Central Price Book

Version 4.x

User's Guide

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Service Station Computer Systems, Inc.
Salinas, California 93901
(831) 755-1800
Fax (831) 784-4782
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Introducing Central Price Book

Central Price Book™ extends the functionality of the Computerized Daily Book™ by helping you manage your enterprise pricing from a central location, for example, a PC in the pricing manager's office.

CPB processes and manages pricing information for inventory items, allowing additions, updates, deletions, and transfers among CDB sites that are grouped by pricing zones. You define these zones to meet the needs of your business. (How Central Price Book's zone/site structure influences CDB pricing behavior can be found in "CDB Zones and Sites" on page 1-8.)

CPB is a web-based application. It has been tested on the following browsers: Mozilla Firefox, Google Chrome, and Microsoft Edge. It is accessed from the SSCS Portal through the SSCS Corporate website. (See "Logging Onto the SSCS Portal" on page 3-1 to learn how.)

Important **Because Central Price Book (CPB) extends the functionality of the Computerized Daily Book (CDB) back office, it is imperative that the reader of this user guide have AT LEAST an intermediate understanding of how to use the CDB back office software.**

In this chapter we'll provide a conceptual overview of Central Price Book™ (CPB) and how it works with the Computerized Daily Book to keep your price book accurate and up-to-date. If you want to skip the introduction and start using the program, please begin with "Required Setup in the Computerized Daily Book" on page 2-1. Once you follow those instructions, read "Accessing the SSCS Portal" on page 3-1 to how to log onto and open Central Price Book.

When you start working with the program:

- Read about the features on the CPB Adjust menu in "Adjust Menu" on page 4-1.
- Read about CPB's Reports in "Reports" on page 5-1.
- Read about the features on the CPB Setup menu in "Setup Menu" on page 6-1.
- Read about CPB Help in "Help Menu" on page 7-1.
- A rundown of this user guide's conventions can be found in "Appendix 1: User Guide Conventions" on page A1-1.
- A rundown of the software's operating conventions can be found in "Appendix 2: CPB Software Operating Conventions" on page A2-1.

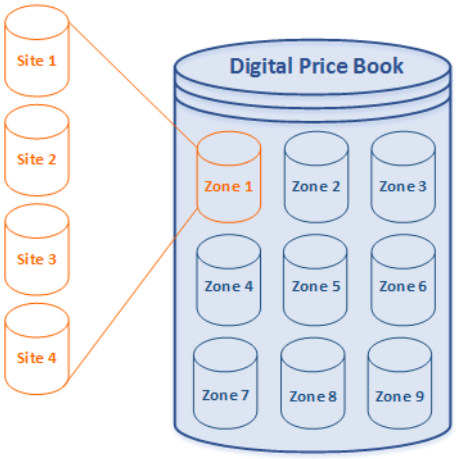
Pricing Structure, Design and Behavior

The Digital Price Book

To understand Central Price Book, its relationship to the Computerized Daily Book, and how they affect and are affected by pricing events and the work you perform, we'll start with a concept outside of, but dependent on both applications: the digital price book. This is what we call the aggregation of pricing information for the inventory items in your stores across all pricing zones and sites—it's a price book, but an electronic one.

While the digital price book affects and is affected by activity in the CDB and CPB, it isn't fully part of either. It's a construct—a container, if you will—of all the pricing information resident in your operation.

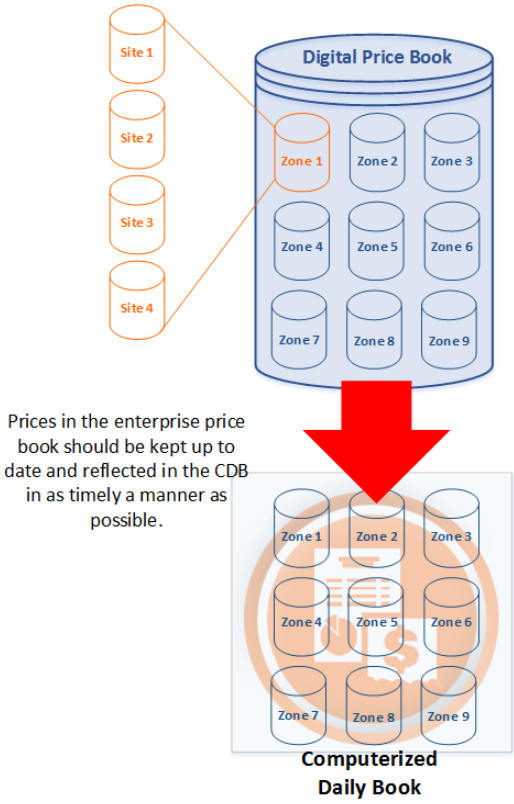
The Digital Price Book



The above image represents your digital price book as an electronic "cannister" containing the pricing information for each site in your enterprise, including list price, margin, item, description, department, and related information.

Sites are organized into pricing "zones" comprised of one or more sites' item pricing information—the cannisters within the cannister shown above in orange. We'll talk more about the set up and management of zones and sites in "CDB Zones and Sites" on page 1-8, but for now make note that the current pricing information in the CDB should attempt to match the most recent pricing information in the digital price book. Keeping both is sometimes not possible, but that should be the ideal, something we've attempted to represent below:

The Digital Price Book and the CDB



Price Processing Workflow

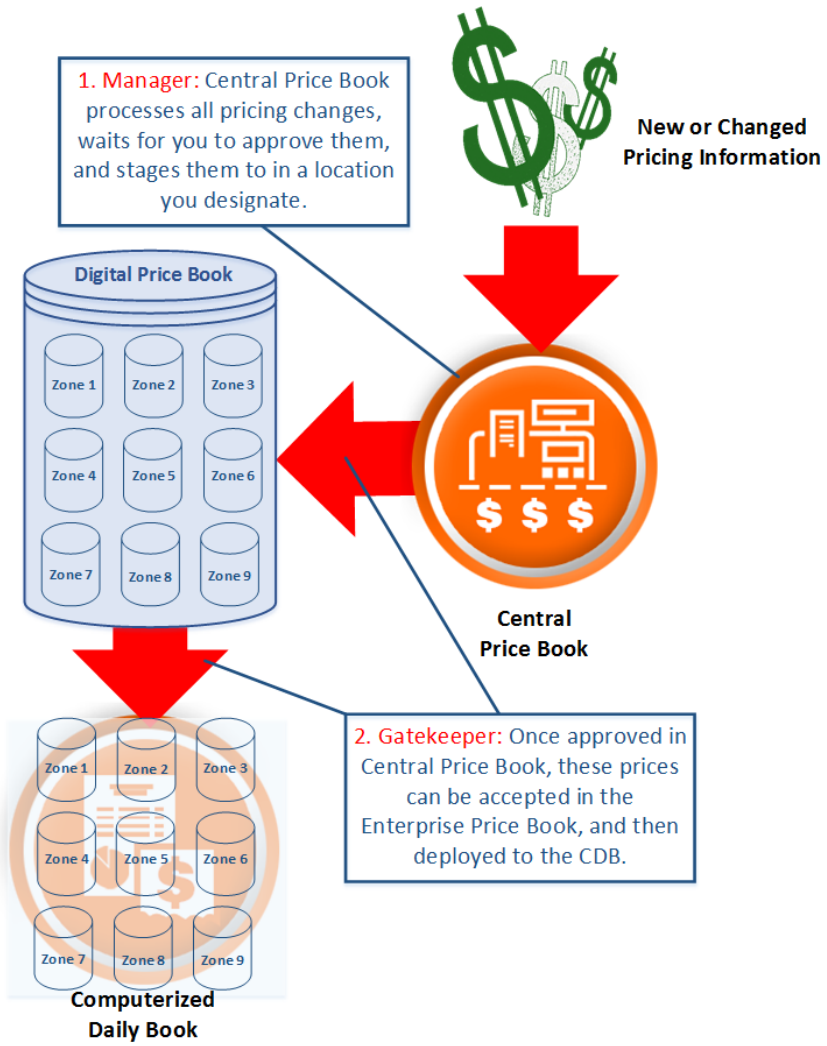
Keeping pricing information current across the enterprise is challenging because prices and the inventory mix of items in your store change often and from multiple initiation points. The larger the enterprise, the more challenging it is to stay on top of changes.

Central Price Book helps. Before additions, changes, deletions, or other pricing movement can be recorded in the CDB—even when that activity originates within the CDB—CPB must analyze and process the activity, then stage it in the appropriate pricing zones for review before deployment.

This is how it ***manages*** your price book.

CPB also functions as a pricing ***gatekeeper***. It gives the user the opportunity to review all pending pricing changes in the digital price book and what zones/sites they will affect before accepting or rejecting them. Here's the concept in basic terms:

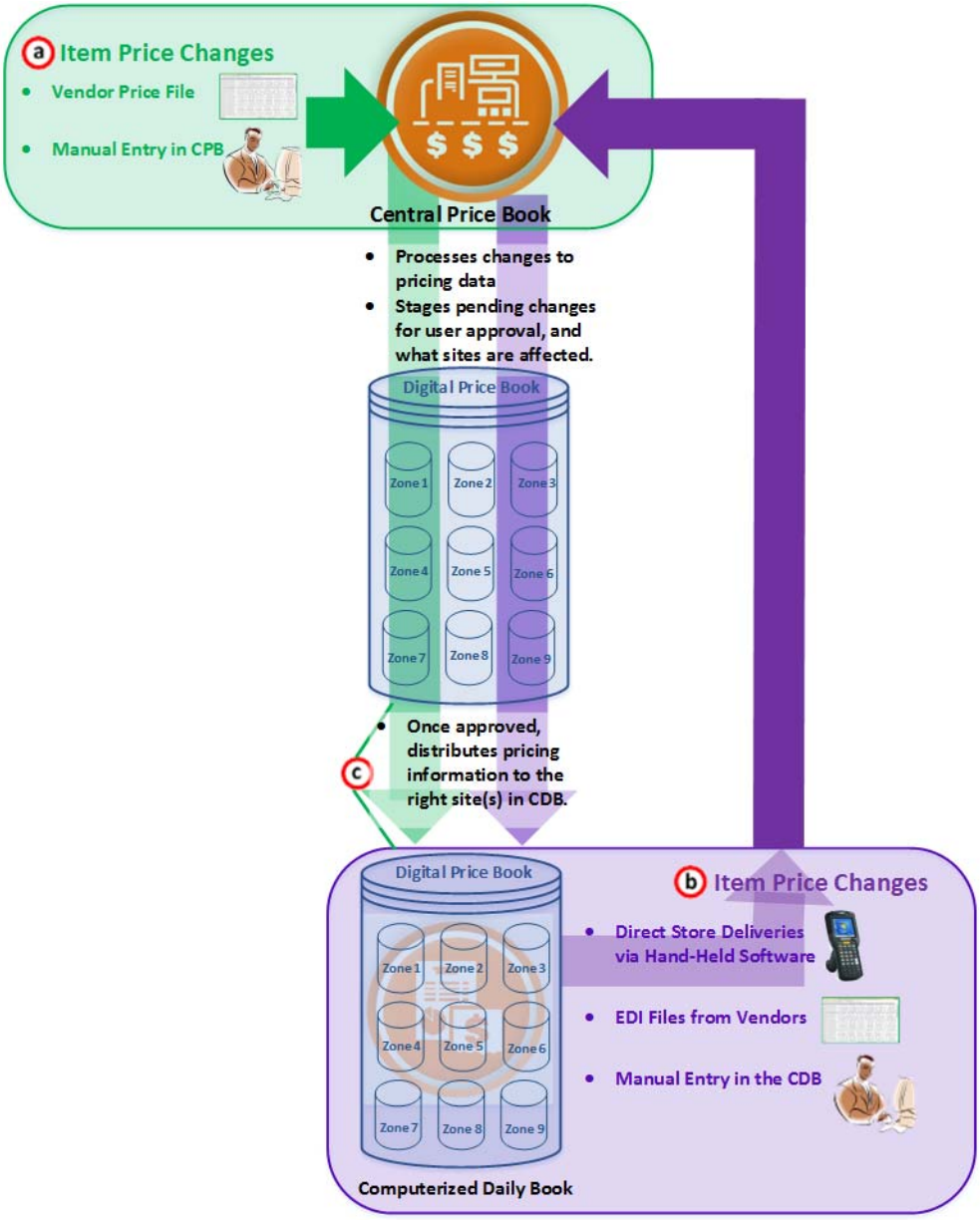
The Digital Price Book, the CDB, and CPB



We kept the above diagram simple to emphasize Central Price Book's role in **(1)** managing and **(2)** gatekeeping. In reality, though, item price changes, additions, and deletions do not enter the price book from a single source on a regular schedule, and aren't really all that linear in how they are passed through: they can come from different places—including the CDB—and at irregular times.

So let's take the above simplified view and add in the real world variables that affect pricing management, from where they originate, and the "directions" in which they flow.

Pricing Flow in the Digital Price Book



As you can see, pricing changes originate from two sources: Central Price Book and the Computerized Daily Book.

Item Price Changes Generated from Central Price Book (a)

Though Central Price Book's primary function is that of the manager and gatekeeper of the digital price book, you can initiate price changes from it:

- By accepting a vendor item (price) file, as seen in "Vendor Import" on page 6-5. This is the only path available for moving price data from the vendor's file to your digital price book. You'll use Central Price Book's other features to review the changes and

accept them ("distribute them") into the CDB and its appropriate sites and zones (c).

- Though not highly recommended by SSCS, you can add new items into your digital price book through Central Price Book and accept the changes, which are nw positioned to be distributed into the CDB (c).

Item Price Changes Generated from the Computerized Daily Book b

You can generate pricing updates in the Computerized Daily Book, although they must be curated by Central Price Book before they are accepted into the digital price book (in the previous illustration this pricing flow is represented by the purple arrow).

Here are the ways that price changes can be initiated within the CDB:

- As part of a scanned Direct Store Delivery using SSCS's Hand-Held Software (HHS).
- Through the importing of a vendor's EDI file.
- By manual entry in the CDB.

In each of these cases, changes are sent to Central Price Book first, where they are staged for entry into the digital price book and deployment to the appropriate sites in the CDB. In other words, changes originate in the CDB, but have to be processed by Central Price Book before they can be sent back to the CDB as approved changes.

Deploying to the CDB (c)

Remember, the ultimate destination for timely, accurate prices is the CDB, which you use to manage the daily work in your store. Keep your digital price book as up to date as possible for deployment to the CDB using Central Price Book.

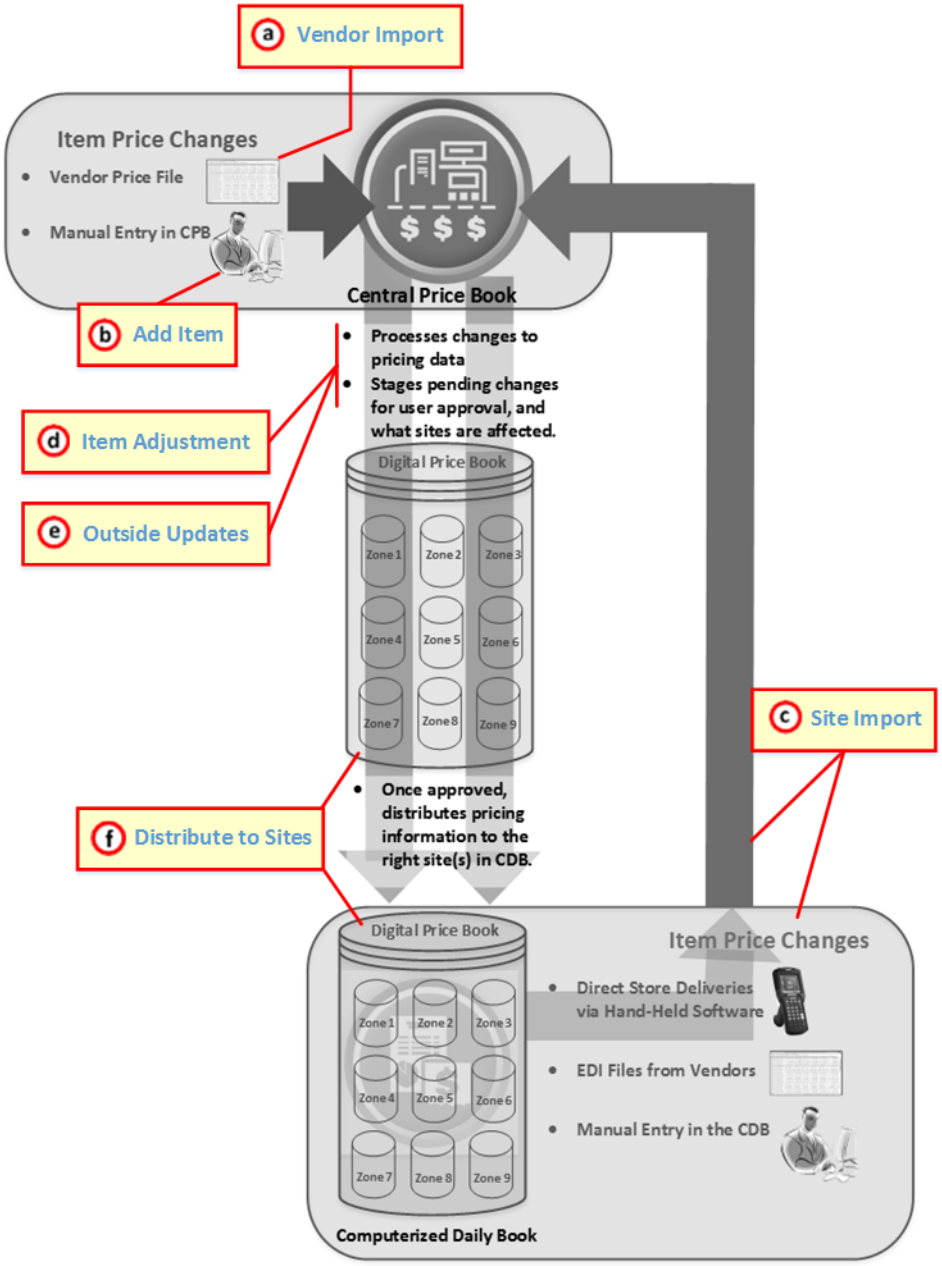
The Role of CPB's Features in Price Processing Workflow

So far we've:

- Described the digital price book and its relationship to the Computerized Daily Book (see "The Digital Price Book" on page 1-1).
- Talked about typical pricing origination and flow in general and specific terms (see "Price Processing Workflow" on page 1-3).

Now we're going to call out specific Central Price Book features. We're going to start by taking the previous illustration and adding in callouts to identify each of Central Price Book's major features and where they "fit" into enterprise price flow (this illustration is best viewed with color output):

Pricing Flow and CPB Features



With the above image as a guide, here's a brief description of the Central Price Book features we've called out and their digital price book management:

Vendor Import (a) — Imports pricing and pricing-related information from the vendor's pricing file after initial vendor setup. Vendor Import is usually initiated on a regular basis, often daily. See "Vendor Import Setup" on page 6-3 for more information.

Add Item (b) — Adds items to the digital price book for the zones/sites you select. They are pushed out to the selected zones and sites in the CDB using the Distribute to Sites feature (see "Distribute to Sites" on page 6-8).

Site Import (c) — Imports pricing changes into CPB that have been initiated in a CDB site or sites and are now staged in Outside Updates ready to be pushed out to the CDB using

the Distribute to Sites feature. See “Site Import” on page 6-6 for more information on this feature.

Item Adjustment (d) — Allows you to change one or more items based on pricing criteria you define. These changes will register in the Outside Updates screen before they are committed to the digital price book. See “Item Adjustment” on page 4-1 for more information on this feature.

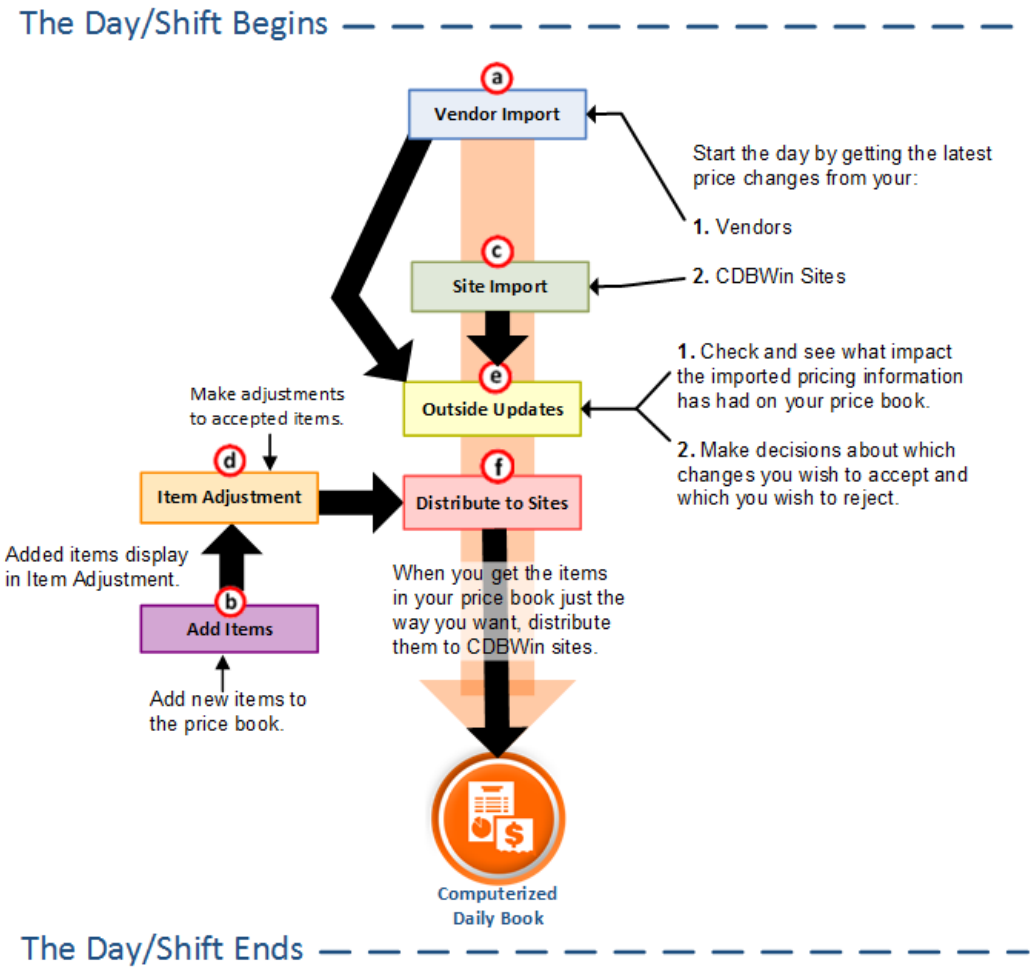
Outside Updates (e) — Lists proposed changes in pricing information that have originated from a vendor pricing file or a site import. Stages the changes so you can examine them before editing, accepting, or rejecting them. Once approved, you then push them out to the sites using Distribute to Sites. See “Outside Updates” on page 4-41 for more information.

Distribute to Sites (f) — Pushes staged changes to the CDB sites and zones after you have reviewed and accepted changes. See “Distribute to Sites” on page 6-8 for more information.

Negotiated Cost Manager (Not Pictured) — Set up costs you have negotiated with the vendor so you can compare them to actual purchase costs on that same items. A comparison report can then be run calling out those items that do not match the negotiated cost, a powerful tool for dealing with your vendors. See “Negotiated Cost Manager” on page 4-52. For the Negotiated Cost report, see “Negotiated Cost” on page 5-1.

Typical Order of Daily Pricing Procedures with CPB

Though the Central Price Book is designed with enough flexibility to handle your operation’s specific daily procedures, the following diagram suggests a typical daily order in which its features may be used. To help you match a CPB feature with our explanation in the previous section, we use the same reference letters. Remember, this is just one suggestion as enterprise pricing is anything but a “one-size-fits-all” proposition:



CDB Zones and Sites

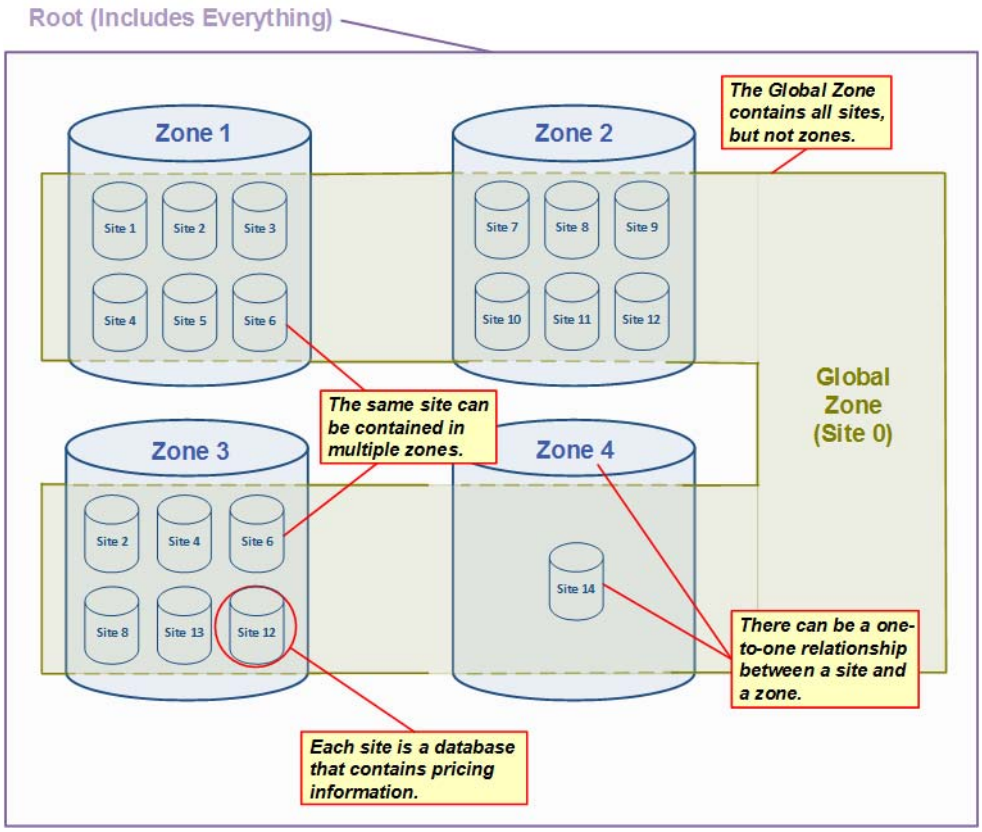
The CDB's user-definable zones are targets for the pricing additions and changes passed on by CPB. Each zone is assigned one or multiple *sites* by users, each a container for pricing information. You create the zone/site structure using the "Zones" tab of the CDB's CDBWin Settings feature; it is there that you define zones and assign sites to them.

Items are usually assigned to a zone because grouping those items together as a target makes sense from a pricing management perspective. They may share common characteristics—for example, stores grouped in a common geographic location, priced items that come from a specific distribution center, or items in a specific department that remains consistent in pricing activity across stores.

Sites can represent an even more specific target for prices—perhaps an individual bricks-and-mortar store or a single department within that store.

Zones can contain one or more sites. It is possible for one site to belong to more than one zone. The global zone impacts all sites but not zones. All zones and sites—even the global zone—can be said to reside in a larger "root" container, but that is a structural construct. You won't be doing any pricing work in it.

Zones and Sites



The fundamental role the zone concept plays in CPB's ability to manage pricing information on behalf of the CDB is indicated by the following:

- When you set up CPB to import vendor files you must select a zone to which the imported price data will apply (see "Vendor Import" on page 6-5).
- When you add or update an item in CPB using **Add Item** (see see "Add Item" on page 4-26) the current zone is identified by CPB determining where the changes will be applied when accepted.
- When you enter a new price or item through the CDB, it will be associated with the site in which you are working.

For the most part[1], when you accept pricing changes in CPB, you choose what CDB zones those changes affect and direct them there. Pricing information can then be sent to a compatible POS system via the appropriate poller

Important **A pricing manager often manages many sites through CPB. To avoid confusion, SSCS recommends uniformity in your naming conventions across sites for such criteria as Department and Item Description. This will make targeting and filtering items more efficient.**

Important **SSCS recommends that two or more individuals working on pricing information for the same zone *not* accept and deploy changes at the**

1. Certain CPB functions allow you to make changes on a site-specific basis, and these are covered in later chapters. However, to use CPB most effectively, it is best to create zones that closely align with your pricing strategy so that it makes sense and is practical to deploy and manage pricing updates on a zone-by-zone basis.

same **time. Unexpected results can occur because the system takes the last change entered and there is no alert notifying a user that someone else is working simultaneously with them in the zone, making changes.**

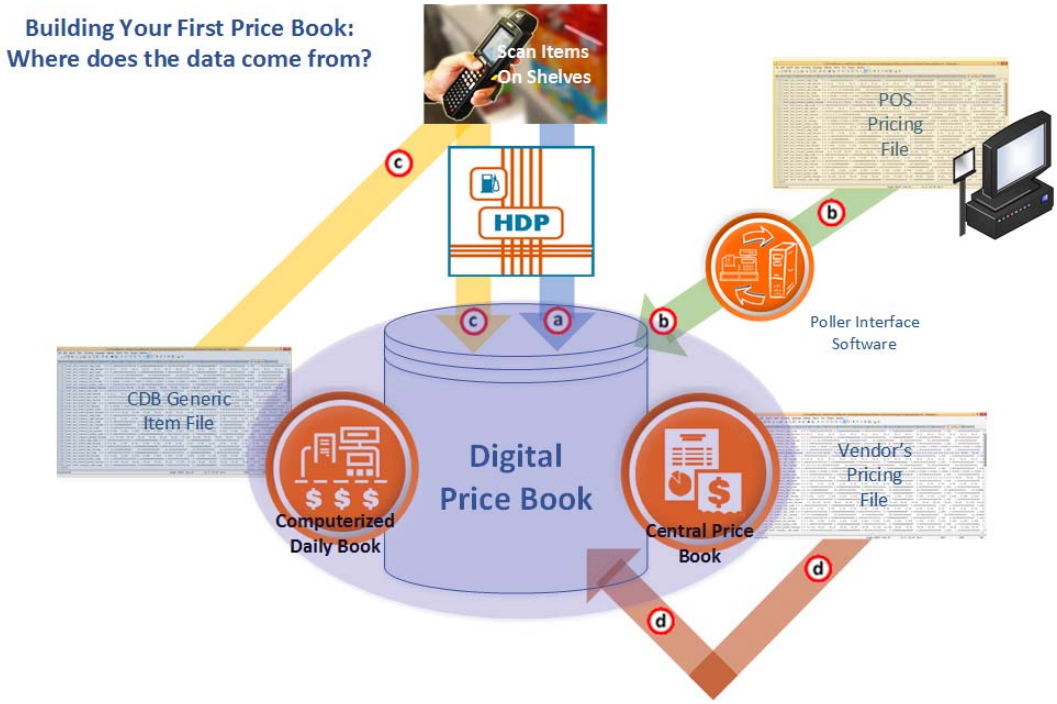
Minimum System Requirements

Minimum system requirements for CPB are the same as those for the CDB, a list of which is available in the *CDBWin User's Guide* in the book's "Introduction." Central Price Book has been tested for use with the Chrome, Firefox, and Edge web browsers.

Building Your First Price Book

If you have never created a price book for your enterprise, where do you start? Turns out there are several ways to build a foundation upon which your price book will be built:

Where initial pricing data comes from



As shown above, you can build a price book by:

- (a) Starting with an empty price book, scanning the store with a Hand-Held Terminal, and using the HDP Application to post the items to the CDB.
- (b) Using the price data in a POS system that produces a pricing file the CDB can read, importing it into your poller interface software, and posting it to the CDB.
- (c) Using a "generic" item file that may be included with the CDB when you purchase the system. To get this file to reflect precisely what is on the shelves, a complete shelf scan of the store using the HHT should be initiated, followed by posting the items to the CDB using the HDP Application. When this process is complete, the price book can be edited as needed.
- (d) Importing vendor files through Central Price Book and performing the Distribute to Sites function (see "Distribute to Sites" on page 6-8).

Note Some corporate clients may use item files specific to their enterprises that come “shipped” with their versions of the CDB.

Required Setup in the Computerized Daily Book

Before you begin using Central Price Book productively, you must first complete required setup in the CDB.

Zones

CPB requires that you set up in the CDB the zones and respected sites over which Central Price Book is to exert pricing control. You do this through the CDB's "Zones" tab.

Multiple zones can be created. A mixture of established sites can be included in a zone. The same site can be included in different zones. A global zone impacts all zones and sites. Move through existing zones using the navigation buttons at the bottom left of the window.

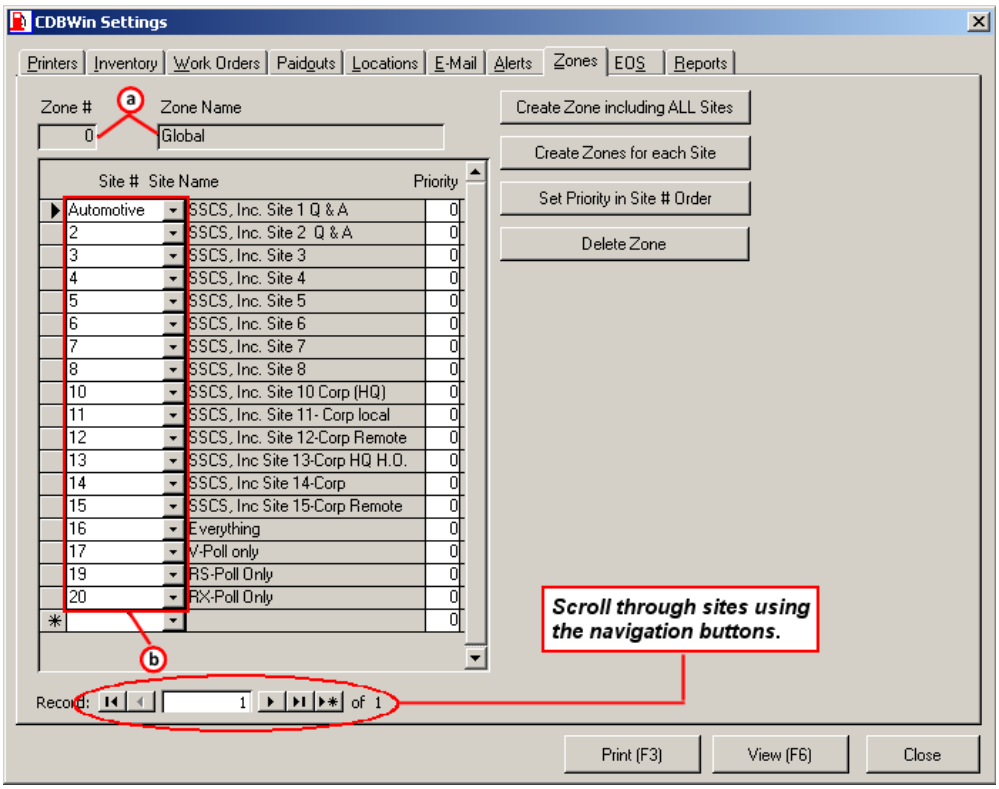
Changes you make here take effect immediately in the CDB and in CPB after a site import has been initiated as described in "Site Import" on page 6-6.

Note **For background about the zone/price structure in Central Price book, read "Pricing Structure, Design and Behavior" on page 1-1.**

To set up zones and the sites within them:

1. Log onto Sunray.
2. On the Sunray **Start** menu, click **CDBWin**.
3. Type your CDB username and password.
4. Select a site by double-clicking it.
5. On the CDB **Setup** menu, click **CDBWin Settings** > the "Zones" tab.

