

Everything Epos Ltd

My Epos Online Back Office




Case Size and Stocktake Guide

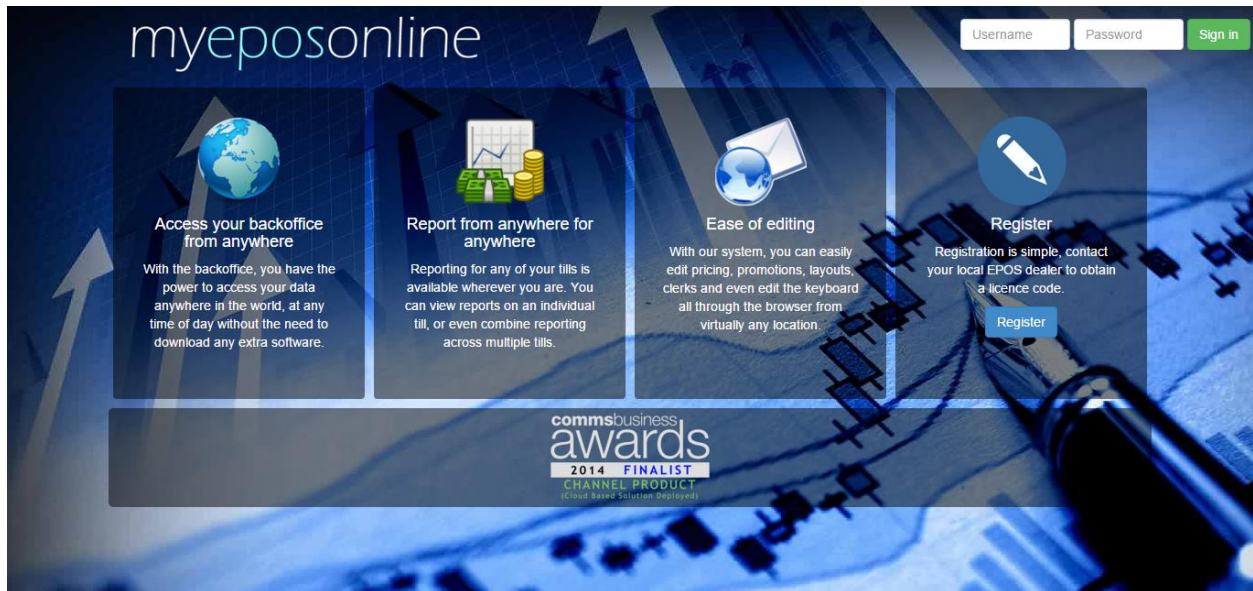
Logging onto My Epos

The back office system “My Epos Online” is web based. This can be accessed from any mobile device, tablet, PC or laptop from anywhere with an internet connection.

Weblink:

www.mypeposonline.com

 myeposonline.com



At the top right of the page above you will need to enter your Username and Password. These will be unique to yourself. These are obtainable from your dealer

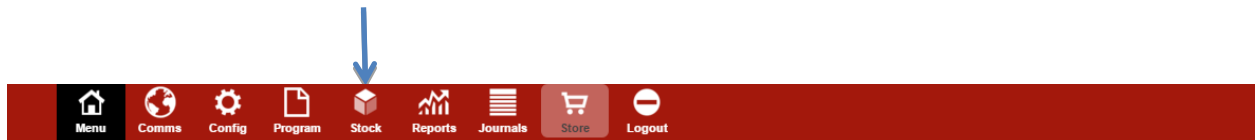


Creating Case Sizes (As Required)

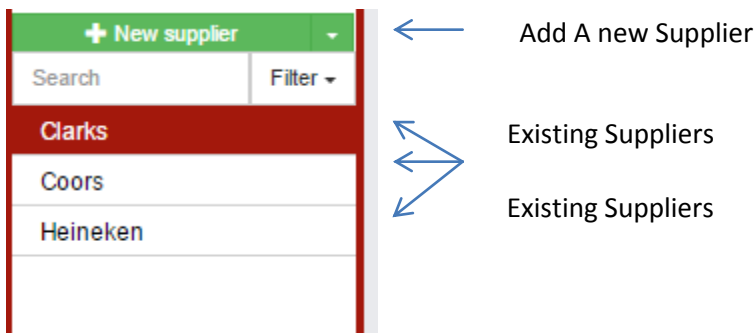
In order to effectively manage and account for stock it is advised to create and allocate “Case Sizes” to each product. This would potentially be a one-time only process.

