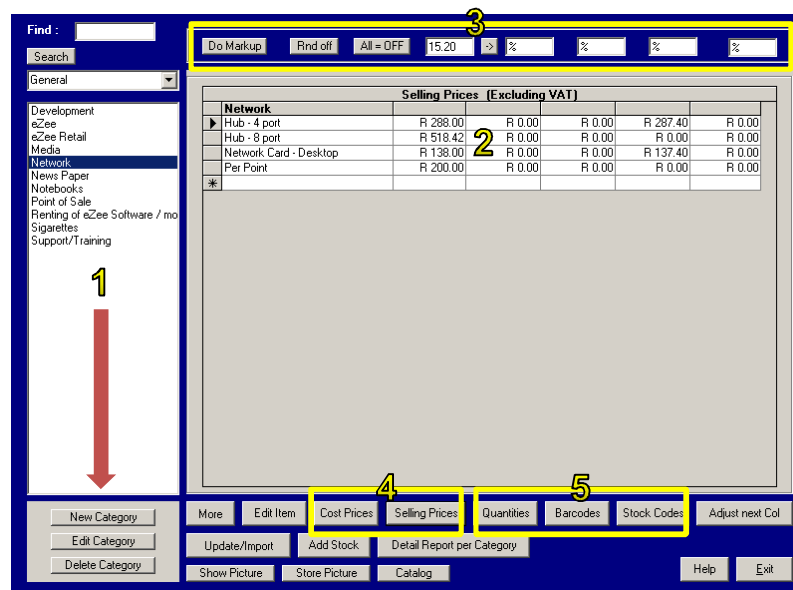


# STOCK/PRICES – Load stock and pricing

Stock is **automatically deducted** when the “Quote Accepted” box is ticked on the **Income/Sales** Screen, provided that you have selected items either from the price list on the income screen or the costing screen. Stock is also **automatically deducted** when you select items from the price list or if you use Point of Sale (additional module).



- 1 You set up your own stock categories. You can add categories as you go along. A Stock Category is like a main heading under which you will load your different stock items. Anything you sell or use to do a job should be listed here. It will make adding jobs/transactions on the Income screen easier and faster.

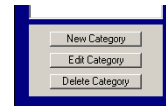
*In other words, you don't have to list only stock items. If you have, for instance, a company that does consulting or training, or if you have a medical practice, you can add things like Consultation as an item in your Stock/Price list, and enter the price you charge per hour or half hour as the selling price.*

*You would, in this case, either enter your cost price per unit as 0 or, if you want to really get technical, calculate your rent per month divided by 173.2, which is the accepted number of working hours per month, and put the result as your cost price. If you do it this way, you will get a pretty good estimated indication of profit per month on consultation and/or training.*





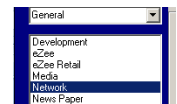
One can Add/Edit or Delete a stock Category. To add a Category – click On “New Category” The following appears at the bottom of the screen:



Type the description of the category as well as any headings you need.

*You can either use only the first column or up to five different columns, depending on what suits you best. If you sell beer in different quantities, you could, for instance, use the first column for 340ml bottles, the next for 500ml bottles, the third for 1 liters, and so forth. In this case you would enter the mentioned quantities as headings. If you decide to change the headings later, you can edit any category and do the desired changes.*

- 2 To add items under a category  
Click on the category in the list.  
Then click in the first open line in the grid and start typing your stock item description.



You can move to the next column by clicking in it or by pressing the right arrow on your keyboard.

Type in the cost price in the next column or columns. **Important to notice that you are entering “Cost Prices”!**

**Very important:**

**To save a line, move to the next line. The little pencil in the first column indicates that you are busy in the line. When you move to the next line, either by clicking in it or by pressing the down arrow on your keyboard, the information is saved and the pencil in the first column disappears. If you don't follow this procedure the software will not allow you to move on to any other steps or screens!**





- 3 After all the stock items have been entered one can enter the selling prices. At the bottom of the screen click on "Selling Prices". Then click in the appropriate price column and enter the selling price. By clicking "Other Settings" one customises additional features and security setting of the software



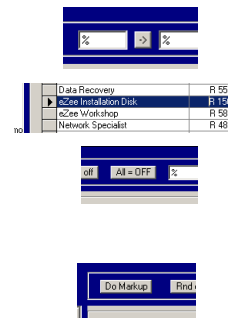
### Markup

If you want to increase your cost prices with a certain percentage to get sales prices, you can use the Markup command. To do this:

Click on an item in the grid. The frame with the markup command is displayed at the top.



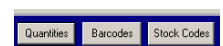
- Type a percentage, numbers only, in the first white box.
- You can click on -> next to the first percentage to let the system put the same percentage in all the boxes if you are using more than one column and you want to do the same markup for all the items in the active line. Remember, the active line is the one with the ► in the first column.
- If you want not only the active line, but all items in the grid to be changed, click on ALL = OFF to change it to ON.
- If you click on Rnd=Off a frame will be displayed where you can indicate to what number you want prices to be rounded.
- Now click on Do Markup to actually do the markup. Once done, a message will be displayed informing you of completion.

