Import Tool Manual

For Petrosoft Customers

Version 5

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Petrosoft LLC

290 Bilmar Drive, Pittsburgh, PA 15205

www.petrosoftinc.com

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Getting Started with the Import Tool

With the Import Tool, you can quickly and easily set up your Price Book at C-Store Office account.

Using the Import Tool, you can do the following:

- Set up your Price Book, including the following actions with the Price Book elements:
  - Copy the item tags between accounts,
  - Import the items, item tags, promotions, and vendors from different data sources to the drafts,
  - Export the items, item tags, promotions, and vendors to the selected account, location, or CSV or XLSX file,
  - Manage the Price Book elements.
- Import and update the detailed information about the account's stations.
- Perform the following quick operations:
  - Synchronize the Price Book data,
  - Export items retails to PIM (available only for the users of the PIM module),
  - Assign item taxonomy.
- View user actions history log and reverting last actions
- Set up taxes for the locations

To be able to use the Import Tool, ensure that the following settings are configured:

- C-Store Office account is created for you.
- Import Tool module is enabled for your user.

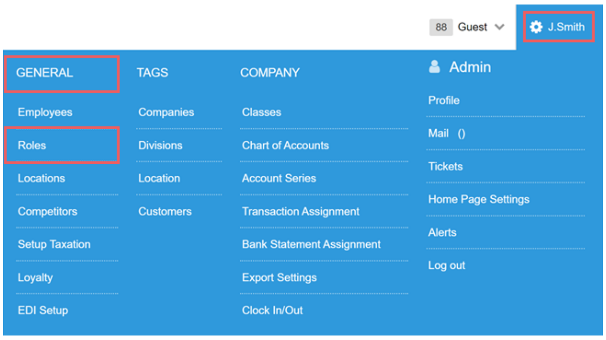
To learn more about the Import Tool and start working with it, go to the following sections:

- Turning On Import Tool Module
- Opening the Import Tool
- Configuring Import Tool Permissions
- Import Tool Main Interface
- Main Workflows Overview
- Setting Up Price Book
- Setting Up Taxes for Locations
- Working with Drafts
- Working with Data Sources Panel

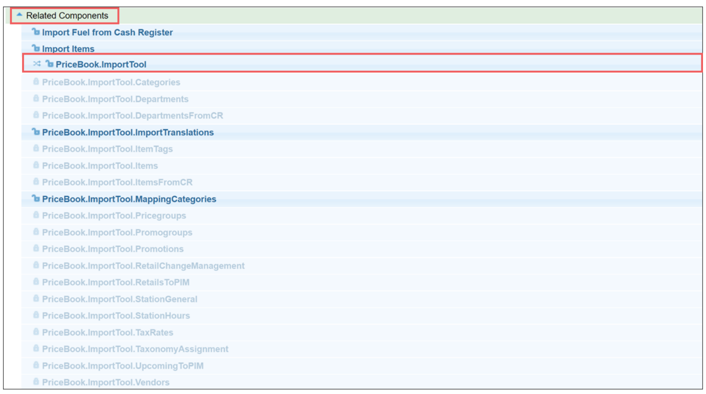
Turning on the Import Tool Module

Before starting to work with the Import Tool, make sure the Import Tool module is activated for your user's role. Do the following:

1. Go to **Settings** > **General** > **Roles**.



2. Select the user's role and then click **Edit**.
3. Go to **Access Data types** > **Price Book** > **Related Components**.
4. Make sure the **PriceBook.ImportTool** component is activated. If not, activate it.



C-Store Office provides a separate component for every Import Tool section. You can activate or deactivate them for employees to restrict user access to specific Import Tool functionality. For details, see Import Tool Components.

Configuring Import Tool Permissions

Before you start working with the Import Tool, you must make sure that the following settings are configured for the account:

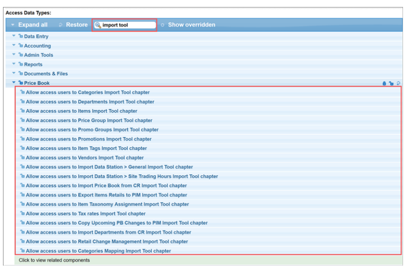
- You have the necessary permissions to access in the Import Tool sections
- The necessary components are enabled for the account
- You have access to specific stations data

Import Tool Permissions

Access to the Import Tool sections is regulated by permissions. By granting or removing permissions from users and roles in C-Store Office, you can provide or restrict access to specific Import Tool functionality for employees in the company.

To access the permissions list for the Import Tool:

1. From the C-Store Office home page, go to **Settings** > **General** > **Employees** or **Roles**.
   - For roles: In the roles list, select the necessary role and at the bottom of the list, click **Edit**.
   - For employees: In the employees list, select the necessary employee, navigate to **Login and Password** and to the right of the **Role** list, click **Advanced**.
2. (Optional) To filter out permissions related to the Import Tool, in the search box at the top of the permissions list, enter *Import Tool* and press **Enter** on the keyboard.
3. In the permissions list, under **Price Book**, view what permissions are granted to the role or employee. For more details about granting and removing permissions, see Petrosoft Cloud Help > C-Store Office > Settings > General > Role and Permission Management.



C-Store Office provides the following permissions for the Import Tool.

- **Allow access users to Categories Import Tool chapter**: Users to whom this permission is granted can view and work with the **Price Book** > **Categories** section in the Import Tool. For more details, see Working with Price Book Categories.
- **Allow access users to Departments Import Tool chapter**: Users to whom this permission is granted can view and work with the **Price Book** > **Departments** section in the Import Tool. For more details, see Working with Price Book Departments.
- **Allow access users to Items Import Tool chapter**: Users to whom this permission is granted can view and work with the **Price Book** > **Items** section in the Import Tool. For more details, see Working with Price Book Items.
- **Allow access users to Price Group Import Tool chapter**: Users to whom this permission is granted can view and work with the **Price Book** > **Price Group** section in the Import Tool. For more details, see Working with Price Book Price Groups.
- **Allow access users to Promo Groups Import Tool chapter**: Users to whom this permission is granted can view and work with the **Price Book** > **Promo Groups** section in the Import Tool. For more details see Working with Price Book Promo Groups.
- **Allow access users to Promotions Import Tool chapter**: Users to whom this permission is granted can view and work with the **Price Book** > **Promotions** section in the Import Tool. For more details, see Working with Price Book Promotions.
- **Allow access users to Item Tags Import Tool chapter**: Users to whom this permission is granted can view and work with the **Price Book** > **Item Tags** section in the Import Tool. For more details, see Working with Price Book Item Tags.
- **Allow access users to Vendors Import Tool chapter**: Users to whom this permission is granted can view and work with the **Price Book** > **Vendors** section in the Import Tool. For more details, see Working with Vendors.
- **Allow access users to Import Data Station > General Import Tool chapter**: Users to whom this permission is granted can view and work with the **Import Data Station** > **General Import Tool** section in the Import Tool. For more details, see General Station Settings.
- **Allow access users to Import Data Station > Site Trading Hours Import Tool chapter**: Users to whom this permission is granted can view and work with the **Import Data Station** > **Site Trading Hours** section in the Import Tool. For more details, see Site Trading Hours.
- **Allow access users to Import Price Book from CR Import Tool chapter**: Users to whom this permission is granted can view and work with the **Import PB from CR** section in the Import Tool. For more details, see Import PB from Cash Register.

- **Allow access users to Export Items Retails to PIM Import Tool chapter**: Users to whom this permission is granted can view and work with the **Quick Operations** > **Export Items Retails to PIM** section in the Import Tool. For more details, see Export Item Retails to PIM.
- **Allow access users to Item Taxonomy Assignment Import Tool chapter**: Users to whom this permission is granted can view and work with the **Quick Operations** > **Item Taxonomy Assignment** section in the Import Tool. For more details, see Item Taxonomy Assignment.
- **Allow access users to Tax rates Import Tool chapter**: Users to whom this permission is granted can view and work with the **Settings** > **Tax Rates** section in the Import Tool. For more details, see Setting Up Taxes for Locations.
- **Allow access users to Copy Upcoming PB Changes to PIM Import Tool chapter**: Users to whom this permission is granted can view and work with the **Quick Operations** > **Copy Upcoming PB Changes to PIM** section in the Import Tool. For more details, see Copy Upcoming PB Changes to PIM.
- **Allow access users to Import Departments from CR Import Tool chapter**: Users to whom this permission is granted can view and work with the **Import PB from CR** > **Import Departments from CR** section in the Import Tool. For more details, see Import Departments from Cash Register.
- **Allow access users to Retail Change Management Import Tool chapter**: Users to whom this permission is granted can view and work with the **Quick Operations** > **Retail Change Management** section in the Import Tool. For more details, see Retail Change Management.
- **Allow access users to Categories Mapping Import Tool chapter**: Users to whom this permission is granted can view and work with the **Import PB from CR** > **Map Categories** section in the Import Tool. For more details, see Map Categories.

Import Tool Components

By default, when a new account is created, the following components are enabled for the account owner:

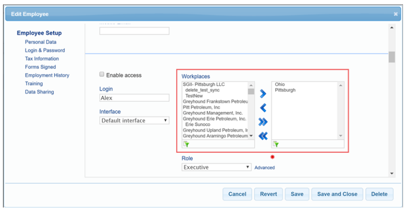
- **PriceBook.ImportTool**
- **PriceBook.ImportTool.DepartmentsFromCR**
- **PriceBook.ImportTool.ItemsFromCR**
- **PriceBook.ImportTool.MappingCategories**
- **PriceBook.ImportTool.RetailChangeManagement**.

Correspondingly, the account owner can access the following modules and sections in the Import Tool:

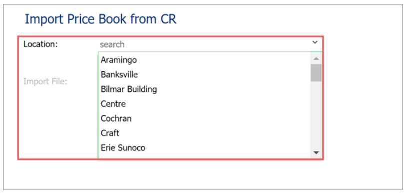
- **Import PB from CR** and all its sections
- **Quick Operations** > **Retail Change Management**

Access to Stations

A user working with the Import Tool has access only to data of those stations access to which is allowed to him or her. To let the user work with the import data of a specific station, add this station to the list of allowed workplaces in the **Employee Setup** form for this user.



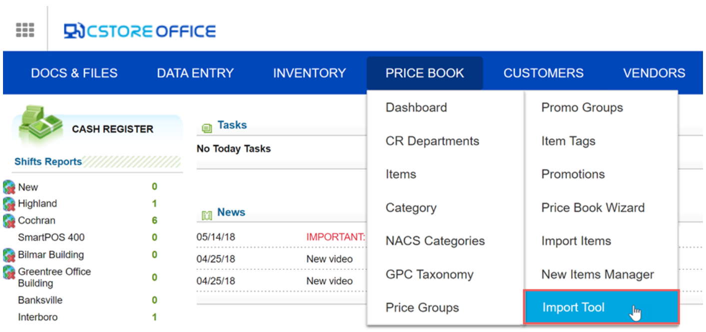
For example, if you add one or more divisions to the list of allowed workstations, the user will have access to all stations of these divisions:



Opening Import Tool

To open the Import Tool:

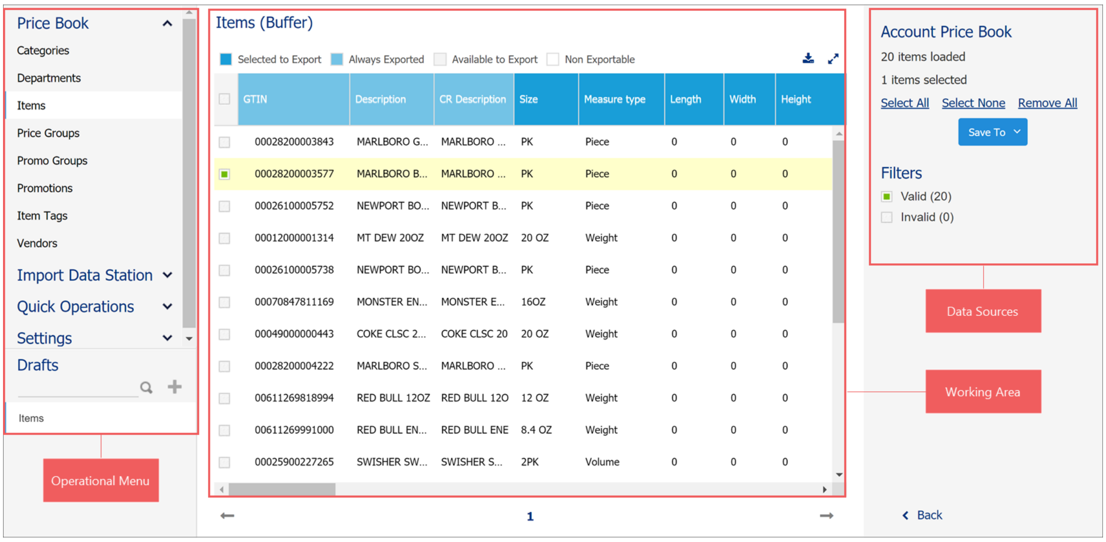
1. Go to **Home Page** > **Main Menu**.
2. Click **Price Book** > **Import Tool**.



Import Tool Main Interface

The Import Tool main interface consists of four main sections:

- **Operational Menu**, which includes the following sections:
    - **Price Book** section used for selecting the Price Book tools to be configured.
    - **Import Data Station** section used for importing and updating data on the account's stations.
    - **Quick Operations** section used for synchronizing the Price Book data, exporting items retails to PIM (available only for the users of the PIM module), assigning the item taxonomy.
    - **Settings** section used for configuring taxes.
    - **Drafts** section used for creating or selecting drafts to be filled with importing data.
- **Working Area** used for performing operations with objects selected in the Operational Menu .
- **Data Sources panel** used for performing the following actions:
    - Importing data: populating the draft with the data from different sources.
    - Editing draft: creating new data manually, removing data, saving data in the draft.
    - Exporting data: saving draft's data to a file or to the location.
- **Main Menu buttons**:
    - The **History Log** button: opens the History Log journal.
    - The **Help** button: opens Petrosoft Cloud Help.
    - The **Submit Ticket** button: opens the Tickets form where you can leave your feedback or ask a question by submitting a ticket.



Main Workflows Overview

Generally, the process of setting up a Price Book with the Import Tool includes the following main steps:

Steps	Corresponding menu	Example
Step 1: Select a Price Book element to be configured.	Go to **Operational Menu** > **Price Book**	- The **Items** element is selected.
Step 2: Take a draft.	Go to **Operational Menu** > **DRAFTS**	- The **New_Items** draft is created and selected for further editing.
Step 3: Populate the draft with the relevant data.	Go to **Working Area**	- All Price Book items from the selected location are uploaded to the draft's buffer. - Valid items only are selected and saved to the **New_Items** draft.
Step 4: Copy data from the draft to the location or a file.	Go to **Data Sources** panel	- The data from the **New Items** draft are imported to your location.

To create a Price Book from scratch on your account, you can use any of the following scenarios:

- Importing Price Book from Account or Station
- Importing Price Book from Cash Register Dump File
- Importing Price Book from a File
- Importing Price Book from Handheld Inventory File

How to Import Price Book from Account or Station

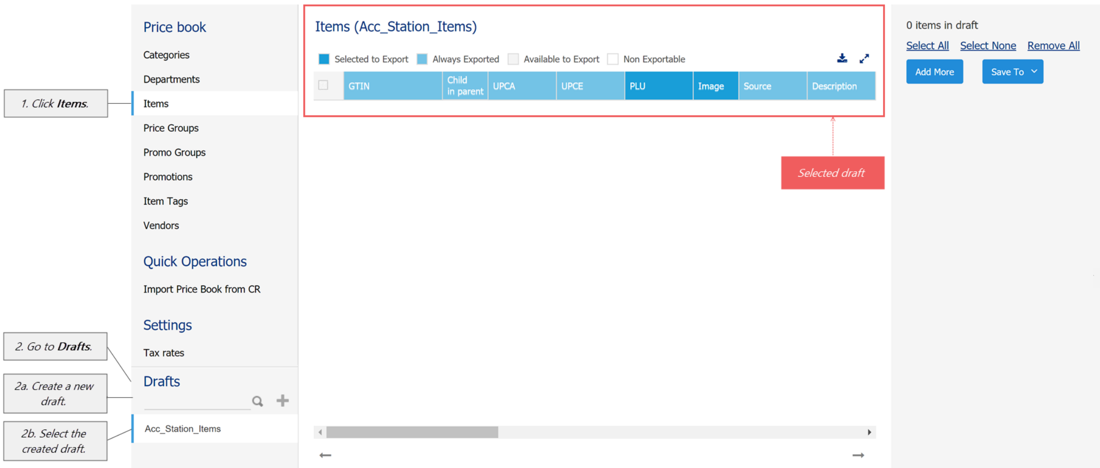
PRE-REQUISITES

- C-Store Office account is created for you.
- Import Tool module is enabled for the user's role. For details, see Turning On Import Tool Module.
- You have access to the account or station with a populated Price Book.
- Import Tool is opened. For details, see Opening Import Tool.

STEPS

1. Select a price book element. Go to **Price Book**, and then click **Items**.
2. Take a draft. Go to **Drafts**, and then do the following:
   a. Create a new items draft. For details, see Working with Drafts List.

b. Select the newly created draft.



3. Populate the selected draft with the relevant data. Do the following:

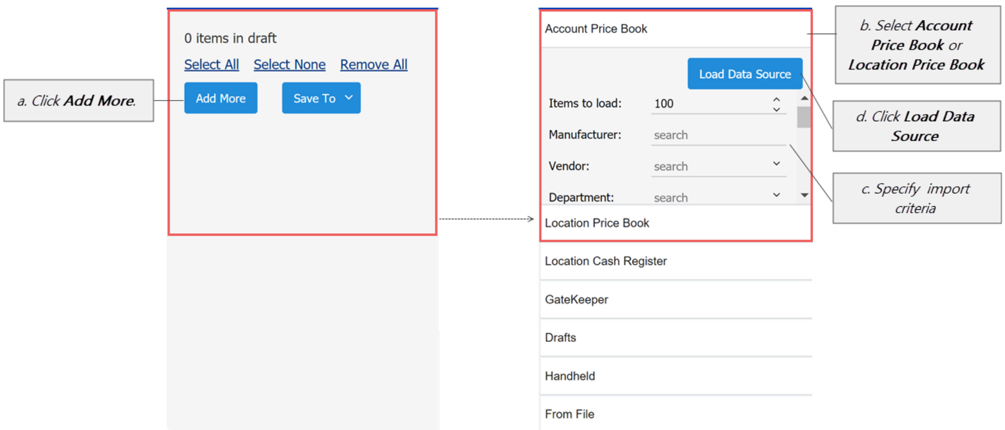
a. Go to the **Data Sources** panel, and then click **Add More**.

b. Depending on the import source you want to use, click **Account Price Book** or **Location Price Book**.

c. Specify the importing criteria. For details, see one of the following sections:

- Importing Items from Account Price Book
- Importing Data from Location Price Book

d. Click **Load Data Source**.



e. Wait until the data is uploaded to the **Items (Buffer)** table.

f. (Optional) Edit data in the **Items (Buffer)** table. For details, see Editing Data in Buffer.

g. Select the items you need. To select all items, click **Select All**.

h. Save selected items from the buffer to your draft. For details, see Saving Data from Buffer to Draft.

4. Copy data from the draft to your location. For details, see Exporting Draft Data.

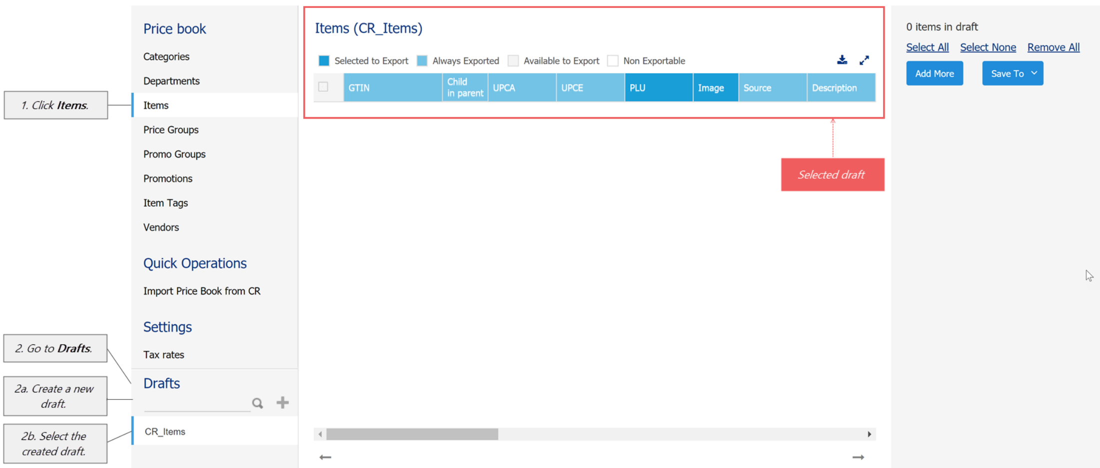
How to Import Price Book from Cash Register Dump File

PRE-REQUISITES

- C-Store Office account is created for you.
- Import Tool module is enabled for the user's role. For details, see Turning On Import Tool Module.
- You have access to the location using any of the following cash registers:
  - Gilbarco Passport
  - Verifone Ruby
- Import Tool is opened. For details, see Opening Import Tool.

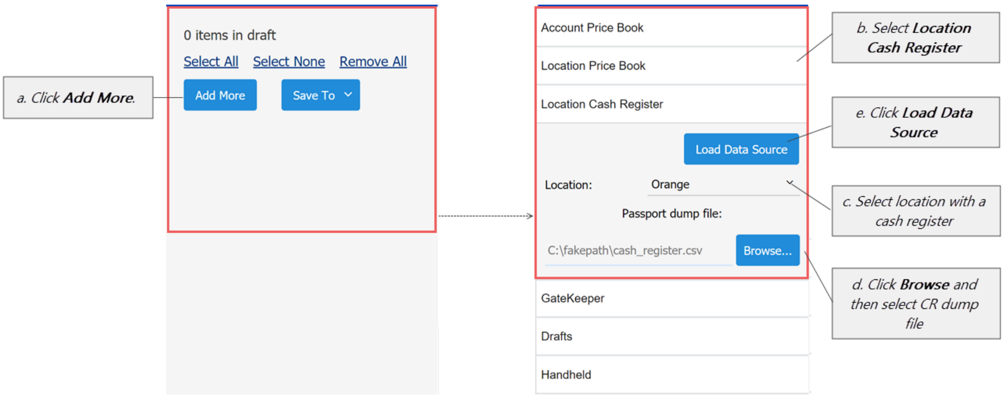
STEPS

1. Select a price book element. Go to **Price Book**, and then click **Items**.
2. Take a draft. Go to **Drafts**, and then do the following:
   a. Create a new items draft. For details, see Working with Drafts List.
   b. Select the newly created draft.

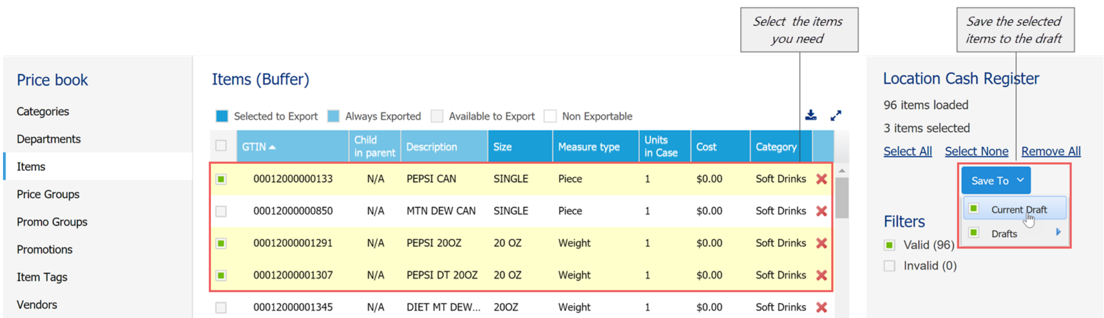


3. Populate the selected draft with the relevant data. Do the following:
   a. Go to the **Data Sources** panel, and then click **Add More**.
   b. Click **Location Cash Register**.

c. In the **Locations** list, select the location with the connected cash register from which you want to import data.
d. Click **Browse**, and then select the cash register's dump file.
e. Click **Load Data Source**.



f. Wait until the data is uploaded to the **Items (Buffer)** table.
g. (Optional) Edit data in the **Items (Buffer)** table. For details, see Editing Data in Buffer.
h. Select the items you need. To select all items, click **Select All**.
i. Save selected items from the buffer to your draft. For details, see Saving Data from Buffer to Draft.



4. Copy data from the draft to your location. For details, see Exporting Draft Data.

How to Import Price Book from a File

PRE-REQUISITES

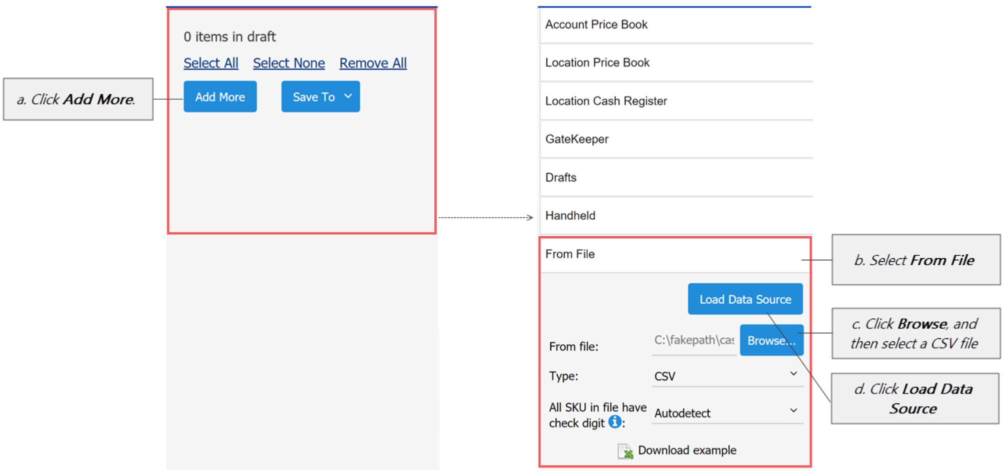
- C-Store Office account is created for you.
- Import Tool module is enabled for the user's role. For details, see Turning On Import Tool Module.
- Import Tool is opened. For details, see Opening Import Tool.

STEPS

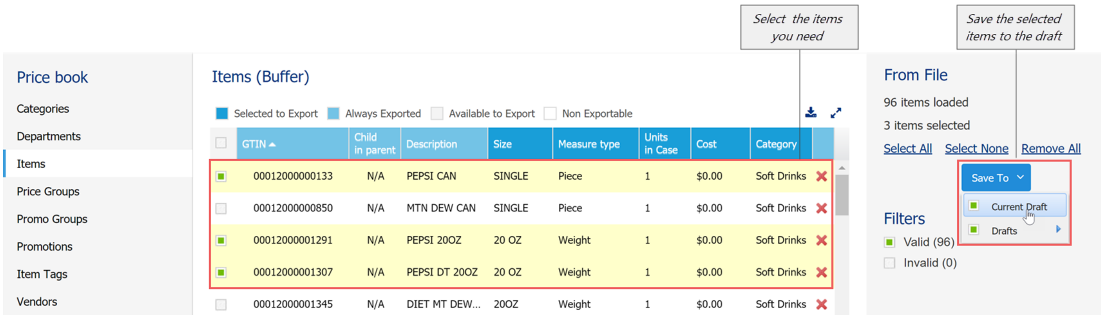
1. Select a price book element. Go to **Price Book**, and then click **Items**.
2. Take a draft. Go to **Drafts**, and then do the following:

a. Create a new items draft. For details, see Working with Drafts List.
b. Select the newly created draft.

3. Populate the selected draft with the relevant data. Do the following:
   a. Go to the **Data Sources** panel, and then click **Add More**.
   b. Click **From File**.
   c. Click **Browse**, and then select the cash register's dump file.
   d. Click **Load Data Source**.



   e. Wait until the data is uploaded to the **Items (Buffer)** table.
   f. (Optional) Edit data in the **Items (Buffer)** table. For details, see Editing Data in Buffer.
   g. Select the items you need. To select all items, click **Select All**.
   h. Save selected items from the buffer to your draft. For details, see Saving Data from Buffer to Draft.



4. Copy data from the draft to your location. For details, see Exporting Draft Data.

How to Import Price Book from Handheld Inventory File

PRE-REQUISITES

- C-Store Office account is created for you.
- Import Tool module is enabled for the user's role. For details, see Turning On Import Tool Module.
- Import Tool is opened. For details, see Opening Import Tool.
- Inventory files with scanned items are sent from handheld to C-Store Office.

STEPS

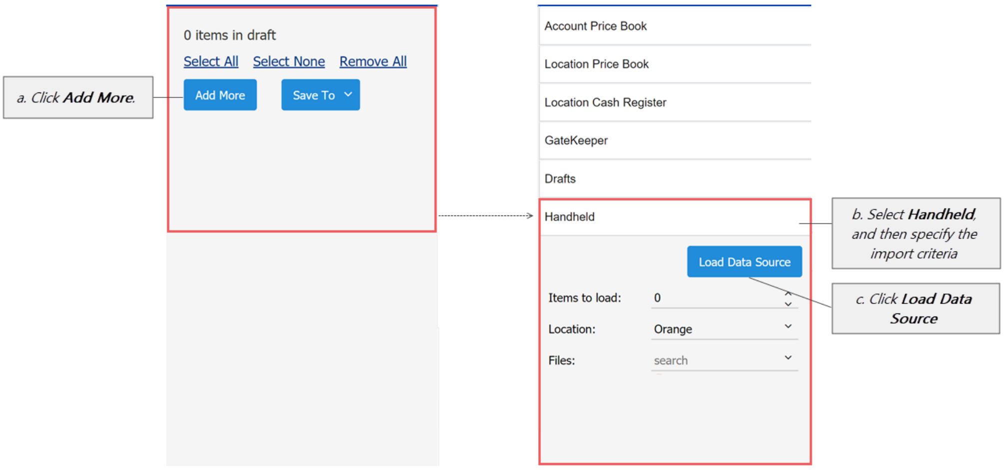
1. Select a price book element. Go to **Price Book**, and then click **Items**.
2. Take a draft. Go to **Drafts**, and then do the following:
   a. Create a new items draft. For details, see Working with Drafts List.
   b. Select the newly created draft.

3. Populate the selected draft with the relevant data. Do the following:
   a. Go to the **Data Sources** panel, and then click **Add More**.
   b. Click **Handheld**.
      - **Items to load** - displays the number of items to be uploaded to the buffer.

> To upload less items, enter your number manually. In this case the most popular and frequently used items will be uploaded.

- **Location** - start typing the location's name or select one or several locations from the list.
- **Files** - select the handheld inventory file from the list.

c. Click **Load Data Source**.

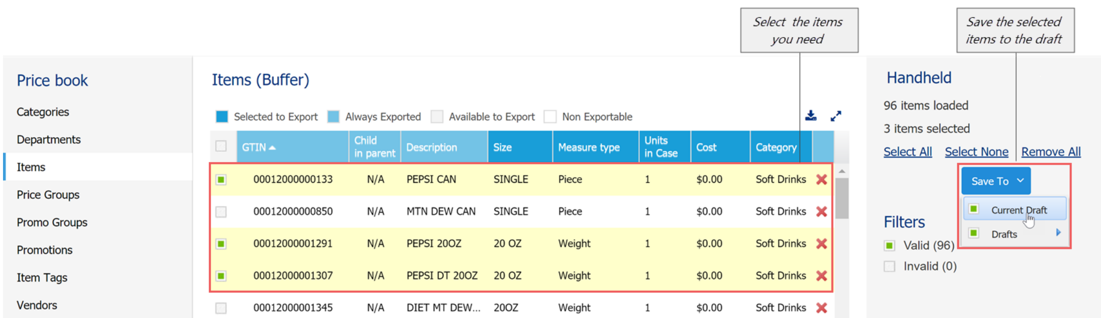


d. Wait until the data is uploaded to the **Items (Buffer)** table.

e. (Optional) Edit data in the **Items (Buffer)** table. For details, see Editing Data in Buffer.

f. Select the items you need. To select all items, click **Select All**.

g. Save selected items from the buffer to your draft. For details, see Saving Data from Buffer to Draft.



4. Copy data from the draft to your location. For details, see Exporting Draft Data.

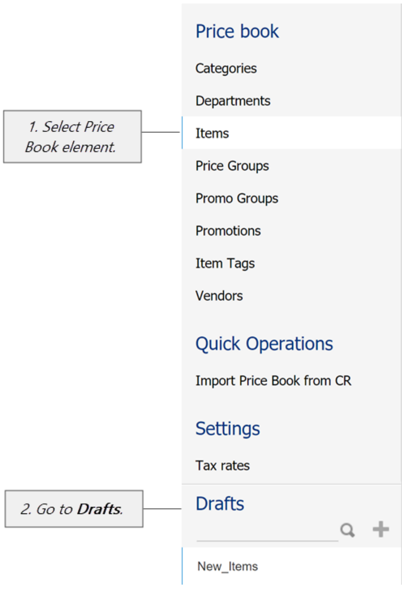
Setting up Price Book

You can manage the following Price Book elements with the Import Tool:

- Item Tags:
  - Categories, see Working with Price Book Categories.
  - Departments, see Working with Price Book Departments.
  - Price Groups, see Working with Price Book Price Groups.
  - Promo Groups, see Working with Price Book Promo Groups.
  - Other Item Tags, see Working with Price Book Item Tags.
- Items, see Working with Price Book Items.
- Promotions, see Working with Price Book Promotions.
- Vendors, see Working with Vendors.
- Lotteries, see Working with Lottery Games.

To start configuring a Price Book, follow the steps:

1. Go to **Operational Menu** > **Price Book**.
2. Click the element you want to configure and then go to the **DRAFTS** section.



You can manage the Price Book elements creating a new draft or using the preconfigured draft.

For more information on how to create a new draft or use a preconfigured draft, see Working with Drafts List.

Working with Price Book Categories

With the Import Tool, you can perform the following operations with the categories:

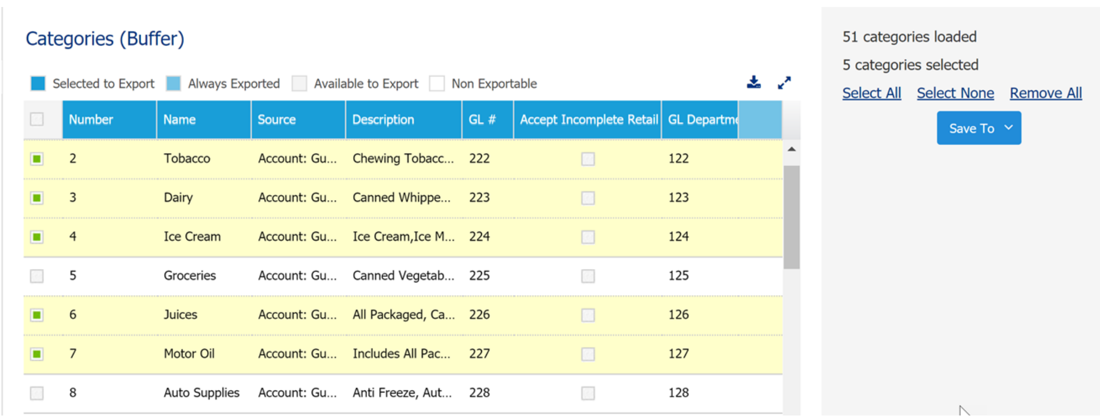
- Copy the Price Book categories between accounts.
- Import categories to the current account from the following data sources:
  - Account Price Book
  - GateKeeper (for more details, see Importing Data from GateKeeper)
  - Drafts
  - File (for more details, see Preparing a File for Data Import)
- Export categories from the current account to a file.
- Manage the account's categories.

Copying Categories between Accounts

To copy the Price Book categories from one account's price book to another account, follow the steps:

1. Import categories from the source account to the draft. Do the following:
   a. In the top right corner of the page, switch to account you want to import categories from.
   b. Go to **Operational Menu** > **Price Book** and then click **Categories**.
   c. Go to **DRAFTS** and create a new draft. For details, see Working with Drafts List.
   d. Go to **Data Sources Panel** and then click the **Add More** button.
   e. Expand the **Account Price Book** section.
   f. At the bottom of the section, click the **Load Data Source** button.
   g. Wait until all account's categories are uploaded to the **Categories (Buffer)** table.
   h. Select the categories you want to import into another account.

      To select all categories, click **Select All**.



   i. Save selected categories from the buffer to your draft. For details, see Saving Data from Buffer to Draft.

2. Export categories from the saved draft to the destination account. Do the following:
   a. In the top right corner of the page, switch to account you want to export the categories to.
   b. Go to **DRAFTS** and then select the saved draft with the imported categories.
   c. Make sure the draft's table contains the categories you need.

   > Before exporting the draft's table to another account, you can edit the draft's data manually. For example, you can select the columns for exporting. For details, see Editing Draft Manually.

   d. Go to **Data Sources Panel** and then on the right of the **Save To** button, click the drop down arrow.
   e. Select any location and then click the **Save To** button.

   > The categories are configured on the account level. So, in case the categories are exported to any location, the categories of the whole account are updated automatically as well.

3. Make sure the categories are copied successfully. Go to CSO main menu and then click **Price Book** > **Categories**.

Importing Categories to Current Account

To import the categories to the current account, follow the steps:

1. Go to **Operational Menu** > **Price Book** and then click **Categories**.
2. Go to **DRAFTS** and create a new draft. For details, see Working with Drafts List.
3. Import categories to the draft from any of the available data sources:

   > For more information on importing data to the draft, see Importing Data to Draft.

   - **Account Price Book**
   - **GateKeeper** - for more details, see Importing Data from GateKeeper.
   - **Drafts**
   - **From File**

   > For more information on working with the data sources, see Importing Data from Different Sources.

4. Copy the draft's data to any of the current account's locations. For details, see Exporting Draft Data.

   > The categories are configured on the account level. So, in case the categories are exported to any location, the categories of the whole account are updated automatically as well.

5. Make sure the categories are copied successfully. Go to CSO main menu and then click **Price Book** > **Categories**.

Exporting Categories from Current Account to a File

To export the categories from the current account to a file, follow the steps:

1. Go to **Operational Menu** > **Price Book** and then click **Categories**.
2. Go to **DRAFTS** and create a new draft. For details, see Working with Drafts List.
3. Import categories to the draft from the **Account Price Book** source.
   For details, see Importing Data to Draft, Import Item Tags or Promotions from Account Price Book.
4. Export the categories from the draft to a file. For details, see Exporting Draft Data.

Managing Account Categories

You can manage the account categories in the draft and then save this draft to any location to apply changes to the whole account.
For more information on how to update categories in the draft, see Editing Draft Manually.

Preparing a File for Data Import

You can use CSV or XLSX files to import data about Price Book categories and work with them in the Import Tool. In the file, you must provide data for all categories whose data you want to import. Each line in the file contains data for a separate Price Book category. Each entry in the line corresponds to a specific category field, and each comma indicates where one entry ends and another entry begins.

Categories.csv

```
"Number","Name","Source","Description","Min Stock","Category Number","Don't Calculate GPM","Item Group Reconciliation","Reject Promotions","GL #","Accept Incomplete Retail Invoices","GL Department #","PDI Report ID","CMA","GL COG #","Exclude From Full Inventory"
"1","Cigarettes","Account: Greyhound","National And Generic (Single Packs & Cartons)","3","","N","N","Y","","N","","","N","","Y"
"2","Tobacco","Account: Greyhound","Chewing Tobacco, Cigarette Papers, Cigars, Pipe Tobacco, Snuff","3","","N","N","N","","N","","","N","","Y"
"3","Dairy","Account: Greyhound","Canned Whipped Topping, Cottage Cheese,Fluid Milk,Fresh Chip Dip,Fresh Whipping Cream,Half-N-Half, Orange Juice,Sour Cream,Yogurt,(Items Typically Provided by Dairies)","1","","N","N","N","","N","","","N","","Y"
"4","Ice Cream","Account: Greyhound","Ice Cream,Ice Milk, Sherbet, All frozen Novelties Such as Popsicles, Sundae Cups, Fudgesicles, Etc.(Note: Soft Ice Cream or Frozen Yogurt Dispensed From A Machine Should Not Be Included in This Department)","3","","N","N","N","","N","","","N","","Y"
```

The file that you use for import of categories data must have the following structure. Non-mandatory fields can be omitted.

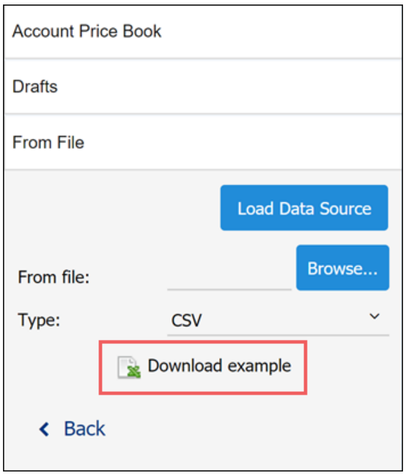
Field Name	Mandatory (Yes/No)	Description
Number	Yes	Unique category ID.

Field Name	Mandatory (Yes/No)	Description
Name	Yes	Category name that appears on C-Store Office forms.
Source	No	Source of record, can contain custom text or be left empty.
Description	No	Category description.
Min Stock	No	Minimum quantity of items in stock.
Category Number	No	Custom category number.
Don't Calculate GPM	No	Flag that allows a user to exclude items from store GPM calculation. Possible values: - 1 - Yes - 0 - No
Item Group Reconciliation	No	ID populated automatically, obtained from the **Inventory Item Group Reconciliation** form for high risk items due to shortage.
Reject Promotions	No	Flag that allows a user to reject promotions for this category. Possible values: - 1 - Yes - 0 - No
GL #	No	Mapping to the General Ledger number.
Accept Incomplete Retail Invoices	No	Flag that allows a user to accept incomplete invoices for items. Possible values: - 1 - Yes - 0 - No
GL Department #	No	Mapping to the General Ledger department number.
PDI Report ID	No	Identifier used for PDI Daily Export.
CMA	No	Flag indicating that the cost method of accounting must be applied to the category. Possible values: - 1 - Yes - 0 - No
GL COG #	No	Mapping to the General Ledger Cost Of Goods number.
Exclude From Full Inventory	No	Flag that allows a user to exclude ingredient items from RMA inventory calculation. Possible values: - 1 - Yes - 0 - No

File Template

To construct a file for import, you can use a template provided by Petrosoft. To get the template and prepare the file, follow the steps:

1. In the Import Tool, on the **Data Sources** panel, select **From file**.
2. Click the **Download example** link.



3. The downloaded file is provided in the XLSX format:
   - On the **Fields Description** tab, get information about every entry that must be filled in the file.
   - On the **csvCategoriesDatasourceTemplate** tab, fill data for the categories that you want to import.
4. Once the file is ready, switch to the **csvCategoriesDatasourceTemplate** tab and save the file in the CSV or XLSX format.
   Result: You can use the saved file for import.

