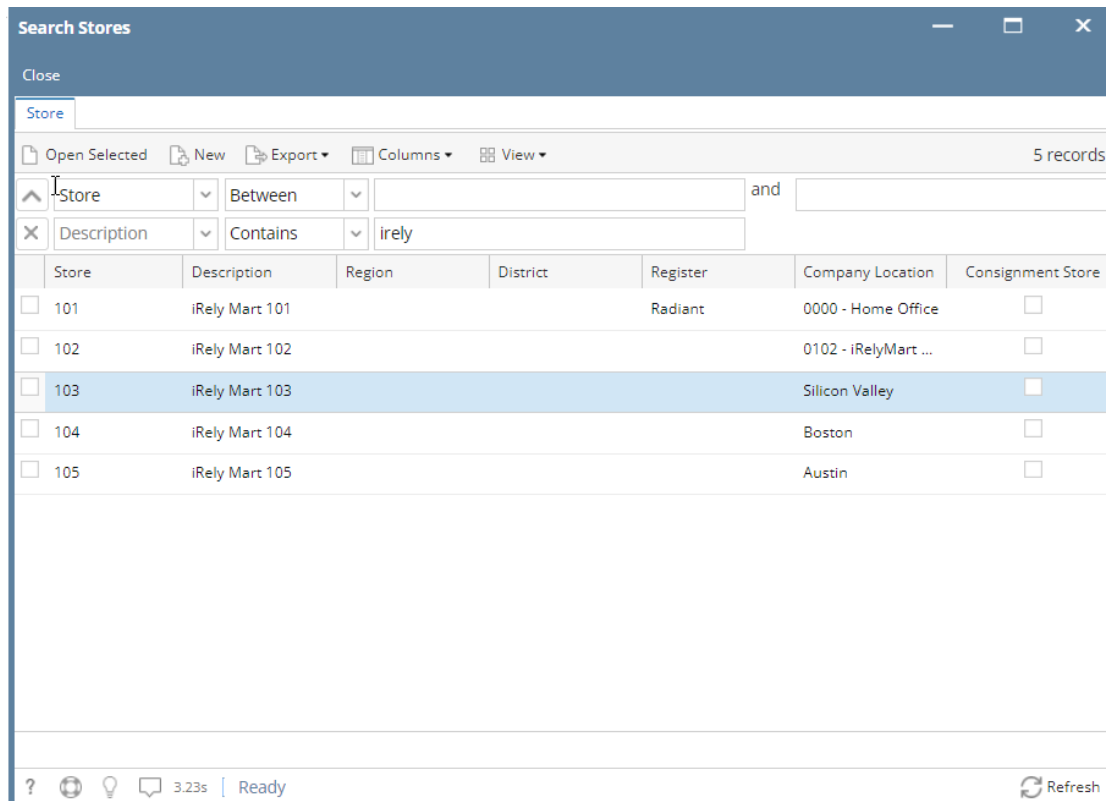
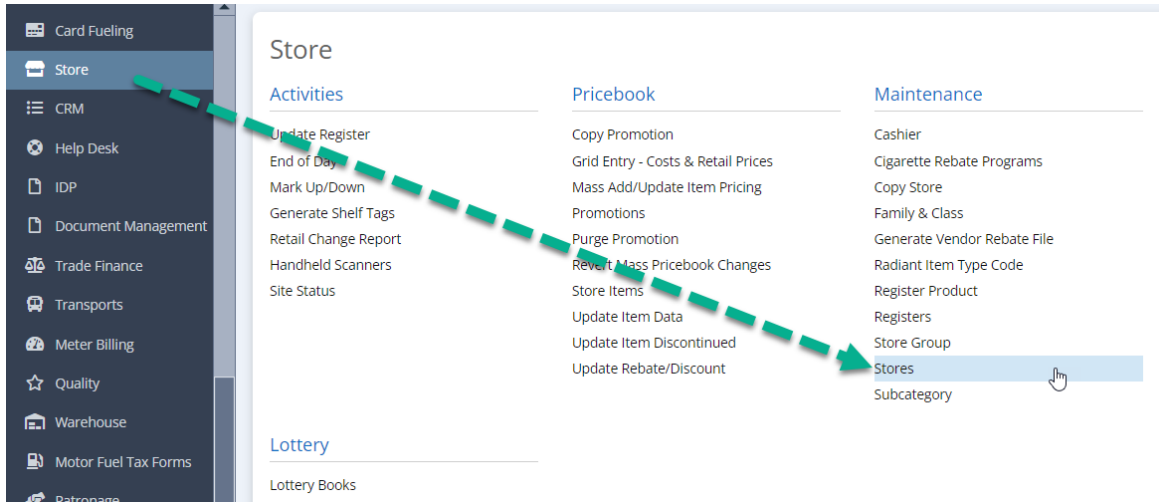


