# Everything Epos Ltd

# My Epos Online Back Office

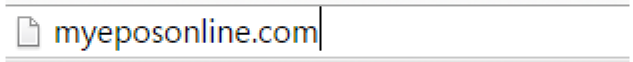
# Case Size and Stocktake Guide

## 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.

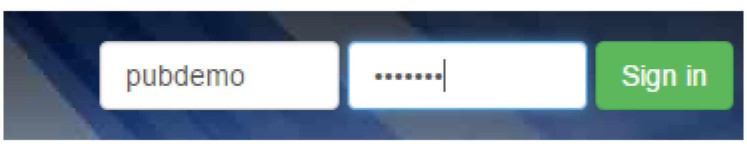
**Weblink:**

www.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



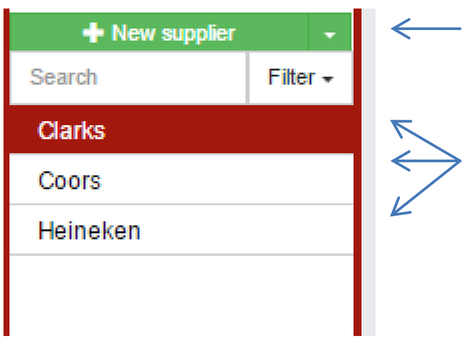
## Creating Case Sizes (As Required)

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.



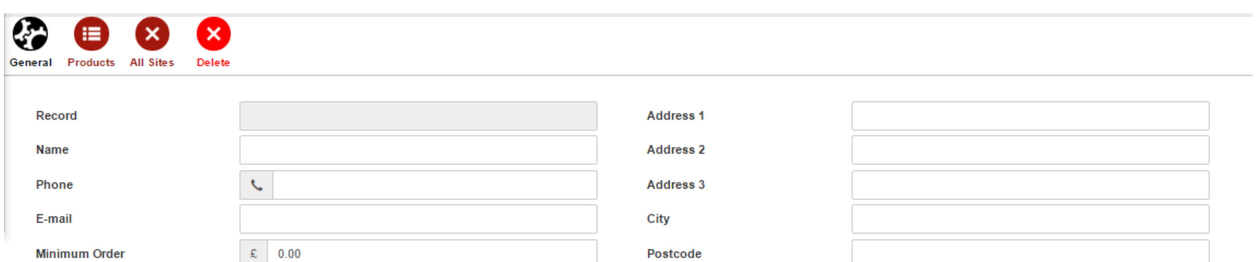

Add A new Supplier

Existing Suppliers

Existing Suppliers

#### *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.




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

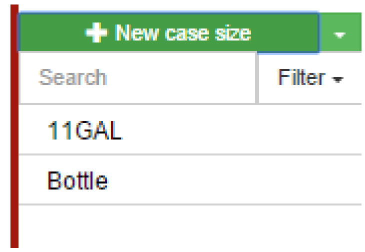
## Step 2 – Creating A List of Case Sizes

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"




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

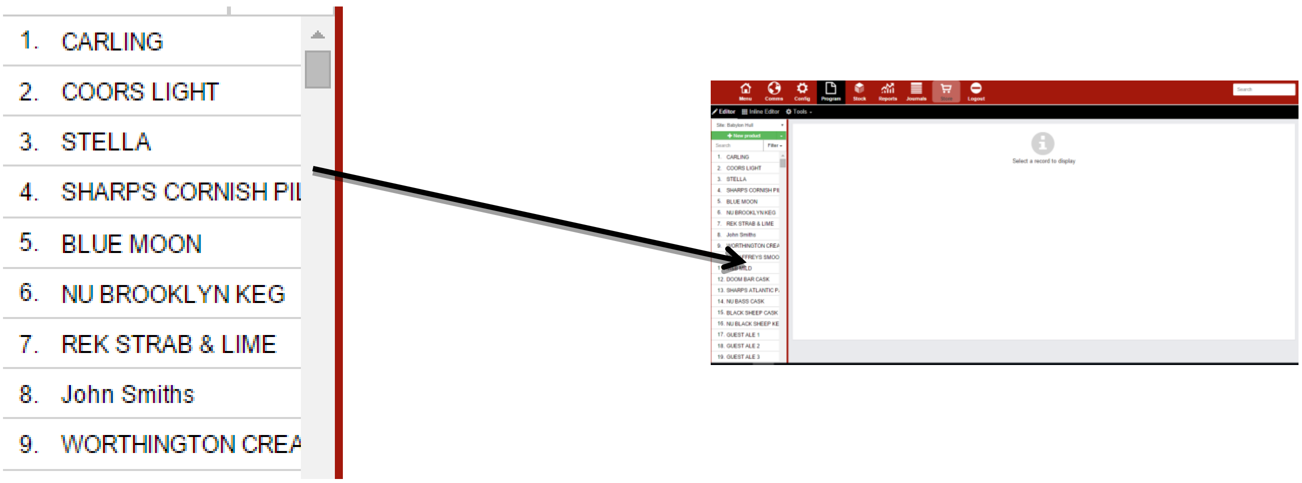

Once you have entered the Name and Quantity you can click on Save Case Size at the bottom of the screen