Working with Price Book Departments

With the Import Tool, you can perform the following operations with the departments:

- Copy the Price Book departments between accounts
- Import departments to the current account from the following data sources:
  - Account Price Book
  - GateKeeper (for more details, see Importing Data from GateKeeper).
  - Location Cash Register
  - Drafts
  - File (for more details, see Preparing a File for Data Import)

- Export departments from the current account to a file
- Manage the account's departments

Copying Departments between Accounts

To copy the Price Book departments using the Import Tool, follow the same steps as for copying categories but for departments. For details, see Copying Categories between Accounts.

> Please note that the departments are configured on the account level. So, in case the departments are exported to any location, the departments of the whole account are updated automatically as well.

Importing Departments to Current Account

To import the departments to the current account, follow the steps:

1. Go to **Operational Menu** > **Price Book** and then click **Departments**.
2. Go to **DRAFTS** and create a new draft. For details, see Working with Drafts List.
3. Import departments to the draft from any of the available data sources:

   > For more information on importing data to the draft, see Importing Data to Draft.

   - **Account Price Book**
   - **GateKeeper** - for more details, see Importing Data from GateKeeper.
   - **Location Cash Register**

   > Please note that you may need to adjust in the draft's table the names of the departments imported from the Location Cash Register as the names of the departments in the cash registers can be too long for the price book.

   - **Drafts**
   - **From File**

   > For more information on working with the data sources, see Importing Data from Different Sources.

4. Copy the draft's data to any of the current account's locations. For details, see Exporting Draft Data.

   > The departments are configured on the account level. So, in case the departments are exported to any location, the categories of the whole account are updated automatically as well.

Exporting Departments from Current Account to a File

To export the departments from the current account to a file, follow the steps:

1. Go to **Operational Menu** > **Price Book** and then click **Departments**.
2. Go to **DRAFTS** and create a new draft. For details, see Working with Drafts List.
3. Import departments to the draft from the **Account Price Book** source.
   For details, see Importing Data to Draft, Import Item Tags or Promotions from Account Price Book.
4. Export the departments from the draft to a file. For details, see Exporting Draft Data.

Managing Account Departments

You can manage the account departments in the draft and then save this draft to any location to apply changes to the whole account. For more information on how to update the departments in the draft, see Editing Draft Manually.

Preparing a File for Data Import

You can use CSV or XLSX files to import data about Price Book departments and work with them in the Import Tool. In the file, you must provide data for all departments whose data you want to import. Each line in the file contains data for a separate Price Book department. Each entry in the line corresponds to a specific department field, and each comma indicates where one entry ends and another entry begins.

Departments.csv

```
"Number","Name","Source","Description","Min Price","Max Price","Default Price","Matched Category ID","Matched Category","Department Type ID","Department Type","Income ID","Income","Tax1","Tax2","Tax3","Tax4","Min Age","Food Stamp Allowed","Neg","Blue Laws","Blue Laws2","IMoA","Default Sales Qty","Product Code","Check H.ID","Ma Category"
"1","Tobacco","Account: Greyhound","Tobacco2","0.34","75.00","0.00","2","Tobacco","0","Store","0","","N","N","N","N","18","N","N","N","N","N","1","","1",""
"2","Juices","Account: Greyhound","Juices","0.01","20.00","0.00","6","Juices","0","Store","0","","N","N","N","N","17","Y","N","N","N","N","1","","1",""
"3","Candy","Account: Greyhound","Candy","0.01","20.00","0.00","23","Candy","0","Store","0","","N","N","N","N","0","Y","N","N","N","N","1","","0",""
```

The file that you use for import of departments data must have the following structure. Non-mandatory fields can be omitted.

Field Name	Mandatory (Yes/No)	Description
Number	Yes	Unique department ID.
Name	Yes	Department name.
Source	No	Source of record, can contain custom text or be left empty.
Description	No	Department description.
Min Price	No	Minimum price amount that must be applied to direct sales at the cash register.

Field Name	Mandatory (Yes/No)	Description
Max Price	No	Maximum price amount that must be applied to direct sales at the cash register.
Default Price	No	Default price amount that can be applied to direct sales at the cash register.
Matched Category ID	No	Category ID that must be connected with the department.
Matched Category	No	Category name that must be connected with the department.
Department Type ID	No	Department type code. Possible Values: - 0 = Store - 1 = Fuel - 2 = Car Wash - 3 = Not for Sale - 4 = Money Orders - 5 = Lottery Instant Sales - 6 = Lottery Instant Payouts - 7 = Lottery Online Net Sales - 8 = Other Income
Department Type	No	Text representation of the department type, works in pair with the Department Type ID and must have a text value equal to a code or be left blank. The following values allowed: - Store - Fuel - Car Wash - Not for Sale - Money Orders - Lottery Instant Sales - Lottery Instant Payouts - Lottery Online Net Sales - Other Income
Income ID	No	ID of income type. Allows a user to save income type from the file to the system list.
Income	No	Name of income type. Allows a user to save the income type name from the file to the system list.
Tax1	No	Flag that allows a user to apply Tax 1 to items at the cash register. Possible values: - "1" - tax is applied

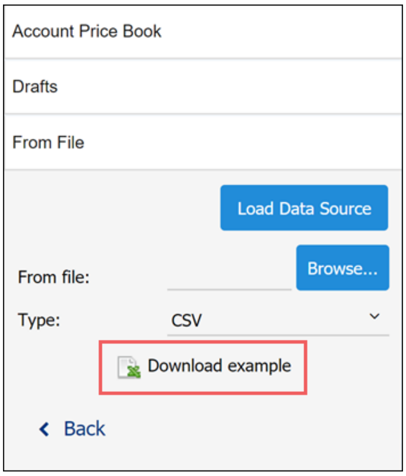
Field Name	Mandatory (Yes/No)	Description
		- "0" - tax is not applied
Tax2	No	Flag that allows a user to apply Tax 2 to items at the cash register. Possible values: - "1" - tax is applied - "0" - tax is not applied
Tax3	No	Flag that allows a user to apply Tax 3 to items at the cash register. Possible values: - "1" - tax is applied - "0" - tax is not applied
Tax4	No	Flag that allows a user to apply Tax 4 to items at the cash register. Possible values: - "1" - tax is applied - "0" - tax is not applied
Min Age	No	Minimum customer's age that is required to sell items.
NCR Sales Restriction Code	No	Specific for NCR (National Cash Register) sales restriction code. Possible values: - Prompt for price Tender 1 Restricted Tender 2 Restricted Tender 3 Restricted Tender 4 Restricted Tender 5 Restricted Tender 6 Restricted Tender 7 Restricted Tender 8 Restricted Tender 9 Restricted Non-discountable Non-lockable No Price Overrides
Food Stamp Allowed	No	Flag that allows a customer to use food stamps as a method of payment. Possible values: - "1" - allowed - "0" - not allowed
Neg	No	Flag that allows a user to set up the item price as payout from the cash register (for example, Lottery payments to the customer).

Field Name	Mandatory (Yes/No)	Description
Blue Laws	No	Allows a user to manage flags at the cash register. Indicates the rule applied: - "0" - No - "1" - Yes
Blue Laws2	No	
CMA	No	Flag that indicates the cost method of accounting for the department. Possible values: - "0" - No - "1" - Yes
Default Sales Qty	No	Default sales quantity for the item.
Product Code	No	Product code for this department that is sent to the cash register. Applies to locations selected on export.
Check H.ID	No	Sign indicating that it is necessary to verify the buyer's ID before the sale. Possible values: - "1" - Yes - "0" - No
Ma Category	No	Department Matched Category

File Template

To construct a file for import, you can use a template provided by Petrosoft. To get the template and prepare the file, follow the steps:

1. In the Import Tool, on the **Data Sources** panel, select **From file**.
2. Click the **Download example** link.



3. The downloaded file is provided in the XLSX format:

- On the **Fields Description** tab, get information about every entry that must be filled in the file.
- On the **csvDepartmentsDatasourceTemplate** tab, fill data for the departments that you want to import.

4. Once the file is ready, switch to the **csvDepartmentsDatasourceTemplate** tab and save the file in the CSV or XLSX format.
   Result: You can use the saved file for import.

Working with Price Book Items

With the Import Tool, you can perform the following operations with the items data:

- Copy the Price Book items between accounts
- Import items to a station (location) from the following sources:
  - Account Price Book
  - Location Price Book
  - Location Cash Register
  - GateKeeper
  - Drafts
  - Handheld
  - File

  For more details, see Preparing a File for Data Import.

- Monitor and adjusting the taxonomy settings of exported items
- Export items to a file
- Manage the account's items
- Prepare file with items for importing
- Import the Price Book items with parent-child relations
- Import linked items
- Delete PLU from the imported items in bulk

Copying Price Book Items Between Accounts

To copy Price Book items between accounts:

1. At the top right of the page, switch to the account you want to import Price Book items from.
2. Import Price Book items from the source account to the draft.

There are item attributes configured on the station (location) level. For example, Current Retail, On Hand and so on. So, when you are importing items from the Account Price Book, the station (location) item attributes are not imported.
To view the whole list of the station (location) item attributes, see **Items** > **Items Setup** > **Station Item Attributes** at Petrosoft Cloud help.

3. In the top right corner of the page, switch to the account you want to export Price Book items to.
4. Copy Price Book items from the saved draft to any location of the destination account. For details, see Exporting Draft Data to Location.

Importing Items to a Station (Location)

Maximum number of records containing items imported at once is *100 000*.

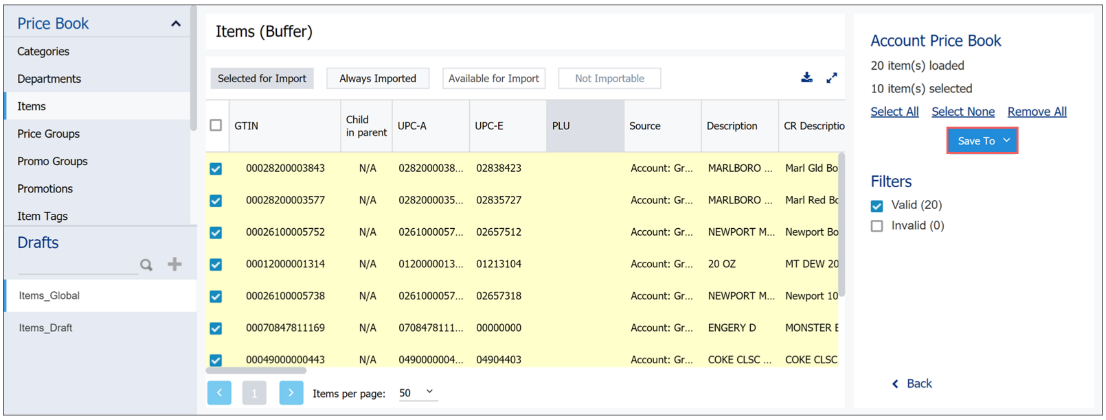
To import items to a station (location):

1. Import items from a source to the draft:
   a. Go to **Operational Menu** > **Price Book** and then click **Items**.
   b. Go to **DRAFTS** and create a new draft.
   c. Go to **Data Sources Panel** and then click the **Add More** button.
   d. Expand any source section.
   e. Select all criteria for uploading items.

   For more information on how to import Price Book items from the CSV or XLSX file, see Importing Data From File.

   f. Click the **Load Data Source** button.
   g. Wait until all items are uploaded to the **Items (Buffer)** table.
   h. Select the items you want to import:
      - To select all items, click **Select All**.
      - To deselect all items, click **Select None**
      - Item's parent or child items are selected or deselected together with the item. To select or deselect item's parent or child items separately from the item, in the **GTIN** column, click the plus sign for this item.

   i. Save selected items from the buffer to your draft. For details, see Saving Data from Buffer to Draft.



2. Copy the items from the saved draft to one or several locations. For details, see Exporting Draft Data to Location.
3. Make sure the items are copied successfully.
   Go to the **Home Page** > **Items Updates** > and then open the **Updates Manager** for your station (location) you've just imported items in.

Monitoring and Adjusting Taxonomy Settings

In the Import Tool, Price Book items taxonomy is determined by the following Price Book elements:

- Categories
- Departments
- Manufacturers
- Vendors

During exporting Price Book items from the draft to one or several locations, taxonomy settings of the exported items are mapped automatically with those of the items that already exist on the location or account.

You can also monitor and adjust items taxonomy settings when importing item tags, promotions or vendors, in case they contain items. For details, see the following sections:

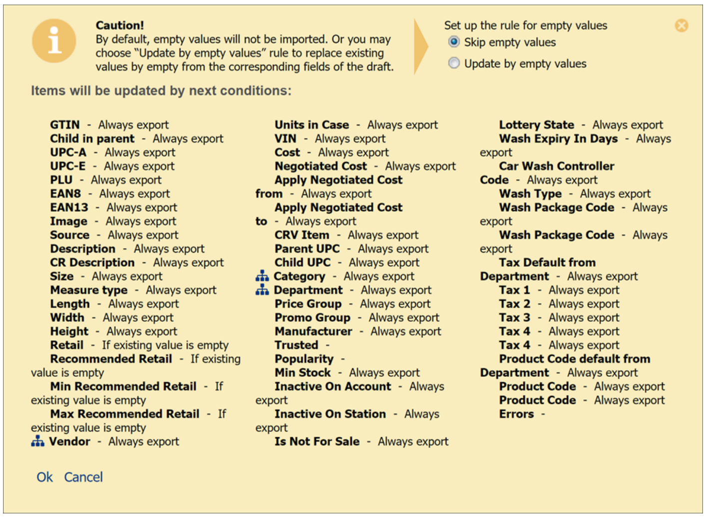
- Monitoring and Adjusting Items Taxonomy when Importing Item Tags
- Monitoring and Adjusting Items Taxonomy when Importing Promotions
- Monitoring and Adjusting Items Taxonomy when Importing Vendors

To view the automatic mapping results, in the draft table, select the items you want to export and then click the **Save To** button.

For more information on how to export items from draft to location, see Exporting Draft Data to Location.

You can perform the following activities using the mapping results form:

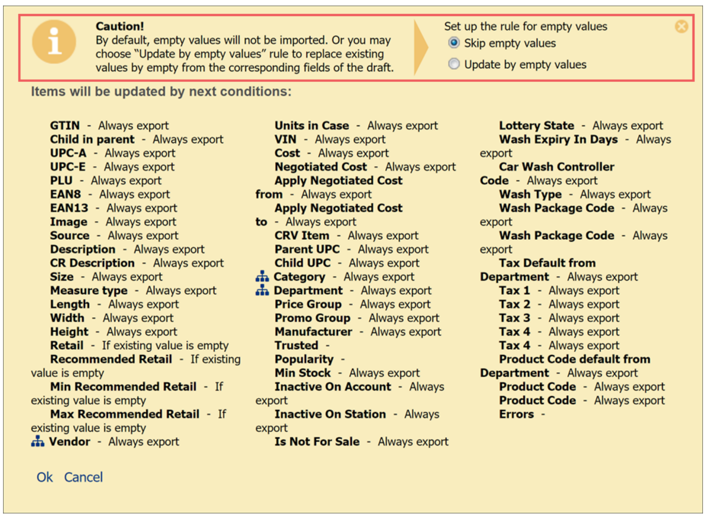
- Select the export rule for empty values
- View automatic mapping statuses
- View the mapping table



Empty Values Export Rule

If the draft contains fields with empty values, you can specify how these values must be processed during export. At the top of the mapping results form, select the rule by which empty values must be exported:

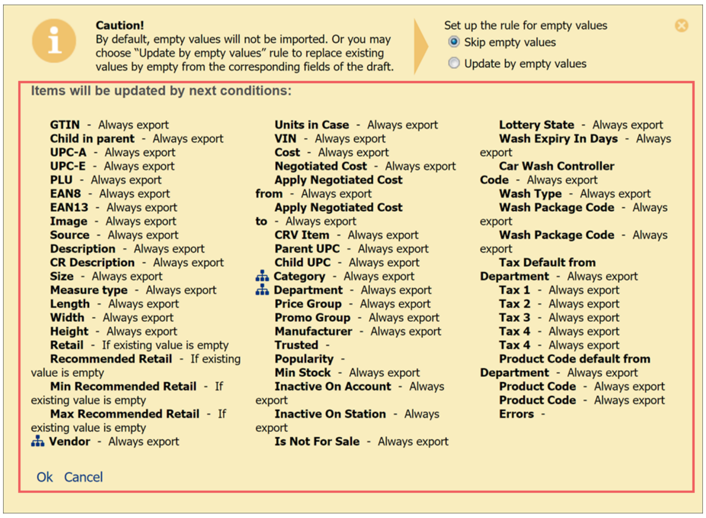
- **Skip empty values**: select this option if you do not want to export empty values to the destination. This option is selected by default.
- **Update by empty values**: select this option if you want to replace existing values in the destination with empty values exported from the source.



Automatic Mapping Statuses

On the left of each taxonomy element, you can view a special icon, indicating the following mapping statuses:

- Blue icon: all taxonomy elements fully coincide with each other.
- Yellow icon: all taxonomy elements coincide with each other, while some of them have just partial match by name.
- Red icon: at least one element in this taxonomy group was not mapped.



Mapping Table

In the mapping table, you can adjust the taxonomy settings with yellow and red icons. For each element in the **Source** column, select the corresponding element in the account column from the list of available elements.

Exporting Items to a File

To export the Price Book items to a file:

1. Go to **Operational Menu** > **Price Book** and then click **Items**.
2. Go to **DRAFTS** and create a new draft.
3. Import the items to the draft from any of the available data source.

For details, see Importing Data to Draft.

4. Export the items from the draft to a file. For details, see Exporting Draft Data.

Managing Account Items

You can manage the account items in the draft and then save this draft to any location to apply changes to the whole account. For more information on how to manage items in the draft, see Editing Draft Manually.

In case you need to update only some attributes of the items, before exporting, make sure the columns of the draft's table with these attributes only are selected. For details, see Editing Draft Manually > **Adding or Removing Columns for Exporting**.

Preparing a File for Data Import

You can use CSV or XLSX files to import data with the Price Book items and work with them in the Import Tool. In the file, you must provide data for all items whose data you want to import. Each line in the file contains data for a separate Price Book item. Each entry in the line corresponds to a specific item field, and each comma indicates where one entry ends and another entry begins.

Items(Items)_04-04-2019_16_04_37.csv

```
1 "SKU","SKU Type","Upca","Upce","PLU","Ean8","Ean13","Source","Linkable","Description","CR Description","Size","Measure Type","Length","Width","Height","Retail","Recommended Retail","Min Recommended Retail","Max Recommended Retail","Vendor ID","Vendor","Units in Case","VIN","Cost","Negotiated Cost","Negotiated Cost Apply From Date","Negotiated Cost Apply To Date","CRV Item","Child in parent","Parent SKU","Child SKU","Category ID","Category","Department ID","Department","Manufacturer ID","Manufacturer","Trusted_index","Popularity_index","Min Stock","Price Group","Promo Group","Inactive On Account","Inactive On Station","Is Not For Sale","Lottery State ID","Lottery State","Wash Expiry In Days","Car Wash Controller Code","Wash Type","Wash Package Code","Tax default from Department","Tax 1","Tax 2","Tax 3","Tax 4","Product Code default from Department","Product Code","Errors"
2 "02838423","1","028200003843","00283842","0","","","Account: Greyhound","0","MARLBORO GOLD PK BOX FSC","MARLBORO GOL","PK","piece","0","0","0","","","","","","","","","","","0000-00-00","0000-00-00","","","","","1","Cigarettess","201","CIGARETTES PREM","159","Philip Morris USA/Tobacco Products","8","8","","Camel Packs_Test","Marlboro Mainline","0","","0","0","","0","0","0","0","0","0","0","0","0","0","",
3 "02657512","1","026100005752","00265751","0","","","Account: Greyhound","0","NEWPORT BOX FSC","NEWPORT BOX","PK","piece","0","0","0","0.00","0.00","0.00","0.00","","","","","","","0000-00-00","0000-00-00","","","","","1","Cigarettess","201","CIGARETTES PREM","146","Lorillard Tobacco Company","8","4","","","","0","1","0","0","","0","0","0","0","0","0","0","0","0","0","",
4 "02657318","1","026100005738","00265731","0","","","Account: Greyhound","0","NEWPORT BOX 100 FSC","NEWPORT BOX","PK","piece","0","0","0","0.00","0.00","0.00","0.00","","","","","","","0000-00-00","0000-00-00","","","","","1","Cigarettess","201","CIGARETTES PREM","146","Lorillard Tobacco Company","8","4","","","","0","1","0","0","","0","0","0","0","0","0","0","0","0","0","",
5 "01213104","1","012000001314","00121310","0","","","Account: Greyhound","0","MT DEW 20OZ","MT DEW 20OZ","20 OZ","weight","0","0","0","","","","","","","","","","","0000-00-00","0000-00-00","","","","","12","Soft Drinks 111","9","Soda","37","Pepsi-Cola North America Inc.","8","4","","Pepsi  & Mt Dew20oz $1.99","MtDew Family 20oz","0","","0","0","","0","0","0","0","0","0","0","0","0","0","",
```

To construct a file for import, you can use a template provided by Petrosoft. For details, see Downloading a File Template.

The file that you use for import of items data must have the following structure. Non-mandatory fields can be omitted.

If you need to import the items with the parent-child relations or linked items, see the file structure in the corresponding sections Importing the Items with Parent-Child Relations and Importing Linked Items.

Field Name	Mandatory (Yes/No)	Description
SKU	Yes	Item code in one of supported formats: - PLU - UPCA - UPCE - EAN8 - EAN13 - GTIN
SKU Type	Yes	SKU code type for the SKU code in the previous field. Possible values: - 0: UPCA - 1: UPCE - 2: EAN8 - 3: EAN13 - 4: PLU - 5: GTIN
Description	Yes/No	Item name as it appears in the C-Store Office Price Book. This field is required if the **CR Description** value is not provided.
CR Description	Yes/No	Item name as it appears at the cash register and in customer receipts. Must be no longer than 20 symbols. Longer values will be cropped. This field is required if the **Description** value is not provided.
Size	No	Item size and units of measurements, for example: 20 oz.
Measure Type	No	Type of measurement units. Provided for QwickServe. Possible values: - **Piece** - **Weight** - **Volume**
Length	No	Length of the item pack.
Width	No	Width of the item pack.
Height	No	Height of the item pack.
Prompt for Price	No	Ability to ask and assign any price on Cash Register. Possible values: - **Y**: If the Prompt for Price check-box must be filled. - **N**: If the Prompt for Price check-box must not be filled. - **Empty**: If the Prompt for Price check-box must NOT be filled.
Retail	No	Retail price for the item.
Recommended Retail	No	Recommended retail price for the item.
Min Recom-	No	Minimum recommended retail price for the item.

Field Name	Mandatory (Yes/No)	Description
mended Retail		
Max Recom-mended Retail	No	Maximum recommended retail price for the item.
Vendor ID	No	Vendor identifier in C-Store Office.
Vendor	Yes/No	Vendor name for the specified Vendor ID. The field is required if the **Cost** or **Negotiated Cost** values are provided.
Units in Case	No	How many item units are available in a case. Is used for invoices.
VIN	No	Item code assigned by the vendor.
Cost	No	The last invoice cost.
Negotiated Cost	No	Standard item cost for Vendor ID, may be configured as postpone cost change if combined with the next two fields.
Apply Nego-tiated Cost from	No	Date when the postpone negotiated cost will be applied, for example, 2017-12-23. The date format is YYYY-mm-dd.
Apply Nego-tiated Cost to	No	Date when the negotiated cost will be removed. The date format is YYYY-mm-dd.
Category ID	No	Category ID in C-Store Office.
Category	No	Category name for the specified Category ID.
Department ID	No	Department ID in C-Store Office.
Department	No	Department name for the specified Department ID.
Price Group ID	No	Price Group ID in C-Store Office.
Price Group	No	Price Group name for the specified Price Group ID.
Promo Group ID	No	Promo Group number in C-Store Office.
Promo Group	No	Promo Group name for the specified Promo Group ID.
Manufacturer ID	No	Manufacturer ID in C-Store Office.
Manufacturer	No	Manufacturer name for the specified Manufacturer ID.
Is Recipe Item	No	Flag to mark the item as a QwickServe recipe item. Possible values: - 1: Yes - 0: No
Is Ingredient Item	No	Flag to mark the item as a QwickServe ingredient. Possible values: - 1: Yes - 0: No
Min Stock	No	Minimum quantity of items in stock.

Field Name	Mandatory (Yes/No)	Description
Inactive on Account	No	Flag to mark the item as inactive at the account level. Possible values - 1: Yes - 0: No
Inactive on Station	No	Flag to mark the item as inactive at the station (location) level. Possible values - 1: Yes - 0: No
Is Not For Sale	No	Flag to mark the item as not for sale. Possible values - 1: Yes - 0: No
Lottery State ID	No	Lottery state: state code specified in C-Store Office.
Lottery State	No	Lottery state name for the specified Lottery State ID.
Wash Expiry In Days	No	For car wash items: number of days for which the wash code is valid (numeric value).
Car Wash Controller Code	No	For car wash items: car wash controller code (numeric value).
Wash Type	Yes/No	For car wash items: type of the car wash item (varchar value). Mandatory for Bulloch cash registers if values provided for at least one of the fields are dedicated to Car Wash items.
Wash Package Code	Yes/No	For car wash items: wash package code (varchar value). Mandatory for Bulloch cash registers if values provided for at least one of the fields are dedicated to Car Wash items.
Car Wash Sales Location	No	For Car Wash items: car wash sales location. Possible values: - **BOTH**: the item is available for sale in the store and on a pump . - **INSIDE**: the item is available for sale in the store only. If this field is left empty, the default value BOTH will be applied by the system.
CRIND Car Wash Position on Screen	No	This field is applicable only for the Car Wash items. Possible values: - **1**, **2**, or **3**: Enter one of these digits, to define the item position on the CRIND screen. - **Empty**: Leave this field empty, if you don't need to display the Car Wash item on the CRIND screen.
Radiant Item Type	No	Item type at the Radiant CR. The field is mandatory for Radiant cash registers. Possible values: - Merchandise

Field Name	Mandatory (Yes/No)	Description
		- Condiments - Combos - Category Sale - Instant Ticket Lottery - Machine Ticket Lottery - Money Order - Container Deposit - SVC Activation - SVC Reload - Prepared - Car Wash. Controller 1 - Car Wash. Controller 2 - Car Wash. Controller 3 - Car Wash. Controller 4 - Car Wash. Controller 5 - Car Wash. Controller 6 - Car Wash. Controller 7 - Car Wash. Controller 8 - Car Wash. Controller 9 If this field is left empty, the default value Merchandise will be applied by the system.
Bulloch Item Number	Yes	Defines the item number for Bulloch cash registers. Possible values: - **1-13**: Enter the number of Bulloch POS machines installed on your account. - **Empty**: Leave this field blank, in case there are no Bulloch POS machines installed on your account.
Tax Default from Department	No	Flag to indicate if taxes for the item should be taken from the department taxes for the station (location). Possible values: - 1: Yes - 0: No The default value is 1. The field value should not be set to 1 if at least one of the following four fields (Tax 1-Tax 4) has the 1 value.
No Taxes	No	Flag to indicate that an item is tax-free. Possible values: - 0: The item is taxable - 1: The item is tax-free Must not be 1 if at least one of the following five fields (Tax 1-Tax 4 and Tax Default from Department) has value 1

Field Name	Mandatory (Yes/No)	Description
		Must not be 0 if all of the following five fields (Tax 1-Tax 4 and Tax Default from Department) has the value 0.
Tax 1	No	Flag to indicate if tax 1 is applied for the item. Possible values: - 1: yes - 0: no The default value is 0.
Tax 2	No	Flag to indicate if tax 2 is applied for the item. Possible values: - 1: yes - 0: no The default value is 0.
Tax 3	No	Flag to indicate if tax 3 is applied for the item. Possible values: - 1: yes - 0: no The default value is 0.
Tax 4	No	Flag to indicate if tax 4 is applied for the item. Possible values: - 1: yes - 0: no The default value is 0.
Product Code default from Department	No	Flag to indicate if the product code for the item should be taken from the department's product code set for the station. Possible values: - 1:yes - 0: no The default value is. The field value should not be set to 1 if the **Product Code** field contains any value (not empty).
Product Code	No	Product code value.

Please note that the car wash settings are supported only by certain cash registers. For details, see Car Wash Items: Compatible Cash Registers.

Use the following recommendations to fill a file with items data:

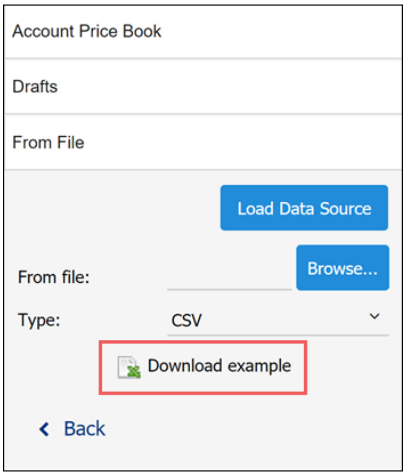
- You can add items data to the file in any order.
- In case you miss some items data stated in the template, you can remove the corresponding columns from the file.
- The names of the columns in the file must be exactly the same as in the template.

- In case the categories and departments already exist on your account, it is possible to add only IDs of these categories and departments to the file. You can use it if you are going to export the items from the file to your current account only (not to other accounts).

Downloading a File Template

To get the template and prepare the file:

1. In the Import Tool, on the **Data Sources** panel, select **From file**.
2. Click the **Download example** link.



3. The downloaded file is provided in the XLSX format:
   - On the **Fields Description** tab, get information about every entry that must be filled in the file.
   - On the **csvItemsDatasourceTemplate** tab, fill data for the items that you want to import.
4. Once the file is ready, switch to the **csvItemsDatasourceTemplate** tab and save the file in the CSV or XLSX format.
   Result: You can use the saved file for import.

Importing Items with Parent-Child Relations

The procedure for importing items from the file is described in the Importing Items to a Station (Location) section.

A file for parent-child items has the same format as the one used for regular items import. The file of such type allows you to:

- Import links only.
- Import both links and items with all parameters.

The file structure used for the regular items import is described in the Preparing a File for Data Import section.

If items already exist on the account and it is needed to import only links between them, you can use only the next fields for the file:

Field Name	Mandatory (Yes/No)	Description
SKU	Yes	Item code in one of supported formats: - PLU - UPCA - UPCE - EAN8 - EAN13 - GTIN
SKU Type	Yes	SKU code type for the SKU code in the previous field. Possible values: - 0: UPCA - 1: UPCE - 2: EAN8 - 3: EAN13 - 4: PLU - 5: GTIN
Description	Yes/No	Item name as it appears in the C-Store Office Price Book. This field is required if the **CR Description** value is not provided.
CR Description	Yes/No	Item name that will appear at the cash register and in customer receipts. Must be no longer than 20 symbols. Longer values will be cropped. This field is required if the **Description** value is not provided.
Child in parent	Yes/No	How many child items are included in one parent item. This field is required only for child items.
Parent SKU	Yes/No	Parent item SKU without a check digit. This field is required only for child items.
Child SKU	Yes/No	Child item SKU without a check digit. This field is required only for parent items. If one parent has multiple child items, a separate parent item record must exist for each child.

The example of a file with parent-child relations between items is shown below.

SKU	Name	Child in parent	Parent SKU	Child SKU
7172030508	Item A			7172000007

SKU	Name	Child in parent	Parent SKU	Child SKU
7172000007	Item B	10	7172030508	1000012677
1000012677	Item C	3	7172000007	1000012667
1000012667	Item D	15	1000012677	
7172030509	Item E			7172000007
7172000007	Item B	2	7172030509	1000012663
1000012663	Item F	5	7172000007	

In this example, items have the following parent-child relations:

- Item A is the parent item of Item B
- Item B has two parent items (Item A and Item E) and two child items (Item C and Item F)
- Item C is the parent item of Item D

Importing Linked Items

The procedure for importing items from the file is described in the Importing Items to a Station (Location) section.

A file for linked items has the same format as the one used for regular items import. The file of such type allows to:

- Import links only
- Import both links and items with all parameters

> The file structure used for the regular items import is described in the Preparing a File for Data Import section.

If items already exist on the account and it is needed to import only links between them, one can use only next fields for the file:

Field Name	Mandatory (Yes/No)	Description
SKU	Yes	Item code in one of supported formats: - PLU - UPCA - UPCE - EAN8 - EAN13 - GTIN
SKU Type	Yes	SKU code type for the SKU code in the previous field. Possible values:

Field Name	Mandatory (Yes/No)	Description
		- 0: UPCA - 1: UPCE - 2: EAN8 - 3: EAN13 - 4: PLU - 5: GTIN
Description	Yes/No	Item name as it appears in the C-Store Office Price Book. This field is required if the **CR Description** value is not provided.
CR Description	Yes/No	Item name that will appear at the cash register and in customer receipts. Must be no longer than 20 symbols. Longer values will be cropped. This field is required if the **Description** value is not provided.
Linkable	Optional	Flag indicating that this item is linkable. Possible values: - 1: Yes - 0: No This field must be populated to transfer linkable items and items to which they are linked.
CRV Item	Optional	Linked item SKU without a check digit. Must be populated for items that have linked items (and the Linkable value is 0).

Deleting PLU from the Imported Items in Bulk

If you need to import a large number of items with PLU codes and after the import, you need the items have the UPC codes instead of PLU, you can do it easily with Import Tool. You can delete the PLU codes from the imported items in bulk first, and then to save the items with automatically generated UPC codes to your location. For details, see the step-by-step procedure below.

1. Prepare the source file for import with the Price Book items.

   > Make sure the SKU Type value in the file equals to 4. For details, see Preparing a File for Data Import.

2. Import the file to the buffer.

   HOW TO IMPORT THE FILE INTO THE BUFFER

   1. Go to **Operational Menu** > **Price Book** and then click **Items**.
   2. Go to **Drafts** and create a new draft. For details, see Working with Drafts List.
   3. Go to the **Data Sources Panel** and then click the **Add More** button.
   4. Click **From file** > **Browse** and select the prepared file.

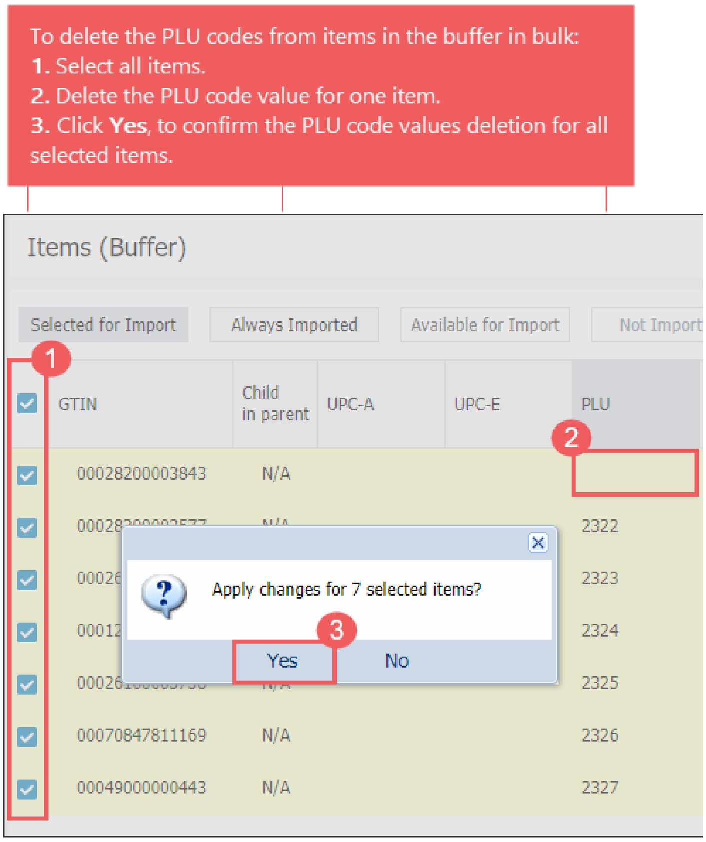
5. Click **Load Data Source**.

> To see the full procedure for importing data from file with, go to the Importing Data from File section.

3. Delete the PLU codes from imported items in bulk.

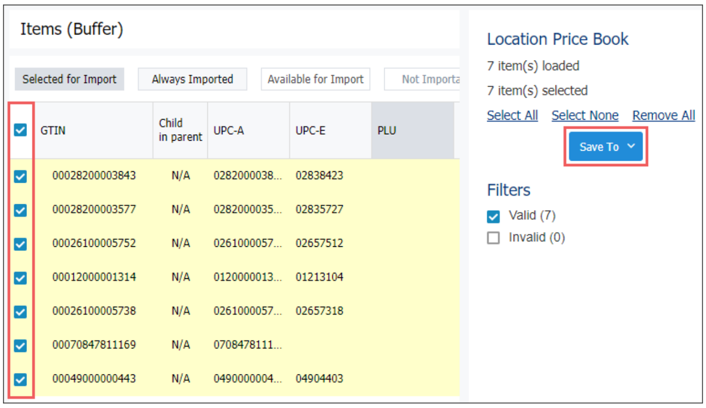
HOW TO DELETE PLU CODES FROM ITEMS IN THE BUFFER IN BULK

1. In the buffer, select all items.
2. In the **PLU** column, delete the PLU code value for one item.
3. Click any empty space on the form.
4. In the confirmation window, click **Yes**, to confirm the PLU code values deletion for all selected items.



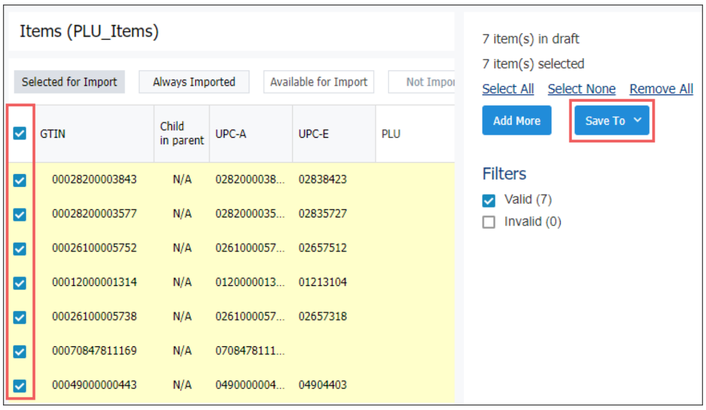
Result: The PLU codes are deleted. The UPC codes are generated automatically by the system.

4. Select all items and click **Save To**, to save the items to the draft.



By default, all selected items are saved to the current draft. If you want to change the draft, to the right of the **Save To** button, click the drop down arrow, select the draft you need, and then click **Save To**.

5. Go to **Operational Menu** > **Price Book** and then click **Items**.
6. Go to **Drafts** and select the draft to which you saved the items from the buffer.
7. Select all items in the draft and export them to your location.
   a. To the right of the **Save To** button, click the drop down arrow and select the location.
   b. Click the **Save To** button.



To see the full procedure for exporting items from the draft to a location, go to the Exporting Draft Data to a Location section.

Working with Price Book Price Groups

With the Import Tool, you can perform the following operations with the price groups:

- Import price groups to a location from the following data sources:
  - Account Price Book

  - Location
  - Drafts
  - File (for more details, see Preparing a File for Data Import)
- Export price groups from the current account to a file.
- Manage the price groups.

Importing Price Groups to Station (Location)

To import the price groups to a station (location), follow the steps:

1. Go to **Operational Menu** > **Price Book** and then click **Price Groups**.
2. Go to **DRAFTS** and create a new draft.
3. Import price groups to the draft from any of the available data sources:

   For more information on importing data to the draft, see Importing Data to Draft.

   - **Account Price Book** - use this data source in case you need to import the price groups of the current account without the retail prices.
   - **Location** - use this data source in case you need to import the price groups from a specific location with the retail prices.
   - **From File** - use this data source in case you have a file in CSV or XLSX format with the price groups data.
4. Copy the draft's data to any of the current account's locations. For details, see Exporting Draft Data.
5. Make sure the price groups are copied successfully.
   Go to CSO main menu and then click **Price Book** > **Price Groups**.

Exporting Price Groups from Current Account to a File

To export the price groups from the current account to a file, follow the steps:

1. Go to **Operational Menu** > **Price Book** and then click **Price Groups**.
2. Go to **DRAFTS** and create a new draft.
3. Import the price groups to the draft from the **Account Price Book** source.
   For details, see Importing Data to Draft.
4. Export the price groups from the draft to a file. For details, see Exporting Draft Data.

Managing Price Groups

You can manage the price groups in the draft and then save this draft to any location on the current account. For more information on how to update the price groups in the draft, see Editing Draft Manually.

Preparing a File for Data Import

You can use CSV or XLSX files to import data about price groups and work with them in the Import Tool. In the file, you must provide data for all price groups whose data you want to import. Each line in the file contains data for a separate price group. Each entry in the line corresponds to a specific price group field, and each comma indicates where one entry ends and another entry begins.

PriceGroups.csv

```
"Number","Name","Retail price","Reconciliation","Ignore fixed retail"
"3","PALL MALL FILTER","0.00","N","N"
"4","Misty","0.00","N","N"
"7","Misty Carton $70.99","0.00","N","N"
"8","Subgeneric Carton $51.89","0.00","N","N"
```

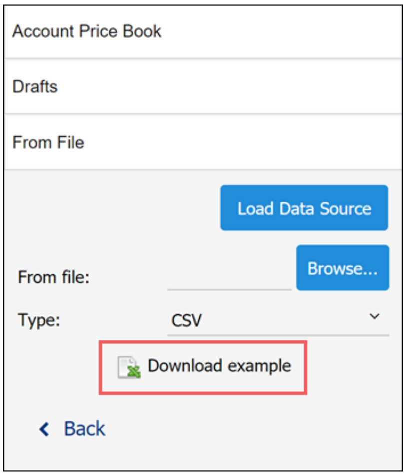
The file that you use for import of price groups data must have the following structure. Non-mandatory fields can be omitted.

Field Name	Mandatory (Yes/No)	Description
Number	Yes	Price group number in C-Store Office.
Name	Yes	Price group name in C-Store Office, for example, Pepsi Family 20oz.
Retail price	No	Retail price for the price group at the station or cluster level.
Ignore fixed retail	No	Ignore fixed price flag when updating items for stations. Possible values: - "0" = do not ignore - "1" = ignore
Reconciliation	No	ID populated automatically, obtained from the **Inventory Item Group Reconciliation** form for high risk items due to shortage.

File Template

To construct a file for import, you can use a template provided by Petrosoft. To get the template and prepare the file, follow the steps:

1. In the Import Tool, on the **Data Sources** panel, select **From file**.
2. Click the **Download example** link.



3. The downloaded file is provided in the XLSX format:
   - On the **Fields Description** tab, get information about every entry that must be filled in the file.
   - On the **csvPricegroupsDatasourceTemplate** tab, fill data for the price groups that you want to import.
4. Once the file is ready, switch to the **csvPricegroupsDatasourceTemplate** tab and save the file in the CSV or XLSX format.
   Result: You can use the saved file for import.

Working with Price Book Promo Groups

With the Import Tool, you can perform the following operations with the promo groups:

- Import promo groups to a location from the following data sources:
  - Account Price Book
  - Drafts
  - File (for more details, see Preparing a File for Data Import)
- Export promo groups from the current account to a file.
- Manage the promo groups.

Importing Promo Groups to Station (Location)

To import the promo groups to a station (location), follow the steps:

1. Go to **Operational Menu** > **Price Book** and then click **Promo Groups**.
2. Go to **DRAFTS** and create a new draft.