How to create a Store record

This screen is used to setup a store record. A store record is a virtual representation of your physical store. All important configuration is located in this screen that will be necessary for connecting to the POS and creating an End-Of-Day transactions.

Steps:

1. In **Store** menu, click **Stores**. A search screen for Stores will open
2. Click **New** to open a blank store screen.



Store - 1001 - 1001 STELLHORN

New Save Search Delete Undo Close

Details Setup Register Rebates Departments Payment Options Pump Items Fuel Tanks Tax Totals Metrics ATM Fund Setup Change Fund Setup Con

Store No * 1001

Description 1001 STELLHORN

Location Code * 1001-Stellhorn Store

Consignment Store ☒

Active ☒

Lottery Setup Mode ☐

Region

District

? 1.78s Edited Page 1 of 1 Refresh

1. Enter the following:
 - a. **Store No** - this will serve as the name of the store.
 - b. **Description** - enter any that describes your store
 - c. **Location Code*** - Lets you select the location based on the Company Locations setup
 - d. **Lottery Setup Mode** - if checked, it will be used to validate the Lottery Games if have Sale UOM and Vendor in Item Location.
 - e. **Region** - Enter appropriate region to where your store belongs
 - f. **District** - Enter appropriate district to where your store belongs

Setup tab

1. After completing the steps above, go ahead and click the **Setup** tab. It is located next to the Details tab.
2. Enter the following values:
 - a. **Handheld Device Cost Basis** - can be either last or current cost.
 - b. **Maximum PLU Number** - Usually a 4 or 5 digits.
 - c. **Treat 7 Digit UPCs as PLUs** - When enabled, any 7-digit UPC code will be treated as a PLU
 - d. **Number of Shifts in a Day** - Default value is 9. Some number needs to be added in this field otherwise it prevent you from having more than one shift in a day.
 - e. **End of Day Customer*** - Selection will be based on the setup on Sales (A/R) Create New Customer
 - f. **Customer Charges Item*** - Selection will be based on the setup on Inventory Maintenance Items
 - g. **Over Short/Item Id*** - Selection will be based on the setup on Inventory Maintenance Items

Store - 1001 - 1001 STELLHORN

New Save Duplicate Search Delete Undo Close

Details **Setup** Register Rebates Payment Options Pump Items Tax Totals Metrics ATM Fund Setup Change Fund Setup Audit Log

Handheld Device Cost Basis		Last Shift Open Date	4/13/2022
Maximum PLU Number	9,999	Last Shift Number	0
Treat 7 Digit UPCs as PLUs	<input type="checkbox"/>	Customer Charges Item	* C-Store Customer Charges
Number of Shifts in a Day	9	Over Short/Item Id	C-STORE OVER/SHORT
Checkout Customer	* C-Store Sales - Stellhorn		

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Register tab

1. After completing the steps above, go ahead and click the **Register** tab. It is located next to the Setup tab.
2. This tab contains the necessary information when linking to a POS device that is setup in Store Registers
3. Enter the following values:
 - **POS Register ID** - lets you select details from the setup in Store Maintenance Register
 - **Report Departments at Gross/Net** - this is a required required. Let's you choose where **Gross** or **Net**
 - **Allow Register Mark Ups/Down** - When enabled, this store record will be allowed to be used in the Mark Up / Down process.
 - **Register End of Day Data Entry** - Lets you choose the default end-of-day method; Automatic Feed or Full Manual Entry

