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SURE*fire*

PRO-1b	Page| 1 of 9
Category	Product
Course	Stock Records
Version	1.4
Client	Generic
Software	2.18.5.0

Stock Screen / Product Enquiry

Every product in SURE*fire* has a stock record.

Procedure to View a Stock Record

1.	From the BOS/HOS **Tools** menu, select **Stock Functions**, then **Stock**. *Or click the **Stock Maintenance** icon.*	

2.	**If:**	**then:**	
	you know the stock code	in the **Stock Code** field, type the stock code. Press **Enter** or **Tab**.	
	you know the item barcode	in the **EAN Code** field, type or scan the EAN barcode. Press **Enter** or **Tab**.	
	you need to search for the product	next to the **EAN Code** field, click 🔍 . Enter search criteria. *Select **Contains** to perform a multiple word search; it looks for the words anywhere in the field.* Select the **Stocked** & **Logically Deleted** filters as required. *The search starts automatically, & returns one EAN per UPP; select the **All EANS** check box to return all EANS for this item.* *Results display for the default supplier, unless a supplier is set.* *Optionally select **Advanced Search** for extra search options.* Click the required product, then click **Select** (or double-click the row).	

The item details are displayed.

Hints and Tips

- ✓ If you don't have access to the **Stock** screen, refer to the PRO-1j Stock Enquiry Read Only Fact Sheet.

- ✓ A stock record tells you a product's:
  - stock code/s
  - barcode/s
  - retail and cost price
  - deals/rebates, & promotions
  - department hierarchy.

- ✓ Note: Head Office users use the **HOS Pricing** function to manage pricing, deals, and promotions.

- ✓ **Summary Information Section**:
  - Values are for all EANs against the record, & GST inclusive.
  - Doesn't display on the HOS.
  - **AWC** is the average weighted cost; used for ordering, and updated off the invoice.
  - **Current supplier**: the default supplier.
  - **Stock On Hand:** the quantity of units that the system believes is in the store; displays N/A if the **Perpetual Stock** check box isn't selected.
  - **Sales** for the current week are in dollars, cost, & profit value.

🔧 Changes pending	There are scheduled changes that will be effective on the set date/time after system processes have run.
📋 Deal	A cost deal is active; only applies if less than the normal cost.
🔄 Promotion	A promotion is active; only applies if it's less than normal retail & **Price Update** has run.
🗑 Physically Deleted	The product can't be ordered or sold.
✓ Stocked	The product is ranged in your store.

Summary Information
Current Sell Price	2.55	Case Quantity 8	Sales for week 42.95
Current Margin	15.8017%	Current Cost Per Pack 2.1488	Cost 36.53
Current Unit Price	$1.28 per litre	Current Cost Per Case 17.1900	Profit 6.42
Current Supplier	COCA CO	AWC 2.1488	Stock On Hand 23.00
		Current Loyalty Points 2.55	GST Retail Perc 10%

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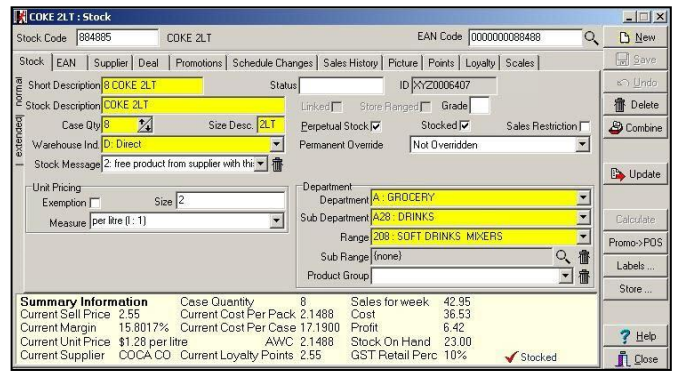**SURE**fire

PRO-1b *Page| 2 of 9*

Hints and Tips

✓ **Logically deleted supplier:**
- Can't be ordered from this supplier anymore.
- Deletes imported by HOST are set to logically deleted, and triggers a deleted ticket.