3. Import promo groups to the draft from any of the available data sources:

   > For more information on importing data to the draft, see Importing Data to Draft.

   - **Account Price Book**
   - **Drafts**
   - **From File**

4. Copy the draft's data to any of the current account's locations. For details, see Exporting Draft Data.
5. Make sure the promo groups are copied successfully.
   Go to CSO main menu and then click **Price Book** > **Promo Groups**.

Exporting Promo Groups from Current Account to a File

To export the promo groups from the current account to a file, follow the steps:

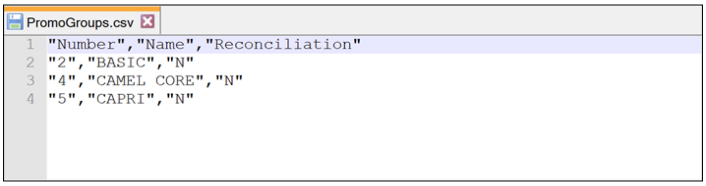
1. Go to **Operational Menu** > **Price Book** and then click **Promo Groups**.
2. Go to **DRAFTS** and create a new draft.
3. Import the promo groups to the draft from the **Account Price Book** source.
   For details, see .
4. Export the promo groups from the draft to a file. For details, see Exporting Draft Data.

Managing Promo Groups

You can manage the promo groups in the draft and then save this draft to any location on the current account. For more information on how to update the promo groups in the draft, see Editing Draft Manually.

Preparing a File for Data Import

You can use CSV or XLSX files to import data about promo groups and work with them in the Import Tool. In the file, you must provide data for all promo groups whose data you want to import. Each line in the file contains data for a separate promo group. Each entry in the line corresponds to a specific promo group field, and each comma indicates where one entry ends and another entry begins.


PromoGroups.csv

```
"Number","Name","Reconciliation"
"2","BASIC","N"
"4","CAMEL CORE","N"
"5","CAPRI","N"
```

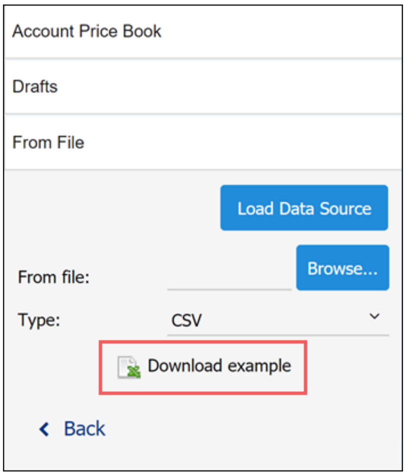
The file that you use for import of promo groups data must have the following structure. Non-mandatory fields can be omitted.

Field Name	Mandatory (Yes/No)	Description
Number	Yes	Unique group ID
Name	Yes	Group name

File Template

To construct a file for import, you can use a template provided by Petrosoft. To get the template and prepare the file, follow the steps:

1. In the Import Tool, on the **Data Sources** panel, select **From file**.
2. Click the **Download example** link.



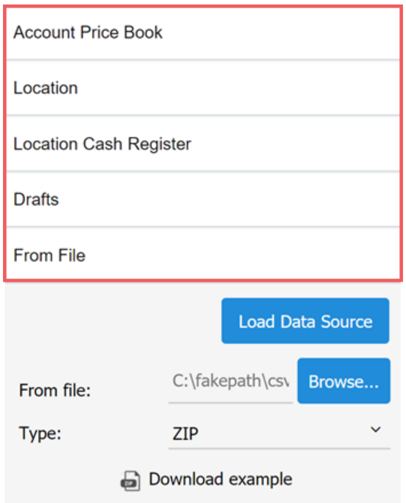
3. The downloaded file is provided in the XLSX format:
    - On the **Fields Description** tab, get information about every entry that must be filled in the file.
    - On the **csvPromogroupsDatasourceTemplate** tab, fill data for the promo groups that you want to import.
4. Once the file is ready, switch to the **csvPromogroupsDatasourceTemplate** tab and save the file in the CSV or XLSX format.
   Result: You can use the saved file for import.

Working with Price Book Promotions

Using the Import Tool, you can perform the following operations with the promotions:

- Importing promotions to a location from the following data sources:
    - Account Price Book
    - Location
    - Location Cash Register

- Drafts
- File (for more details, see Preparing a File for Data Import)



- (Optional) Monitoring and adjusting the taxonomy settings of the imported items within promotions, if any.
- Managing the promotions.
- Preparing files with promotions data for importing.

Importing Promotions to Station (Location)

To import the promotions to a station (location), follow the steps:

1. Go to **Operational Menu** > **Price Book** and then click **Promotions**.
2. Go to **DRAFTS** and create a new draft. For details, see Working with Drafts List.
3. Import promotions from a data source to the draft. Do the following:
   a. Go to **Data Sources Panel** and then click the **Add More** button.
   b. Expand the **Account Price Book** section.

   > For more information on how to import promotions from other data sources, Importing Data to Draft.

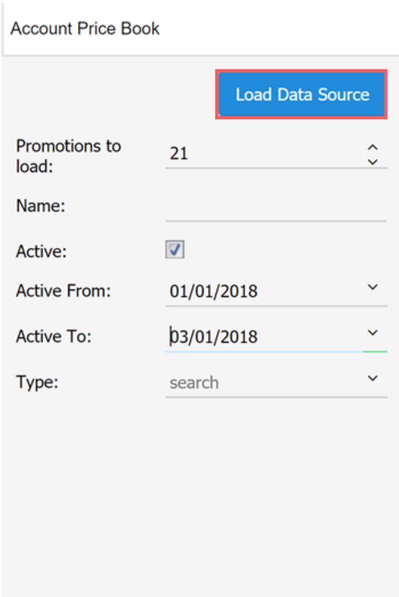
   c. Specify any of the following importing criteria:

   - **Promotions to load** - displays the number of selected Price Book elements to be uploaded to the buffer.

   > To upload less elements, enter your number manually. In this case the most popular and frequently used elements will be uploaded.

- **Name** - enter the symbols the name of the imported data should include.
- **Active** - select this option to upload the data in the 'Active' status only.
- **Active From** - select the promotion starting date.
- **Active To** - select the promotion ending date.
- **Type** - select the promotion type.

d. Click **Load Data Source**.



4. (Optional) Edit imported promotions in the buffer, if needed.

   For each promotion, you can view and select what included departments, promo groups, or items will be saved together with the promotion.

5. Select promotions you need and save them to the draft. For details, see Saving Data from Buffer to Draft.
6. Copy the draft's data to any of the current account's locations. For details, see Exporting Draft Data.
7. Make sure the promotions are copied successfully.

   Go to CSO main menu and then click **Price Book** > **Promotions**.

Monitoring and Adjusting Items Taxonomy when Importing Promotions

If the importing promotions contain items, you can monitor and adjust the following items taxonomy settings during the promotions import:

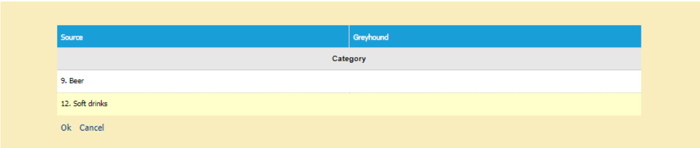
- Categories
- Departments

Items taxonomy settings can be monitored and adjusted during the promotions import, in case the following conditions are met:

- The promotion has just been added to the draft.
- The promotion contains items with undefined category or/and department.

Monitoring Items Taxonomy Settings when Importing Promotions

You can monitor the items taxonomy settings in the mapping table, which appears above the promotions draft, when you are saving promotions from the draft to one or several locations under the above conditions.



Adjusting Items Taxonomy Settings when Importing Promotions

For each element in the **Source** column, select the corresponding element in the account column from the list of available elements.

Managing Promotions

You can manage the promotions in the draft and then save this draft to any location on the current account. For more information on how to update the promotions in the draft, see Editing Draft Manually.

Preparing a File for Data Import

You can use CSV or XLSX files to import data about promotions and work with them in the Import Tool. In the file, you must provide data for all promotions whose data you want to import. Each line in the file contains data for a separate promotion. Each entry in the line corresponds to a specific item field, and each comma indicates where one entry ends and another entry begins.

Together with the promotions data, you import data for the following objects in C-Store Office:

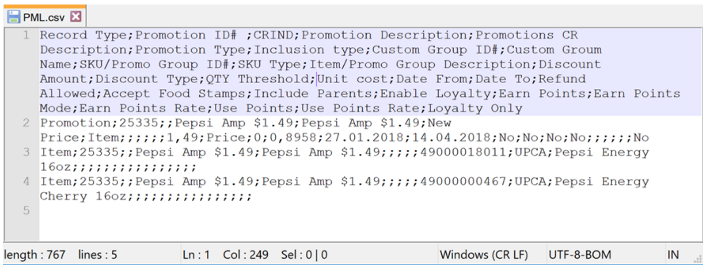
- Items or promo groups linked to promotions
- Buydowns linked to promotions

For promotions data import, the Import tool requires an archive that contains the following files:

- PML.csv: this file contains a list of promotions and links to other objects related to promotions.
- BDL.csv: this file contains a list of buydowns linked to promotions.
- ITL.csv: this file contains a list of items linked to promotions.
- DPL.csv: this file contains a list of departments linked to promotions.
- PGL.csv: this file contains a list of promo groups linked to promotions.

PML File Structure

The PML file describes promotions themselves and links to objects related to promotions, such as items and buydowns.


PML.csv

```
Record Type;Promotion ID# ;CRIND;Promotion Description;Promotions CR Description;Promotion Type;Inclusion type;Custom Group ID#;Custom Groum Name;SKU/Promo Group ID#;SKU Type;Item/Promo Group Description;Discount Amount;Discount Type;QTY Threshold;Unit cost;Date From;Date To;Refund Allowed;Accept Food Stamps;Include Parents;Enable Loyalty;Earn Points;Earn Points Mode;Earn Points Rate;Use Points;Use Points Rate;Loyalty Only
Promotion;25335;;Pepsi Amp $1.49;Pepsi Amp $1.49;New Price;Item;;;;;1,49;Price;0;0,8958;27.01.2018;14.04.2018;No;No;No;No;;;;;No
Item;25335;;Pepsi Amp $1.49;Pepsi Amp $1.49;;;;;49000018011;UPCA;Pepsi Energy 16oz;;;;;;;;;;;;;;;;
Item;25335;;Pepsi Amp $1.49;Pepsi Amp $1.49;;;;;49000000467;UPCA;Pepsi Energy Cherry 16oz;;;;;;;;;;;;;;;;
```

length : 767 lines : 5 Ln : 1 Col : 249 Sel : 0 | 0 Windows (CR LF) UTF-8-BOM IN

The file must have the following structure. Non-mandatory fields can be omitted.

Field Name	Mandatory (Yes/No)	Description
Record Type	Yes	Type of record in the current row. Possible values: - Promotion – if the row contains promotion settings - Item – if the row contains a link to an item included in the promotion or custom group - Promo Group – if the row contains a link to a promo group linked with the promotion - Custom Group – if the row contains a custom group for the promotion of the Price Each Mix type - Department – if the row contains a link to the department included in the promo The default value (if the field is left blank) is Promotion.
Promotion ID#	Yes	Unique promotion ID.
CRIND	No	Promotions index sent to the cash register.

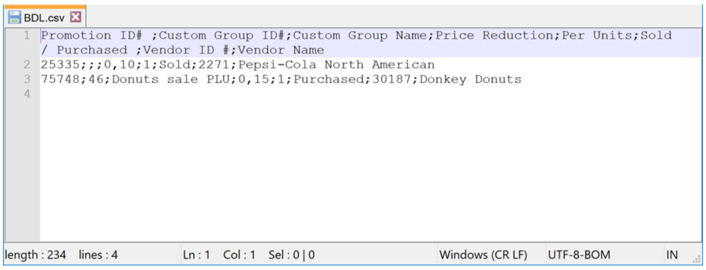
Field Name	Mandatory (Yes/No)	Description
		This parameter is currently not supported by the cash registers.
Promotion Description	Yes	Promotion name as it appears in C-Store Office.
Promotions CR Description	Yes	Promotion name as it appear s at the cash register.
Source	No	Any custom text showing where data came from, can be left blank.
Promotion Type	Yes	Promotion type. Possible values: - Price reduction - New price - Price modifier - Mix & match - Price each mix - Link saver - Coupon - Combo
Inclusion type	Mandatory if **Record Type** = Promotion	Type of inclusion. Possible values: - Item - Promo Group - Department
Custom Group ID#	Mandatory if **Record Type** = Custom Group **Promotion type** = Price Each Mix	Custom group ID, for groups of Price Each Mix promotions.
Custom Group Name	Mandatory if **Custom Group ID#** is not empty	Custom group name for Price Each Mix promotions.
SKU/Group ID#	Required if **Record Type** = Item **Record Type** = Promo Group **Record Type** = Department	SKU of the item of the promo group/department ID.

Field Name	Mandatory (Yes/No)	Description
SKU Type	Mandatory if **SKU/Group ID#** is not empty	Type of the value passed in **SKU/Group ID#**. Possible values: - UPCA - UPCE - GTIN - EAN8 - EAN13 - ID ID is passed when sending the department/promo group ID. The default value is UPCA (if left blank).
Item/Promo Group Description	No	Option field for customer convenience, contains the name of the item/promo group/department passed.
Discount Amount	Yes	New price or price change amount or percent.
Discount Type	Yes	Discount type. Possible values: - Price - Amount - Percent
QTY Threshold	No	Quantity of items that must be sold to apply the promotion price.
Unit cost	No	Promotion unit cost.
Date From	Yes	Start date of the promotion. The date format is YYYY-mm-dd.
Date To	No	End date of the promotion. The date format is YYYY-mm-dd.
Refund Allowed	No	Flag for the cash register indicating that refunds are allowed for the promotion. Possible values: - 1 - Yes - 0 - No
Accept Food Stamps	No	Flag indicating that food stamps are allowed for the promotion. Possible values: - 1 - Yes - 0 - No
Include Parents	No	Flag that allows to apply the promotion to parent items.
Enable Loyalty	No	Flag indicating that the loyalty program is enabled for this promotion. Possible values: - 1 - Yes - 0 - No
Earn Points	No	Flag indicating that loyalty points are earned for this promotion. Poss-

Field Name	Mandatory (Yes/No)	Description
		ible values: - 1 - Yes - 0 - No
Earn Points Mode	No	Flag indicating how loyalty points are earned. Possible values: - $ - Promo
Earn Points Rate	No	How many loyalty points are earned.
Use Points	No	Flag indicating that loyalty points can be spent to pay for this promotion. Possible values: - 1 - Yes - 0 - No
Use Points Rate	No	Rate in $ for one loyalty point.
Loyalty Only	No	Flag indicating that the promotion is valid for loyalty customers only. Possible values: - 1 - Yes - 0 - No

BDL File Structure

The BDL file describes buydowns linked to promotions, providing information about vendors, custom groups and items.



```
BDL.csv
1 Promotion ID# ;Custom Group ID#;Custom Group Name;Price Reduction;Per Units;Sold / Purchased ;Vendor ID #;Vendor Name
2 25335;;;0,10;1;Sold;2271;Pepsi-Cola North American
3 75748;46;Donuts sale PLU;0,15;1;Purchased;30187;Donkey Donuts
4
length : 234   lines : 4   Ln : 1   Col : 1   Sel : 0 | 0   Windows (CR LF)   UTF-8-BOM   IN
```

The file must have the following structure. Non-mandatory fields can be omitted.

Field Name	Mandatory (Yes/No)	Description
Promotion ID#	Yes	Promotion ID that belongs to this reimbursment record.
Custom Group ID#	Mandatory for Price	Price Each Mix promotion custom group ID that belongs to this reimbursment record.

Field Name	Mandatory (Yes/No)	Description
	Each Mix groups buy-downs	
Custom Group Name	No	Optional custom group name for customer convenience.
Price Reduction	Yes	Reimbursment amount in $.
Per Units	Yes	Units quantity for reimbursement.
Sold / Purchased	Yes	Reimbursement by sales or purchases mode. Possible values: - Sold - Purchased
Vendor ID #	No	ID of the vendor that reimburses the promotion.
Vendor name	No	Name of the vendor that reimburses the promotion.

ITL File Structure

The ITL file describes items linked to promotions, providing detailed items data. For more details about the file structure, see Preparing a File for Data Import.

Items(Items)_04-04-2019_16_04_37.csv

```
"SKU","SKU Type","Upca","Upce","PLU","Ean8","Ean13","Source","Linkable","Description","CR Description","Size","Measure Type","Length","Width","Height","Retail","Recommended Retail","Min Recommended Retail","Max Recommended Retail","Vendor ID","Vendor","Units in Case","VIN","Cost","Negotiated Cost","Negotiated Cost Apply From Date","Negotiated Cost Apply To Date","CRV Item","Child in parent","Parent SKU","Child SKU","Category ID","Category","Department ID","Department","Manufacturer ID","Manufacturer","Trusted_index","Popularity_index","Min Stock","Price Group","Promo Group","Inactive On Account","Inactive On Station","Is Not For Sale","Lottery State ID","Lottery State","Wash Expiry In Days","Car Wash Controller Code","Wash Type","Wash Package Code","Tax default from Department","Tax 1","Tax 2","Tax 3","Tax 4","Product Code default from Department","Product Code","Errors"
"02838423","1","028200003843","00283842","0","","","Account: Greyhound","0","MARLBORO GOLD PK BOX FSC","MARLBORO GOL","PK","piece","0","0","0","","","","","","","","","","","0000-00-00","0000-00-00","","","","","1","Cigarettess","201","CIGARETTES PREM","159","Philip Morris USA/Tobacco Products","8","8","","Camel Packs_Test","Marlboro Mainline","0","","0","0","","0","0","0","0","0","0","0","0","0","0","",
"02657512","1","026100005752","00265751","0","","","Account: Greyhound","0","NEWPORT BOX FSC","NEWPORT BOX","PK","piece","0","0","0","0.00","0.00","0.00","0.00","","","","","","","0000-00-00","0000-00-00","","","","","1","Cigarettess","201","CIGARETTES PREM","146","Lorillard Tobacco Company","8","4","","","","0","1","0","0","","0","0","0","0","0","0","0","0","0","0","",
"02657318","1","026100005738","00265731","0","","","Account: Greyhound","0","NEWPORT BOX 100 FSC","NEWPORT BOX","PK","piece","0","0","0","0.00","0.00","0.00","0.00","","","","","","","0000-00-00","0000-00-00","","","","","1","Cigarettess","201","CIGARETTES PREM","146","Lorillard Tobacco Company","8","4","","","","0","1","0","0","","0","0","0","0","0","0","0","0","0","0","",
"01213104","1","012000001314","00121310","0","","","Account: Greyhound","0","MT DEW 20OZ","MT DEW 20OZ","20 OZ","weight","0","0","0","","","","","","","","","","","0000-00-00","0000-00-00","","","","","12","Soft Drinks 111","9","Soda","37","Pepsi-Cola North America Inc.","8","4","","Pepsi  & Mt Dew20oz $1.99","MtDew Family 20oz","0","","0","0","","0","0","0","0","0","0","0","0","0","0","",
```

DPL File Structure

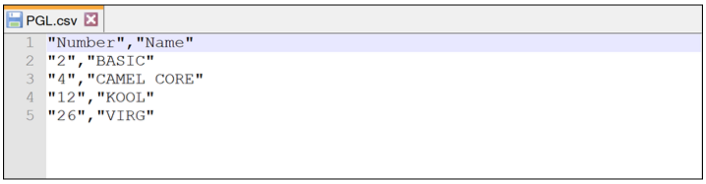
The DPL file describes departments linked to promotions. For more details about the file structure, see Working with Price Book Departments.

Departments.csv

```
"Number","Name","Source","Description","Min Price","Max Price","Default Price","Matched Category ID","Matched Category","Department Type ID","Department Type","Income ID","Income","Tax1","Tax2","Tax3","Tax4","Min Age","Food Stamp Allowed","Neg","Blue Laws","Blue Laws2","IMoA","Default Sales Qty","Product Code","Check H.ID","Ma Category"
"1","Tobacco","Account: Greyhound","Tobacco2","0.34","75.00","0.00","2","Tobacco","0","Store","0","","N","N","N","N","18","N","N","N","N","N","1","","1",""
"2","Juices","Account: Greyhound","Juices","0.01","20.00","0.00","6","Juices","0","Store","0","","N","N","N","N","17","Y","N","N","N","N","1","","1",""
"3","Candy","Account: Greyhound","Candy","0.01","20.00","0.00","23","Candy","0","Store","0","","N","N","N","N","0","Y","N","N","N","N","1","","0",""
```

PGL File Structure

The PGL file describes promo groups linked to promotions.



PGL.csv

```
"Number","Name"
"2","BASIC"
"4","CAMEL CORE"
"12","KOOL"
"26","VIRG"
```

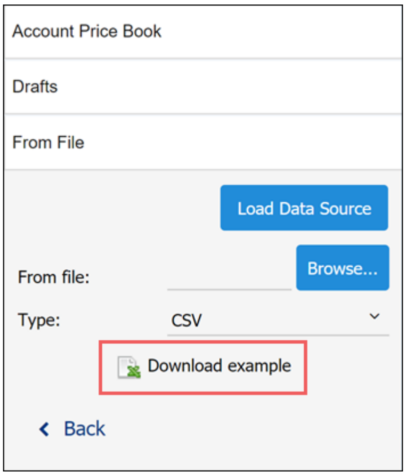
The file must have the following structure. Non-mandatory fields can be omitted.

Field Name	Mandatory (Yes/No)	Description
Number	Yes	Unique group ID.
Name	No	Group name.

File Template

To construct a file for import, you can use a template provided by Petrosoft. To get the template and prepare the file, follow the steps:

1. In the Import Tool, on the **Data Sources** panel, select **From file**.
2. Click the **Download example** link.



3. The downloaded file is provided in the XLSX format:
   - On the **Fields Description** tab, get information about every entry that must be filled in the file.
   - On the **DatasourceTemplate** tab, fill data for the objects that you want to import.
4. Once the file is ready, switch to the **DatasourceTemplate** tab and save the file in the CSV or XLSX format.
   Result: You can use the saved file for import.

Working with Price Book Item Tags

With the Import Tool, you can perform the following operations with the item tags:

- Import item tags to a location from the following data sources:
  - Account Price Book
  - Drafts
  - File (for more details, see Preparing a File for Data Import)
- (Optional) Monitor and adjust the taxonomy settings of the imported items within item tags, if any.
- Manage the item tags
- Prepare file with item tags for importing

Importing Item Tags to Station (Location)

To import the item tags to a station (location), follow the steps:

1. Go to **Operational Menu** > **Price Book** and then click **Item Tags**.
2. Go to **DRAFTS** and create a new draft. For details, see Working with Drafts List.
3. Import item tags to the draft from any of the available data sources:

   > For more information on importing data to the draft, see Importing Data to Draft.

   - **Account Price Book**
   - **Drafts**
   - **From File**

   > For more information on working with the data sources, see Importing Data from Different Sources.

4. Copy the draft's data to any of the current account's locations. For details, see Exporting Draft Data.
5. Make sure the item tags are copied successfully.
   Go to CSO main menu and then click **Price Book** > **Item Tags**.

Monitoring and Adjusting Items Taxonomy when Importing Item Tags

If the importing item tags contain items, you can monitor and adjust the following items taxonomy settings during the item tags import:

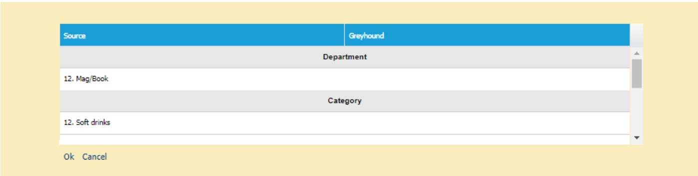
- Categories
- Departments

Items taxonomy settings can be monitored and adjusted during the item tags import, in case the following conditions are met:

- The item tag has just been added to the draft.
- The item tag contains items with undefined category or/and department.
- The **Import Items List** check box is selected in the draft table for the imported tag.

Monitoring Items Taxonomy Settings when Importing Item Tags

You can monitor the items taxonomy settings in the mapping table, which appears above the item tags draft, when you are saving item tags from the draft to one or several locations under the above conditions.



Adjusting Items Taxonomy Settings when Importing Item Tags

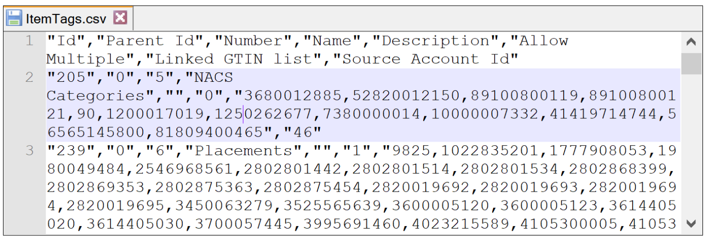
For each element in the **Source** column, select the corresponding element in the account column from the list of available elements.

Managing Item Tags

You can manage the item tags in the draft and then save this draft to any location on the current account. For more information on how to update the item tags in the draft, see Editing Draft Manually.

Preparing a File for Data Import

You can use CSV or XLSX files to import data about item tags and work with them in the Import Tool. In the file, you must provide data for all item tags whose data you want to import. Each line in the file contains data for a separate item tag. Each entry in the line corresponds to a specific item tag field, and each comma indicates where one entry ends and another entry begins.



Use the Item Tags file to import information about tags to the system. If you need to establish links between items and item tags, you can use the Taxonomy Assignment template. For details, see Item Taxonomy Assignment.

The file that you use for import of item tags data must have the following structure. Non-mandatory fields can be omitted.

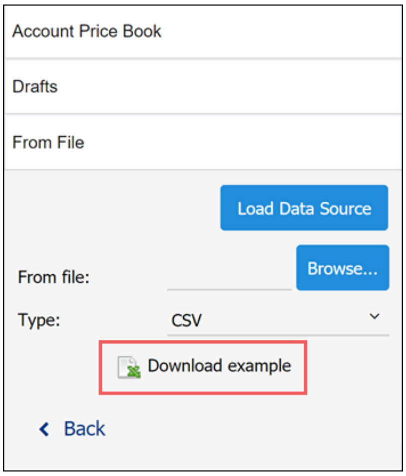
Field Name	Mandatory (Yes/No)	Description
Id	Yes	Unique tag ID.
Parent Id	Yes/No	Unique parent tag ID if it exists. Mandatory for child tags. If the **Parent Id** value is not provided, the tag will be recognized as a root tag.
Number	Yes	Customer tag number.
Name	Yes	Tag name.
Description	No	Tag description.
Allow Multiple	No	Flag that allows a user to apply multiple tags from one parent. Possible values: - 0: No - 1: Yes
Source Account Id	No	Reserved field, must be left empty.

Data for parent tags referenced in the file (by corresponding IDs) must also be provided in the same file, even if such tags already exist in the destination account. Otherwise, all tags that refer to a certain parent tag without a record for the parent tag will be recognized as root tags.

Downloading File Template

To construct a file for import, you can use a template provided by Petrosoft. To get the template and prepare the file, follow the steps:

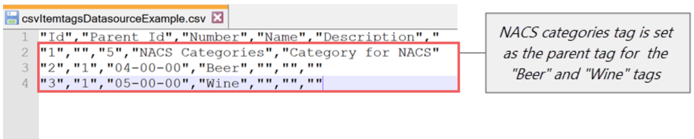
1. In the Import Tool, on the **Data Sources** panel, select **From file**.
2. Click the **Download example** link.



3. The downloaded file is provided in the XLSX format:
   - On the **Fields Description** tab, get information about every entry that must be filled in the file.
   - On the **csvItemtagsDatasourceTemplate** tab, fill data for the item tags that you want to import.
4. Once the file is ready, switch to the **csvItemtagsDatasourceTemplate** tab and save the file in the CSV or XLSX format.
   Result: You can use the saved file for import.

Importing Item Tags Parent-Child Relations

If you need to import tags with parent-child relations, use the **Parent Id** column. See the example below.



Working with Vendors

You can perform the following operations with the vendors:

- Importing vendors to a station (location) from the following sources:
  - Account Price Book
  - Location

> ⓘ Together with vendors, you can import all their items.

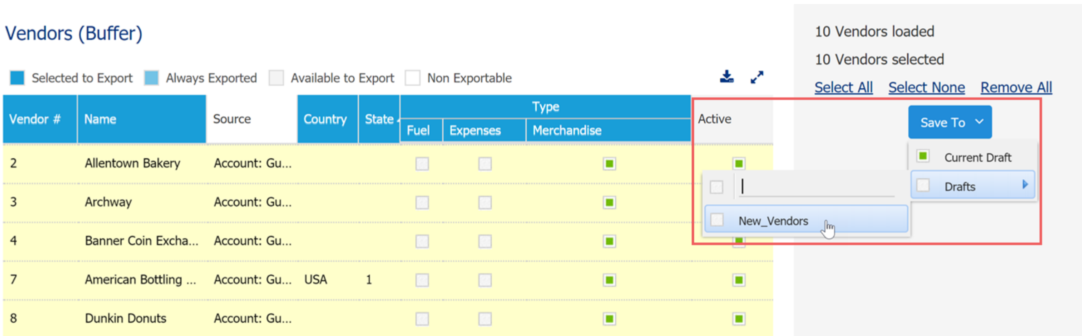
  - Drafts
  - File (for more details, see Preparing a File for Data Import)

- (Optional) Monitoring and adjusting the taxonomy settings of the imported items within vendors, if any.
- Managing the account's vendors.

Importing Vendors to Station (Location)

To import vendors to a station (location), follow the steps:

1. Import vendors from a source to the draft. Do the following:
   a. Go to **Operational Menu** > **Price Book** and then click **Vendors**.
   b. Go to **DRAFTS** and create a new draft or select one from the list of existing drafts. For details, see Working with Drafts List.
   c. Go to **Data Sources Panel** and then click the **Add More** button.
   d. Expand any source section.
   e. Select all criteria for uploading vendors. For details, see Importing Data from Different Sources.
   f. At the top of the section, click the **Load Data Source** button.
   g. Wait until all vendors are uploaded to the **Vendors (Buffer)** table.
   h. Select the vendors you want to import. To select all vendors, click **Select All**.
   i. Save selected vendors from buffer to your draft. For details, see Saving Data from Buffer to Draft.



2. Copy vendors from the saved draft to one or several locations. For details, see Exporting Draft Data.
3. Make sure the vendors are copied successfully. Go to **Home Page** > **Vendors** > **Vendors List**.

Monitoring and Adjusting Items Taxonomy when Importing Vendors

If the importing vendors contain items, you can monitor and adjust the following items taxonomy settings during the vendors import:

- Categories
- Departments

Items taxonomy settings can be monitored and adjusted during the vendors import, in case the following conditions are met:

- The vendor has just been added to the draft.
- The vendor contains items with undefined category or/and department.
- The **Import vendor items** option was selected when importing vendors to the draft.
  For details, see Importing Data from Account Price Book or Importing Data from Location > **In case the vendors are imported** step.

Monitoring Items Taxonomy Settings when Importing Vendors

You can monitor the items taxonomy settings in the mapping table, which appears above the vendors draft, when you are saving vendors from the draft to one or several locations under the above conditions.

Adjusting Items Taxonomy Settings when Importing Vendors

For each element in the **Source** column, select the corresponding element in the account column from the list of available elements.

Managing Account Vendors

You can manage the account vendors in the draft table. For more information on how to manage vendors in the draft, see Editing Draft Manually.

To apply the changes made with vendors to the whole account, save this draft to any location on this account.

In case you need to update only some attributes, before exporting vendors, make sure the columns of the draft's table with these attributes only are selected. For details, see Editing Draft Manually > **Adding or Removing Columns for Exporting**.

Preparing a File for Data Import

You can use CSV or XLSX files to import data about vendors and work with them in the Import Tool. In the file, you must provide data for all vendors whose data you want to import. Each line in the file contains data for a separate vendors. Each entry in the line corresponds to a specific vendor field, and each comma indicates where one entry ends and another entry begins.

vendors.csv

```
"Vendor ID","Name","Abbreviation","Country ID","State
ID","Country","State","City","Address","ZIP","Phone","Fax","Email"
,"Fuel","Expenses","Merchandise","Lottery"
"19","Little
Debbie","","0","0","","","","","","","","","0","0","1","0"
"31","R.J.Reynolds","REY","1","1","United
States","1","","","0","0","0","","0","0","1","0"
"33","Radio Chak","","1","32","United
States","32","","","0","0","0","","0","0","1","0"
```

The file that you use for import of vendors data must have the following structure. Non-mandatory fields can be omitted.

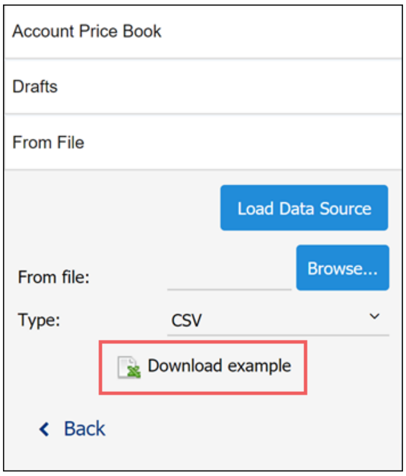
Field Name	Mandatory (Yes/No)	Description
Vendor ID	Yes	Vendor ID in C-Store Office.
Name	Yes	Vendor name.
Tax ID	No	Vendor tax ID.
Abbreviation	No	Abbreviation for the vendor name.
Country ID	No	Vendor residence country ID in C-Store Office.
State ID	No	Vendor residence state ID in C-Store Office.
Country	No	Vendor residence country name.
State	No	Vendor residence state name.
City	No	Vendor residence city.
Address	No	Vendor residence address.
ZIP	No	Vendor ZIP.
Phone	No	Vendor phone.
Fax	No	Vendor's Fax
Email	No	Vendor email.
Contact person	No	Vendor main contact person.
Merchandise	No	Determines if operations of the Merchandise type are available for the vendor. Possible values: - 1 - Yes (default) - 0 - No
Fuel	No	Determines if operations of the Fuel type are available for the vendor. Possible values: - 1 - Yes - 0 - No (default)
Expenses	No	Determines if operations of the Expenses type are available for the vendor. Possible values: - 1 - Yes - 0 - No (default)
GL#	No	General ledger account No.

Field Name	Mandatory (Yes/No)	Description
Use Fintech	No	Determines if the fintech method of payment can be applied for the vendor. Possible values: - 1 - Yes - 0 - No
Use negotiated cost	No	Negotiated cost regarding the items will be used as a default one when creating purchase documents in C-Store Office. Possible values: - 1 - Yes - 0 - No (default)
Pref. MOP	No	Preferred method of payment. Possible values: - CASH - CHECK - CREDIT
Active	No	Is the vendor active. Possible values: - 1 - Yes (default) - 0 - No
Items QTY	No	Items quantity.

File Template

To construct a file for import, you can use a template provided by Petrosoft. To get the template and prepare the file, follow the steps:

1. In the Import Tool, on the **Data Sources** panel, select **From file**.
2. Click the **Download example** link.



3. The downloaded file is provided in the XLSX format:

- On the **Fields Description** tab, get information about every entry that must be filled in the file.
- On the **csvVendorsDatasourceTemplate** tab, fill data for the vendors that you want to import.

4. Once the file is ready, switch to the **csvVendorsDatasourceTemplate** tab and save the file in the CSV or XLSX format.
   Result: You can use the saved file for import.

Working with Lottery Games

With the Import Tool, you can import lottery games data, adjust and manage it just like regular Price Book items data. For lottery games items, import from the following data sources is supported:

- Account Price Book
- Location Price Book
- File (for more details, see Preparing a File for Data Import)
- Draft

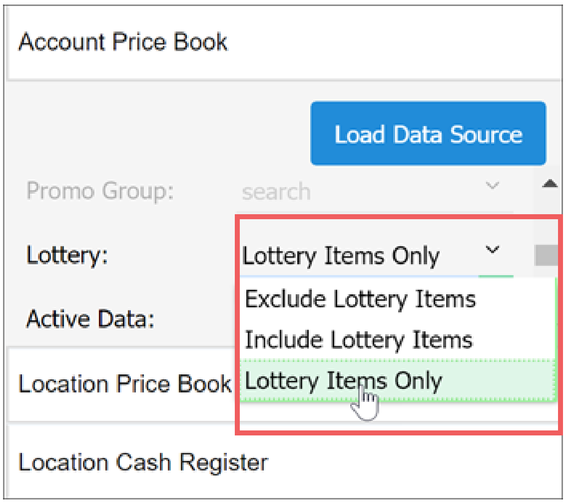
Importing Lottery Games Data

Lottery games data is imported using the **Items** section in the Import Tool. In general, the workflow for lottery games data import is the same as for regular Price Book items. You can perform similar activities with the lottery games data, including copying data between accounts, importing data to a station (location) from supported sources, exporting data to a file and so on. For more details, see Working with Price Book Items.

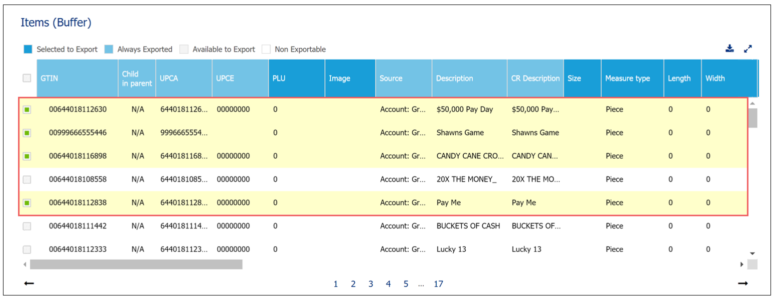
To import lottery games data, follow the steps:

1. Import lottery games data from a source to the draft. Do the following:
   a. Go to **Operational Menu** > **Price Book** and then click **Items**.
   b. Go to **Drafts** and create a new draft.
   c. Go to **Data Sources** panel and then click the **Add More** button.
   d. Expand the section of a supported source from which you want to import data.
   e. In the **Lottery** list, select the necessary option for data import:

      - **Exclude Lottery Items**: select this option to import only the Price Book items data.
      - **Include Lottery Items**: select this option to import the lottery games data together with the Price Book items data.
      - **Lottery Items Only**: select this option to import only the lottery games data.



f. Select the criteria for uploading items.
g. Click the **Load Data Source** button.
h. Wait until all items are uploaded to the **Items (Buffer)** table.
i. Select the items that you want to import:
   - To select all items, click **Select All**.
   - To deselect all items, click **Select None**



j. Save the selected items from the buffer to your draft. For details, see Saving Data from Buffer to Draft.

2. Copy the items from the saved draft to one or several locations. For details, see Exporting Draft Data to Location.
3. Make sure the items are copied successfully. To do this, go to **Home Page** > **Items Updates** and then open the **Updates Manager** for your station (location) you've just imported items in.

Preparing a File for Data Import

You can use CSV or XLSX files to import data about lottery games and work with them in the Import Tool. In the file, you must provide data for all lottery games items whose data you want to import. Each line in the file contains data for a separate lottery game item. Each entry in the line corresponds to a specific item field, and each comma indicates where one entry ends and another entry begins.

The file that you use for import of lottery games data must have the following structure. Non-mandatory fields can be omitted.

Field Name	Mandatory (Yes/No)	Description
SKU	Yes	Item code in one of supported formats: - PLU - UPCA - UPCE - EAN8 - EAN13 - GTIN
SKU Type	Yes	SKU code type for the SKU code in the previous field. Possible values: - 0: UPCA - 1: UPCE - 2: EAN8 - 3: EAN13 - 4: PLU - 5: GTIN
Description	Yes	Item name as it appears in the C-Store Office Price Book.
CR Description	Yes	Item name as it appears at the cash register and in customer receipts. Must be no longer than 20 symbols. Longer values will be cropped.
Size	No	Item size and units of measurements, for example: 20 oz.
Measure Type	No	Type of measurement units. Provided for QwickServe. Possible values: - Piece - Weight - Volume
Length	No	Length of the item pack.
Width	No	Width of the item pack.
Height	No	Height of the item pack.
Retail	No	Retail price for the item.
Recommended Retail	No	Recommended retail price for the item.
Min Recom-mended Retail	No	Minimum recommended retail price for the item.
Max Recom-mended Retail	No	Maximum recommended retail price for the item.

Field Name	Mandatory (Yes/No)	Description
Vendor ID	No	Vendor identifier in C-Store Office.
Vendor	No	Vendor name for the specified Vendor ID.
Units in Case	No	How many item units are available in a case. Is used for invoices.
VIN	No	Item code assigned by the vendor.
Cost	No	The last invoice cost.
Negotiated Cost	No	Standard item cost for Vendor ID, may be configured as postpone cost change if combined with the next two fields.
Apply Nego-tiated Cost from	No	Date when the postpone negotiated cost will be applied, for example, 2017-12-23. The date format is YYYY-mm-dd.
Apply Nego-tiated Cost to	No	Date when the negotiated cost will be removed. The date format is YYYY-mm-dd.
Category ID	Yes	Category ID in C-Store Office.
Category	No	Category name for the specified Category ID.
Department ID	Yes	Department ID in C-Store Office.
Department	No	Department name for the specified Department ID.
Price Group ID	No	Price Group ID in C-Store Office.
Price Group	No	Price Group name for the specified Price Group ID.
Promo Group ID	No	Promo Group number in C-Store Office.
Promo Group	No	Promo Group name for the specified Promo Group ID.
Manufacturer ID	No	Manufacturer ID in C-Store Office.
Manufacturer	No	Manufacturer name for the specified Manufacturer ID.
Is Recipe Item	No	Flag to mark the item as a QwickServe recipe item. Possible values: - 1: yes - 0: no
Is Ingredient Item	No	Flag to mark the item as a QwickServe ingredient. Possible values: - 1: yes - 0: no
Min Stock	No	Minimum quantity of items in stock.
Inactive on Account	No	Flag to mark the item as inactive at the account level. Possible values - 1: yes - 0: no
Inactive on Sta-tion	No	Flag to mark the item as inactive at the station (location) level. Poss-

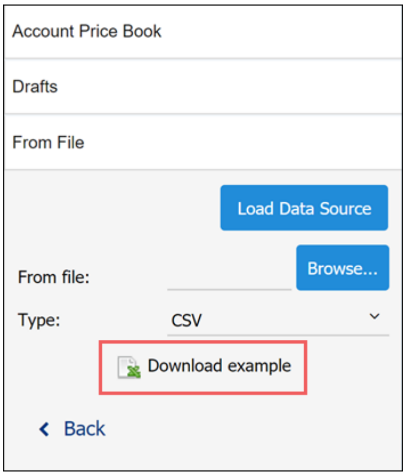
Field Name	Mandatory (Yes/No)	Description
		ible values - 1: yes - 0: no
Is Not For Sale	No	Flag to mark the item as not for sale. Possible values - 1: yes - 0: no
Lottery State ID	No	Lottery state: state code specified in C-Store Office.
Lottery State	No	Lottery state name for the specified Lottery State ID.
Wash Expiry In Days	No	Not applicable.
Car Wash Controller Code	No	Not applicable.
Wash Type	No	Not applicable.
Wash Package Code	No	Not applicable.
Tax Default from Department	No	Flag to indicate if taxes for the item should be taken from the department taxes for the station (location). Possible values: - 1: yes - 0: no The default value is 1. The field value should not be set to 1 if at least one of the following four fields (Tax 1-Tax 4) has the 1 value.
Tax 1	No	Flag to indicate if tax 1 is applied for the item. Possible values: - 1: yes - 0: no The default value is 0.
Tax 2	No	Flag to indicate if tax 2 is applied for the item. Possible values: - 1: yes - 0: no The default value is 0.
Tax 3	No	Flag to indicate if tax 3 is applied for the item. Possible values: - 1: yes - 0: no The default value is 0.
Tax 4	No	Flag to indicate if tax 4 is applied for the item. Possible values: - 1: yes

Field Name	Mandatory (Yes/No)	Description
		- 0: no The default value is 0.
Product Code default from Department	No	Flag to indicate if the product code for the item should be taken from the department's product code set for the station. Possible values: - 1:yes - 0: no The default value is. The field value should not be set to 1 if the **Product Code** field contains any value (not empty).
Product Code	No	Product code value.

