

# **Matrix Stock Records**

Customer Services Sparkstone Technology Ltd 2016

Page **1** of **11** 



## Contents

Matrix Stock Records	
Contents	
Introduction	
Objectives	
Conventions Used	
User Access	
Matrix Records	
Creating Matrix Records	
Amending Matrix Records	
Assign Matrix to Stock Record	
Matrix Stock Records	
Amending Prices – Stock Screen	
Matrix Information Window	



### Introduction

This document outlines the workflow for the creation of matrix and attaching to stock records within the Sparkstone Retail EPOS System. These notes are designed to complement the training that you will have received on the Sparkstone Retail EPOS from a Sparkstone training consultant or system administrator. They are not intended to be a complete overview of the software but are designed to assist you at a later stage when you are away from the training session.

These notes have been compiled to reflect the configuration of the Sparkstone EPOS system at your site and as such may only contain information pertinent to the operations that you require. If additional modules are purchased at a later date, training notes will be provided as appropriate on completion of the associated training course.

#### **Objectives**

To provide an overview of the processes involved in creating stock records using the matrix module. The matrix module provides variation of a product i.e. size and colour grouped together under a single stock record.

For the purposes of this document we will show the processes from within the Back Office for the creation of matrix, stock records assignment and processing functionality . Some of this functionality can be undertaken within Front End Tilling (FET).

#### **Conventions Used**

Menu paths will be indicated throughout this training manual in bold.

For example:

#### Back Office | Product file | Stock Records

Indicates that you should access the Stock Records window from the Back Office using the Product File on the drop down navigation menu.

Within the software we will be selecting options visible from the relevant screens these options can also be selected using the menu bar within each screen.

Sparkstone	Retail Back Office		
Product <u>F</u> ile	Stock Movements	<u>P</u> urchasing	Sales <u>M</u> anag
Stock Red	ords	1	

#### **User Access**

This document assumes that the user has full access to the functions detailed below.



## **Matrix Records**

### **Creating Matrix Records**

#### Matrix records are setup by going to the **Back Office | Product File | Stock Matrix**:

💭 Matrix Setup				
Navigation View				
Matrix Name	Matrix name			Active
	Matrix axis	Value	s for this axis	
Name Stock	Name Grid Posit	on Order	Short Code Name	
	Name Each axis has a fixed position on the displayed matrix grid. You cannot add an unused axis afte has been applied to stock.	r a matrix		Add
	Stock using this matrix Load			
	Stock Code Name		Default C	ategory Name
Active O Inactive O All				× *
Delete	Ø	Insert 🖊 Ed	lit 🗸 ок 🗙	Cancel Back 🔊

This is the standard screen that appears by default.

There is an option to create a matrix per stock record which uses a template function. This will be discussed later in the document.



To create a new Matrix, Press 'Insert', type the Matrix name i.e. Shirts.

Matrix Setup									
vigation View									
latrix Name	P	Ma	atrix name SHIRTS						Active
		Ma	atrix axis			Values	for this axis		
ame Stock			Name	Grid Position		Order	Short Code	Name	
	<u> </u>	1	Size	Horizontal	6.5				<u> ×</u>
		2		Vertical	38 Y				
		3		List 1					
		4		List 2					$\bigtriangledown$
		5		LIST 3					
					=				
		1	Name Size						
		-	and a win have a fixed and	tion on the					
		di	isplayed matrix grid.	uon on the					
									-
		Yo	ou cannot add an unused as been annlied to stock.	i axis after a ma	trix		M	Madium	
		110	as been applied to stock.			1	M	Mealum	Add

Press 'TAB' key to move to the next field. Enter Matrix axis name i.e. Size

 $\ensuremath{\mathsf{Press}}$  `TAB' Key and enter Values for axis name using Short Code and Description i.e. M - Medium.

Press 'TAB' or select 'Add' button and repeat for additional Matrix values as required.