Zones Maintenance Tab in the CDB



6. Several options become available at this time:
   - You may enter a unique zone number and name in the Zone # and Name text boxes at the top of the window (a), then use the combo boxes (b) to select those sites you wish to include as part of the displayed zone.
   - Click **Create Zone including ALL Sites** to create a global zone #0 (a zone that includes all existing sites). If a global zone #0 already exists, you will be asked if you want to override it, although the Zone #0 and designation "Global" will not change. Overriding a global site might be done, for example, when you have added sites in the CDB subsequent to the creation of a previous Zone #0, and want to include the newly created sites in the Global Zone.'
   - Click **Create Zones for each Site** to create one zone for each site that exists in CDB. Scroll between sites using the navigation buttons. Zone numbers above 9900 are reserved for site-specific zones created by using this feature. Once created, zones greater than 9900 cannot be edited in the Zone # box.
   - With the record of an existing zone displayed, you can use the list boxes to add or change sites within that zone. The order of sites in a zone—which you define—is significant, in that CPB will look to the topmost site first to find items from which to build a zone master (see "CDB Zones and Sites" on page 1-8) and then look in subsequent sites one by one in descending order of the list. For example, if:

     Item #012345678910 has a list price of $2.25 in Site 1 and...

     Item #012345678910 has a list price of $2.50 in Site 2 and...

     Site 1 has a higher priority than Site 2, when a zone master is built, the second instance of the item will be ignored. In other words, the master will include the item at a list price of $2.25.

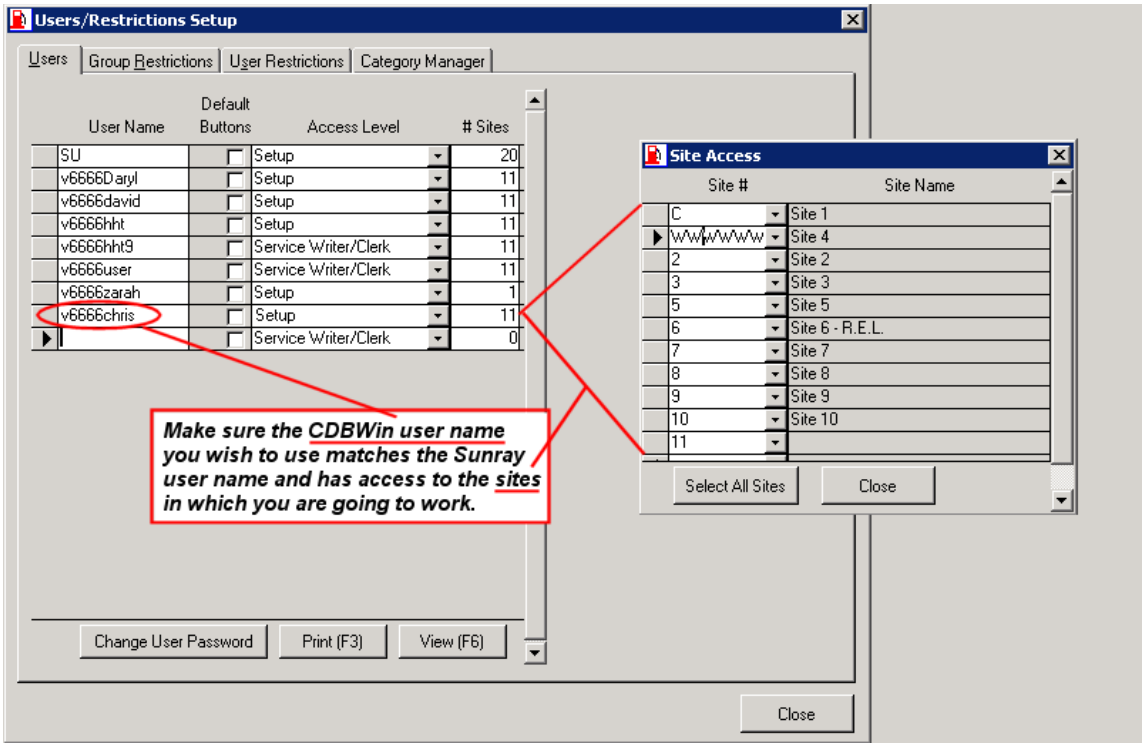
     This is known as *priority order* (see next bullet).
   - Though you have the ability to manually arrange the priority of sites within a zone, with the zone displayed you can click **Set Priority in Site # Order** to re-set the displayed sites in numeric order. Priority order (see previous bullet) is like-wise rearranged.
   - Click **Delete Zone** to delete the displayed zone from the CDB and CPB.
7. Click **Close** when you are finished.

Setting Up CDB User Restrictions

Before using Central Price Book for the first time, you must confirm you have a username set up in the Computerized Daily Book (CDB) that matches your Sunray logon username (***v####user*** where #### is your serial number and *user* is the name of the user for this serial number). This username must have access to the sites for which you will be processing inventory pricing changes. To do this:

1. Log onto Sunray.
2. On the Sunray **Start** menu, click **CDBWin**.
3. Type your CDB username and password.
4. Select a site by double-clicking it.
5. In the CDB, on the **Setup** menu, click **Users/Restrictions** to display the window:

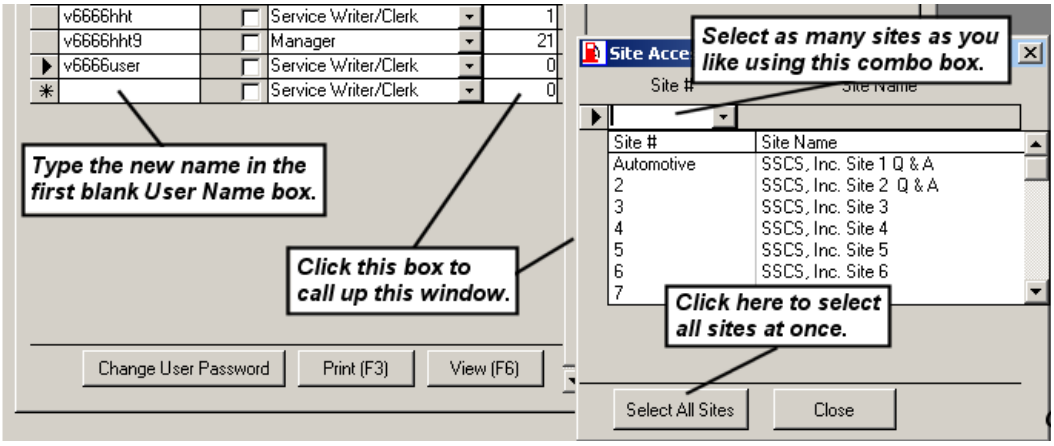
Users/Restrictions



6. *If the Sunray username you want to use for Central Price Book is already set up in the CDB* and has access to the sites in which you will be doing the work, you are ready to use the program. Proceed to "Accessing the SSCS Portal" on page 3-1.

   If the username is not set up in the CDB, add a CDB username in the Users/Restrictions window that matches the Sunray username. To do this:

7. Type the name in the first blank **User Name** box:



8. Click the # **Sites** box for the new User Name to display the Site Access window.

9. In the Site Access window, select the appropriate sites (you can select more than one) from the Site # combo box. Click **Select All Sites** to select all sites at once.

10. Click **Close** when finished.

Accessing the SSCS Portal

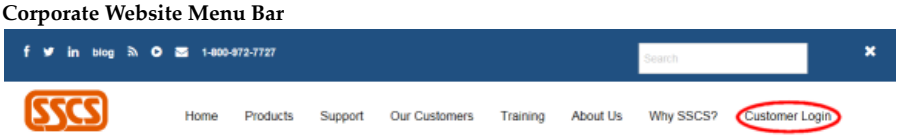
Important To ensure your SSCS Web-based application functions correctly, it is recommended that you enable pop-ups in your browser.

Logging Onto the SSCS Portal

To log on to the SSCS Portal:

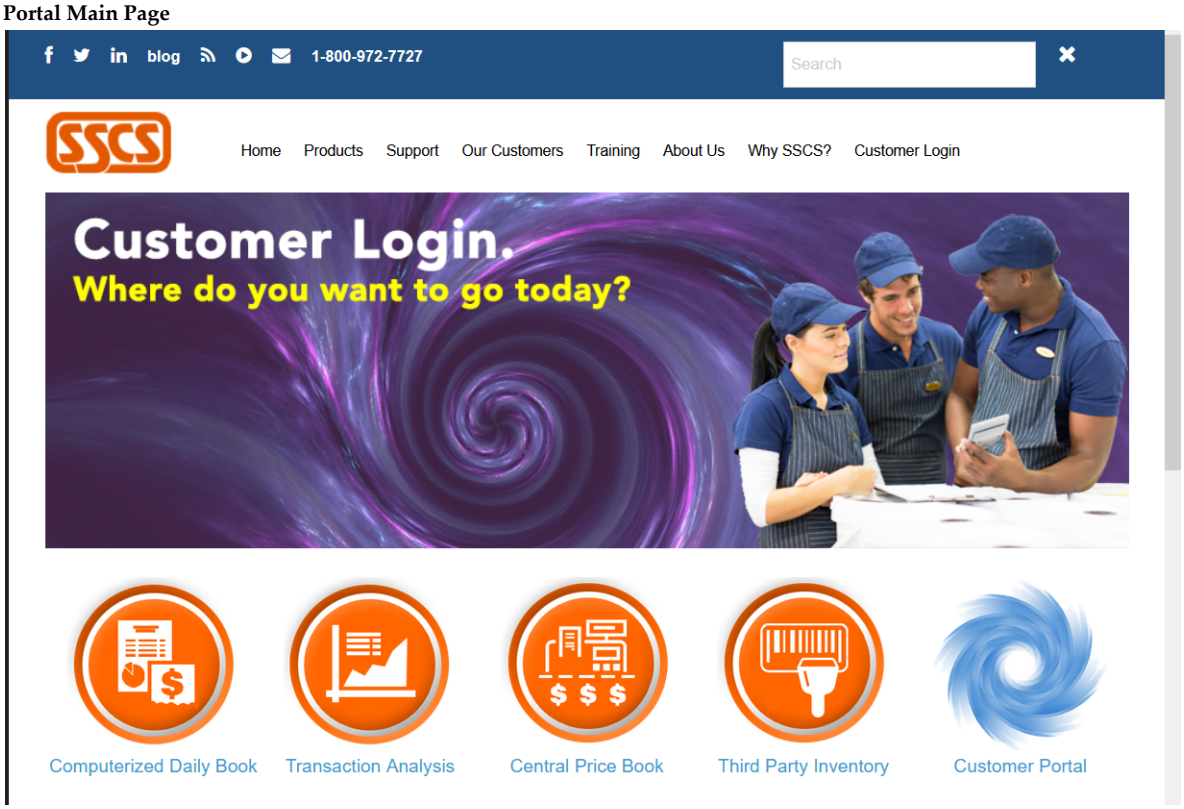
1. Access the SSCS Corporate Website (http://www.sscsinc.com) in your browser.

Corporate Website Menu Bar



2. Click **Customer Login** in the Web site menu bar. The SSCS Portal Main Page appears:

Portal Main Page

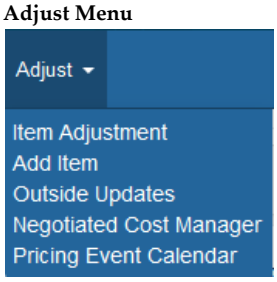


3. Click the icon of the program you want to launch.

   When you select **Central Price Book,** you are taken to the **SITE IMPORT** screen (see "Site Import" on page 6-6).

Adjust Menu

Adjust Menu



Item Adjustment

Central Price Book's Item Adjustment feature allows you to modify pricing information for items that have been accepted into CPB and distributed to the CDB's pricing zones. Using a variety of filtering (criteria) options, Item Adjustment allows you to make group changes to items. Once changes are made, the items affected can be distributed to the CDB pricing zones using the Distribute to Sites function (see "Distribute to Sites" on page 6-8).

Important **When an item exists in the digital price book with different prices in different sites, CPB uses the priority order you establish in the CDB to determine which price is being displayed (priority order is explained in the bullets under step 6 in "Zones" on page 2-1).**

Item adjustments are "internal" changes initiated from CPB and do not appear staged for acceptance in the Outside Updates window. No intermediate step is required. Simply push them "out" to the CDB zones with Distribute to Sites.

The Item Adjustment window allows you to:

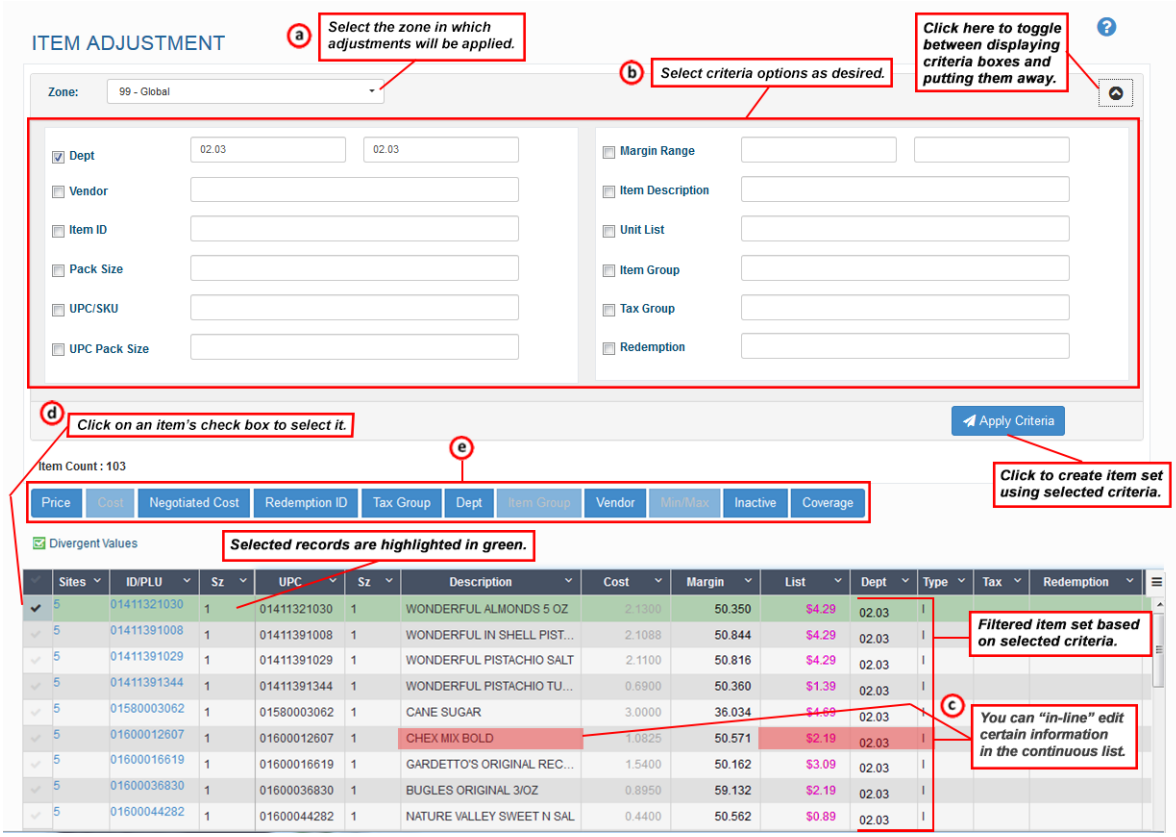
- Select criteria options on which to filter items with prices or other setup values in preparation of changing them at target sites throughout the CDB price book.
- Select the type of price change (percentage, add amount, set amount) and its value. You also can change other characteristics of selected items using the buttons that run across the bottom of the window.
- Set up Item Groups to use with any multi-item promotions you wish to use in the CDB. (See "Item Group" on page 4-17.)
- The Coverage feature tales what currently displays in the Item Adjustment screen and updates it to another site you select. (See "Coverage" on page 4-23).
- Set up the specifics of Future Pricing for items you have designated to be included in a Future Pricing Event.

Basic Item Adjustment Procedure

The following is meant to give a general idea of workflow in the Item Adjustment window. More detail can be found in the sections directly following.

1. On the **Adjust** menu of CPB, click **Item Adjustment**. A window like the following appears, although unlike the sample illustration, it will be clear of items:

Item Adjustment



2. Select a zone in which the adjustments are to be applied using the combo box provided (a).

3. Apply criteria options (b) to create an item set (as explained in the following section, "Criteria Options").

Tip **You can use the arrow tool in the top right hand corner of the gray box (see above illustration) to hide the criteria options, if desired.**

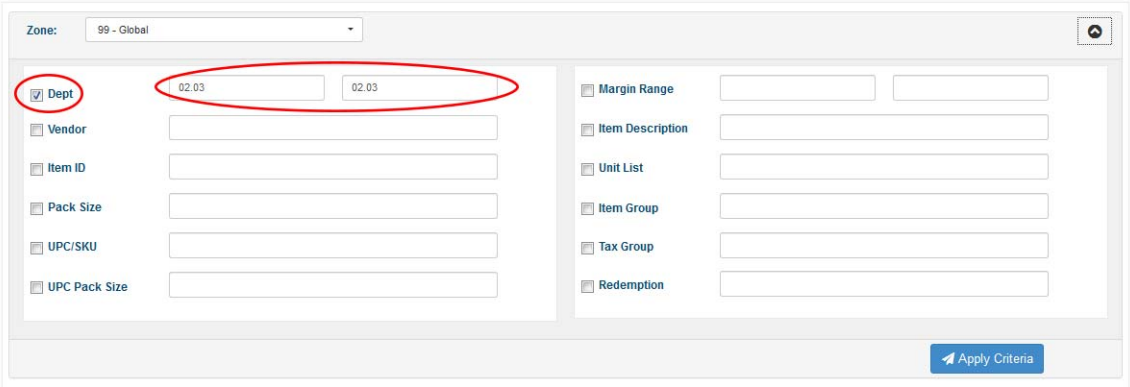
4. Edit individual values in the Item Adjustment continuous list (c), if desired. Information in the **Description**, **Receipt Description**, **Dept**, and **Unit List** columns can be modified by typing right into the box, an activity called "in-line editing". In-line editing is also available via combo box in the **Tax Group** and **Redemption** columns. In-line editing is autosaved when you move the cursor from Item Adjustment to another CPB box.

5. Select the items you wish to adjust within the filtered item set by clicking on the check box at the beginning of the record (d). Basic Windows conventions hold for selecting and deselecting single or multiple items, continuously or non-continuously. Selected item records display green.

6. Initiate one of several adjustment actions using the blue buttons (e) just above the continuous list (the effect of each is explained in "Adjustment Types" on page 4-8). This calls up another window into which you can record the specifics of the adjustment. Click **OK** when finished in an adjustment-specific window. Only after you Dis-

tribute to Sites (see “Distribute to Sites” on page 6-8) will the accepted changes in the adjustment-specific windows be “pushed out” to the CDB zones.

Criteria Options



To select a criterion to help narrow the item set you wish to adjust:

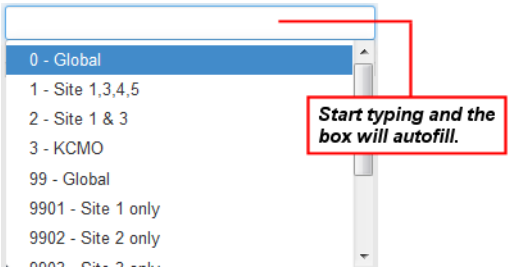
1. Select the check box corresponding to the criteria name.
2. Type the specifics that apply in the corresponding check box.

In the illustration above, **Dept** is selected and the department range **2.03** is typed as the beginning and end department range boxes, meaning only items in that department will be returned.

Certain criteria can be selected without requiring specifics. When filtering, multiple criteria can be used to narrow the sample further.

Let’s look at each criteria and what it means.

Zone — CPB pricing control is zone-based. Before you adjust items, select or type the zone in which you wish changes to be applied. Selections in the list reflect the zones currently set up in the CDB:



Once you select a zone, you can begin selecting criteria options. To make a criterion active, select the check box next to it.

Department Range — Type the range of the inventory or expense departments to be affected, either within a department (for example, **2.30–2.69**), or across departments (**2.00–99.99**). When the beginning Department Range box is left blank, Central Price Book includes every value up *to* and including the value displayed in the ending box. When the ending Department Range box is left blank, Central Price Book includes every value *from* the value displayed in the beginning box. For example, the range ***<blank>*–8.88** would include everything up to and including Department **8.88**; the range **9.01—*<blank>*** would include all Departments starting with **9.01** and including all departments/subdepartments thereafter. A null in the beginning *and* ending range boxes includes everything.

Important **To avoid undue confusion when managing pricing information, SSCS recommends department numbering and naming conventions be consistent across all the CDB sites.**

Vendor — If desired, you may select a vendor on which to filter, a convenience that allows you to adjust prices in accordance with the policies of individual suppliers without affecting items from other sources. Set your vendors up in the CDB.

Item ID — Type the Item ID (PLU). Type the leading digits of a PLU to specify items which start with those numbers. Use a forward slash (/) when typing a U.P.C.-E format ID and press **Enter** afterward to expand the ID to U.P.C.-E format (for example, /0289632 = 02820000963).

Pack Size — Type a pack size, if desired. This is how many items are in a multipack, for example, the number of packs in a cigarette carton (10).

UPC/SKU — Type the leading digits of a U.P.C. when specifying items that start with those numbers. You may type the first portion of a number to look for items that include that portion, which is often used as a company prefix. U.P.C. company prefixes vary between six and ten digits in length. Additionally, the company prefixes encoded in EAN-13 and EAN-8 symbols vary in length. For example, select the **UPC/SKU** check box and type **076998** in the text box next to the UPC / SKU label. All Foster Farms products meet the criteria and will display since they all start with 076998. Use a forward slash (/) to expand U.P.C.-E format to U.P.C.-A (for example, /0289632 = 02820000963).

UPC Pack Size — Type the U.P.C. pack size of the multipack. In the case of a cigarette carton with a different U.P.C. than the single items contained within it, the number would be **1**, because even though there are multiple items within the multipack, there is only one carton associated with the item. In the case of a ringlet six-pack, where there is no difference between the U.P.C. of the individual item and the U.P.C. of the multi-pack, it would be **6**.

Margin Range — Select a margin range by typing in a beginning and ending margin. This entry will filter down to all items included in the range and is especially helpful when combined with other filtering criteria, for example, a specific product set. When the beginning Margin Range box is left blank, Central Price Book includes every value up *to* the value displayed in the ending box. When the ending Margin Range box is left blank, Central Price Book includes every value *from* the value displayed in the beginning box.

Item Description — Type a "string" of characters that can be found within the description of the items you are specifying. The system will find the string anywhere in the item's description and display the results. This criterion is not case-sensitive.

Unit List — Type a list price using decimal format (limit: 2 decimal places — ***xx.xx***) to display an item sample set with that list price. This criteria often will be used with other criteria, for example, specific product types as defined by UPC/SKU.

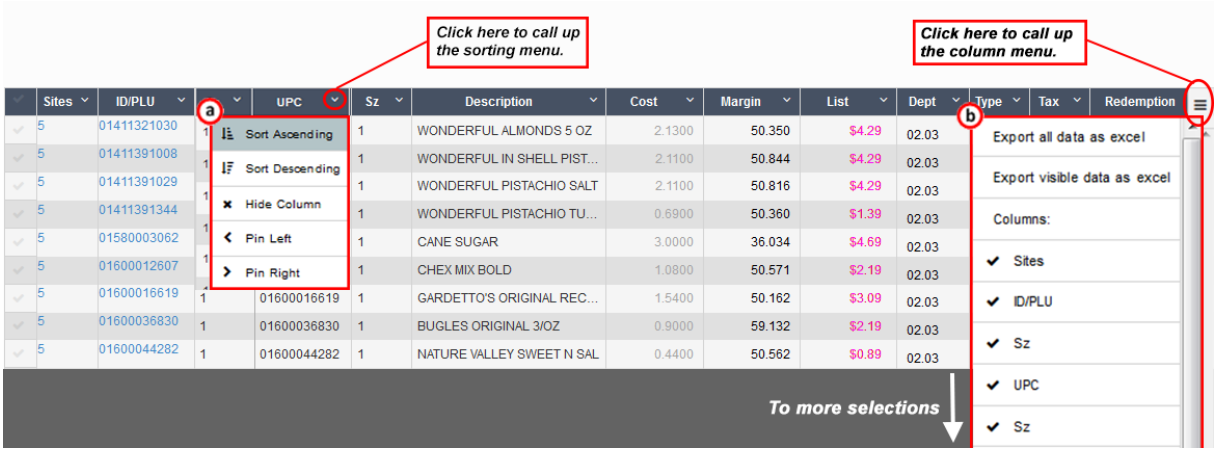
Item Group — If you use Item Groups, you can filter your items by a specific Item Group, which may be useful for speedy re-pricing of multi-item promotions. Information on Item Groups is available in the *CDBWin User's Guide*, in Chapter 1 under the section titled, "Item Groups".

Tax Group — If you have assigned tax groups to your items, you can select and use specific Tax Group IDs, as set up in the CDB, to filter an items.

Redemption — From the combo box, select the Redemption ID of the items you want to specify as criteria. Redemptions are set up in the CDB. Information on Redemptions is available in the *CDBWin User's Guide*, in Chapter 1 under the section titled, "Redemptions".

Column Headings

Tip You can control how many columns display in the main part of the screen by using the Columns Menu. See “Columns Menu” on page 4-7 for a complete explanation.



Each displayed item record in the Item Adjustment screen contains components of pricing information, reflecting the current state of the price book. Each component displays in its own column.

There are two menus available from this part of the screen. The first is the Sort menu which you You can sort columns as described in “Sorting Menu” on page 4-6.

Important Remember that if an item exists in two or more sites with different properties, Item Adjustment looks to the priority site hierarchy as set up in the CDB to determine the price it displays here. Read about priority order in “Zones” on page 2-1 (it’s listed in a bullet under step 6).

Sites — A display-only box showing the number of sites in which the item resides and which will be impacted by any changes you make to the item. Click the site number to bring up the Site/Zone Coverage window for the item (see “Coverage” on page 4-23 for an explanation of the Coverage window).

ID/PLU — The inventory ID/PLU of the item. Click the hyperlinked value to call up the Add Item window which will allow you to edit the information contained in the record.

Sz — The pack size of the item.

UPC — The U.P.C. of the item.

Sorting Menu (a) — See “Sorting Menu” on page 4-6.

Sz — The pack size of the U.P.C.

Description — The current description of the item. *This box accepts typed in-line editing.*

Dept —The department in which the item resides. *This box accepts typed in-line editing* and, if you right-click the department number when the cursor is in this box, a list of departments and subdepartments from which you can select displays, an easy way to change the item record’s department as shown in “Department” on page 4-16.

Cost/Margin/List — Cost, Margin, and List values display here.

- You can edit the Margin and List values by double-clicking their boxes and re-typing (unless the Cost is 0.00 in which case the Margin box is "locked" to disallow entry).
- The Cost value is display-only unless you enable editing by selecting the **Enable Unit Cost in Item Adjust/Add Item** check box in the Preferences window as shown in "Preferences" on page 6-1. (This type of Unit Cost change does not affect the CDB's average cost value on the item after a Distribute to Sites event.) This is the unit cost from the priority site as set in the CDB.
- If the List Price is pink, it means there are divergent values for the item throughout the CDB. You can see them by right-clicking and learn about how to work with them in "Divergent Values" on page 4-8.

Type — Displays whether item is an inventory item (**I**), an expense item (**X**) or a sale-only item (**S**).

Tax — *Even though this means Tax Group it reads only "Tax" to save room on the grid.* The tax group as recorded through the CDB that is associated with the item (not required). This is a combo box that can be used for in-line editing. It contains entries for all zones in the price book.

Redemption — The Redemption ID as recorded through the CDB that is attached to the item (not required). This is a combo box that can be used for in-line editing. It contains entries for all zones in the price book.

Rcpt Desc — A short, secondary description that can be output by certain POS systems. *This box accepts typed in-line editing.*

isUniform — Yes means the information for the item is the same across all zones and sites. No means that the item has a divergent value.

Columns Menu (b) — See "Columns Menu" on page 4-7.

Sorting Menu

Note **The Sort Menu is available from the columns in both the Item Adjustment and Outside Updates windows.**

If you click the down arrow that appears at the top of any column you'll call up a short menu of sorting options. In each case, the sort only "holds" for the current session, meaning that when you leave the screen and return to it, the columns will revert to the previous sort.

Sort Ascending —Sorts from lowest value at the top to the highest, whether numeric or alphabetical (A to Z).

Sort Descending —Sorts from highest value at the top to the lowest, whether numeric or alphabetical (Z to A).

Hide Column — Hides the selected column in current view.

Pin Left — Takes the selected column and moves it to the far left of the grid.

Pin Right — Takes the selected column and moves it to the far right of the grid.

Columns Menu

Note **The Columns Menu, in slightly different versions, is available from the columns in both the Item Adjustment and Outside Updates menus.**

In the column titles row, to the far right of the screen's main items grid, you'll see a hamburger icon ( ). Click it to call up the Columns Menu.

Two versions of the Columns Menu are available in Central Price Book, one from the Item Adjustment screen nd one from the Outside Updates screen. They function the same, although the details vary, as illustrated at right.

Export all data as excel (a) —Use this selection to export to an Excel spreadsheet, all the data contained within the zones/sites and criteria that have been selected (whether you have selected it to display visibly or not).

Export visible data as excel (b) — Use this selection to export to an Excel spreadsheet, *only* the data contained within the zones/sites *that you have selected to display as visible* using (for example) the **Show Only New Items** command in the Outside Updates screen or the **Divergent Values only** check box in the Item Adjustment screen.

Columns (c) — The Item Adjustment and Outside Updates screens allow you to customize the information visible from the item grid by toggling on and off specific columns. When a column is currently displayed, it appears in the menu appended with the check

mark (✔) to the left of the column title. When a column is currently hidden, an "x" (✖) appears to the left of the column title.

Clear all filters (d) — *Outside Updates screen only*. If the gray filters at the top of the columns are displayed, and you have entered partial criteria in on or more to narrow the items in the screen, click this menu item to clear all of them at once.

Adjustment Types

Common Command Buttons

When you select an item or items in the Item Adjustment list, the buttons at the top of the Item Adjustment grid become active (they turn a darker blue), allowing you to take specific actions on all "active" rows highlighted in green.

Any adjustment you initiate takes place in a new window specific to the adjustment where you record information. Once information is recorded, you can take one of three actions common to all adjustment types, initiated by the buttons at the bottom of the window that you've called up:

Preview — Calls up a display of the proposed adjustment before you accept it. In many cases an existing value is compared to the proposed adjustment. This display is suitable for printing, and provides access to CPB's report tools (see "Negotiated Cost" on page 5-1).

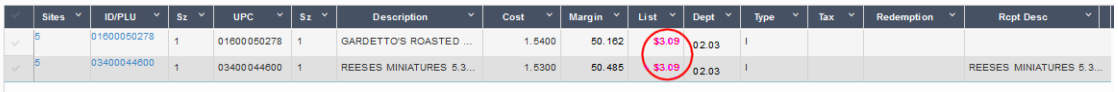
OK — Commits the adjustment to being staged in CPB where it is now ready to be distributed to sites.

Cancel — Closes the window and cancels the pending adjustment.

Divergent Values

Divergent Values, rendered in pink, are values for the same item that differ across sites. They apply to any piece of information within a row, appearing in pink type in the Item Adjustment grid:

Divergent Values in Item Adjustment Grid



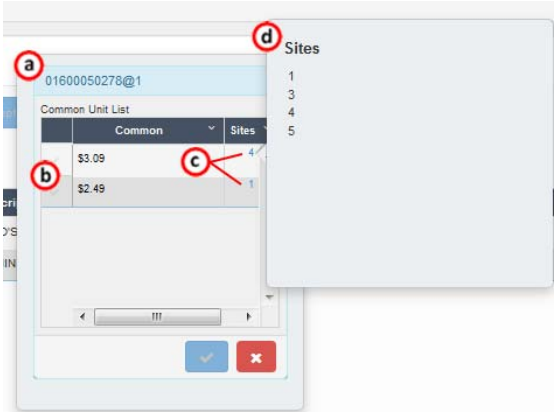
Sites	ID/PLU	Sz	UPC	Sz	Description	Cost	Margin	List	Dept	Type	Tax	Redemption	Rcpt Desc
5	01600050278	1	01600050278	1	GARDETTO'S ROASTED ...	1.5400	50.162	$3.09	02.03	I			
5	03400044600	1	03400044600	1	REESES MINIATURES 5.3...	1.5300	50.485	$3.09	02.03	I			REESES MINIATURES 5.3...

It may be fine if these values are different based on they way you have set up your price book, but if that is not the case, CPB gives you the opportunity to review the divergent values and select the one that you want applied to the price book across all sites.

This report also flags, in the **Dept** column, invalid item types based on account, such as **I** or **S** items with expense account numbers like **3001**.

To do this, locate the value you wish to investigate and right click on it. A window like the following will appear:

Divergent Values



At the top of the window, highlighted in blue, displays the item's Inventory ID (a).

Directly below it, in the grid, you'll see a list of the different values existing throughout the price book (b). In our case, there are two different list prices: **$3.09** and **$2.49**.

Across from the prices, in the Sites column, displays the number of sites in which the price is current (c). In our example, the list **$3.09** appears in **4** sites, while the list **$2.49** appears in **1**. To find out in which sites the list price resides in, click the value's hyperlink. The site numbers display (d).

This window gives you the opportunity to select one of the displayed values to make uniform across all sites. To do this:

1. Click the item whose value you wish to retain for all sites. The record becomes highlighted in green.
2. To accept the change and put the window away, click the blue check mark ( ) at the bottom.

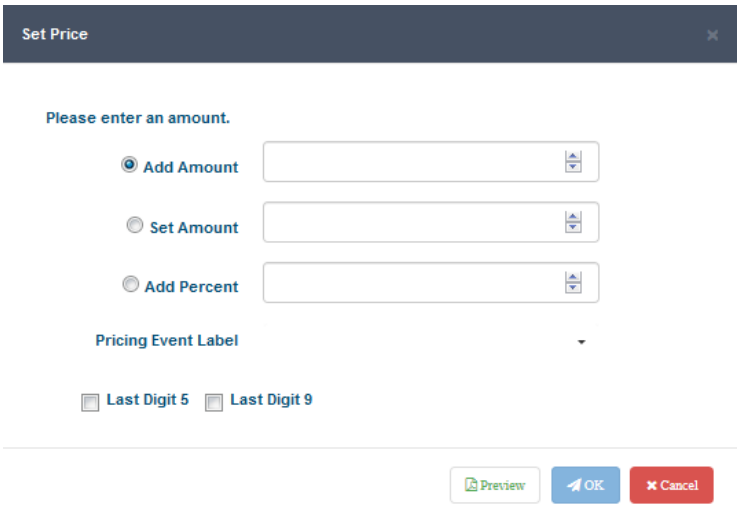
If desired, you may toggle the Item Adjustment grid to display only Divergent Values by selecting the check box to the left and below the Adjustment Type buttons:

Divergent Values Check Box

Price

Click this button to set a list price change to be applied to the selected rows. The following window appears:

Set Price



Work through the Set Price window as follows:

Add Amount — If you wish to add or reduce the unit list price of the selected items by a money value, select the option button next to this selection and type the desired amount in two-place decimal format in the box provided. For example, **0.10** would add ten cents to the unit list price of the selected items and **-0.10** would subtract ten cents.

