# 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.
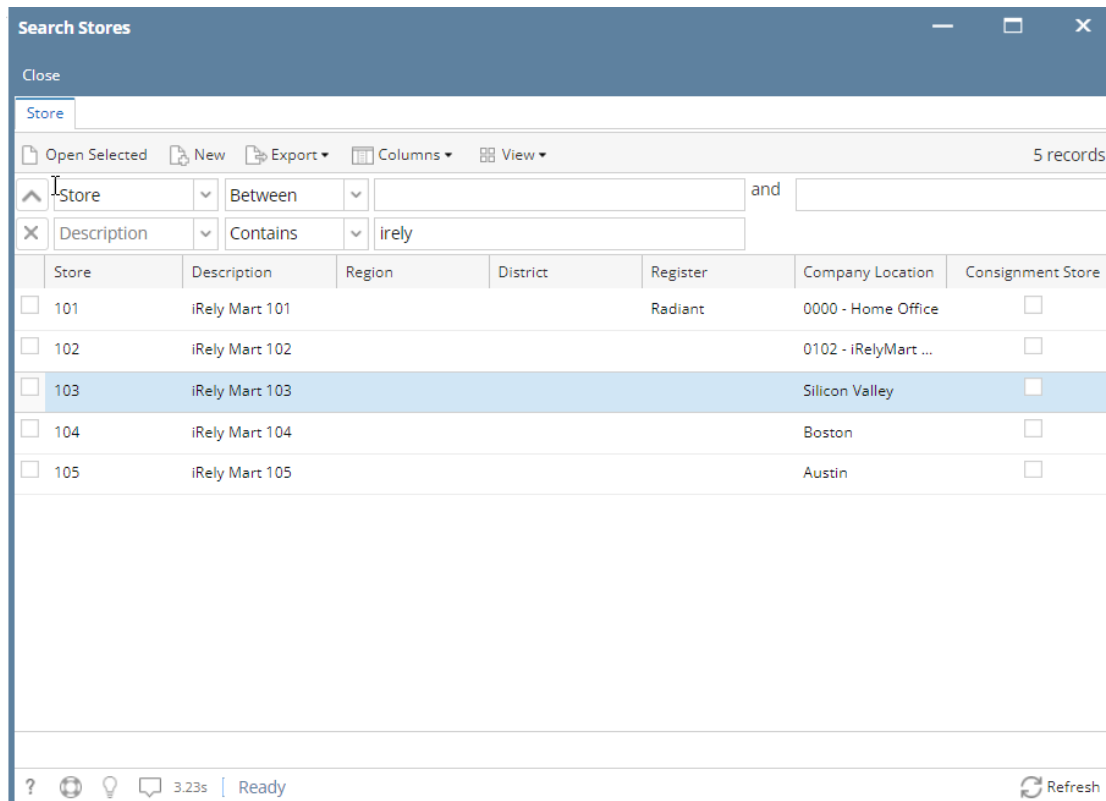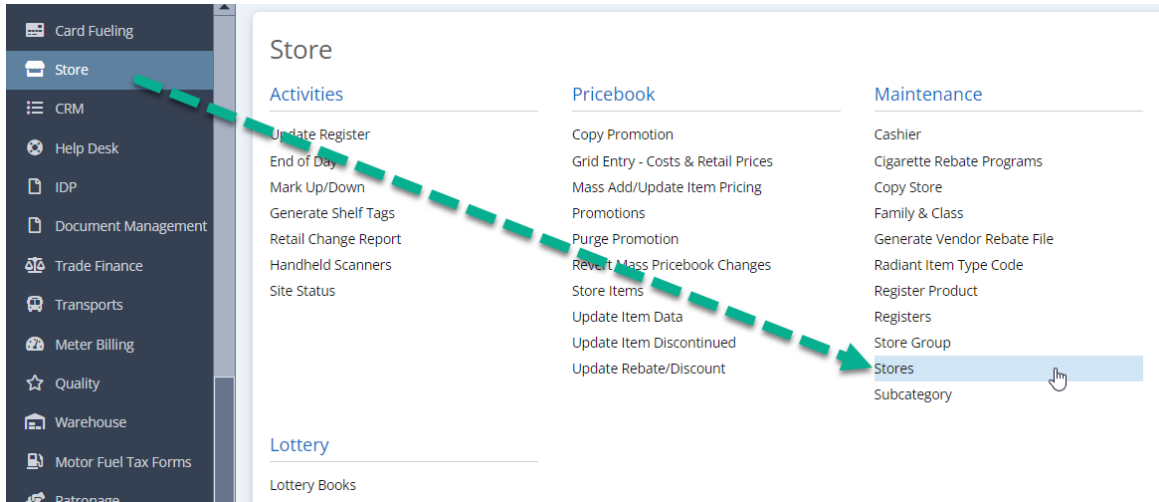
1. Enter the following:
   a. **Store No** - this will serve as the name of the store.
   b. **Description** - enter any that describes your store
   c. **Location Code*** - Lets you select the location based on the Company Locations setup
   d. **Lottery Setup Mode** - if checked, it will be used to 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

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

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

Remove   Export ▾   View ▾   Filter (F3)

	Department	Tobacco
☐		☐

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

Remove   Export ▾   View ▾   Filter (F3)

	Category	Register Code	Fuel
☐	07-00-00	7000	☐
☐	03-00-00	0300	☐
☐	02-00-00	0200	☐
☐	04-00-00	0400	☐
☐	01-01-00	1	☐
☐	01-02-00	2	☐
☐	01-03-00	333	☐
☐	21-00-00	2100	☐
☐	01-04-00	104	☐
☐	99-02-00	9902	☐
☐	01-05-00	105	☐
☐	27-02-00	2702	☐

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**

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**

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**

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**

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 #**

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

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

Change Fund Setup tab

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

Audit Log tab

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

Click **<u>Save</u>** to proceed.

Here are the steps on how to create a Store:

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

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

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