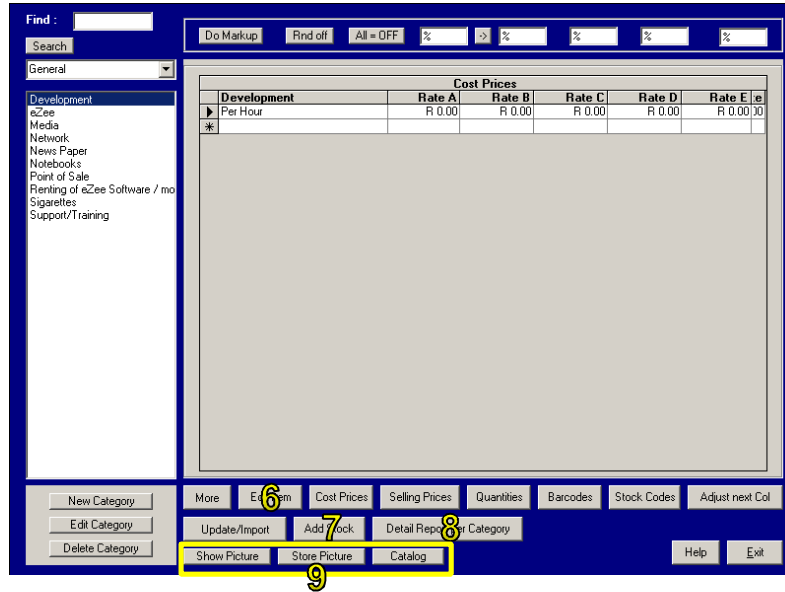


- 4 One can toggle between "Cost Prices" and "Selling Prices" as required to monitor pricing.

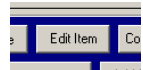


- 5 Use these buttons to view and edit "Quantities / Barcodes / Stock Codes". Should it be required click in the specific cell and type in what is needed. Remember to move to the next like in order for the entry to be accepted.





- 6 The “Edit Item” button allows one to edit various fields at one time, with regards to a stock item. Fill in the required value and click on “Save” or “Cancel”

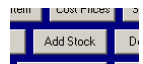


The Stock Item

“Cancel” or “Save”

The fields

- 7 The “Add Stock” button allows one to add stock quantities to the system. Fill in the required value and click on “Save” or “Cancel”



The Stock Item

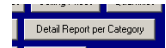
“Cancel” or “Save”

The Quantities

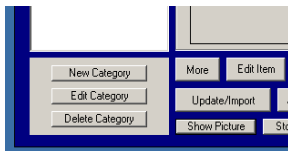




8 For a detailed report on all stock information click this button. Select the period for the report and the report will be created.



9 "Show Picture, Store Picture" and "Catalog" is used to store pictures against specific stock items. One can view a stock items picture and print a price list with the pictures (catalogue).



Toggle between "Show Picture" and "Hide Picture" to show or hide the picture.



To Add a Picture

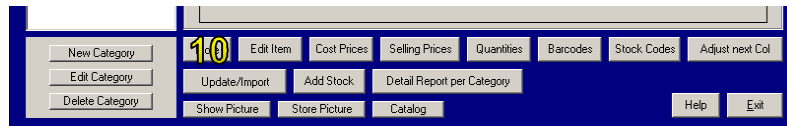
- Select the stock Category
- Click next to the required stock item
- Click "Store Picture"

	LIST ITEMS	
	Price	License
Development		
ezee		
2009/10 Monthly License Fee	R 0.00	R 0.00
Media		
Annual Support And Upgrade Fee	R 0.00	R 0.00
Network		
Business Management	R 0.00	R 0.00
News Paper		
Education Module	R 0.00	R 0.00
Notebooks		
ezee Rackless Facility - Monthly	R 0.00	R 0.00