Set Amount — If you wish to set a specific dollar amount as the list price for the selected items, that is, overwrite the current amount, select this option button. You must type the money value figure in the box. You can set this value to a negative amount.

Add Percentage —If you wish to adjust the list price by a percentage, select this option button and type the adjustment percentage in the provided box. For example, if you type in **50**, a $1.50 item will have a new price of $2.25 [1.50 + (1.50 x .50) = 2.25]. Do not use the percent sign (%). You can enter a negative amount (for example, **-10**), if desired.

Last Digit 5 ? — Select this check box to round the last digit for new list prices to a 5. If this box alone is selected, CPB always rounds up to the next 5 ($4.90 becomes **$4.95**, $4.96 becomes **$5.05**, etc.).

Last Digit 9 ? — Select this check box to round the last digit for new list prices to a 9. If this box alone is selected, CPB always rounds up to the next 9 ($4.91 becomes **$4.99**, $5.44 becomes **$5.49**, etc.)—*with one exception:* the system will round *down* to 9 if the last digit is a 0 (zero), for example, $5.10 to **$5.09**.

Last Digit 5 ?/Last Digit 9 ? — If both check boxes are selected, CPB will round up to 5 or 9, depending on the next value upward (1–4 would be rounded to **5**; 6–8 would be rounded to **9;** the system will round *down* to 9 if the last digit is 0).

Pricing Event Label — If you wish to create a future pricing event for the items you have selected for price adjustment, you must first name it with a Pricing Event Label which allows it to be easily identified throughout CPB, specifically as a displayed event in the Pricing Event Calendar (see "Pricing Event Calendar" on page 4-56).

Adding a New Pricing Event
To add a new Pricing Event:

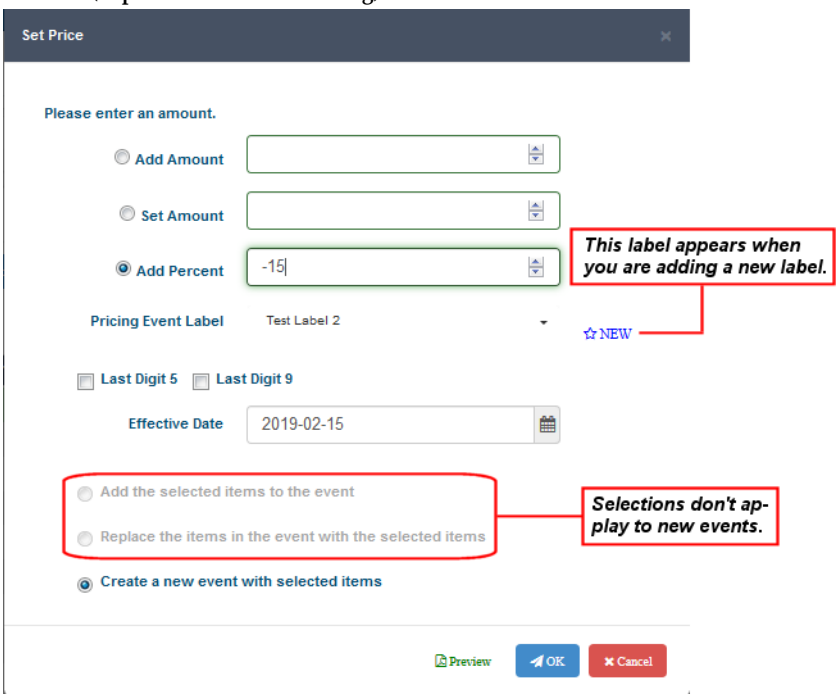
a. Select the items for adjustment.

b. Click **Price**.

c. Decide the money value change you wish to apply to the adjusted item set, including Last Digit 5/Last Digit 9.

d. In the **Pricing Event Label** combo box, type the label you wish to associate with the Future Pricing event. The window expands as shown below:

Set Price (Expanded for Future Pricing)



e. In the **Effective Date** box, record the date the Pricing Event goes into effect by typing the date in *yyyy-mm-dd* format or by using the calendar display button (see "Calendar Display" on page A2-2). You cannot schedule today's date; you must schedule at least one day forward in the future.

f. Click **Preview** to review your price changes or click **OK** to accept them.

g. Review the event as desired on the Pricing Event calendar, where you can edit the timing of events that have not yet occurred (see "Pricing Event Calendar" on page 4-56).

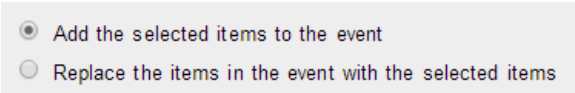
h. When you are sure that the event is set as you desire, *wait until the effective date* and then run Distribute to Sites. The Pricing Event will now initiate. You can also set up a scheduled task in the CDB for it.

Updating an Existing Pricing Event

You can use the Set Price window to update the items included in an existing Pricing Event. To do so:

a. Perform steps a – c in the previous section, although if you are just adding items to an existing Pricing Event there may be no need to change the price.

b. In the Pricing Event Label combo box, select the Pricing Event you wish to edit. The following option buttons become enabled:



Add the selected items to the event — Will add the items currently selected in the Item Adjustment window to the Pricing Event.

Replace the items in the event with the selected items — Will override the items currently in the Pricing Event with the items selected in the Item Adjustment window.

c. Complete the process by following steps f – h in the previous section.

Preview — The Price preview shows the existing list vs. the list that will be applied to the items after the adjustment is complete:

Price Change Report

SSCS, Inc 0 - Global
Demo not for Shipping
SALINAS, CA 93901-5013

Service Station Computer Systems, Inc.
Computerize Daily Book
Copyright © 1984-2018

Date: Feb 08, 2019
Name: v6665davidr
Time: 9:58 AM

Price Change Report

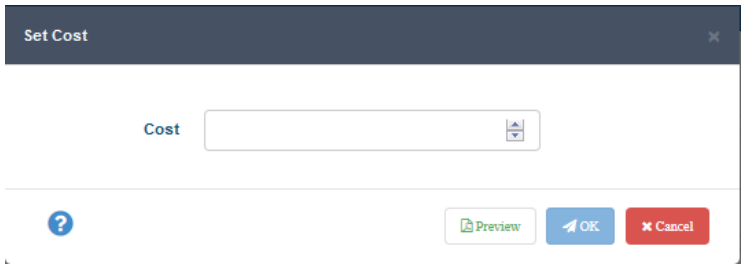
ID	Pack Size	UPC	Upc PackSz	Description	Dept	Eff. Date	List	New List
01121000001	1	01121000001	1	TABASCO PAPER SOURCE	02.03	2019-02-13	3.09	2.63
01600016619	1	01600016619	1	GARDETTO'S ORIGINAL RECIPE	02.03	2019-02-13	3.09	2.63
01600016669	1	01600016669	1	GARDETTO'S ORIGINAL RECIPE	02.03	2019-02-13	3.09	2.63
01600016699	1	01600016699	1	GARDETTOS LARGE ITALIAN R	02.03	2019-02-13	3.09	2.63
01600016749	1	01600016749	1	GARDETTO'S CHEESE BLEND	02.03	2019-02-13	3.09	2.63
01600050278	1	01600050278	1	GARDETTO'S ROASTED GARLIC RYE CHIPS	02.03	2019-02-13	3.09	2.63
01600050538	1	01600050538	1	CHIPTOLE CHEDDAR	02.03	2019-02-13	3.09	2.63
01600050731	1	01600050731	1	GARDETTO'S DELI MUSTARD	02.03	2019-02-13	3.09	2.63
03400044600	1	03400044600	1	REESES MINIATURES 5.3OZ	02.03	2019-02-13	3.09	2.63
03800016349	1	03800016349	1	PRINGLES LOUD SALSA FIEST	02.03	2019-02-13	3.09	2.63
03800016351	1	03800016351	1	PRINGLES LOUD CHEESY ITAL	02.03	2019-02-13	3.09	2.63
03800016420	1	03800016420	1	PRINGLES LOUD CHILI LIME	02.03	2019-02-13	3.09	2.63
03800016422	1	03800016422	1	PRINGLES LOUD SPICY QUESO	02.03	2019-02-13	3.09	2.63
72049592979	1	72049592979	1	TGI FRIDAY CHEDDAR BACON	02.03	2019-02-13	3.09	2.63

Cost

You can set the cost for an item or a set of items in the Item Adjustment screen. You should note, however, that the costs you set here do not impact the item's average cost in the Computerized Daily Book.

When you select a set of items in the Item Adjustment screen and click **Cost**, the following window appears:

Set Cost



In the Cost box, type the new cost that you want to apply to the selected set of items and click **OK**. If you want to see a list of the prices that you are proposing, click **Preview**.

You can only enter Cost if the **Enable Unit Cost in Item Adjust/Add Item** check box in the Preferences window has been selected (this type of Unit Cost change does not affect the CDB's average cost value on the item after a Distribute to Sites event).

Negotiated Cost

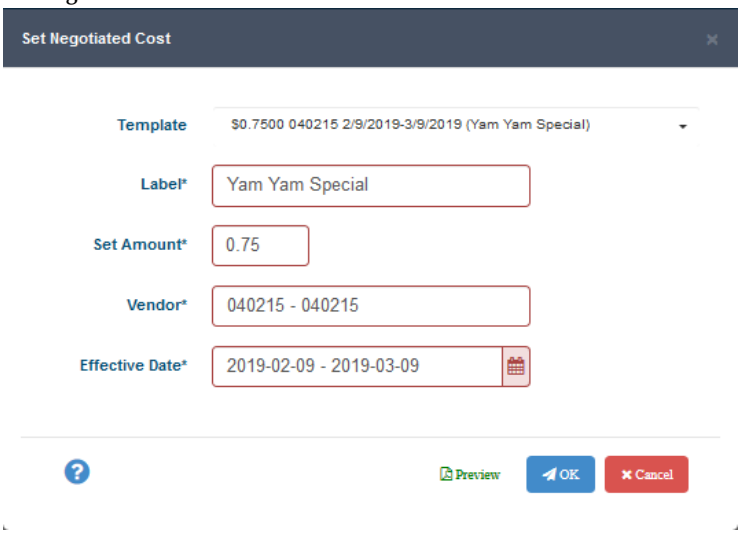
A negotiated cost is a cost for a set of items that you and your vendor have agreed upon, often for a finite period of time. When you create a negotiated cost item set, CPB retains it so that it can be called up again. This means, when you click this button, you can:

- Call up a window that allows you to create a new negotiated cost item set or;
- Recall a negotiated cost item set (template) for comparison against the cost values that appear on purchase transactions recorded in the CDB sites (costs not displayed in the Item Adjustment window).

Making negotiated cost entry here allows you to document exceptions to the negotiated cost through the Negotiated Cost report (see "Negotiated Cost" on page 5-1). The is valuable for the pricing manager in cases where he or she has to work with a vendor on cost issues.

When you select items in the Item Adjustment screen and click **Negotiated Cost**, the following window appears:

Set Negotiated Cost



Work through the Set Negotiated Cost window as follows:

Template —Use this combo box to call up an existing negotiated cost set (template) consisting of the information recorded through this window. You can then make changes to it. Each negotiated cost template is unique, defined by and marked by the system as *Label* | *Set Amount* | *Vendor* | *Effective Date* | *Expiration Date* (see above illustration). Once you select a negotiated cost template from this combo box, the information related to it populates the rest of the window.

If you are setting up a new negotiated cost template you do not have to make a selection from this combo box, but you do have to provide a label (see next).

Label — If you are creating a negotiated cost set for the first time, this text box gives you a chance to attach to it a label you define, making it easier to identify. This can be edited later. When a Label is attached to the set, it appears in parentheses at the end of the information identifying the template.

Set Amount — Record the negotiated cost value here. Use 2-place decimal format.

Vendor — Select the vendor for whom the cost is being negotiated using this combo box.

Effective Date — Record the beginning and end date the negotiated cost goes into effect by typing the dates in *yyyy/dd/mm* format separated by a hyphen or by using the calendar display button (see "Calendar Display" on page A2-2).

Preview — The Set Negotiated Cost preview shows the new negotiated cost and the information related to the items it affects:

Negotiated Cost Preview Report

SSCS, Inc 0 - Global
Demo not for Shipping
SALINAS, CA 93901-5013

Service Station Computer Systems, Inc.
Central Price Book
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Date: Feb 08, 2019
Name: v6665davidr
Time: 4:28 PM

Negotiated Cost Change Report

ID	Pack Size	UPC	Upc PackSz	Description	Dept	Eff. Date	Exp. Date	Vendors	New Neg. Cost
01600016619	1	01600016619	1	GARDETTO'S ORIGINAL RECIPE	02.03	2019-02-09	2019-03-09		2.75
01600016669	1	01600016669	1	GARDETTO'S ORIGINAL RECIPE	02.03	2019-02-09	2019-03-09		2.75
01600016699	1	01600016699	1	GARDETTOS LARGE ITALIAN R	02.03	2019-02-09	2019-03-09		2.75
01600016749	1	01600016749	1	GARDETTO'S CHEESE BLEND	02.03	2019-02-09	2019-03-09		2.75
01600019370	1	01600019370	1	GARDETTOS ORIGINAL 8.6 OZ	02.03	2019-02-09	2019-03-09		2.75
01600050278	1	01600050278	1	GARDETTO'S ROASTED GARLIC RYE CHIPS	02.03	2019-02-09	2019-03-09		2.75
01600050731	1	01600050731	1	GARDETTO'S DELI MUSTARD	02.03	2019-02-09	2019-03-09		2.75

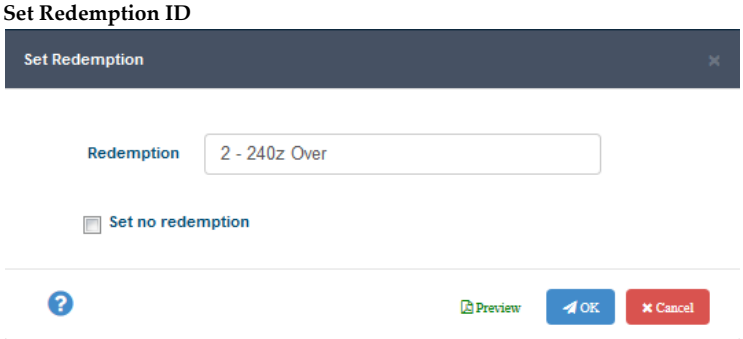
Tip **Print controls you can use with this report are described in "Print Controls" on page A2-1.**

Redemption ID

Click this button to apply a Redemption ID as set up in the CDB to the displayed item set (read about redemptions in the "Redemption" section in Chapter 1 of the *CDBWin User's Guide*).

When you create an Item Adjustment item set and click the **Redemption ID** button, the following window appears:

Set Redemption ID



Work through the Set Redemption ID window as follows:

Redemption —From the combo box, select the CDB Redemption ID you wish to apply to the selected items.

Set no redemption — If you wish to remove Redemption IDs from the selected items, select this check box.

Preview — The Set Redemption ID preview shows the existing Redemption ID vs. the Redemption ID that will be applied to the affected items after the adjustment is complete:

Redemption Change Report

SSCS, Inc 0 - Global
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SALINAS, CA 93901-5013

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Date: Feb 08, 2019
Name: v6665davidr
Time: 4:39 PM

Redemption Change Report

ID	Pack Size	UPC	Upc PackSz	Description	Dept	List	Redemption	New Redemption
00012000008412	1	00012000008412	1	DIET PEPSI 24OZ	03.00	1.79		2 - 240z Over
0001284102	1	0001284102	1	DIET PEPSI 24OZ	03.00	1.79		2 - 240z Over

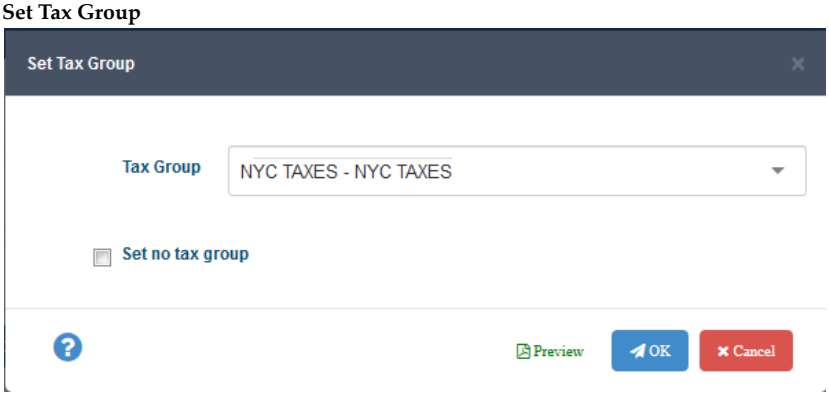
Tip **Print controls you can use with this report are described in "Print Controls" on page A2-1.**

Tax Group

Use this feature to apply a tax group as set up in the CDB to selected items in the displayed set (see "Tax Group" in Chapter 1 of the *CDBWin User's Guide* for more information).

When you select items in the Item Adjustment window and click the **Tax Group** button, the following window appears:

Set Tax Group



Work through the Set Tax Group window as follows:

Tax Group — From the combo box, select the Tax Group ID as set up in the CDB that you wish to apply to the selected items.

Set no tax group — If the selected items already have tax groups and you want them to be removed, select this check box.

Preview — The Set Tax Group preview shows the existing Tax Group vs. the Tax Group that will be applied to the items after the adjustment is complete:

Tax Group Change Report

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SALINAS, CA 93901-5013

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Date: Feb 11, 2019
Name: v6666chris
Time: 11:36 AM

Tax Group Change Report

ID	Pack Size	UPC	Upc PackSz	Description	Dept	List	Tax Group	New Tax Group
01600016619	1	01600016619	1	GARDETTO ORIG C/S	15.07	2.89	NOTAX	NYC TAXES
01600050278	1	01600050278	1	GARDETTO GARLIC RYE CHIPS	15.00	2.89	NOTAX	NYC TAXES
01600050538	1	01600050538	1	GARDETTO CHIPOTLE CHEDD	15.00	2.89	NOTAX	NYC TAXES
01600050731	1	01600050731	1	GARDETTOS LARGE MUSTARD P	15.07	2.89		NYC TAXES

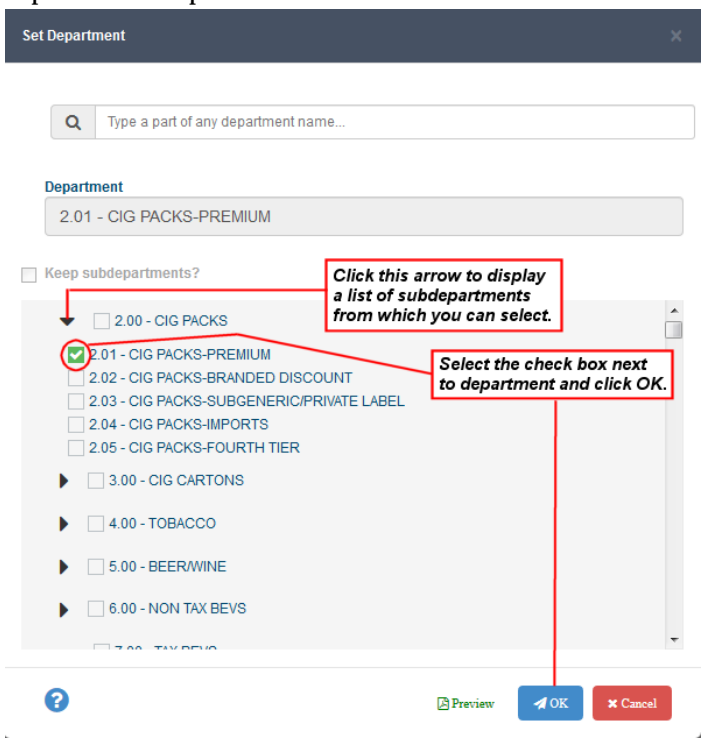
Tip **Print controls you can use with this report are described in “Print Controls” on page A2-1.**

Department

Use this feature to apply a different department to the items selected for adjustment. Departments are set up in the CDB (see “Department/Accounts” in Chapter 1 of the *CDB-Win User’s Guide* for more information). The change to the department will be recorded in the CDB after you Distribute to Sites.

When you select items and click the **Department** button, the following window appears:

Department/Subdepartment List



The main part of the window contains a scrollable list of departments and department numbers. The view of the subdepartments and subdepartment numbers assigned to each can be toggled on and off by clicking the arrow to the left of each department name.

To select departments or subdepartments, select the check box next to them and click **OK**. The items you selected in the Item Adjustment grid will change accordingly.

If you type a letter or number in the **Department** box, Central Price Book will assist you in looking up entries that contain your search string.

Tip **In the case of inventory items (Type I) or sale-only items (Type S), the only suggested departments will be those that the system allows to be applied to that specific item type. If you are attempting to change an expense item (Type X) account, the only suggested accounts will be those assigned to expenses.**

Tip **When changing Item types, keep in mind that you will have to enter a valid Expense Account if you are changing an I item to an X item. The new expense item will have the same list price as the inventory item from which it was changed.**

Keep subdepartments? — When changing a department on an item, you can select this check box to use the subdepartment value of the original department with the new department you select. For example, with the check box selected, if the department on the original item is 8.80, and you select **2.00** from the Department combo box, for speed and convenience the department applied to the item will be 2.80. Subdepartments cannot be applied to expense (Type X) items.

Preview — The Set Department preview shows the existing department vs. the department that will be applied to the items after the adjustment is complete:

Department Change Report

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Date: Feb 11, 2019
Name: v6666chris
Time: 12:52 PM

Department Change Report

ID	Pack Size	UPC	Upc PackSz	Description	Type	List	Eff. Date	Dept	New Dept
01600015990	1	01600015990	1	CHEX MIX TRADITIONAL	I	3.89	1980-01-01	15.09	15.07
01600016699	1	01600016699	1	SPECIAL ITALIAN RECIPE	I	2.89	1980-01-01	15.09	15.07
01600050704	1	01600050704	1	CHEX MIX COOKIES N CRM	I	2.79	1980-01-01	15.09	15.07
01600051235	1	01600051235	1	CHEX MIX BROWNIE SUPREME	I	2.79	1980-01-01	15.09	15.07
02840002317	1	02840002317	1	Munchies Ult Cheddar	I	3.29	1980-01-01	15.09	15.07
02900002111	1	02900002111	1	TRAIL MIX PEANUT BUTTER C	I	3.69	1980-01-01	15.09	15.07
02900007862	1	02900007862	1	PLT TRAIL MIX NUT/CHOC	I	3.59	1980-01-01	15.09	15.07
02900007880	1	02900007880	1	TRAIL MIX FRUIT N'NUT	I	3.59	1980-01-01	15.09	15.07
04141942001	1	04141942001	1	COMBOS 7 LAYER DIP TORTIL	I	2.79	1980-01-01	15.09	15.07

Tip **Print controls you can use with this report are described in "Print Controls" on page A2-1.**

Item Group

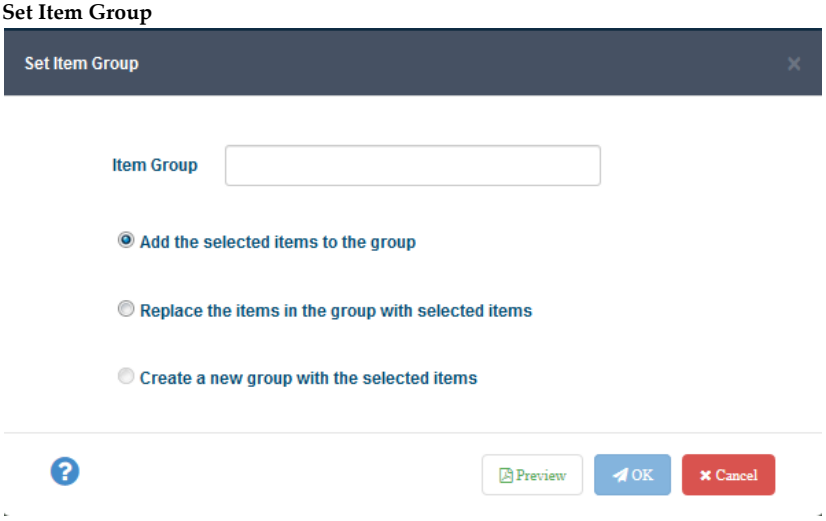
Use this feature to apply an Item Group to the selected items. Item Groups are set up in the CDB (see "Item Groups" in Chapter 1 of the *CDBWin User's Guide* for more information), but you can also create a new group in Central Price Book using this feature.

Important **If you have disabled the Item Group function using the Preferences window (see "Preferences" on page 6-1), the Item Group button becomes grayed out and applying an Item Group in the Item Adjust-**

ment window is disabled, along with adding or editing existing Item Groups from Central Price Book.

When you select items and click the **Item Group** button, the following window appears:

Set Item Group



Work through the Set Item Group window as follows:

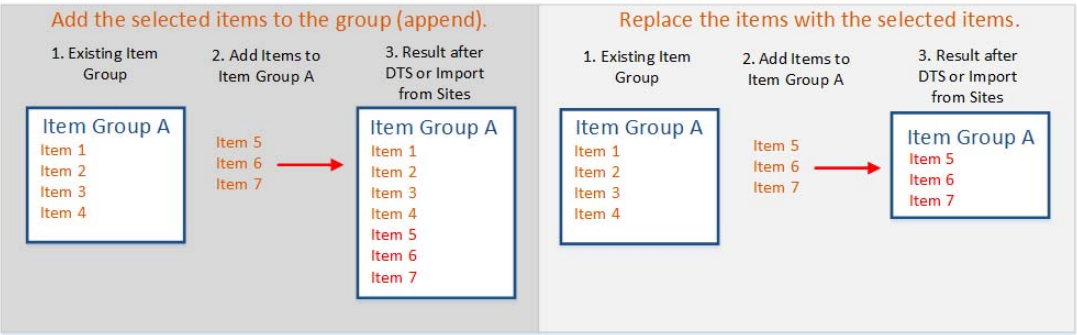
Item Group — This combo box allows you to select an Item Group description you have set up in the CDB allowing you to initiate one of the actions described in the following paragraphs. If you enter a search string of letters or numbers, the combo box will return suggestions.

You may also type a new Item Group description of up to 28 characters consisting of the selected items. This will activate and select the **Create a new group with the selected items** option button.

Add the selected items to the group — If you select this option button with an Item Group displayed, the items in the Item Adjustment grid will be added to the displayed Item Group. The appended Item Group merges the items with the existing Item Group in the CDB when you Distribute to Sites. *See following illustration.*

Replace the items in the group with the selected items —If you select this option button, the items selected in the Item Adjustment grid will replace those currently in the displayed Item Group. The updated Item Group will replace the existing item group in the CDB when you initiate Distribute to Sites. *See following illustration.*

Appending Vs. Replacing Items in Item Groups



Create a new group with the selected items —This option button is automatically selected when you type a description into the Item Group box not recognized by CPB.

When you click **OK**, a new Item Group will be created that contains the items in the Item Adjustment grid and is added to the CDB when you Distribute to Sites.

Preview — The Set Item Group preview shows one of the following:

- When the **Add the selected items to the group** option button is selected, only the items you are adding to the Item Group (annotated with their New Group ID) display, not the entire list with the items appended.
- When the **Replace the items in the group with the selected items** option box is selected, only the replacement items (annotated with their New Group ID) display.
- When the **Create a new group with the selected items** option button is selected, the selected items annotated with the New Group ID display as shown in the example below:

Item Group Change Report

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Date: Feb 11, 2019
Name: v6666chris
Time: 1:22 PM

Item Group Change Report

ID	Pack Size	UPC	Upc PackSz	Description	Dept	List	Group	New Group
01600015990	1	01600015990	1	CHEX MIX TRADITIONAL	15.09	3.89		MISCELLANEOUS SALTY SNACKS
01600016699	1	01600016699	1	SPECIAL ITALIAN RECIPE	15.09	2.89		MISCELLANEOUS SALTY SNACKS
01600050704	1	01600050704	1	CHEX MIX COOKIES N CRM	15.09	2.79		MISCELLANEOUS SALTY SNACKS
01600051235	1	01600051235	1	CHEX MIX BROWNIE SUPREME	15.09	2.79		MISCELLANEOUS SALTY SNACKS
02840002317	1	02840002317	1	Munchies Ult Cheddar	15.09	3.29		MISCELLANEOUS SALTY SNACKS
02900002111	1	02900002111	1	TRAIL MIX PEANUT BUTTER C	15.09	3.69		MISCELLANEOUS SALTY SNACKS
02900007862	1	02900007862	1	PLT TRAIL MIX NUT/CHOC	15.09	3.59		MISCELLANEOUS SALTY SNACKS
02900007880	1	02900007880	1	TRAIL MIX FRUIT N'NUT	15.09	3.59		MISCELLANEOUS SALTY SNACKS
04141942001	1	04141942001	1	COMBOS 7 LAYER DIP TORTIL	15.09	2.79		MISCELLANEOUS SALTY SNACKS

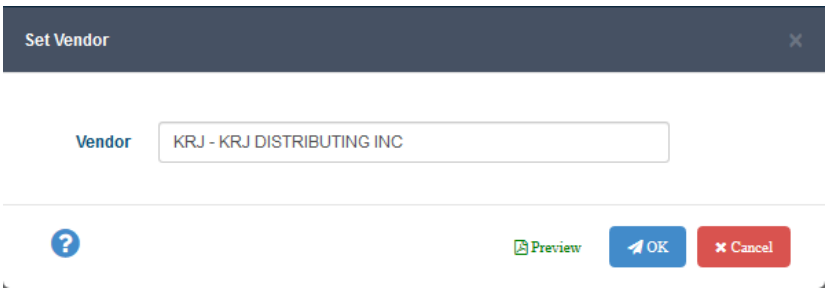
Tip **Print controls you can use with this report are described in “Print Controls” on page A2-1.**

Vendor

The Item Adjustment window allows you to associate a selected item set with an existing Vendor ID, a convenient alternative to associating Vendor IDs with items in the CDB.

When you select items in the Item Adjustment grid and click the **Vendor** button, the following window appears:

Set Vendor



You can select any existing Vendor ID from the combo box and click **OK** to apply it to the item set.

Preview — The Set Vendor preview shows the selected item set annotated with their New Vendor:

Vendor Update Report

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Demo not for Shipping
SALINAS, CA 93901-5013

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Date: Feb 11, 2019
Name: v6666chris
Time: 3:05 PM

Vendors Change Report

ID	Pack Size	UPC	Upc PackSz	Description	Dept	List	Vendors	New Vendors
01600015990	1	01600015990	1	CHEX MIX TRADITIONAL	15.09	3.89	ULF - UPPER LAKES FOODS, INC.	KRJ - KRJ DISTRIBUTING INC
01600016699	1	01600016699	1	SPECIAL ITALIAN RECIPE	15.09	2.89	ULF - UPPER LAKES FOODS, INC.	KRJ - KRJ DISTRIBUTING INC
01600050704	1	01600050704	1	CHEX MIX COOKIES N CRM	15.09	2.79	ULF - UPPER LAKES FOODS, INC.	KRJ - KRJ DISTRIBUTING INC
01600051235	1	01600051235	1	CHEX MIX BROWNIE SUPREME	15.09	2.79	ULF - UPPER LAKES FOODS, INC.	KRJ - KRJ DISTRIBUTING INC
02840002317	1	02840002317	1	Munchies Ult Cheddar	15.09	3.29	ULF - UPPER LAKES FOODS, INC.	KRJ - KRJ DISTRIBUTING INC
02900002111	1	02900002111	1	TRAIL MIX PEANUT BUTTER C	15.09	3.69	ULF - UPPER LAKES FOODS, INC.	KRJ - KRJ DISTRIBUTING INC
02900007862	1	02900007862	1	PLT TRAIL MIX NUT/CHOC	15.09	3.59	ULF - UPPER LAKES FOODS, INC.	KRJ - KRJ DISTRIBUTING INC
02900007880	1	02900007880	1	TRAIL MIX FRUIT N'NUT	15.09	3.59	ULF - UPPER LAKES FOODS, INC.	KRJ - KRJ DISTRIBUTING INC
04141942001	1	04141942001	1	COMBOS 7 LAYER DIP TORTIL	15.09	2.79	ULF - UPPER LAKES FOODS, INC.	KRJ - KRJ DISTRIBUTING INC

Tip **Print controls you can use with this report are described in “Print Controls” on page A2-1.**

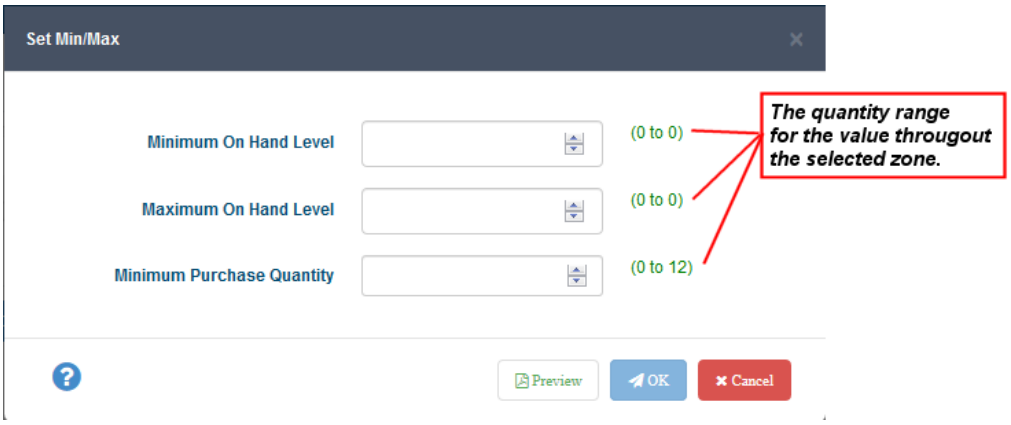
Min/Max

Important **If the Enable Min Max in Item Adjust check box is cleared in he Preferences window (see “Preferences” on page 6-1), the Min/Max button in Item Adjustment will be grayed out and none the functionality described in this section will be disabled.**

This feature allows you to set a Minimum On Hand Level, Maximum on Hand Level, and Minimum Purchase Quantity for items highlighted in this screen, paralleling the values that can be set on an item in the CDB. When you set any of these values on an item in Central Price Book, they will not impact the items in the CDB until you initiate a Distribute to Sites event.

Select the items on which you wish to set Min/Max values and click **Min/Max**. The following window appears:

Set Min/Max Values



Note Additional detail on the following concepts is available in the *CDB User's Guide*.

Minimum On Hand Level — Type the minimum number of the item you want to have on hand at all times. For example, if you want to keep 50 items in stock at all times, type, 50. Once you DTS, when you have 50 or less of the example item in stock, the CDB will flag it for reordering on the Inventory Reorder report. This value is sometimes referred to as the "trigger" value. An empty box means no change to what is current.

Maximum On Hand Level — The maximum number of units you want to stock. When the Quantity on Hand value meets or is less than the Minimum on hand level, the system knows to reorder up to the Maximum on Hand Level in increments equal to the Minimum Purchase Quantity level. And empty box means no change to what is current.

Minimum Purchase Quantity — The minimum number of units you must order from your vendor. CDB's Inventory Reorder report and CAO feature uses this value when suggesting a reorder quantity. For example, if the minimum purchase quantity is 12, it will suggest reordering in increments of 12: 12, 24, 36, 48, etc. An empty box means no change to what is currently in the price book.