File Template

To construct a file for import, you can use a template provided by Petrosoft. To get the template and prepare the file, follow the steps:

1. In the Import Tool, on the **Data Sources** panel, select **From file**.
2. Click the **Download example** link.



3. The downloaded file is provided in the XLSX format:
   - On the **Fields Description** tab, get information about every entry that must be filled in the file.
   - On the **csvItemsTemplate** tab, fill data the for lottery games items that you want to import.
4. Once the file is ready, switch to the **csvItemsTemplate** tab and save the file in the CSV or XLSX format.
   Result: You can use the saved file for import.

Importing Station Data

With the Import Tool, you can import and update the following station data on your current account:

- General station settings
- Station trading hours

General Station Settings

The Import Tool allows you to import and work with general settings of locations (stations) on your current account. The imported data include the station name and ID, address and phone number details, division and so on.

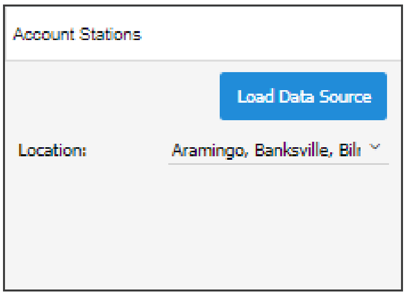
With the Import Tool, you can perform the following actions with the general station data:

- Update the general station data on your account.
- Import the general stations data to your account from the following data sources:
  - From a draft
  - From a file
- Manage the general station data.
- Prepare a file with the general stations data for importing.

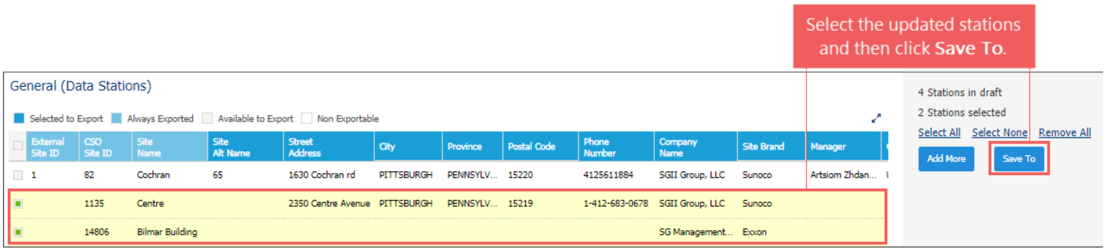
Updating General Station Data on Your Account

To update the general station data on your current account, follow the steps:

1. Go to **Operational Menu** > **Import Data Station** and then click **General**.
2. Go to **DRAFTS** and create a new draft. For details, see Working with Drafts List.
3. Go to **Data Sources Panel** and then do the following:
   a. Click the **Add More** button.
   b. Click **Account Stations**.
   c. In the **Location** list, select one or several locations, which data you want to update.
   d. Click **Load Data Source**.



4. Edit the stations data in the draft table. For details, see Editing Draft Manually.
5. Select the updated stations and then in the **Data Sources Panel**, click **Save To**.



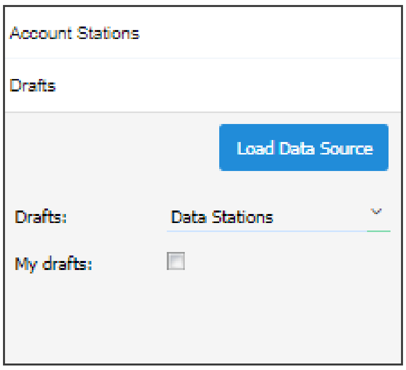
6. Make sure the general stations data are updated successfully on your account:
   a. Go to CSO **Settings** > **General** > **Locations**.
   b. In the **Locations** list, select the station you need to check and then click **Edit**.

Importing General Station Data to Your Account

You can import the general data for the stations on your account from the existing draft or from a file.

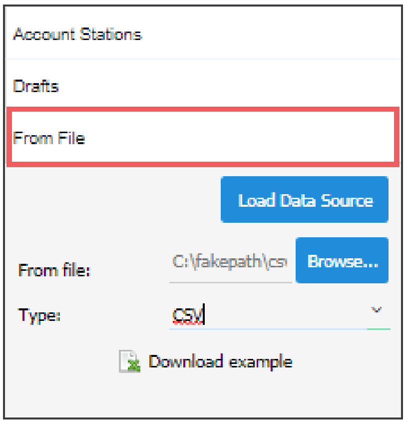
To import the general station data to your account from a draft or a file, follow the steps:

1. Go to **Operational Menu** > **Import Data Station** and then click **General**.
2. Go to **DRAFTS** and create a new draft. For details, see Working with Drafts List.
3. Go to **Data Sources Panel** and then click the **Add More** button.
4. Depending on which source you are going to use for importing stations data, expand one of the following sections:
   - **Drafts** - expand this section if you want to import stations data from the existing draft:
     - **Drafts** - select the draft saved and shared by another user.
     - **My drafts** - select this option to display your own saved drafts in the Drafts list.



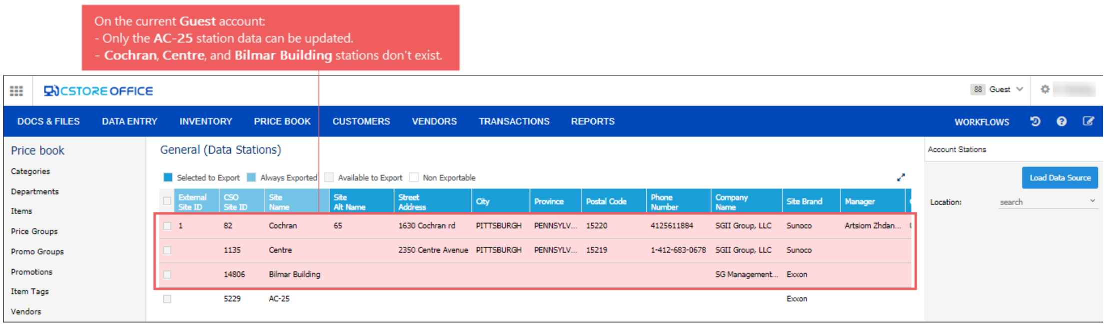
   - **From File** - expand this section if you want to import stations data from a file:
     a. Make sure the file you want to import data from has a correct data structure. To see the data structure example, click **Download Example**.
     b. Select the file by clicking **Browse**.

c. In the **Type** field, select the file type.

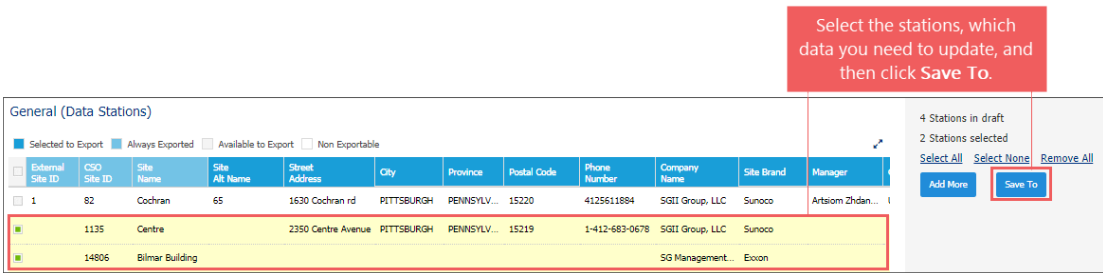


5. Click **Load Data Source**.

> You can import data only for the stations that already exist on your current account. Non-existing stations are highlighted in red in the draft.



6. In the draft, select the stations you need to import to your account and then in the **Data Sources Panel**, click **Save To**.



7. Make sure the general stations data are updated successfully on your account:
   a. Go to CSO **Settings** > **General** > **Locations**.
   b. In the **Locations** list, select the station you need to check and then click **Edit**.

Managing General Stations Data

You can manage the general station data in the draft and then save this draft to your account.

For more information on how to update the general station data in the draft, see Editing Draft Manually.

Preparing File with General Stations Data for Importing

To import the stations data from a file, fill in this file with the stations data based on the template below.

> You can import the data only for the stations already existing on your current account.

The file used for importing the general stations data has the following data structure:

csvStationsGeneralDatasourceExample.csv

```
External site ID,CSO Site ID,Site Name,Site Alt
Name,Country,Address,Street,District/Submunicipality,Subdistrict/Barangay,
City,State/Province & Territory,Division/Administrative Area,Postal/ZIP
Code,Phone Number,Fax Number,Company Name,Site
Brand,Manager,Latitude,Longitude,Division,Type 1,Type 2
```

- **External Site ID**
- **CSO Site ID**
- **Site Name**
- **Site Alt Name**
- **Street**
- **Address**
- **City**
- **State/Province & Territory**
- **Postal/ZIP Code**
- **Phone Number**
- **Fax Number**
- **Company Number**
- **Company Name**
- **Site Brand**
- **Manager**
- **Country**
- **Latitude**
- **Longitude**
- **Division/Administrative area**
- **District/Submunicipality**

- **Subdistrict/Barangay**
- **Type 1** - this field is imported and displayed in the draft only if the field is available to a user logged in to C-Store Office by the user permissions.
- **Type 2** - this field is imported and displayed in the draft only if the field is available to a user logged in to C-Store Office by the user permissions.

Site Trading Hours

The Import Tool allows you to import and work with site trading hours of locations (stations) on your current account. The imported data include the site name and ID, information about work days and trading hours set for the station.

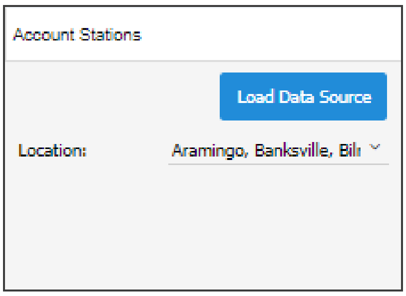
With the Import Tool, you can perform the following actions with the stations trading hours:

- Update the trading hours for the stations on your account.
- Import the trading hours for the stations on your account from the following data sources:
  - From a draft
  - From a files
- Manage the trading hours for the account's stations.
- Prepare file with the trading hours of the accounts' stations.

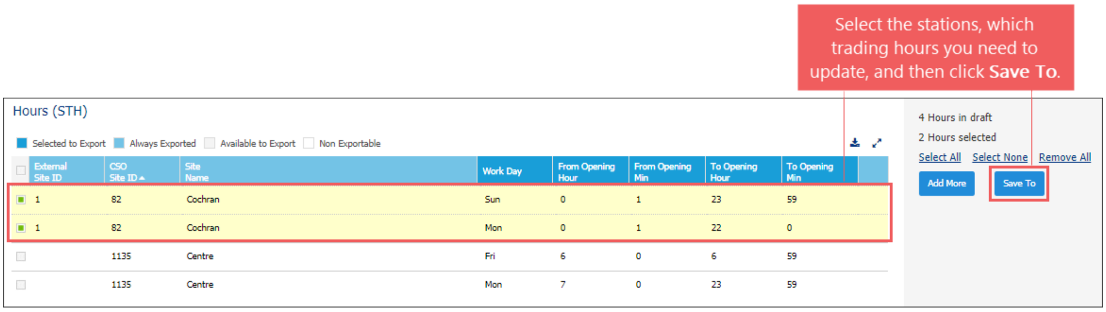
Updating Trading Hours for Account Stations

To update the trading hours for the stations on your current account, follow the steps:

1. Go to **Operational Menu** > **Import Data Station** and then click **Site Trading Hours**.
2. Go to **DRAFTS** and create a new draft. For details, see Working with Drafts List.
3. Go to **Data Sources Panel** and then do the following:
   a. Click the **Add More** button.
   b. Click **Account Stations**.
   c. In the **Location** list, select one or several locations, which data you want to update.
   d. Click **Load Data Source**.



4. Edit the trading hours for the stations you need in the draft table. For details, see Editing Draft Manually.
5. Select the updated stations and then in the **Data Sources Panel**, click **Save To**.



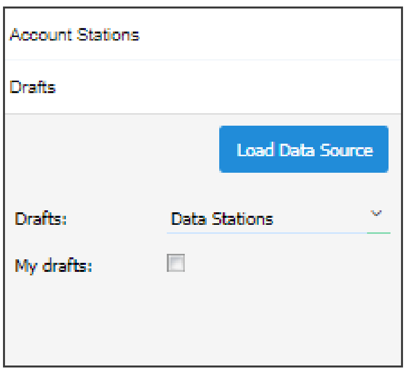
6. Make sure the trading hours for the stations on your account updated successfully on your account:
   a. Go to CSO **Settings** > **General** > **Locations**.
   b. In the **Locations** list, select the station you need to check and then click **Edit**.
   c. In the **General** stations settings, go to the **Working Hours** section.

Importing Trading Hours for Account Stations

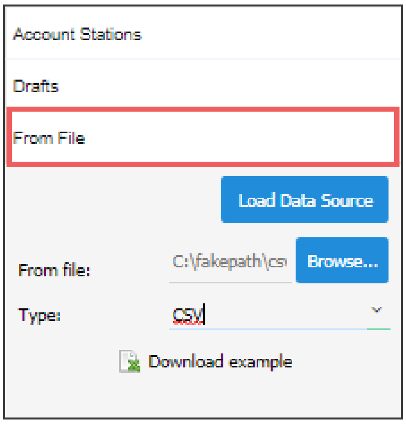
You can import the trading hours for the stations on your account from the existing draft or from a file.

To import the trading hours for the stations on your account from a draft or a file, follow the steps:

1. Go to **Operational Menu** > **Import Data Station** and then click **Site Trading Hours**.
2. Go to **DRAFTS** and create a new draft. For details, see Working with Drafts List.
3. Go to **Data Sources Panel** and then click the **Add More** button.
4. Depending on which source you are going to use for importing stations data, expand one of the following sections:
   - **Drafts** - expand this section if you want to import stations data from the existing draft:
     - **Drafts** - select the draft saved and shared by another user.
     - **My drafts** - select this option to display your own saved drafts in the Drafts list.

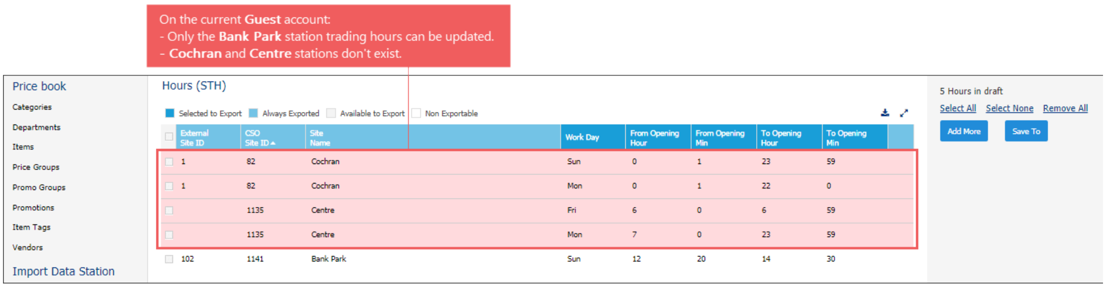


- **From File** - expand this section if you want to import stations data from a file:
  a. Make sure the file you want to import data from has a correct data structure. To see the data structure example, click **Download Example**.
  b. Select the file by clicking **Browse**.
  c. In the **Type** field, select the file type.

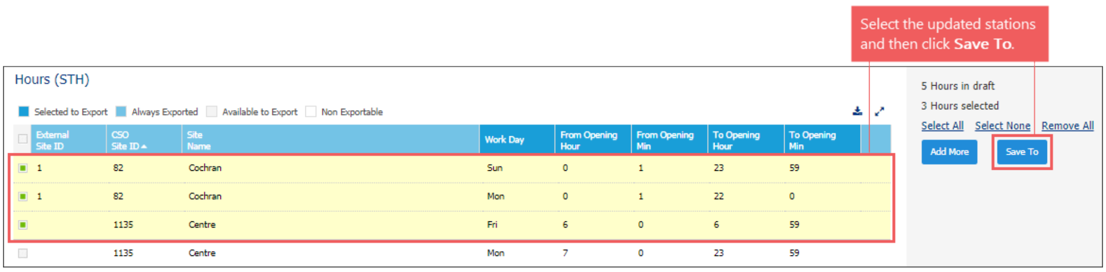


5. Click **Load Data Source**.

> You can import trading hours only for the stations that already exist on your current account. Non existing stations are highlighted in red in the draft.



6. In the draft, select the stations the trading hours of which you need to import to your account and then in the **Data Sources Panel**, click **Save To**.



7. Make sure the general stations data are updated successfully on your account:
   a. Go to CSO **Settings** > **General** > **Locations**.
   b. In the **Locations** list, select the station you need to check and then click **Edit**.

c. In the **General** stations settings, go to the **Working Hours** section.

Managing Trading Hours for Account Stations

You can manage the information about the trading hours for the stations on your account in the draft and then save this draft to your account.

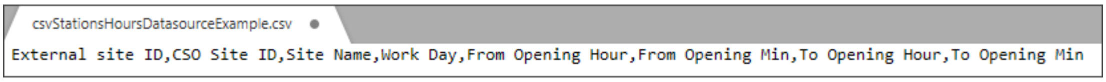
For more information on how to update the trading hours for your account stations in the draft, see Editing Draft Manually.

Preparing File with Stations Trading Hours for Importing

To import the stations trading hours from a file, fill in this file with the stations data based on the template below.

> You can import the data only for the stations already existing on your current account.

The file used for importing the stations trading hours has the following data structure:


csvStationsHoursDatasourceExample.csv

```
External site ID,CSO Site ID,Site Name,Work Day,From Opening Hour,From Opening Min,To Opening Hour,To Opening Min
```

- **External site ID**
- **CSO Site ID**
- **Site Name**
- **Work Day**
- **From Opening Hour**
- **From Opening Min**
- **To Opening Hour**
- **To Opening Min**

Import Price Book from Cash Register

By default, when a new location is created, its Price Book is empty. To streamline the process of Price Book population, you can import the Price Book data from the cash register set up at the location. Importing Price Book data saves a lot of time and effort as it allows importing a bunch of records in bulk and synchronizing data between the cash register and C-Store Office.

To import the Price Book data from the cash Register, use the **Import PB from CR** section of the Import Tool. You can import the following data:

- CR departments data
- Items data
- Promotions
- Fuel
- MOPs

After data import, you can additionally map newly imported items to categories in the C-Store Office Price Book. For more details, see Map Categories.

Import Departments from Cash Register

With the Import PB from the Cash Register module, you can pull departments data from the cash register and populate the Price Book with this data. The Import Tool imports such departments data as taxation information, department type, product code, age restriction and so on.

CR departments data can be imported in two ways:

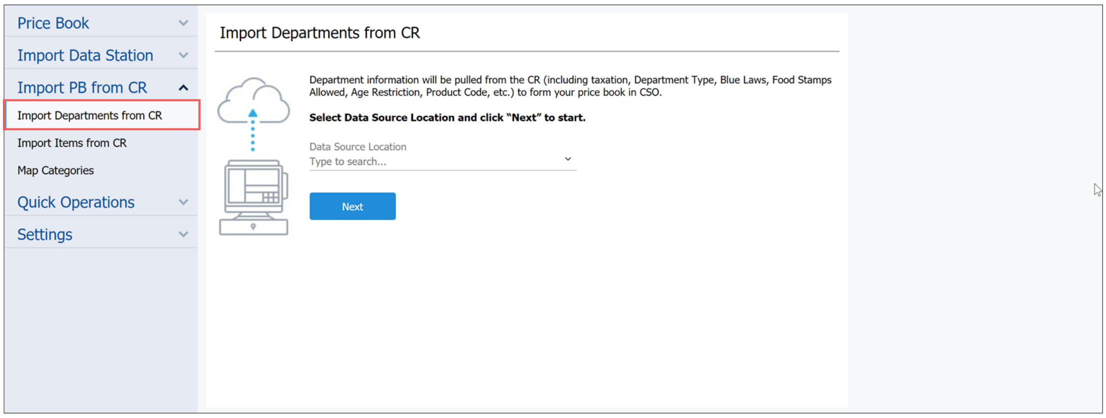
- Automatically: You can load departments data from the Price Book raw data located at the Cloud Storage.
- Manually: You can import departments data from a file in the XML format.

Importing CR Departments Data from CR

To import departments data from the cash register to the Price Book in C-Store Office:

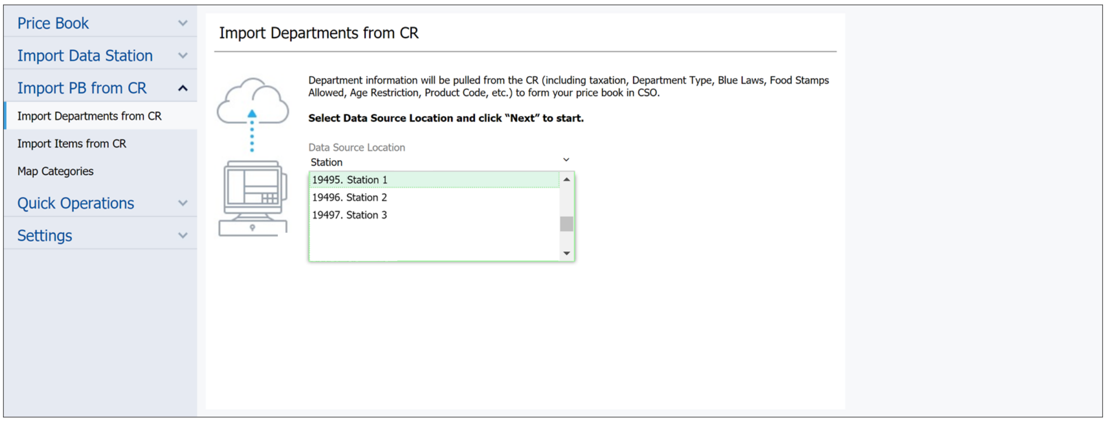
1. From the C-Store Office home page, go to **Price Book** > **Import Tool**.
2. In the **Import PB from CR** section, select **Import Departments from CR**.

   Result: The **Import Departments from CR** form opens.



3. From the **Data Source Location** list, select a location from which you want to import departments data.

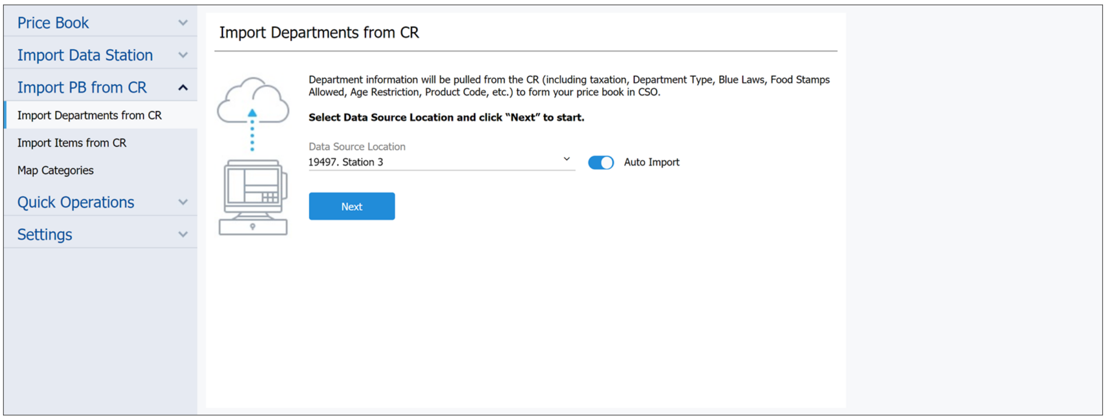
   To quickly find the necessary location, in the **Type to search** field, start typing the location name. The Import Tool will display all variants that match the name you enter.



4. If you want to import data automatically, leave the **Auto Import** toggle in the On position and click **Next**.

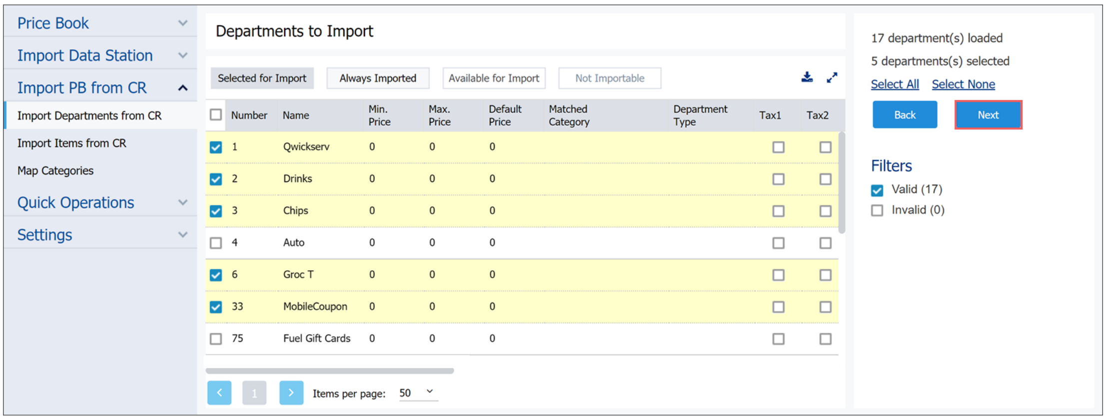
   To import departments data automatically, the raw Price Book data from the cash register must be stored at the Cloud Storage in the conexxus 3.5 format.

   If you want to import data from an XML file, set the **Auto Import** toggle to the Off position, then click **Browse** and select the file from which data must be imported.

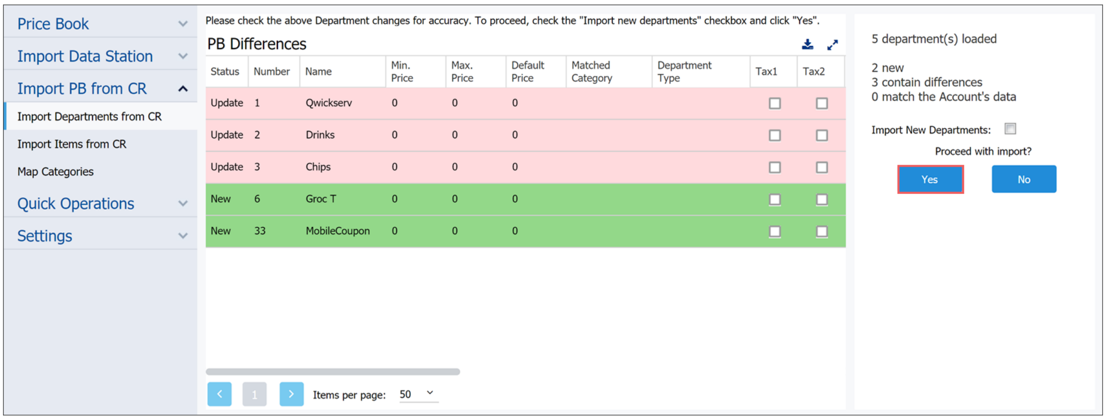


5. Click **Next**.
6. At the **Departments to Import** step, select the check boxes next to departments whose data you want to import.
7. Click **Next**.

> The Import Tool validates the imported data and filters departments as valid or invalid. For more details, see Validating Objects Data.



8. At the **PB Differences** step, review the differences between the Price Book departments in C-Store Office and at the cash register:
   - Departments that exist only in the Price Book at the cash register and must be copied to the Price Book in C-Store Office are marked green.
   - Departments that exist only in the Price Book in C-Store Office and must be updated with data from the Price Book at the cash register are marked red.
9. In the **Proceed with export** section, select the **Import New Departments** check box and click **Yes**.



Result: The Price Book departments from the cash register are imported to the Price Book in C-Store Office.

Mind the following:

- If you import new departments to the Price Book, the Import Tool imports all fields for such departments.
- If you import departments that already exist in the Price Book, the Import Tool does not update fields for such departments with new values (except empty fields of departments).

Import Items from Cash Register

With the Import PB from the Cash Register module, you can pull items data from the cash register and populate the Price Book with this data. The Import Tool imports such items data as UPC number, retail price, description, association with the CR department and so on.

Items data can be imported in two ways:

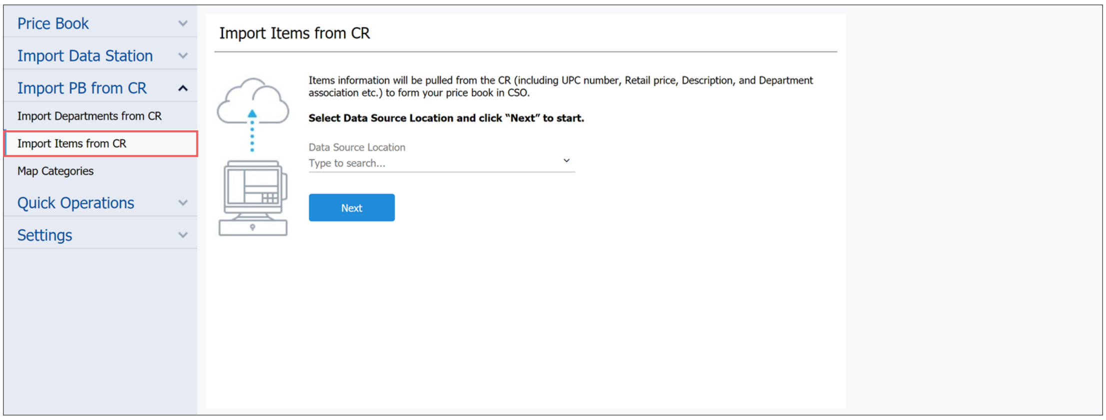
- Automatically: You can load items data from the Price Book raw data located at the Cloud Storage.
- Manually: You can import items data from a file in the XML format.

Importing Items Data from CR

To import items data from the cash register to the Price Book in C-Store Office:

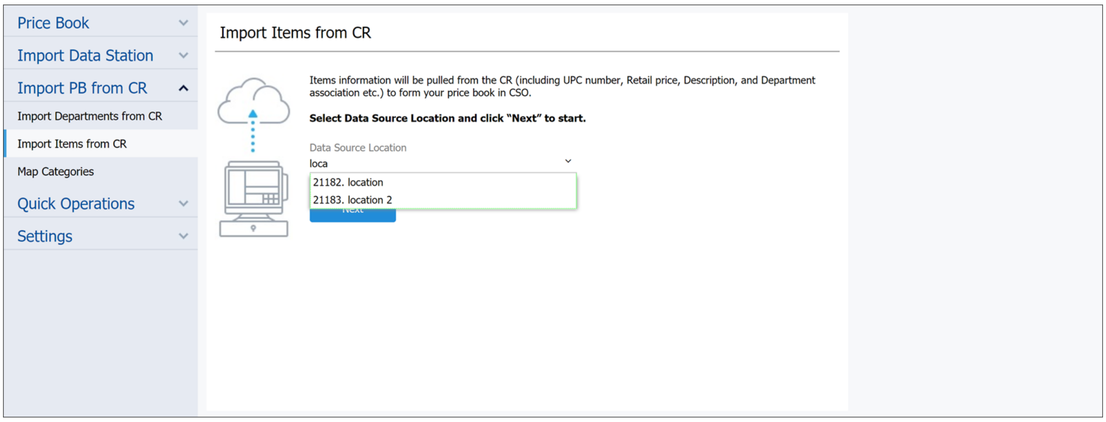
1. From the C-Store Office home page, go to **Price Book** > **Import Tool**.
2. In the **Import PB from CR** section, select **Import Items from CR**.

   Result: The **Import Items from CR** form opens.



3. From the **Data Source Location** list, select a location from which you want to import items data.

   To quickly find the necessary location, in the **Type to search** field, start typing the location name. The Import Tool will display all variants that match the name you enter.

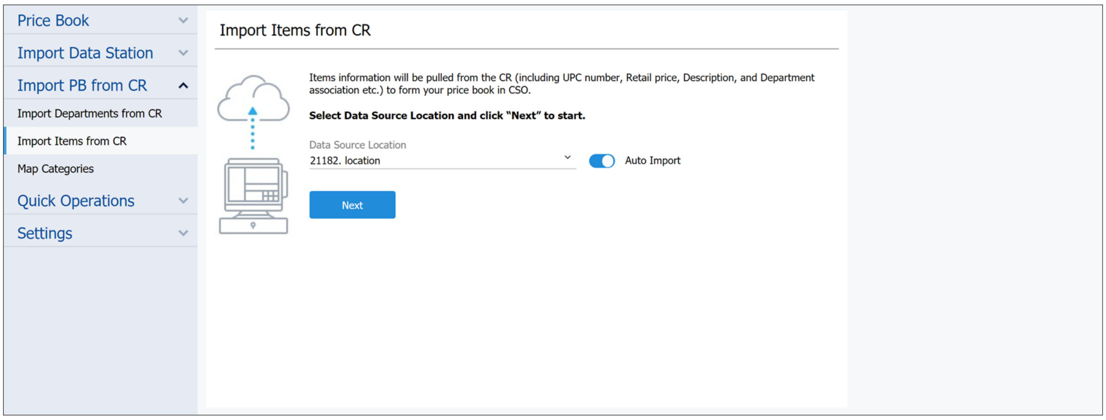


4. If you want to import data automatically, leave the **Auto Import** toggle in the On position and click **Next**.

   > To import items data automatically, the raw Price Book data from the cash register must be stored at the Cloud Storage in the conexxus 3.5 format.

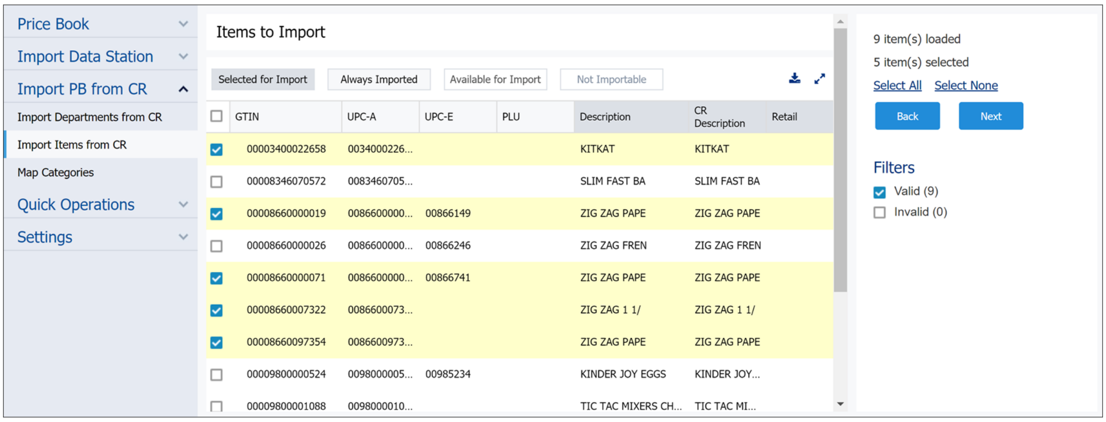
   If you want to import data from an XML file, set the **Auto Import** toggle to the Off position, click **Browse** and select the file from which data must be imported.

5. Click **Next**.



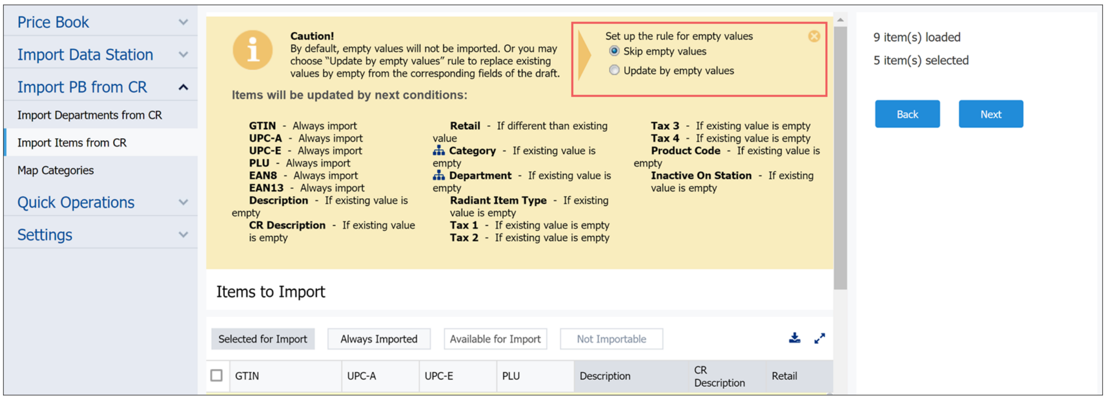
The Import Tool validates the imported data and filters items as valid or invalid. For more details, see Validating Objects Data.

6. At the **Items to Import** step, select check boxes next to items whose data you want to import.

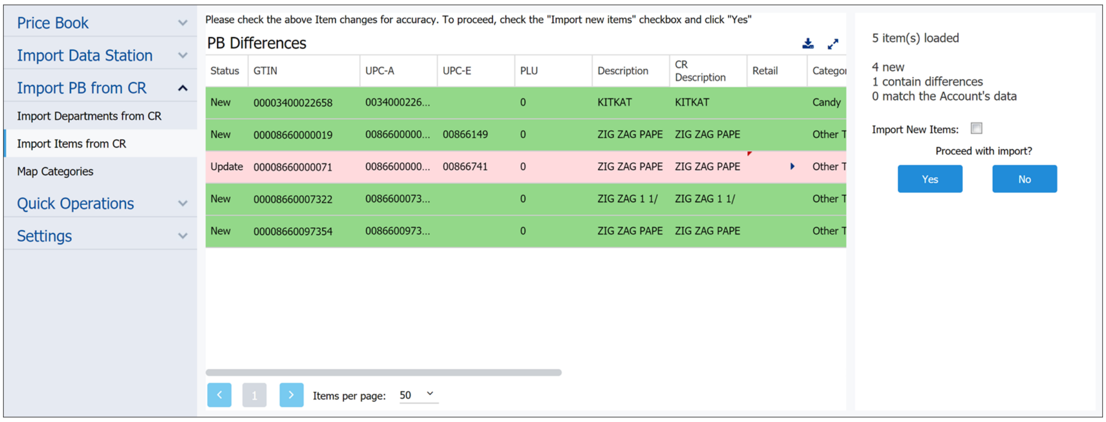


7. Click **Next**.
8. If the draft contains fields with empty values, you can specify how these values must be processed during export. At the top of the mapping results form, select the rule by which empty values must be exported:
   - **Skip empty values**: Select this option if you do not want to export empty values to the destination. This option is selected by default.
   - **Update by empty values**: Select this option if you want to replace existing values in the

destination with empty values exported from the source.



9. Click **Next**.
10. At the **PB Differences** step, review the differences between the Price Book items in C-Store Office and at the cash register:
    - Items that exist only in the Price Book at the cash register and must be copied to the Price Book in C-Store Office are marked green.
    - Items that exist only in the Price Book in C-Store Office and must be updated with data from the Price Book at the cash register are marked red.



11. In the **Proceed with export** section, click **Yes**.

    Result: The Price Book items from the cash register are imported to the Price Book in C-Store Office.

Mind the following:

- If you import new items to the Price Book, the imports all fields for such items.
- If you import items that already exist in the Price Book, the imports only values in the **Retail** field for such items.

If other users access the Cash Register Update Manager while the Price Book data is being synchronized, they will not be able to accept item changes until the synchronization process finishes.

Import Promotions from Cash Register

The **Import Promotions from CR** module of the Import Tool allows you to pull information about promotions available at the cash register and import it to C-Store Office. You can use this module to quickly synchronize the promotions data between cash registers and C-Store Office.

The promotions data can be imported in two ways:

- Automatically: You can load promotions directly from the cash register.
- Manually: You can import promotions from a set of files in the XML format stored locally.

Promotions import is also launched when you automatically fill an empty Price Book from the cash register. For details, see Filling Out Empty Price Book Automatically from Cash Register.

Along with promotions data, the Import Tool pulls information about related items and items list data. Once the data is imported, the promotions become available in C-Store Office in the **Price Book** > **Promotions** section, and you can work with them as usual.

Import Limitations

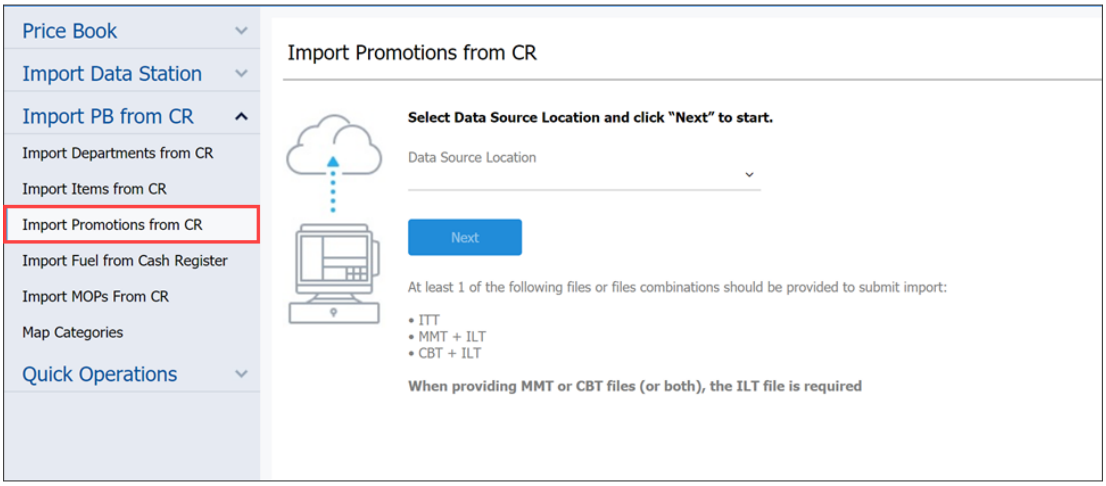
When importing promotions, mind the following limitations:

- Import of Price Reduction and Coupon promotions is not supported. Only special promotions are imported:
  - Mix&Match
  - Price Modifier
  - Price Each Mix
  - Link Saver
  - Combo
- The Import Tool does not import reimbursement data for promotions.
- The Import Tool does not import loyalty data for promotions.