✓ **Physically deleted:**
- Product can't be ordered or sold anymore.
- A scheduled task runs nightly to remove physical deletes.

✓ **Function** buttons, if permitted:

Button	Description
New	Create a new record/event, depending on the tab you click **New** on.
Save	Save your changes.
Undo	Undo all changes since you last saved.
Delete	Mark the stock record, an EAN or a supplier for physical deletion, based on the tab performed.
UnDelete	Un –mark the product/EAN/supplier for physical deletion.
Combine	Link two stock records that should be a single record.
Move	Move a single EAN to another stock code.
Move All	Move multiple EANS to another stock code.
Update	send the 'current' price details to POS (once File Transfer & POS Import have run).
Calculate	Not used anymore.
Promo->POS	Send the active promotions for every product to POS; usually only used by Support.
Labels ...	Request an automatically generated ticket; print it from the **Labels Wizard** function.
Store ...	Not used anymore; use the **Tools** menu -> **Stock Functions** -> **SOH Enquiry** function.

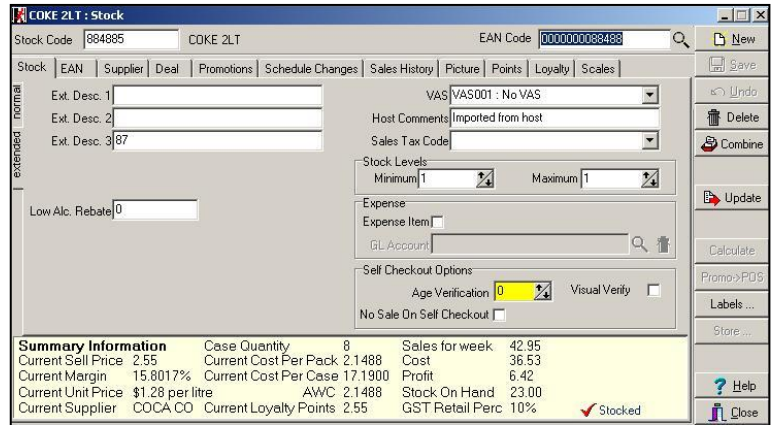| 3.	**To:**	**Refer to the:**
	check the default supplier for the product	**Stock** tab -> **Summary Information** -> **Current Supplier** field (description) OR **Supplier** tab -> **Default?** field is **'true'**.
	check if changes made by the store will be overridden by HOST import	**Stock** tab -> **Permanent Override** field. Refer to page 3 for a description of each option.
	view a **label location** saved against the product	**Stock** tab ->**Extended** tab; the location is stored in the **Ext. Desc 3** field. *Refer to the PRO-5c Set Label Locations (Mobile) Fact Sheet.*
	check if there is a **minimum order quantity**	**Supplier** tab –> **Min Order Qty** field.
	check when a **stock record** was **physically deleted**	**Stock** tab. *The date it was deleted is displayed.* Physically Deleted on 17/05/2011
	check when an **EAN** or a **Supplier** was **physically deleted**	**EAN /Supplier** tab. If there are multiple EANs/Suppliers listed, select the applicable one. *The date it was deleted is displayed.* Physically Deleted on 17/05/2011
	check when a **supplier** was **logically deleted**	**Supplier** tab. If there are multiple suppliers listed, select the supplier. *The date they were deleted is displayed.* Logically Deleted ☑ on 17/05/2011
	view the **deal** history *(excludes rebates created at Head Office)*	**Deal** tab. *Refer to the PRO-2c In-store Deals and Rebates Fact Sheet.*
	view the **promotion** history *(excludes discounts)*	**Promotions** tab. * Refer to the PRO-2e In-store Price Promotions Fact Sheet.*
	view a history of **scheduled changes** made *(excludes deals, discounts and promotions)*	**Schedule Changes** tab. *Refer to the PRO-2b In-store Schedule Changes Fact Sheet.*
	view a weekly history of **sales** for the EAN	**Sales History** tab. *Refer to page 8 for field definitions.*
	view the **loyalty points promotion** history	**Points** tab. *Refer to the PRO-2f In-Store Points Promotion Fact Sheet.*
	check active **loyalty pricing**	**Loyalty** tab. *Refer to page 9 for field definitions.*
	view **scales data** for weighted products	**Scales tab.** *Refer to the PRO-1d Maintain Scales Data Fact Sheet.*
4.	Click **Close** when finished.	Close
		❑