Step 1 – Creating A List Of Suppliers

If it hasn’t already been created, you will need to create a list of your suppliers. This would be used later on in the process to allocate the case size to the product. This is accessed through **Stock > Suppliers** from the navigation system at the top of the page



Once you have clicked on **Stock > Suppliers** you will then be greeted with the current list.



Adding A New Supplier

If you select the green button saying New Supplier then it will show you a blank Supplier screen. From this page you will be able to enter the relevant supplier details.

A screenshot of the 'Add New Supplier' form. At the top, there is a navigation bar with four icons: a globe, a list, a red circle with a white 'X', and a red circle with a white 'X'. Below the icons are the labels 'General', 'Products', 'All Sites', and 'Delete'. The form itself has two columns. The left column contains fields for 'Record', 'Name', 'Phone', 'E-mail', and 'Minimum Order'. The right column contains fields for 'Address 1', 'Address 2', 'Address 3', 'City', and 'Postcode'. The 'Record' field is a greyed-out text box. The 'Phone' field has a small telephone icon to its left. The 'Minimum Order' field has a currency symbol '£' and the value '0.00'.

Once complete you will need to select the **“Save Supplier”** button at the bottom of the page.

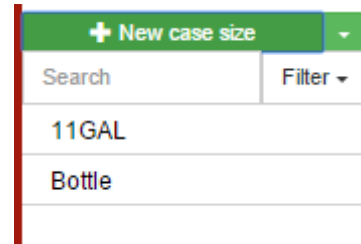
Step 2 – Creating A List of Case Sizes

Once you have got a list of Suppliers entered within the system; you will then be able to add a list of Case Sizes. You will only need to enter a case size once. For instance, if you sell Carling from an 11 Gallon Keg and also Strongbow from an 11 Gallon Keg, you will only need one case size – not one for each.

The Case Size section is accessed from **Stock > Case Sizes**

The layout of the screens is very similar to the supplier section that we have already ran through

In order to add a New Case Size you will need to click on “New Case Size”



A screenshot of a software interface. At the top is a green button with a white plus icon and the text '+ New case size'. Below this is a table with two columns: 'Search' and 'Filter'. The 'Search' column contains the text '11GAL' and the 'Filter' column contains the text 'Bottle'.

All that you will need to enter is a Name for the case size and also how many units are in the Case size

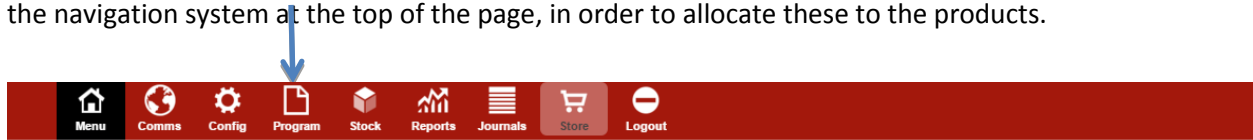


A form with two input fields. The first field is labeled 'Record Name' and the second field is labeled 'Quantity'.

Once you have entered the Name and Quantity you can click on Save Case Size at the bottom of the screen

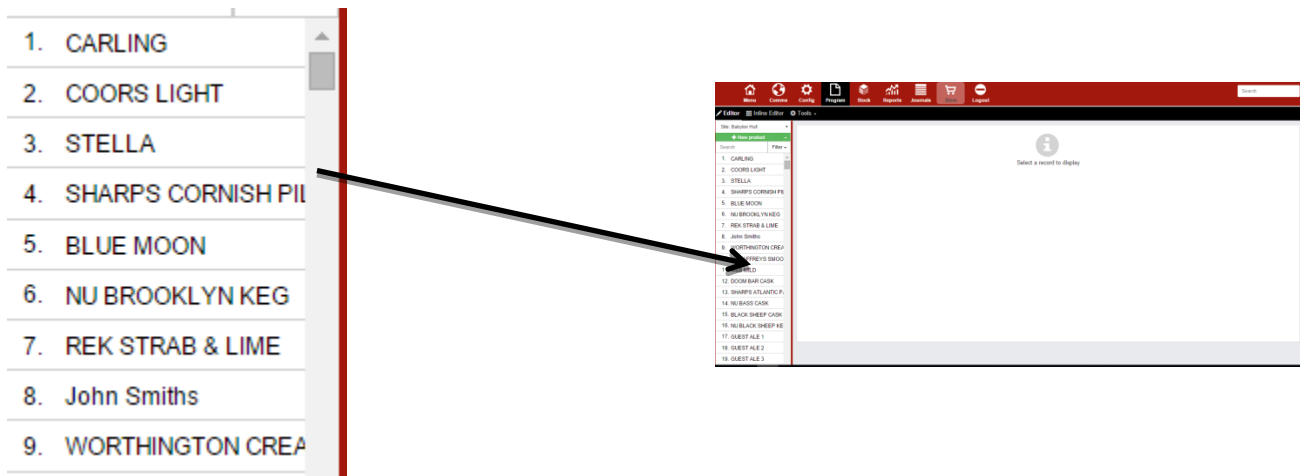
Step 3 – Locating your Product List

Once you have created your suppliers and case sizes, you will need to access **Program > Products** from the navigation system at the top of the page, in order to allocate these to the products.