## Step 3 – Locating your Product List

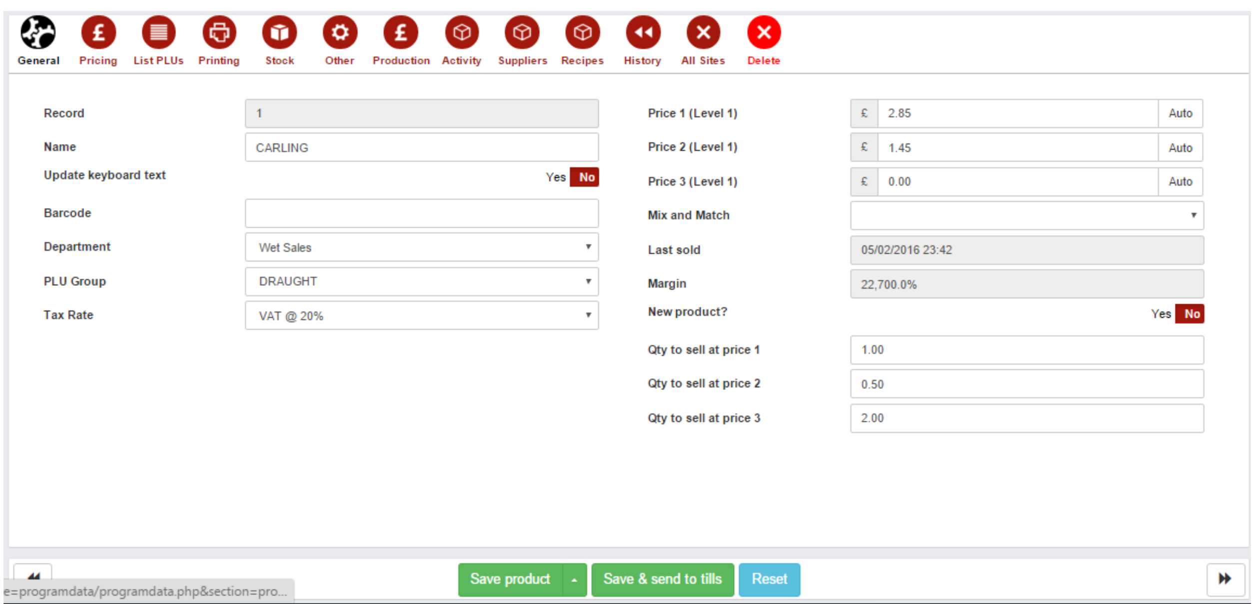
Once you have created your suppliers and case sizes, you will need to access **Program > Products** from the navigation system at the top of the page, in order to allocate these to the products.


## Step 4 – Selecting a product

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



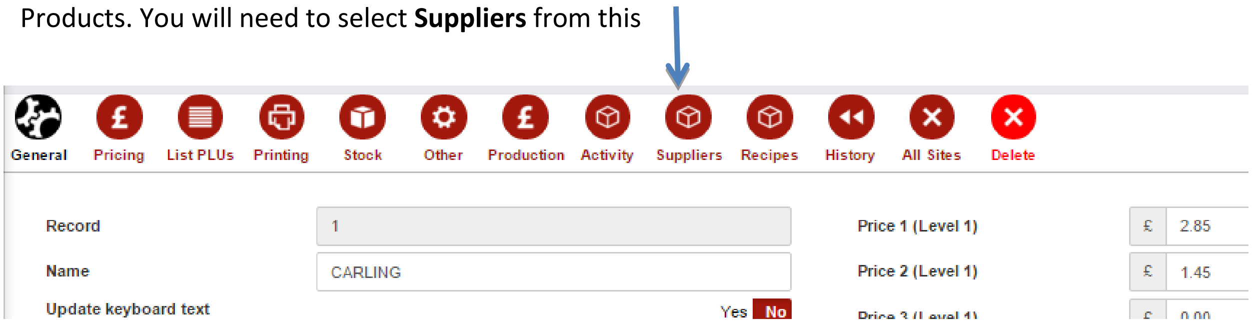

*For the purpose of this guide I will use the first product in the list (Carling)*