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SUREfire SYSTEMS

PRO-1b *Page| 3 of 9*

Stock Tab – Normal

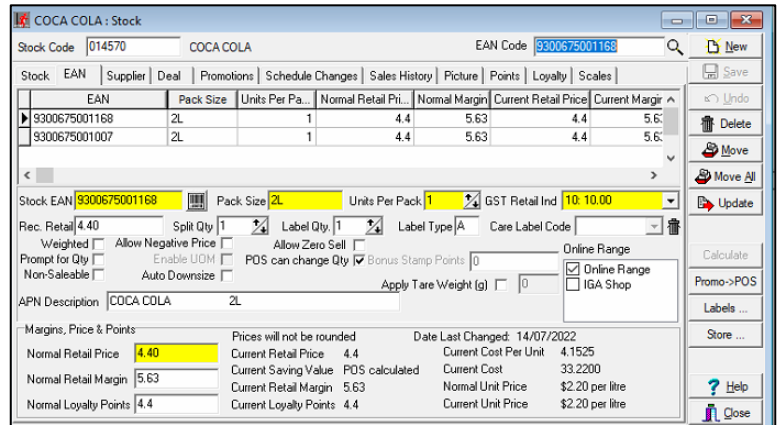| Field	Description
Short Description	The text that may display on some of your tickets.
Stock Description	The text that displays on the POS, receipt, and tickets.
Case Qty	The number of units in each case ordered from the default supplier. If there are multiple suppliers for this product, it's recommended that you use the **Supplier** tab.
Size Desc.	The <u>individual</u> size of the product, or the quantity contained within one selling unit of the product. *E.g. weight, fluid measurement, quantity per selling pack; 50g, 50ml, 2LT, EA, 6PK.*
Warehouse Ind.	The source of the product. E.g. Warehouse, Direct.
Stock Message	A message that displays at POS for the operator; e.g. product recall, restricted sale products. *Refer to the TECH-2h - Configure Stock Messages Fact Sheet.*
Unit Pricing	Stores of a certain size must display the price of certain products as a standard unit of measurement. Select **Exception** if unit pricing doesn't apply for this product. *Refer to the ACCCC's Unit Pricing: a Guide for Grocery Retailers.*
ID	A unique autogenerated 10-digit code (includes up to a 4-digit prefix). Read-only. Used by retailers who also have an online store. Refer to TECH-1h - Configure a Unique Identifier for Stock Items.
Status	Some organisations use status codes to define whether the product is available to order &/or sell.
Linked	Indicates that this stock code has been combined with another record using the **Combine** function.
Store Ranged	Some organisations stock some products in particular stores but not in other stores; when selected, this indicates that this store does stock the item.
Grade	Some organisations grade the quality of products; store profiles are used for ordering.
Perpetual Stock	Means you manage inventory for this item; the **Stock On Hand** field lists a value instead of 'N/A'.
Stocked (BOS)	Indicates that the product is part of your range; is automatically set if it's receipted and invoiced. Scheduled changes tickets are usually configured to only print for stocked products. Go to **System** -> **System** -> **Properties** -> **Item** tab to set POS and BOS rules for non-stocked lines.
On Hold (HOS)	Indicates that this product record/changes made won't be sent to stores when HOS Export runs. This can be configured to be automatically set for new lines hosted into the HOS.
Sales Restriction	Stops all EANs from being sold at POS, such as recall items. A message is displayed '*Item is not for sale. Do not place item back on shelf for selling. Enter Supervisor ID to override item restriction.*'
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 [$0.00]): **IMPORTANT: Overrides are only applied if your system is configured to review this setting.** **Not Overridden**: apply all changes imported; usually set for non-HOS driven stores. If an **Override** is selected, all details are imported except for the selected override; e.g. **Override margin** will keep existing margin, & apply all other changes (usually set for HOS driven stores).
Department and Product Group	The **Department** hierarchy that the product is reported against. A **Product Group** is a code assigned to products from the same manufacturer (e.g. Arnott's may be 02-arnotts). Used in HOS rebates, and reporting. The host supplier file can include this information. *See TECH-4b Configure Department Hierarchies & TECH-4e Configure Product Groups Fact Sheet.*

