
Stock Tagging

Stock tagging is a facility that allows stock items with similar attributes to be isolated for either reporting or updating. The mass update facility within Stock Tagging has a multitude of uses including mass changing of a price point, mass changing of a supplier or mass changing of a category, genre or department. Stock Tagging may also be useful for generating reports such as a 'Request For Return' for SOR or SOE product or stock with bulk quantities that aren't moving. Stock Tagging can also be used for finding and fixing anomalies within your stock file such as items with negative stock on hand or gross profit or items without a barcode number.

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Creating A Tag List

Steps to create a tag list:

1. Input a valid Operator ID.
➤ The transaction indicator will display SALE and the Control Menu will change to the Main Menu.
2. Select Alt S Stock from the Main Menu
3. Select F9 from the Stock Menu and then Alt A Add.
➤ There are three tabs to input and select information, General, Ranges and Special.
4. Input a description for the tag list on the General tab.
5. Input and/or select required parameters on all three tabs.
➤ When selecting the parameters, each field selected narrows the result, e.g. if a particular supplier is selected and a retail price range is selected, then only items with that supplier and within that retail price range will be tagged.
6. Select OK or enter to save chosen parameters.
7. Select Alt T Tag to commence the search.

Tagged Stock
General | Ranges | Special

Description:

Operator:

Creation Date: Days To Keep: Expiry Date:

Department:

Category: CD Singles

Supplier: WARNER MUSIC

Genre:

Purchase Type:

Cat. No Prefix:

Manual Control:

Tagged Stock
General | Ranges | Special

Stock on Hand:

Stock on Order:

Minimum SOH:

Cost Price:

Retail Price:

Gross Profit %:

Acquisition Date:

Last Sale Date:

Last Receipt Date:

Alarm Date:

Loyalty Points %:

Use Cost Price:
 Item
 Average
 Last

Use Retail:
 Price 1
 Price 2

OK Exit

Tagged Stock
General | Ranges | Special

Duplicate Titles: (Match on title/artist/catalogue)

Unused Items: (BOH zero and no history)

Minus Stock: (BOH less than zero)

Zero Acquisition Date: (Products with no acquisition date)

Unmatched Cat. Nos.: (Catalogue no different to database)

Value Only: (Items Marked as Value Only)

POS Message: (Items with a POS Message)

Blank Barcode: (Blank Barcode)

Invalid Barcode: (Less Than 13 Digits or Invalid Check Digit)

Duplicate Cat. Nos.: (Match on Supplier/Catalogue Number)

Tax Free: (Items with any tax free component)

Consignment: (Items with Stock Method of Consignment)

Agency: (Items with Stock Method of Agency)

Stock Take: (Items flagged for partial stock take)

No Discount: (Items flagged as not discountable)

Blank Cat. No.: (Blank Catalogue Number)

OK Exit

General Tab

Description

Input a description for this tag list. This does not form part of the search parameters, simply a description so that you may distinguish this list from any other.

Operator

Input your operator ID to record who created this list.

Creation Date

The current date is automatically inserted as you tab past this field.

Days To Keep

Number of days to retain the tag list before automatic deletion.

Expiry Date

Linked to *Days To Keep*, displays the date that the tag list will be deleted.

Department, Category, Supplier, Genre, Purch. Type

Search parameters, select from each field to narrow the search, leave each or any field blank to include all of that area, e.g. If the required items are across multiple suppliers, leave the supplier field blank.

Cat. No Prefix

Search parameter, if the required items' catalogue numbers all commence with the same prefix, input that prefix here, e.g. MUSH will find all product with a catalogue number commencing with MUSH.

Manual Control

Check to allow manual inclusion of items from Stock Browse. See later in this section for full instruction.

Ranges Tab



Each parameter has a 'from' and 'to' field, either field may be left blank to select 'all to' or 'all from'. Leave both fields blank if that parameter is not required.

Input 'from' and/or 'to' requirements on any or all of the available parameters.

Special Tab

The selections on this tab are designed to find specific errors or items requiring maintenance. Many of these would be performed on advice from the WinSTORE help desk, although no detriment will be done should you perform any of these without advice.

Duplicate Titles

Select to find all duplicate items based on title, artist and category.

Unused Items

Select to find all items that have a zero SOH quantity and no movement history.

Minus Stock

Select to find all items that have a negative SOH quantity.

Zero Acquisition Date

Select to find all items that have a blank acquisition date field.

Unmatched Cat. Nos.

Select to find all items that appear in your stock file but do not appear in your catalogue.

Value Only

Select to find all items that are marked as Value Only.

POS Message

Select to find all items that have a message appearing when input at POS.

Blank Barcode

Select to find all items that have a blank barcode field.

Invalid Barcode

Select to find all items that have an invalid barcode.

Duplicate Cat. Nos.

Select to find all items that are duplicated, i.e identical supplier and catalogue number.