Importing Fuel Data from Cash Register

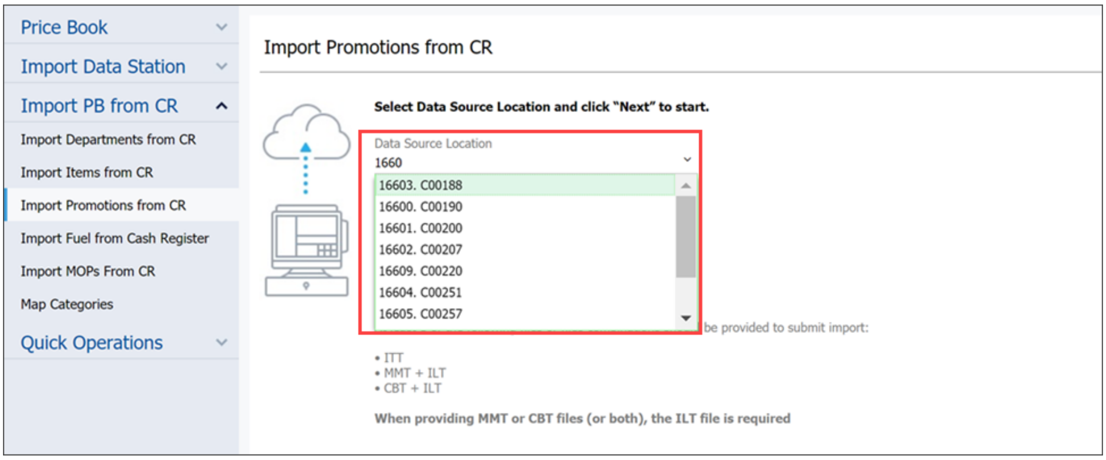
To import promotions to C-Store Office:

1. In C-Store Office, go to **Price Book** > **Import Tool**.
2. In the **Import PB from CR** section, select **Import Promotions from CR**.



3. From the **Data Source Location** list, select a location from which you want to import promotions.

   To quickly find the necessary location, in the **Type to search** field, start typing the location name. The Import Tool will display all variants that match the name you enter.



4. If you want to import promotions directly from the cash register, leave the **Auto Import** toggle in the On position and click **Next**.

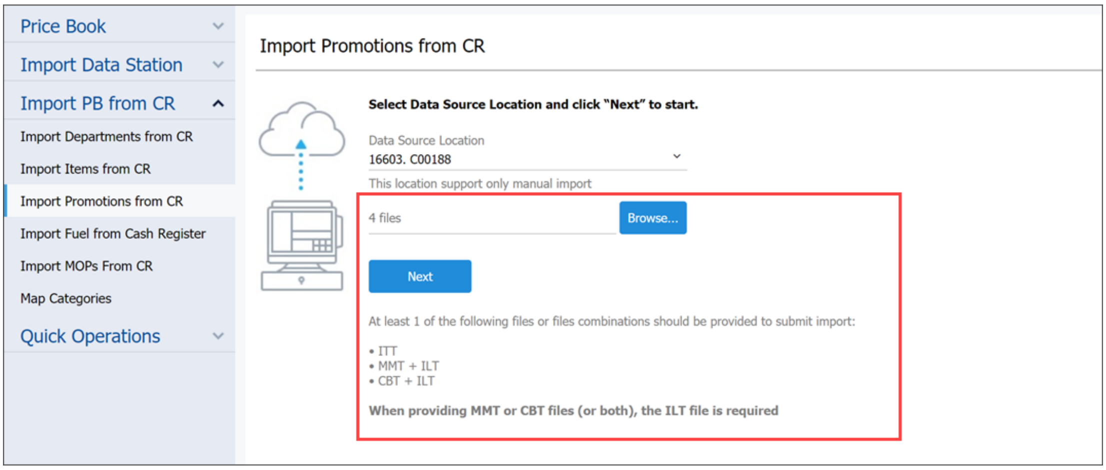
   If you want to import promotions from a set of XML files, set the **Auto Import** toggle to the Off position, then click **Browse** and select the files from which the promotions data must be imported. You can use the following files:

   - **Item Maintenance (ITT.xml)**: This file contains data elements that need to be sent from the back-office system to the POS system to enable an item to be sold at the POS terminal.

- **Item List Maintenance (ILT.xml)**: This file contains data elements that need to be sent from the back-office system to the POS system to designate items to be included in the Mix-Match or Combo pricing scheme.
- **Mix-Match Maintenance (MMT.xml)**: This file contains data elements that need to be sent from the back-office system to the POS system to properly identify and price items in the Mix-Match scheme.
- **Combo Maintenance (CBT.xml)**: This file contains data elements that need to be sent from the back-office system to the POS system to properly link and price items sold in the Combo scheme.

Mind that the file set you select must match one of the file combinations listed below:

- ITT.xml
- CBT.xml and ILT.xml
- MMT.xml and ILT.xml
- CBT.xml and MMT.xml and ILT.xml

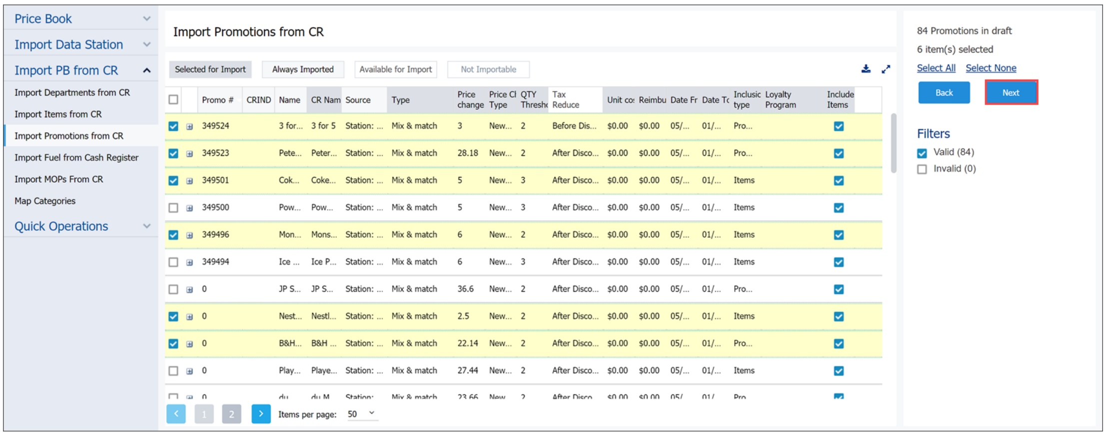


5. Once the necessary location and files are selected, click **Next**.

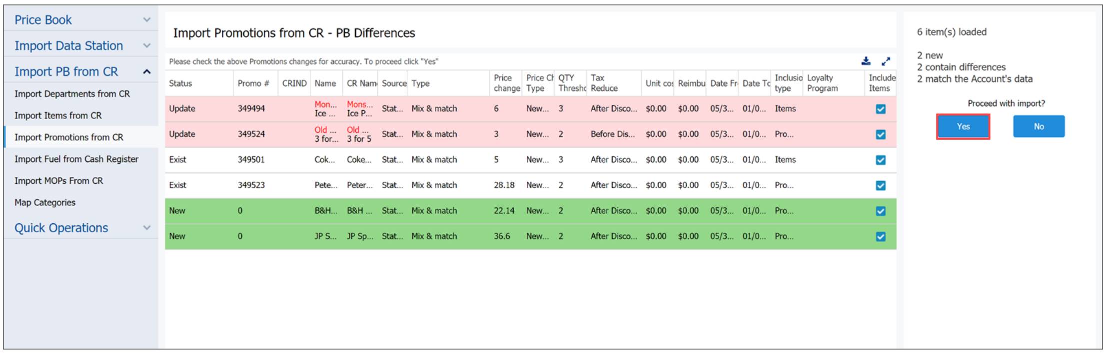
   Result: The promotions data is loaded in the Import Tool draft.

   When the Import Tool loads the promotions data, it validates the loaded data and filters the promotions as valid or invalid. Invalid promotions are not imported to the system. For more details, see Validating Objects Data.

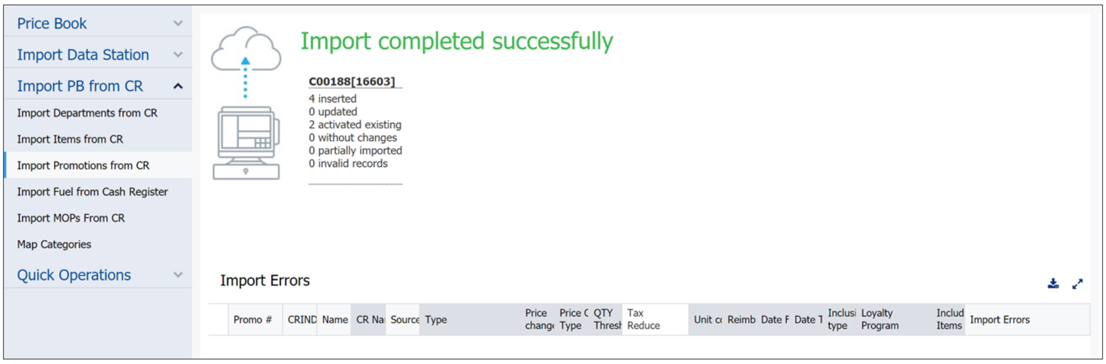
6. Review the imported data and edit it, if needed. For example, you may want to update the promotion name, set the price change, select the loyalty program and so on.
7. In the promotions list, select check boxes next to the promotions whose data you want to import and in the right pane, click **Next**.



8. The Import Tool compares the promotions data in the draft and promotions data in C-Store Office and displays the results in the following way:
   - New promotions are highlighted in green.
   - Promotions whose data was updated and is different from the promotions in C-Store Office are highlighted in red. The text in updated fields is displayed in red.
   - Promotions that already exist in C-Store Office and whose data does not differ from the promotions in the draft are not highlighted.
9. Review the promotions comparison list and in the right pane, click **Next** to proceed. To cancel the import process, click **No**.



9. At the next step, the Import Tool imports the promotions data from the specified location or set of files to C-Store Office. The import process takes a while. Once the promotions data is imported, the Import Tool displays a brief summary with the import results.



To finalize the import process, you can do the following:

- Export the list of errors that have occurred during the import process. To do this, in the **Import Errors** list, select check boxes next to the errors you want to export and at the top right of the list, click the **Download** icon.
- Close the Import Promotions from CR module. To do this, in the right pane, click **Close**.

Import Fuel from Cash Register

The **Import Fuel from Cash Register** module of the Import Tool allows you to pull information about fuel products and their settings from the cash register and import it to C-Store Office. You can use this module to quickly synchronize fuel data between cash registers and C-Store Office by locations.

The Import Fuel from Cash Register module is supported only by the following cash registers:

- Verifone Ruby/Sapphire
- Verifone Ruby/Topaz
- Verifone Ruby Commander
- Gilbarco Passport

You can import the following fuel data to C-Store Office:

- Set of fuel products
- Information about fuel grades
- Tank settings
- Fuel tier pricing

Fuel data can be imported in two ways:

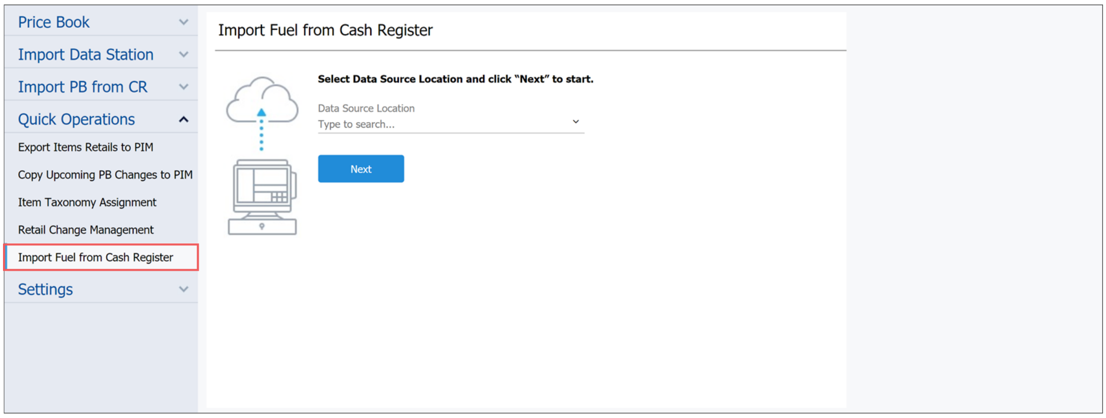
- Automatically: You can load fuel data directly from the cash register.
- Manually: You can import fuel data from a set of files in the XML format stored locally.

Fuel data is imported from the cash register or files as an entire set. Once the data is imported, it becomes available in C-Store Office and you can work with it as usual.

Importing Fuel Data from Cash Register

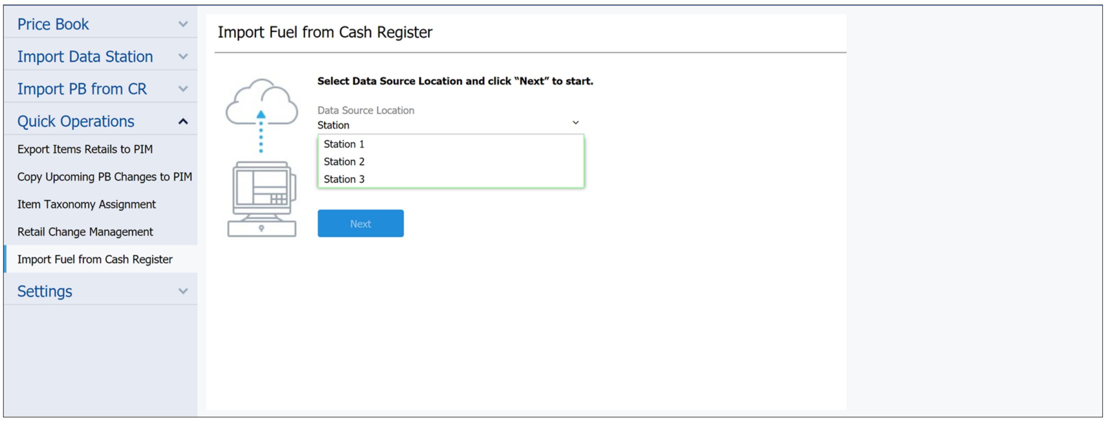
To import fuel data to C-Store Office:

1. In C-Store Office, go to **Price Book** > **Import Tool**.
2. In the **Quick Operations** section, select **Import Fuel from Cash Register**.



3. From the **Data Source Location** list, select a location from which you want to import fuel data.

   To quickly find the necessary location, in the **Type to search** field, start typing the location name. The Import Tool will display all variants that match the name you enter.



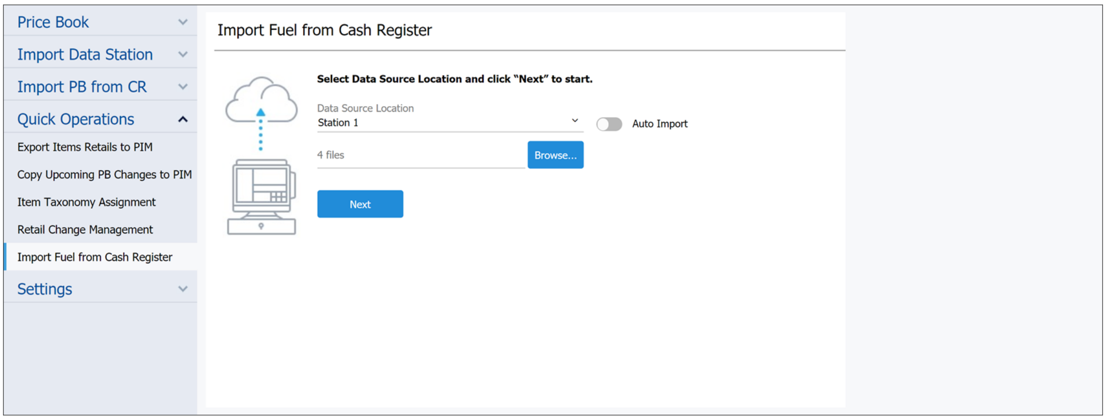
4. If you want to import data directly from the cash register, leave the **Auto Import** toggle in the On position and click **Next**.

   If you want to import data from a set of XML files, set the **Auto Import** toggle to the Off position, then click **Browse** and select the files from which data must be imported. You can import data from the following files:

- **Fuel Grade Maintenance (FGT.xml)**: This file contains information about fuel grades. The FGM.xml file is mandatory for import.
- **Fuel Product Maintenance (FPT.xml)**: This file contains information about fuel products. The FPT.xml file is mandatory for import.
- **Fuel Price Maintenance (FPM.xml)**: This file contains information about fuel grade selling for each fueling position, including the time tier, price tier and service level. The FPM.xml file is optional for import. If you want to import data from this file, you must import FGT.xml and FPT.xml files as well.
- **Tank Product Maintenance (TPT.xml)**: This file contains information about retail site tanks, including products contained in tanks, tanks capacity and other tank vital statistics. The TPT.xml file is optional for import. If you want to import data from this file, you must import FGT.xml and FPT.xml files as well.

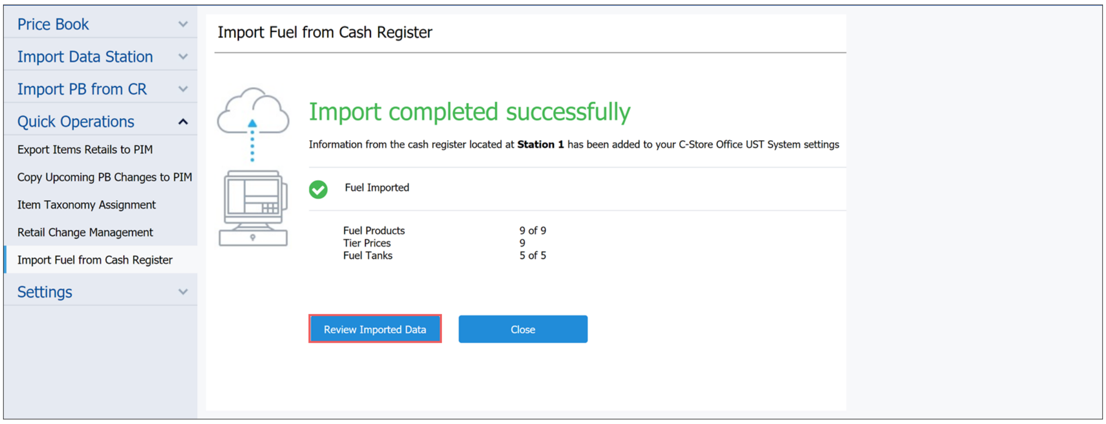
After you select the files for import, click **Next**.

> If fuel maintenance data is not available at the cash register, the Import Tool will offer only the manual data import option.

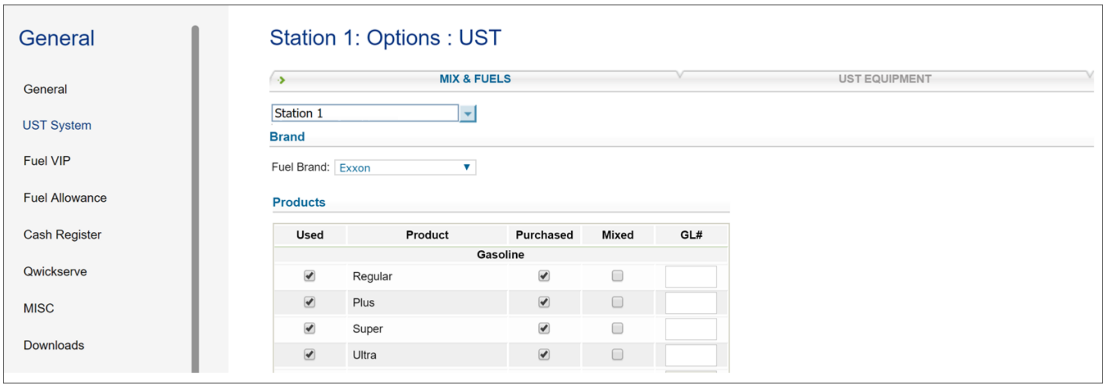


5. At the next step, the Import Tool imports the fuel data from the specified location or set of files to C-Store Office. The import process takes a while.

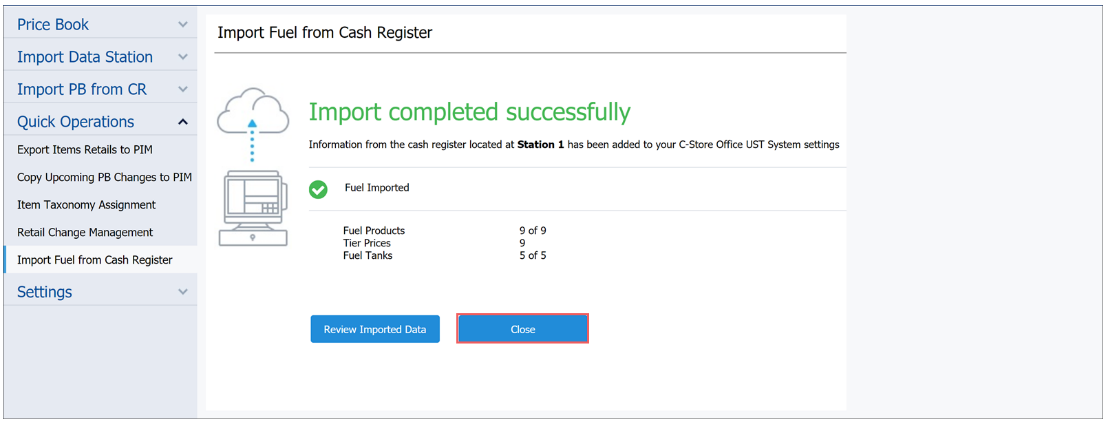
   Once the fuel data is imported, the Import Tool displays a brief summary with the import results. You can also check the import results details. To do this, click **Review Imported Data**.



Result: C-Store Office displays the form with the imported fuel information.



To close the **Import Fuel from Cash Register** module, click **Close**.



If a new fuel product is created for a location as a result of fuel data import, C-Store Office automatically reprocesses shifts that have unknown fuel sales events and updates information in these shifts.

Import MOPs from CR

The **Import MOPs from CR** module allows you to pull information about MOPs set up and used at the cash register to C-Store Office. The Import Tool automatically processes the retrieved data and maps

MOPs from the cash register to base and custom MOPs in C-Store Office. Imported MOPs become available in the **MOP Mapping** section and are further used for cash reconciliation in the system.

The Import MOPs from Cash Register module is supported only by the following cash registers:

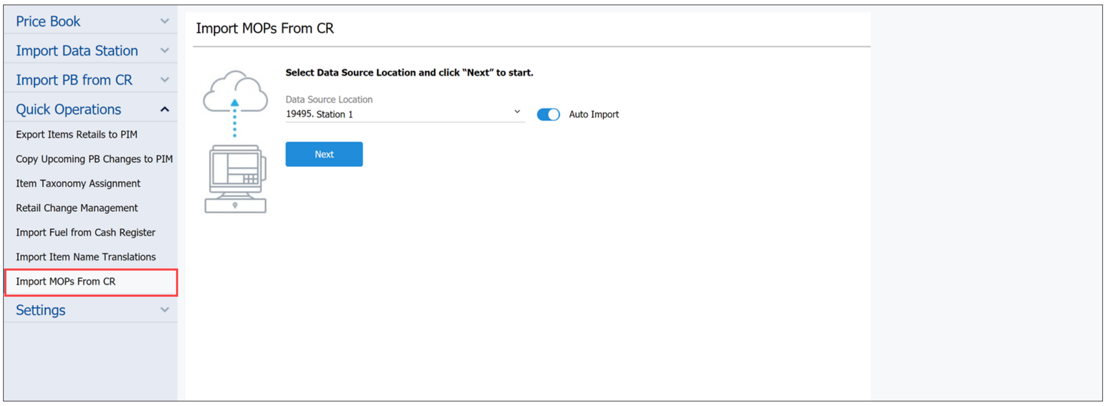
- Verifone Ruby/Sapphire
- Verifone Ruby/Topaz
- Verifone Ruby Commander
- Gilbarco Passport

You can import MOPs to C-Store Office in two ways:

- Automatically: You can load MOPs data directly from the cash register.
- Manually: You can import MOPs data from a file in the XML format stored locally.

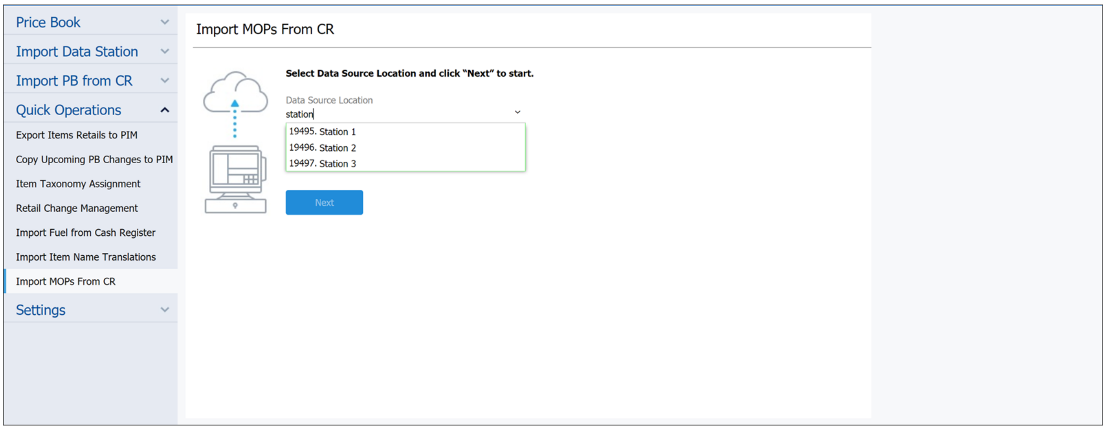
To import MOPs from the cash register to C-Store Office:

1. In C-Store Office, go to **Price Book** > **Import Tool**.
2. In the **Quick Operations** section, select **Import MOPs from CR**.



3. From the **Data Source Location** list, select a location from which you want to import MOPs data.

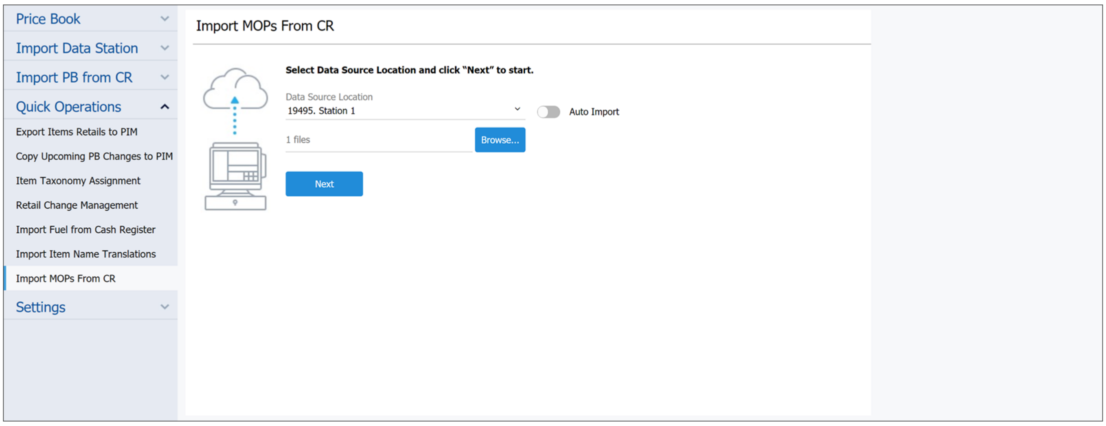
   To quickly find the necessary location, in the **Type to search** field, start typing the location name. The Import Tool will display all variants that match the name you enter.



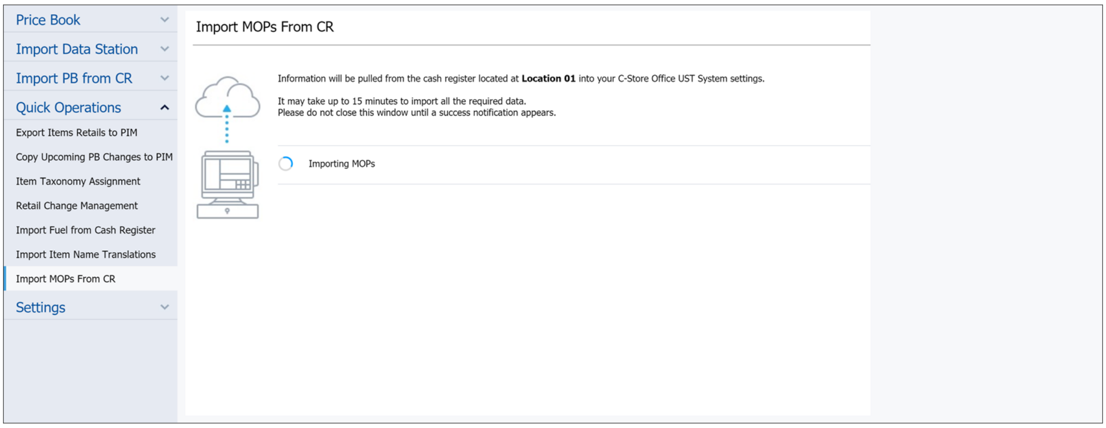
4. If you want to import data directly from the cash register, leave the **Auto Import** toggle in the On position and click **Next**.

   If you want to import data from an XML file, set the **Auto Import** toggle to the Off position, then click **Browse** and select the file from which data must be imported. Then click **Next**.

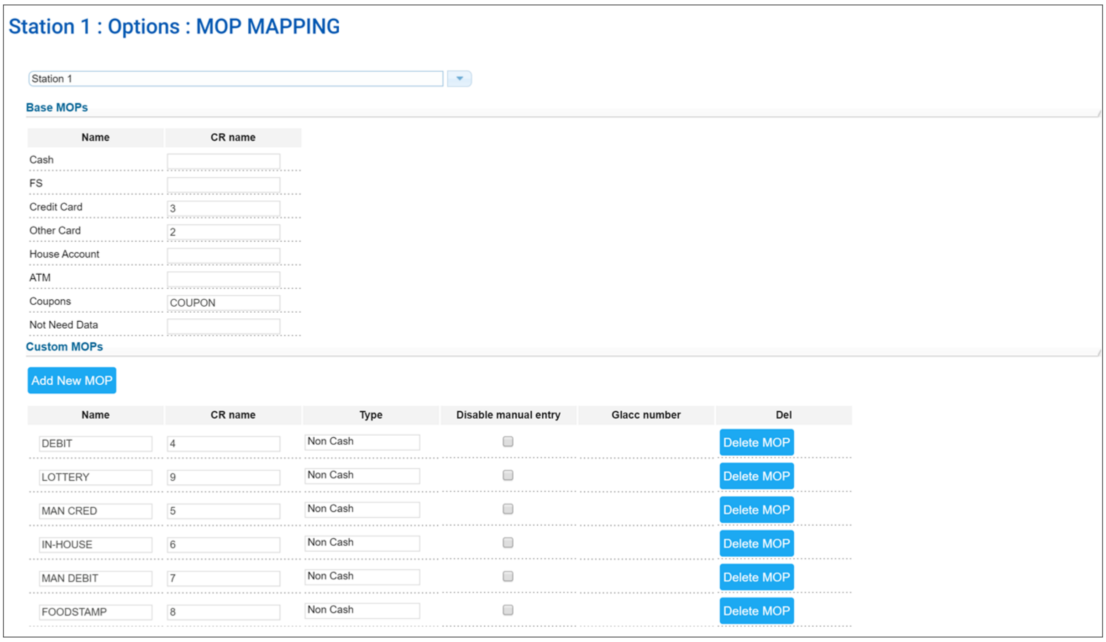
> If MOPs data cannot be imported directly from the cash register, the Import Tool will offer only the manual data import option.



5. At the next step, the Import Tool imports MOPs data from the specified location or file to C-Store Office. The import process takes a while.



Once MOPs data is imported, the Import Tool displays a brief summary with the import results. You can check the import results details. To do this, click **Review Imported Data**, and C-Store Office will display MOPs mapping information.



To close the **Import MOPs from CR** module, click **Close**.

> If a new MOP is created and/or mapped for a location as a result of data import, C-Store Office automatically reprocesses shifts that have sale events with unknown MOPs and updates information in these shifts.

Map Categories

After you import items and CR departments data to C-Store Office, you can use the Import Tool to find items that are not mapped to any categories and map these items to appropriate categories in the Price Book. You can do the same with the categories that are not mapped to any CR departments in C-Store

Office. Items and categories mapping allows you to instantly categorize items in bulk and avoid manual editing of items records.

For items and categories mapping, the Import Tool pulls information from the Golden Price Book. The Golden Price Book can be thought of as the 'Master' Price Book provided by Petrosoft. It contains etalon account master data and is used as the source for data enrichment.

How Automatic Mapping Works

Items mapping is an automatic process. It is launched immediately when you access the **Map Categories** module of the Import Tool and click **Next**.

> Automatic items mapping works only for items that are linked to CR departments in the Price Book.

Items mapping is performed in the following way:

1. When you access the **Map Categories** module and launches automatic mapping, the Import Tool finds all items that are not mapped to categories in the Account Price Book.
2. For each unmapped item, the Import Tool attempts to find an equivalent item in the Golden Price Book. To do this, the Import Tool uses item POS codes.
   - If an equivalent item is found, the Import Tool checks to which category this item belongs in the Golden Price Book. The Import Tool attempts to find the category with the same name in the Account Price Book.
     - If such category exists, the Import Tool maps the unmapped item to this category in the Account Price Book.
     - If the category does not exist, the Import Tool creates a category with the same name in the Account Price Book and maps the unmapped item to this category.
   - If an equivalent item is not found in the Golden Price Book or the category for the equivalent item in the Golden Price Book is not set, the Import Tool analyzes data of similar items to find the appropriate category for the unmapped item. To do this, the Import Tool performs the following activities:
     a. The Import Tool checks all items in the CR department to which the unmapped item belongs.
     b. If such items exist, the Import Tool checks information for these items in the Golden Price Book and detects the most commonly used category for these items belong.
     c. In the Account Price Book, the Import Tool attempts to find the category with the same name as the name of the category to which similar items belong.

If such category exists, the Import Tool maps the unmapped item to this category in the Account Price Book.

If the category does not exist, the Import Tool creates a category with the same name in the Account Price Book and maps the unmapped item to this category.

In addition to it, the Import Tool assigns the found or created category as the **MA Category** for the CR department to which the item belongs. The category is assigned only if the **MA Category** setting for the CR department is not specified.

3. If the Import Tool fails to map the item to any category, the item is added to the **Unmapped Items** group.

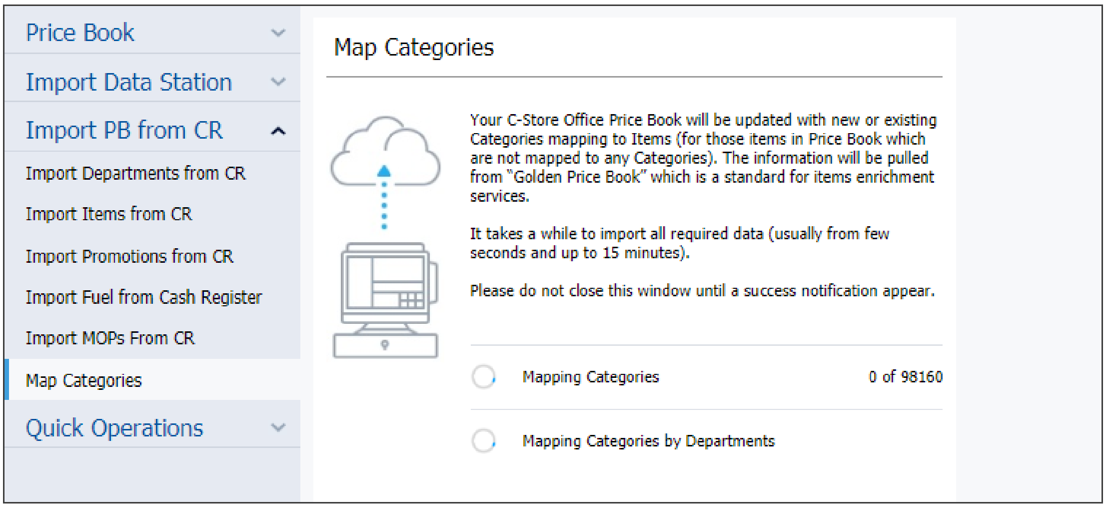
After the process of automatic items mapping is completed, all categories to which items are mapped are automatically mapped to CR departments in the same way.

Mapping Items to Categories

To automatically map items to categories:

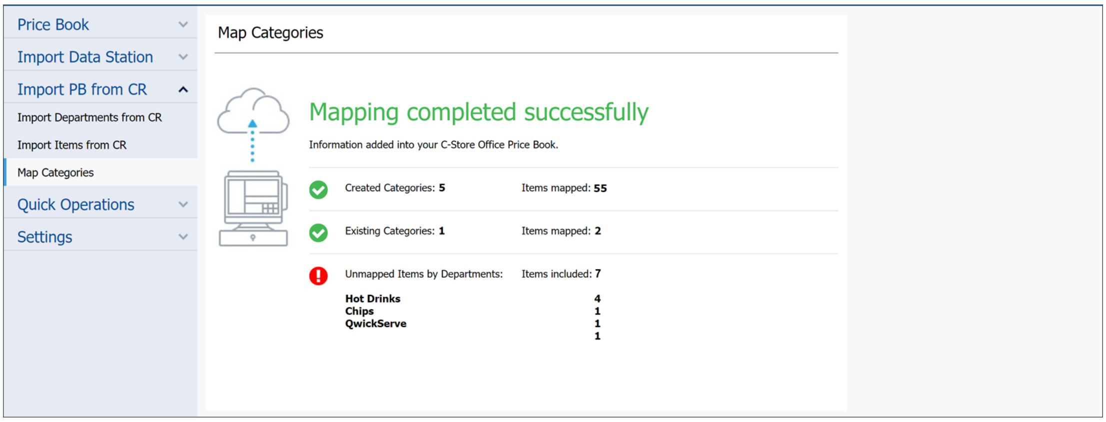
1. In Import Tool, go to **Operational Menu** > **Import PB from CR** .
2. Click **Map Categories**.
3. In the **Map Categories** form, click **Next** to launch the automatic mapping process.

   Result: The Import Tool launches the automatic mapping process. Depending on the number of items in the Account Price Book, the process can take up to 15 minutes. Do not close the **Map Categories** module until a success notification appears on the screen.



4. When finished, the Import Tool displays a form with the mapping results that contains the following information:

- **Created Categories**: The number of categories created in the Account Price Book and the number of items mapped to these categories.
- **Existing Categories**: The number of categories that already exist in the Account Price Book to which items have been mapped.
- **Unmapped Items by Departments**: The number of items that have not been categorized. The items are grouped by departments to which they belong.



To quickly edit the category setting for items added to the **Unmapped Items by Departments** group, click the department name in the results form. C-Store Office will display the items list filtered by the selected department.

Import PB from CR: Compatible Cash Registers

The price book import from cash register modules are supported by certain cash registers with some limitations listed in the Import Price Book from Cash Register Limitations table below.

Import Price Book from Cash Register Limitations

Import PB from CR Module	Cash Registers			
	Verifone Ruby/Sapphire	Verifone Ruby/Topaz	Verifone Ruby Commander	Gilbarco Passport
Import Departments from CR	–	–	–	–
Import Items from CR	–	–	–	–
Import Promotions from CR	–	–	–	–
Import Fuel from CR	+	+	+	+
Import MOPs from CR	+	+	+	+

Quick Operations

With the Import Tool, you can perform the following quick operations:

- Export Items Retails to PIM
- Copy Upcoming PB Changes to PIM
- Item Taxonomy Assignment
- Retail Change Management
- Import Item Name Translations

Export Items Retails to PIM

This form is available only for accounts assigned to the PIM module.

With the **Export Item Retails to PIM** module, you can export items retails from the C-Store Office Price Book to specific PIM locations. You can export retail data from the following sources:

- Location
- File in the CSV format

Mind the following limitations to the number of records exported at once:
- Maximum number of records containing items retails without costs is *450 000*.
- Maximum number of records containing items retails with costs for new vendors is *200 000*.

In the **Export Items Retails to PIM** you can perform the following operations:

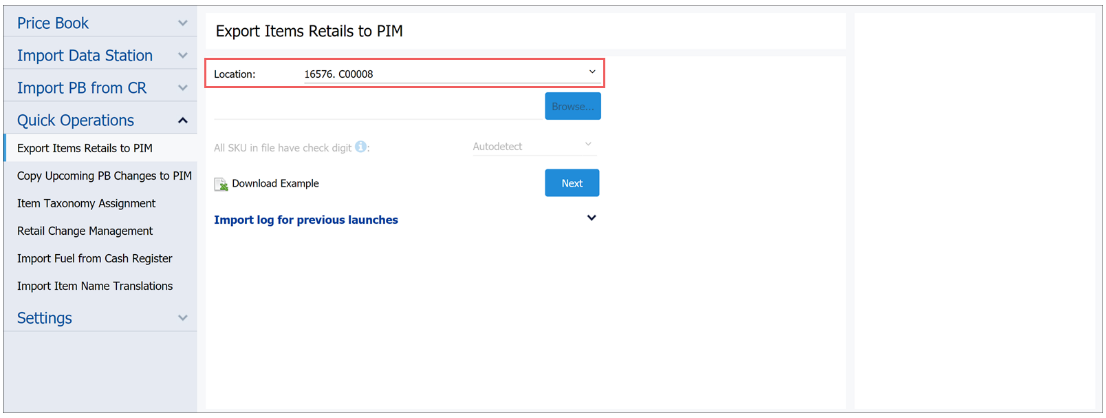
- Exporting Items Retails to PIM
- Preparing File with Items Retails Data
- Specifying Rules for Exporting Data to PIM
- Adjusting Price Book for Specific Locations
- Viewing the Export Items Retails to PIM Report

Exporting Items Retails to PIM

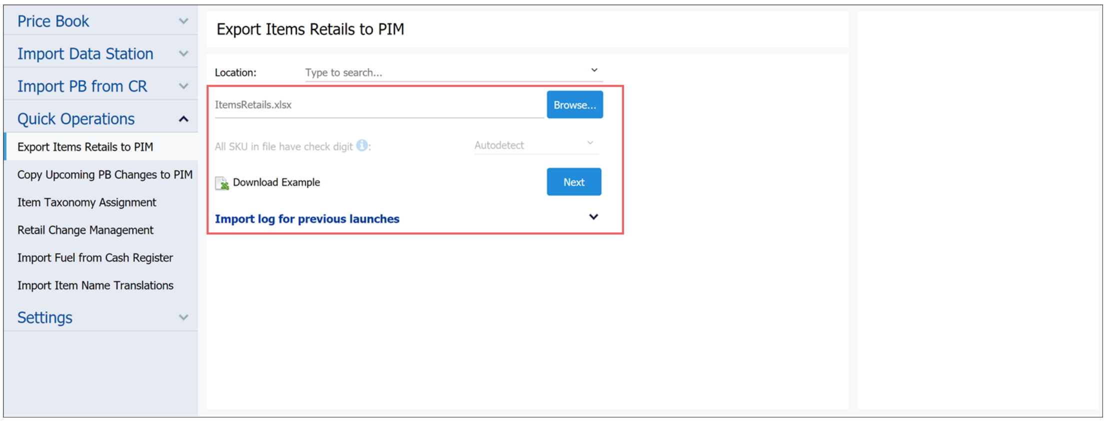
To export the items retails to PIM:

1. In the Import Tool, go to **Operational Menu** > **Quick Operations** > **Export Items Retails to PIM**.
2. At the first step, select the source from which you want to export the items retails:

- To export items retails from a location, in the **Location** list, select the location from which you want to import the items retails.