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SUREfire

PRO-1b *Page| 4 of 9*

Stock Tab – Extended

Field	Description
Ext. Desc 1 and 2	Extra text to print on promotional tickets. From v2.14 this is not usually used, as sub range descriptions for variety tickets can be entered in **Tools** -> **Codes and Descriptions** (the description only prints if the label template looks up field/s).
Ext. Desc 3	Records the label location of the product in the store. Also reported on the Reports | Stock | SOH Negative by Aisle/Bay Report (but only lists products that have a negative SOH value)
Low Alc Rebate	Used by alcohol wholesalers to record the rebate that is available for a low alcohol-content product.
VAS	Populated if there are taxes other than GST associated with this product, such as 'wet' tax on liquor products. Also applied to value-added products that are sold by service providers, such as InComm and Epay gift cards and mobile recharge vouchers. This flag also tells POS to connect to the interface provider to validate and activate the product.
Host Comments	Auto-populated by the Host file. e.g. Imported from host
Sales Tax Code	Populated if there are taxes other than GST associated with this product; e.g 'WET' tax for liquor.
Stock Levels Min and Max	These values are not used anywhere in SUREfire.
Expense	Selected if this is an expense item e.g. carrier bags; Only the EAN and Supplier tabs apply, all other tabs are hidden. You can record the applicable **GL Account** expense code. Note: SUREfire doesn't support any General Ledger.
Self Checkout Options	**Age Verification**: prompts for attendant intervention to check if the customers age **Visual Verify**: prompts for attendant intervention to confirm all parts of the product are correct. **No Sale On Sale Checkout**: this product can't be sold on self checkout; e.g. the attendant may not meet age requirements to sell this product (such as liquor).

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EAN Tab

Lists each EAN saved against the same stock code, and the attributes of the selected EAN.

