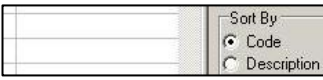
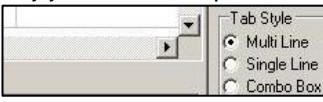


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Category	Technical
Course	Codes & Desc.
Version	1.0
Client	Generic
Software	2.14.100




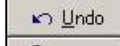

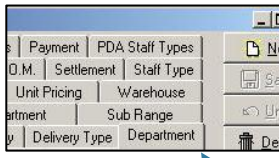


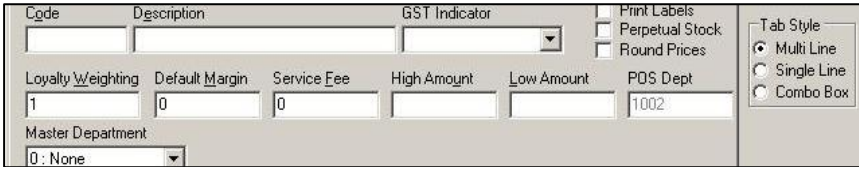

### Hints and Tips

- ✓ If your store is HOS-driven, they may manage the hierarchies. A hierarchy consists of a:
  - Department
  - Sub Department/s
  - Range/s (optional)
  - Sub Range/s (optional).
- ✓ Report:
  - Run the **Reports** menu -> **Maintenance -> Listing - Department** report to view a summary of the hierarchies.
  - Run the **Reports** menu -> **Stock -> Cost Book** report to review product assignment
- ✓ Screen options:
  - **Sort By** options change the order that rows are listed.
 
  - **Tab Style** options change the way you view the top tabs.
 
- ✓ **Department tab fields:** (these are set at Head Office)
  - **Default Margin:** applies if a host file doesn't send a retail margin, or cost is \$0.00. The System Param **Cost Calculated from Dept Margin** must be set to True (on the HOS and manually on each BOS); this will not apply to sales data pre-configuration.
  - **Print Labels:** will prompt you to generate a ticket when you save on the **Stock** screen.
  - **Perpetual Stock:** only sets all existing products in the department to perpetual.
  - **Round Prices:** apply price rounding set up in **Tools -> Rounding Lookup** (e.g. to round to the nearest 99¢).

# Configure Department Hierarchies

Every product in SUREfire is allocated to a department hierarchy, so that you can generate reports and set promotions/deals for a specific grouping of products.

## Procedure to Maintain a Department Hierarchy

1.	From the HOS/BOS <b>Tools</b> menu, select <b>Codes and Descriptions</b> . <i>*Or select the <b>Codes and Descriptions</b> icon.*</i>																	
2.	<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="text-align: left;">To:</th> <th style="text-align: left;">then:</th> </tr> </thead> <tbody> <tr> <td>add a department</td> <td>go to step 3.</td> </tr> <tr> <td>add a sub-dept</td> <td>go to step 4.</td> </tr> <tr> <td>add a range</td> <td>go to step 5.</td> </tr> <tr> <td>add a sub range</td> <td>go to step 6.</td> </tr> <tr> <td>add sub-range text</td> <td>go to step 7.</td> </tr> <tr> <td>edit or delete a department, sub department, range, or sub range</td> <td>click the applicable tab. Click the code to edit. Either: edit the text and click <b>Save</b>, or click <b>Delete</b> and <b>Yes</b> to confirm.</td> </tr> <tr> <td>set a default margin for a department (see Hints and Tips)</td> <td>click the <b>Department</b> tab. Select the department. In the <b>Default Margin</b> field, type the % amount. Click <b>Save</b>.</td> </tr> </tbody> </table>	To:	then:	add a department	go to step 3.	add a sub-dept	go to step 4.	add a range	go to step 5.	add a sub range	go to step 6.	add sub-range text	go to step 7.	edit or delete a department, sub department, range, or sub range	click the applicable tab. Click the code to edit. Either: edit the text and click <b>Save</b> , or click <b>Delete</b> and <b>Yes</b> to confirm.	set a default margin for a department (see Hints and Tips)	click the <b>Department</b> tab. Select the department. In the <b>Default Margin</b> field, type the % amount. Click <b>Save</b> .	   
To:	then:																	
add a department	go to step 3.																	
add a sub-dept	go to step 4.																	
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set a default margin for a department (see Hints and Tips)	click the <b>Department</b> tab. Select the department. In the <b>Default Margin</b> field, type the % amount. Click <b>Save</b> .																	
3.	<p>Complete the following steps to add a department:</p> <ol style="list-style-type: none"> <li>a. Click the <b>Department</b> tab.</li> <li>b. Click <b>New</b>.</li> <li>c. In the <b>Code</b> field, type an alpha/numeric code to identify the department.</li> <li>d. In the <b>Description</b> field, type the name of the department.</li> <li>e. In the <b>GST Indicator</b> field, select the GST applicable to products in this department.</li> <li>f. Type a <b>Default Margin</b> if required.</li> <li>g. Select the <b>Print Labels</b> check box if required.</li> <li>h. Click <b>Save</b> if <b>Auto Save</b> isn't selected.</li> </ol> <p><i>*All other fields aren't used in this version; POS Dept is automatically assigned by the system.*</i>  <i>*See Hints and Tips.*</i></p>	  																
																		