Click **OK** and the values recorded in this window will be staged so that the next time you initiate a Distribute to Sites event, the values will be applied to items in the affected sites.

Preview — Click this button to call up the Min/Max Change report so you can see the impact of your proposed changes before committing them:

Min/Max Change Report

SSCS, Inc 9901 - Site 1 only
Demo not for Shipping
SALINAS, CA 93901-5013

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Computerize Daily Book
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Date: Feb 11, 2019
Name: v6666chris
Time: 3:57 PM

Min/Max Change Report

ID	Pack Size	UPC	Upc PackSz	Description	Dept	New Min On Hand	New Max On Hand	New Min Purch Qty
01600015990	1	01600015990	1	CHEX MIX TRADITIONAL	15.09	10	25	4
01600016699	1	01600016699	1	SPECIAL ITALIAN RECIPE	15.09	10	25	4
01600050704	1	01600050704	1	CHEX MIX COOKIES N CRM	15.09	10	25	4
01600051235	1	01600051235	1	CHEX MIX BROWNIE SUPREME	15.09	10	25	4
02840002317	1	02840002317	1	Munchies Ult Cheddar	15.09	10	25	4
02900002111	1	02900002111	1	TRAIL MIX PEANUT BUTTER C	15.09	10	25	4
02900007862	1	02900007862	1	PLT TRAIL MIX NUT/CHOC	15.09	10	25	4
02900007880	1	02900007880	1	TRAIL MIX FRUIT N'NUT	15.09	10	25	4
04141942001	1	04141942001	1	COMBOS 7 LAYER DIP TORTIL	15.09	10	25	4

Tip **Print controls you can use with this report are described in “Print Controls” on page A2-1.**

Inactive

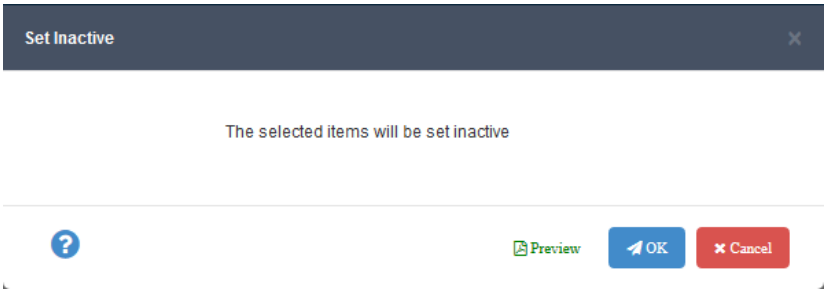
Inactive items are those you choose to stage for permanent deletion from the CDB’s inventory database because they are no longer valid (for example, they are no longer sold in your store).

This feature of the Item Adjustment window allows you to mark selected items as inactive. Once you Distribute to Sites, they remain in the CDB site databases marked as inactive and will be sent as such to your POS during the next import. They are marked for deletion in the POS and immediately removed. However, they remain in the CDB for the time being, providing you a chance to reactivate them if necessary (in CPB, this means using the Add Item feature to re-add the item).

When you perform end-of-month procedures in the CDB items are set to inactive with a quantity on hand of **0** and are automatically purged from the digital price book.

Select the items in the Item Adjustment grid you wish to set to inactive and click **Inactive**. The following window appears:

Set Inactive



Click **OK** and the items will be staged for inactivity. When you Distribute to Sites, the items will become inactive in the selected sites.

Preview — The Set Inactive preview shows information on the items staged to be set as inactive.

Inactive Item Report

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Demo not for Shipping
SALINAS, CA 93901-5013

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Date: Feb 11, 2019
Name: v6666chris
Time: 4:24 PM

Inactive Change Report

ID	Pack Size	UPC	Upc PackSz	Description	Dept	List	Active	New Active
01600015990	1	01600015990	1	CHEX MIX TRADITIONAL	15.09	3.89	false	false
01600016699	1	01600016699	1	SPECIAL ITALIAN RECIPE	15.09	2.89	false	false
01600050704	1	01600050704	1	CHEX MIX COOKIES N CRM	15.09	2.79	false	false
01600051235	1	01600051235	1	CHEX MIX BROWNIE SUPREME	15.09	2.79	false	false
02840002317	1	02840002317	1	Munchies Ult Cheddar	15.09	3.29	false	false
02900002111	1	02900002111	1	TRAIL MIX PEANUT BUTTER C	15.09	3.69	false	false
02900007862	1	02900007862	1	PLT TRAIL MIX NUT/CHOC	15.09	3.59	false	false
02900007880	1	02900007880	1	TRAIL MIX FRUIT N'NUT	15.09	3.59	false	false
04141942001	1	04141942001	1	COMBOS 7 LAYER DIP TORTIL	15.09	2.79	false	false

Tip **Print controls you can use with this report are described in “Print Controls” on page A2-1.**

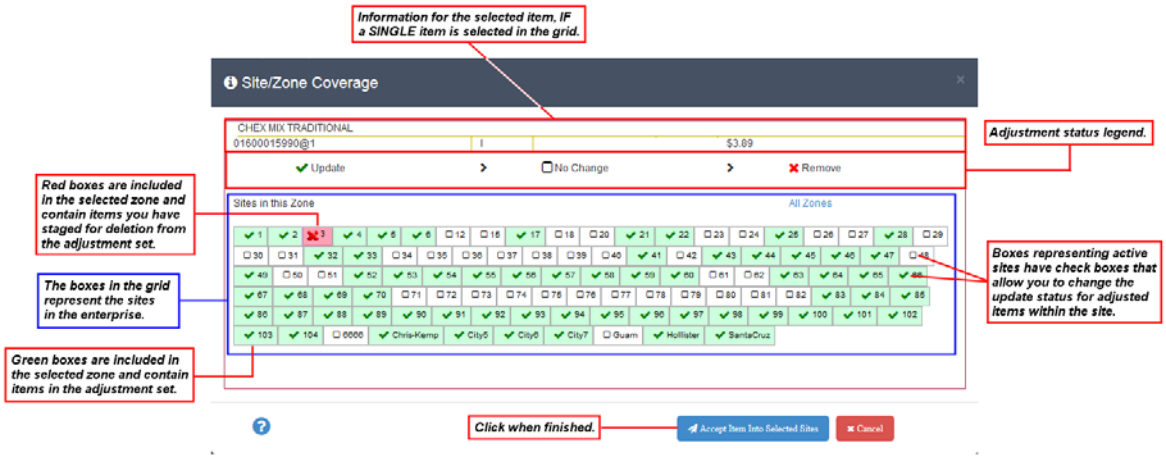
Coverage

The Coverage feature allows you to prepare adjusted items within the Coverage Zone to be pushed to sites to update existing items or add them as new ones. It also allows you to stage the adjusted item set to be set to inactive in a site or sites of choice. These changes become part of the price book when you Distribute to Sites.

To use this feature:

1. In the **Item Adjustment** window, select a set of items and click **Coverage**. The Coverage window appears:

Coverage



This window is a graphic representation to help you visualize the impact of the item adjustment as it currently stands.

If only one item has been selected in the Item Adjustment window, the information relating to it displays at the top of the Site Coverage window. If multiple items are selected, this information does not appear.

The grid represents all sites that are, or have ever been, in the selected zone. Each site is numbered corresponding to its Site #. The color of the box indicates the site's relationship to the zone and the adjusted item set's relationship to the site:

- **Gray *(not pictured)*** — Sites that are not part of the selected sites/zone. They contain no check box.
- **White** — Sites in the zone that *do not* contain an item in the selected adjustment set. They contain a cleared check box.
- **Green** — Sites in the zone that *do* contain an item or items in the selected adjustment set. They contain a check box selected with a blue check mark.
- **Red** — Sites in the zone that contain an item or items in the selected adjustment set that you have selected to remove from the site (see next step). They contain a check box selected with a red "x".

2. If desired, change the staged deployment in one or more of the following ways:
   - Select the check box inside the white box corresponding to the target site to stage the selected adjustment items to be pushed to that site.
   - Clear the check box in a green box to ensure item adjustments aren't pushed to the corresponding site.
   - Clear the check box in a green box, then select it again to stage the items in the adjustment set for removal from the target site (the box turns red). When you do this, the items will be set to inactive in the target site when you Distribute to Sites. Selecting and clearing the check box toggles removal on and off.
   - Edit deployment options for sites in other zones by clicking **All Zones** (see "All Zones" on page 4-24).
3. When you are finished, click **Accept Item into Selected Sites**. CPB updates the settings. They will be deployed when you Distribute to Sites.

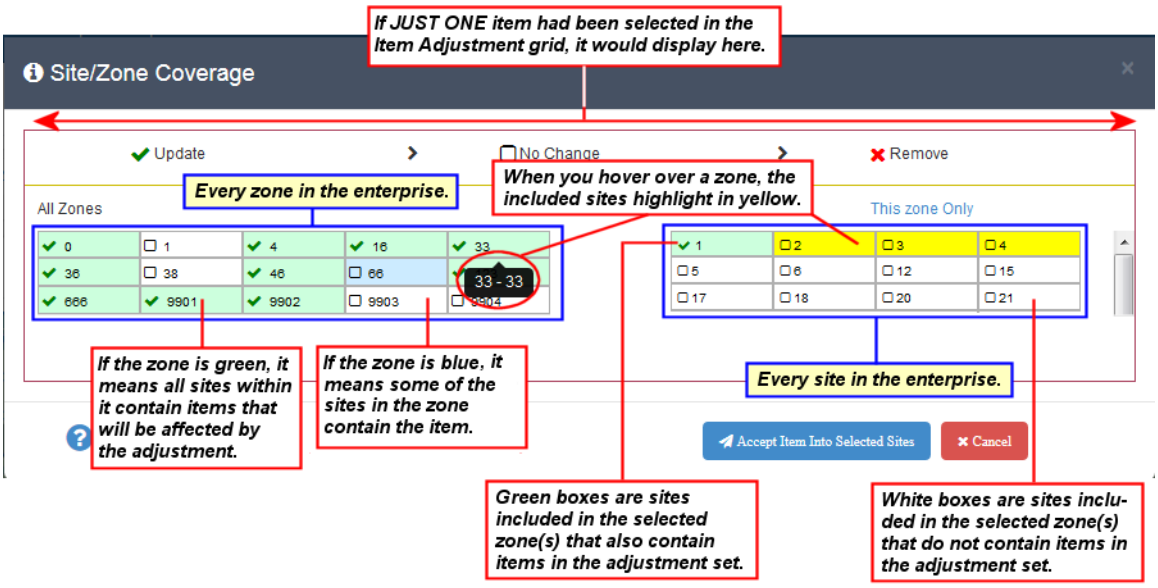
All Zones

The All Zones feature extends the Coverage window's functionality by allowing you to stage item adjustment for sites in zones outside the one selected in the Current Zone combo box.

To use the All Zones window:

1. In the **Coverage** window, click the **All Zones** link displayed at the upper right of the Sites grid. The following window appears:

All Zones



If only one item has been selected in the Item Adjustment window, the information relating to it displays at the top of the Site Coverage window. If multiple items are selected, this information does not appear.

The window provides a graphical overview of the effects of item adjustment as currently staged. It contains two grids.

The grid on the left (**All Zones**) identifies all zones within the enterprise. Each zone is represented by a box containing a check box that allows you to select the zone as a destination for the item adjustment set. This is in addition to the zone selected in the **Current Zone** combo box on the Item Adjustment window.

The grid on the right identifies all sites that are, or have ever been, in the enterprise. They function as described in the Coverage window (see "Coverage" on page 4-23).

Note **Zone and site numbering is determined and recorded using the "Zones" tab in the CDBWin Settings window in the CDB application.**

Use the window to decide if the displayed deployment is what you desire for the selected item set or if it should be changed.

The box colors in the **All Zones** grid indicate the adjusted item set's relationship to each zone as currently staged. The box colors in the sites grid on the right indicate both the site's relationship to a zone or zones and the adjusted item set's relationship to the site as currently staged:

- **Gray**
  All Zones grid: N/A.
  Sites grid: Sites that are not currently active in the selected zone or zones. They do not contain a check box.
- **White**
  All Zones grid: Zones in the enterprise that *do not* contain an item in the selected adjustment set. They contain a cleared check box.
  Sites grid: Sites in a zone or zones that *do not* contain an item in the selected adjustment set. They contain a cleared check box.
- **Green**

All Zones grid: Zones in which *all sites* contain at least one item in the adjusted item set. The check box in these boxes is selected with a blue check mark.

- *Sites grid:* Sites in a zone or zones that *do* contain an item or items in the selected adjustment set. They contain a check box selected with a blue check mark.
- **Red**

  All Zones grid: N/A.
  Sites grid: Sites in the zone that contain an item or items in the selected adjustment set that you have elected to remove from the site (see next step). They contain a check box selected with a red "x".
- **Blue**

  All Zones grid: Zones in which *some of* the sites contain at least one item in the adjusted item set. They contain a cleared check box.
  Sites grid: N/A.
- **Yellow**

  All Zones grid: When the mouse pointer hovers over a zone...
  Sites grid:...the sites contained within it highlight in yellow.

2. If desired, change the proposed deployment in one or more of the following ways. Your options are:
   - Push items in the selected adjustment set to a site in which they do not currently reside by selecting the check box inside the white box of the site to which you wish to deploy.
   - Push items in the selected adjustment set to a zone in which they do not currently reside by selecting the check box inside the white box of the zone.
   - Clear the check box in a green box to ensure you don't push adjustments for the selected item set to a zone or zones (**All Zones** grid) or a site or sites (rightmost grid).
   - Clear the check box in a green box, then select it again to stage the items in the adjustment set for removal from a site or zone (the box turns red). If you perform this option, the items will be set to inactive in the selected when you Distribute to Sites. Selecting and clearing the check box of a box in which an item resides toggles its removal on and off.

Important **Remember that when you makes changes in the All Zones grid, the color of boxes in the Sites grid may change to reflect their new status. When you make changes in the Sites grid, the color of the boxes in the All Zones grid may change to reflect their new status.**

3. When you are finished, click **Accept Item Into Selected Sites**. CPB updates the settings which will be deployed when you Distribute to Sites.

Add Item

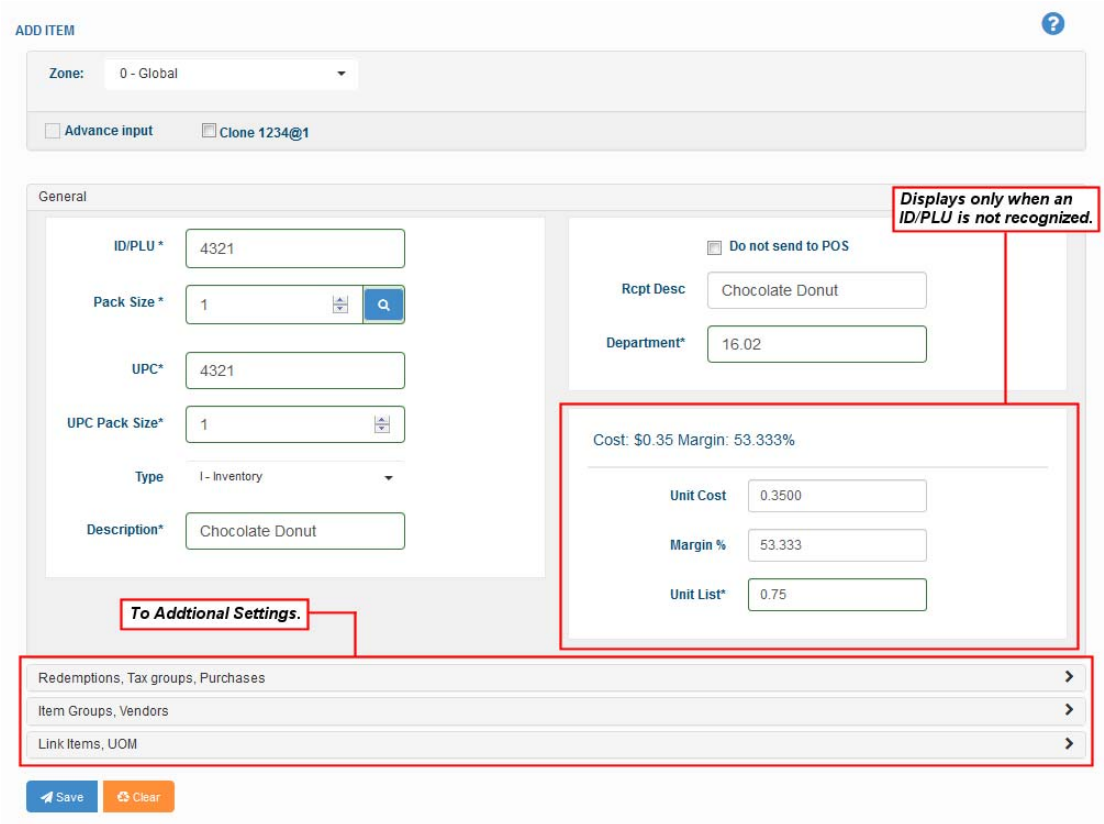
This feature allows you to add items to the digital price book for a zone you select. They will be sent to the appropriate zone in the CDB when you initiate Distribute to Sites (see "Distribute to Sites" on page 6-8). You may also call up existing items in the selected zone and edit them using this window.

Note **If you add an item that exists in a zone other than the one displayed, CPB will notify you that this is the case. When you see the prompt, click Cancel, and if you still wish to add it, the system will allow you to do so.**

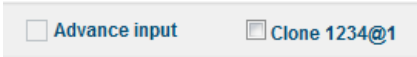
To add an item:

1. On the **Adjust** menu, click **Add Item**. The following window appears, although it will appear blank when you first display it:

Add Item



Important Two of the features in at the top of the window, are covered later in this chapter. The **Clone** feature, in which you can duplicate the displayed item to eliminate redundant entry, is covered in "Clone" on page 4-29. **Advance Input**, which allows you to add more than one item at a time, is covered in "Advanced Input" on page 4-36.



2. From the **Zone** combo box in the upper right, select the zone to which you wish to add the item.

3. Enter an **ID/PLU** and a **Pack Size** for the item. Use a forward slash (/) to expand U.P.C.-E format to U.P.C.-A (for example, /0289632 = 02820000963). CPB searches for the item in the zone's price book using the site priority set up in the CDB. One of three things can happen:

   Central Price Book finds the ID/PLU in the current zone
   The screen will populate with the item's information, which you can then edit using the instructions provided in the rest of this step. You may also choose to clone the item as described in "Clone" on page 4-55.

   Central Price Book finds the ID/PLU, but in another zone
   Proceed as instructed in "Item Found Outside the Zone" on page 4-29.

   Central Price Book does not find the ID/PLU in any zone
   The boxes remain empty waiting for you to record information as follows:

- **UPC/UPC Pack Size** — Type the UPC and the UPC Pack Size of the item. In many cases they will be identical to the ID/PLU, but it can also be a price lookup unit (PLU). The UPC can be unique for a single unit or a multi-pack when it is the lowest distribution unit (LDU). In those cases, the UPC Pack Size is **1**.

  When the multipack is consists only of single LDUs, in most cases a ringlet multipack, two inventory records must be created—one for the single and one for the multipack. They are differentiated only by their UPC Pack Size. In the case of a six-pack the single is UPC Pack Size **1** and the multi-pack is UPC Pack Size **6**.

  Use a forward slash (/) to expand U.P.C.-E format to U.P.C.-A (for example, /0289632 = 02820000963).

  Read all about the CDB inventory structure in the "Inventory" section of Chapter 1 of the *CDBWin User's Guide*.

- **Type** — From this combo box select whether the item is **I - Inventory**, **S - Sale Only**, or **X - Expense**. A Sale Only item is usually applied to parent recipe Food Service items composed of ingredients because, by their nature, these parent items cannot be tracked as inventory (or expense) items since they are only sold and never purchased and inventory quantities are only tracked on the ingredient (child) items. If the selection is X - Expense, the **Do not send to POS** check box, the **Receipt Desc** box and the **Unit List** box become disabled.
- **Description** — Type the description of the item being added (type up to 35 alphanumeric characters).
- **Do not send to POS** — You may not want certain items, such as vendor packs with unique PLUs/U.P.C.'s, to be sent to the point-of-sale (POS). If this is the case, select this check box. If an item is flagged **Do Not Send** and is part of an Item Group, it isn't added to the Item Group during the Import process. This is because the system automatically knows not to send expense items to the POS. *Not enabled for expense items.*
- **Rcpt Desc** — The description of the item as types will appear on the POS receipt if such a feature is supported by the POS (type up to 35 alphanumeric characters (type up to 35 alphanumeric characters). *Not enabled for expense items.*
- **Department** — Select the department from the combo box to which the item belongs (02–99 for inventory items, 3001 and above for expense items).

The following boxes are active only when a new, non-recognized ID/PLU is entered. They are never active for an expense item.

- **Unit Cost** — This box displays the cost of the item. Type the unit cost for the item, as desired.
- **Margin %** — This box displays the margin of the item based on what you have entered for Unit Cost and Unit List. Type the margin percentage for the item, if desired.
- **Unit List** — The unit list price for this item. If the Unit List is $0.00, the cashier will be prompted for the price (instead of selling the item for $0.00) for POS systems that support such a feature. This is for Nucleus, Passport, Ruby/Topaz, and Radiant POS systems.

4. If desired, click one or more of the additional settings icons to record additional information as described in "Additional Settings" on page 4-31.

5. When you are finished, either:

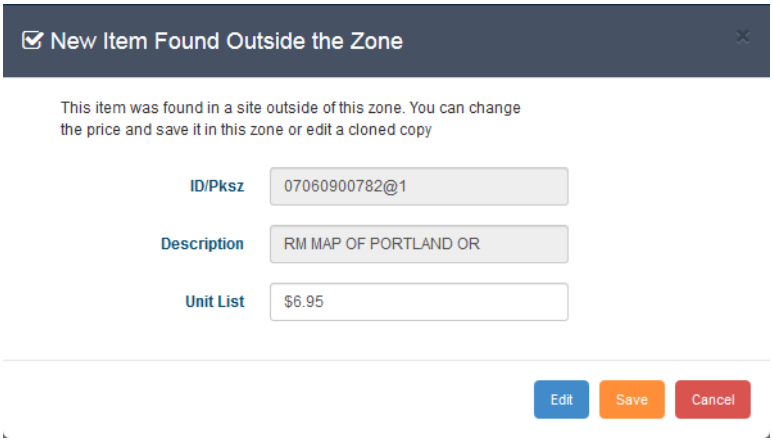
   a. Click **Save** in preparation for distributing the item to sites, or:

b. Click **Clear** to clear the form so that you can re-enter the information or cancel the addition. You will be prompted to make sure that this is the action you wish to initiate.

Item Found Outside the Zone

If you add an item in a selected zone that exists in another zone, you will be presented with the following window:

Item Found Outside Zone



The window provides an easy way to:

- Add the item to the current zone with the opportunity to change the Unit List.
- Clone the displayed item as a starting point for more extensive editing before accepting it into the current zone.

The **ID/Pksz** (Inventory ID/Pack Size) and **Description** of the item always display in non-editable boxes.

The **Unit List** box is where you type in your changed value, if so desired.

Your options are as follows:

Edit — Basically clones the current item as a template, returns you to the main Add Item window, and lets you edit any of the item's information before adding it to the current zone.

Save — Adds the item as is to the current zone, with only the option to edit the Unit List before you do. Use the instructions in "Central Price Book finds the ID/PLU in the current zone" on page 4-27.

Cancel — Cancels the process without further action.

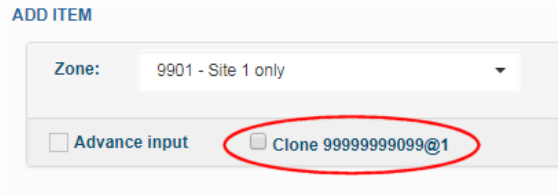
Clone

The Clone feature provides an easy way to get a start on adding an item to the CPB using an existing item as a template, saving time and keystrokes.

Important **A cloned record does not include Redemption, Tax Group, Vendor, Vendor Item #.**

To clone an item, in the Add Item screen when you enter a **ID/PLU** and a **Pack Size** that CPB recognizes, the window populates with the rest of the item's information. At the top of the window the Clone link displays notated with the displayed ID/PLU and Pack Size:

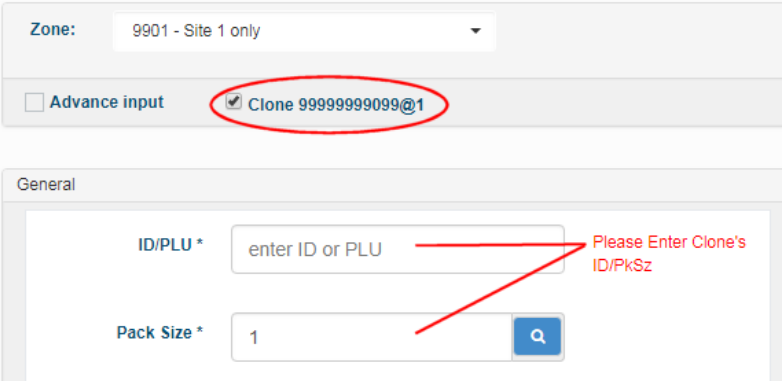
Add Item Window Displaying Clone Link



Important **Once the Clone check box has been selected, cloning remains in effect for each new item added until the Clone check box is cleared.**

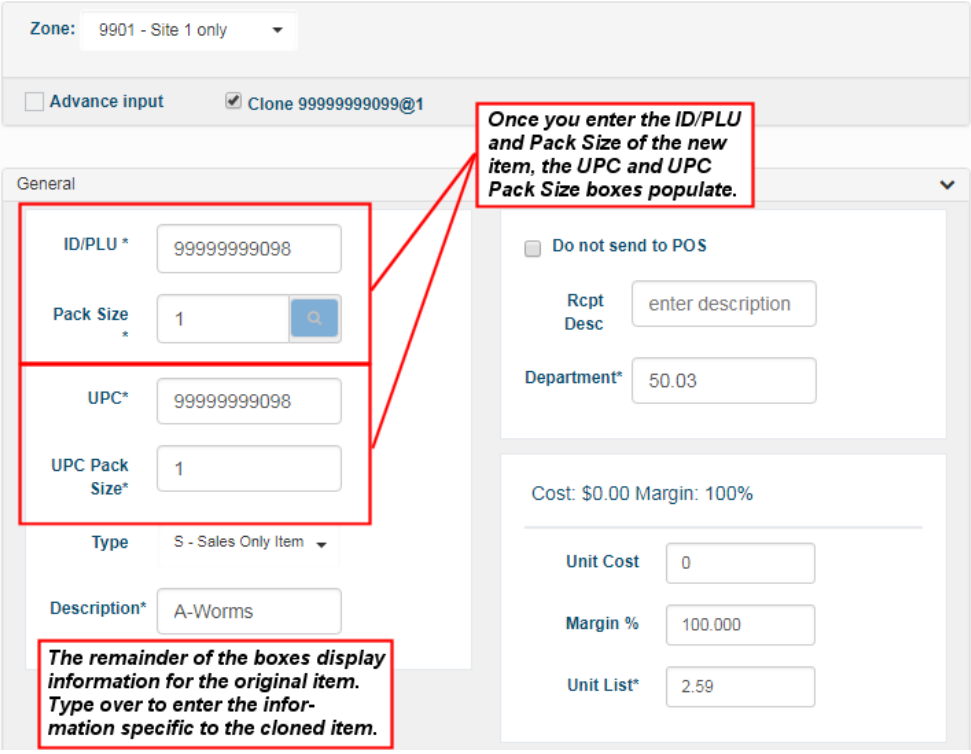
To clone the item:

1. Click **Clone**. The screen changes to prepare you for recording the cloned item's information. This includes clearing out the ID/PLU and PkSz boxes in preparation for entry:



2. Type the **ID/PLU** and **Pack Size** of the new item and press **Enter**.

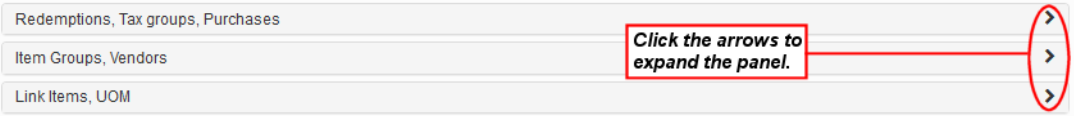
Cloned Information in Add Item



The UPC and UPC Pack Size boxes populate to match your entry, while the rest of the window retains the information for the original item that was cloned.

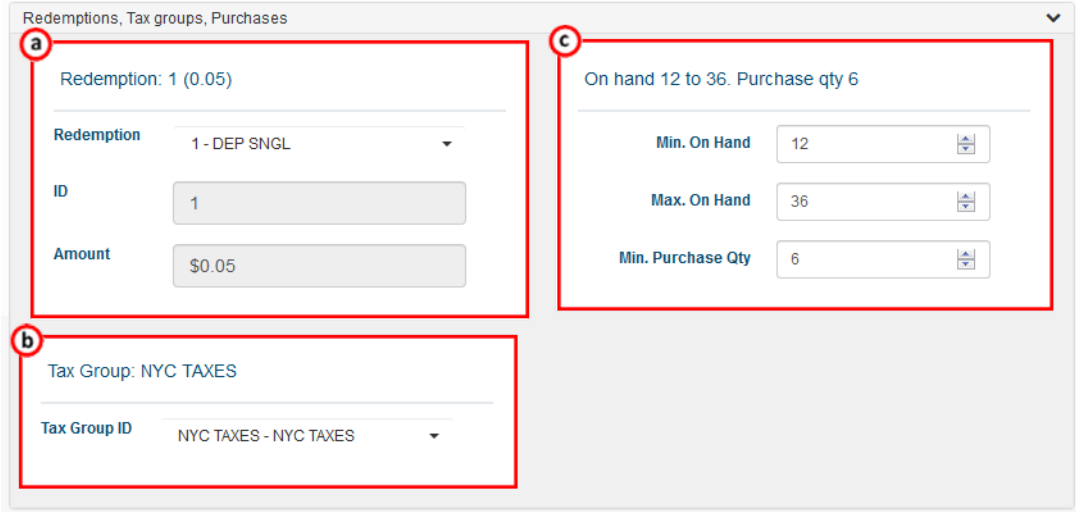
3. Type over any information that is needed to make the cloned item record accurate.
4. When you are finished, either:
   a. Click **Save** in preparation for distributing the cloned item to sites, or:
   b. Click **Clear** to clear the form so that you can re-enter the information or cancel the addition. You will be prompted to make sure that this is the action you wish to initiate.

Additional Settings



The previous section took you through the process of recording the *minimum* of information required for adding a new item to the price book. But even more information can be added to the record by clicking the arrows to the far right of the expansion panels at the bottom of the screen. Let's look at what happens when you expand each.

Redemptions, Tax groups, Purchases



When you expand this panel, it reveals the part of the window displayed in the above image.

Redemptions (a)

This part of the window helps you manage any redemption that should be on the ID/PLU you are adding. The **Redemption** combo box allows you to select a Redemption ID, as set up in the CDB, to apply to the item. If the Redemption is connected to a Linked ID that ID will display to the right of the combo box. Once you select a recognized Redemption ID the ID and Amount boxes populate with the associated values.

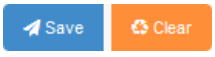
Tax Group (b)

This part of the window contains a combo box that displays all the Tax Groups you have set up in the CDB. You can use it to apply a Tax Group, as set up in the CDB, to the item appears next to the icon.

On Hand (c)

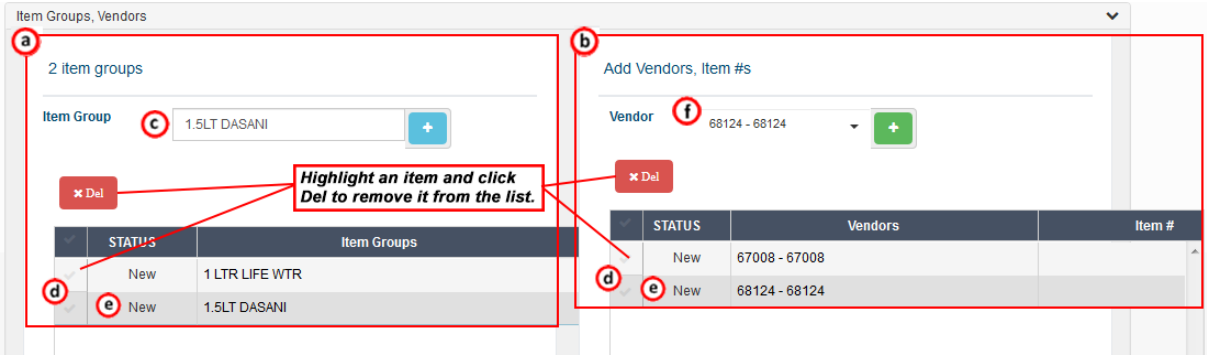
Click this icon to call up boxes that allow you to set Minimum On Hand (**Min. On Hand**) level, Maximum On Hand (**Max. On Hand**) level, and Minimum Purchase Quantity (**Min. Purchase Qty**) for the added item. The significance of these values is described in "Min/Max" on page 4-20.

Important **If you have disabled the ability to edit the above characteristics of a record using the Preferences window (see "Preferences" on page 6-1), you cannot type a Minimum on Hand Level, Maximum on Hand Level, or Minimum Purchase Quantity in this window.**



— After making entry into this screen, click **Save** to save your changes, or **Clear** in preparation for re-entering information.

Item Groups, Vendors



When you expand this panel, it reveals the part of the window displayed in the above image.

Item Groups (a)

This part of the screen allows you to add and delete Item Groups that are attached to the item.

- *To add an Item Group* to the item:

  a. Place the cursor in the Item Group combo box (c) and select an Item Group, as set up in the CDB.

  b. Click the Add button (+). The Item Group appears in the list (d). You may do this for as many Item Groups in which you want the item to be included. Multiple Item Groups will display in the list, if needed. If the item is being included in the Item Group for the first time, the label **New** (e) displays in the Status column.

- *To delete an Item Group*, select the Item Group in the list you want to delete (make sure it is highlighted) and click Del.

Important **If you have disabled the Item Group function using the Preferences window (see "Preferences" on page 6-1), you cannot select an Item Group to associate with the item you added.**

Vendor (b)

This part of the screen allows you to add and delete vendors that are associated with the item.

- *To add a vendor* to the item:

  a. Place the cursor in the Vendor combo box (c) and select a Vendor ID, as set up in the CDB.

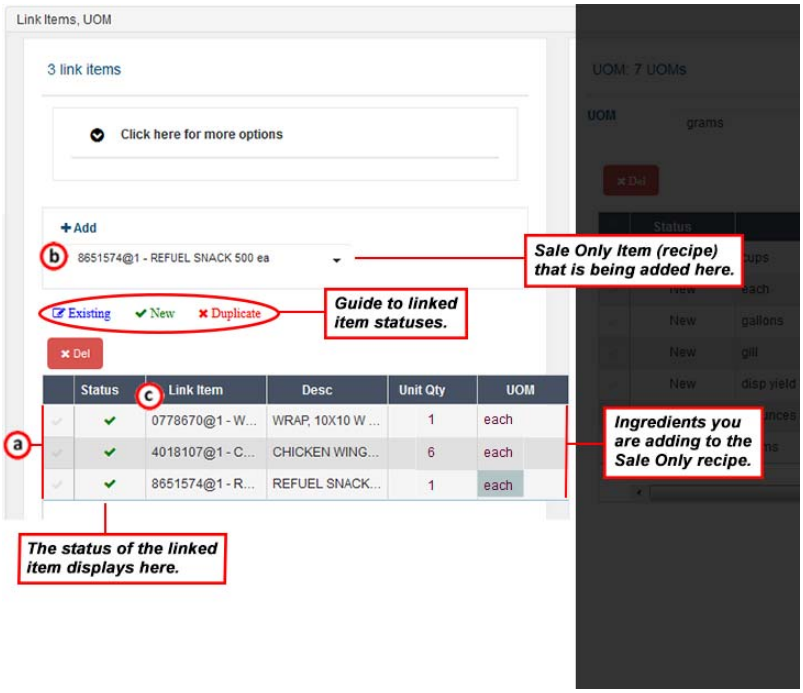
  b. Click the Add button (+). The vendor appears in the list (d). You may do this for as many vendors as you wish to attach to the item. Multiple vendors will display in the list, if needed. If the vendor is being associated with the Item Group for the first time, the label **New** (e) displays in the Status column.

