *E.g. 0 .5 (for 500g), 1 (1L).* In the **Measure** field, select the applicable standard unit of measure.
	doesn't apply	select the **Exception** check box.

10.	**If you are a:**	**then:**
	Head Office (HOS) user	select the **On Hold** check box if you don't the record be exported to stores yet
	Back Office (BOS) user	select the **Stocked** check box to indicate the product will be ranged in the store.

11.	If a BOS user, select the **Perpetual Stock** check box if you'll manage SOH (inventory).
12.	In the **Permanent Override** field, select the applicable option. *See Hints and Tips.*
13.	In the Department section, select the **Department**, **Sub Department**, and **Range** that this product will be reported against. *Sub Range is assigned on the Enter Extra Supplier Details screen.*
14.	In the **Supplier** field, type, or search for, the code for the supplier you'll order from. *Select the Enter Extra Supplier Details check box if there are multiple suppliers; when you click Next you'll enter their details & select the default one.*

Need help? Tel: 1300 724 667   Email: support@surefiresystems.com

SUREfire SYSTEMS

PRO-1a *Page| 3 of 6*

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:** To register these items, go to Additional Notes to Create a Prepack or Random Weight Item on page 6.

✓ 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.

15.	If a Store user, in the **Normal Cost** field, type the <u>case</u> cost (GST inclusive). *HOS users set this in the **HOS Pricing** function.*
	Supplier Properties — Supplier, Normal Cost 0.00, Case Qty 1, GST Cost Indicator, Enter extra supplier details
16.	In the **Case Qty** field, type the number of selling units that this supplier will deliver when you order [1] case.
17.	In the **GST Cost Indicator** field, select the GST rate that applies to the product at cost. * Select a zero GST if no GST applies.*
18.	In the **Stock EAN** field, type the barcode of the product. *EAN validation isn't required.* *For a pre-pack, go to Additional Notes to Create a Prepack or Random Weight Item on page 6.* *Select the **Add Extra EAN details** check box if there are multiple EANs or it's a TAFMO card; when you click **Next** you'll enter these details.*
	EAN Properties — Stock EAN, Units Per Pack 1, Normal Retail Price 0.00, Pack Size, GST Retail Indicator, Normal Retail Margin 0.00, Label Type A, Label Qty 1, Split Qty 1, Normal Loyalty Points 0.00, Weighted, Allow POS to change Qty ✓, Allow Negative Price, Enter extra EAN details
19.	In the **Pack Size** field, type the quantity that this EAN is sold in; will display on shelf tickets. *E.g. P/KG, 2KG, 150g, 1L, 6PK.*
20.	In the **Units Per Pack** field, select the number of units that inventory will be reduced by when this EAN is sold. *E.g. beer slab is [6] units, toilet rolls is [1] unit.*
21.	In the **GST Retail Indicator** field, select the GST rate that'll be charged to the customer. * Select a zero GST if no GST applies.*
22.	In the **Normal Retail Price** field, type the regular sell price of this EAN. *Set to $0.00 to prompt for price at POS.* *HOS users set this in the **HOS Pricing** function.*
23.	Complete the following fields as required: • **Label Type** (defaults to A) • **Weighted** • **Label Qty** (defaults to 1) • **Allow Negative Price** • **Normal Retail Margin** (defaults to Retail price – ([Per Unit Cost] / Retail price). *HOS users set margin in **HOS Pricing** function.*
24.	Click **Next**.

Need help? Tel: 1300 724 667   Email: support@surefiresystems.com

SUREfire SYSTEMS

PRO-1a Page| 4 of 6

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. EPay PIN (giftcards), EPay ETU (vouchers), EPay Blackhawk, Linkly-Incomm giftcards, 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 if this is an expense item e.g. carrier bags. Note: SUREfire doesn't support any General Ledger.
- **Stock Levels:** not used.

✓ **Extra Supplier Records screen:**
- **Purchase Breaks:** each supplier can provide up to four percent-off or new cost (incl. GST) discounts for purchasing in bulk (cases).
- **Description:** not used.
- **Min Order Qty:** the minimum units that must be ordered.
- **Units:** not used.
- **Manufacturer Code:** the code of the manufacturer who supplies this product into the Supplier's warehouse/DC. It is hosted for Metcash lines.
- **Manufacturer Description:** name of the manufacturer.
- **Manuf Ref:** The source suppliers code for this product. It may have to be unique in your business (controlled by System Params)

✓ **Extra EAN screen is 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.