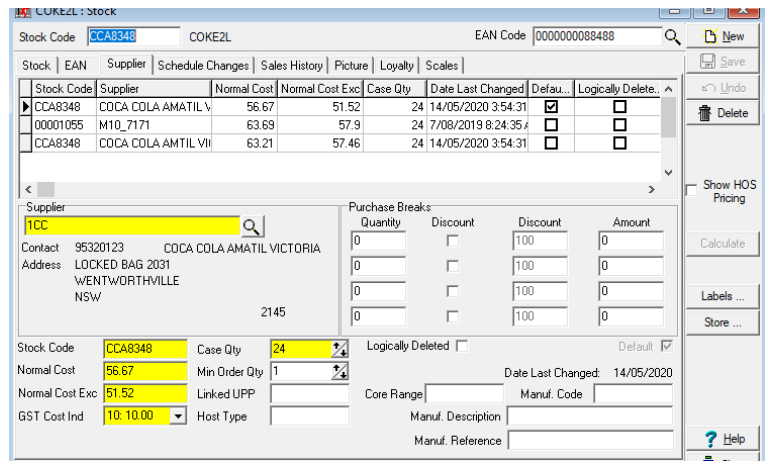| Field	Description
Stock EAN	The 13-digit (or 12-digit and 1 check-digit) barcode on the packaging of the product or the carton, or on the delivery box (a scannable TUN barcode is 14 digits long). An **EAN** is unique to the product. EANs are listed on the same record, so that all stock movements against the product will correctly adjust the SOH value of the combined product. TUNs get added via Receipting on WebRF (if enabled in **System | Properties | System** tab), with the associated case quantity, UPP, and a retail of $0.00; they automatically scan at POS, so remember to set an **APN Description** and a **Retail Price** that reflects that you are selling the box/case quantity. If you need to sell 'instore non-TUN boxes', refer to PRO-1c Maintain a Stock Record Fact Sheet.
Pack Size	The quantity that the product is sold in; displays on tickets. E.g. 2KG, 150g, 1L, 6PK.
Units Per Pack	The number of units SOH will reduce by E.g. a beer slab is [6] units, a toilet rolls 6pk is [1] unit.
Apply Tare Weight	To record the weight of the packaging of a non-deli weighted product (e.g. a mushroom bag that mushrooms are packaged in); it's subtracted from the total weight when the product is weighed on the POS scales. Enter the weight (in grams), or set a default weight in the **System** menu | **Properties |Parameters** tab. The scales used to weigh deli products already factors in packaging.
Rec Retail	The recommended retail price for this product. It's not necessarily the normal retail. Is usually only imported once, when the product file is created during implementation of SUREfire.
Split Qty	No longer used.
Label Qty	The default number of tickets that will print during a ticket request.
Label Type	The default type of ticket that will print in Labels Wizard. [A] = shelf ticket [B] = promotional ticket [Q] = quaint ticket (spices etc)
Care Label Code	A label attached to the product that includes warning/recommendation to the customer about the product; e.g. safety information, washing instructions. The code for the applicable care label is imported from the HOST file; the label text for each code is stored in the **Codes and Description** function, and is printed when the user selects care label ticket stationary during a ticket request.
Weighted	If selected, inventory and reporting will be in kilos; the system looks at the embedded price and reverse calculate the kilos sold. Usually selected if you order the product in kilos. It prompts the operator to put the product on the deli scales or on the POS scales if it's not a price embedded barcode
Allow Negative Price	If selected, you can type a [-] in the EAN field to sell this product at a negative price; e.g. -$1.00. A price change is not allowed at POS for negative priced products.
Enable UOM	Not used. Refer to the **Scales** tab.
Date Last Changed	Indicates the date which the product details were last changed (by user or imported).

Field	Description
POS can change Qty	Currently not available.
Prompt for Quantity	If selected for a specific EAN, prompts the POS operator to enter the quantity after it's scanned/entered in a sale transaction. Note: this disables the **Weighted** check box. *This is useful for fruit and veg lines sold as 'each' not by weight, to stop operators assuming it's weighted and not capturing the quantity sold.*
Non Saleable	If selected for a specific EAN, prevents the sale of that EAN at POS; a generic message is displayed *'Product is not for sale. Contact your supervisor. Press any key to continue'*. The EAN can still be used in PLU Lookup at POS, and for all inventory tasks. Note: if the **Sales Restriction** check box is selected on the **Stock** tab, then all EANs will be restricted (it overrides the **Non-saleable** check box). *A specific message can be configured in **POS Config** -> **Messages** tab.*
Auto Downsize	Used to allow a discount (ie. 10% off 6 bottles of wine) to apply even if a TUN code for the eligible product is scanned. It eliminates the need to add the TUNs into the discount Item Group. When a case (TUN barcode) is added to the POS Item Menu screen, it will display the QTY as 1 with the price of the case. When Process Payment or Cash Payment is selected, the POS will change the Qty to 6 before any discounting is applied and the payment menus are shown.
GST Retail Ind	The GST rate that will be charged to the customer. Zero indicates that no GST applies.
APN Description	Use this to add an alternative product description for ticketing (i.e. that includes pack size, which Metcash v7 don't include in their hosted Stock Description). You can select an option in Label Wizard to print the APN Description on a ticket batch (it falls back to Stock Description if a product doesn't have an APN Desc). Metcash only host APN Desc. in an initial load and for new lines. POS automatically shows **APN description** instead of **Stock Desc**, if it's populated for a selected EAN/TUN (there is no config required).
Normal Retail	The regular sell price of the product. $0.00 will prompt the operator to enter the price at POS.
Current Retail Price	The price that this EAN is currently being sold – reflects the active promotion price if it's cheaper than the normal retail price.
Normal Retail Margin	For a given retail price, the percentage of the profit dollars (margin dollars) that is a dollar profit to the business. Calculated as Retail price – ([Per Unit Cost] / Retail price); retail minus unit cost gives the dollar margin. SUREfire uses retail margin, not gross profit.
Current Retail Margin	Current Retail price – ([Per Unit Cost] / Current Retail price). Reflects any active promotions and deals.
Normal Loyalty Points	Applies if your business runs a loyalty points reward program, this is the normal amount of points you are giving for the product; default is one point per $1.00 (set in POS Config).
Current Loyalty Points	The points currently being awarded to this EAN; based on an active loyalty promotion entered on the **Loyalty** tab (or in **HOS pricing**).
Current Cost Per Unit	The unit cost for the product, based on the current cost of the product divided by the UPP.
Current Cost	The current cost of the product per case – reflects any off invoice deals.
Normal Unit Price	The normal price of the product based on the standard unit of measurement selected on the **Stock** tab. N/A displays if **Exception** has been selected for unit pricing.
Current Unit Price	The current price of the product based on the standard unit of measurement selected on the **Stock** tab. N/A displays if **Exception** has been selected for unit pricing.