- *To delete a vendor*, select the Vendor ID from the list you want to delete (make sure it is highlighted) and click Del.

Linked Items, UOM

When you expand this panel, it reveals the parts of the window displayed in the above image. First, let's look at the left side, Linked Items.

Linked Items



Use this part of the screen to build recipes—Sale Only items that are made up of ingredients, each ingredient with their own ID/PLU, Unit Qty and UOM. By adding an item and applying linked ingredients to it you are defining the added item as a Sale Only (recipe) item. The Sale Only item is a "parent" record whose "children" are the ingredients you record in this part of the window (a). You can also add or remove ingredients from existing recipes. When you push the modified recipe out to other sites, the changes will be retained.

Tip **This part of the window corresponds to the "Linked Inventory/Ingredients" tab of the CDB's Inventory Maintenance window, which is covered in the "Inventory Maintenance Window" section of Chapter 1 of the *CDB-Win User's Guide*. The rest of this entry assumes a thorough understanding of the concept.**

- *To add a linked item (aka ingredient)* to the item:

  a. Add the Sale Only (recipe) item like you would any item as described in "Add Item" on page 4-26.

  b. Click **Link Items, UOM**.

  c. Place the cursor in the **+Add** combo box (b) and enter the ID/PLU and Pack Size of the item to be linked. Start typing and CPB will make suggestions for you from which to choose. The item is added to the list (c) when you are finished with entry.

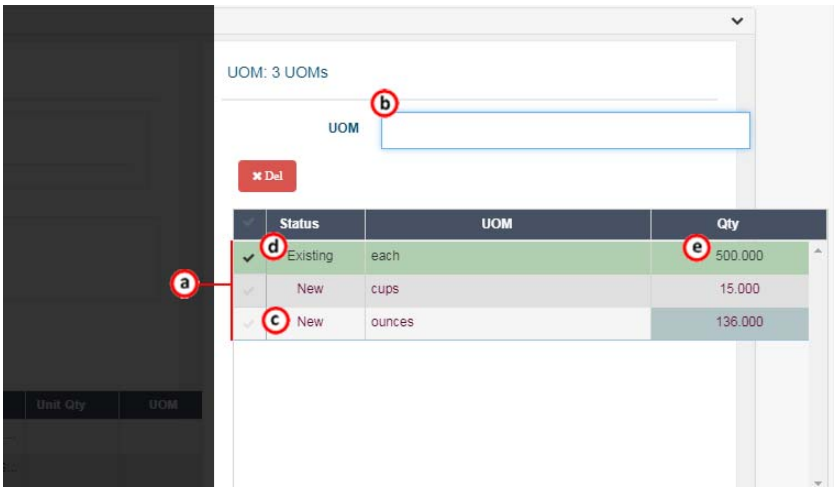
  d. Repeat adding linked (ingredient) items as needed.

e. Click **Save** (Save).

- *To delete an linked item (aka ingredient)*, select the linked item in the list you want to delete (make sure it is highlighted) and click Del .

Now let's look at the right side of the panel.

UOM



The right side of this window is where you add information that corresponds to what is entered in the CDB's "UOM" tab (covered in the "Inventory Maintenance Window" section in Chapter 1 of the *CDBWin User's Guide)*. This entry assumes a thorough understanding of the UOM concept.

Important **CPB displays the UOM detail from the priority site you establish in the CDB to determine which UOM detail is being displayed (priority order is explained in the bullets under step 6 in "Zones" on page 2-1).**

Here you have the opportunity to define the yields for the displayed item using unit quantities and units of measure (UOMs) as set up in the CDB. They display in a list (a).

Unit Qty/UOM associations can be applied to items that are purchased in units of one measure, but also need to be divided into ingredient components that use different units of measure for the purposes of being applied to Sale Only recipe items. Multiple Unit Qty/UOM parings on an item are common because food service management often requires recording total yields in different unit measures allowing you to divide the purchase unit into ingredient components that can be used for building a recipe item. The illustration above represents a carton of 10#/5x6 tomatoes based on an 85% yield (not all of the tomato is considered consumable).

Once you record these figures in the inventory record of the tomato, the appropriate ratio of each UOM is recognized throughout the system, which is essential for the CDB to correctly manage inventory quantities and the costs associated with them.

For example, if a value of **2** displays in **Quantity on Hand** box of the item's Inventory Maintenance record, the system understands this equates to 51 tomatoes (2 x 25.5), 300 slices (2 x 150.00), 272 ounces (2 x 136), and 30 cups (2 x 15).

If a recipe is made for a sandwich that includes three slices of tomato, the CDB can calculate the cost of the slices as a ratio against the cost of the purchased carton. If the average cost of the carton of tomatoes is $12.00, the CDB knows the cost of the three slices is $0.24 ($12.00/150 = $0.08 per slice x 3 slices = $0.24). It also knows to subtract a quantity of .01 (3 slices/300.00 slices on hand) out of inventory when a sandwich is sold.

- *To add a UOM* to the item:

  a. Add the Sale Only (recipe) item like you would any item as described in "Add Item" on page 4-26.

  b. Click **Link Items, UOM**.

  c. Place the cursor in the **UOM** combo box (b), A list of UOMs displays.

  d. Select the UOM of choice from the list. It appears in the list with the status **New** (c). (If the linked item had already been applied to the added item, it would display the status **Existing** (d).

  e. Enter a **Qty** (quantity) to be paired with the UOM (e) by typing it and pressing **Enter**. If you were entering a pack of tortillas you would purchase for making tacos, a typical Unit Qty/UOM would be **60 each** (meaning there were 60 tortillas in the pack you purchase).

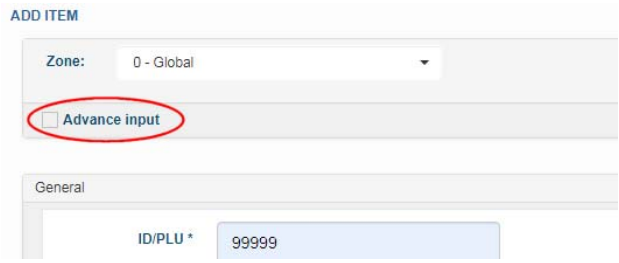
  f. Repeat steps c–e for every UOM you wish to add to the recipe.

  g. Click **Save** (Save).

- *To delete a UOM*, select the UOM in the list you want to delete (make sure it is highlighted) and click Del .

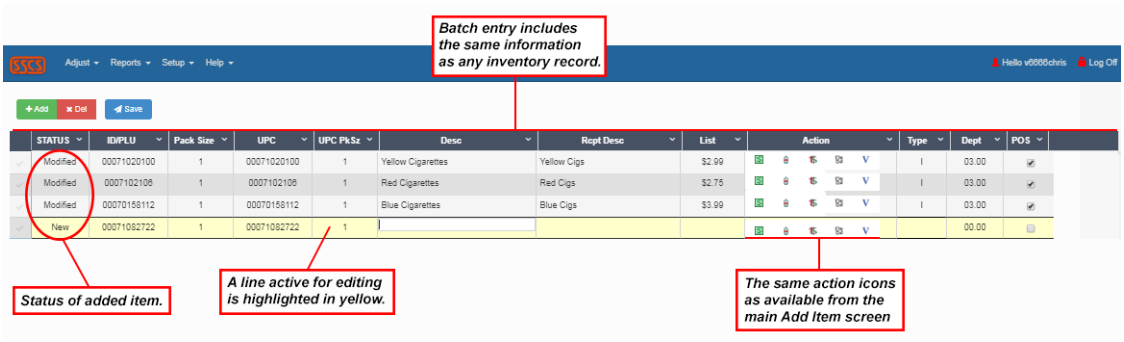
Advanced Input

For speed and convenience, CPB provides you the opportunity to add more than one item at a time. To do this, select the **Advanced Input** check box at the top left of the Add Item window:



The following window appears, although it is blank when you first display it:

Advanced Entry



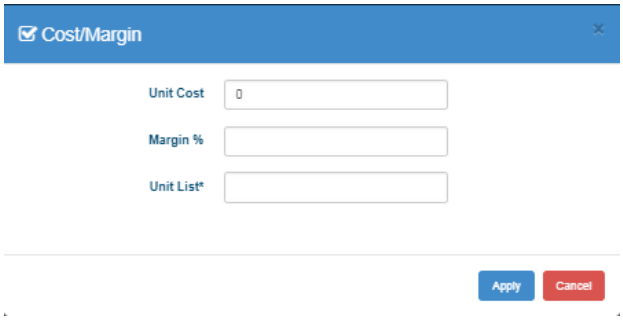
Work through this continuous list as follows:

1. Select a Site/Zone from the combo box in the upper left-hand corner of the screen.
2. Click the **Advance Input** check box. The cursor moves to the **ID/PLU** column of the first row in the continuous box. The entire line becomes highlighted in yellow when you hover over it with the mouse pointer.
3. Type the **ID/PLU** of the added item and press **Tab**
4. The cursor moves to the **Pack Size** box for editing, if necessary. Keep tabbing through the **UPC**, **UPC PkSz**, **Desc**, **Rept Desc**, and **List** boxes for the chance to make entry into each.
5. When you get to the **Action** column, click the icon that corresponds to what you want to do (each of the five options is also available by opening the expansion panels at the bottom of the main Add Item screen). Read about Action icons as follows:
   - "Action Icon – Cost" on page 4-37.
   - "Action Item – Redemption" on page 4-38.
   - "Action Item – Tax Group" on page 4-39.
   - "Action Item – Item Group" on page 4-39.
   - "Action Item – Vendor" on page 4-40.
6. After you are finished working with the Action icons, Continue after the icon column by typing any necessary information in the Type and Dept (Department) boxes, pressing **Tab** after each.
7. If you wish this item to be sent to the POS once it is Distributed to Sites and resident in the CDB, select the **POS** check box.
8. Click Save when you are finished.
9. To start adding another new item, click + Add and repeat steps 3–8.
10. To transfer added items to the appropriate Sites/Zones of the CDB, initiate a DTS event.

Important **To delete an item in the Advance Input Add Items list, select the item so that it is highlighted in green and click ✖ Del .**

Action Icon – Cost

— Click this icon to call up a window that allows you to edit cost and margin information for the item:



Unit Cost — Record a unit cost for the new item here using decimal format. The box assumes four decimal places. Recording information on an added item in this window is the only time you can record a Unit Cost in CPB. Though you can attempt to edit the Unit Cost of an existing item through this feature, you will only be allowed to do so if the **Enable Unit Cost in Item Adjust/Add Item** check box in the Preferences window has been selected (this type of Unit Cost change does not affect the CDB's average cost value on the item after a Distribute to Sites event).

Margin — You can either record a margin manually, or let CPB calculate it for you based off of the unit cost and unit list. The box assumes three decimal places.

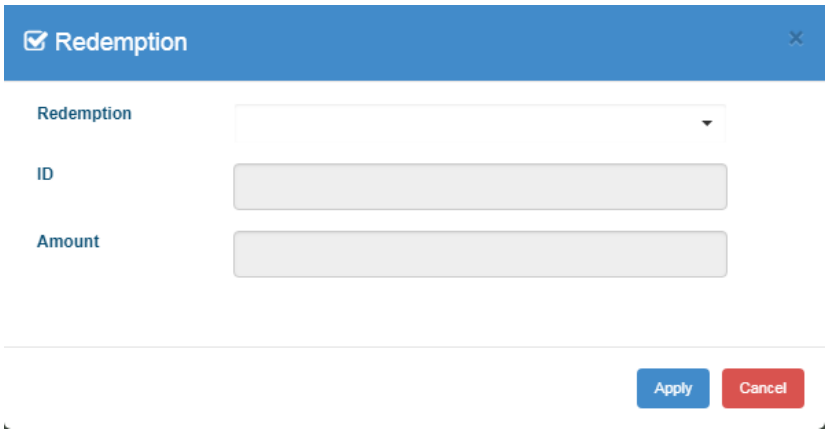
Unit List — If desired, record a Unit List price for the item. The margin will adjust accordingly.

Apply Cancel — When you are finished, click **Apply** to accept the changes and commit them to the system, or **Cancel** to discard your entry.

Important To delete an cost/margin entry in the list, select the item so that it is highlighted in green and click ✖ Del.

Action Item – Redemption

— Click this icon to call up a window that displays all the Redemptions you have set up in the CDB.



Redemption — This combo box allows you to select a Redemption ID, as set up in the CDB, to associate with the item. If the Redemption is connected to a Linked ID that ID will display to the right of the combo box.

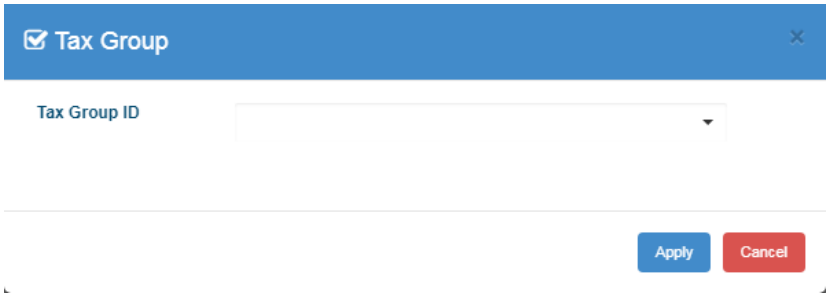
ID/Amount — Once a Redemption record is selected its ID and Amount appear in these non-editable boxes.

Apply Cancel — When you are finished, click **Apply** to accept the changes and commit them to the system, or **Cancel** to discard them.

Important To delete a redemption entry in the list, select the item so that it is highlighted in green and click Del.

Action Item – Tax Group

—Click this icon to call up a window that allows you to select a Tax Group ID, as set up in the CDB, to apply to the item.



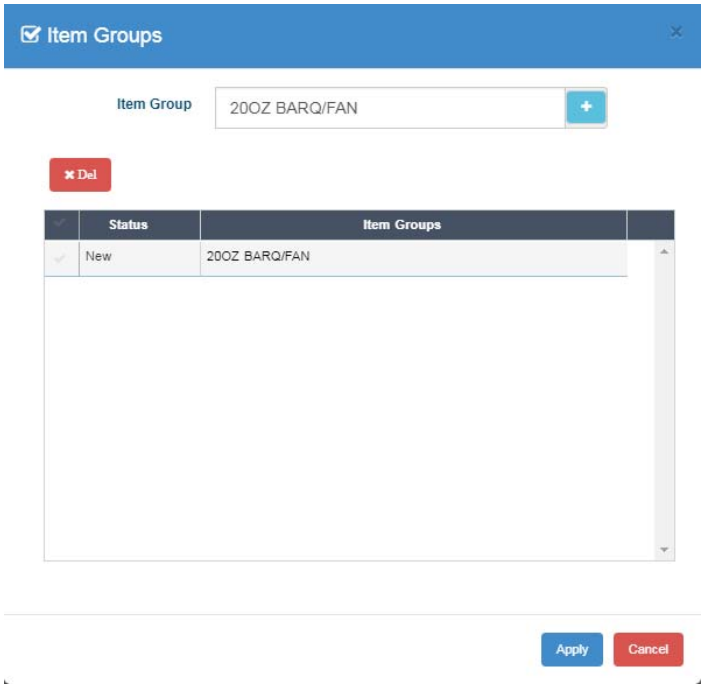
Tax Group ID — The combo box allows you to select a Tax Group, as set up in the CDB, to associate with the item.

Apply Cancel — When you are finished, click **Apply** to accept the changes and commit them to the system, or **Cancel** to discard them.

Important To delete Tax Group entry in the list, select the item so that it is highlighted in green and click Del.

Action Item – Item Group

—Click this icon to call up a window that allows you to apply one or more Item Group IDs, as set up in the CDB, to the displayed item.



Item Group — The combo box allows you to select an Item Group, as set up in the CDB, to associate with the item. Start typing in the box (when active, the box is highlighted) to call up the Item Group combo box, select an Item Group, and click the plus sign (+) to apply it. The name displays in the Item Groups column.

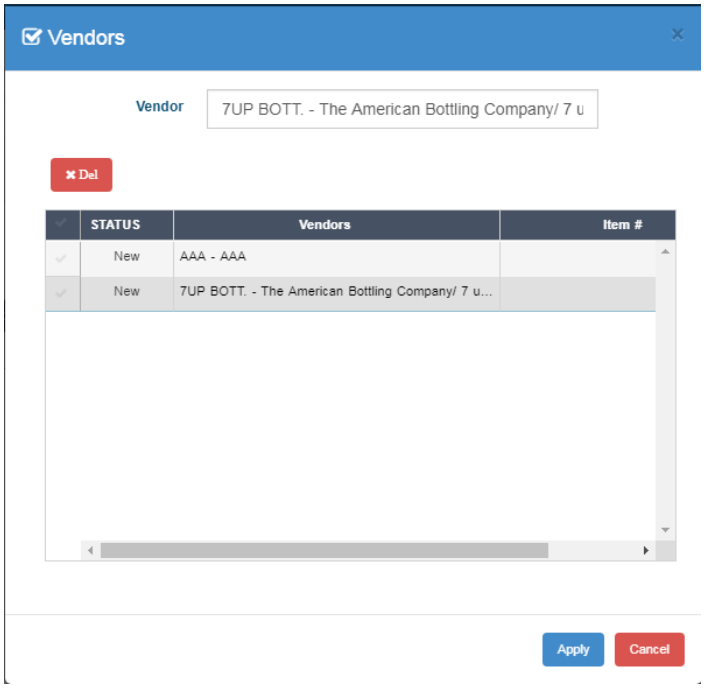
Status — If the Item Group has already been applied to an item, it displays **Existing** in this column. If this is the first time the Item Group has been applied to the item, this column will read **New**.

Apply Cancel — When you are finished, click **Apply** to accept the changes and commit them to the system, or **Cancel** to discard them.

Important **To delete an Item Group entry in the list, select the item so that it is highlighted in green and click Del.**

Action Item – Vendor

V —Click this icon to call up a window that allow you to apply a vendor or vendors, as set up in the CDB, to the displayed item.



Vendor — The combo box allows you to select Vendor ID, as set up in the CDB, to associate with the item. Start typing in the box (when active, the box is highlighted) to call up the Vendor combo box and select a vendor to apply it to the item. The name displays in the Vendors column.

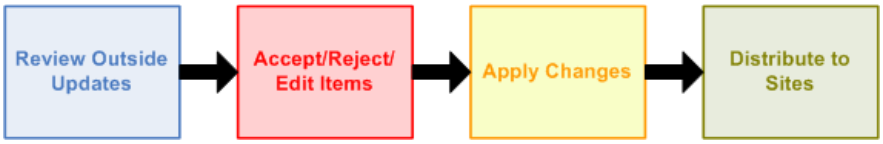
Status — If the vendor record has already been applied to the item, it displays **Existing** in this column. If this is the first time the vendor record has been applied to the item, this column will read **New**.

Apply Cancel — When you are finished, click **Apply** to accept the changes and commit them to the system, or **Cancel** to discard them.

Important To delete a vendor entry in the list, select the item so that it is highlighted in green and click Del.

Outside Updates

Central Price Book's Outside Updates stages, for your approval, new additions and changes to pricing records imported into CPB through Vendor Import and Site Import. (New Items added in Central Price Book are not considered to be Outside Updates because they are part of CPB: they come from "within," not come from the "outside".)



You are provided the opportunity to review, accept, and edit potential changes and additions in the Outside Updates screen before they are committed to the zones/sites of your choosing. Accept proposed changes and additions by highlighting the records, initiating the act of accepting/rejecting/editing them, and clicking **Apply Changes**. Push them out to the sites using the **Distribute to Sites** feature (as discussed in "Distribute to Sites" on

page 6-8). If the items being pushed are linked items (such as recipe items and components), the linked item set is pushed to the sites in the zone.

Only changes to certain parts of a pricing record trigger an outside update:

Changes Triggering Outside Update	Changes *Not* Triggering Outside Updates
• Description	• Site #
• Receipt Description	• ID/PLU
• Department/Subdepartment	• Pack Size
• Unit List	• U.P.C.
• Unit Cost[a]	• U.P.C. Pack Size
• Tax Group ID	• Inventory Type
• Redemption ID	

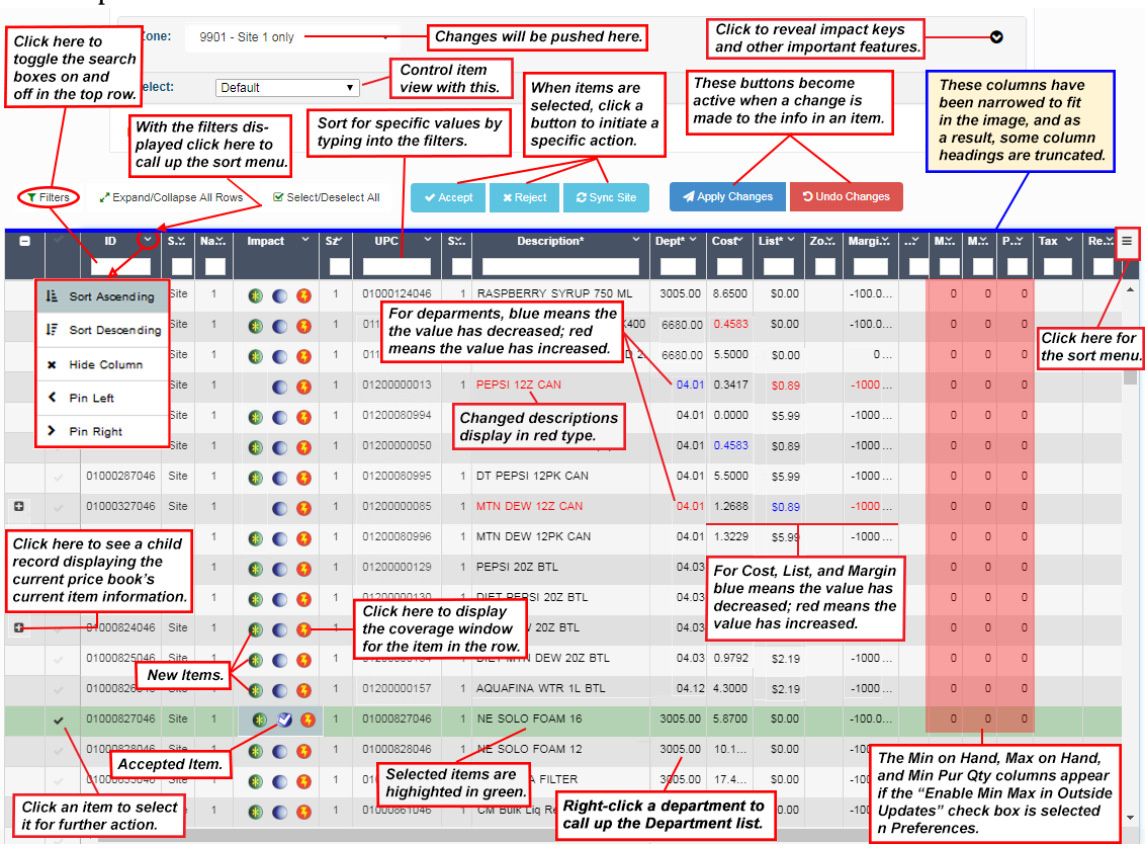
a. When **Enable Unit Cost comparison for Outside Updates** is enabled in the Settings screen or in a vendor file with item costs has been imported.

Overview of Outside Updates Procedural Workflow

The following is the basic procedural workflow of the Outside Updates process:

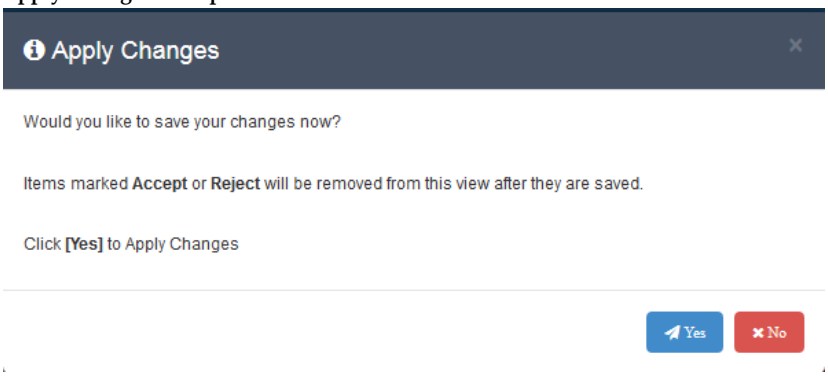
1. On the **Adjust** menu, click **Outside Updates**. A window like the following appears (it may be clear of items if you have not initiated a Site Import yet):

Outside Updates



2. Select the zone for which you want to display outside updates by using the **Zone** combo box in the upper left-hand corner. This selection is important, because accepted changes to records are pushed out to the sites in the selected zone.
3. Use the list of outside updates to prepare selected items to be distributed to sites in the selected zone. The records are of any item that has been added or has had its information changed (updated) as a result of a Vendor Import or Site Import event. Item records are being staged, giving you opportunity to accept, reject or edit them before they are pushed to the sites in the zone. Or you can use the **Select/Deselect** link at the top of the window to select or clear all records at once.
4. Once you have the Outside Updates you want, either click Apply Changes to apply the additions and changes to your price book—including if you are syncing a site(s)—or if you have second thoughts, click Undo Changes to cancel the acceptance process and continue working. If you apply the changes, you will be prompted as follows:

Apply Changes Prompt



5. Click **Yes** to get the items ready to distribute to sites. Proceed to step 6.

   Click **No** to return to the Outside Updates screen to continue working.
6. After CPB finishes applying the changes, you are returned to the Outside Updates screen. You can now distribute the pricing information changes to the CDB zone you selected using the Distribute to Sites feature (see "Distribute to Sites" on page 6-8). After you Distribute to Sites, distributed items no longer display in the Outside Updates window.

Now that we've gone over the basic steps to the process, let's go into a little more detail on its specific features.

Upper Screen

The upper part of the screen is hidden when you first come into the screen. Click the expansion button at the top right of the page (a) to see it.

Zone — Use the combo box (b) to select the zones to which you want the outside updates pushed.

Impact Keys — This guide (c) provides the meaning of the symbols in the Impact Column, which we describe fully in "Impact" on page 4-48.

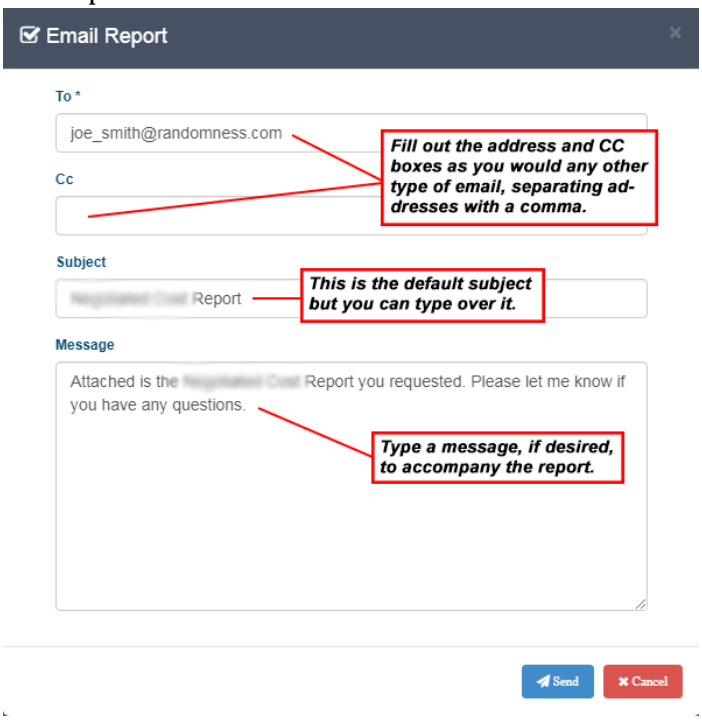
Select — This combo box (d) allows you to control the view of the Outside Updates that appear in this screen as follows:

- **Default** — Shows both items that have changed and items that are new.
- **Hide New Items** — For a "changed items only" view.
- **Show Only New Items** — For when changed items are cluttering your screen.
- **Show Only Price Changes** — For a view of only items whose list price has been changed.
- **Show Only Cost Changes** — For a view where the cost has changed and nothing else.

E-mail Report View Report — Using this pair of buttons, you can email the complete list of Outside Updates or view it:

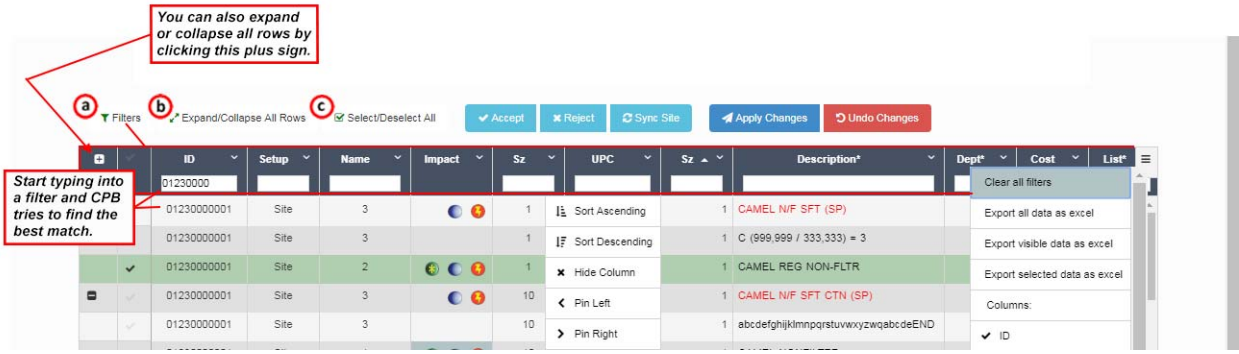
- Click **View Report** to call up a report containing the items in the Outside Updates screen. A sample report is available in "Outside Updates Report" on page 4-51.
- Click **E-mail Report** to call up the following window:

Email Report



Fill out this simple form and press Send to email the report.

Top of List Controls



The controls at the top of the Outside Updates list helps you initiate actions and organize views of displayed information. Let's look at its specific features, moving from left to right.

Filters (a) — Click the word **Filters** to toggle on and off the dark gray filters that appear at the top of each Outside Updates column. Start typing into a filter and the CDB changes the column information to best match your input.

Expand/Collapse All Rows (b) —Expands all of the parent/child records in the Outside Updates screen. Parent/child records and the significance of expanding them are explained in "Parent/child records" on page 4-48.

Tip **The Expand/Collapse All Rows command can also be executed by clicking the small plus sign ( ) at the top left of the screen when the Outside Updates filters are displayed.**

Select/Deselect All (c) — This is a simple way to toggle on and off all the selections in the Outside Updates window (which can also be selected individually by clicking the specific item[s] on or off).

Accept Reject —The items listed in the Outside Updates screen are presented for you to consider before you commit them to the price book. Prepare to accept items by highlighting them and clicking **Accept**. Prepare to deny them from being entered into the price book by highlighting them and clicking **Reject**, in which case the pricing information in the Computerized Daily Book will revert to what is currently in Central Price Book.

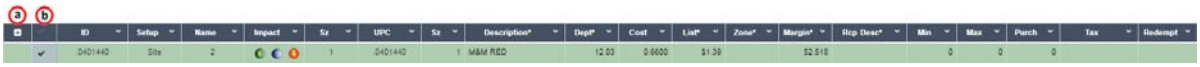
These changes are committed to the price book when you click the **Apply Changes** button.

Sync Site —If you wish to accept a new record or a change to an existing record, but *only* into the site from which it was generated (this is the site # that displays in the **Name** column), select this option. The change won't affect any other site in the zone. When you Synch Site a record, the status icon in the Impact column changes to . Please note that the Synch Site function is not applicable to items whose pricing changes were generated by a Vendor Import event. You can synch multiple records by highlighting them and clicking **Synch Site** at the bottom of the window.

Records that are designated as Synch Site are removed from the continuous list after you **Apply Changes**.

— Whatever action you take in this window, it does not get committed to the price book until you click **Apply Changes**. If you have second thoughts about what changes and additions you have staged to affect the price book, you can click **Undo Changes** and continue working.

Columns Explained



Tip **You can control the number of columns that are displayed by using the Columns Menu. See "Columns Menu" on page 4-7 for more details.**

The information contained in the Outside Updates columns, from left to right, are as follows:

— Click the plus sign (a) to expand all parent/child records at once (see "Parent/child records" on page 4-48 for a complete explanation of how they work).

— When you select a record in the screen by clicking on it, not only does the record become highlighted in green, a check mark appears in this column. If you want to select all items at once, click the check mark at the top of the column (b).

ID — The Inventory ID of the item that has been updated.

Setup/Name — The display-only boxes in these two columns together describe the origin of the new or changed item record. The options for the Setup column are **Site** and **Vendor**. The options for the Names column that complement these designations are, respectively, **Number** and **Vendor** (as set up in the CDB).

Impact — Please see "Impact" on page 4-48 for a complete explanation.

Sz/UPC/Sz — These display-only boxes correspond to the information on the item record: ID Pack Size, UPC value, and UPC Pack Size.

Description — The description of the item.

- This box accepts typed in-line editing either through tabbing until you get to the column, or by placing the cursor in the box and clicking.
- The characters display in red if the Outside Update has caused a description change from what was in the price book previously.

Dept —The department in which the item resides.

- This box accepts typed in-line editing either through tabbing until you get to the column, or by placing the cursor in the box and clicking.
- Right click when the cursor is in this box to display a list of departments and subdepartments from which you can select, an easy way to change the item record's department as shown in "Department" on page 4-16.
- If the Outside Update event has caused a change in department number to a greater value, the characters display in red. If there has been a change in department number to a lesser value, then that characters display in blue.

Cost —The cost of the item to you.

- Cost changes appear as Outside Updates only if you select the **Enable Unit Cost comparison for Outside Updates** check box in the Preferences screen (see "Preferences" on page 6-1).

- This box is not editable. It is for display purposes only.
- If the Outside Update event has caused a change in the cost to a greater value, the characters display red. If the change is to a lower value, the characters display blue.

List — The list price of the item.

- This box accepts typed in-line editing either through tabbing until you get to the column, or by placing the cursor in the box and clicking.
- Changes you make to the list value will adjust the margin to reflect the change.
- If the Outside Update event has caused a change in the list to a greater value, the characters display red. If the change is to a lower value, the characters display blue.

Zone — See "Zone" on page 4-50

Margin — The margin of the item.

- This box accepts typed in-line editing either through tabbing until you get to the column, or by placing the cursor in the box and clicking.
- Changes you make to the margin value will adjust the list price to reflect the change.
- If the Outside Update event has caused a change in the margin to a greater value, the characters display red. If they change is to a lower value, the characters display blue.