Select Matrix axis 2 and repeat entries as above i.e. Colour axis created.

vigation View										
Matrix Name	•	Ø	Matr	rix name SHIRTS						Active
			Matr	rix axis			Values	for this axis		
lame	Stock			Name	Grid Position		Order	Short Code	Name	
			1	Size	Horizontal	4.5	1	W	White	<u>~</u> ×
			2	Colour	Vertical					•••
			3		List 1					
			4		List 2					-
			5		List 3					
			Na	me Colour						
						_				
			Eacl	h axis has a fixed po	sition on the					
			disp	layed matrix grid.						
			You	cannot add an unus	ed axis after a ma	trix				<b>Y</b>
			has	been applied to stop	k.		2	В	Black	Add

Then press 'OK' when complete.



#### **Amending Matrix Records**

Using the edit function you can add/amend Matrix axis. However the function to add an additional axis is only available where the Matrix Record has not been used (assigned) to a stock record.

Values for the axis points can be created, amended and deleted. Deletion via the Red Cross is only available where the matrix Record has not been used (assigned) to a stock record.

Matrix Setup						- • •
Navigation View						
Matrix Name	Matrix name SHIRTS					Active
	Matrix axis		Values	for this axis		
Name Stock	Name	Grid Position	Order	Short Code	Name	
SHIRTS 0	1 Size	Horizontal	1	м	Medium	
	2 Colour 3 4 5 Name Size Each axis has a fixed po displayed matrix grid.	Vertical List 1 List 2 List 3	2 3 4	S L XI	Small Large X Large	
	has been applied to stop	k.	1	М	Medium	Add
	Stock using this matrix	LOad				
	Stock Code Name	ř.			Default Ca	ategory Name

Stock – number of records using this Matrix

Grid Position – use the icon 5 to toggle the Horizontal and Vertical axis i.e. Size/Colour becomes Colour/Size.

Order – select the value and use the arrows to sort the order the values are displayed.

NOTE: Any additions or amendments within this screen will be reflected against every Stock Record that is assigned to the Matrix Record.



### **Assign Matrix to Stock Record**

To create a matrix stock record the select **Back Office | Product file | Stock Records** 

Within the window create the stock record as normal. Once the product has been created and saved the select 'Edit' and tick the matrix box.

Stock Reco	rds		
<u>Print</u> <u>V</u> iew	<ul> <li><u>N</u>avigation <u>Options</u> Extra Information Buying</li> </ul>	Information	
	P Q Reference POLO	Q Short description Polo Shirt	View
Code POLO	Description Description Polo Shirt		Purchase Details Sort Keys
	☑ Active ☐ ⊻ar. valu	e 🗌 2nd hand 🛄 Tailored 🛄 Matrix 🛄 Assembly 🗐 Web 🗐 SNT (Sales)	Keywords Categories
	Gross sell price 29.99	VAT     1     Net sell price     Points     Base     Bonus       5.00     24.99     116     116     1     1	Miscellaneous Notes and Picture

The following screen appears which lists the available matrix records (active).

💭 Ар	ply Matrix						?	×
Select	t a matrix		Axes for s	elected matrix				
Code	Name							<u>^</u>
1	HANDLERBARS							<b>x</b>
2	HANDLEBAR		Values for	r this axis		Inc	clude	
3	COLOUR		Code	Name		۵	None	
4	SHORTS		0000	Nume			Horic	
5	RING							
6	DRESS							
7	STYLISTS							
8	SPECBIKES							
9	UK BRA SIZES							
10	BEDS							
11	08							
12	BRA							
13	HATS							
14	SIZE DEMO							
15	COLOUR DEMO							
16	FRAME							
17	EDITION							
18	FJ							
23	10120							
26	MAZE							
27	LIME							-
28	SHOE							Ë.
29	8836							
30	FRED PERRY- ALL PRODUCTS	-	Code	Name		100		
•	•						Add	
		Î	Fashio	on .	V OK	×	Cance	
			Diction	ary	UK		cance	



Select the matrix required and you will have the option to select/deselect the required matrix points for the product.