- **Prices will not be rounded** means that POS doesn't round the amount e.g. $1.98 will display on the receipt as $1.98.
- **Price will be rounded** means that the department this product belongs to has rounding rules applied (configured for the department in the **Tools** menu -> **Rounding Rules** function, and the **Codes and Descriptions** function). E.g. there may be a rule to always round-down prices that end in .99 to .98; typing $1.99 will automatically change it to $1.98 on the stock record.
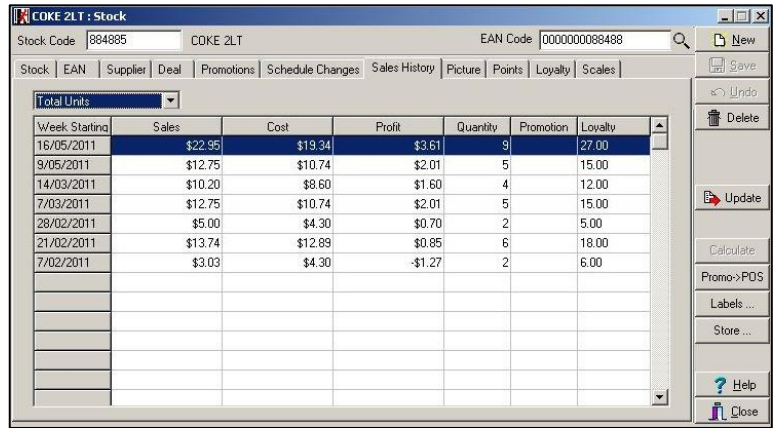
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SUREfire SYSTEMS

PRO-1b *Page| 7 of 9*

Supplier Tab

Lists each supplier saved against the same product, and the attributes of the selected supplier.