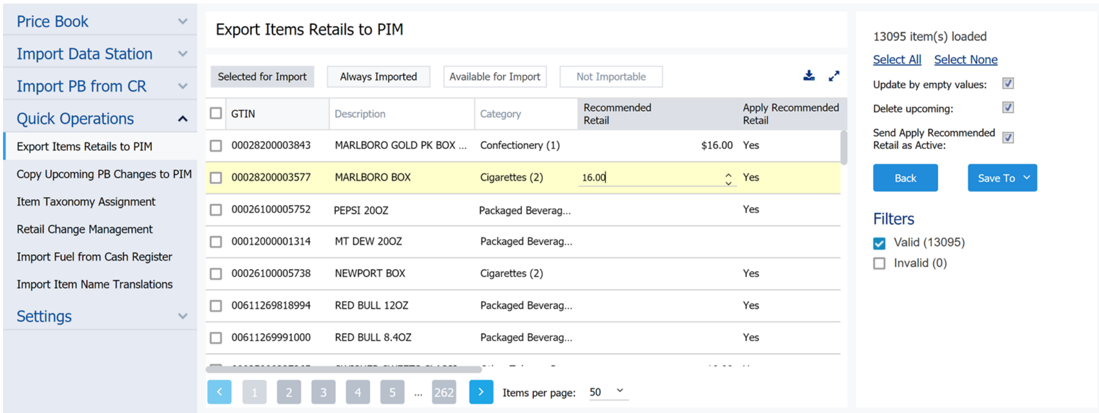


- To export items retails from a file, click **Browse** and select the file with the items retails. Then, in the **All SKU in file have check digit** list, select one of the following options:
  - **Autodetect**: Select this option if you want the Import Tool to automatically detect the SKU format.
  - **Yes**: Select this option if all SKUs in the file have the check digits. Note that if any SKUs in the file are specified without the check digit, the will not be able to recognize such items and will not export them to .
  - **No**: Select this option if at least one SKU in the file does not have the check digit. In this case, the Import Tool will ignore the check digits in SKUs.



3. At the bottom of the form, click **Next**.
4. Wait until items retails data is imported to the buffer table.
5. If necessary, update the data in the buffer table. For example, you can do the following:
   - Update the item's retail data: In the column with retail or cost data, click the item value and enter a new value.
   - Update the item status: In the **Status** column, select the item status — Active or Delisted.

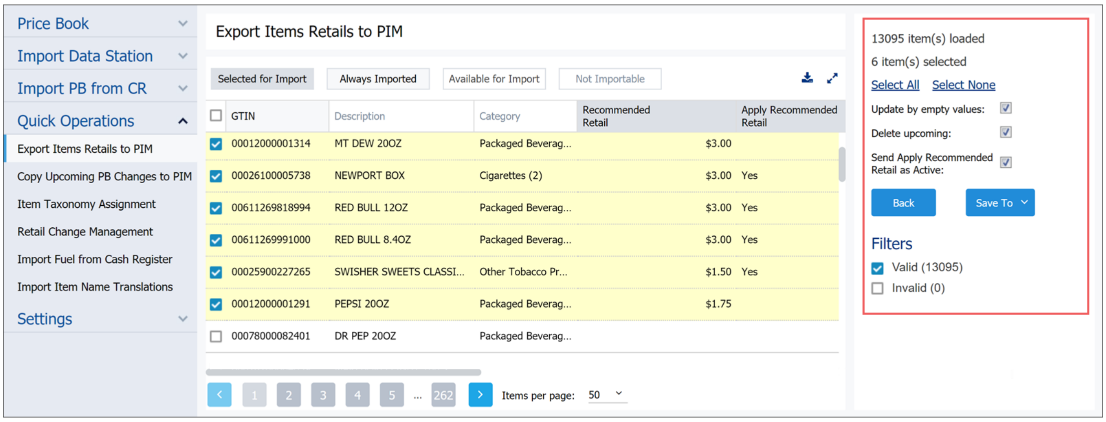
- Remove the item from the list: In the last column, hover over the row with item you need to delete and then click the **Remove** icon.
- Forbid the recommended retail price change for the item: In the **Apply Recommended Retail** column, select the necessary value.



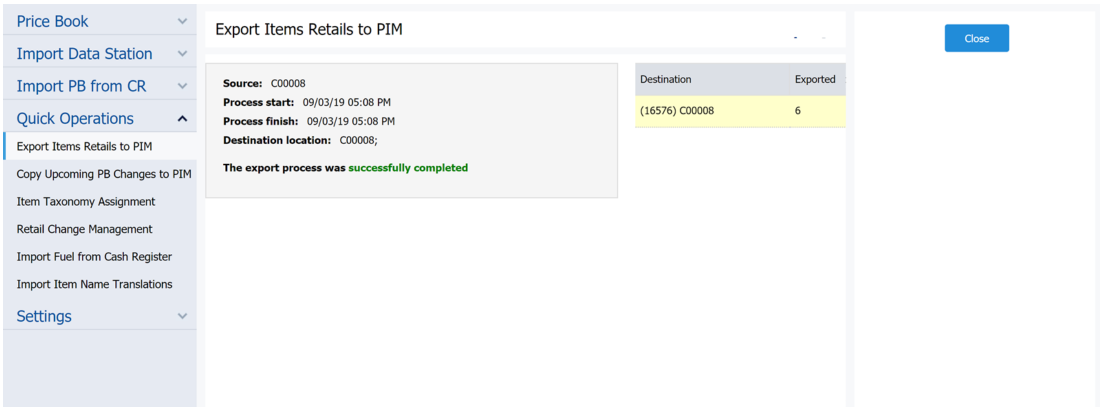
5. In the draft, select check boxes to the left of items whose retails you want to export.
6. In the right pane, specify the data export options:
   - **Update by empty values**: Use this option to replace existing values in the destination locations with empty values set for items in the draft.
   - **Delete upcoming**: Use this option to delete upcoming retail values in the destination locations.
   - **Send Apply Recommended Retail as Active**: Use this option to forcibly set the **Apply Recommended Retail** option to enabled for items in the destination locations. With this option enabled, the Import Tool will also export the **Recommended Retail** value for items whose data is exported.
7. To the right of the **Save To** button, click the drop down list.
8. Select the locations to which you want to export items retails. You have the following export options:
   - You can export the item retails by tags. To do this, in the tags tree, select the necessary tags. As a result, the item retails will be exported to all locations to which this tag is assigned.
   - You can export the item retails to a specific location or locations. To do this, expand the tags tree and select locations to which you want to export the item retails. The list of locations under tags contains only those locations to which your account is subscribed.

> To quickly find the necessary tag or location, use the search field at the top of the tags tree: enter at least three first characters of the tag name and press **ENTER** on the keyboard.

9. Click the **Save To** button.



10. Wait until the retails of the selected items are exported to PIM. The import status is displayed at the top of the form.



For more information on how to view the import status, see Viewing the Export Items Retails Report.

Preparing File with Items Retails Data

To export the items retails to PIM from a file, fill this file with the items retails data based on the rules below.

Items that don't meet these conditions will not be exported.

- **SKU**: Item barcode.
- **SKU Type**: Item barcode type. Following are the values used for the supported code types:
    - **0**: Used for the UPC-A code.
    - **1**: Used for the UPC-E code.
    - **2**: Used for the EAN-8 code.
    - **3**: Used for the EAN-13 code.

  - **4**: Used for the PLU code.
  - **5**: Used for the GTIN code.
  - **6**: Used when no other code is specified for the item.
- **Name**: Item name. This field is used for information purposes only, its value will be displayed but will not be imported or processed.
  The **SKU**, **SKU Type**, and **Name** values of each item in the file must match exactly the item SKU, SKU type and name in C-Store Office.
- **Recommended Retail**: Item recommended retail value.
- **Recommended Retail Start Date**: A date from which the new Recommended Retail value must be applied. If this field is not empty, this means that the Recommended Retail is an upcoming value.
- **Min/Max Recommended Retail**: Item Min/Max retail value. During data loading, the system validates loaded information using the following rules:
  - Min Retail <= Current Retail, Recommended Retail
  - Max Retail >= Current Retail, Recommended Retail

  > If these conditions are not met, the corresponding record will be marked red and shown at the top. Users can correct the data to be sent to PIM. After correcting the data in the fields and saving it, the data is re-validated.

  > The item's barcode or code, in case of error, cannot be updated manually. To upload these items to PIM, you need to correct the code value in the file and upload it again.

- **Min-Max Recommended Retail Start Date**: A date from which the new Min Retail/Max Retail values must be applied. If the field is not empty, this means that Min Retail and Max Retail are upcoming values.
- **Apply Recommended Retail**: Select one of the following two options:
  - **0:** The recommended retail is applied for the selected stations, but not sent to the cash registers. This value is selected by default.
  - **1:** The recommended retail is applied for the selected stations and sent to the cash registers.
- **Negotiated Cost**: Item cost value.
- **Negotiated Cost Start Date**: Date from which the new Cost value must be applied.
- **Vendor ID**: Vendor identifier for the provided negotiated cost value.
- **Vendor**: Vendor name for the provided negotiated cost value. This field is mandatory if the **Negotiated Cost** value is provided.

- **Vendor GL#**: Vendor GL account number for the provided negotiated cost value.
- **Vendor Tax ID**: Vendor Tax ID for the provided negotiated cost value.
- **VIN**: Vendor identification number for the item.
- **Units in Case**: The number of items in a package or set from the vendor.
- **Status**: Item status. Possible values:
  - **0**: Item will be active for sale.
  - **1**: Item will be inactive for sale.

  The status will be applied:
  - Immediately, if the Status Start Date field is empty
  - From the Status Start Date, if that field is not empty.
- **Status Start Date**: Date from which the new Status value must be applied.

> For date fields, you can use date formats with any separators.

Specifying Rules for Exporting Data to PIM

When you export item retails to PIM, you can define data export rules. Rules dictate the Import Tool which values must be exported and which values must be skipped. For example, you can select to export a value only if the target field for the value is empty. Alternatively, you can select to export a value only if it is greater than the target one.

> In case of exporting multiple item's costs from different vendors, a separate file for each vendor should be imported.

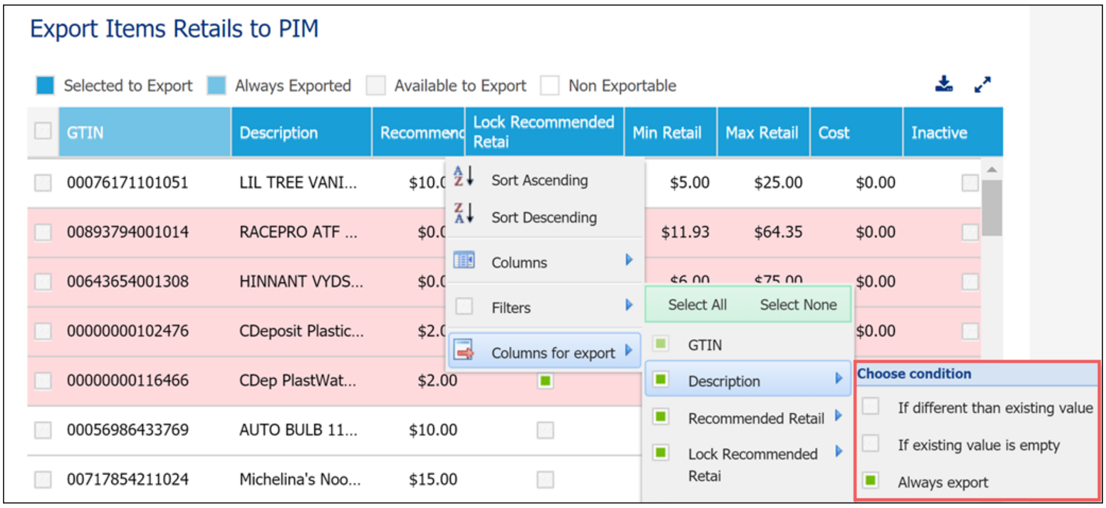
Export rules are set up separately for every field at the column level. By default, export rules are set to **Always export** for all columns, that is, values from the Import Tool are exported to PIM in any case.

To set up an export rule for a column, follow the steps:

1. In the Import Tool, load the necessary data from a location or file to the draft. For more details, see Exporting Items Retails to PIM from Location and Exporting Items Retails to PIM from a File.
2. In the draft table, right-click the necessary column and select **Columns for export**.
3. In the displayed list, select the necessary column and then select the condition for data export:
   - **If different than existing value**: Select this option, if the column data must be exported only if values in the draft are different from values set up in PIM.

- **If existing value is empty**: Select this option, if the column data must be exported only if values in PIM are not set up.
- **Always export**: Select this option, if the column data must be exported in any case, no matter which values are set up in PIM.

4. Proceed to exporting data to PIM as described in the procedures above.



Adjusting Price Book for Specific Locations

In PIM, you set up the Price Book items data for a group of locations having the same tag at once. In some cases, however, the Price Book data in a specific location may differ from the data in other locations. For example, you may need to exclude some items from the Price Book in a certain location and keep these items in other locations having the same tag.

The Import Tool allows you to manually adjust the Price Book data for individual locations in the Export Items Retails to PIM draft. After you adjust the data, you can export it to the necessary location or locations in PIM.

To adjust the Price Book data, you can use the following options:

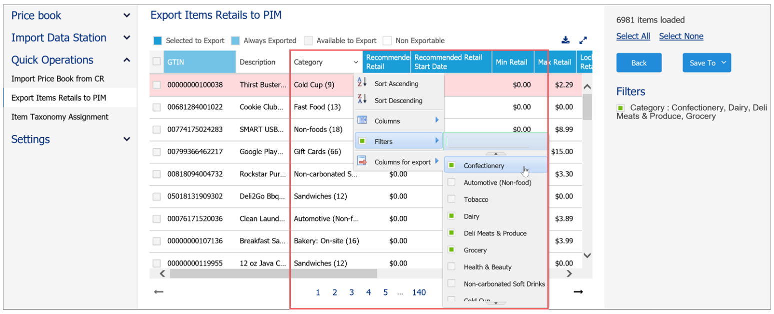
- Filter Price Book items by categories
- Delete several items at once
- Export filtered data to Excel

Filtering Price Book Items by Categories

You can filter the Price Book items by categories. As a result, the Export Items Retails to PIM draft will display only those items that match the specified criteria. After you apply the filter to the draft, you can manipulate the items in the list the way you need.

To filter the Price Book items by categories, follow the steps:

1. In the Import Tool, load the data from the necessary location. For more details, see Exporting Items Retails to PIM from Location.
2. In the draft table, click the arrow icon on the right of the **Categories** column and select **Filters**.
3. In the text field on the right, specify the criteria by which you want to filter items:
   - If you want to display items that belong to a specific category, enter the category number or its name in the text field. The Import Tool will filter data using the 'Like' condition: that is, will display the items that belong to categories having the specified text in the category number or category name fields.
   - If you want to display items of all categories, leave the text field empty.
4. Press **ENTER** on the keyboard.



Result: The draft displays only those items that belong to the categories matching the filter.

Deleting Several Items at Once

You can delete several items from the draft at once. For example, you may need to remove items that belong to a specific category from the Price Book in a specific location. In this case, you can filter the items by this category in the draft, delete the unwanted items in one click and then export data to the necessary location in PIM.

To delete several Price Book items at once, follow the steps:

1. In the Import Tool, load the data from the necessary location. For more details, see Exporting Items Retails to PIM from Location.
2. In the draft table, select the check boxes on the left of items that you want to remove from the draft.
3. On the right of any selected item line in the table, click the **Remove** icon and then confirm the items deletion.
   Result: All selected items are removed from the draft at once.

Exporting Filtered Data to Excel

After you have filtered the data by categories, you can export the filtered items data to Excel. You can use the exported data for further analysis. Or you can adjust the items data manually in the Excel file and then re-import it to the Import Tool.

To export the filtered items data, follow the steps:

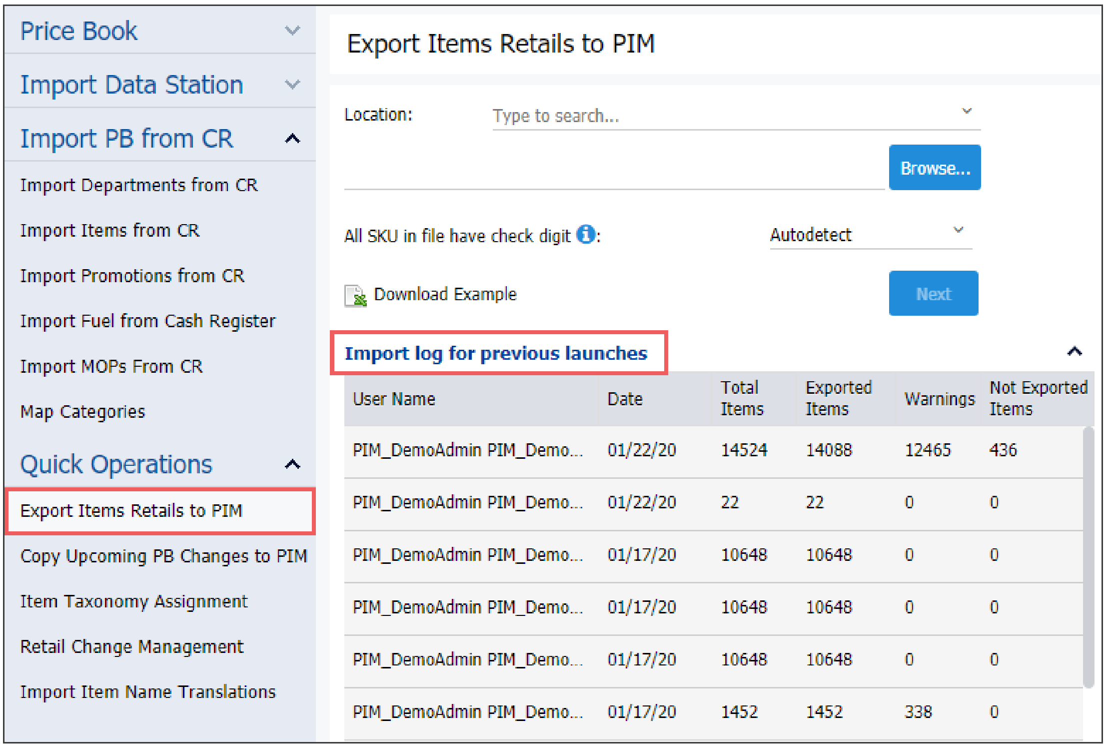
1. In the Import Tool, load the data from the necessary location. For more details, see Exporting Items Retails to PIM from Location.
2. Filter the items data by the necessary category or categories. For more details, see Filtering Price Book Items by Categories.
3. In the draft table, select the check boxes on the left of the items that you want to export.
4. At the top right corner of the draft table, click the **Export to Excel** icon.
   Result: Data of the selected items is exported to an Excel file, and the file is downloaded to the default downloads folder.

Viewing the Export Items Retails to PIM Report

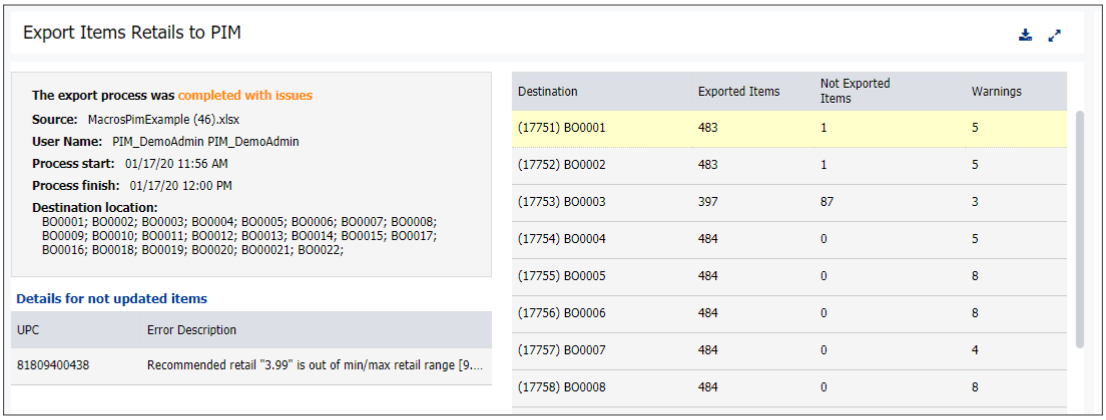
In the Export Items Retails to PIM report, you can view the history of exported items retails to PIM.

To open the Export Items Retails to PIM report in Import Tool:

1. Go to **Quick Operations** > **Export Items Retails to PIM**.
2. In the **Export Items Retails to PIM** form, click **Import log for previous launches**.
   Result: The list with short summary about each previous data export to PIM is displayed.



3. In the **Import log for previous launches** list, you can see the following information about each previous data export to PIM:
   - **User Name**: The name of the user who performed the data updates and export.
   - **Date**: The date of the data export.
   - **Total Items**: The number of the updated items that were sent to export.
   - **Exported Items**: The number of items that were finally exported.
   - **Warnings**: The number of warnings displayed during the export.
   - **Not Exported Items**: The number of items that were not exported.
4. To view more details about each data export, in the **Import logs for previous launches** list, click the row with the short summary you need.



5. In the **Export Items Retails to PIM** form, view the following detailed information about the selected data export:
   - Export process general information, which includes the following data:
     - **The export process was**: The export process status.
     - **Source**: The name of the file from which the data was exported.
     - **User Name**: The name of the user who performed an export.
     - **Process start**: The export starting date and time.
     - **Process finish**: The export ending date and time.
     - **Destination location**: The location to which the data was exported.
   - Export details for each location with the following data:
     - **Destination**: The identifier and name of the location to which the data was exported.
     - **Exported Items**: The number of items that were actually exported.
     - **Not Exported Items**: The number of items that were not exported.
     - **Warnings**: The number of warnings received during export.
   - Details for not updated items: In list of destination locations on the right, select the location for which you want to see the detailed information about the items that were not exported. In the details for not updated items table, the following information about each item that was not exported is displayed:
     - **UPC**: The UPC code of the item that was not exported.
     - **Error Description**: The reason of why the item was not exported.

Copy Upcoming PB Changes to PIM

The **Copy Upcoming PB Changes to PIM** module of the Import Tool lets you copy upcoming changes for Price Book items between PIM locations. The list of upcoming changes that can be copied includes:

- Recommended retail changes
- Min/max retail changes
- Cost changes
- Status changes

You can copy upcoming changes for items from one source location to one or more destination locations of the same account. After the upcoming changes are copied, HO and BO managers approve these changes in the Outgoing and Incoming modules of PIM. The changes are then sent to the Updates Manager in C-Store Office, where they can be accepted manually or automatically, depending on the C-Store Office settings, and further sent to cash registers. For more details, see the Cash Register Update Manager section in the Petrosoft Cloud Help.

Copying Rules

The copying process is performed by the following rules:

- The Import Tool copies upcoming changes for items between locations of the same C-Store Office account. You cannot copy upcoming changes for items between locations of different C-Store Office accounts.
- The Import Tool copies all upcoming changes at once. You cannot select specific upcoming changes that need to be copied.
- The Import Tool does not change the current status for an item in destination location. For example, if some item is active in the source location and inactive in the destination location, this item will remain inactive in the destination location after the copying process is complete.
- The Import Tool does not copy changes for invalid items. Invalid items are items that cannot pass the following PIM validation rules:
  - The Recommended Retail value set for some date in future must fit into the range between the Min Recommended Retail and Max Recommended Retail values set for this date in the destination location.
  - The Min Recommended Retail and/or the Max Recommended Retail values set for some date in future must correspond to the Recommended Retail value set for this date in the destination location.
  - The Min Recommended Retail value set for some date in future must not be greater than the Max Recommended Retail value set for this date in the destination location.
  - The Max Recommended Retail value set for some date in future must not be less than the Min Recommended Retail value set for this date in the destination location.

Prerequisites

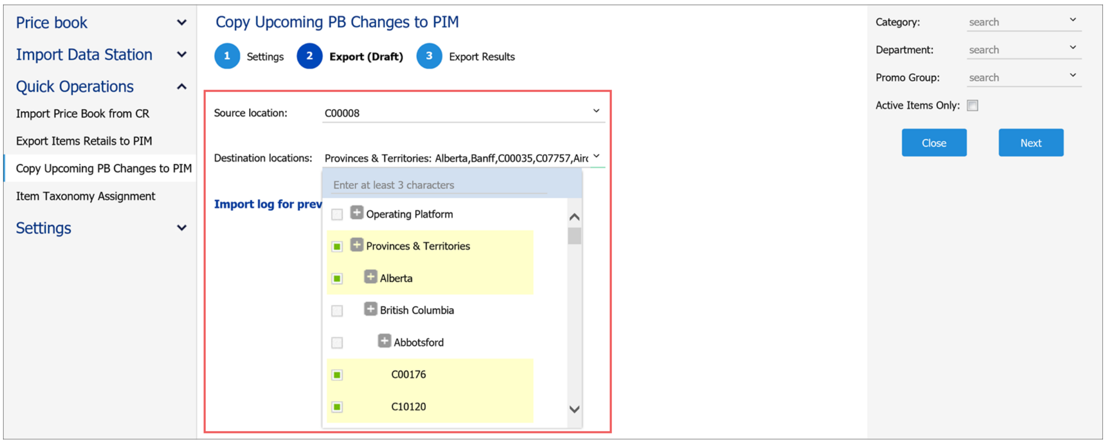
To be able to copy upcoming changes for items between locations, make sure that the following prerequisites are met:

- The PIM product is enabled for the C-Store Office account.
- The C-Store Office account is a PIM publisher.
- The **Allow access users to Copy Upcoming PB Changes to PIM Import Tool chapter** permission is granted to the user account or role assigned to the user.

Exporting Upcoming Changes

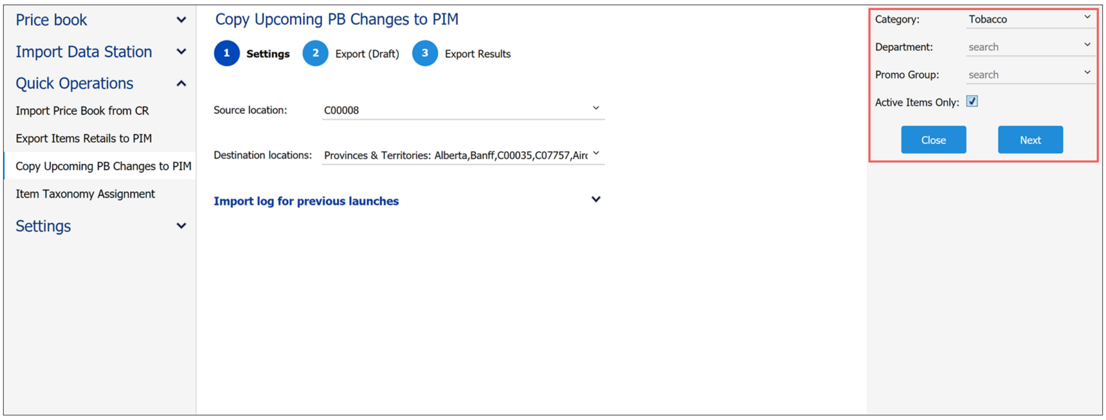
To copy upcoming changes for items between locations:

1. In the Import Tool, go to **Price Book** > **Import Tool** > **Quick Operations** > **Copy Upcoming PB Changes to PIM**.
2. At the **Settings** step, select the source and destination locations between which you want to copy upcoming changes:
   - From the **Source Location** list, select the location from which you want to copy upcoming changes. You can select only one location as the source. To quickly find the location, start typing in the location name in the **Source location** field.
   - In the **Destination Locations** list, expand the necessary tags nodes and select the check boxes next to one or more locations to which you want to copy upcoming changes. To quickly find the necessary locations, use the search field at the top of the locations lists. You can search locations by tag and location name.

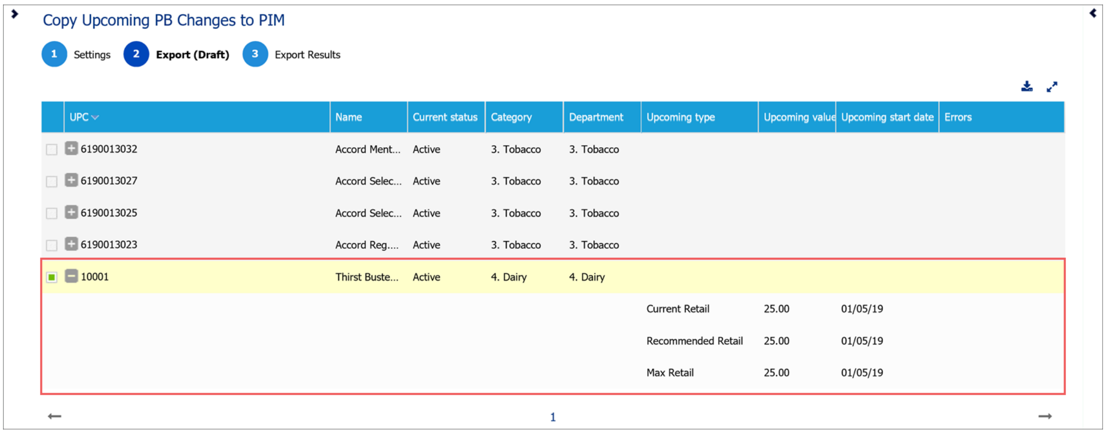


3. In the right pane of the module, set up a filter for items whose upcoming changes you want to copy. Do the following:
   - From the **Category** list, select one or more categories to which the items belong.
   - From the **Department** list, select one or more departments to which the items belong.
   - From the **Promo Groups** list, select one or more promo groups to which the items are included.

- Select the **Active Items Only** check box to copy upcoming changes only for active items.



4. In the right pane of the module, click the **Next** button.
5. At the **Export (Draft)** step, the Import Tool displays the list of items that meet the set filter and upcoming changes for these items. To view the upcoming changes of different types, expand the necessary item.



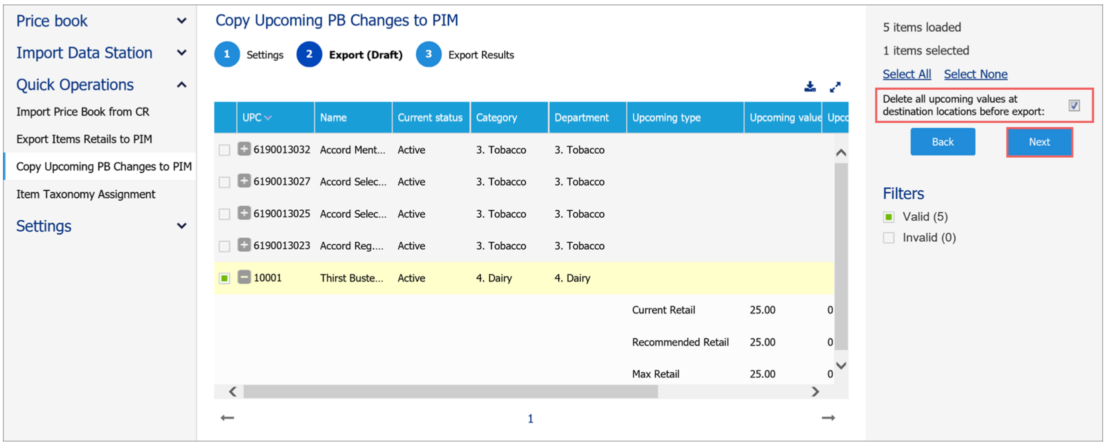
You can filter and sort items in the list. For more details, see Sorting and Filtering Items. You can also export items data to a file. For more details, see Exporting Items Data to a File.

6. In the items list, the Import Tool highlights invalid items. Detailed information about errors in data setup for each item is displayed in the **Errors** column. For more details about invalid items, see Copying Rules.

   To filter out only valid or invalid items in the list, use the filter in the right pane of the module.

7. In the items list, select check boxes next to items whose upcoming changes you want to export.
8. To delete all upcoming values for items in the destination locations before exporting, in the right pane of the module, select the **Delete upcoming price values at destination locations before export** check box.

9. In the right pane of the module, click the **Next** button.

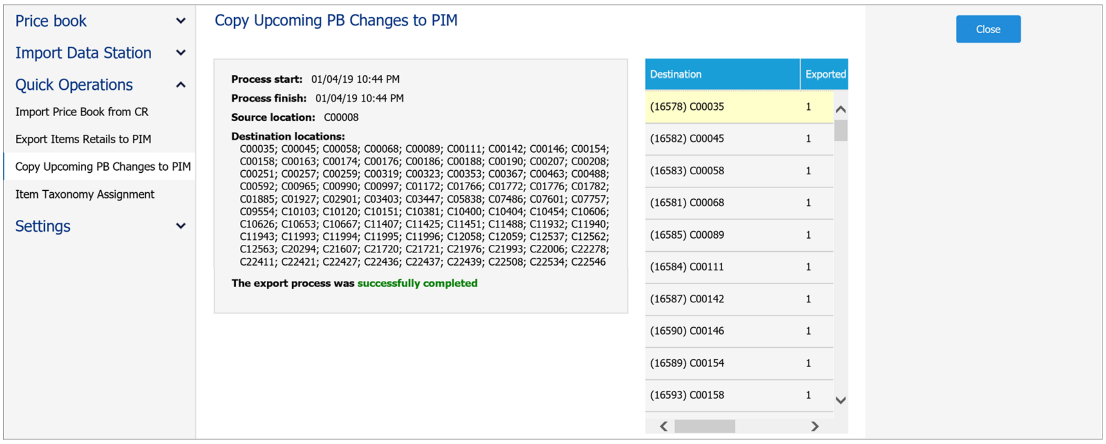


10. At the last step, the Import Tool displays the list of locations in which upcoming values for the selected items have been updated.

    At the bottom of the locations list, you can check the export status. The export process can complete with one of the following results:

    - **Successfully completed**: upcoming changes are successfully exported.
    - **Not completed**: export process has been interrupted for some reason, and the upcoming changes are not exported.
    - **Completed with issues**: export process has been completed, but some upcoming changes are not exported.

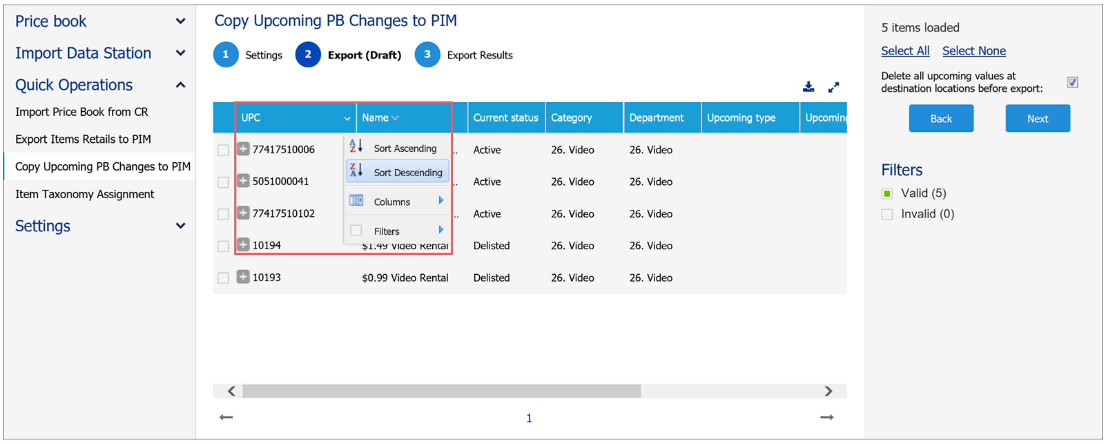
    Review the list of locations and the number of changes that have been exported and not exported for each location. In the right pane of the module, click the **Close** button to close the current import session.



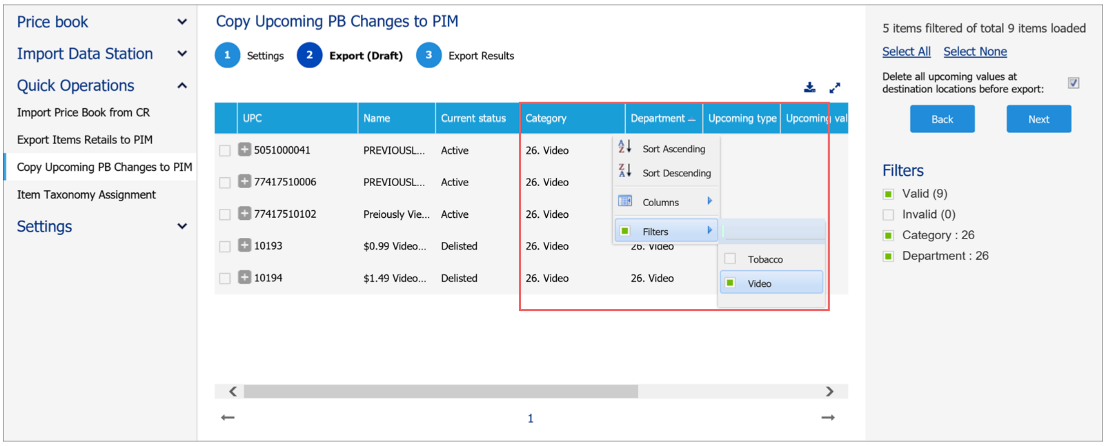
Sorting and Filtering Items

To facilitate work with items whose upcoming changes must be exported, you can sort and filter items in the items list.

- To sort items by a specific value in the ascending or descending order, click the necessary column name once or twice. Alternatively, you can click the arrow icon to the right of the necessary column and select **Sort Ascending** or **Sort Descending**.



- To filter items by a specific value, to the right of the necessary column, click the arrow icon and select the check boxes next to the values by which you want to filter the items list.



Exporting Items Data to a File

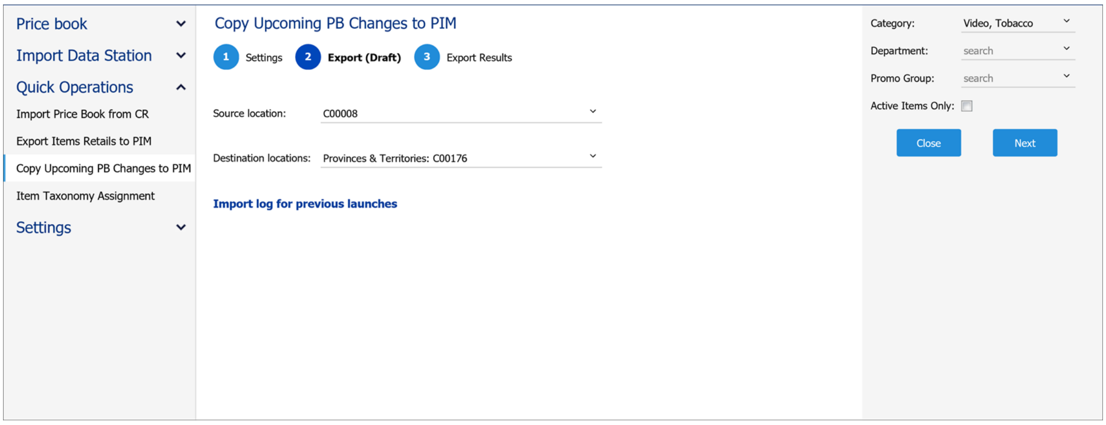
When working with the Import Tool draft, you can export items data to a file. For example, you can select all items that are marked by the Import Tool as invalid and export them to a file for correction.

For more details, see Exporting Draft Data to a File.

Viewing Export Log

The Import Tool stores results of previous import sessions for the previous 30 days. To view the import logs:

1. Go to **Price Book** > **Import Tool** > **Quick Operations** > **Copy Upcoming PB Changes to PIM**.
2. In the central pane of the module, click the arrow icon in the right of the **Import logs for previous launches** link.



Item Taxonomy Assignment

The **Item Taxonomy Assignment** module allows you to assign existing item tags to items in the Account Price Book. With this module, you can quickly categorize items in bulk. Instead of assigning tags to items manually, you can prepare a file defining to which tag this or that item relates, and import this information to the Price Book in C-Store Office at once.

Before You Begin

Before starting to assign the item tags to items, make sure the following conditions are met:

- You have prepared a file with the item taxonomy data in the correct format. For details, see Preparing File with Item Taxonomy Data.
- Items to which you are going to assign item tags exist on your account. You can check the items UPCs on your account in C-Store Office by using the Find and Replace Tool. For details, see **Price Book** > **Operational Panel (Find and Replace Tool)** > **Searching for Price Book Elements** at Petrosoft Cloud Help.
- Item tags that you are going to assign to items exist on your account. You can check the item tags existing on your account by clicking **Price Book** > **Item Tags**.

Preparing a File with the Item Taxonomy Data

To import the item taxonomy from a file, fill in this file with the item taxonomy data based on the template below.

The file must have the following data structure.

Field Name	Mandatory (Yes/No)	Description
SKU	Yes	Item code in one of supported formats: - UPCA - UPCE - EAN8 - EAN13 - PLU
SKU Type	Yes	Code type for the SKU code in the previous column. Must be one of following numbers: - UPCA = 0 - UPCE = 1 - EAN8 = 2 - EAN13 = 3 - PLU = 4
Item Name	No	Item name as appears in the C-Store Office Price Book for viewing purpose only. This field will be ignored when importing (will not be updated for the item).
Item Tag	No	Root and item tag names. Root tag names must be provided in the header, and item tags in the column cells. The quantity of root tags and columns is not limited. Item tags assigned to a particular item must be provided in the corresponding item row in a column with the corresponding root tag as the header (to which the item tag belongs). For details, see the **Data Example** sheet in the sample file.

For example, you want to assign two tags to items in the Price Book:

- Global Subcategories
- Price Zone

In this case, you must populate the file in the following way:

1. In the **SKU** column, specify the items SKU numbers.
2. In the **SKU Type** column, specify the type of the provided SKU numbers.
3. In the **Item Name** column, specify the items names. This step is optional and can be omitted.
4. In the header of the column to the right, specify the name of the root tag that you want to assign to items. In this example, *Global Subcategories*.

5. In the column fields, specify the names of tags that you want to assign to specific items. In this example, the first item will have the *Dry Grocery* tag and the second item will have the *General Merchandise* tag. Both of these tags are child to the *Global Subcategories* root tag.
6. Repeat steps 4-5 for the *Price Zone* root tag. In the header of the column to the right, specify *Price Zone* and in the column fields, provide the names of tags that you want to assign to specific items: *Zone 1* and *Zone 2*.