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### Hints and Tips

- ✓ **Maintenance options:**
  - You can't **delete** a hierarchy if products are assigned to it.
  - If you **edit** codes/descriptions, they automatically update in the associated stock records.
  - Select the **Auto Save** check box to save as you type; it's cleared when you move tabs.
  
- ✓ **If you import supplier data,** they usually only host 'range'.
  - You can re-number the dep't and sub-dep't codes/desc.
  - You can add another dept. However, the products you move to it must keep the same hosted range, so you'll have to move the range to sit under the new dep't.
  - You can only use a range against one sub-dep't, otherwise products will be imported as unallocated, as it won't know which range to allocate it to.
  
- ✓ **Sub Range** is only used to group products that are the same variety of product & have the same size & price; e.g. Coke 1.25L \$2.20 & Fanta 1.25L \$2.20.
  - If you host Metcash data, create your own sub-ranges using letters for the code.
  - A sample product from the sub-range is listed against the sub-range; select the [+] to expand to see all products within the sub range.
  - Use the **Extended Desc** fields to add a description of the variety. This prints on tickets when the **Only Sub Range Items** filter is selected on the Items on Promotion Labels Wizard screen (and you select a ticket report that has these fields on it). Users can also edit and save-over the text in Labels Wizard.
  - If your business previously saved sub-range descriptions on the **Stock** screen in the **Ext Desc** fields, select **GetDesc From Stock** to import it as a starting point.

4. Complete the following steps to add a sub department:

- a. Click the **Sub Department** tab.
- b. Click **New**.
- c. In the **Code** field, type an alpha/numeric code to identify the sub department.
- d. In the **Description** field, type the name of the sub department.
- e. Select the **Department** that the sub department belongs to.
- f. Click **Save** if **Auto Save** isn't selected.

5. Complete the following steps to add a range:

- a. Click the **Range** tab.
  - b. Click **New**.
  - c. In the **Code** field, type an alpha/numeric code to identify the range.
  - d. In the **Description** field, type the name of the range.
  - e. Select the **Department** and the **Sub Department** that the range belongs to.
  - f. Click **Save** if **Auto Save** isn't selected.
- \*The **Percentage %** field isn't used in this version.\**  
*\*A range can only exist against one department.\**

6. Complete the following steps to add a sub range:

- a. Click the **Sub Range** tab.
  - b. Click **New**.
  - c. In the **Code** field, type an alpha/numeric code to identify the sub range.
  - d. In the **Description** field, type the name of the sub range.
  - e. In the **Ext Desc 1/2/3** fields, optionally type a description of the variety for tickets.
  - f. Click **Save** if **Auto Save** isn't selected.
- \*Most businesses keep sub-range stand-alone, and don't attach it to a **Range** (an error occurs if you try to); if your business does operate this way, it will be driven from your host file.\**