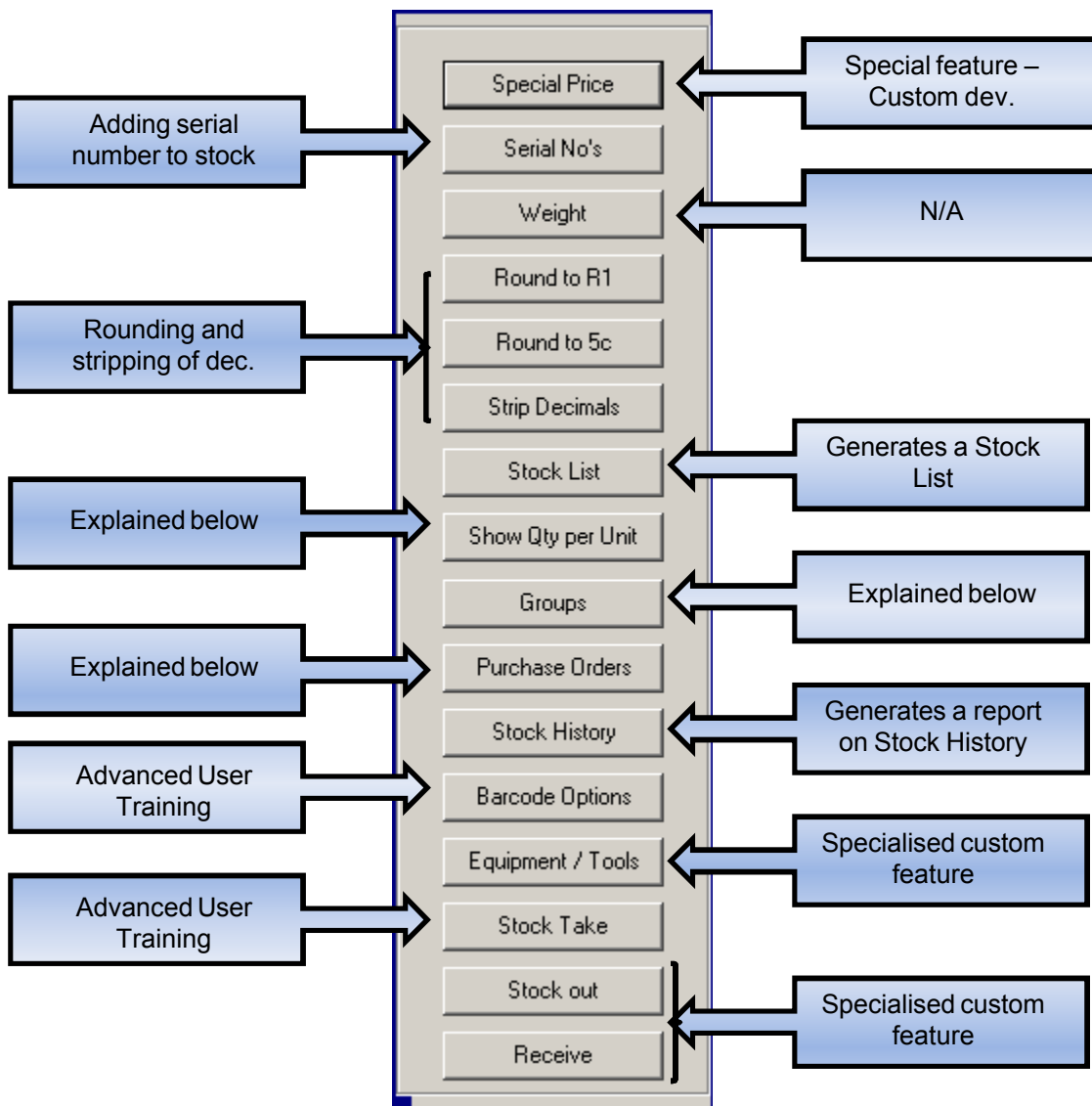
**VERY IMPORTANT**

Pictures need to *be as small as possible* (Thumbnails). Limit the size to the minimum. Keep the location of the pictures *as simple as possible*, for instance "C:\\" (in the root) or C:\ezee\data – nothing more than that. Pictures *increase the size of your database radically* – this is more *difficult to manage and maintain*





10 The “More” button shows a list of additional commands with regards to Stock/Prices. Some of the features are for advanced use and gets handled with training sessions and specialised training when the requirement arises. The following part high lights the business critical elements of the “More” – commands.





Show Qty per Unit

eZee allows you to keep track of stock levels per line. In other words, if you have, eg, loose bottles in the first column, six packs in the next, crates of 24 in the next and so forth, you can click on this button to type in the different quantities.

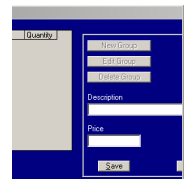
Based on the mentioned example, you would type a quantity of 1 in the first column, 6 in the next one, 24 in the next one and so forth. If you then open a six pack when your loose bottles are finished, you do not have to transfer stock manually. You can still see the total stock you have by clicking on Stock List (also in the More frame shown above).

Groups

Instead of selecting items one by one when you do costing on a project or job, you can set up Material Groups, and add all the items in the group with a single click. All you need to do then is change quantities.

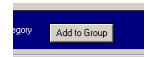
#### Create/Edit the Group

- Click “New Group” or select existing group and click “Edit Group”
- Type group name in under “Description”
- Calculate the cost manually and then type in a selling price for the group under “Price”.
- Click “Save”



The group name will now appear in the top left hand side of the screen.

- Highlight the group name
- From the stock categories select the items to go into the group by clicking on the price and the click on “Add to Group”. The item will be added to the group list – top centre screen next to the group name.
- Continue adding stock items needed to create the group
- Add the quantities needed of each item



Description	SubCategory	Quantity
Media - Courier Charges	Media	
Network - Hub - 4 port	Network	
Network - Hub - 4 port	Network	

When done creating groups click on “Exit”. These groups will be available in “Income/Sales” when a quotation or invoice is generated.

Purchase Orders

#### Future Development





*The “More” button shows a list of additional commands with regards to Stock/Prices. Some of the features are for advanced use and gets handled with training sessions and specialised training when the requirement arises.*