Important **If you want list price changes that are resident in the vendor file to be recognized by the CPB when they are imported and to appear as changes in the Outside Updates screen, make sure you have selected the Apply Vendor List Price check box in the Preferences window (see "Preferences" on page 6-1).**

Rcp Desc —The receipt description of the item.

- This box accepts typed in-line editing either through tabbing until you get to the column, or by placing the cursor in the box and clicking.
- The characters display red if the receipt description has been changed as part of the outside updates process.

Min — The Minimum Quantity on Hand associated with the item.

- This column does not appear if the **Enable Min Max in Outside Update** check box in the preferences screen is cleared (see "Preferences" on page 6-1).
- This box accepts typed in-line editing either through tabbing until you get to the column, or by placing the cursor in the box and clicking.
- The characters display red if the Minimum on Hand Quantity's value has decreased as a result of an Outside Update event. The characters display blue if the Minimum on Hand Quantity has increased as a result of an Outside Update event.

Max — The Maximum Quantity on Hand associated with the item.

- This column does not appear if the **Enable Min Max in Outside Update** check box in the preferences screen is cleared (see "Preferences" on page 6-1).
- This box accepts typed in-line editing either through tabbing until you get to the column, or by placing the cursor in the box and clicking.
- The characters display red if it the Maximum on Hand Quantity's value has decreased as a result of an Outside Update event. The characters display blue if

the Maximum on Hand Quantity has increased as a result of an Outside Update event.

Purch — The Minimum Purchase Quantity for the item.

- This column does not appear if the **Enable Min Max in Outside Update** check box in the preferences screen is cleared (see "Preferences" on page 6-1).
- If the Outside Update event has caused a change in the quantity to a greater value, the characters display blue. If they change is to a lower value, the characters display red.

Tax —The Tax ID associated with the item.

- This box is non-editable.
- The Tax ID for the item displays red if it has been changed as a result of the Outside Update event.

Redempt — The Redemption ID, if any, associated with the item.

- This box is non-editable.
- The Redemption ID for the item displays red if it has been changed as a result of the Outside Update event.

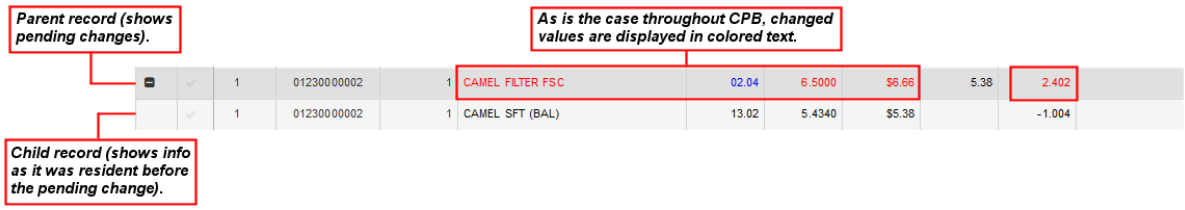
Action — This is another way to access the action items at the top of the window through a short menu with the selections, **No Action**, **Accept**, **Reject**, and **Synch Site**.

Parent/child records

The Outside Updates window can display the relationship between *parent records* and *child records* for comparison's sake. Parent records display proposed (staged) changes for item information, changes that have not yet been accepted into the rest of the selected zone. Child records display pricing information, as it is currently in the CDB before the proposed change.

You can select individual records for comparison or select them all at once.

To view the child of a parent record, click the small ⊞ at the far left of the record. The proximity of the records to each other makes for an easy comparison when deciding to accept the change or not. Parent/child records look like this when expanded:



The parent/child relationship does not apply to new items staged for acceptance, only those that previously existed before the updating event.

Impact

This column displays icons that:

- Represent the status of the pricing record
- Function as buttons that allow you to perform an action to modify the record in preparation for distributing to the zone's sites.

Note **To help you remember what the icons mean, an Impact Key is provided just above the continuous list in the main part of the window *when the top panel of the screen is expanded*.**

Here's an explanation of each item.

— This icon appears on every new item record being proposed for acceptance into the sites of the selected zone.

— This icon allows you to set the status of a record in preparation for it being accepted into the price book. When you click on the shape, the **Select an Action** menu appears:

Select one of the following check boxes to mark a selected record as follows:

No Action — If you apply one of the other three menu options to the selected record and decide to change your mind before committing to it, select this check box to return the record to its previous status. The status **No Action** displays in the Action column to the far right of the record.

Accept — If you want to accept a new record or a change to a selected record in preparation for pushing it out to the CDB sites within the selected zone, select this check box. When you accept an outside update, the status icon changes to marking it ready to **Apply Changes**, after which you would Distribute to Sites. The status **Accept** displays in the Action column to the far right of the record. You can accept multiple records by highlighting them and clicking **Accept** at the bottom of the window. Records designated Accept are removed from the continuous list after you Apply Changes.

Synch Site — If you wish to accept a new record or a change to an existing record, but *only* into the site from which it was generated (this is the site # that displays in the **Setup Name** column), select this check box. The change won't affect any other site in the zone. When you Synch Site a record, the status icon changes to . Please note that the Synch Site function is not applicable to items whose pricing changes were generated by a Vendor Import event. You can synch multiple records by highlighting them and clicking **Synch Site** at the bottom of the window. Records designated Synch Site are removed from the continuous list after you Apply Changes.

Reject —If you wish to reject the change or addition, select this check box. When you Reject Changes, then a Distribute to Sites event occurs, the item in the CDB site from where the change or addition was initiated will be returned to its previous state (as it appears in the child item if it is a changed record). If the item is a new item, it will be set to inactive in the CDB site from which it was added (consult your *CDB User's Guide* for information on inactive items). When you reject a proposed change or addition, the status icon changes to . The status **Reject** displays in the Action column to the far right of the record. You can reject multiple records by highlighting them and clicking **Reject** at the bottom of the window. Records so designated are removed from the continuous list after you Apply Changes.

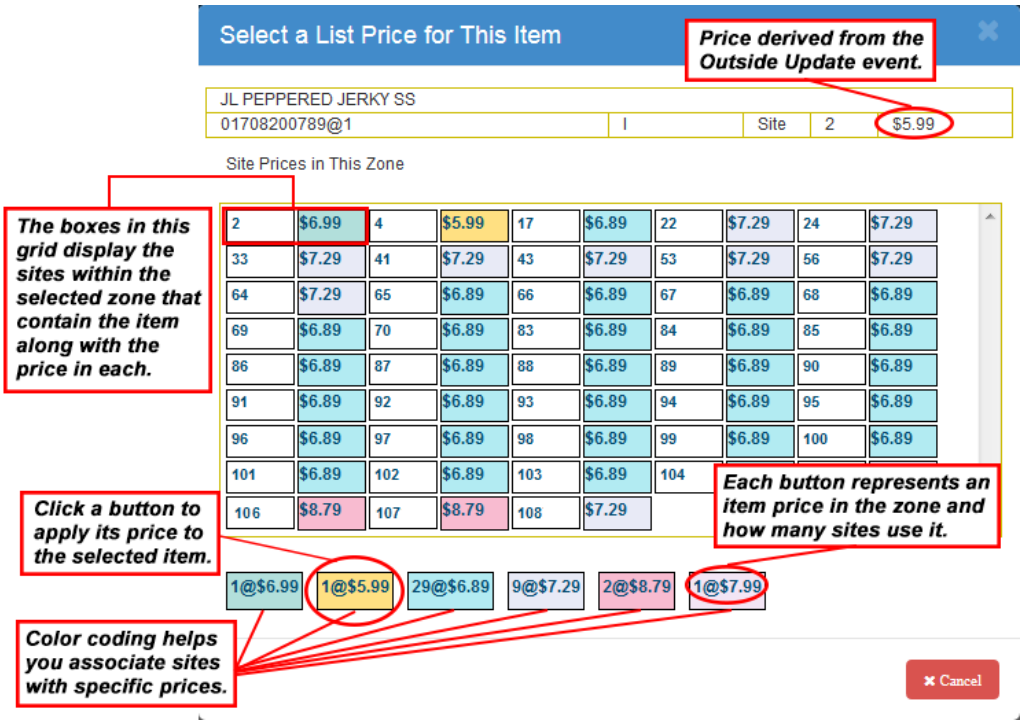
— Click this icon to call up a coverage window similar to that which is available through the Item Adjustment window. Read more about it in "Coverage for Outside Updates" on page 4-50.

Zone

The value that displays in this column is zone priority price of the item (if no price displays here it means the it is a new item that is not yet officially resident in the price book). This comparison display is useful because you can see how the item price generated by the Outside Update compares to that of the priority site, giving you the chance to adjust accordingly.

Click on the price in the **Zone List** column to call up a window that allows you to review all the prices within the selected zone:

Zone List



The basic information about the item whose Outside Update price is being staged for Distribution to Sites displays at the top of this window.

The **Set Prices in This Zone** grid displays every site in which the displayed item resides. A white box contains the site number, the color-coded box to its immediate right contains the price for the item in that site.

Right below the grid is a set of buttons representing variations in item price (if any) within the zone. In addition, each button shows how many sites in the zone carry the item at that price (this value comes after the "@"). Color-coding helps you identify the specific sites associated with the price (see above illustration). To replace the price that resulted from the Outside Update event, click the button on which the replacement price displays. The selected price will appear in the List column in red type, waiting to be distributed to sites.

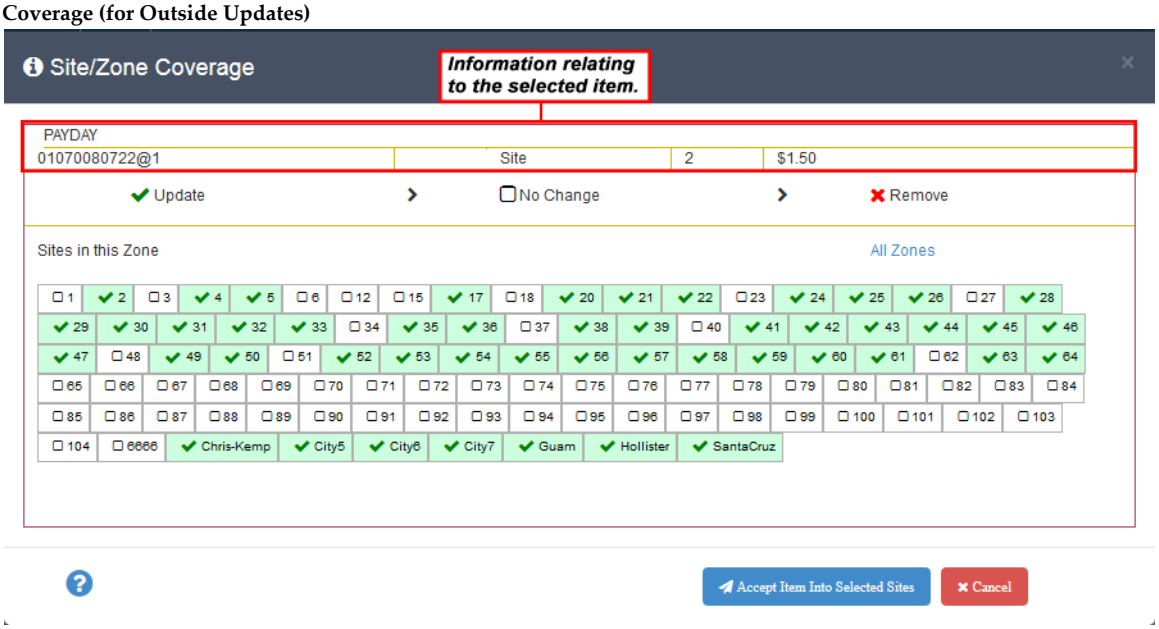
Coverage for Outside Updates

This feature allows you to select a record in the Outside Updates screen in preparation for it to be pushed to the site or sites of your choice, either in the currently selected zone or outside of it.

This contrasts with standard Outside Update behavior in which additions/changes are pushed *to every site in the* ***selected*** *zone*. The Coverage function allows you to be more specific by selecting target sites for changes/additions.

Outside Updates Coverage is performed on a record by record basis. Select an item and click the **Coverage** icon ( ). The following window appears:

Coverage (for Outside Updates)



To use this window, follow the instructions in "Coverage" on page 4-23 for Item Adjustment. The only differences in the Outside Updates version of the Coverage window is that the information for the selected item appears at the top and you click Accept Item Into Selected Sites when you are finished.

Outside Updates Report

The Outside Updates report shows every Outside Update item in the zone you selected, whether they are changed items or new ones (controlling the display with the **Select** combo box has nothing to do with what prints out—you get every record for the selected the zones and sites, regardless).

The Print Report command is in the upper part of the Outside Updates screen and when you first access the screen it will be hidden by the upper panel:

1. Click the small expansion icon ( ) at the top right of the window.
2. Click View Report to display to display the report:

Outside Updates Report

SSCS, Inc 9901 - Site 1 only
Demo not for Shipping
SALINAS, CA 93901-5013

Service Station Computer Systems, Inc.
Central Price Book
Copyright © 1984-2019

Date: Apr 19, 2019
Name: v6666chris
Time: 5:14 PM

Outside Updates Report

Setup Type	Setup Name	ID	Pack Size	Description	Min On Hand	Max On Hand	Min Pur Qty	List
Site	1	00980000763	1	TIC TAC BIG PK SNGLS ORAN	0	0	12	1.59
Site	1	00980000767	1	TIC TAC BIG PK SNGLS WINT	0	0	12	1.59
Site	1	0098001230	1		0	0	0	0
Site	1	00980080005	1	NUTELLA & GO	0	0	12	2.09
Site	1	0098008950	1		0	0	0	0
Site	1	01000016045	1	FV CAPPUC 2#	0	0	0	0
Site	1	01000084046	1	NE K BB 42/2oz	0	0	0	0
Site	1	01000096046	1	NE K Col 42/2oz	0	0	0	0
Site	1	01000120046	1	SF CRML SYR750ML	0	0	0	0
Site	1	01000123046	1	SF FV SYRUP 750ML	0	0	0	0
Site	1	01000124046	1	RASPBERRY SYRUP 750 ML	0	0	0	0
Site	1	01000125046	1	HAZELNUT SYRUP 750 ML	0	0	0	0
Site	1	01000130046	1	CARAMEL SYRUP 750 ML	0	0	0	0
Site	1	01000134046	1	AMARETO SYP750ML	0	0	0	0
Site	1	01000178046	1	1/2 &1/2 LIQ 4 LT	0	0	0	0
Site	1	01000187046	1	NE FR RST 24/2.5oz	0	0	0	0
Site	1	01000287046	1	WH CHOC CAR CAP 2#	0	0	0	0
Site	1	01000327046	1	CHOC MILANO SYRUP 750 ML	0	0	0	0
Site	1	01000344046	1	ENGLISH TOFFEE SYP 750ml	0	0	0	0
Site	1	01000357046	1	1/2 & 1/2 2/ 5L	0	0	0	0
Site	1	01000380043	1	CO/2 20#	0	0	0	0
Site	1	01000824046	1	NE SOLO LID	0	0	0	0
Site	1	01000825046	1	NE SOLO FOAM 24	0	0	0	0
Site	1	01000826046	1	NE SOLO FOAM 20	0	0	0	0
Site	1	01000827046	1	NE SOLO FOAM 16	0	0	0	0
Site	1	01000828046	1	NE SOLO FOAM 12	0	0	0	0
Site	1	01000835046	1	BUNN TEA FILTER	0	0	0	0

Tip **Print controls you can use with this report are described in “Print Controls” on page A2-1.**

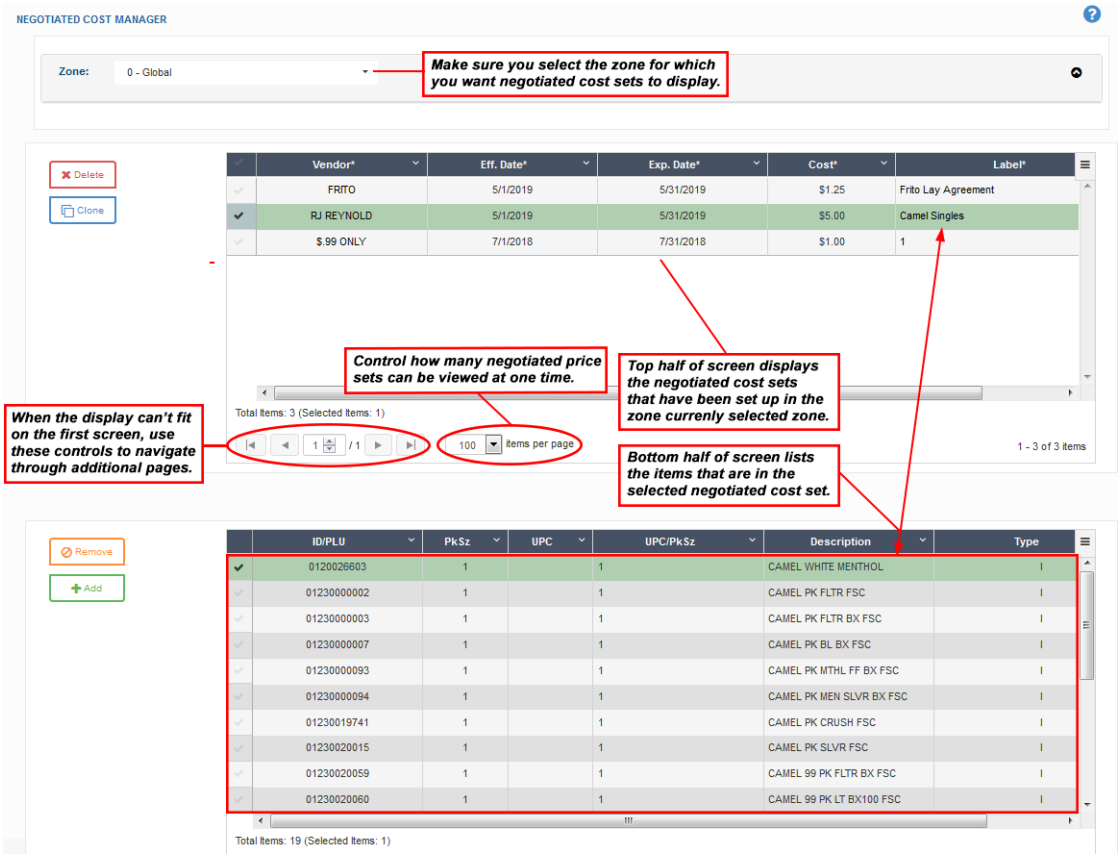
Negotiated Cost Manager

Overview

When you set negotiated costs on items for a vendor in the Item Adjust window (see “Negotiated Cost” on page 4-13), CPB organizes those items into a negotiated cost “set”. These sets display here, in the Negotiated Cost Manager feature.

To display the Negotiated Cost Manager, on the **Adjust** menu, click **Negotiated Cost Manager**. The following screen appears:

Negotiated Cost Manager



The first thing you should do in this screen is select, from the combo box in the upper left hand corner, the zone for which you wish to display negotiated cost sets.

As shown above, the Negotiated Cost Manager screen is divided into two sections. The top section displays a list of the negotiated cost sets (created in CPB's Item Adjustment screen) for the selected zone. When a set is selected (highlighted in green), the bottom half of the screen shows the items within the set.

To delete a set, highlight it and click Delete (a).

To clone a set, click Clone (b) and read about it in "Clone" on page 4-29.

Headings

Each negotiated cost set record in the top part of the screen displays five different kinds of related information, organized into columns. This information gives the set its unique identity and you can use it subsequently to reference the set (think of these five pieces of information collectively as the set's "label"):

	Vendor*	Eff. Date*	Exp. Date*	Cost*	Label*
	FRITO	5/1/2019	5/31/2019	$1.25	Frito Lay Agreement
✔	RJ REYNOLD	5/1/2019	5/31/2019	$5.00	Camel Singles

The key information includes:

- **Vendor** — The vendor with whom you set up the negotiated cost agreement.
- **Eff. Date** — When the agreed upon cost goes into effect.

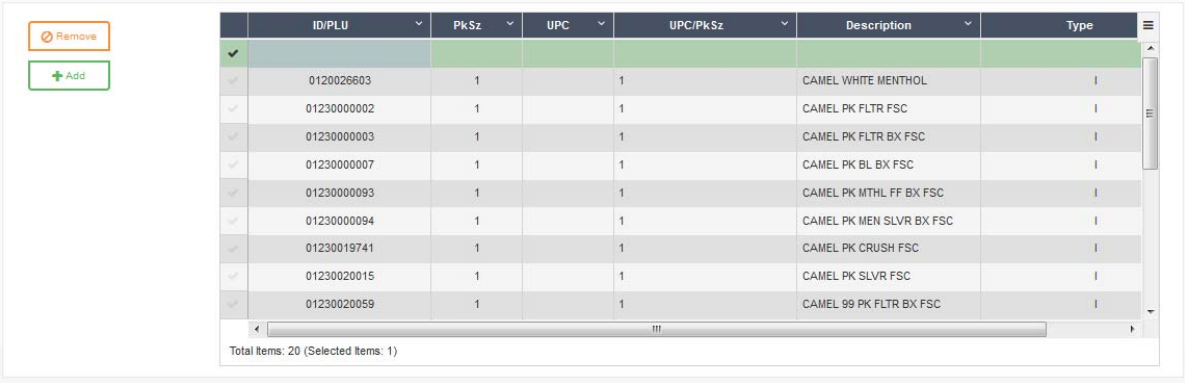
- **Exp. Date** — When the agreed upon cost expires.
- **Cost** — The negotiated cost for the set.
- **Label** — A user-defined name for the set to help make it easily identifiable.

Negotiated cost set records accept in-line editing. Click on the piece of information you want to change and begin typing your changes.

Items in the Negotiated Cost Set

When you highlight a a negotiated set in the top part of the Negotiated Cost Manager, the bottom part of the screen displays the items that are part of it:

Negotiated Cost Manager



Unlike the item set records themselves, you cannot edit the records contained within the set. However, there are several actions you can take:

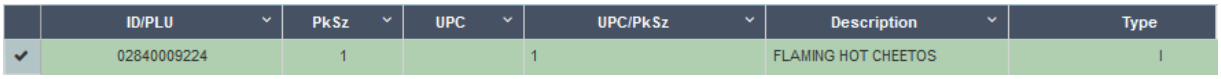
Remove — To remove a *single* negotiated cost item from a set, highlight the item you wish to remove and click this button.

Add — To add an existing item to the negotiated cost set, read "Adding an Item to a Negotiated Cost Set" on page 4-54.

Adding an Item to a Negotiated Cost Set

1. Highlight the set in the top part of the window and click Add. An empty line appears at the bottom of the item list in preparation for your entry:

2. Using in-line editing, type the **ID/PLU** of the item and the Pack Size (**PKSz**) and press **Tab**. If CPB recognizes this information, it will fill in the **UPC**, **UPC PKSZ**, **Description**, and **Type** boxes for you:



Important Negotiated Cost Manager does not allow you to add new items to the digital price book. You can only add exiting items to a negotiated cost set.

Clone

If you want to create a negotiated cost set based off of an existing set to reduce the time and effort it takes to create one the new set (like, reducing the quantity of items to add and remove). Formally, we call the original set a ***template*** for the new one.

1. Highlight an existing Negotiated Cost set and click [Clone]. The following window appears):

Set Negotiated Cost

2. Work through this window as follows:

   Template — Use this combo box to call up an existing template (a Negotiated Cost set) consisting of the information recorded that you want to clone. Each negotiated cost template is defined by and marked by the system as *Cost* | *Vendor* | *Effective Date* | *Expiration Date* | *Label* (see above illustration). Once you select a negotiated cost template from this combo box, the information related to it populates the rest of the window. However, as soon as you change one or more of these pieces of information, you are creating a new unique template for the cloned set that takes effect when you click **OK**.

   Label — Record an easily-identifiable label to help you identify the cloned set.

   Set Amount — Record the negotiated cost value of the cloned set here. Use 2-place decimal format.

   Vendor — Select the vendor for whom the cost is being negotiated using this combo box.

   Effective Date — Record the date the cloned negotiated cost goes into effect *and* when it expires, by using the calendar display button (see "Calendar Display" on page A2-2). Click **Apply** when you are finished.

   [Preview] — Click here to display the Negotiated Cost Preview report and from there, print it, if you so desire.

   [OK] — When you finish working in this window, click this button and the cloned Negotiated Cost set will appear in the top half of the screen.

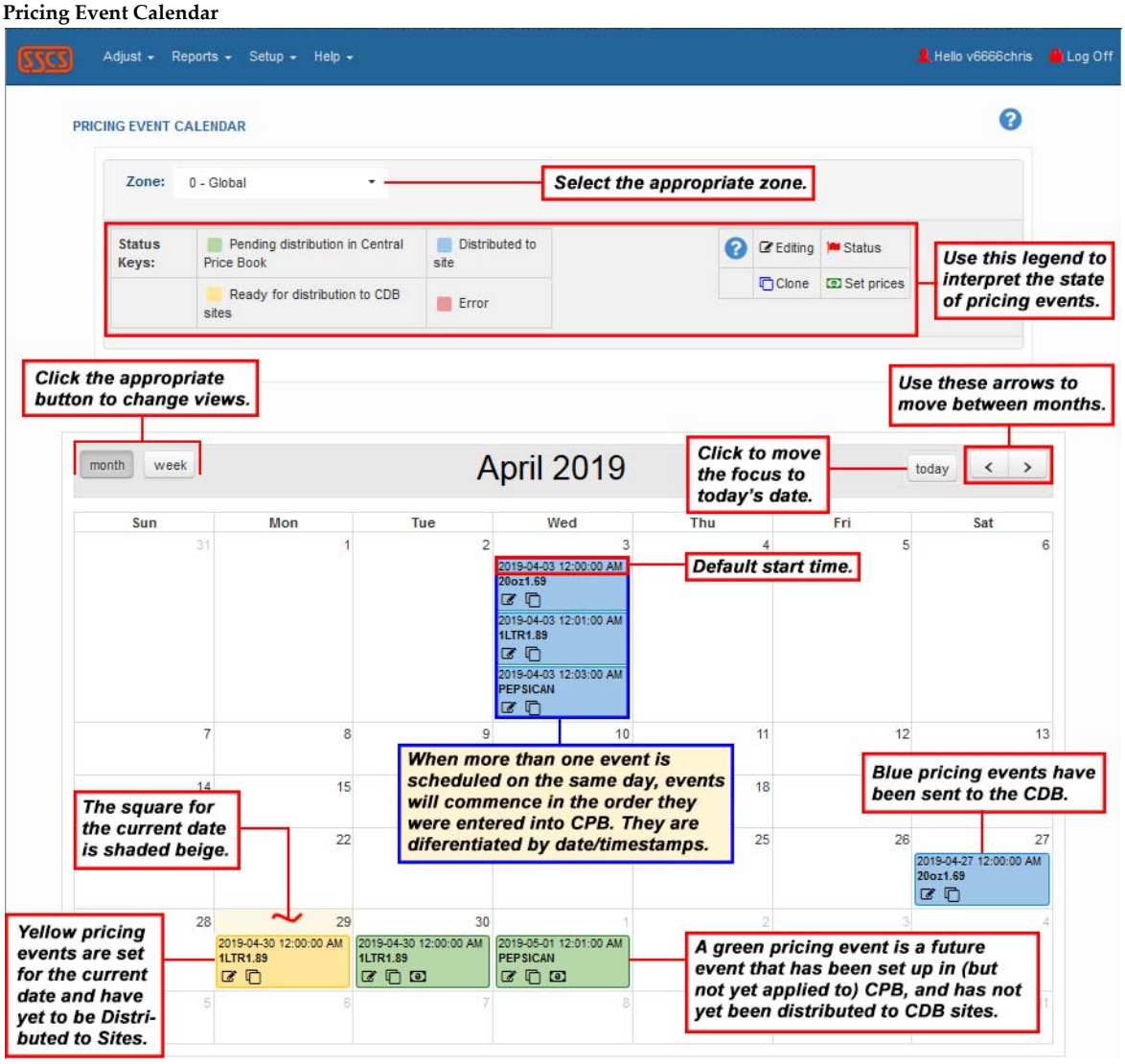
Pricing Event Calendar

The Pricing Event Calendar is a graphic display that allows you to see the status of the Future Pricing Events and edit selected information within them, depending upon the event's status.

Important **While you can access scheduled future pricing events here, you have to add new ones using the Clone Pricing Event feature which you can find in "Editing Pricing Events" on page 4-57.**

To access the calendar, in CPB, on the **Adjust** menu, click **Pricing Event Calendar**:

Pricing Event Calendar



Each visible square in the main body of this calendar represents a pricing event. They are color-coded and contain small icons that explain pricing event status and the actions that are available to you. Two grids at the top of this screen explain which each means, which we cover in the next two sections.

When a pricing event is added to the calender, it is time stamped with **12 AM**, the default start time. If you are launching more than one promotion on the same day, CPB will sort

the promotions in the order in which you entered them and will apply a system generated time stamp (12:01, 12:02, 12:03...) to ensure they deploy in that order.

Important **Future Pricing Events are set up in the Item Adjust Menu, and you can read all about creating them in "Adding a New Pricing Event" on page 4-10.**

Status Color Key

Status Keys:	Pending distribution in Central Price Book	Distributed to site
	Ready for distribution to CDB sites	Error

The leftmost grid at the top of the screen provides a color key relating to the status of pricing events in the main part of the calendar:

Pending Distribution in Central Price Book — A pricing event displays green when it has been set up, but not yet Distributed to Sites. Remember, you are responsible for manually initiating Distribute to Sites the day the Future Pricing Event is to take place. Therefore a green event is as good as synonymous with an event that has not yet taken place.

Tip **The Computerized Daily Book allows you to schedule automatically a Distribute to Sites event that initiates on a regular basis without manual intervention. For more information on scheduled tasks, consult the "Scheduled Tasks" section in the CDB User's Guide.**

Ready for Distribution to CDB Sites— On the day of a pricing event, the scheduled event turns yellow. This is a signal that you must perform a Distribute to Sites event, so that the prices in the event can take effect in the CDB. If a calendar event remains yellow past the day of its scheduled start, you should Distribute to Sites as soon as possible.

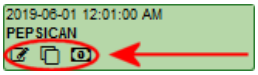
Distributed to Site —A blue pricing event is an event that already has been Distributed to Sites and may currently be in use, depending upon whether you have terminated it not (see "Terminating the Effect of a Future Pricing Event" on page 4-61).

Error —A red pricing event denotes an error has occurred in the Future Pricing process. Please contact SSCS Technical Support at your earliest convenience to resolve the issue.

Editing Pricing Events

Editing	Error
Clone	Set prices

The rightmost grid at the top of the screen provides an icon key representing the actions that can be taken within each pricing event. These editing actions are initiated by clicking the corresponding icon in the square representing the day of the event, shown below:



Important **The editing and cloning actions are available for all event types. Set prices is available only for items pending distribution in Central Price Book (the green squares).**

Here's what each icon means:

Editing

Click this icon to open up the following window which provides editing privileges:

Pricing Events Calendar — Editing

Each item in the list starts with a column displaying the status of the item, which should match the color of the pricing event square you selected to get here. You'll also notice the top of the screen contains two boxes, **Pricing Event** which shows the label of the event, and the pricing event's **Effective Date**.

Yellow and Blue Events

- Clicking on the edit icon in these type of events allows access to a display-only view of the contents of the pricing event. You can't edit or delete these records these kinds of records, including the selection of individual events for individual event. They are for review only.

Green Events

Several types of action are allowed on pending event:

- Change the event's **Pricing Event** label.
- Change the event's **Effective Date**.
- Click ( ) to delete the entire pricing event. You will be prompted to confirm the deletion. Click **Yes** to set up the deletion.
- Highlight a desired item or items and click ( ) to remove them from the event. You will be prompted to confirm the deletion. You will be prompted to confirm the deletion. Click **Yes** to set up the deletion.

Finishing Up

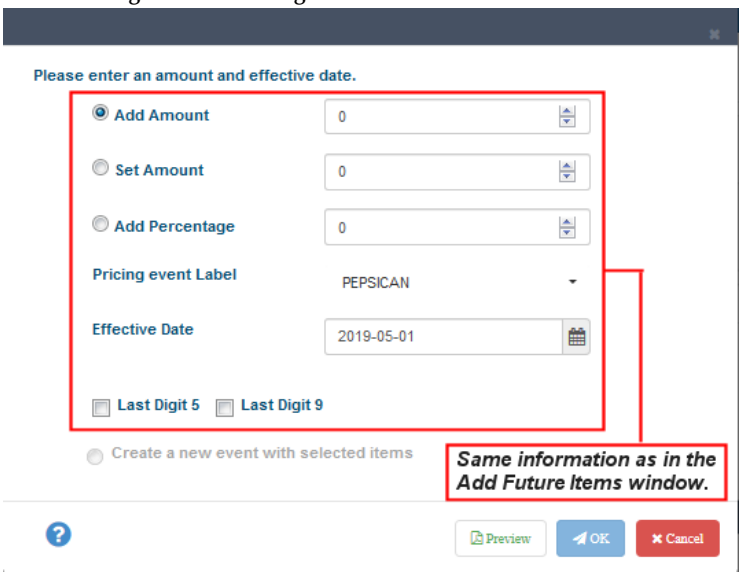
When you are all finished working in the screen as described above, click ( ) at the top of the screen to submit your changes. You will be returned to the pricing events calendar.

Clone

Click this icon in the calendar square of your choice to call up a window that allows you to create a new future pricing event based upon the information in the event you selected.

A window displays that looks much like the one you see when you add a future pricing event through the Item Adjust menu (the features of which are explained in "Adding a New Pricing Event" on page 4-10):

Future Pricing — Clone Pricing Event



To work through this window:

1. Edit the item's price using the features at the top of this window, which is a partial set of the Add Future Price Window (see "Adding a New Pricing Event" on page 4-10).
2. Select a new **Pricing Event Label** and **Effective Date** for the cloned event.
3. Select an effective date for the cloned event by typing the date in *yyyy/mm/dd* format in the **Effective Date** combo box or by using the calendar display button (see "Calendar Display" on page A2-2).
4. Select the **Create a new event with the selected items** option button if you want to create a new event with the items contained within the selected event you select.
5. Click **Preview** to review your pricing changes or click **OK** to accept them.
6. Review the event as desired on the Pricing Event calendar, where you can edit the timing of events that have not yet occurred (see "Pricing Event Calendar" on page 4-56).
7. When you are sure that the event is set as you desire, click **OK**. The cloned pricing event will initiate when you perform Distribute to Sites on the effective date.

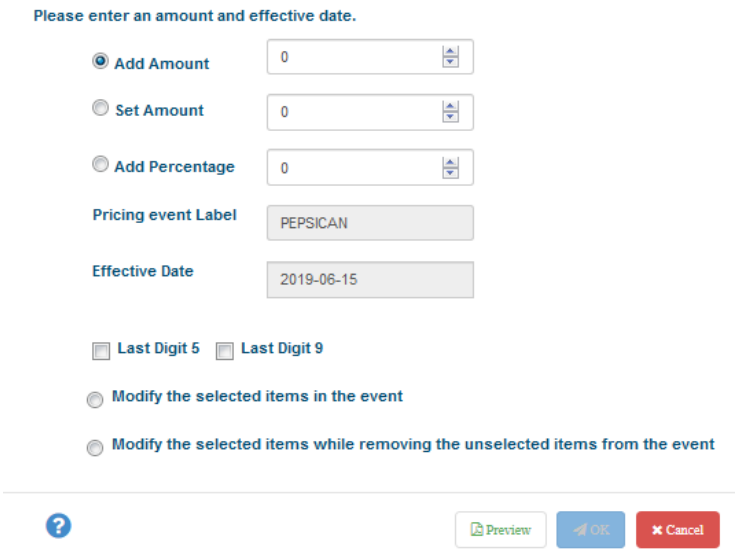
Error

Displays in the square of a calendar event when Central Price Book has encountered something it doesn't like and has thrown an error as a result. Please contact SSCS Technical Support at your earliest convenience to resolve the issue.