Step 4 – Selecting a product

Once you have clicked on **Products** from the Program Menu above you will see the below page



For the purpose of this guide I will use the first product in the list (Carling)

The screenshot shows a detailed product configuration page for 'CARLING'. At the top is a navigation bar with icons for General, Pricing, List PLUs, Printing, Stock, Other, Production, Activity, Suppliers, Recipes, History, All Sites, and Delete. The main content area is divided into two columns. The left column contains fields for Record (1), Name (CARLING), Update keyboard text (Yes/No), Barcode, Department (Wet Sales), PLU Group (DRAUGHT), and Tax Rate (VAT @ 20%). The right column contains fields for Price 1 (Level 1) (£ 2.85), Price 2 (Level 1) (£ 1.45), Price 3 (Level 1) (£ 0.00), Mix and Match, Last sold (05/02/2016 23:42), Margin (22,700.0%), New product? (Yes/No), Qty to sell at price 1 (1.00), Qty to sell at price 2 (0.50), and Qty to sell at price 3 (2.00). At the bottom are buttons for 'Save product', 'Save & send to tills', and 'Reset'. The URL at the bottom left is 'e=programdata/programdata.php§ion=pro...'.

Step 5 – Locating the Suppliers Section

You will need to select a product from the list upon the left hand side. This will then load the relevant product details in the main section of the page.

You will now see another menu system which will navigate around the different aspects relating to Products. You will need to select **Suppliers** from this



The screenshot shows the 'Suppliers' section of the software interface. The top menu bar contains icons for General, Pricing, List PLUs, Printing, Stock, Other, Production, Activity, Suppliers, Recipes, History, All Sites, and Delete. The 'Suppliers' icon is highlighted with a blue arrow. Below the menu bar, the 'Suppliers' section displays the following information:

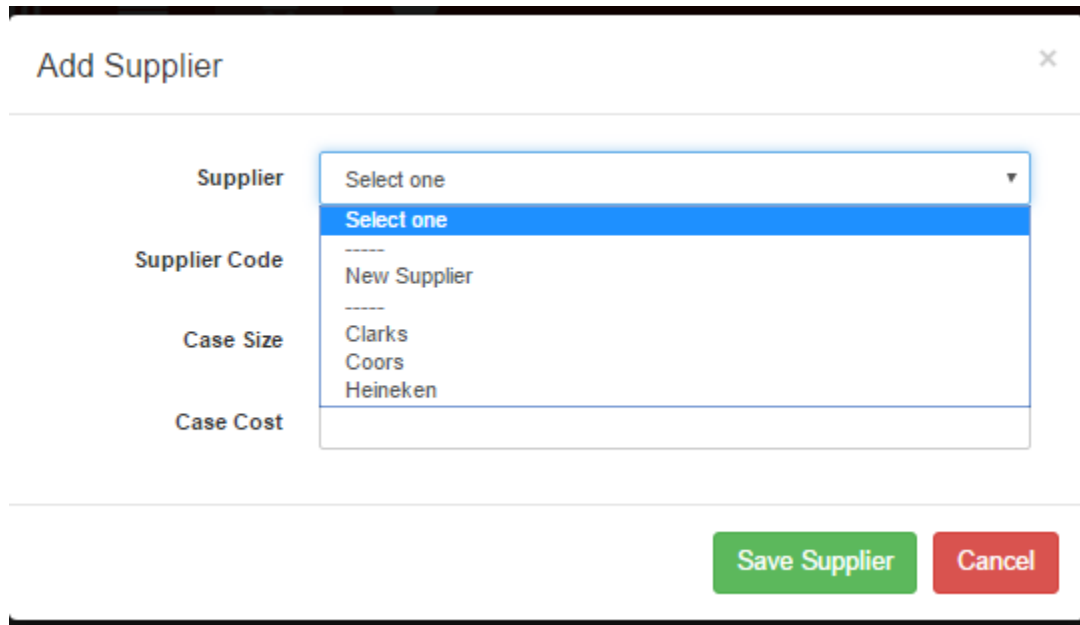
Record	1	Price 1 (Level 1)	£ 2.85
Name	CARLING	Price 2 (Level 1)	£ 1.45
Update keyboard text	Yes No	Price 3 (Level 1)	£ 0.00

Step 6 – Allocating a supplier

Initially you will see that nothing has been configured for the product.

