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Category	Product
Course	Stock Records
Version	1.2
Client	Generic
Software	2.18.5

# Maintain a Stock Record

Every product and POS Quick Item button in SUREfire has a stock record. If your business is Head Office managed, check what information can be changed at store-level.

**Hints and Tips**

- ✓ Note: Head Office users use the **HOS Pricing** function to manage pricing, deals, and promotions.
- ✓ If you change the **UPP** or **department hierarchy**, any deals/promotions that were set up using this 'affect' are removed once daily tasks run, as they no longer apply.

✓ **Function** buttons, if permitted:

	Create a new entry, depending on the tab you click <b>New</b> on.
	Save your changes.
	Undo all changes since you last saved.
	Mark the stock record, an EAN, or a supplier for physical delete.
	Un-mark the entry for physical deletion.
	Link two stock records.
	Move a single EAN to another stock code.
	Move multiple EANs to another stock code.
	Send the 'current' price details to POS (once File Transfer & POS Import have run).
	Not used anymore.
	Send the active promotions for every product to POS; usually only used by Support.
	Request an auto generated ticket; print it from the <b>Labels Wizard</b> function.
	Not used anymore; use the <b>Tools</b> menu -> <b>Stock Functions</b> -> <b>SOH Enquiry</b> function.

- ✓ There can be only one **default supplier** for a product.


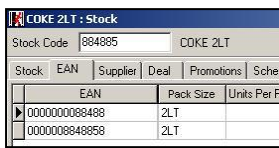
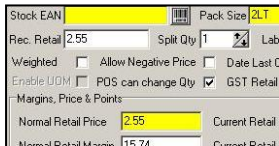


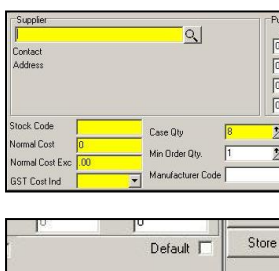
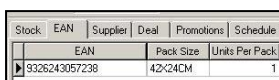
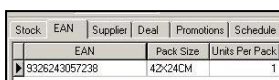
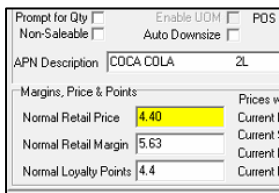

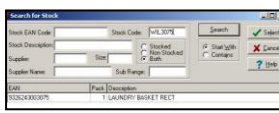
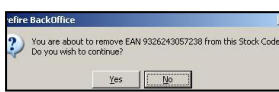
**Procedure to Maintain a Stock Record**

1.	From the BOS/HOS <b>Tools</b> menu, select <b>Stock Functions</b> , then <b>Stock</b> . <i>*Or click the <b>Stock Maintenance</b> icon.*</i>															
2.	In the <b>EAN Code</b> field, type, or search for, the EAN that you want to edit. <i>*Alternatively, in the <b>Stock Code</b> field, type the stock code.*</i>															
3.	Press <b>Enter</b> or <b>Tab</b> if you typed the code. <i>*The product details are displayed.*</i>															
4.	<table border="1"> <tr> <td><b>To:</b></td> <td><b>then:</b></td> </tr> <tr> <td>edit a field</td> <td>overtyping the existing entry. Click </td> </tr> <tr> <td>add a stock message that displays at POS for the operator</td> <td>click the <b>Stock</b> tab. Select the <b>Stock Message</b>. Click  <i>*Refer to the <a href="#">TECH-2h Configure Stock Messages at POS Fact Sheet</a>.*</i></td> </tr> <tr> <td>add a picture of the product (can be used on a ticket report template)</td> <td>click the <b>Picture</b> tab. Right-click and select <b>Add</b>. Navigate to and select the required saved image. Click <b>Open</b>. Click <b>Save</b>.</td> </tr> <tr> <td>change the default ordering supplier</td> <td>click the <b>Supplier</b> tab. Select the supplier who will be the new default supplier. Select the <b>Default</b> check box. Click </td> </tr> <tr> <td>change retail, cost, or margin</td> <td>refer to the <a href="#">PRO-2a In-store Immediate Price Changes Fact Sheet</a>.</td> </tr> <tr> <td>change scale data</td> <td>refer to the <a href="#">PRO-1d Maintain Scales Data Fact Sheet</a>.</td> </tr> </table>	<b>To:</b>	<b>then:</b>	edit a field	overtyping the existing entry. Click	add a stock message that displays at POS for the operator	click the <b>Stock</b> tab. Select the <b>Stock Message</b> . Click <i>*Refer to the <a href="#">TECH-2h Configure Stock Messages at POS Fact Sheet</a>.*</i>	add a picture of the product (can be used on a ticket report template)	click the <b>Picture</b> tab. Right-click and select <b>Add</b> . Navigate to and select the required saved image. Click <b>Open</b> . Click <b>Save</b> .	change the default ordering supplier	click the <b>Supplier</b> tab. Select the supplier who will be the new default supplier. Select the <b>Default</b> check box. Click	change retail, cost, or margin	refer to the <a href="#">PRO-2a In-store Immediate Price Changes Fact Sheet</a> .	change scale data	refer to the <a href="#">PRO-1d Maintain Scales Data Fact Sheet</a> .	    
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**Hints and Tips**