	A	B	C	D	E
1	SKU	SKU Type	Item Name	Global Subcategories	Price Zone
2	648436100651	0	Soup Cup Beef	Dry Grocery	Zone 1
3	774175035753	0	Hip Fashion Earphones	General Merchandise	Zone 2
4					
5					

Assigning Item Taxonomy

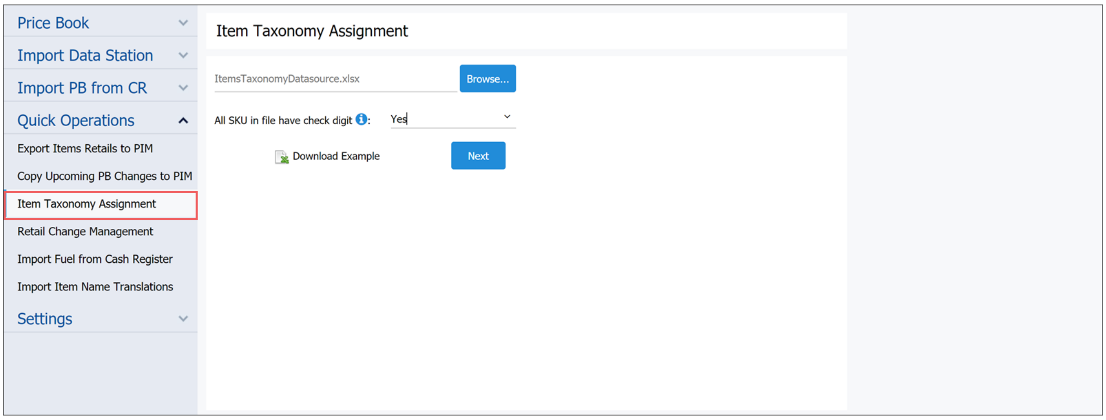
To assign item tags to items with the Import Tool:

1. In the Import Tool, go to **Operational Menu** > **Quick Operations** > **Item Taxonomy Assignment**.
2. In the **Item Taxonomy Assignment** form, click **Browse** and select the file with the item taxonomy.

   For more information on how to fill in the file, see Preparing File with Item Taxonomy Data.

3. In the **All SKU in file have check digit** list, select one of the following options:
   - **Autodetect**: Select this option if you want the Import Tool to automatically detect the SKU format.
   - **Yes**: Select this option if all SKUs in the file have the check digits. Note that if any SKUs in the file are specified without the check digit, the Import Tool will not be able to recognize and locate such items in the database.
   - **No**: Select this option if at least one SKU in the file does not have the check digit. In this case, the Import Tool will ignore the check digits in SKUs.

4. Click **Next**.



5. Wait until the item taxonomy is uploaded from the file to the buffer table. In the buffer table, review the item taxonomy before importing it to the account.

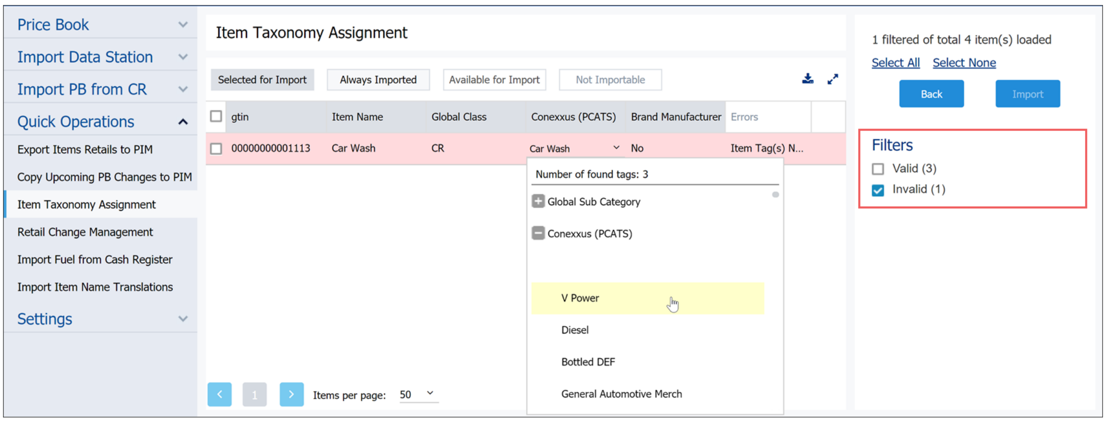
At this step, the Import Tool validates the data loaded from the file. Items with errors are displayed in the invalid items list. To view the list of invalid items, in the right pane of the **Item Taxonomy Assignment** form, under **Filters**, select **Invalid**.

The Import Tool marks items as invalid in case the following errors occur:

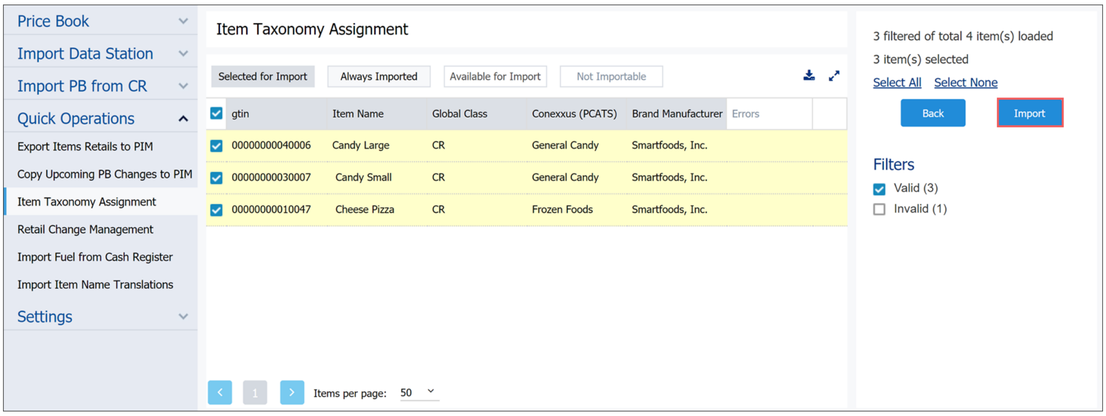
- The item UPC is not found or the UPC is specified in the wrong format. To fix this error, correct the item UPC in the file used for data import and re-import the data to the Import Tool.
- The item tag does not exist under the root tag. To fix this error, in the buffer, click the necessary tag value and from the tags list, select the tag that you want to assign to the item.

The error description is specified in the **Errors** column. To see the error description, you can also hover the mouse cursor over an invalid item.

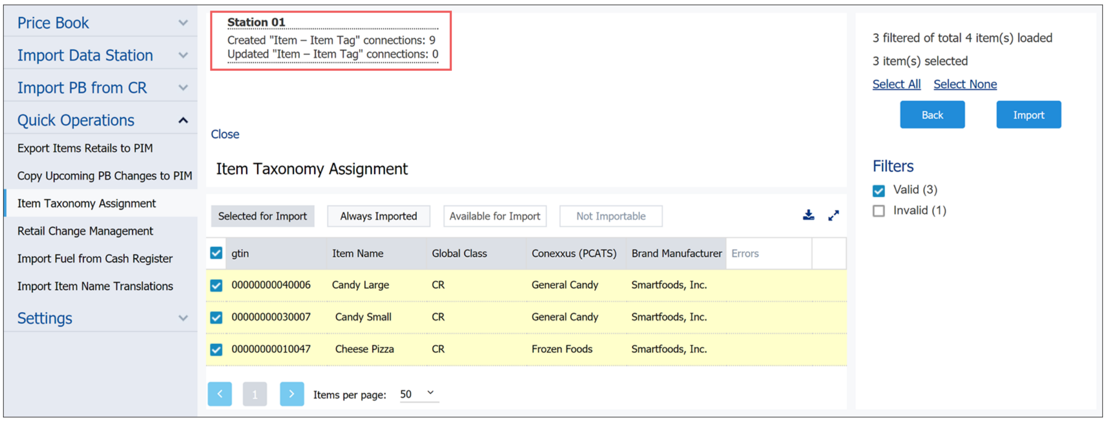
> Taxonomy data for invalid items is not imported to the Price Book.



6. If necessary, update item tags for the uploaded taxonomy. You can perform the following actions:
   - Assign a new item tag to the item. In the tag column, click the item tag name and then in the tags tree, select a new item tag.
   - Remove an item from the buffer table. Hover the mouse cursor over the item and then in the right column, click the **Remove** icon.
7. Select the items whose taxonomy you want to import and then in the **Data Sources** panel, click **Import**.



8. Wait until the item taxonomy is imported. The import status is displayed at the top of the table.



Exporting Items Data to a File

When working with the Import Tool, you can export items data to a file. For example, you can select all items that are marked by the Import Tool as invalid and export them to a file for correction.

For more details, see Exporting Draft Data to a File.

Retail Change Management

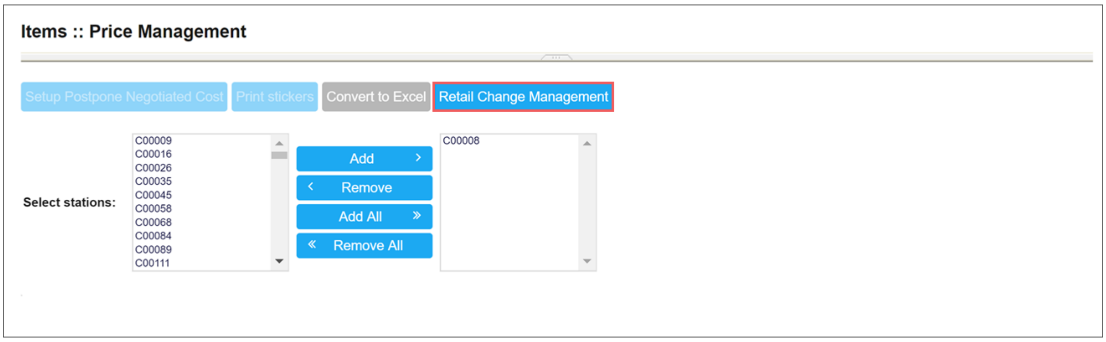
The **Retail Change Management** module of the Import Tool lets you analyze GPM and conveniently set up optimal pricing in the stores. You can use this module to perform the following activities:

- Understand the store GPM based on:
  - Negotiated cost and max recommended retail
  - Current retail and actual, promotion or negotiated cost
  - New current retail and negotiated cost
- Change retail prices for items in bulk
- Analyze the projected GPM based on the new current retail before making changes in the Price Book

Working with GPM and Retail Prices

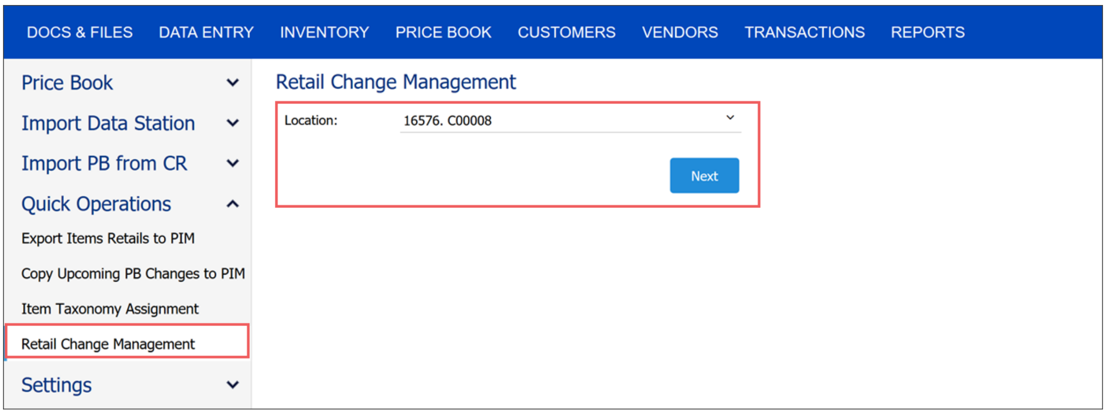
To analyze GPM and work with retail prices in the Import Tool:

1. Go to **Price Book** > **Items**. In the **Items** form, click **Price Management** and then in the **Items : Price Management** form, click **Retail Change Management**.



If you have access to the Import Tool, you can also go to **Price Book** > **Import Tool** > **Quick Operations** > **Retail Change Management**.

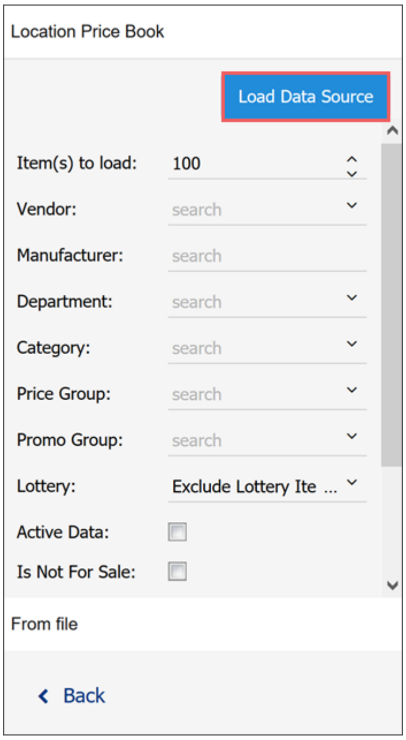
2. At the **Location** step, select the location whose data you want to analyze and change and then click **Next**.



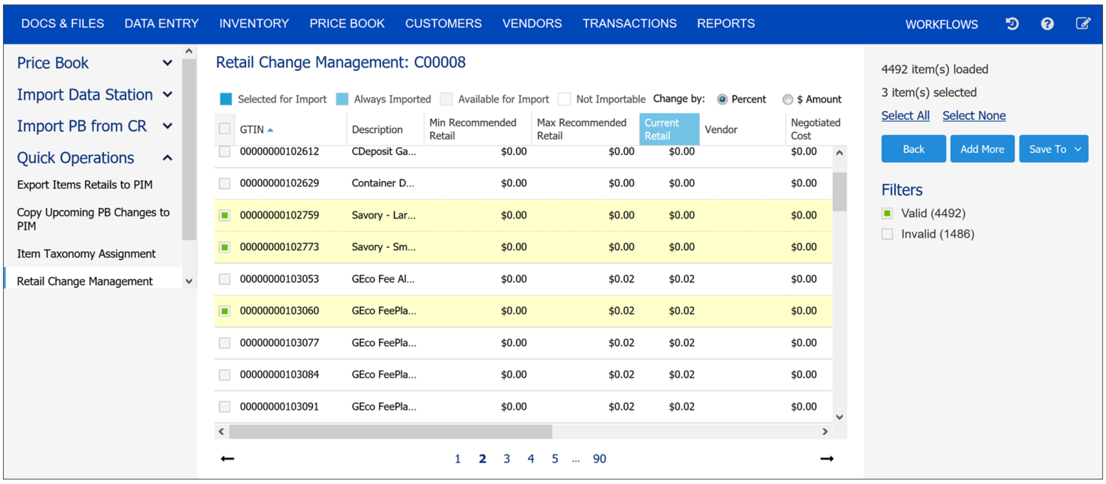
3. In the right pane of the module, click **Add More** and select the source from which you want to load items data. You can load the data from the following sources:

- **Location Price Book**: You can import data from the Price Book in the selected location. In the right pane of the module, set up the filter for items that you want to import. You can use the following filtering options:
  - In the **Items to load** field, specify how many items you want to load.
  - From the **Vendor** list, select one or more vendors from whom the items are purchased.
  - From the **Manufacturer** list, select the items manufacturers.
  - From the **Department** list, select one or more departments to which the items belong.
  - From the **Category** list, select one or more categories to which the items belong.
  - From the **Price Group** list, select one or more price groups to which the items are added.
  - From the **Promo Group** list, select one or more promo groups to which the items are added.
  - From the **Lottery** list, select an option of how lottery items must be processed. You can skip lottery items, include them or import only lottery items.
  - Select the **Active Data** check box to import only active items.
  - Select the **Is Not for Sale** check box to import items that are not for sale.
  - In the **UPC** field, specify the item UPC.
  - In the **Size** field, specify the item size.
  - In the **Name** field, specify the item name.
- **From file**: You can import items from a file in the CSV or XLS format. Click **Browse** and select the necessary file.

4. At the top of the right pane, click **Load Data Source**.



Result: The items data is loaded in the draft of the Import Tool.



5. Once the items data is loaded, you can perform the following activities:

   - Analyze the GPM for items
   - Set new current retail prices for items

Analyzing the GPM for Items

To analyze the items GPM, you can check values in the following fields in the items list:

- **Actual GPM**: Regular GPM value. To learn how actual GPM is calculated, see Petrosoft Cloud Help > C-Store Office > Accounting > About Accounting > GPM Calculation.
- **Max GPM**: The Max GPM is calculated by the following formula:

  *Max GPM = ((Max Recommended Retail – Negotiated Cost)/Max Recommended Retail)*100%*

- **Projected GPM**: The Projected GPM is calculated by the following formula:

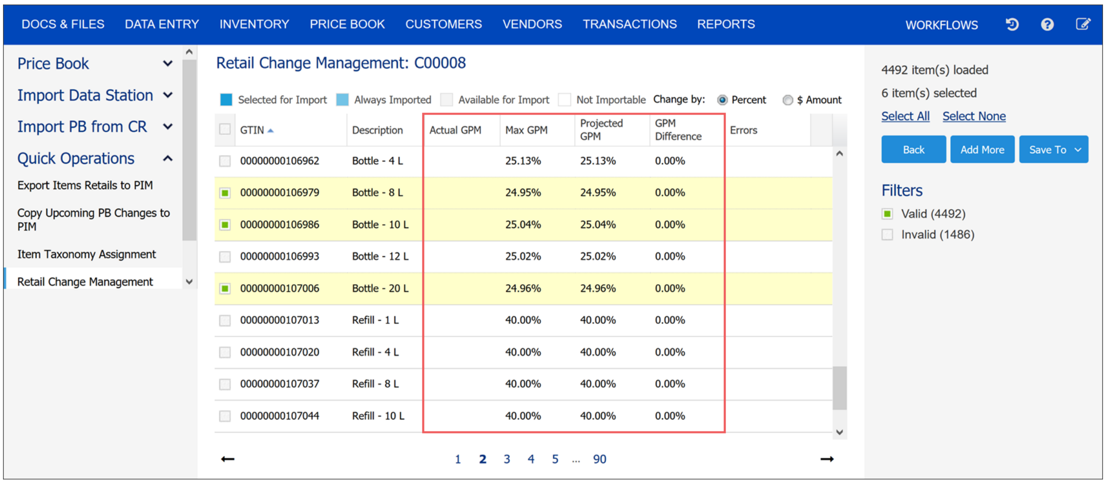
  Projected GPM = ((Current Retail – Cost)/Current Retail))*100%*

  * As the Cost value, C-Store Office uses one of the following values (starting from the highest priority):

  - Actual cost specified in the invoice
  - Promotion cost
  - Negotiated cost

- **GPM Difference**: The GPM Difference is calculated by the following formula:

  GPM Difference = Current GPM based on data existing in the database – Current GPM based on the value entered in the Import Tool draft

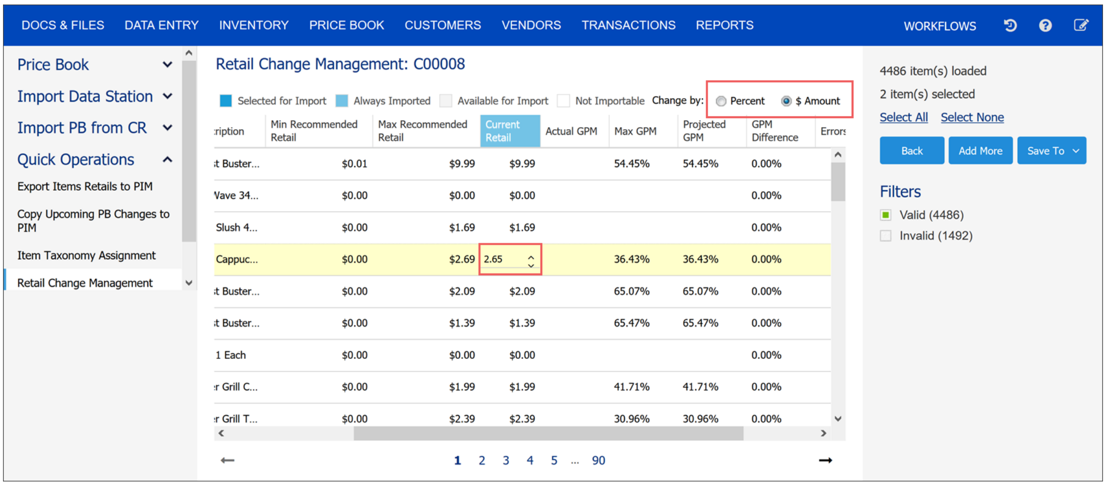


Setting New Current Retails for Items

With the **Retail Change Management** module, you can change the current retail prices for several items at once.

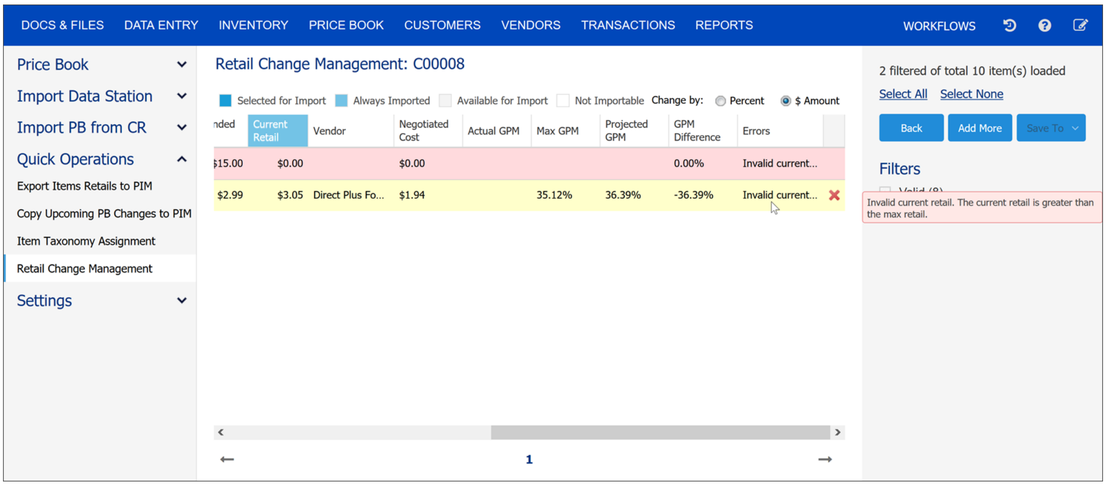
To set new current retail prices for items:

1. At the top of the items list, select the option for changing the current retail prices:
   - **Percent**: Select this option to change the current retail price by a specific percent rate.
   - **Amount**: Select this option to change the current retail price by a specific amount.
2. In the items list, select the check box next to the item whose current retail price you want to change. You can select several items at once.
3. In the **Current Retail** field, specify the percent rate or amount for changing the current retail price.

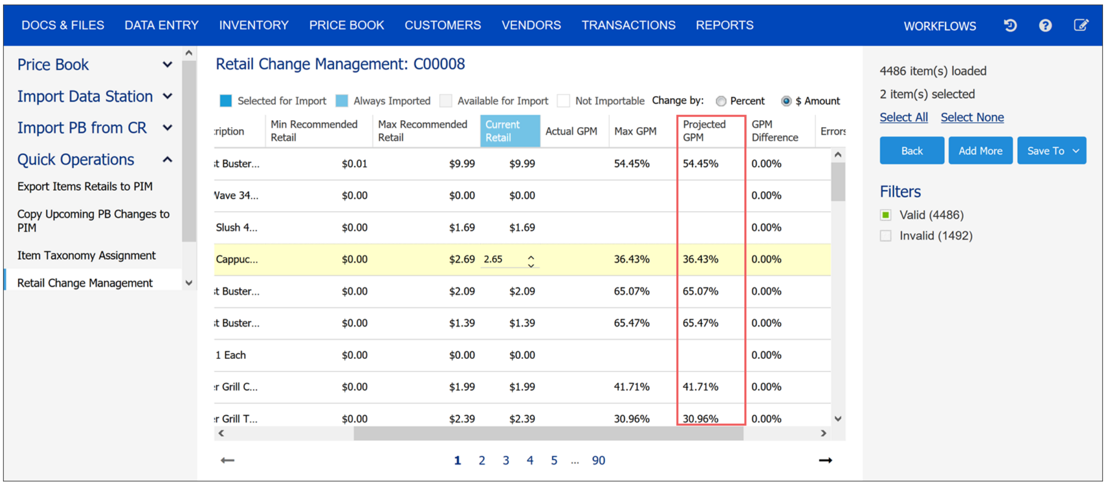


You can change the current retail price by entering the necessary projected GPM value in the **Projected GPM** field. In this case, the Import Tool will re-calculate the current retail price based on the GPM value you set up.

When you set a new current retail price for an item, the Import Tool validates if the new price is within the range set by the Min Recommended Retail and Max Recommended Retail values. If the new price falls out of this range, the Import Tool marks the item as invalid and moves it to the **Invalid** items section. Retail prices for invalid items are not exported to the destination locations.



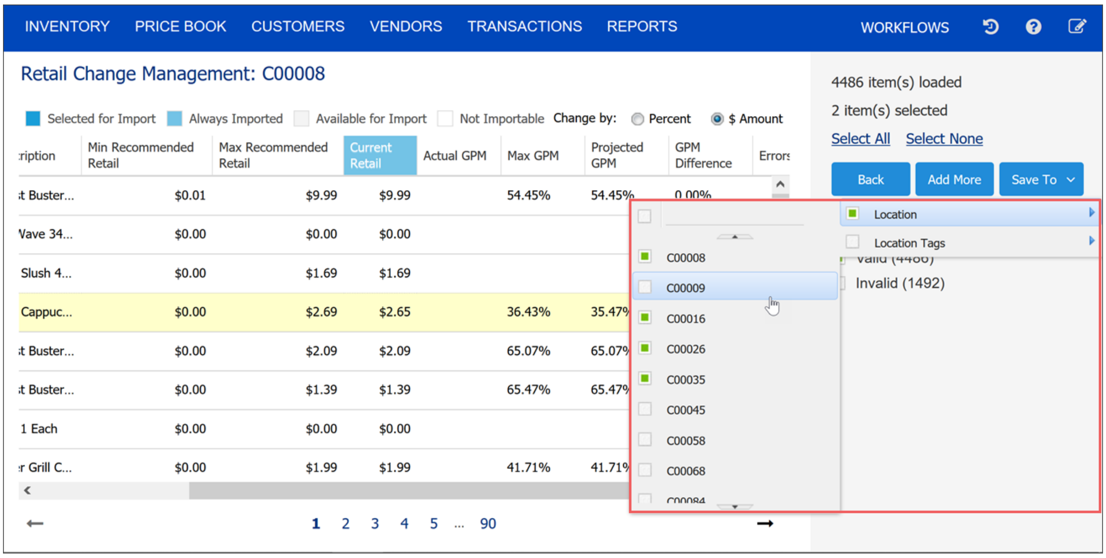
4. As soon as you set the new retail price, the Import Tool re-calculates the Projected GPM value for the item. Check the **Projected GPM** field to make sure the value is correct and meets your needs.



5. To export the changed retail prices to destination locations, in the right pane of the module, click **Save To** and select one of the following options:

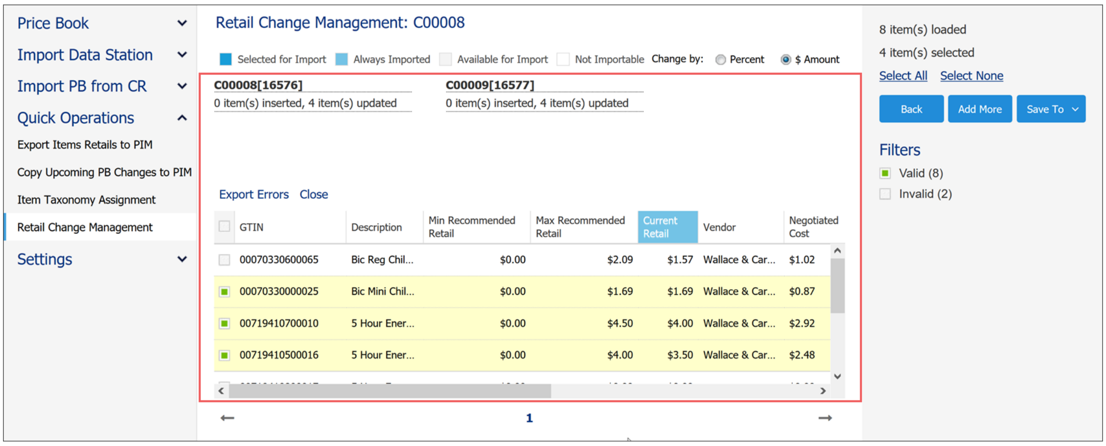
   - **Locations**: Select the check boxes next to locations where new retail prices must be exported.
   - **Location tags**: Select the check boxes next to tags assigned to locations where new retail

prices must be exported.



5. Click **Save To** once again.

Result: The Import Tool exports the changed retail prices to the selected locations and displays the export results.



During the export process, some retail prices may fail to be exported to specific locations. This can happen, in particular, if the items data does not comply with the validation rules, and you do not change the items data in the Import Tool draft to match these rules.

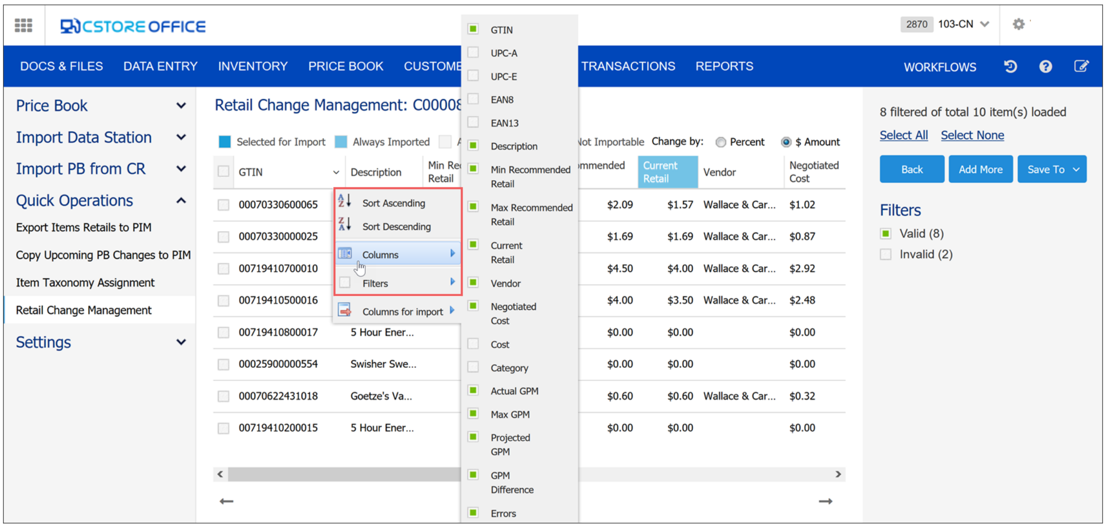
You can export information about all errors that occurred during the export process to a file. To do this, at the final step of the export process, click **Export Errors**. The Import Tool will download a file with the following information:

- Location name
- Item UPC
- Detailed error description

Sorting and Filtering Items

To facilitate work with items whose retail prices you want to analyze and change, you can sort and filter items in the **Retail Change Management** module.

- To sort items by a specific value in the ascending or descending order, click the necessary column name once or twice. Alternatively, you can click the arrow icon to the right of the necessary column and select **Sort Ascending** or **Sort Descending**.
- To filter items by a specific value, to the right of the necessary column, click the arrow icon and select the check boxes next to the values by which you want to filter the items list.



Import Item Name Translations

The **Import Item Name Translation** module of the Import Tool can be helpful for enterprise customers who have locations in different countries or regions with different local languages. If your store network is geographically distributed, you may need to maintain descriptions of items in several languages.

To facilitate the process of items setup, you can use the **Import Item Name Translation** module. This module allows you to import a list of new items together with the item descriptions and cash register descriptions presented in different languages in bulk.

At present, the Import Tool supports import of item name translations from files in the XLSX format. Once the translation data is imported to the draft, it can be saved to the following destinations:

- C-Store Office Price Book
- PIM Price Book (if your account has a PIM subscription)

Preparing a File for Importing Translations Data

To import item name translations, you need to prepare a file with the items data in the XLSX format. The file must have the following data structure.

Field Name	Mandatory (Yes/No)	Description
SKU	Yes	Item code in one of supported formats: - UPCA - UPCE - EAN8 - EAN13 - PLU
SKU Type	Yes	Code type for the SKU code in the previous column. Must be one of following numbers: - UPCA = 0 - UPCE = 1 - EAN8 = 2 - EAN13 = 3 - PLU = 4
Description	No Yes, if CR Description is not available	Item name as it appears in the C-Store Office Price Book. Must be no longer than 250 characters. The field is required if the CR Description value is not provided for the item.
CR Description	No Yes, if Description is not avail-able	Item name that will appear on the cash register and in cus-tomer receipts. Must be no longer than 20 characters. Longer values will be cropped. The field is required if the Description value is not provided.
Language	Yes	Language code to define the language for which the Description/CR Description is provided. Possible values: - ar - Arabic (العربية) - de - German (Deutsch) - en - English (English) - es - Spanish (Español) - fr - French (Français) - id - Indonesian (Bahasa Indonesia) - it - Italian (Italiano) - ms - Malay (Bahasa Melayu) - no - Norwegian (Norsk) - pl - Polish (Polski) - pt - Portuguese (Português)

Field Name	Mandatory (Yes/No)	Description
		- ru - Russian (Русский) - th - Thai (ไทย) - tr - Turkish (Türkçe) If the specified language matches the system language (set up as the display language in C-Store Office), the provided Description and/or CR Description will be appropriately updated and displayed in the item form in C-Store Office. If this field is left empty, the system will apply the value according to the system language.

If you need to import the item name translations in different languages at once, you can add several lines for the same item, each with a different language code and the Description and/or CR Description translations in this language. For example, you need to import data for the following item:

- SKU: 12657
- SKU Type: UPCA
- Item name: Strawberry donut
- Languages: English, French and Spanish

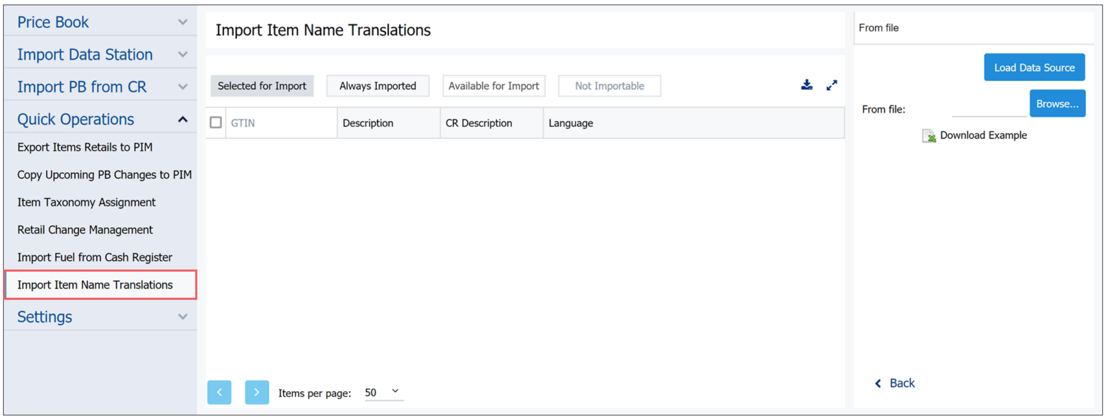
In this case, you need to prepare a file with the following structure:

SKU	SKU Type	Description	CR Description	Language
12657	0	Strawberry donut	Str. donut	en
12657	0	Beignets de fraises	Beignets de fraises	fr
12657	0	Donut de fresa	Donut de fresa	es

Importing Item Name Translations

To import item name translations:

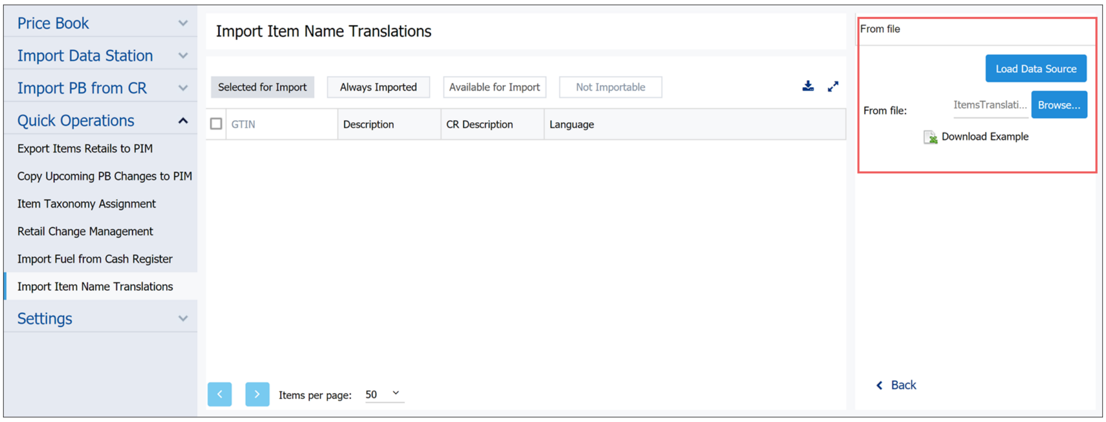
1. In the Import Tool, go to **Price Book** > **Import Tool**.
2. In the **Quick Operations** section, select **Import Item Name Translations**.



3. In the right pane, click **Browse** and select the file with the items data.

> To download a sample file that you can populate with items data, in the right pane of the **Import Item Name Translations** section, click **Download Example**.

4. In the right pane, click **Load Data Source**.

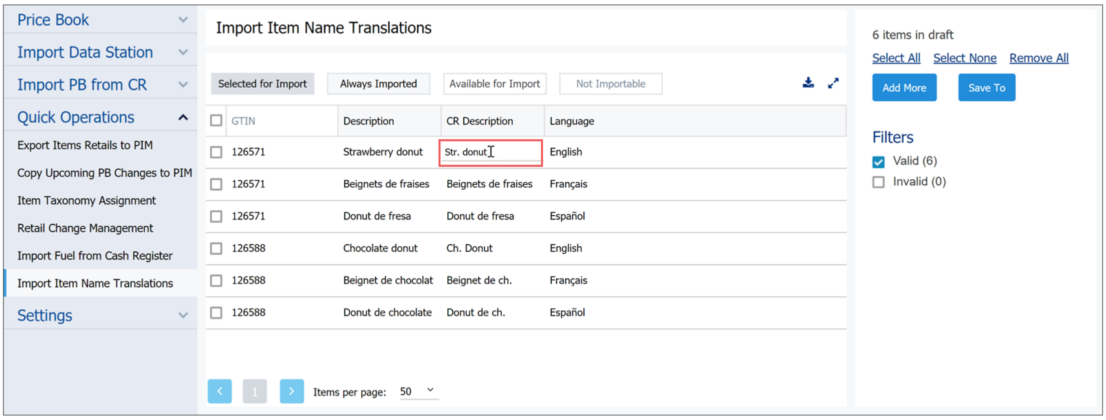


Result: The items data from the file is loaded in the Import Tool draft.

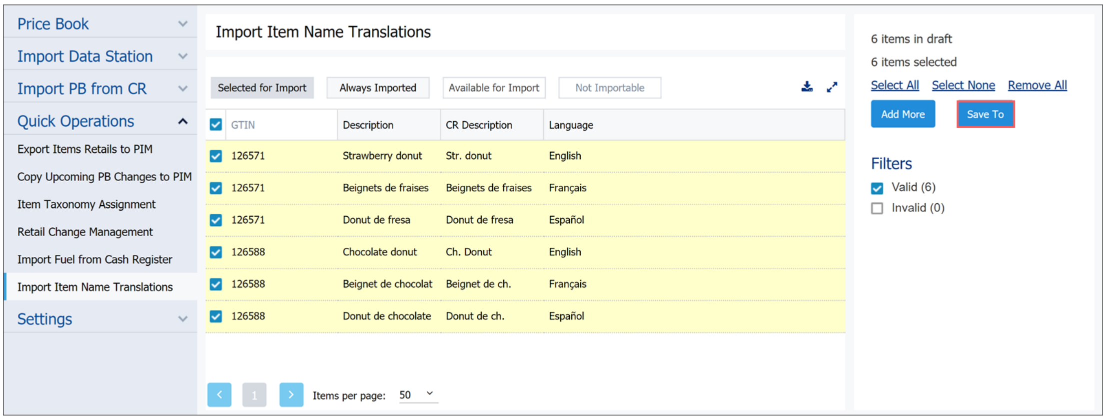
When the Import Tool loads data from the file, it validates if data for the items is specified correctly and filters items as valid or invalid. Invalid items data is not imported to the system. For more details about data validation, see Validating Objects Data.

5. In the items list, review the imported data and correct it, if needed. You can do the following:
   - To change the language for the item descriptions, in the item row, click the **Language** field and select the necessary language from the list.
   - To change the item description, in the item row, click the **Description** or **CR Description** field

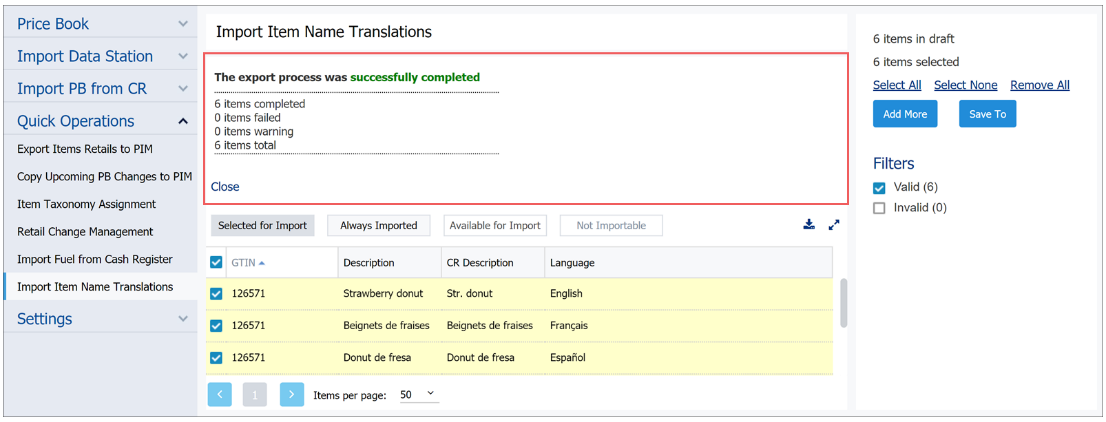
and correct the translation as needed.



6. In the items list, select check boxes next to items whose data you want to import and in the right pane, click **Save To**.



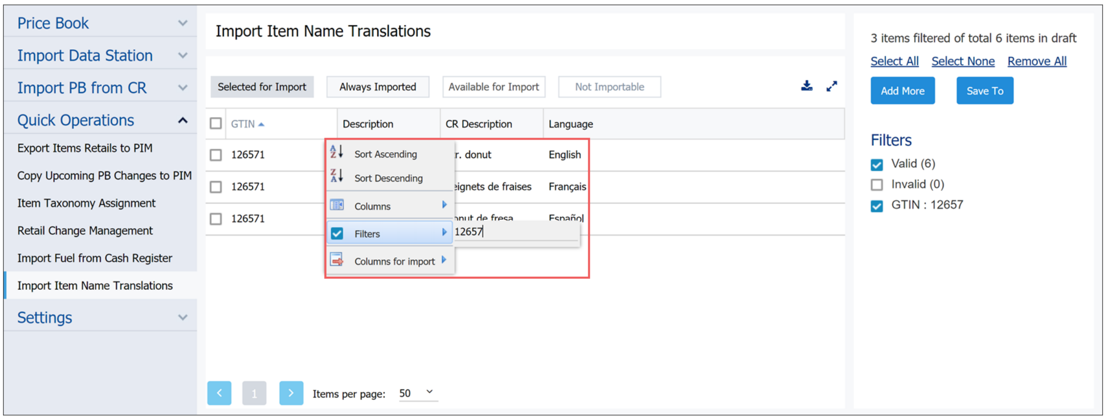
Result: The items data with name translations is saved to the C-Store Office Price Book and PIM Price Book. C-Store Office displays the data import results so that you can review them.