On the right hand side of the screen you will see a Green button saying “Add Supplier”

This will now pop up with the following menu



The screenshot shows a pop-up window titled "Add Supplier" with a close button (X) in the top right corner. The window contains four input fields: "Supplier", "Supplier Code", "Case Size", and "Case Cost". The "Supplier" field is currently open, showing a dropdown menu with the following options: "Select one" (highlighted in blue), "New Supplier", "Clarks", "Coors", and "Heineken". The "Supplier Code" field has a dashed line above it. The "Case Size" field has a dashed line above it. The "Case Cost" field is empty. At the bottom right of the window, there are two buttons: "Save Supplier" (green) and "Cancel" (red).



Supplier: Selecting a supplier for this product. If the current supplier is not in the list then you can create a New Supplier instantly

Supplier Code: This is used within the ordering and delivery section. It allows easy recognition to identify the Product. The supplier code is your Suppliers Internal Product Code

Case Size: Select a Case Size for this item. If the applicable case size is not in the list, then you will be able to create a new Case Size from this pop-up

Case Cost: If the system has been configured to account for VAT (*Reference General Tab*) then this would be entered Exclusive of VAT; otherwise Inclusive

Once you have clicked on **“Save Supplier”** you will see that the initial page has been changed to the below image

Supplier	Code	Case Size	Case Cost	Unit Cost	
Heineken		11GAL (88 units)	100 	1.14	

You will see that this has populated a Unit Cost field. This has been calculated by

Case Cost / Case Size (100/88)

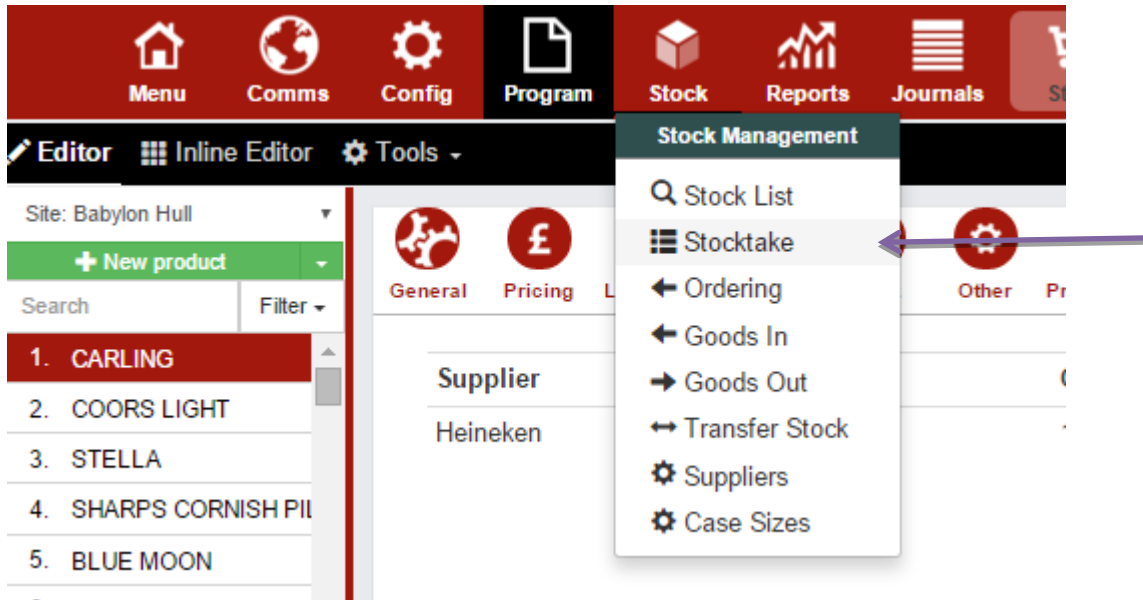


There is also a symbol next to the Case Cost. Clicking on this will allow you to change the current cast cost

Stocktake Entry

Step 1 – Accessing the Stock Section

Once you have entered and allocated Case Sizes for the Products, you will then easily be able to complete a stock take. Using the navigation system at the top of the page you will access **Stock > Stocktake**