Store - 1001 - 1001 STELLHORN

New Save Search Delete Undo Close

Details Setup **Register** Rebates Departments Payment Options Pump Items Fuel Tanks Tax Totals Metrics ATM Fund Setup Change Fund Setup Con

POS Register ID	COMMANDER-T2729
Report Departments at Gross/Net	* Net
Allow Register Mark Ups/Down	None
Register End of Day Data Entry	Automatic Feed

? 1.78s Edited Page 1 of 1 Refresh

Rebate tab

1. After completing the steps above, go ahead and click the **Rebate** tab. It is located next to the Register tab.
2. This tab contains the necessary information you want a rebate
3. Enter the following values:
 - **Department** - Select the department you want a rebate
 - **Tobacco** - Ticked the box if it is considered a tobacco if not unticked it.

New Save Search Delete Undo Close	
Details	Setup Register Rebates Departments Methods of Payment Pump Items Fuel Tanks Tax Totals Metrics ATM Fund Setup Change Fund Setup Audit Log
<input type="checkbox"/> Remove Export <input type="checkbox"/> View Filter (F3)	
<input type="checkbox"/> Department	Tobacco
<input type="checkbox"/>	<input type="checkbox"/>

Departments tab

1. After completing the steps above, go ahead and click the **Departments** tab. It is located next to the Rebate tab.
2. This tab contains the departments available in your store
3. Enter the following values:

- **Collect Department Totals from this register file** - Choose between where department will be coming from (Dropdown: Department or Category)
- **What level does the data represent** - Choose the level representation (Dropdown: Category or Subcategory)
- **Category** - Contains the code for your department
- **Register Code** - Assigned Register for your Category
- **Fuel** - Ticked the box if it is considered a fuel if not unticked it.

New Save Search Delete Undo Close		
Details	Setup Register Rebates Departments Methods of Payment Pump Items Fuel Tanks Tax Totals Metrics ATM Fund Setup Change Fund Setup	
Collect Department Totals from this register file	* Department	
What level does the data represent	* Categories	
<input type="checkbox"/> Remove Export <input type="checkbox"/> View Filter (F3)		
<input type="checkbox"/> Category	Register Code	Fuel
<input type="checkbox"/> 07-00-00	7000	<input type="checkbox"/>
<input type="checkbox"/> 03-00-00	0300	<input type="checkbox"/>
<input type="checkbox"/> 02-00-00	0200	<input type="checkbox"/>
<input type="checkbox"/> 04-00-00	0400	<input type="checkbox"/>
<input type="checkbox"/> 01-01-00	1	<input type="checkbox"/>
<input type="checkbox"/> 01-02-00	2	<input type="checkbox"/>
<input type="checkbox"/> 01-03-00	333	<input type="checkbox"/>
<input type="checkbox"/> 21-00-00	2100	<input type="checkbox"/>
<input type="checkbox"/> 01-04-00	104	<input type="checkbox"/>
<input type="checkbox"/> 99-02-00	9902	<input type="checkbox"/>
<input type="checkbox"/> 01-05-00	105	<input type="checkbox"/>
<input type="checkbox"/> 27-02-00	2702	<input type="checkbox"/>

Method of Payment tab

1. After completing the steps above, go ahead and click the **Method of Payment** tab. It is located next to the Departments tab.
2. This tab contains the mode of payment available in your store
3. Enter the following values:

- **Payment Option ID**
- **Description**
- **Item**
- **Register MOP**
- **Depositable**
- **Network Credit Card Name**
- **Skip Import**