🔘 Арј	ply Matrix							?	x	
Select	a matrix		Ax	es for s	elected matri	ix				
Code	Name		1	Size			Horizonta	l Axis	<b>_</b>	
6	DRESS	-	2	Colour			Vertical A	xis	-	
7	STYLISTS		Va	lues for	this axis		In	clude		
8	SPECBIKES			Code	Name		All	None		
9	UK BRA SIZES		1	W	White		~			
10	BEDS		1	vv	white					
11	08		2	в	Black					
12	BRA									
13	HATS									
14	SIZE DEMO									
15	COLOUR DEMO									
16	FRAME									
17	EDITION									
18	FJ									
23	10120									
26	MAZE									
27	LIME									
28	SHOE									
29	8836									
30	FRED PERRY- ALL PRODUCTS									
31	SG									
32	PAINTS									
33	ARROWS									
34	BOW		1					<b>&gt;</b>		
35	SHIRTS	-	Co	ode	Name					
4	•							Add	_	
				Fashic	on ary	🗸 ок	×	Cance	el	

If the required value is not available, new values can be added using the fields available and selecting the 'Add' button.



The matrix values added at this stage will be added to the matrix record. They will be available to be added to any new/existing stock record but will not update any existing stock records using the same Matrix Record.



Values added via the above appear as 'Greyed out'. They are still valid axis values for future use.

💭 Matrix Setup						
Navigation View						
Matrix Name	Matrix name SHIRTS					Active
SHIRTS						
News Disk	Matrix axis		Valu	es for this axis		
Name Stock	Name	Grid Position	Ord	er Short Code	Name	
SHIKTS Z	1 Size	Horizontal	s 📉 🚺	W	White	
	2 Colour	Vertical	2	В	Black	
	3	List 1	3	R	Red	<u>.</u>
	4	List 2	4	Y	Yellow	
	5	List 3				· · · · ·

Upon successful assignment of a Matrix record the 'Matrix Information' option is available within the Stock section of the stock record window.

View transactions Duplicate Print labels Places Web stock options Matrix information
Duplicate Print labels Places Web stock options Matrix information
Print labels Places Web stock options Matrix information
Places Web stock options Matrix information
Web stock options
Matrix information
Hadix mornadon
List on eBay
List on Amazon

This option is also available using the dropdown menu selection:-

🔘 Stoc	k Record	s					
<u>P</u> rint	<u>V</u> iew	<u>N</u> avigation	<u>O</u> pt	ions	E <u>x</u> tra Information	Bu	Buying Information
POLO				Stoc	Movements	►	Short description Polo Shirt
Code		Description		Stock	Administration	•	Matrix information
FP1		Fred Perry T		Sales	Management	►	Assembly Template
FP5		Fred Perry T		Purc	hasing	•	Assembly Stock Options
POLO		Polo Shirt		Tran	saction History	►	Inactive stock management
POLO1		Polo Shirt		Dupl	icate		Min / Max / Ideal Maintenance
				Creat	te B Stock		



### **Matrix Stock Records**

#### **Amending Prices – Stock Screen**

Within the stock record screen the selling and cost price section reflects the latest amended matrix price. The stock quantity figure reflects the actual quantities in stock but the valuation does not reflect the true stock values. If you amend the selling price for a matrix stock record you will be presented with the following screen:-

Choose action for updating matrix sales prices
<ul> <li><u>1 Do not update</u></li> <li><u>2</u> Update all to new price</li> <li><u>3</u> Update all of same value to new price</li> <li><u>4</u> Update all proportionally</li> <li><u>5</u> Update based on factors</li> </ul>
🗸 ок

Based on the option selected you will then update the selling price for all the matrix points.

Matrix prices undated	
matrix prices updated.	ок
	<b>_</b>

If price lists are active the following option will also appear:-

Update for stock code in price lists?		Yes
	~	No

Similar screen(s) appear when amending the cost price.



## **Matrix Information Window**

This window shows details about each matrix point.