- ✓ Combine two stock records that should be a single record (usually for multiple selling units; e.g. coke single and slab).
- ✓ **Add an EAN:**  
You add an EAN to an existing record, rather than create a new stock record, if :
  - the EAN is a different selling multiply of the same product ordered; e.g. a pack & a carton of cigarettes, or a single can or slab of coke
  - product packaging changes and the UPP stay the same.
 All stock movements against the product will correctly adjust the SOH value of the combined product.
- ✓ **Add a Supplier**
  - Try and use the **stock code** that will display on the supplier order invoice.
  - An error is displayed if you try to enter a **stock code: supplier** combination that already exists on another record. You probably need to move that stock code to this one.
- ✓ **Move EANS:**
  - Move an EAN when the supplier has allocated it a new stock code, or to clean up bad data.
  - The host/supplier import file may be configured to automatically do this task.
  - If there's an EAN on the new record that has the same UPP, then the moved EAN's retail, cost, margin, and retail GST are changed to match.
  - All historical sales of the EAN are moved.
  - If all EAN's are moved, SOH is also moved to the new code.
  - If all EAN's are moved, one is left on the old stock record, set to \$0.00 & preceded with an 'M' e.g. M326243057238. You must physically delete this EAN if you want to remove the entire product record.







5.	<p><b>To:</b></p> <p>combine two stock records</p>	<p><b>then:</b></p> <p>refer to the <a href="#">PRO-1e Link Stock Codes Fact Sheet</a>.</p>	
	<p>add another EAN to this stock record</p>	<p>click the <b>EAN</b> tab.</p> <p>If there's more than one existing EAN, select the EAN to base the new one on.</p> <p>Click .</p> <p>In the <b>Stock EAN</b> field, type the barcode of the product.</p> <p>Edit any field/s as required.</p> <p>Click <b>Save</b>.</p> <p><i>*If a HOS user, open <b>HOS Pricing</b> to set <b>Retail Price</b>.*</i></p>	 
	<p>add another supplier to this stock record <i>(an AP record must exist for the supplier)</i></p>	<p>click the <b>Supplier</b> tab.</p> <p>Click .</p> <p>In the <b>Supplier</b> field, type, or search for, the supplier code.</p> <p>In the <b>Stock Code</b> field, type the products' ordering code.</p> <p>In the <b>Normal Cost</b> field, type the <u>case</u> cost GST inclusive.</p> <p>Select the <b>GST Cost</b> rate.</p> <p>Select the <b>Case Qty</b>.</p> <p>Enter any optional fields; select the <b>Default</b> check box if this is the new default supplier.</p> <p>Click <b>Save</b>.</p>	  
	<p>Add an alternative description for tickets i.e. to include pack size to print on tickets</p>	<p>Click the <b>EAN</b> tab.</p> <p>In the <b>EAN Description</b>, type the applicable text.</p> <p>Click <b>Save</b>.</p> <p><i>*EAN Description is only hosted by Metcash on an initial load and new lines.*</i></p> <p><i>*You can opt to use this description when you print tickets in Labels Wizard.*</i></p>	 
	<p>move an EAN to a different stock code <i>(the other stock code record must already exist)</i></p>	<p>click the <b>EAN</b> tab.</p> <p>Select the EAN to move.</p> <p>Click either <b>Move</b> to move a single EAN, or <b>Move All</b> to move all EANs.</p> <p>Search for the stock record you want to move the EAN/s to; highlight it &amp; click <b>Select</b>.</p> <p>Click <b>Yes</b> to continue.</p> <p>Click <b>OK</b>.</p>	  



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**Hints and Tips**

- ✓ If you need to **split a stock code** from a stock record you must first rename the stock code; SUREfire doesn't let you add a stock code for the supplier if it already exists.

5.	<p><b>To:</b></p> <p>split a stock code and EAN from an existing stock record (E.g. if you linked the wrong product or to clean up incorrect data)</p>	<p><b>then:</b></p> <p>click the <b>Supplier</b> tab.</p> <p>Change the <b>Stock Code</b> that you want to split. <i>*E.g. add a [D] at the start of the code.*</i></p> <p>Create a new stock record for the stock code you want to split; add a dummy EAN.</p> <p>Use the <b>Move</b> function to move the applicable EANs to the new stock record. <i>*Refer to the Move function on the previous page.*</i></p> <p>Delete the dummy EAN that you created; select the EAN and click .</p> <p>Delete the old stock code that you renamed; select the stock code and click .</p> <p><i>*The deleted EAN and stock code are removed once the physical deletion utility runs.*</i></p>	
6.	<p><b>If:</b></p> <p>a head office (HOS) user</p> <hr/> <p>a store (BOS) user</p>	<p><b>then:</b></p> <p>the changes for products not 'on hold' will be sent to stores when <b>HOS Export/Import</b> runs.</p> <hr/> <p>select one option:</p> <ul style="list-style-type: none"> <li>• click <b>Update</b>, OR</li> <li>• run <b>Price Update</b> to apply several records, OR</li> <li>• or let the automatic update apply it.</li> </ul>	  
7.	Click  when finished.		