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## Hints and Tips

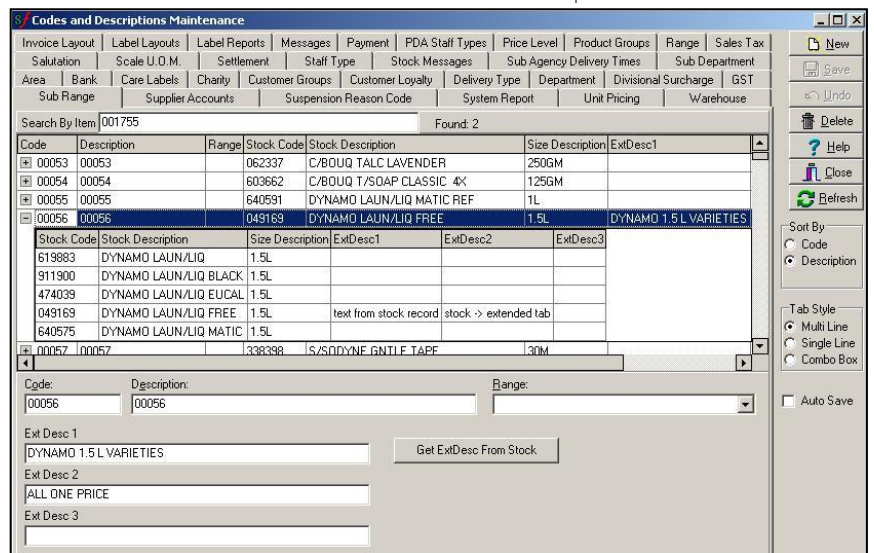
- ✓ Using the **Sub Range** grid:
  - A sample product from the sub-range is listed against the sub-range; select the [+] to expand to see all products within the sub range.
  - Use the **Search by Item** option to search for a sub-range in the list by EAN or stock code; the results filter the grid.
  - Use the **Extended Desc** fields to add a description of the variety. This prints on tickets when the **Only Sub Range Items** filter is selected on the Items on Promotion Labels Wizard screen (users can also edit and save-over the text in Labels Wizard).
  - If your business previously saved sub-range descriptions on the **Stock** screen in the **Ext Desc** fields, select **GetDesc From Stock** to import it.
- ✓ Run the **Reports -> Maintenance -> Sub Range Details** report to view a list of every EAN in a sub range.

Stock Code	EAN	Description	Size	Case Qty
022176	933077204382	BORGLO MEDIUM CHEROKEE YOGI	200GM	12
040444	933077204383	BORGLO MEDIUM CUSTUMBER	200GM	12
030047	933077204384	BORGLO MEDIUM CUSTUMBER	200GM	12
030050	933077204385	BORGLO MEDIUM CUSTUMBER	200GM	12
220706	933077204386	BORGLO MEDIUM CUSTUMBER	200GM	12
230442	933077204387	BORGLO MEDIUM CUSTUMBER	200GM	12
<b>Sub-Range: 00004 00004</b>				
030474	933077204388	BORGLO MEDIUM CUSTUMBER	200GM	12
030475	933077204389	BORGLO MEDIUM CUSTUMBER	200GM	12
030476	933077204390	BORGLO MEDIUM CUSTUMBER	200GM	12
030477	933077204391	BORGLO MEDIUM CUSTUMBER	200GM	12
030478	933077204392	BORGLO MEDIUM CUSTUMBER	200GM	12
030479	933077204393	BORGLO MEDIUM CUSTUMBER	200GM	12
030480	933077204394	BORGLO MEDIUM CUSTUMBER	200GM	12
030481	933077204395	BORGLO MEDIUM CUSTUMBER	200GM	12
030482	933077204396	BORGLO MEDIUM CUSTUMBER	200GM	12
030483	933077204397	BORGLO MEDIUM CUSTUMBER	200GM	12
030484	933077204398	BORGLO MEDIUM CUSTUMBER	200GM	12
030485	933077204399	BORGLO MEDIUM CUSTUMBER	200GM	12
030486	933077204400	BORGLO MEDIUM CUSTUMBER	200GM	12
<b>Sub-Range: 00006 00006</b>				

- ✓ Changes made in **Codes and Descriptions** are visible in the BOS:
  - immediately if made at store level
  - once HOST changes are imported from Head Office.

7. Complete the following steps to add sub-range promotional text:
  - a. Click the **Sub Range** tab.
  - b. Click the required sub-range; if required click **[+]** to view the products registered to this sub-range.
  - c. Select ONE of the following options:
 

To:	then:
type the text manually	in the <b>Ext Desc1, Ext Desc2, and/or Ext Desc3</b> fields, type the required text.
import text from <b>Ext Desc 1/2/3</b> fields on the Stock record	click the <b>Get Ext Desc From Stock</b> check box.
  - d. Click **Save** if **Auto Save** isn't selected.



8. Once finished, click **Close**.