Site

Run stocktake for site:
Babylon Hull

Add PLUs to stocktake:

Filter by department

Filter by PLU Group

Filter by Supplier

+ Add

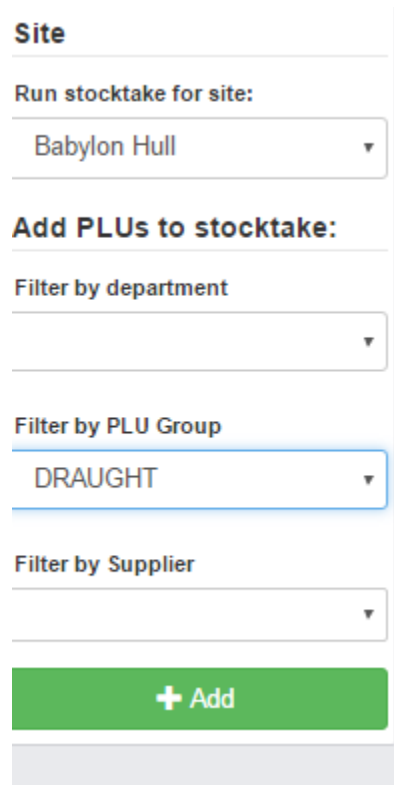
Stocktake

Record	Name	Case Size	Individual Stock	Case Stock	Total Stock
<div><div>i</div><div>To start a stocktake, select filters on the left hand side to add products.</div></div>					

Run Stocktake

Cancel and discard

Step 2 – Selecting the relevant Department / PLU Group



The screenshot shows a web interface for selecting a stocktake site and department. It features four dropdown menus and an 'Add' button. The first dropdown, labeled 'Run stocktake for site:', has 'Babylon Hull' selected. The second dropdown, labeled 'Filter by department', is empty. The third dropdown, labeled 'Filter by PLU Group', has 'DRAUGHT' selected and is highlighted with a blue border. The fourth dropdown, labeled 'Filter by Supplier', is empty. A green button with a white plus icon and the text '+ Add' is at the bottom.

Site

Run stocktake for site:

Babylon Hull ▼

Add PLUs to stocktake:

Filter by department

Filter by PLU Group

DRAUGHT ▼

Filter by Supplier

+ Add

Once you have accessed the Stocktake Page you will be greeted with the image above. It is easier to process the Stocktake in Groups at a time. Loading a large list of Products in one go may take a short while and delay the stocktake process.

For the purpose of this Guide I will process a Stocktake for the Draught Section only

After selecting the PLU Group you will need to select the **Add** button at the bottom.

Step 3 – Entering the Stock Quantities.

In the right hand section of the screen you will now be presented with a list of all products within your applied filter.

You can see below that the first Product (Carling) has a case size allocated. This is because it was allocated in the first section of this guide.

Stocktake					
Record	Name	Case Size	Individual Stock	Case Stock	Total Stock
1	CARLING	11GAL	<input type="text"/>	<input type="text"/>	<input type="text"/>
2	COORS LIGHT		<input type="text"/>	<input type="text"/>	<input type="text"/>
3	STELLA		<input type="text"/>	<input type="text"/>	<input type="text"/>
4	SHARPS CORNISH PILSNER		<input type="text"/>	<input type="text"/>	<input type="text"/>
5	BLUE MOON		<input type="text"/>	<input type="text"/>	<input type="text"/>
6	MILBROOKLYN KECS		<input type="text"/>	<input type="text"/>	<input type="text"/>

Case Size: This is a pre-determined selection based upon what has been allocated previously

Individual Stock: This is where you would enter the total of individual items

Case Stock: This is where you would enter complete cases (or percentages of)

Example 1

You have completed a Stock Take and have 4 Unopened Kegs of Carling and a measured 34 Pints. This would be entered as 4 Case Stock and 34 Individual Stock. *The total stock figure is automatically calculated*

Individual Stock	Case Stock	Total Stock
<input type="text" value="34"/>	<input type="text" value="4"/>	<input type="text" value="386"/>

Example 2

You have completed a Stock Take and have measured that you have exactly 0.5 Kegs. This would be entered as 0.5 Case Stock and 0 Individual Stock. *The total stock figure is automatically calculated*

Individual Stock	Case Stock	Total Stock
<input type="text"/>	<input type="text" value="0.5"/>	<input type="text" value="44"/>

Being able to enter decimal Case Stock is especially useful with Spirits whereas this is normally calculated in 10th of a Bottle

Once all stock Quantities have been entered for this Stocktake. You will need to click on the Run Stocktake Button at the bottom