New Save Search Delete Undo Close						
←	Setup	Register	Rebates	Departments	Methods of Payment	Pump Items
✕ Remove	Export ▾	View ▾	Filter (F3)			
Payment Option ID	Description	Item *	Register MOP	Depositabe	Network Credit Card Name	Skip Ir
<input type="checkbox"/> 1	CASH	MOP1	1	<input type="checkbox"/>		<input type="checkbox"/>
<input type="checkbox"/> 2	EBT	MOP2	95	<input type="checkbox"/>		<input type="checkbox"/>
<input type="checkbox"/> 3	CREDIT	MOP3	3	<input type="checkbox"/>		<input type="checkbox"/>
<input type="checkbox"/> 4	DEBIT	MOP4	4	<input type="checkbox"/>		<input type="checkbox"/>
<input type="checkbox"/> 5	MAN CRED	MOP5	5	<input type="checkbox"/>		<input type="checkbox"/>
<input type="checkbox"/> 6	LOTTERY WINNER	MOP6	9	<input type="checkbox"/>		<input type="checkbox"/>
<input type="checkbox"/> 7	MNF COUPON	MOP7	11	<input type="checkbox"/>		<input type="checkbox"/>
<input type="checkbox"/> 8	PREPAID CARD	MOP8	94	<input type="checkbox"/>		<input type="checkbox"/>
<input type="checkbox"/> 9	ELEC CHECK	MOP9	97	<input type="checkbox"/>		<input type="checkbox"/>

Pumps Items tab

1. After completing the steps above, go ahead and click the **Pump Items** tab. It is located next to the Methods of Payment tab.
2. This tab contains the Pump Items available in your store
3. Fill up the grid details:
 - **Select Item No, Item Description, and UPC will automatically filled out**
 - **Enter Price**
 - **Enter Category**
 - **Enter Tax Group, this is required**
 - **Register Fuel ID 1 & 2**

New Save Search Delete Undo Close						
←	Setup	Register	Rebates	Departments	Methods of Payment	Pump Items
✕ Remove	Export ▾	View ▾	Filter (F3)			
Item No. *	Item Description	UOM	Price	Category	Tax Group *	Register Fuel ID 1
<input type="checkbox"/> 01-01-01	Unleaded - Regular	Gallon Fuel	0.000000	01-01-00	MICUST DNU	1
<input type="checkbox"/> 01-02-02	Unleaded-Mid	Gallon Fuel	0.000000	01-02-00	MICUST DNU	2
<input type="checkbox"/> 01-03-00	Unleaded - Premium	Gallon Fuel	0.000000	01-03-00	MICUST DNU	4
<input type="checkbox"/> 01-04-01	Diesel	Gallon Fuel	0.000000	01-04-00	MICUST DNU	7
<input type="checkbox"/>						

Fuel Tanks tab

1. After completing the steps above, go ahead and click the **Fuel Tanks** tab. It is located next to the Pump Items tab.
2. This tab contains the Fuel tanks Items available in your store
3. Fill up the grid details:
 - **Tank**
 - **Consumption Site**
 - **Fuel**
 - **Description**
 - **Register Tank Number**

New Save Search Delete Undo Close											
←	Setup	Register	Rebates	Departments	Methods of Payment	Pump Items	Fuel Tanks	Tax Totals	Metrics	ATM Fund Setup	Change Fund
✕ Remove		Export ▾		View ▾		Filter (F3)					
<input type="checkbox"/>	Tank*	Consumption Site			Fuel		Description		Register Tank		
<input type="checkbox"/>	0001	0001			01-01-01		Unleaded - Regular		1		
<input type="checkbox"/>	0003	0003			01-03-00		Unleaded - Premium		3		
<input type="checkbox"/>	0004	0004			01-04-01		Diesel		4		
<input type="checkbox"/>									0		

Tax Totals tab

1. After completing the steps above, go ahead and click the **Tax Totals** tab. It is located next to the Fuel Tanks tab.
2. This tab contains the Tax Totals Items available in your store
3. Fill up the grid details:
 - **Select Item No**
 - **Description**
 - **Register Tax Code Number**

NewSaveSearchDeleteUndoClose

←\$

Setup

Register

Rebates

Departments

Methods of Payment

Pump Items

Fuel Tanks

Tax Totals

Metrics

ATM Fund Setup

Change Fund S

✕ Remove

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View ▾

Filter (F3)

<input type="checkbox"/> Item No *	Description	Register Tax Code Number
<input type="checkbox"/> 9991	SALES TAX	1
<input type="checkbox"/> 9992	MI VAPE SALES TAX	2
<input type="checkbox"/>		

