

## How to Set Stock Control (hospitality)

There are 6 steps to starting stock control with myPOS. This documents assumes you are familiar with entering the back office in myPOS. You should do the following steps first:

### **1. The Items file**

This is located under 'System Setup' and then 'PLU / Item management' and then 'Items / PLUs'. Anything that you want stock control on should be in here, also any major item that you sell on a till should be in here. Examples might be bottles of wine and the same wine in various glass sizes.

We suggest - Any item that you want stock control on should have its Stock Control flag set to Y. Click on the item, change the flag to Y and press 'Data' and then 'Save' on the pull down menus.

### **2. The Units of Measure file**

This is located under 'System Setup' and then 'POS Control data' and then 'Units'. This tells the system how to get from one size to another, for example to get from 11 gallon Kegs to Pints, or from 700ml Bottles to 125 ML Glasses.

We suggest - print out a list of all items, this can be done by going from the main menu to 'Back Office' and then 'Reports / analysis' and selecting the option PLU listing. Run for all items to the printer.

Review this list manually and think about:

- i)** How do I Buy this item
- ii)** How do I Sell this item
- iii)** How do I Stock this item

For example, you may buy and stock in the same way, e.g.

I buy in 11 Gallon kegs, stock in 11 Gallon Kegs and sell Pints or I buy in Cases of 6, stock in Bottles and sell in Bottles, 125ml glasses and 250ml Glasses.

The units of measure file needs to be built with the different ways of getting from one unit to another, e.g.

If I stock in 11 Gallon Kegs and sell Pints I need a record:

Unit = Pints  
Parent = 11 Gallon Kegs  
Qty = 88

If I buy in cases of 24 and sell in individual bottles

Unit = Case 24  
Parent = Bottle  
Qty = 0.04167

The 0.04167 is 1 divided by 24

### **3. The Units of measure need to be set for each item**

This is located under 'System Setup' and then 'PLU / Item management' and then 'Stock Control'. Click on each item to set its units of measure, clear the current entry and type in the new Unit or leave blank to get a list. Click on press 'Data' and then 'Save' on the pull down menus to save the record.

*Note:* If you only get a list of a couple of items and not the one you want then this means there is not a Unit of Measure (see 2 above) setup. For example, if the stock unit is 11 Gallon Kegs and the only options for the sales unit are Pints and 11 gallon Kegs and you want Pitcher, then you need to set this up as a valid Unit of Measure in 2 above saying how to get from 11 Gallon Kegs to Pitchers.

### **4. The Recipes file**

This is located under 'System Setup' and then 'PLU / Item management' and then 'Stock Control', select the icon 'Recipes' on the left hand side.

Recipes are used for items you sell on the till, but cannot physical count. Most common examples are:

- Glasses of Wine - you count the bottle
- Cocktails - you count the spirit, the juices
- Half Pints and Pitchers of Beer - you count the main beer (typically the Pint item which you stock in Kegs)

Recipes tell the system to not downdate the stock of the item sold but rather downdate the individual items it is made up of.

### **Example 1:**

I have a Red House Wine, which I buy by the bottle in 750ml, I sell this as a bottle or I sell it as a 175ml Glass.

Check List:

- i)** House Wine Red Bottle is set-up on the till as an item
- ii)** House Wine Red Glass is set-up on the till as an item
- iii)** Unit of Measure database has the following records

Identifier	Parent	Qty
Bottle 750ml	Bottle 750ml	1
Glass 175ml	Glass 175ml	1
Glass 175ml	Bottle 750ml	4.28

- iv)** The units of measure are set for the red house wine bottle item as

Stock = Bottle 750ml

Sell = Bottle 750ml

Purchase = Bottle 750ml

v) The units of measure are set for the red house wine glass item as

Stock = Glass 175ml  
 Sell = Glass 175ml  
 Purchase = Glass 175ml

vi) A recipe is set for the red house wine glass item as it consists of 0.23 of a Bottle

When you do the count and talk about on hand quantities, you are referring to the red house wine bottle and in bottles e.g. 7.25 would mean 7 and a quarter bottles.

### **Example 2:**

I have a Beer that I buy by the 11 Gallon Keg; I sell this as Pints and as Half Pints

Check List:

- i) Pint of Beer is setup on the till as an item
- ii) Half Pint of Beer is setup on the till as an item
- iii) Unit of Measure database has the following records

<u>Identifier</u>	<u>Parent</u>	<u>Qty</u>
11 Gallon Keg	11 Gallon Keg	1
Pint	Pint	1
Half Pint	Half Pint	1
Pint	11 Gallon Keg	88

iv) The units of measure are set for the Pint of Beer item as

Stock = 11 Gallon Keg  
 Sell = Pint  
 Purchase = 11 Gallon Keg

v) The units of measure are set for the Half Pint of Beer item as

Stock = Half Pint

Sell = Half Pint

Purchase = Half Pint

vi) A recipe is set for the Half Pint of Beer item as it consists of 0.5 of a pint of beer

When you do the count and talk about on hand quantities, you are referring to the pint of beer and in kegs e.g. 2.25 would mean 2 and a quarter 11-gallon kegs.

## 5. Counting for the first time

This is located under 'Back office' and then 'Stock take'. Z all tills and switch off. Run the 'Sync Tills' option under 'Back office'. Run a zeroising stock take.

Select Step 1 - Take Snapshot, answer yes to all questions.

Select Step 4 - Update Items file, tick the box 'update unmarked quantities as zero' and press Update. Remove the snapshot file; this will zero out the stock in the system.

Run the stock take again.

Select Step 1 - Take Snapshot, answer yes to all questions.

Select Step 2 - Enter Stock Take, select the icon 'print List' and select 'List all uncounted PLUs'. Go and do the physical count enter the count on the print out.

Select Step 2 - Enter Stock Take, enter quantities and reprint lists as required.

Select Step 3 - Report on changes --- This will be the count you just entered as number 5 above was to zero stock for the first time.

Select Step 4 - Update Items, tick the box 'update unmarked quantities as zero' and press Update. This will send the new counts back and also zeroise again any uncounted items. Do not tick this box if you have just not counted some items.

Restart tills as required.

## **6. Counting the second time (the real stock count)**

Again this is located under 'Back office' and then 'Stock take'. Z all tills and switch off. Run the 'Sync Tills' option under 'Back office'.

Select Step 1 - Take Snapshot, answer yes to all questions.

Select Step 2 - Enter Stock Take, select the icon 'print List' and select 'List all uncounted PLUs'. Go and do the physical count enter the count on the print out.

Select Step 2 - Enter Stock Take, enter quantities and reprint lists as required.

Select Step 3 - Report on changes - This will be differences between the system and what you have counted, this should be investigated where there is a major difference, small decimal changes are probably due to wastage, inaccurate pouring etc.

Select Step 4 - Update Items, tick the box 'update unmarked quantities as zero' and press Update. This will send the new counts back and also zeroise again any uncounted items. DO NOT tick this box if you have just not counted some items.