Tax Free

Select to find all items that have an amount in 'Tax Free'.

Consignment

Select to find all items that are set as Consignment.

Agency

Select to find all items that set as Agency.

Stocktake

Select to find all items that flagged fro Stocktake.

No Discount.

Select to find all items that set to No Discount.

Blank Cat. No..

Select to find all items that have a blank Catalogue Number.

Creating A Manual Tag List

A manual tag list is when there is no obvious similarity between the items to select and therefore no parameters can be set.

Steps to create a manual tag list:

1. Input a valid Operator ID.
 ➡ The transaction indicator will display SALE and the Control Menu will change to the Main Menu.
2. Select Alt S Stock from the Main Menu
3. Select F9 from the Stock Menu and then Alt A Add.
4. Input a description for the tag list and select Manual Control on the General tab.
5. Select OK or enter to save.
6. Select Alt X Exit.
7. Select Alt S from the Main Menu and then F2 Browse Stock from the Stock Menu.
8. Browse through your stock list to find the first item to tag, select Alt T Tag.
9. Highlight the Tag List that you created for this list and select Alt S Select.
10. Continue browsing stock and selecting Alt T Tag for each item required.

Viewing Tagged List

After creating the tag list, the tagged items may then be viewed by selecting Alt V View.

The items are displayed in three columns, Artist, Title and Stock ID.

There are several options available by selecting the appropriate action.

Artist	Title	ID
10, BOB MARCIACS	LOVE AMONG THE RUINS	CD21498
ELASTICA	ELASTICA / CAR SONG	CA17453
FOO FIGHTERS: HW	FOO FIGHTERS: HW HERO	DS21822
GUNS & ROSES: US	GUNS & ROSES USE YOUR ILLUSION	CD19421
HOODLUM	HOODLUM	CD19415
JDOL, BILLY	JDOL SONGS - 11 OF THE BEST	CD28859
JUDICI: SHOW PAR	JUDICI: SHOW PARTY AFTER HOTEL	CD21493
LEANN WORNACK	LEANN WORNACK	CD19413
RICHARD, CLIFF	PRIVATE COLLECTION	CD17384
THE END OF THE	THE END OF THE INNOCENCE	CD23516

Action Buttons:

- | | |
|------------------|---|
| Alt T Toggle | Select to exclude an item from a following mass update. |
| Alt O Order Item | Select to place the highlighted item into Place Orders to be ordered. |
| Alt V View | Select to view the item details. Use the arrow up/down to view each item in turn. |
| Alt A Order All | Select to place all items in the list into Place Orders to be ordered. (Any items 'Toggled' will not go to Place Orders.) |
| Alt P Print | Select to print the list. * See below for more details |
| Alt U Update | Select to apply a mass update to items in this list.
* See later in this section page for more details |
| Alt E Export | Select to export this list to a text (.TXT) file for use with another application, e.g. Microsoft Excel. |
| Alt D Delete All | Select to mass delete all the listed items from your system
** WARNING: This action is irreversible ** |
| Alt S Stocktake | Select to mark list as are part of a partial stocktake.
*Refer to Stocktake Procedures for further information. |
| Alt X Exit | Exit back to the previous screen. |

Printing Options *

After selecting Alt P Print, a selection box opens for style of report presentation.

Select one option from each of the two option areas.

Mass Updating

After creating the tag list, the tagged items may then be updated by selecting Alt U Update. To exclude any item in the list from the update select Alt T Toggle on that line prior to selecting Alt U Update.

Enter only the field(s) that you wish to alter, leave all other fields blank.

The three cost fields may be used in several different ways.



- Enter an actual dollar figure.
- Set to a percentage of Retail Price. E.g. To reset the cost prices of these items to show a GP% of 31.1, enter **-31.1%** into the appropriate (or all) cost fields. The update process will calculate the new cost price for each item based on each retail price.
- Set to equal one of the other cost fields. E.g. To reset the average cost of each item to equal each item price enter **=ITEM** into the Average Cost field or alternately to reset the item cost to equal the average cost enter **=AVG** into the Item Cost field. You may use =ITEM, =AVG or =LAST in any of the opposing cost fields.

Align Cat. Numbers	Select to update the catalogue number to align with the number within the catalogue data.
Change ID	Select to update the category ID, e.g. To change items incorrectly created as CD (Compact Discs) to DS (CD Singles).
Clear Alarm Dates	Select to clear all alarm dates for the items.

Examples

Find all Sony \$18.95 CD's that are out of stock and put them into Place Orders to be reviewed for ordering.