Show:	Matrix inform	nation for sto	ock code PO	.0							- • ×
Show:       Branch         Physical       Southampton         0       Medium         0       0       0       0         White 0       0       0       0       0         Black 0       0       0       0       0         Red 0       0       0       0       0         Description       Bar code       Bar code         Medium White       Generate       Generate         iell price       Vat code       SL LAC       Lead time Cost price       RRP       PL LAC       Supplier reference         27.99       1       0       10.99       0.00       PURCH       ✓       X Cancel       Back IP											
Physical       •       Southampton       •         0       Medum       Small       Large       Xarge         Whe       0       0       0       0         Black 0       0       0       0       0         Red 0       0       0       0       0         Red 0       0       0       0       0         0       0       0       0       0         0       0       0       0       0         0       0       0       0       0         0       0       0       0       0         0       0       0       0       0         0       0       0       0       0         0       0       0       0       0         0       0       0       0       0         0       0       0       0       0         0       0       0       0       0         0       0       0       0       0         0       0       0       0       0       0         0       0       0       0       0       0	Show:	Bran	ich								
0       Medure 0       0       Large 0         Whe 0       0       0       0       0         Black 0       0       0       0       0         Red 0       0       0       0       0         Red 0       0       0       0       0         Red 0       0       0       0       0         0       0       0       0       0         0       0       0       0       0         0       0       0       0       0         0       0       0       0       0         0       0       0       0       0         0       0       0       0       0         0       10.99       0.00       PURCH       Generate         27.99       1       -       0       10.99       0.00       PURCH         0       10.99       0.00       PURCH        Manufacturer reference         27.99       1       -       0       10.99       0.00       PURCH	Physical	- Sou	uthamptor	1		-					
White 0       0       0       0       0         Black 0       0       0       0       0       0         Red 0       0       0       0       0       0         Red 0       0       0       0       0       0         Red 0       0       0       0       0       0         Back 0       0       0       0       0       0       0         Percent       Fail       Percent       Cancel       Back 2	0	Medium 0	Small 0	Large 0	X Large 0						
Black 0       0       0       0       0         Red 0       0       0       0       0       0         Red 0       0       0       0       0       0         Description       Bar code       Bar code       Generate         Jell price       Vat code       SL LAC       Lead time Cost price       RRP       PL LAC       Supplier reference       Manufacturer reference         27.99       1       -       0       10.99       0.00       PURCH       Supplier reference         Quters       Extra       Percent       Edit       ✓ OK< × Cancel       Back	White 0	0	0	0	0						A
Red 0 0 0 0     Red 0 0 0 0     Red 0 0 0     Obscription Bar code     Medium White     Sell price     Vat code     SLAC     LAC     Supplier reference     Manufacturer reference     PLLAC     Supplier reference     Manufacturer reference     PLLAC     Supplier reference     Manufacturer reference     O     1     O     Edit     Vot     Cancel     Back	Black 0	0	0	0	0						
Description Medium White Bar code Bar code Bar code Generate Bar code Generate 27.99 1 ↓ ↓ 0 10.99 0.00 PURCH ↓ OK ★ Cancel Back ♥	Red 0	0	0	0	0						
Description     Bar code       Medium White     Ear code       Sell price     Vat code SL LAC       Lead time Cost price     RRP       PL LAC     Supplier reference       27.99     1       I     I       I     I       I     I       I     I       I     I       I     I       I     I       I     I       I     I       I     I       I     I       I     I       I     I       I     I       I     I       I     I											