## 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

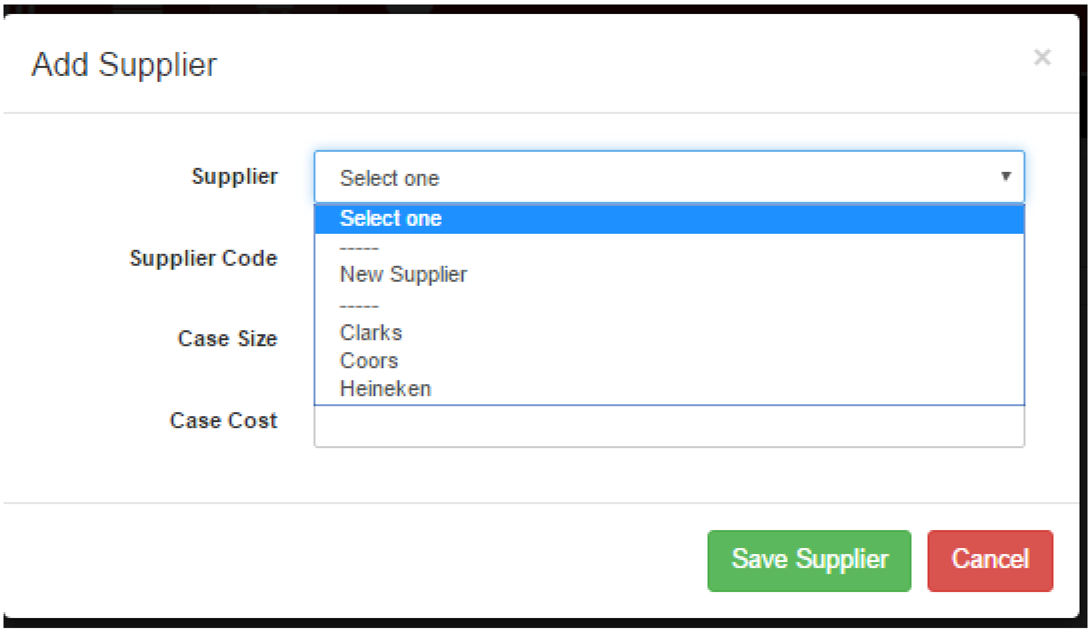


## Step 6 – Allocating a supplier

Intially 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




**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

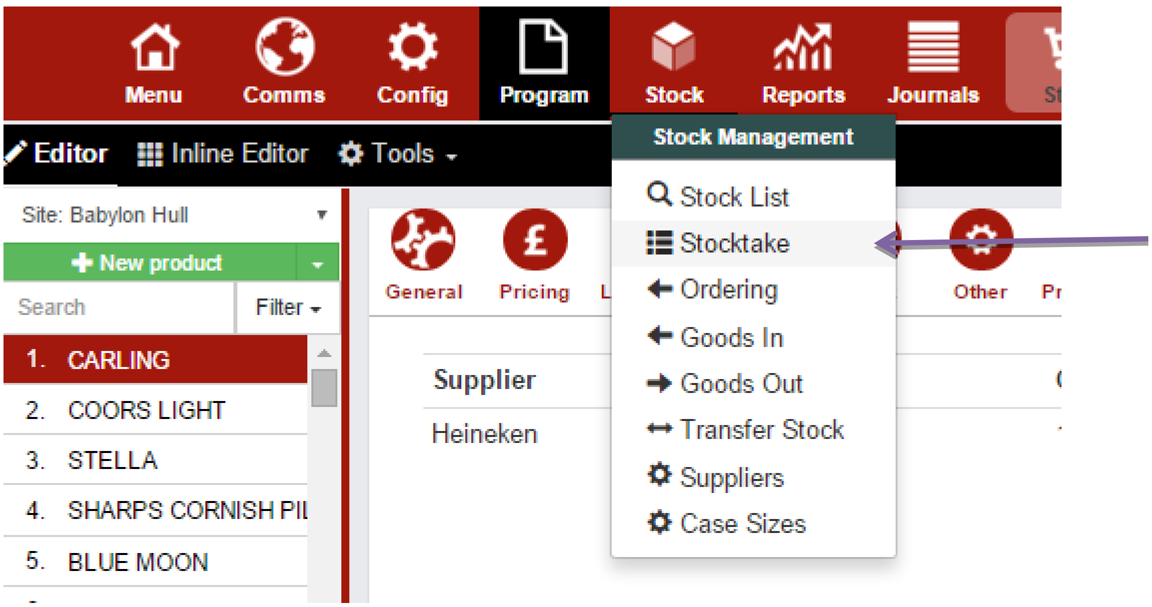
*Case Cost / Case Size (100/88)*

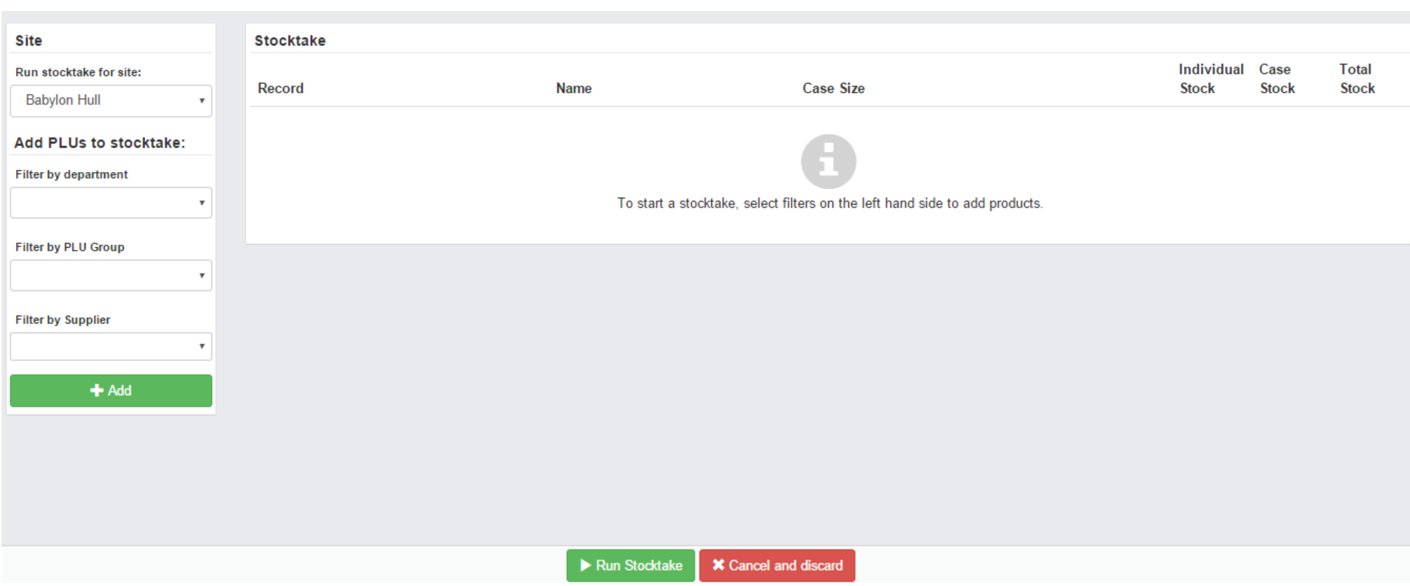
There is also a symbol next to the Case Cost. Clicking on this will allow you to change the current cast cost

## Stocktake Entry

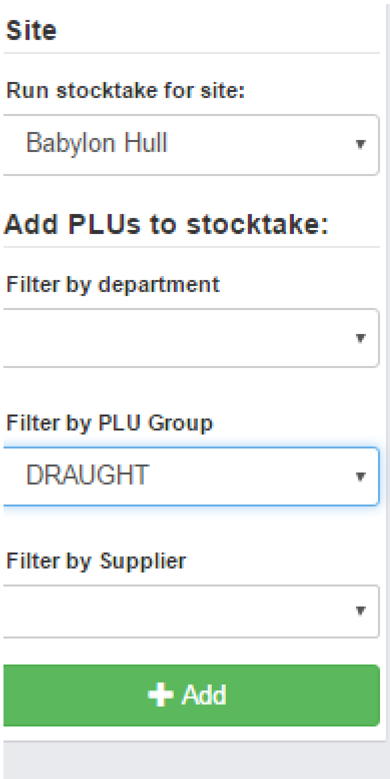
### Step 1 – Accessing the Stock Section

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**



### Step 2 – Selecting the relevant Department / PLU Group




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 Quanties.

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 | | | |
| 2 | COORS LIGHT | | | | |
| 3 | STELLA | | | | |
| 4 | SHARPS CORNISH PILSNER | | | | |
| 5 | BLUE MOON | | | | |
| 6 | NU BROOKLYN KEG | | | | |

**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 |
|---|---|---|
| 34 | 4 | 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 |
|---|---|---|
| | 0.5 | 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**