Steps:

1. Input a valid Operator ID.
 - The transaction indicator will display SALE and the Control Menu will change to the Main Menu.
2. Select Alt S Stock from the Main Menu
3. Select F9 from the Stock Menu.
4. Select Alt A Add.
5. Input into the description field 'Sony Nice Price CD's'.
6. Tab to the Category field and select CD.
 - When moving through fields on any WinSTORE screen it is recommended that you use the tab key on the keyboard rather than clicking with the mouse. This ensures that all fields that are automatically input are not missed.
7. Tab to the Supplier field and select SMA.
8. Select Alt R Ranges to change to the Ranges tab.
9. Input '0' into the SOH From field and '0' into the SOH To field.
10. Tab to Retail and input '18.95' into the From field and '18.95' into the To field.
11. Ensure Use Retail 1 is checked.
12. Select OK or enter to save.
13. Select Alt T Tag.
 - The search will commence, you will see the search bar move across matching items found.
14. When search is complete, select Alt V View and then Alt A Order All to send items to Place Orders.

Tagged Stock

General | Ranges | Special

Description: Sony Nice Price CD's

Operator: []

Creation Date: 2/11/2000 Days To Keep: 1 Expiry Date: 2/11/2000

Department: []

Category: CD Compact Discs

Supplier: SMA SONY MUSIC

Genre: []

Purchase Type: []

Cat. No Prefix: []

Manual Control:

OK

Tagged Stock

General | Ranges | Special

	From	To
Stock on Hand	0	0
Stock on Order	[]	[]
Minimum SOH	[]	[]
Cost Price	[]	[]
Retail Price	18.95	18.95
Gross Profit %	[]	[]
Acquisition Date	[]	[]
Last Sale Date	[]	[]
Last Receipt Date	[]	[]
Alarm Date	[]	[]
Loyalty Points %	[]	[]

Use Cost Price:
 Item
 Average
 Last

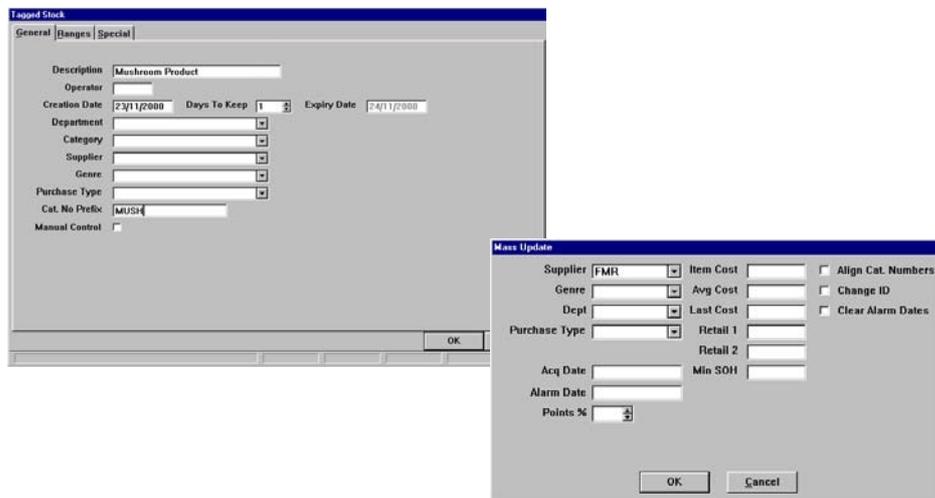
Use Retail:
 Price 1
 Price 2

OK Exit

Find all Mushroom catalogue numbers and update them to the supplier FMR.

Steps:

1. Input a valid Operator ID.
➡ The transaction indicator will display SALE and the Control Menu will change to the Main Menu.
2. Select Alt S Stock from the Main Menu
3. Select F9 from the Stock Menu.
4. Select Alt A Add.
5. Input into the description field 'Mushroom Product'.
6. Tab to the Catalogue Prefix and input 'MUSH'.
7. Select OK or enter to save.
8. Select Alt T Tag.
➡ The search will commence, you will see the search bar move across matching items found.
9. When search is complete, select Alt V View and then Alt U Update.
10. Select FMR in the Supplier Field then select OK or enter.
➡ The update will commence, you will see the update bar move across updating the items.



Print a list of all BMG CD Singles in stock for possible return.

Steps:

1. Input a valid Operator ID.
➡ The transaction indicator will display SALE and the Control Menu will change to the Main Menu.
2. Select Alt S Stock from the Main Menu
3. Select F9 from the Stock Menu.
4. Select Alt A Add.
5. Input into the description field 'BMG CD Singles'.
6. Tab to the Category field and select DS.
7. Tab to the Supplier field and select BMG.
8. Select Alt R Ranges to change to the Ranges tab.
9. Input '1' into the SOH From field and leave the SOH To field blank.
10. Select OK or enter to save.
11. Select Alt T Tag.
➡ The search will commence, you will see the search bar move across matching items found.
12. When search is complete, select Alt V View and then Alt P Print.
13. Select Sales as the Report Style and whichever sort sequence you prefer then select OK to generate report.

