

TECH-1c Page | 1 of 2

Cost Profiling

Category	Technical
Course	Location Setup
Version	1.1
Client	Generic
Software	2.18.4.68

Use cost profiling if your business uses zone pricing, but you have a store that will sell certain products at a different cost compared to others stores in that zone.

Procedure to Manage Cost Profiling for a Store

Hints and Tips

- ✓ Profile overrides are useful when you have several stores in a zone, but selected stores need different costs or you'll let them manage their own costs.
- ✓ You can use cost profiling in combination with retail profiling.
 - Refer to [TECH-1d HOS Retail Profiling Fact Sheet](#).
- ✓ The profiling screens are the only place you can view the alternate prices set for a store; HOS pricing & the stock screen only show the zone prices.
- ✓ From 2.18.4.68, Profiling shows in BOS Location Setup (for Admin users), to check what has gone down from the HOS.
 - Any edits done on the BOS will be overridden by HOS.
- ✓ You can override the zone cost on multiple levels, such as:
 - selling all products in a selected department at the cost prices set for another zone
 - selling a specific product at a different cost price compared to the other stores in the zone
 - letting a store maintain their own cost prices in a selected department, such as fruit and veg.
 - Note: This override type only applies to existing lines; new lines are hosted with a one-off cost sent from HOS.
- ✓ Every store has a default zone against them, based on the entry in Store Details. DO NOT DELETE THIS ENTRY.

<p>1. From the HOS System menu, select Location Setup.</p>								
<p>2. Select the Location that you want to define a profile for. <i>*You can only set up profiles at the store level.*</i></p>								
<p>3. Double-click the Cost Profile icon. <i>*Any previously created profiles are displayed in the grid.*</i></p>								
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TECH-1c Page | 2 of 2

Hints and Tips

- ✓ To prevent errors, it's recommend that you keep the **Effective Date** that's populated from HOS Pricing, as the system can't handle multiple future dated changes.
- ✓ The **Alternative Filters** can be used instead of or in combination with a **Department Hierarchy Filter**, to narrow the application of the override.
 - e.g. to apply a zone override to all products in the Grocery department that are supplied by the default supplier 'x'.
- ✓ **Hierarchy grade** is used to set the Store Grade for the selected hierarchy (if configured in your business); so this means that only products with a lower or equal grade can be ordered by this store.
- ✓ Profiling is transferred and applied to stores as part of normal HOS export and store scheduled tasks.
- ✓ Overrides are applied in numerical sequence, so the last override that applies to each product (based on the criteria) is what will be used to generate the price for the product.

Example: product ABC which belongs to Dept A, Sub Dept B, Range C:

- override 1 - Default: use zone 1
- override 2 - Dept A use zone 2
- override 3 - Dept A, SubDept B - Margin 30%
- override 4 - product ABC – Store Cost

Product ABC will keep store cost as that is the last override that applies to it, regardless of what prior override may have applied to it.

<p>5. Complete the following steps to create a new profile:</p> <ul style="list-style-type: none"> • Click New. • Set the rules for the profile override; the table below lists common overrides: <p><i>*See Hints and Tips.*</i></p> <table border="1" style="width: 100%;"> <thead> <tr> <th style="text-align: left;">To:</th> <th style="text-align: left;">then:</th> </tr> </thead> <tbody> <tr> <td>set an entire category to a different zone cost (e.g. cigarettes)</td> <td>select the Override Type option New Zone. Select the Zone to use. Select the criteria to override.</td> </tr> <tr> <td>set a specific product to a new cost price</td> <td>select the Override Type option New Cost or Cost Increase. Select the default Zone for the store. In the Override Value field, type the new cost price or dollar increase. <i>*This is case cost GST inclusive.*</i> Select the Sub-Range or Stock Code that will be the new cost. <i>*The profile only applies to the default supplier.*</i></td> </tr> <tr> <td>let the store set their own cost for a category (ignore hosted zone costs)</td> <td>select the Override Type option Store Cost. Select the default Zone for the store. Select the criteria that will use store costs.</td> </tr> </tbody> </table> <p>Click Save.</p> <p><i>*The new override is added to the list.*</i></p>		To:	then:	set an entire category to a different zone cost (e.g. cigarettes)	select the Override Type option New Zone . Select the Zone to use. Select the criteria to override.	set a specific product to a new cost price	select the Override Type option New Cost or Cost Increase . Select the default Zone for the store. In the Override Value field, type the new cost price or dollar increase. <i>*This is case cost GST inclusive.*</i> Select the Sub-Range or Stock Code that will be the new cost. <i>*The profile only applies to the default supplier.*</i>	let the store set their own cost for a category (ignore hosted zone costs)	select the Override Type option Store Cost . Select the default Zone for the store. Select the criteria that will use store costs.
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<p>6. Use the UP/Down arrows to set the order you want the overrides to be applied in.</p> <p><i>*See Hints and Tips.*</i></p>									
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