25.	If you selected:	then:	
	no extra detail	go to step 26.	
	the **Enter Extra Stock Details** check box at step 13	complete the optional fields as required. *See Hints and Tips.* Click **Next**.	
	the **Enter Extra Supplier Details** check box at step 14 (to add extra details or another supplier)	complete any optional fields, and then click **Save Supplier**. To add another supplier: • click **Add Supplier.** • Enter their details. • Click **Save Supplier**. • Select the **Default** check box for the main supplier. • Click **Next** when finished.	
	the **Enter Extra EAN Details** check box at step 18 (to add an EAN)	click **Add EAN**. Complete the details the same way as the first EAN. Click **Save EAN**. Click **Next** when finished.	

26.	If the details:	then:	
	are incorrect	click **Previous** and fix them.	
	are correct	click **Finish**. If a Head Office user, click **HOS Pricing** to set pricing. Click **Continue** to create another record, or **Close** display the new record.	

27.	If required, complete the **Scales** tab. *Refer to PRO-1d Maintain Scales Data Fact Sheet.*	

28.	If required, select the following option/s on the **EAN** tab for a selected EAN: • **Prompt for Qty** check box • **Non-Saleable** check box • **Tare weight** check box.	

| 29.	If:	then:	
	a head office (HOS) user	the record is sent to stores when **HOS Export** is run.	
	a store (BOS) user	click **Update, OR** run **Price Update** (via BOS folder) to apply several records. Click **Send to Scales** (via BOS folder) if a deli-scale product. *OR let the automatic update apply changes overnight.*	
	A ticket will be auto generated when the store receipt or invoice the stock for the first time. *If applicable, view the Item ID for the item (auto-generated when you saved) on the **Stock** tab.*		
			❑

Need help? Tel: 1300 724 667   Email: support@surefiresystems.com

SUREfire SYSTEMS

PRO-1a *Page| 6 of 6*

Additional Notes to Create a Prepack or Random Weight Item

Prepack items or random-weight EANs are products such as meat packs/trays or deli ham sold by weight.

These types of product have the price embedded into the barcode (either a 4-digit price or a 5-digit price), and have a check digit either side of the price. Of course, you can't register the product with every price variant, which is why you use a prefix and a special format/sequence that POS can interpret.

1.	First, complete all the standard fields on the **Stock** tab, that are common to all products.	
2.	In the EAN field, enter the applicable format:	

If price is:	**Then in the EAN field:**
4-digits	a. Type the prefix used. (i.e. 02). b. Type the plu. c. Type zeros [0]'s to pad the check digits and price, to total to 13 digits. *The format of the barcode is PPxxxxxC$$$$C. *e.g. 0287487107990 is registered as 0287487000000.* *If tThe PLU
5-digits	a. Type the prefix used. (i.e. 20, 22, 24, 28, 29). b. Type the plu. *The PLU needs to be shorter to allow more room for the 5 digit price.* c. Type zeros [0]'s to pad the check digits and price, to total to 13 digits. * The format of the barcode is PPXXXXC$$$$$C. e.g. 2987636017991 is entered as 29876230000000.*

3.	In **Normal Retail Price,** enter the kilo price.	
4.	Select the weighted check box if the product is a sold by the kilo (i.e. the price isn't already embedded into the barcode). *This will prompt the operator to put the product on the deli scales, to calculate the selling price.)*	
5.	Continue to register the product as normal.	
		❑

Hints and Tips

✓ Prefix/es must be configured so that so you can enter data on the Stock record Scales tab, and so the Deli Scales and/or POS recognise the barcode.

- **In POS Config**: Go to **Item | PLU** tab. Select the **Header Type,** and enter the prefixes in the **Header Type List** (separated by a comma [,]).

- The prefixes that surefire support for 4-digit price barcodes is (02, 20, 21, 27), and for 5-digit prices is (22, 24, 28, 29). You can have both types in use at POS.
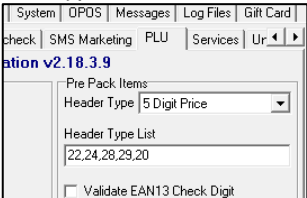
- **In Properties**: Go to **System** tab | **Scale Barcode Prefixes**, enter all the prefixes used. Also enter each one as a 4-digt or 5-digit prefix – this simply allows the BOS to override/tell the Deli scales that this prefix i.e. 29 is a 5 digit barcode.
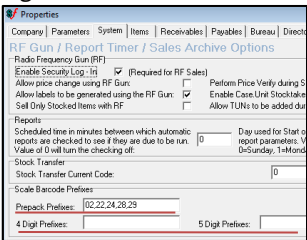
✓ If a product becomes more expensive and needs 5-digit prices (over $99.99), you will change:
- The prefix to a 5-digit one
- The length of the plu, and
- The number of [0]'s to pad out the EAN to 13 digits.

Remember to send to scales, and relabel any prepackaged units that have the old prefix, so they still scan at the POS.

i.e. if the old barcode was **02**0377**000000,** then change it in the Stock Record to be **29**0377**0000000**. The barcode on the deli ticket will be formatted as 29XXXXC$$$$C (C is a check digit).