Metrics tab

1. After completing the steps above, go ahead and click the **Metrics** tab. It is located next to the Tax Totals tab.
2. This tab contains the Metrics Item available in your store
3. Fill up the grid details:
 - **Description**
 - **Metrics Item**
 - **Offset Item**
 - **Register Import Field**
 - **Department #**

NewSaveSearchDeleteUndoClose

←

Details

Setup

Register

Rebates

Departments

Methods of Payment

Pump Items

Fuel Tanks

Tax Totals

Metrics

ATM Fund Setup

Change

✕ Remove

Export ▾

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View ▾

Filter (F3)

<input type="checkbox"/>	Description*	Metrics Item*	Offset Item*	Register Import Field*	Department #
<input type="checkbox"/>					

ATM Fund Setup tab

1. After completing the steps above, go ahead and click the **ATM Fund Setup** tab. It is located next to the Metrics tab.
2. This tab contains the ATM Fund Item available in your store

- Fill up the grid details:
 - Beg Balance Item**
 - Withdrawals Item**
 - Replenished Item**
 - End Balance Item**
 - Variance Item**

Change Fund Setup tab

- After completing the steps above, go ahead and click the **Change Fund Setup** tab. It is located next to the ATM Fund Setup tab.
- This tab contains the Change Fund Item available in your store
- Fill up the grid details:
 - Change Fund Beg Item**
 - Change Fund End Item**
 - Change Fund Replenishment Item**
 - Description & Default Value**

Audit Log tab

- This tab contains the all logs happen in this store.

Click **Save** to proceed.

Here are the steps on how to create a Store:

- From Store menu, click **stores**.

If there's an existing store, **Search stores** screen will open. Otherwise, **Blank store** screen will open automatically.

- If there is existing store. Click **New** to open blank store screen.
 - Enter **Store No**, this will serve as the name of the store.
 - Enter **Description**
 - Enter **Location Code**, this field is required to save the store.
 - Enter **Region**.
 - Enter **District**.
 - Enter **address** in search address.
 - Complete the other details in this tab.
- Click **Setup** tab.
 - Enter **Handheld Folder Path**, valid folder that is accessible by i21.
 - Select a **Handheld Device Cost Basis**, can be either last or current cost.
 - Enter the **Default Vendor**.

Default Vendor is the vendor to be used in store transaction by default. User can also change the default vendor to any vendor in every store transactions.

- d. Enter company ID for GL
- e. Enter company ID for AR
- f. Enter Maximum PLU number
- g. Enter **Handheld Device Model**

Default Vendor is the vendor to be used in store transaction by default. User can also change the default vendor to any vendor in every store transactions.

- h. Enter **Maximum PLU Number**. Usually a 4 or 5 digits.
 - i. Enter **Number of Shifts in a Day**.
 - j. Enter **GL Sales Indicator**
 - k. Enter **Last Inventory Close Date**
 - l. Select **Tax Group ID**, this is required.
 - m. Select **End of Day Customer**, this is required.
 - n. Select **Customer Charges Item**, this is required.
 - o. Select **Customer Payment Item**, this is required.
 - p. Select **Over Short/Item Id**, this is required.
 - q. Fill up other details in the setup tab.
4. Click **Register** tab.
 - a. Click tag field and type in to filter the **Department/s**
 - b. Under the Vendor Setup:
 - i. Select Vendor
 - ii. Enter Account Number
 - c. Click **Register Product** tab.
 - d. Fill up the grid details:
 - i. Enter Product Code
 - ii. Enter Description
 - iii. Enter Comments
 5. Click **Payment Options** tab.
 6. Fill up the grid details:
 - a. Enter Payment Option Id
 - b. Enter Description
 - c. Select available Item
 7. Click **Pumps Items** tab.
 - a. Fill up the grid details::
 - i. Enter Pump ID
 - ii. Select Item No, Item Description will automatically filled out
 - iii. Enter Price
 - iv. Enter Category
 - v. Enter Tax Group
 8. Click **Tax Totals** tab.
 - a. Fill up the grid details::
 - i. Enter Tax Code
 - ii. Select Item No
 - iii. Enter Item Description
 - iv. Enter Price
 - v. Enter Category
 - vi. Enter Tax Group