L     Description     Bar code       Medium White     Bar code       Sell price     Vat code     SL LAC       Lead time Cost price     RRP     PL LAC       Supplier reference     Manufacturer reference       27.99     1     0       10.99     0.00     PURCH       ✓     OK     ✓ Cancel       Back     ✓											
L Description Bar code Medium White Sell price Vat code SL LAC Lead time Cost price RRP PL LAC Supplier reference Manufacturer reference 27.99 1 ↓ 0 10.99 0.00 PURCH ↓ Generate Vature Percent											
Description     Bar code       Medium White     Generate       Sell price     Vat code     SL LAC       Lead time Cost price     RRP     PL LAC     Supplier reference       27.99     1     0     10.99     0.00       Øuters     Extra     Percent     Edit     ✓ OK     X Cancel     Back											
Image: Contract of the second sec											
Image: Description     Bar code       Medium White     Bar code       Sell price     Vat code     SL LAC       27.99     1     Image: One of the second											
L Description Medium White Sell price Vat code SL LAC 27.99 1 ↓ 0 10.99 0.00 PURCH ↓ OK × Cancel Back ♥											
Content     Bar code       Description     Bar code       Medium White     Generate       Sell price     Vat code SL LAC     Lead time Cost price       27.99     1     0     10.99       0     10.99     0.00     PURCH       ✓     OK     X Cancel     Back											
Image: Self price     Vat code     Self price     Supplier reference     Manufacturer reference       Self price     Vat code     SL LAC     Lead time Cost price     RRP     PL LAC     Supplier reference       Self price     Vat code     SL LAC     Lead time Cost price     RRP     PL LAC     Supplier reference       27.99     1     .     0     10.99     0.00     PURCH     .       Øuters     Extra     Percent     Image: Extra     Percent     Edit     ✓ OK     X Cancel     Back											
Lead time Cost price     RRP     PL LAC     Supplier reference     Manufacturer reference       27.99     1     0     10.99     0.00     PURCH     ✓     OK     X Cancel     Back											
Description     Bar code       Medium White     Generate       Sell price     Vat code     SL LAC       27.99     1     0     10.99       0     10.99     0.00     PURCH       ✓     OK     × Cancel     Back											
Description     Bar code       Medium White     Generate       Sell price     Vat code     SL LAC       27.99     1     0     10.99       0     10.99     0.00     PURCH       ✓     OK     × Cancel     Back											
Description     Bar code       Medium White     Generate       Sell price     Vat code     SL LAC       27.99     1     0     10.99       0     10.99     0.00     PURCH       ✓     OK     × Cancel     Back											-
Description     Bar code       Medium White     Generate       Sell price     Vat code     SL LAC     Lead time Cost price     RRP     PL LAC     Supplier reference     Manufacturer reference       27.99     1     •     0     10.99     0.00     PURCH     •       Ø outers     Extra     Ø Percent     Ø Edit     ✓ OK     × Cancel     Back	•	1									
Medium White     Generate       Sell price     Vat code     SL LAC     Lead time Cost price     RRP     PL LAC     Supplier reference     Manufacturer reference       27.99     1     •     0     10.99     0.00     PURCH     •       Ø     Outers     Extra     Ø     Percent     Ø     Edit     ✓ OK     × Cancel     Back	Description									Bar code	
Sell price       Vat code       Sell LAC       Lead time Cost price       RRP       PL LAC       Supplier reference       Manufacturer reference         27.99       1       -       0       10.99       0.00       PURCH       -	Medium Wh	ite									Generate
27.99 1 • 0 10.99 0.00 PURCH • OK × Cancel Back ₹	Sell price	Vat code	SL LAC		Lead time	Cost price RRP	PL LAC	Supplier	reference	Manufacturer reference	1
Outers      Extra     Percent     Percent     Cancel Back	27.99	1 -		-	0	10.99	0.00 PURCH	-			
🖌 Outers 🖩 👘 🖌 Percent 🖉 Edit 🗸 OK 🗙 Cancel Back 🔁			vtra								-
Details	Outers	De	etails	Percen	t		🗸 Edit	~	ОК	× Cancel	Back 🕏

Within the 'Show: 'dropdown the following options are available:-

💭 Matrix informa	ation	for sto	5
Show:		Bran	1
Physical	•	So	U
Physical	-	ium	
Min			
Max		0	
Ideal		0	
Cost price		0	
Profit			1
Margin %	-		

Within this window you can amend the sell and cost price for an individual co-ordinate, a complete size or complete colour.