Set Prices

*Not available on events that have already been initiated (**green** and **yellow**).* Click this icon to display a window that allows you to make edits to a future event's pricing information. These changes will be incorporated into the pricing event on the date it initiates.

Future Pricing – Set Prices



The Set Price allows you to record the following:

Add Amount — If you wish to add or reduce the unit list price of the items in the pricing event by a money value, select the option button next to this selection and type the desired amount in two-place decimal format in the box provided. For example, **0.10** would add ten cents to the unit list price of the selected items and **-0.10** would subtract ten cents.

Set Amount — If you wish to set a specific dollar amount as the list price for the items in the pricing event, that is, overwrite the current amount, select this option button. You must type the money value figure in the box. You can set this value to a negative amount.

Add Percentage —If you wish to adjust the list price by a percentage, select this option button and type the adjustment percentage in the provided box. For example, if you type in **50**, a $1.50 item will have a new price of $2.25 [1.50 + (1.50 x .50) = 2.25]. Do not use the percent sign (%). You can enter a negative amount (for example, **-10**), if desired.

Pricing Event Label —This non-editable field displays the label of the pricing event for reference.

Effective Date — This non-editable field displays the label of the pricing event for reference.

Last Digit 5 ? — Select this check box to round the last digit for event's prices to a 5. If this box alone is selected, CPB always rounds up to the next 5 ($4.90 becomes **$4.95**, $4.96 becomes **$5.05**, etc.).

Last Digit 9 ? — Select this check box to round the last digit for the event's prices to a 9. If this box alone is selected, CPB always rounds up to the next 9 ($4.91 becomes **$4.99**, $5.44 becomes **$5.49**, etc.)—*with one exception:* the system will round *down* to 9 if the last digit is a 0 (zero), for example, $5.10 to **$5.09**.

Last Digit 5 ?/Last Digit 9 ? — If both check boxes are selected, CPB will round up to 5 or 9, depending on the next value upward (1–4 would be rounded to **5**; 6–8 would be rounded to **9;** the system will round *down* to 9 if the last digit is 0).

Work through the Set Prices window as follows:

1. Edit the pricing information using the features described immediately above.
2. If desired, review the Pricing Event Label and Effective Date (non-editable).
3. Click the **Modify the selected items in the event** option box if you want to make the changes to all the items in the pricing event you selected to edit *-or-*

   Click the **Modify the selected items while removing the unselected items from the event** when you want to make changes to the selected items in the pricing event *and, in addition, delete all items from the event that were not modified*.
4. Click **Preview** to review your price changes or click **OK** to accept them.
5. Review the event as desired on the Pricing Event calendar, where you can edit the timing of events that have not yet occurred (see "Pricing Event Calendar" on page 4-56).
6. When you are sure that the event is set as you desire, the pricing event is ready to initiate when you perform Distribute to Sites on the effective date.
7. Initiate Distribute to Sites. The Pricing Event will then be able to initiate on the effective date.

Terminating the Effect of a Future Pricing Event

Future pricing events are initiated with an Effective Date but remain open events because there is no parallel procedure to terminate the event.

If you wish to terminate the effect of a future pricing event, follow this short procedure:

1. Click the Clone icon ( ) of the event whose effect you wish to terminate.
2. When the window displays, use the features to change the price to the desired post-event price.
3. If you wish to re-name the event, do so using the **Pricing Event Label** combo box.
4. Select an **Effective Date** for the event.
5. Click **OK**. When you are sure that the event is set as you desire. The the effect of the original future pricing event will be terminated on the effective date.

Reports

Reports Menu

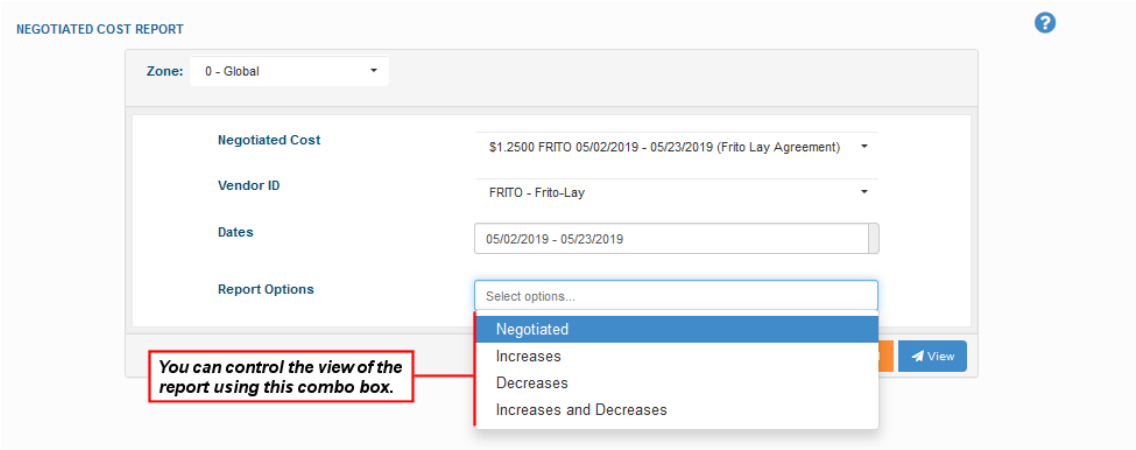
This menu provides access to the Negotiated Cost report. To access a report, on the **Reports** menu, click the name of the report you wish to view or print and it will appear in its own window in "view mode" from where you may print it.

Negotiated Cost

This report provides a list of negotiated costs as recorded through the Set Negotiated Cost feature of Item Adjustment (see "Negotiated Cost" on page 4-13). It compares negotiated costs against the values that appear on purchase transactions recorded in the CDB sites on a by invoice basis. The report is useful as documentation when addressing cost discrepancies with vendors.

To display the report, begin by clicking **Negotiated Cost** on the **Reports** menu. You can then filter its contents using the following window:

Negotiated Cost Filter



Zone — Select the zone for which you will be comparing invoices.

Negotiated Cost — Allows you to select any negotiated cost set currently available through CPB. When you make this selection, the **Vendor ID** and **Dates** boxes populate with information from the negotiated cost set.

Vendor ID — The vendor on whom you wish to analyze negotiated costs. If you want to run a report for all vendors sorted by Vendor ID, leave this box blank.

Dates — The beginning and ending dates for the invoices to be compared in the negotiated cost set. These can be edited with the system's calendar tool as described in "Calendar Display" on page A2-2.

Report Options — Select from the following:

> **Negotiated** — Shows the negotiated costs for the vendor without comparing the costs on the invoice.
>
> **Increases** — Shows what costs on the invoice increased in comparison to the vendor's negotiated costs on the invoice.

Decreases — Shows what costs on the invoice decreased in comparison to the vendor's negotiated costs on the invoice.

Increases and Decreases — Shows costs on the invoice that have increased *and* decreased in comparison to the vendor's negotiated costs on the invoice. *This is the default view.*

E-mail View — Using this pair of buttons, you can email the Negotiated Cost report or view it:

Negotiated Cost Report

SSCS, Inc 0 - Global

Service Station Computer Systems, Inc.
Central Price Book
Copyright © 1984-2021

Date: Apr 04, 2022
Name: v6666chris
Time: 3:07 PM

User assigns label when negotiated cost is created.

Negotiated Cost Report

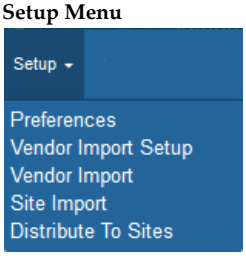
Vendor	Label	Negotiated Date	Pack Size	ID	Description	Difference	Actual	Negotiated	Qty
PEPSI	Pepsi Buydown	04/01/2022 - 04/30/2022	1	01200000121	DT PEPSI CF NR 20 OZ	0.03	1.2900	1.2600	1
PEPSI	Pepsi Buydown	04/01/2022 - 04/30/2022	1	01200000129	PEPSI 20 OZ	0.03	1.2900	1.2600	1
PEPSI	Pepsi Buydown	04/01/2022 - 04/30/2022	1	01200000130	DIET PEPSI 20 OZ	0.03	1.2900	1.2600	1
PEPSI	Pepsi Buydown	04/01/2022 - 04/30/2022	1	01200000131	MT DEW 20 OZ	0.03	1.2900	1.2600	1
PEPSI	Pepsi Buydown	04/01/2022 - 04/30/2022	1	01200000132	PEPSI DIET	0.03	1.2900	1.2600	1
PEPSI	Pepsi Buydown	04/01/2022 - 04/30/2022	1	01200000134	MT DEW DIET 20 OZ CDBWIN	0.03	1.2900	1.2600	1
					Invoice Difference	$0.18			

This figure takes the difference between Actual and Negotiated Cost and multiplies it by Qty.

Tip Print controls you can use with this report are described in "Print Controls" on page A2-1.

Setup Menu

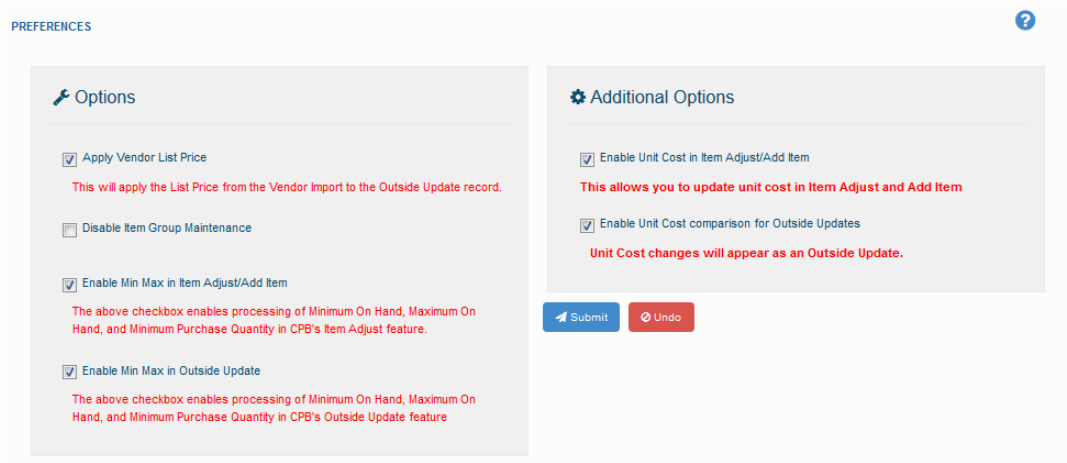
Setup Menu



Preferences

The Preferences feature lets you control certain behaviors of Central Price Book. To display the feature, on the **Setup** menu, click **Preferences**:

Preferences



There are two sides to the screen, **Options** and **Additional Options**.

Options

Apply Vendor List Price

Check box cleared — With the check box cleared, changes in vendor list prices are ignored when you import the vendor file (see "Vendor Import" on page 6-5). This is the default behavior.

Check box selected — When you select this check box, changed list prices in the vendor import file will be accepted into CPB. Changed list prices will be identified in the Outside Updates window for review and processing. When you select this check box, the following message appears:

This will apply the List Price from the Vendor Import to the Outside Update record.

Disable Item Group Maintenance

Check box cleared — With the check box cleared, you can add, edit and remove the content of Item Groups using the Item Group function of the Item Adjustment window (see "Item Group" on page 4-17) and the Add Item window (see "Add Item" on page 4-26).

Check box selected — By selecting this check box, you disable the ability to add and remove the content of Item Groups throughout Central Price Book. The Item Group button in Item Adjustment becomes grayed out and non-functional. Working with Item Groups in the Add Item feature is likewise disallowed. When you select the check box, the following message appears onscreen:

Warning: CPB will no longer alter Item groups. It will use Item Groups found in CDBWin exclusively. You will have to perform all Item Group Maintenance in CDBWin.

Enable Min Max in Item Adjust

Check box cleared — With the check box cleared, you cannot set or otherwise manage from CPB's Item Adjust feature the following attributes of an item: **Minimum on Hand**, **Maximum on Hand**, and **Minimum Purchase Quantities**. The Min/Max button in Item Adjustment becomes grayed out and non-functional. Your ability to edit these attributes are completely handled by the CDB's Item Adjust feature.

Check box selected — By selecting this check box, you enable your ability to add and remove an item's **Minimum on Hand**, **Maximum on Hand**, and **Minimum Purchase Quantities** in the Central Price Book's Item Adjustment and Add Item windows. When you select the check box, the following message appears onscreen:

The above checkbox enables processing of Minimum On Hand, Maximum On Hand, and Minimum Purchase Quantity in CPB's Item Adjust feature.

*Selecting this check box reveals the **Enable Min Max in Outside Update** check box, described next.*

Enable Min Max in Outside Update

*This check box only displays if the **Enable Min Max in Item Adjust** check box is selected.*

Check box cleared — With a cleared check box, you cannot set or otherwise manage from CPB's Outside Updates feature the following attributes of an item: **Minimum on Hand**, **Maximum on Hand**, and **Minimum Purchase Quantities**. The columns devoted to handling these values will not appear in the Outside Updates window.

Check box selected — By selecting this check box, you enable your ability to add and remove an item's **Minimum on Hand**, **Maximum on Hand**, and **Minimum Purchase Quantities** in the Central Price Book's Outside Updates window through in-line editing in columns devoted to each of the three values. When you select the check box, the following message appears onscreen:

The above checkbox enables processing of Minimum On Hand, Maximum On Hand, and Minimum Purchase Quantity in CPB's Outside Update feature.

Additional Options

Enable Unit Cost in Item Adjust/Add Item

Check box cleared — With a cleared check box, you cannot edit Unit Cost values on existing items anywhere in the Central Price Book. This means you cannot edit the **Cost** column in the Item Adjustment window or the **Unit Cost** box in the Add Item window for *existing* items.

Check box selected — By selecting this check box, you enable your ability to edit Unit Cost values in Central Price Book's Item Adjustment **Cost** column, as well as the **Unit Cost** box in the Add Item window on *existing* items. Unit Costs edited in Central Price Book will be sent to the Computerized Daily Book during a Distribute to Sites event and updated on the item there, although they will not affect the Average Cost for the item.

Enable Unit Cost comparison for Outside Updates

Check box cleared — You will not see items that have had their cost changed in the CDB when you go into the Outside Updates screen.

Check Box selected — Any items that have had their cost changed in the CDB will appear when Outside Updates is run.

Submit Undo — Whatever Settings options you select, they will not get committed to the price book until you click **Submit**. If you have second thoughts about what changes and additions you have staged to affect the price book, you can click **Undo** to rest to the default selections.

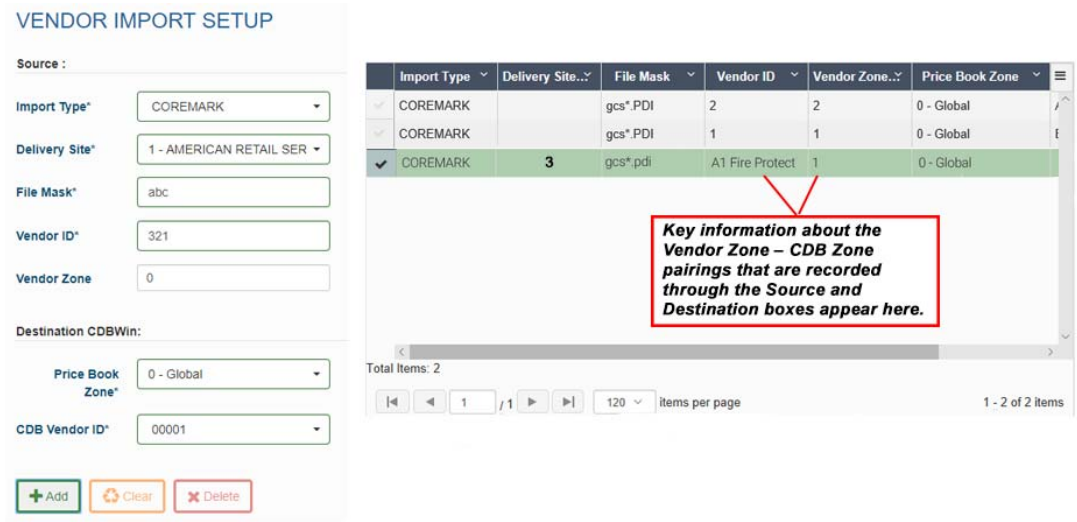
Vendor Import Setup

Important **Vendor Import Setup references Vendor IDs in the CDB, so before you use the feature make sure you set up your vendor records there.**

The Vendor Import Setup window is where you prepare CPB to receive electronic pricing cost updates from vendors. A variety of vendor file formats are supported.

Vendor Import Setup allows you to specify a vendor-defined zone within the pricing file from which updates will be received, as well as a CDB zone to which the changes will be pushed once they are accepted. It is this "matching up" of a vendor zone in the price file to a specific CDB zone that allows updates to transfer seamlessly from the vendor's pricing file to the CDB. In this way Vendor Import Setup can be seen as a connector for two halves of a pipeline through which pricing changes flow. Vendor pricing updates are accepted in Outside Updates and pushed to CDB zones and sites using CPB's Distribute to Sites feature.

Vendor Import Setup



Once you have set up the information in this window, initiate the updating of information by clicking **Vendor Import** on the **Setup** menu (see "Vendor Import" on page 6-5). Pricing information will be imported for each source/destination relationship you establish (relationships display in the list on the center right part of the screen).

Work through the Vendor Import Setup window as follows:

Source — The features in this group box contain information that prepare CPB to receive the imported vendor file (the "source" in question).

Import Type — Select the format of the vendor file to be imported using the list box (which contains all the formats CPB accepts). The list of accepted vendors and vendor file formats are:

Vendor	Format
AJ Silberman and Co.	PDI 7500[a]
Amcon	PDI 7500
Chambers and Owen	PDI 7500
Core-Mark	PDI 7500
J. Polep	PDI 7500
Liberty USA	PDI 7500
McLane	NAXML ItemSynch/ItemPrice

a. the PDI/Enterprise version of the PDI 7500 series file format isn't supported.

File Location — Like EDI files, vendor files are delivered to your system's EDI folder to a specific site sub-directory that CPB accesses. Using this combo box, select the site folder to which you wish to have vendor files delivered.

File Mask — Imported vendor files are placed within a directory that CPB accesses for pricing information, however, during the process of importing you may encounter more than one type of file and CPB's default behavior is to place all file types in that folder. If you want to limit imported files to a specific type, type a file mask here such as ***.xml**, which would return only XML files. Use of a second wildcard character will result in the program looking for any value after the second wildcard character. This means the characters ***SSCS*.txt** would allow CPB to process a file with any extension even though **.txt** is specified.

Label — Type an alphanumeric ID that can used to identify the specific setup, as you can have more than one.

Vendor Zone — Type the alphanumeric characters identifying the vendor file to be imported. You need to obtain this information from the vendor. One zone may represent an entire vendor's pricing file, but it can also represent part of a vendor pricing file that is divided into multiple parts.

Destination CDBWin —Use the features in this group box to define the target destination in the CDB for the vendor's pricing information. Changes and additions in the vendor's pricing file are pushed to this destination once they are accepted in the Outside Updates window and a Distribute to Sites event occurs.

Price Book Zone — Type the CDB zone into which the vendor information will be imported. Start typing and you will be presented with a list of zones as set up in the CDB.

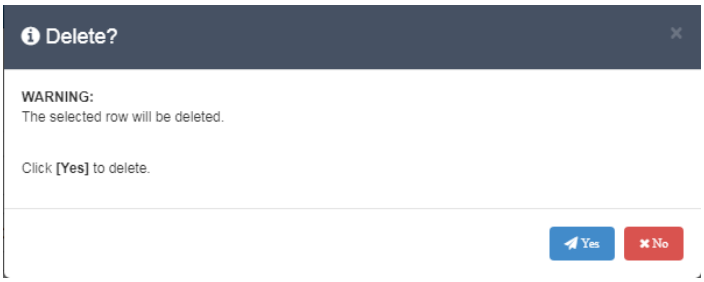
Vendor ID — Type the name of the vendor as it appears in the CDB. This ID is used throughout CPB when a vendor is identified, for example, in the Outside Updates window.

Tip **If you add a new vendor to the CDB, it will not display here until, on the Setup menu, you click Site Import > Refresh Setups.**

— Once you have set up a new source/destination relationship, click this button to add it. An informational entry that functions as a "label" for the source/destination pairing appears in the screen's continuous list. From this point on, CPB will look for updates from this source and file mask type.

— Click this button to clear the entry in the boxes in the **Source** and **Destination CDBWin** group boxes. You will be prompted to save or discard the information before it is cleared.

— To delete a source/destination relationship and stop the flow of its imported updates, highlight the record and click this button. The following prompt appears:



Click **Yes** to confirm you wish to delete the record. Click **No** to cancel the deletion.

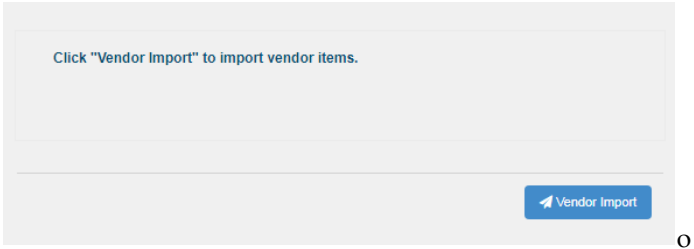
Vendor Import

Once you have set up vendor information in the Vendor Import Setup screen, use Vendor Import to import the latest changes from the vendor's price file to Central Price Book in preparation for pushing changes and additions out to the CDB zones.

To perform a vendor import:

1. On the **Setup** menu, click **Vendor Import**. The following prompt appears:

Vendor Import Prompt



o

2. Click **Vendor Import**. CPB will begin importing the items while an activity bar displays on screen. When Vendor Import is complete, you are taken to the Outside Updates window to review pending changes contained in the vendor file in preparation for accepting them and distributing them to sites. To read about the Outside Updates feature, see "Outside Updates" on page 4-41.

Important **The default behavior of the CDB is to ignore list prices that are imported from the Vendor Import file. If you do want to use the list prices that are in the Vendor Import file, make sure that the Apply Vendor List Price check box is selected (see "Preferences" on page 6-1).**

Site Import

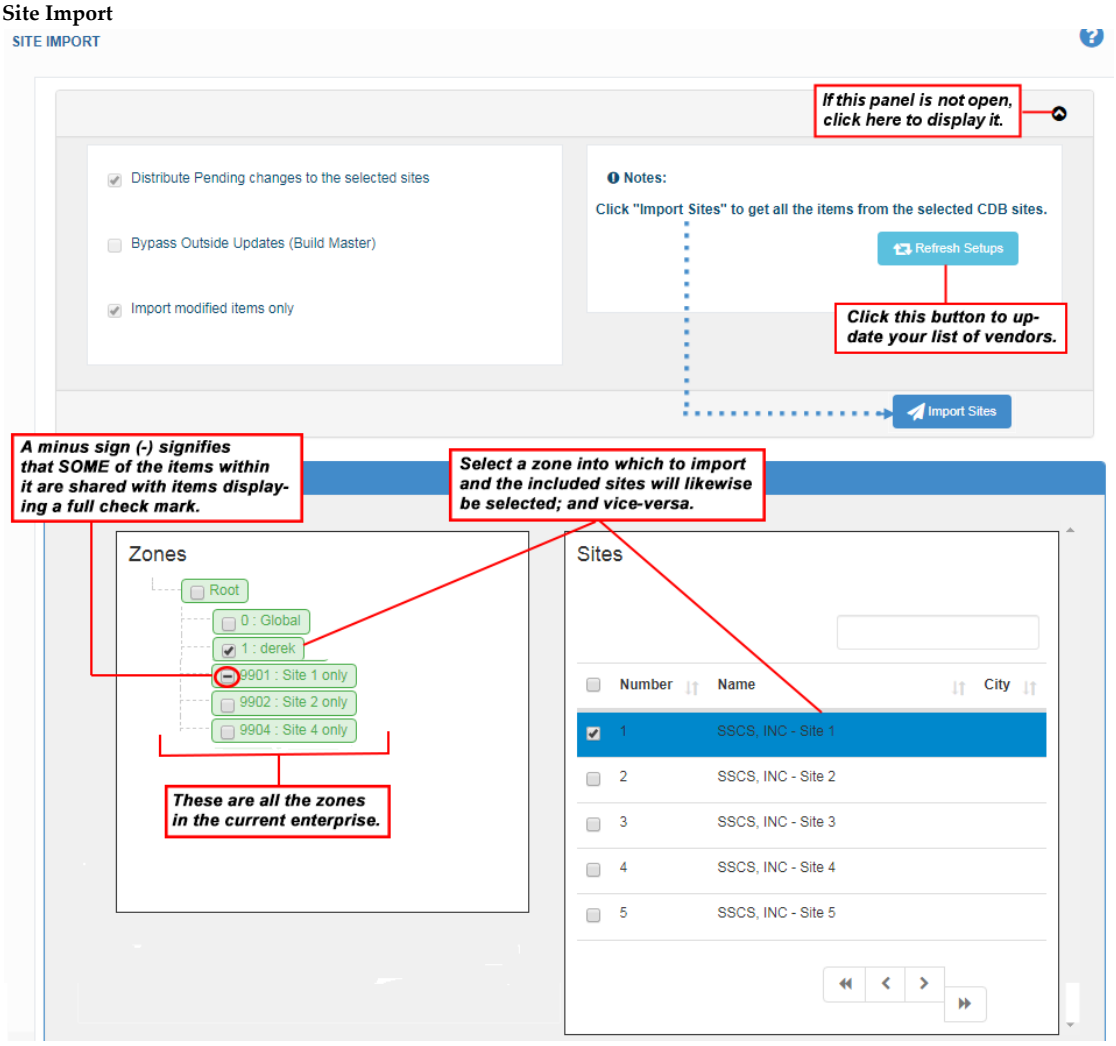
Changes that users make to pricing information in a CDB site or sites must be imported into the CDB as managed by CPB so they can be pushed back out to other sites and zones where appropriate. Changes to CDB are initiated through Direct Store Deliveries, EDI and manual entries, pricing information that includes item description, receipt description, department, cost, unit list, tax group and redemption.

To get the changes to CPB in preparation for accepting them in the Outside Updates window and distributing them to sites, use the Site Import function.

To perform a Site Import:

1. On the **Setup** menu, click **Site Import**. The following window appears:

Site Import



This window provides a graphic representation of all zones and sites that are in the enterprise. Each zone in the current enterprise is listed on the left, numbered corre-

sponding to its Zone #. The sites in the enterprise are listed on the right. They all are potential targets for the import event you are about to initiate.

2. Select the check boxes of the targets to which you wish to send the imported items. Click a zone and all sites within the zone will be selected. Select a site and the zone in which that site resides will also be selected. Sites that share only some of the items in the zone/site you selected appear with a minus sign (-).

   You can select as many zones/sites as you want. Changes and additions will appear in the Outside Updates window after the Site Import event completes.

Tip **In both the zone and site selection grids, you can select the topmost check box to select every target below it.**

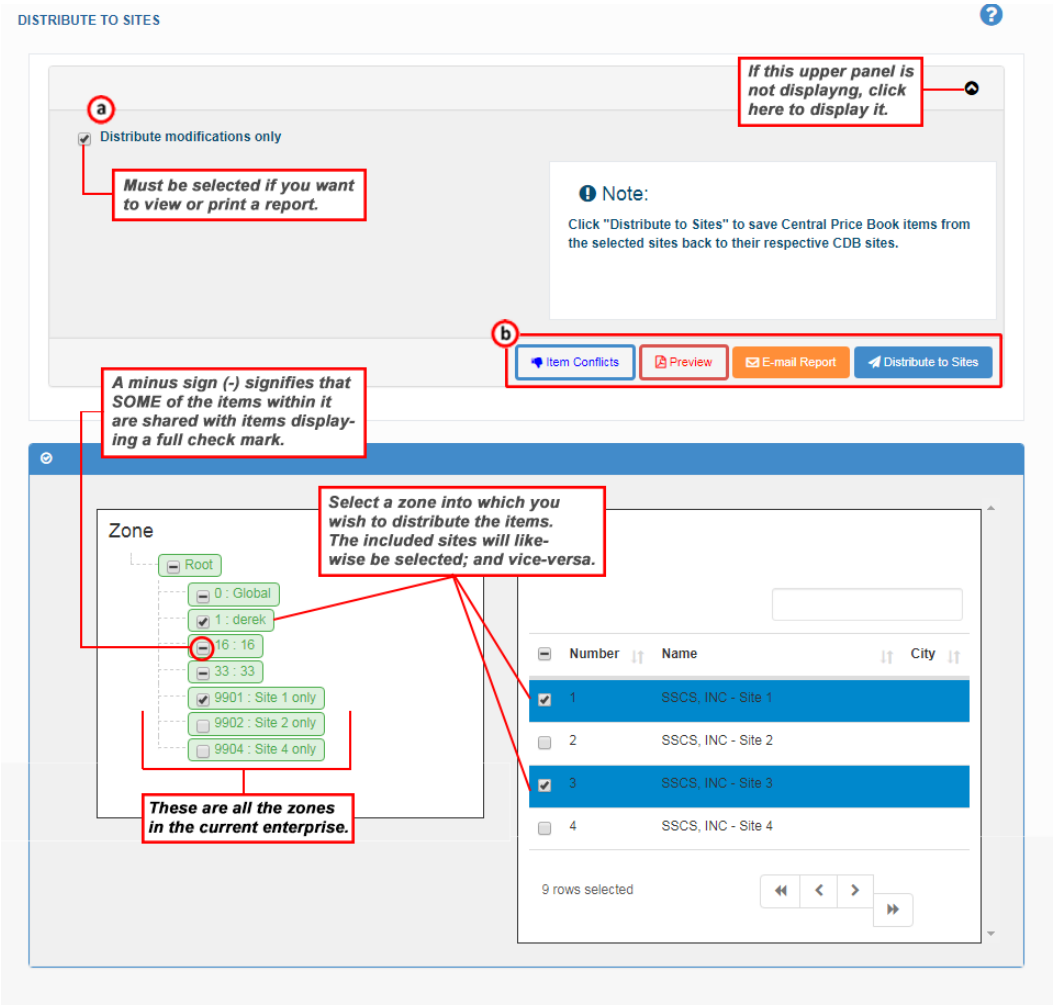
3. Once you select your target zones/sites, the **Import Sites** button becomes enabled. With your targets selected, you have the following options:
   - *Select* the **Distribute pending changes to the selected site** check box and *clear* the **Bypass Outside Updates (Build Master)** check box to ensure all pending outside updates will appear in the Outside Updates window after you import from sites. You can then accept them and Distribute to Sites.
   - *Clear* the **Distribute pending changes to the selected site** check box and *select* the **Bypass Outside Updates (Build Master)** check box to discard your outside updates and create a new price book without them.
   - *Select* the **Distribute pending changes to the selected site** check box and *select* the **Import modified items only** check box to ensure pending outside updates consisting only *of modified items* will appear in the Outside Updates window after you import from sites. You can then accept them and Distribute to Sites.
4. If you want to update your list of current vendors at any time, based on what has been entered into CPB, click Refresh Setups.
5. Click Import Sites. CPB will begin importing the items from the CDB sites. When Site Import is complete, you are taken to the Outside Updates window to review pending changes in preparation for accepting them and distributing them to sites. To read about the Outside Updates feature, see "Outside Updates" on page 4-41.

Distribute to Sites

Potential changes and additions to the digital price book come from a variety of sources, as described in "Building Your First Price Book" on page 1-10. Once you have designated the target CDB zone/sites where these changes and additions are to be pushed using the Outside Updates window, and have accepted them using the same window, you "push" them to the CDB by using the Distribute to Sites feature. To do this:

1. On the **Setup** menu, click **Distribute to Sites**. The following window appears:

Distribute to Sites



This window provides a graphic representation of all zones and sites that are in the enterprise. Each zone in the current enterprise is listed on the left, numbered corresponding to its Zone #. The sites in the enterprise are listed on the right. They all are potential targets for the Distribute to Sites event you are about to initiate.

2. Select the check boxes of the sites to which items are to be distributed. Click a zone and all sites within the zone will be selected. Select a site and the zone in which that site resides will also be selected. Sites that share only some of the items in the zone/site you selected appear with a minus sign (-).

   You can select as many zones/sites as you want.

Tip **In both the zone and site selection grids, you can select the topmost check box to select every target below it.**

3. Once you select the zones/sites to which items will be distributed, you can take the following actions using the provided check box (a) and the four buttons directly above the Sites list (b). Your options are as follows:
   - *Select* the **Distribute modifications only** check box if you want only item changes and additions that occurred in CPB distributed to the target zones/sites. This is the default setting. *If you are planning on running the **Distribute to Sites** report, this check box must be selected.*
   - *Clear* the **Distribute modifications only** check box to distribute the complete price book along with the item changes and additions to the target zones/sites. This is useful, for example, if your pricing in a zone or site has gotten behind, is plagued with potential errors and you want to re-set it. If the selected sites are numerous, the DTS process may take a long time. If you have changed Unit Cost on any items (see "Enable Unit Cost in Item Adjust/Add Item" on page 6-2), the window will notify you that these costs also will be overridden. *If this check box is cleared you CANNOT run a **Distribute to Sites** report.*
   - Item Conflicts — See "Item Conflicts Report" on page 6-10.
   - Preview — See "Distribute to Sites Report" on page 6-11.
   - E-mail Report — See "Email Report" on page 6-12.
4. When you are ready, click Distribute to Sites. CPB will begin pushing the changes to the appropriate CDB sites while an activity circle rolls while the processing takes place. When CPB finishes to sites, it displays the message, **Distribute to Sites complete**. Your changes are now resident in the CDB sites you selected. Items in the Outside Updates window that have been Distributed to Sites will no longer display there, unless there is an issue (see next section).

Item Conflicts Report

The Item Conflicts Report displays items in CPB where:

- The id and upc_code match, but the pack_size and upc_pack_size do not match.
- The id and upc_code do not match, but the pack_size and upc_pack_size do match

Important **CPB does not consider or report missing singles. CPB does not evaluate validity of barcodes. CPB allows non numeric ID values. Type / Account discrepancies are displayed with Divergent Values under Item Adjustment**

Central Price Book provides an Item Conflicts report that calls potential invalid items to your attention, giving you the opportunity to clean up discrepancies before you attempt to distribute them to your CDB sites. Click **Preview** and a report like the following displays. We've called out a couple of typical conflicts within it:

Item Conflicts Report

SSCS, Inc
Demo not for Shipping
SALINAS, CA 93901-5013

Service Station Computer Systems
Central Price Book
Copyright © 1984-2019

Date: Jun 12, 2019
Name: v99101davidr
Time: 12:01 PM

Item Conflicts

Site: 1 - QA - Site 1

ID	Pack Sz	UPC	UPC Sz	Description	Dept	Sub	Type	UnitCost	UnitList	ChangedBy	LastUpdate
STUFFDITTO	1	NOTDITTO	1	Packsizes are ditto (ID/UPC = NO)	6	70	I	8	8.88	v99101davidr	06/12/2019

The report is telling you that this ID and UPC are in conflict, as you can tell by the different spellings.