Field	Description
Supplier	The code your store uses for the supplier that you order this product from. Their contact details are auto-populated from their AP record.
Stock Code	Used to order the product from the supplier; each supplier may have a different Stock Code that links that product to them.
Normal Cost	The <u>case</u> cost (GST inclusive) from the supplier. If set to $0.00, the system calculates a cost for reports using the department default margin % of the sale price (set in Codes and Descriptions).
Normal Cost Exc	The <u>case</u> cost (GST exclusive) from the supplier.
GST Cost Ind.	The GST rate that applies to the product at cost. *Zero indicates that no GST applies.*
Case Qty	The number of units in each case ordered from the supplier. If you change the Case Qty for the default supplier, the **Case Qty** field on the **Stock** tab is updated.
Min Order Qty	The minimum number of units that must be ordered; an error will display if you try to order less.
LinkedUPP	Provides validation that you have linked two stock codes together correctly, as it will show the UPP of the EAN that will be ordered. This field is auto-populated after using the Combine function.
Manufacturer Code	The code for the manufacturer (source supplier) who supplies this product into the supplier's warehouse/DC. This will be hosted for Metcash V7 hosted lines.
Manufacturer Description	The name of the manufacturer or brand. This can be entered onto an automatic order, to restrict the suggested order to only products from the entered supplier/department/ brand.
Manuf. Reference	The source suppliers code for this product. It is called the Supplier Item Code in the XML file. Knowing this code lets you contact and order direct from the manufacturer, rather than Metcash. Your business can force each ref to be unique in surefire (system param AllowDuplicate MenufRef)
Purchase Breaks	Each supplier can provide up to four quantity breaks (discounts) if you purchase in bulk; the purchase breaks are displayed on the BOS purchase order screen for reference.
Logically Deleted	Indicates that the product can't be ordered from this supplier anymore; is manually selected or set by HOST import. You can configure the system to flag logically deleted suppliers for physically deletion after a certain number of days. *Refer to the PRO-1f Logical and Physical Deletion Fact Sheet.*
Default	Indicates that this supplier is the default ordering supplier ('True'); 'False' is displayed against all other suppliers listed. There can only be one default supplier; if you select the default check box against another supplier, they become the default supplier ('True'). Note: In a HOS, the default supplier is set in HOS Pricing (as there may be a different default for each zone); the default selected on the Stock record is only used for reports that use this filter.
Date Last Changed	The date that changes were either manually or imported on this tab.

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PRO-1b *Page| 8 of 9*

Sales History Tab

Lists the weekly sales history of the selected UPP (units per pack) or EAN since it was first sold (unless older sales history is purged). A week isn't listed if there were no sales during that week.
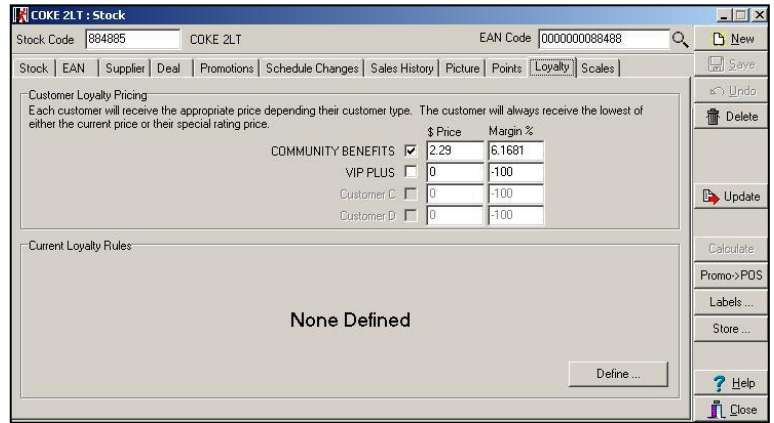
If there are multiple EANs with the same UPP, you will need to change the one currently selected on the **EAN** tab to review sales just for this packaging.

Field	Description
Sales	The total dollar value of sales (includes promotional).
Cost	The total cost of the sales.
Profit	The total gross profit (retail minus cost) earned from the sales.
Quantity	The number of units sold.
Promotion	The promotion code for a promotion effective for this EAN during the week.
Loyalty	The total value of loyalty points awarded for this EAN.

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PRO-1b *Page| 9 of 9*

Loyalty Tab

Lists the active loyalty promotions for the product; these are created on the Promotions tab.

It's not recommended to edit pricing on this tab, as the price won't revert back to the normal price once the loyalty promotion ends.

Field	Description
Customer level	A maximum of four alternative customer pricing levels can be active at any time. A customer only receives the promotion if they either present a card linked to the price level, or have an AR account linked to the price level. If a customer is eligible for two price levels, they'll receive the one that's the cheapest price. *Refer to the TECH-4d Configure Special Customer Pricing Fact Sheet.**
$ Price	The loyalty promotion retail price.
Margin %	The current margin using the loyalty price ([$ Price – Current Cost per unit] / $ Price).
Current Loyalty Rules	This is no longer used; use the Discount Wizard application.