Site: 3 - QA - Site 3

ID	Pack Sz	UPC	UPC Sz	Description	Dept	Sub	Type	UnitCost	UnitList	ChangedBy	LastUpdate
STUFF	1	STUFF	2	Stuff 1 / Stuff 2	3	4	I	5	8.88	v99101davidr	06/12/2019
STUFF2	2	STUFF2	1	Stuff 2 / Stuff 1	2	2	I	2	8.88	v99101davidr	06/12/2019

Here the Pack Sz and the the UPC Sz are in conflict.

Distribute to Sites Report

Central Price Book provides a Distribute to Sites report that you can use to double-check what you have positioned to be ready for distribution to CDB sites. From Central Price Book, click Preview to view the following:

Distribute to Sites Report

SSCS, Inc -
Service Station Computer Systems, Inc.
Central Price Book
Copyright © 1984-2021

Date: Mar 31, 2022
Name: v6666chris
Time: 3:24 PM

DTS Preview Report

Site: 3 - SSCS, INC - Site 3

ID	Pack Sz	UPC	UPC Sz	Description	Dept	Sub	Type	Unit Cost	Unit List	Changed By	Last Up
01900000223	20		0	LIFESAVER 20CT WILD CHERRY	8	0	I	0.523	0	v6666raymond-Accept	03/23/2022
02200029009	18		0	HUBBA BUBBA SR BL RSBRY 5PC 18CT	8	0	I	0.518333	0	v6666raymond-Accept	03/23/2022
03129014572	12		0	GODIVA MINI 90% DARK CHOC 12CT 8PC	8	0	I	2.1325	0	v6666raymond-Accept	03/23/2022
07920000205	24		0	SWEETARTS CHEWY SOUR ROLL 24CT	8	0	I	0.8075	0	v6666raymond-Accept	03/23/2022

Site: 4 - SSCS, INC - Site 4

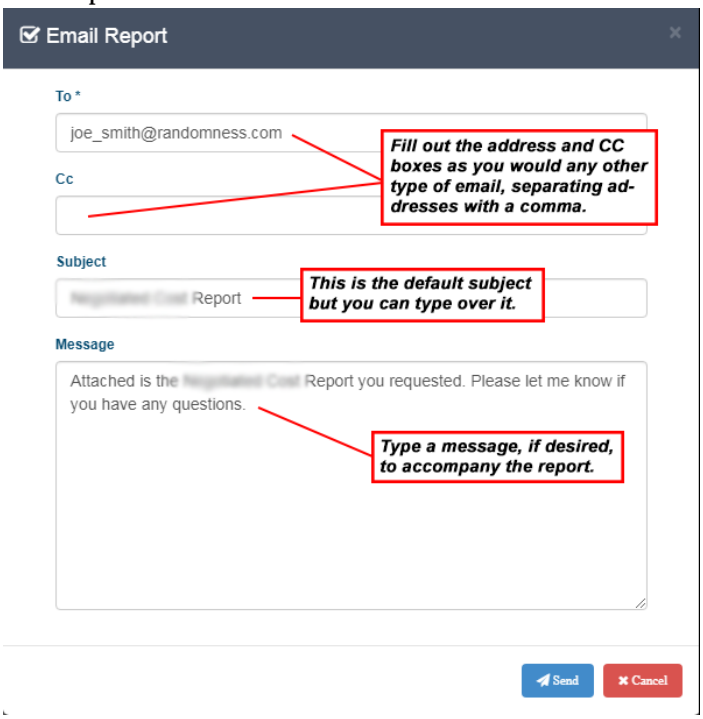
ID	Pack Sz	UPC	UPC Sz	Description	Dept	Sub	Type	Unit Cost	Unit List	Changed By	Last Up
01900000223	20		0	LIFESAVER 20CT WILD CHERRY	8	0	I	0.523	0	v6666raymond-Accept	03/23/2022
02200029009	18		0	HUBBA BUBBA SR BL RSBRY 5PC 18CT	8	0	I	0.518333	0	v6666raymond-Accept	03/23/2022
03129014572	12		0	GODIVA MINI 90% DARK CHOC 12CT 8PC	8	0	I	2.1325	0	v6666raymond-Accept	03/23/2022
07920000205	24		0	SWEETARTS CHEWY SOUR ROLL 24CT	8	0	I	0.8075	0	v6666raymond-Accept	03/23/2022

Tip Print controls you can use with this report are described in “Print Controls” on page A2-1.

Email Report

Central Price Book provides a way to email the report by simply clicking **Email Report**, which calls up the following window:

Email Report



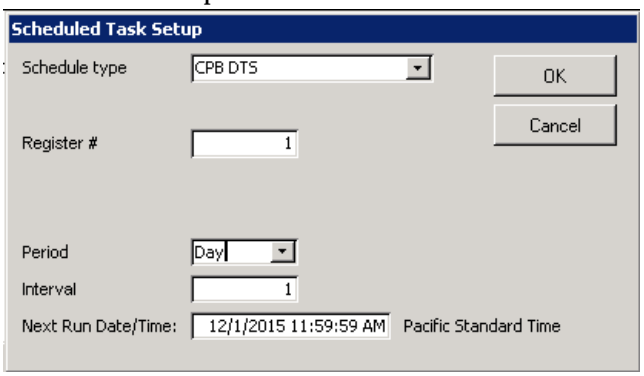
Fill out this simple form and press to email the report.

Scheduling Distribute to Sites Automatically

Central Price Book allows you to distribute changes to sites (DTS) automatically using the Scheduled Tasks feature of the Computerized Daily Book. This scheduling only needs to be set up once and is valid for all sites in Central Price Book.

1. In the CDB, on the **Setup** menu, click **CDBWin Settings** > the "Scheduled Tasks" tab > **New**. The following window appears:

Scheduled Task Setup



2. Work through this window as follows:

   Schedule Type — From the combo box, select CPB DTS.

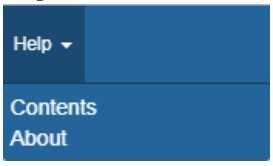
Register — Place any single digit here. This is simply a placeholder for now, but you must enter a digit.

Period — Select the time period—**Day**, **Week**, or **Month**—that will be used together with the Interval value (see next) to determine when your DTS event will run.

Interval — This value, together with the Period you set, determine how often your DTS event will run. A Period of Day with an Interval of **1** runs every day. A Period of Day with an Interval of **2** runs every other day. A Period of Month with an Interval of **3** runs every three months. And so on.

Help Menu

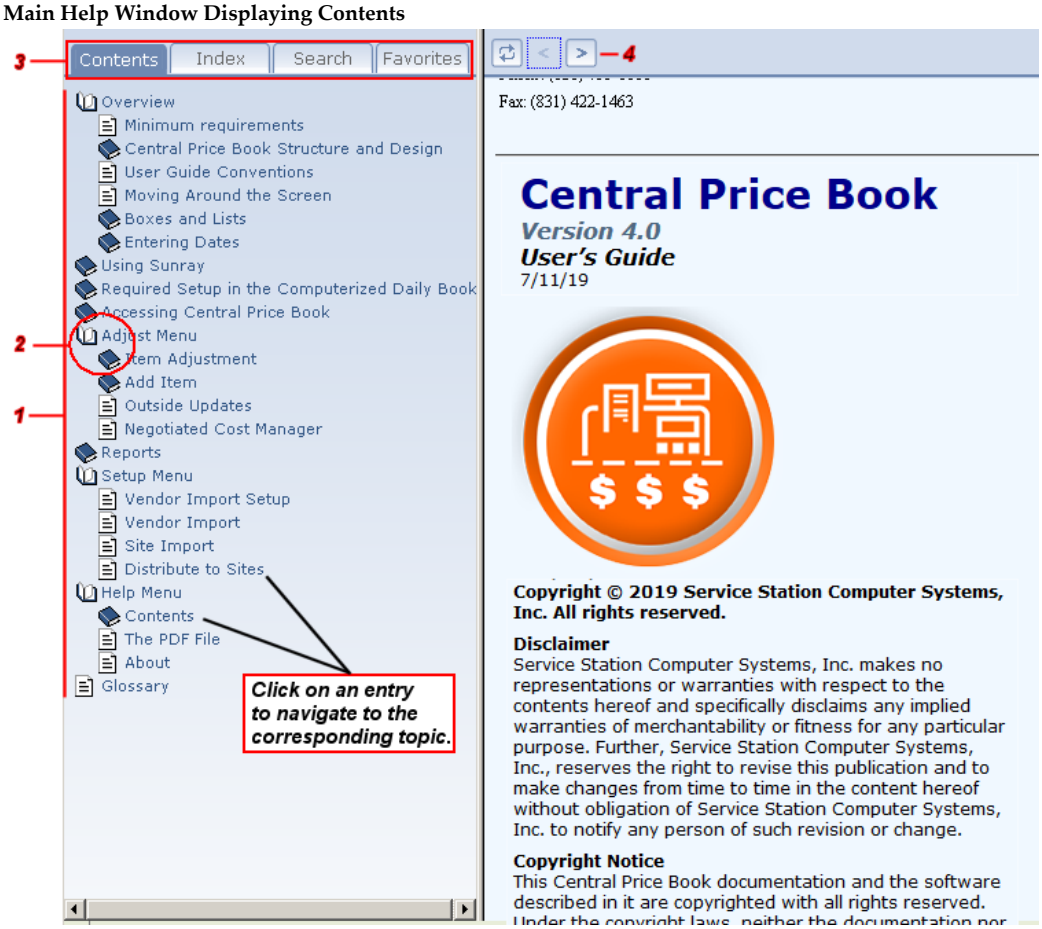
Help Menu



Access from the Help Menu

Online help is from the Help menu. On the **Help** menu, click **Contents**. The main help window appears in a new tab, displaying a table of contents in the left pane **(1)**. The entries visible in the help contents parallel the table of contents in the user's guide.

Main Help Window Displaying Contents

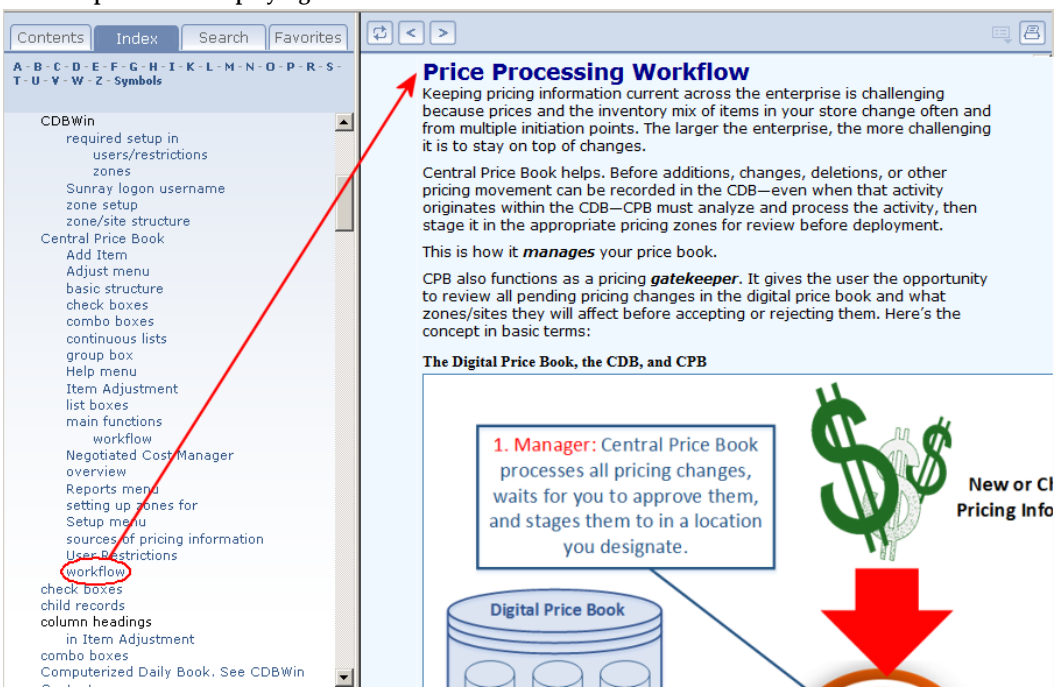


Contents entries can contain more than one topic level. To see a subtopic, click the small closed book icon **(2)** next to the topic to expand it. Click the open book icon **(2)** to close expanded topics. Every content entry is a *hyperlink*, which means you can click the entry to navigate to the corresponding topic which will display in the right pane.

Navigate back and forth between displayed topics using the arrow buttons at the top of each topic window **(4)**. Print the displayed topic by clicking the print icon **(5)**. A list of tabs running **(3)** across the top of the contents includes the “Index” tab and a “Search” tab that allows you to type in a subject, prompting the system to provide the best possible matches.

Click the "Index" tab to see display the help system's index in the left-hand pane of the help window:

Main Help Window Displaying Index



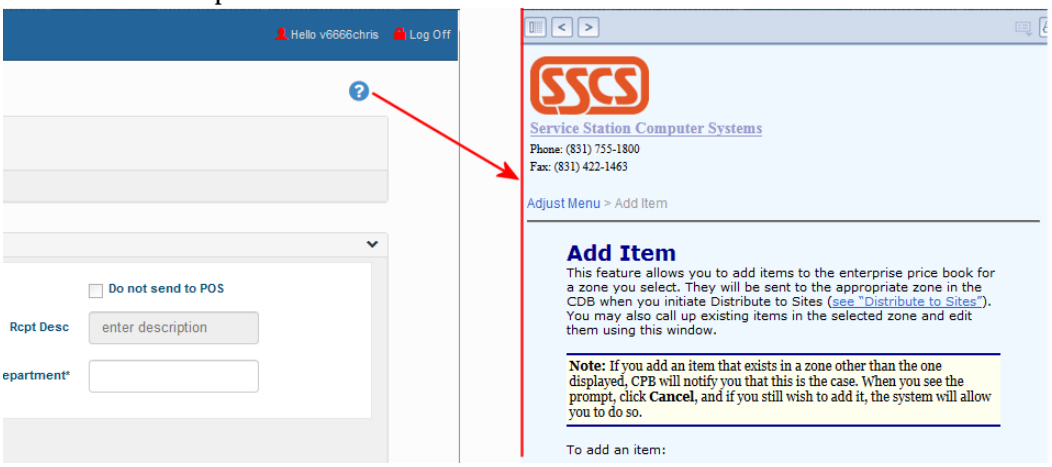
Help index entries parallel the index entries in the user's guide. They are hyperlinked—double-click an index entry to navigate to the corresponding topic which will appear in the right-hand pane of the help window. In the example above, index entry workflow was **selected**.

Context-Sensitivity

The help system provides context-sensitivity. If you are in an application window, either click ? or press **F1** and a help topic appears specific to the area of the system you are in.

For example, if you are in the Add Item window, and you wish to access help that tells you how to use it, place the cursor somewhere in the window and click **F1**. The information for the subject appears as follows:

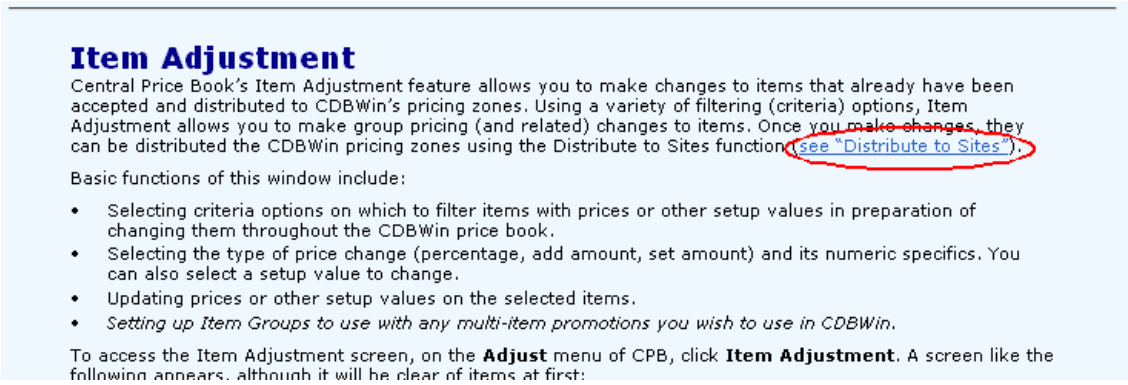
Context-Sensitive Help in Action



Hyperlinks

The help system contains *hyperlinks* that give you fast access to related information about a specific function. Typical hyperlinks appear as follows in the body of the help:

Hyperlink in a Help Window



Item Adjustment

Central Price Book's Item Adjustment feature allows you to make changes to items that already have been accepted and distributed to CDBWin's pricing zones. Using a variety of filtering (criteria) options, Item Adjustment allows you to make group pricing (and related) changes to items. Once you make changes, they can be distributed the CDBWin pricing zones using the Distribute to Sites function (see "Distribute to Sites").

Basic functions of this window include:

- Selecting criteria options on which to filter items with prices or other setup values in preparation of changing them throughout the CDBWin price book.
- Selecting the type of price change (percentage, add amount, set amount) and its numeric specifics. You can also select a setup value to change.
- Updating prices or other setup values on the selected items.
- *Setting up Item Groups to use with any multi-item promotions you wish to use in CDBWin.*

To access the Item Adjustment screen, on the **Adjust** menu of CPB, click **Item Adjustment**. A screen like the following appears, although it will be clear of items at first:

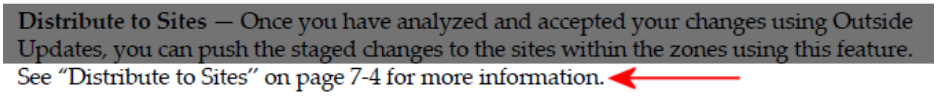
In the example above, clicking on "see Distribute to Sites" would take you to that topic in the help system.

The PDF File

The PDF file is an electronic version of the user's guide (the hard copy book version is printed directly from it). PDF copies are available from the SSCS Portal. Though the content is identical to the printed version, there are certain advantages to viewing a PDF online:

- The PDF is updated more quickly than the book.
- You can click on a hyperlinked contents entry to navigate to a specific topic.
- You can click a page number in the index to navigate to the reference in the text.
- You can click a cross-reference to move to the section and page to which it corresponds (the page number is there for people using the printed version—any reference with a page number, chapter/section title offset by quotation marks or both is usually a hyperlink), as shown below:

Hyperlinked Cross-Reference

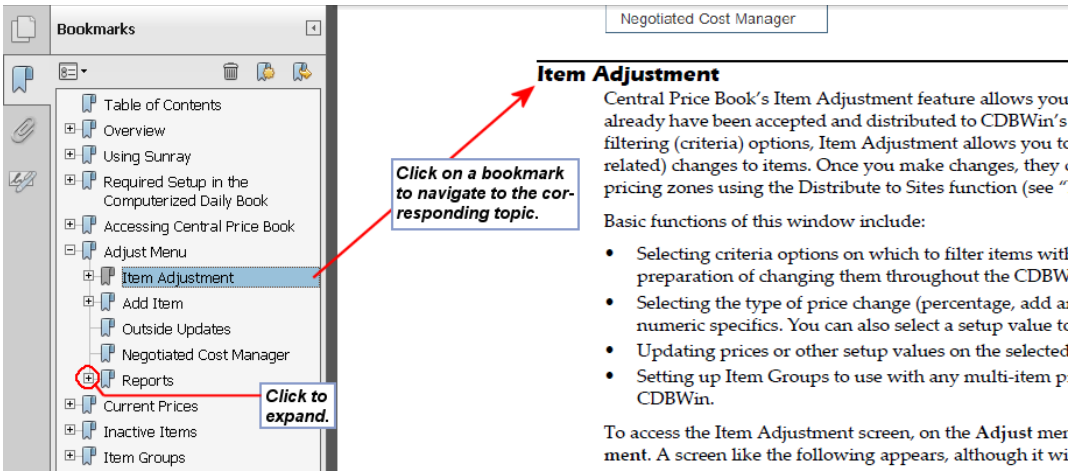


Distribute to Sites — Once you have analyzed and accepted your changes using Outside Updates, you can push the staged changes to the sites within the zones using this feature.

See "Distribute to Sites" on page 7-4 for more information.

- You can click on a bookmark to navigate to the corresponding heading (click the plus sign [+] to expand bookmarks with more than one level).

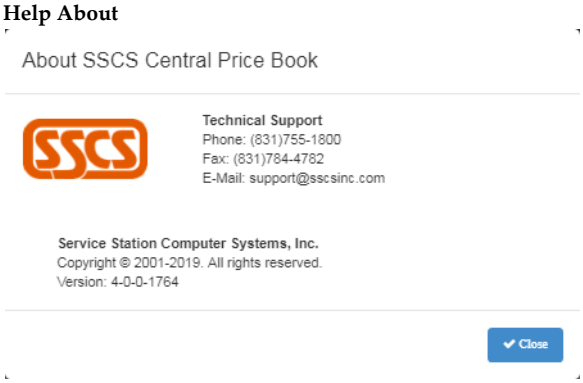
Bookmarks in PDF



About

Displays application name, build #, copyright and company information. Click on **support@sscsinc.com** to send an e-mail to the SSCS support department. Click **OK** to close the window.

Help About



Chapter 8. Frequently Asked Questions (FAQ)

Changing Item Types

Central Price Book (CPB) and the larger Computerized Daily Book (CDB) separate Inventory items into three different types:

- **Inventory (I)** — These are merchandise items that are bought and sold in your store. The consist of Dept/Acct numbers from **2–2999**.
- **Expense (X)** — These are expense items that are bought and expensed to the store. They consist of all Dept/Accts numbers over **3000**.
- **Sale Only (S)** — Sale only items are sold, but never bought. They usually consist of items assembled from other items that have been bought—a fountain drink is a good example.

There are two places in Central Price Book that you are allowed to change **Inventory** items to **Expense** items[1]:

- When you want to change the Department of an item or items (by clicking the **Dept** button) to an expense in the Item Adjustment screen.
- When you receive a new item or updated item into Outside Updates and want to change it to an Expense by entering an expense account number in the Department box.

1. The reverse is never true; and you cannot change **Sale Only** items at all.

Appendix 1: User Guide Conventions

Here are some conventions this manual uses:

Selecting items from a menu
"On the **Help** menu, click **About**" means choose the selection **About** from the **Help** menu.

Keystroke commands
When the manual directs you to type keyboard commands, the key/key combinations are represented in capital letters. For example, ALT means press the Alt key on your keyboard. ALT+X means while pressing the Alt key, press the X key.

Typing words
When the manual directs you to type a word, it does so using **bold** type, for example, "type **administrator**."

Breadcrumb trails
In most cases, when the manual represents a "breadcrumb trail"—a written representation of a non-keyboard-related action sequence—**bold** type is used, with each distinct action separated by a "greater than sign" (>). The following is an example:

Central Price Book > **Adjust** > **Outside Updates**

Usually breadcrumbs represent a sequence of button and menu selections that have to be executed to initiate a function or bring you to a specific locations. The exception is when you have to click on a tab. Tab choices are rendered in quotation marks, such as the "Zones" tab:

On the **Setup** menu, click **CDBWin Settings >** "Zones".

Commands selected from the Windows Start menu on Sunray are rendered in a similar way:

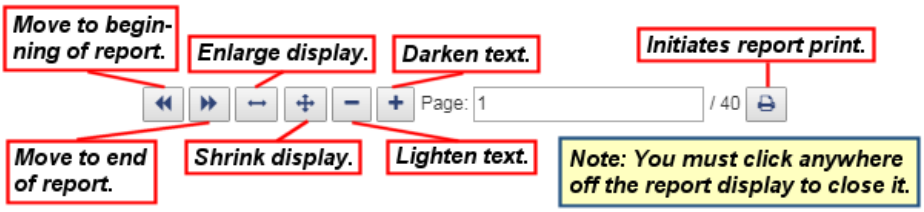
Click **Start > Programs > SSCS > CDBWin**.

Appendix 2: CPB Software Operating Conventions

The Central Price Book software uses a number of standard operating conventions. They are listed in the chapter for your convenience.

Print Controls

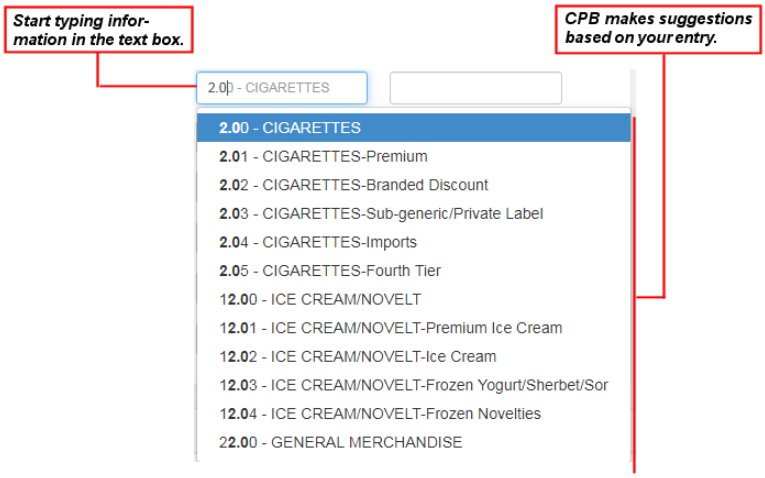
When a report displayed, Central Price Book displays a set of print controls at the top of the report. Consult the following illustration for what each of these controls do:



Boxes and Lists

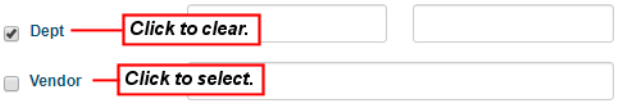
Boxes

Boxes, also known as text boxes, accept typed alphanumeric characters. Certain boxes in the application autocomplete, that is, if the system recognizes the first few alphanumeric characters you type it will attempt to provide the rest of the entry for you, by opening a list of suggestions based on what you entered:



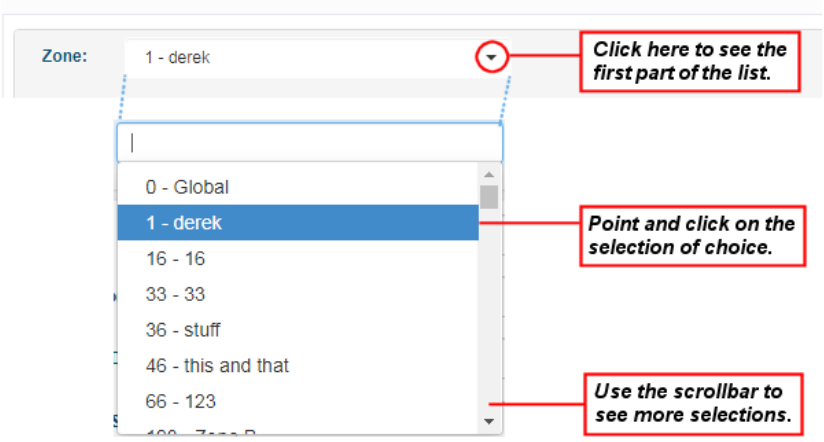
Check Boxes

Clicking an empty check box selects the item associated with it. Clicking a selected check box clears it.



List Boxes

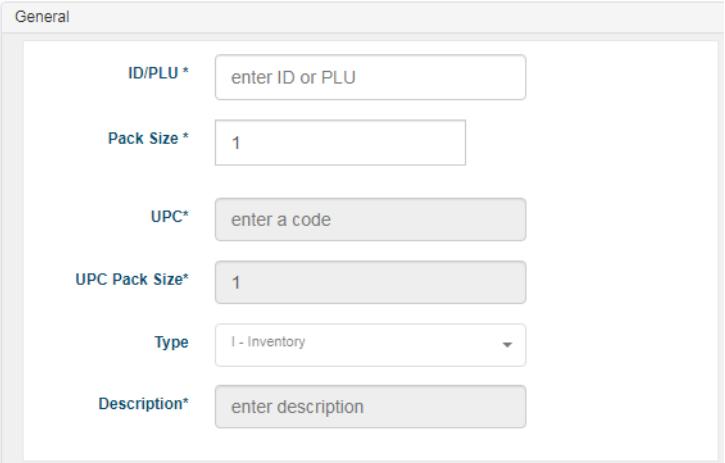
A list box provides access to available selections for a specific piece of information, for example, a zone list. Click on the downward pointing arrow to expand the available selections. You can then select the list item of choice (you may have to scroll down to find it).



Group Box

A group box refers to a set of options that is set off in the user interface by a surrounding border, indicating the items within the box are functionally related. The Source group box in the Vendor Import Setup screen is an example:

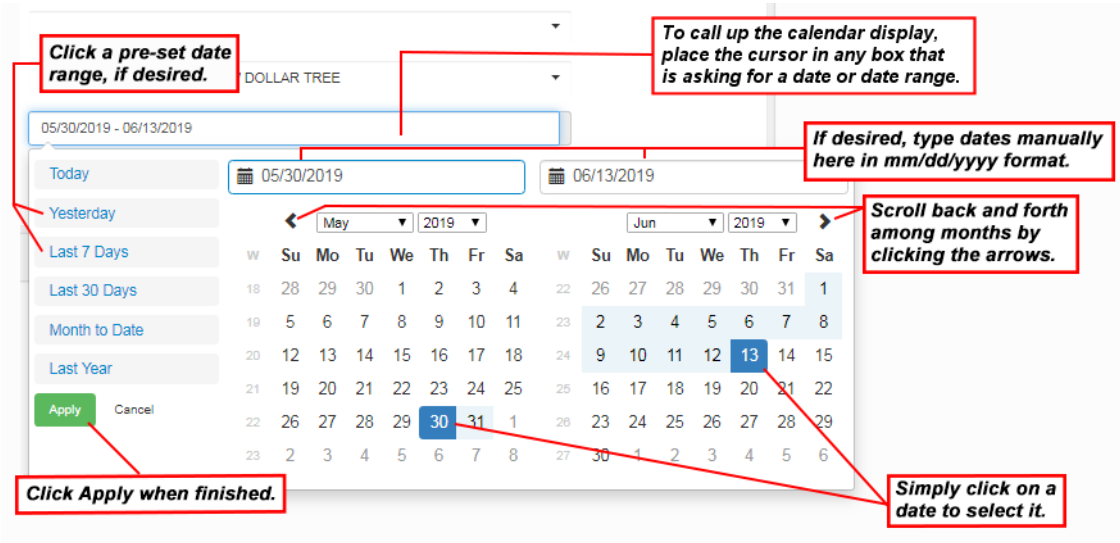
Group Box



Calendar Display

When encounter a box that calls for the entry of a date or date range, place your cursor in it and the calendar display appears:

Calendar Display



Select the date range for which you want to view or print information, using one of the options called out in the above image. When you are finished, click **Apply**.

Glossary

The following terms are common to Central Price Book and related products, services and programs.

adjustment Modification of pricing information for items. Can be done for multiple records using a variety of price change criteria using CPB's Item Adjustment feature.

build master See *master price file.*

Central Price Book (CPB) SSCS's web-based application for enterprise pricing management. CPB allows pricing information, imported or recorded from a number of different sources in a number of different ways, to be transferred to the zones and sites in the CDB.

child record In Outside Updates, the record that contains the item's pricing information before the change occurred in the CPB, so you can easily compare it to the changed information (displayed in the parent record directly above it. You display child records by clicking on the ⊞ to the left of the item record.

Computerized Daily Book (CDB) SSCS's flagship back office system that works seamlessly with Central Price Book. CPB helps manage the price book for the sites in the CDB, which itself also allows a degree of price management.

coverage Term used in CPB to describe the designated zones and sites adjusted items and outside updates will be pushed to when s Distribute to Sites event is initiated.

CPB's digital aggregation of all active pricing information within the enterprise, including all sites and zones.

divergent values In the Item Adjustment screen, values for the same item that differ across sites. They are highlighted in pink.

Enterprise Zone See *Global Zone*.

Future Pricing CPB feature that allows users to ready price changes to start at a specific date and time for a group of items designated using the Item Adjustment window. Future prices appear in the CPB's Pricing Event Calendar.

Global Zone Zone that contains all of the sites in the enterprise. Often represented by the number 0 and sometimes referred to as the Enterprise Zone.

invalid items Items in which the single to multipack relationship existing in Central Price Book does not match that in the CDB. These cause conflicts and are known as invalid items.

master price file The current digital price book for all zones. When you build a master and have outside updates pending to be distributed to sites, the build master process eliminates those pending changes, essentially ignoring and discarding said outside updates.

negotiated cost Cost that you and the vendor have agreed upon for a finite period of time.

negotiated cost set Groups of items that have been negotiated collectively with a vendor, each with their own respective effective date range. In CPB, these sets are provided the following label: *Set Amount* | *Vendor* | *Effective Time/Date* | *Expiration Time/Date.*

outside updates Potential changes or additions to pricing records in CPB that come from a location "outside" the price book, such as at a CDB site or through a vendor import event. These changes are identified in the Outside Updates window where you can review, accept, and edit them before committing them to the price book.

parent record In Outside Updates, the record that contains the changed pricing information, so you can easily compare it to the information that was on the record before the change (staged in the child record directly below it. You display child records by clicking on the ⊞ to the left of the item record.

Portal (SSCS) User name/password-protected Internet business resource with content exclusive to SSCS users on Sunray. It also the gateway to the first of a next generation of Web-based SSCS applications, including Central Price Book.

price book The data file containing the pricing information for all the zones and sites in your operation. For the purposes of this manual, synonymous with .

pricing event Something that causes a change to the information in one or more pricing records. Most commonly, pricing events initiate changes to large numbers of records.

priority order The order of sites in a zone—which you define—is significant, in that CPB will look to the topmost site first to find items from which to build a zone master (see "CDB Zones and Sites" on page 1-8) and then look in subsequent sites one by one in descending order of the list. For example, if:

Item #012345678910 has a list price of $2.25 in Site 1 and...

Item #012345678910 has a list price of $2.50 in Site 2 and...

Site 1 has a higher priority than Site 2, when a zone master is built, the second instance of the item will be ignored. In other words, the master will include the item at a list price of $2.25. Priority Order is set in the "Zones" tab of CDBWin Settings in the CDB.

sites User-defined parts of a zone established for the purposes of pricing management. The items in a site usually have something in common that makes it logical to push price information changes to them as a group. For example, a site often represents an individual store, but may represent a department or departments across stores. Sites are subordinate to zones. A zone and a site can have a one-to-one relationship.

Sunray Sunray ASP (application service provider) product, a "thin-client" software platform through which the customer's SSCS software (like Central Price Book) is managed, maintained and updated on SSCS servers through the Internet.

vendor Company which provides inventory items to store. Some vendors make their pricing files available electronically which Central Price Book and import using the Vendor Import feature. In SSCS terminology, "supplier" is synonymous with "vendor".

zone master The file containing all the pricing information for the zone. The zone master is updated when changes to the zone's pricing information are accepted and updated in CPB's Distribute to Sites or Add Item functions. When pending changes are accepted and deployed into the CDB, the master is rebuilt and reflects the updated for that zone.

zones User-defined sections of the Central Price Book to which pricing information changes can be applied. The inventory items within a zone usually have common characteristics (perhaps representing a department or a geographic location) that make it logical, from a pricing management standpoint, to combine them for the purposes of "pushing" pricing changes onto them. User-defined sites can be assigned to zones, making pricing control even more granular. Sites are subordinate to zones. A global (enterprise) zone contains all sites. A zone and site can have a one-to-one relationship.

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