Sorting and Filtering Items

To facilitate work with items, you can sort and filter items in the items list.

- To sort items by a specific value in the ascending or descending order, click the necessary column name once or twice. Alternatively, you can click the arrow icon to the right of the necessary column and select **Sort Ascending** or **Sort Descending**.
- To filter items by a specific value, to the right of the necessary column, click the arrow icon and select the check boxes next to the values by which you want to filter the items list.



Exporting Items Data to a File

When working with the Import Tool draft, you can export items data to a file. For example, you can select all items that are marked by the Import Tool as invalid and export them to a file for correction.

For more details, see Exporting Draft Data to a File.

Viewing History Log

History log provides information on the import actions performed with drafts and export actions performed with stations (locations) or accounts for the selected Price Book element or its draft.

You can perform the following actions with the history log:

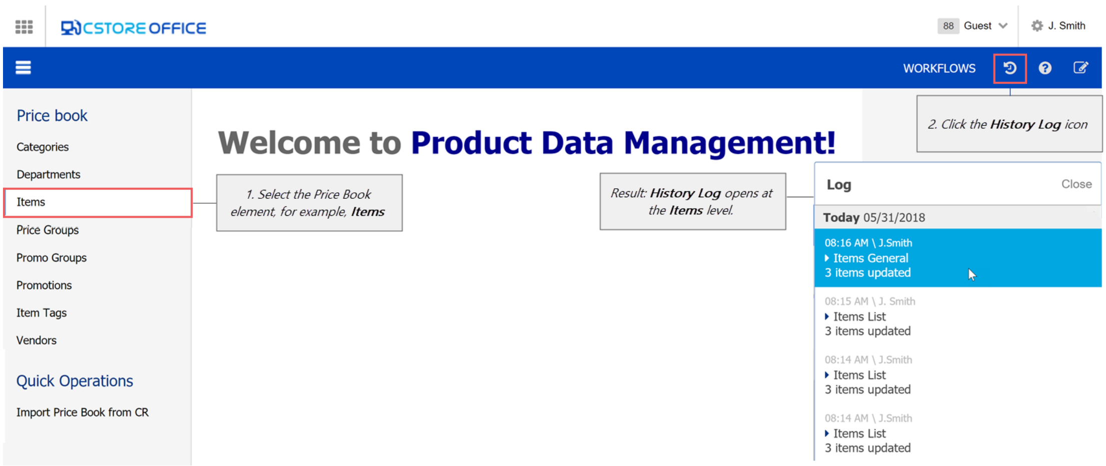
- Opening History Log
- Viewing History Log
- Reverting History Log Actions

Opening History Log

You can open the History log at the following two levels:

AT THE PRICE BOOK ELEMENT LEVEL:

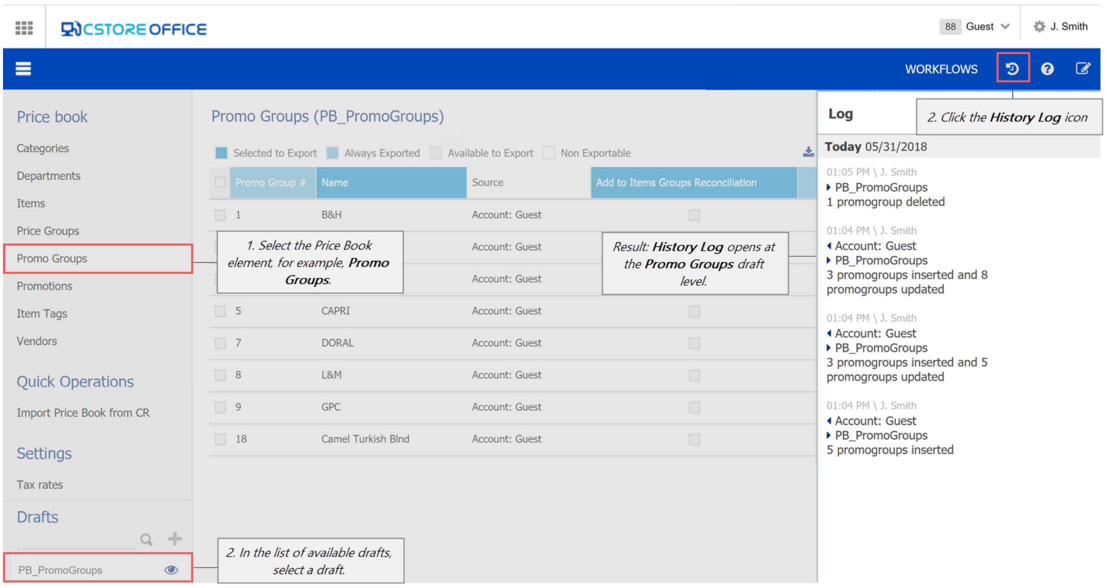
1. Go to the **Operational Menu**.
2. Select the Price Book element you need.
3. On the right of the main menu, click the **History Log** icon.



AT THE DRAFT LEVEL:

1. Go to the **Operational Menu**.
2. Select the Price Book element you need.
3. Go to the **Drafts** section.
4. In the list of available drafts, select a draft.

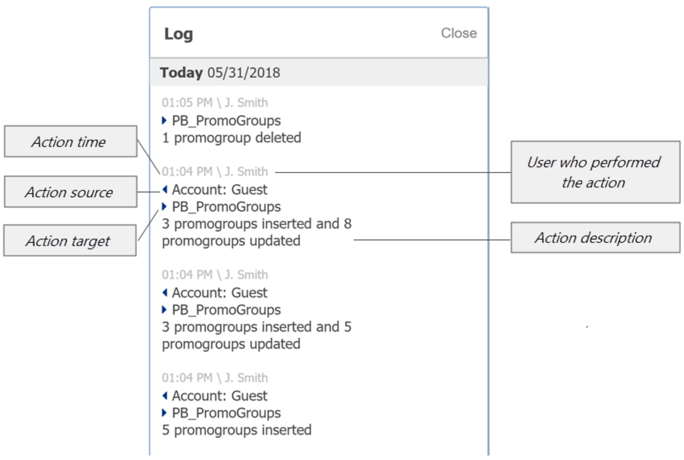
5. On the right of the main menu, click the **History Log** icon.



Viewing History Log

For each action in the history log, you can view the following data:

- **Action time** - the time when the action was performed.
- (Optional) **Action source** - a draft or data source, from which the items were imported.
- **Action target** - a draft, account, or station (location) where the changes were made: new items were imported, created, deleted, or updated.
- **User name** - name of the user who performed this action.
- **Action description** - short description of the changes made.
- The **Close** button - closes the History log.



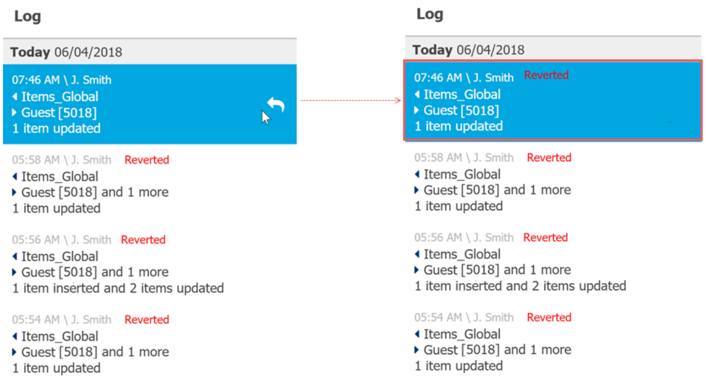
- The **Revert** icon - cancels the selected action. For more details, see Reverting History Log Actions.

Reverting History Log Actions

You can cancel or revert the last action performed at the Price Book element.

The revert option works only for changes that have been exported to a location. You cannot use the revert option for changes made at the draft level.

To revert the action, in the History log, hover over this action and then click the **Revert** icon.



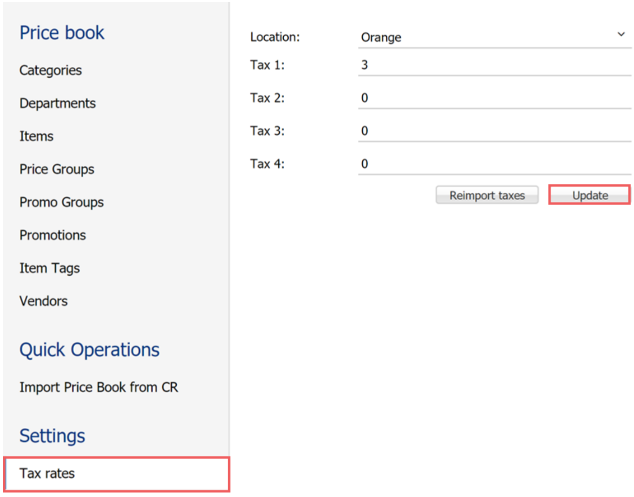
The status of the reverted action is displayed in red color to the right of this action.

In case you need to revert the previous action, revert the last action first.

Setting Up Taxes for Locations

To configure or change the taxes for a station (location):

1. Go to **Operational Menu** > **Settings** and then click **Tax rates**.
2. In the **Location** list, select the station, for which you want to configure the taxes.
3. In the **Tax 1**, **Tax 2**, **Tax 3**, and **Tax 4** fields, enter the taxes values for the selected station.
4. Press the **Update** button.



(For the system users only) In case you need to import the entered taxes to the QwickServe tax settings, click **Reimport Taxes**.

Working with Drafts

You can perform the following operations with the drafts:

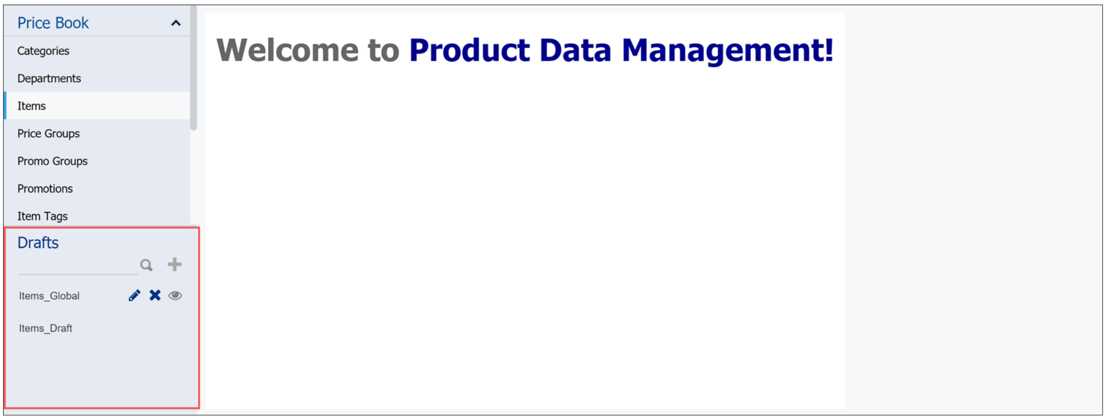
- Working with Drafts List
- Using Draft in Working Area

Working with the Drafts List

Each Price Book element has its own drafts list at the **Operational Menu** > below the **Settings** section.

To open the drafts list for the specific Price Book element, follow the steps:

1. Go to **Operational Menu** > **Price Book**.
2. Select the section you need.
3. Wait until the drafts list is uploaded in the **DRAFTS** section.
   In the example below you can see the drafts list for the Price Book Items.



You can perform the following operations with the drafts for the selected Price Book section:

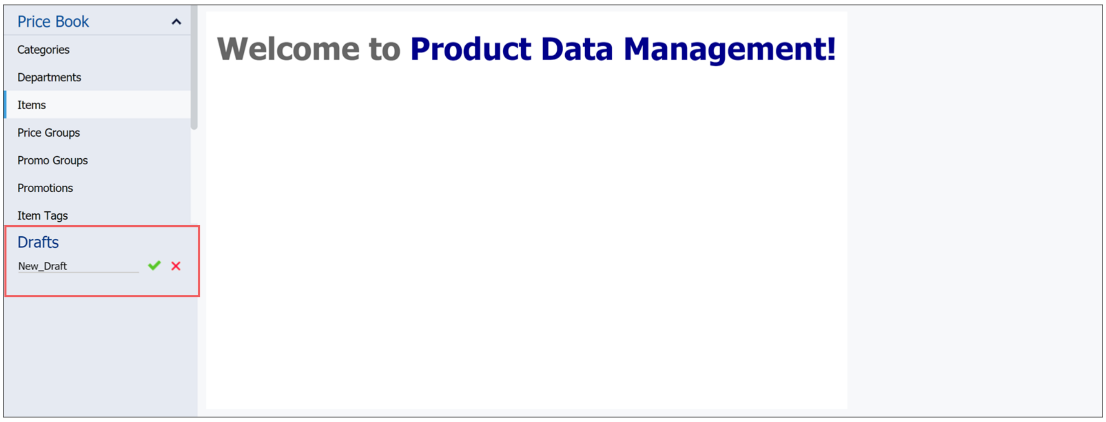
- Create a draft
- Search for a draft
- Edit the draft name
- Delete a draft

Creating a Draft

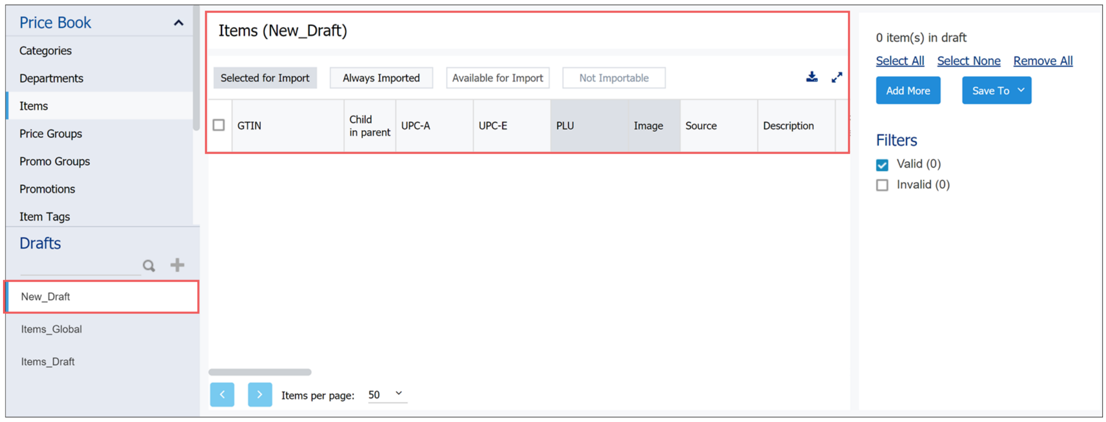
To create a new draft, follow the steps:

1. Go to **Operational Menu** > **Price book** and then select the Price book tool for which you want to create a draft.
2. Go to **DRAFTS** and then on the right of the search field, click the plus button.

3. Enter the new draft name and then click the check button.



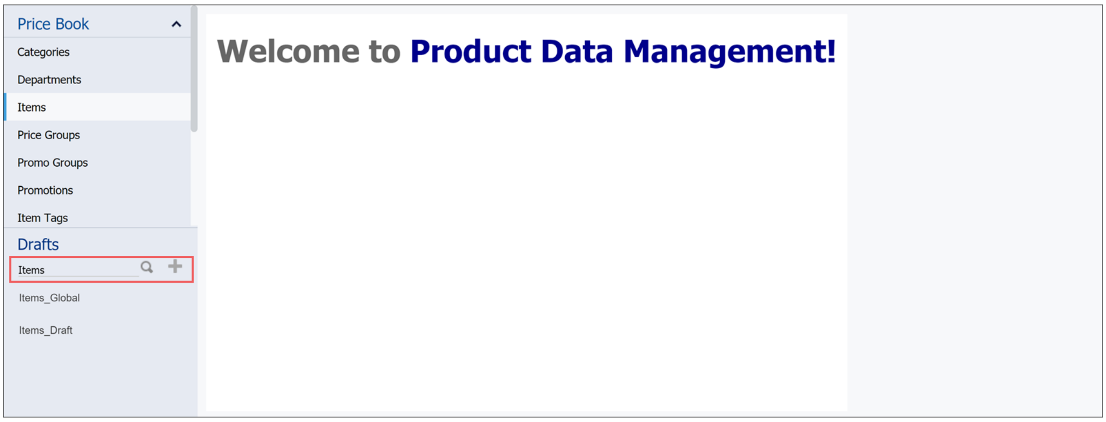
4. Wait until the draft is created and appeared in the **Working Area**.



Searching for a Draft

To search for a draft for the selected Price Book tool, follow the steps:

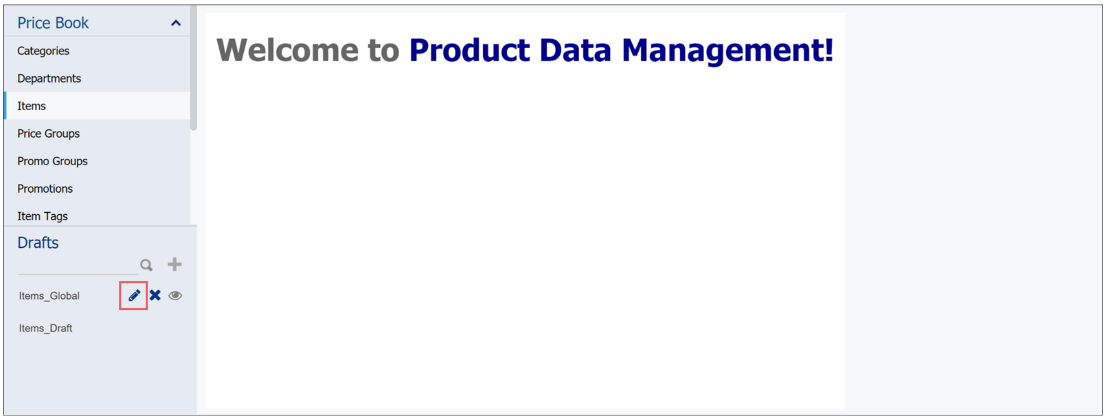
1. Go to **Operational Menu** > **Price book** > select the Price book tool.
2. Go to **DRAFTS** and then in the **Search** field, start typing the draft's name.
   The drafts list is displayed only the drafts with the entered symbols.



Editing the Draft Name

To edit the draft's name, follow the steps:

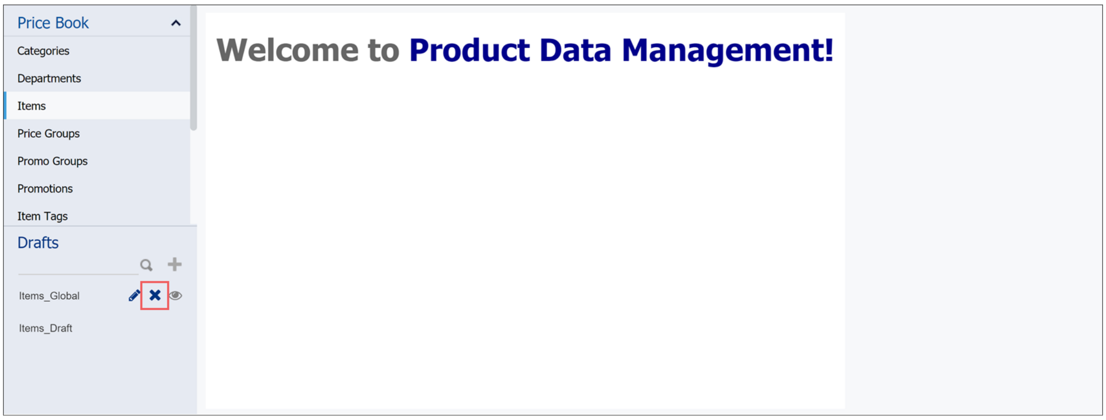
1. Go to **Operational Menu** > **Price book** > select the Price book tool.
2. Go to **DRAFTS**, click the draft and then click the edit icon.
3. Change the draft's name and then click any empty space at the Operational Menu to save a new name.



Deleting a Draft

To delete a draft from the drafts list, follow the steps:

1. Go to **Operational Menu** > **Price book** > select the Price book tool.
2. Go to **DRAFTS**, click the draft and then click the cross icon.



Using the Draft in the Working Area

You can perform the following actions with a draft in the Working Area:

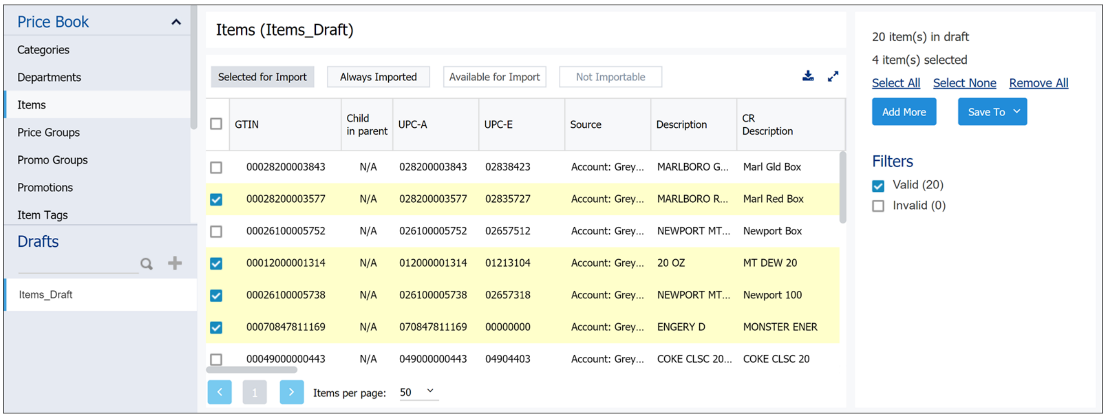
- Edit the draft manually
- Import data to the draft
- Export draft data

Editing the Draft Manually

You can edit a draft manually in the Working Area in the following cases:

- A new draft is created.
- The saved (preconfigured) draft is selected.

The newly created or selected draft appears in the Working Area as a table.



The columns in the table are marked with different colors depending on the data import conditions set for these columns. The Import Tool uses the following conditions for data import:

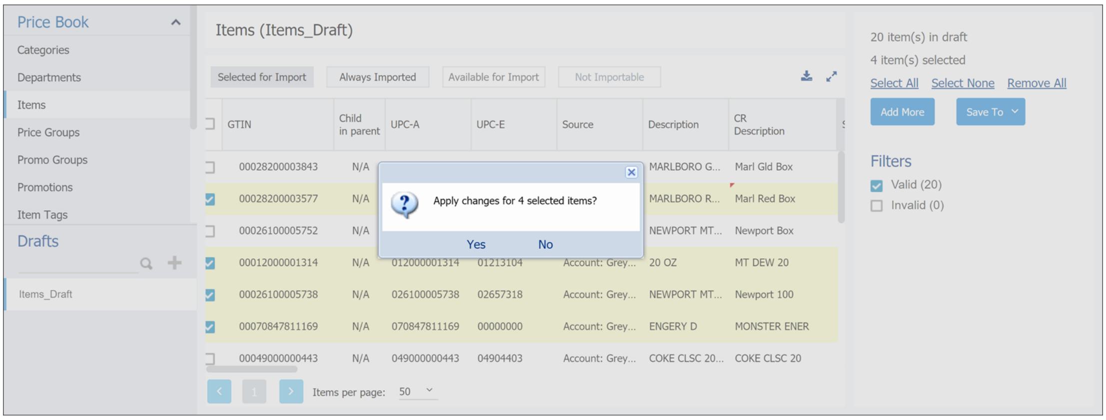
- **Always Imported**: Columns imported always by default.
- **Selected for Import**: Columns selected for data import.
- **Available for Import**: Columns available for data import.
- **Not Importable**: Columns whose data is not imported.

You can perform the following operations with the draft table:

EDITING DATA IN THE DRAFT

1. In the draft's table, select one or several data rows.
2. In any column you need, change one of the selected rows and then click any other place in the table.

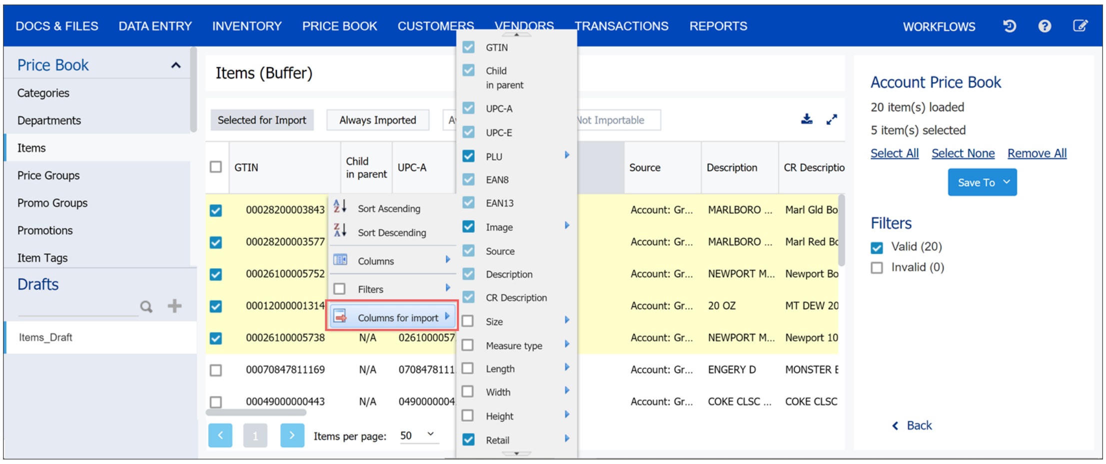
3. In the confirmation window, click **Yes**.



SETTING UP EXPORTING COLUMNS AND CONDITIONS

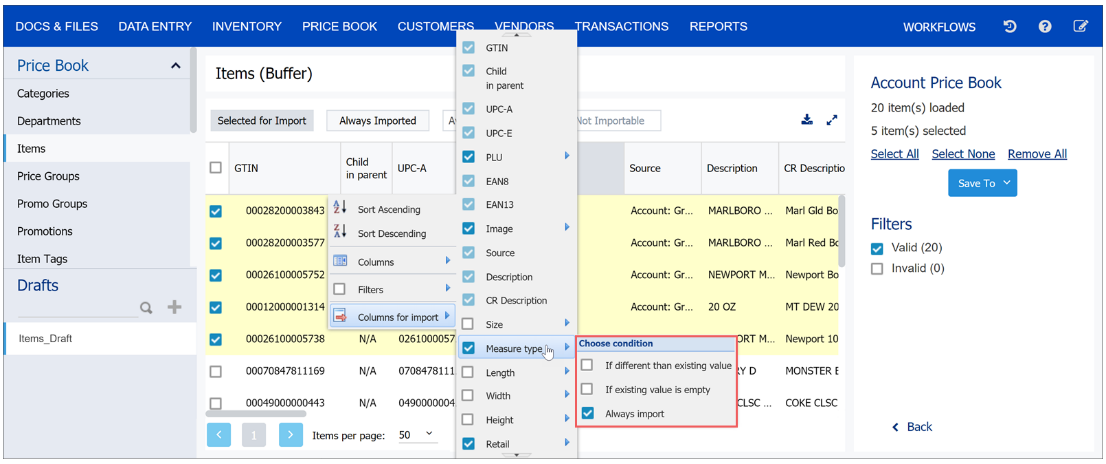
By default, the Import Tool exports only data from the columns that are marked with the *Selected for Import* and *Always Imported* conditions. If necessary, you can select the columns from which data must be exported.

1. To the right of any column, click the drop-down arrow.
2. Hover the cursor over the **Columns for import** menu and then select or clear check boxes next to the columns from which you want to export data. You can select or deselect all columns at once by clicking the **Select All** or **Select None** buttons at the top of the menu.



3. For each selected column, select one of the following exporting conditions:
   - **If greater than existing value** (for the Retail column only)
   - **If lower than existing value** (for the Retail column only)
   - **If different than existing value**: Select this option, if the column data must be exported only if values in the draft are different from values set up in the system.

- **If existing value is empty**: Select this option, if the column data must be exported only if values are not set up in the system at all.
- **Always import**: Select this option, if the column data must be exported in any case, no matter which values are set up in the system.

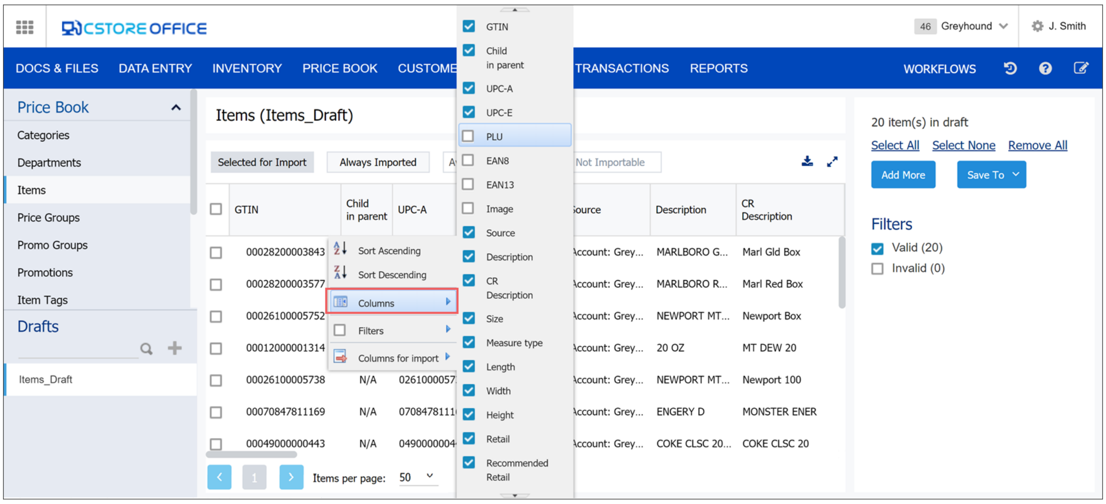


Mind the following:

- Some columns are mandatory and are always exported: **GTIN**, **UPCA**, **UPCE**, **EAN8**, **EAN13**, **Child in parent**, **Description**, **CR Description**. Mandatory columns are marked with the light green filter icon in the **Columns for import** menu.
  You cannot specify exporting conditions for mandatory columns except **Description** and **CR Description** columns.
- Some columns are linked with each other. For example, if you select the **Age Restriction** column for departments, the **Check H.ID** column will be automatically selected as well.

ADDING OR HIDING COLUMNS FOR DISPLAYING

1. To the right of any column, click the drop down arrow.
2. Hover the cursor over the **Columns** menu and then select or clear check boxes next to columns you want to show or hide in the draft's table.



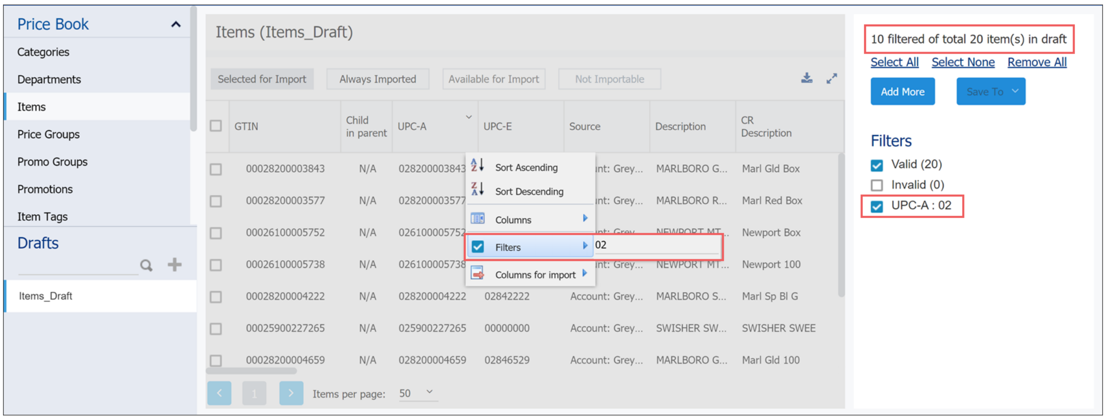
FILTERING DATA

To display elements that match a specific criterion, you can apply a simple filter or a range filter to the elements list.

In a simple filter, you define a single value by which elements must be filtered. This can be, for example, a numeric ID, some word or phrase.

To apply a simple filter:

1. Choose the column whose values you want to use as the filter conditions.
2. On the right of this column, click the drop down arrow.
3. Select the **Filter** menu and then enter the filter condition's value.

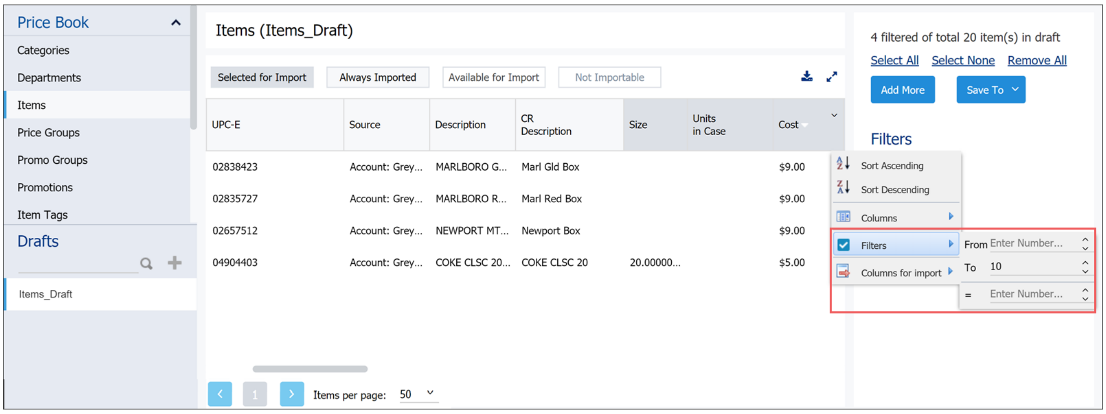


The number of filtered elements and filter conditions are displayed to the right of the data source panel.

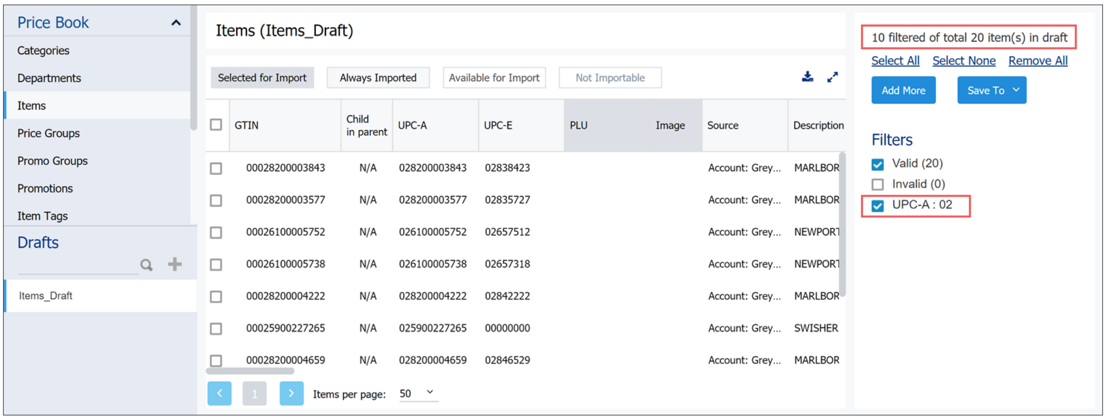
The range filter can be applied to columns that contain numeric data. In a range filter, you define the starting and end values by which elements must be filtered. This can be, for example, a price range for the **Retail** column.

To apply a range filter:

1. Choose the column whose values you want to use as the filter conditions.
2. On the right of this column, click the drop down arrow.
3. Select the **Filter** menu and then use the **From** and **To** fields to enter the range by which elements must be filtered. You can also enter either of the values, the starting or the end one. For example, to display items with the price less than $10, in the **To** field, enter 10 and leave the **From** field empty.



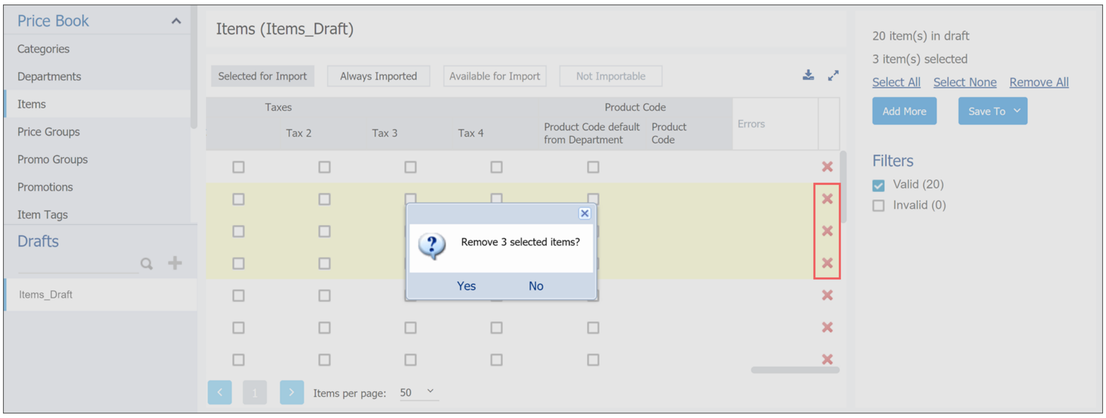
The number of filtered elements and filter conditions are displayed to the right of the data source panel. To discard the filter, clear the check box next to the necessary filter condition.



DELETING DATA FROM THE DRAFT

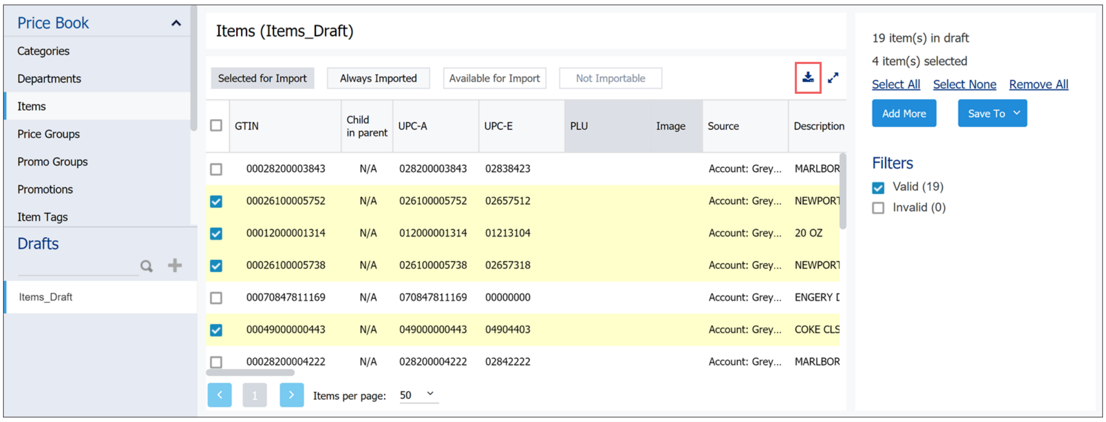
1. In the draft's table, select one or several data rows.
2. In the last table column, click the **Remove** icon.

3. In the confirmation window, click **Yes**.



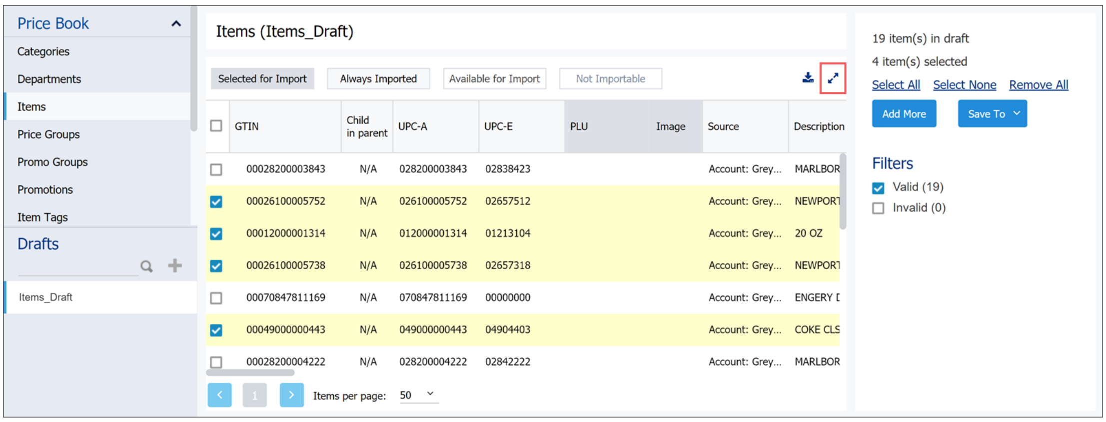
SAVING THE DRAFT TO A FILE

1. In the draft's table, select the rows you want to export.
2. At the top right of the draft's table, click the export icon.



OPENING THE DRAFT IN THE FULL SCREEN MODE

At the top right of the draft's table, click the full screen mode button.



To close the full screen mode, click the full screen mode button again.

Importing Data to Draft

To import data from other sources to a draft, you need to perform the following activities:

1. Import data to the buffer
2. Edit data in the buffer
3. Save data from the buffer to the draft

Importing Data to the Buffer

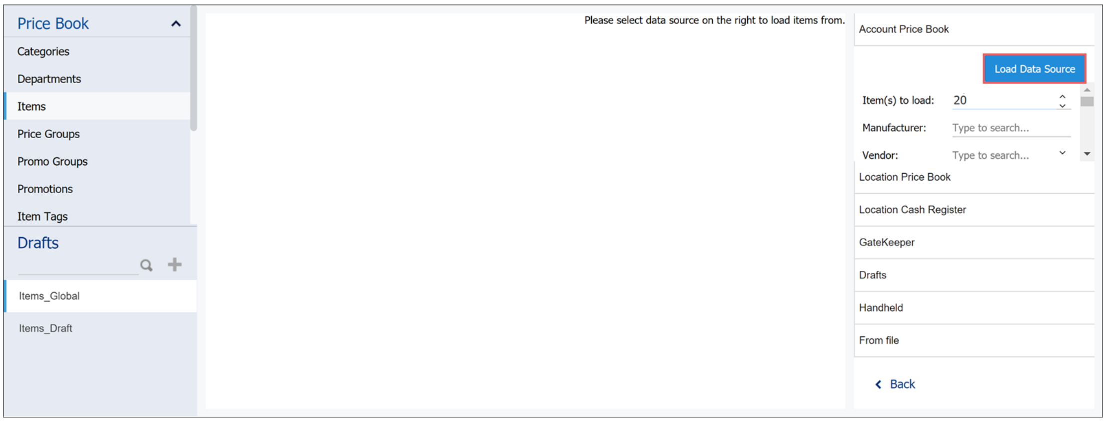
To import the data to a buffer from other sources, follow the steps:

1. Go to **Data Source panel** and then click the **Add More** button.
2. Select the type of the data source.

   The number of available data sources depends on the Price Book tool.

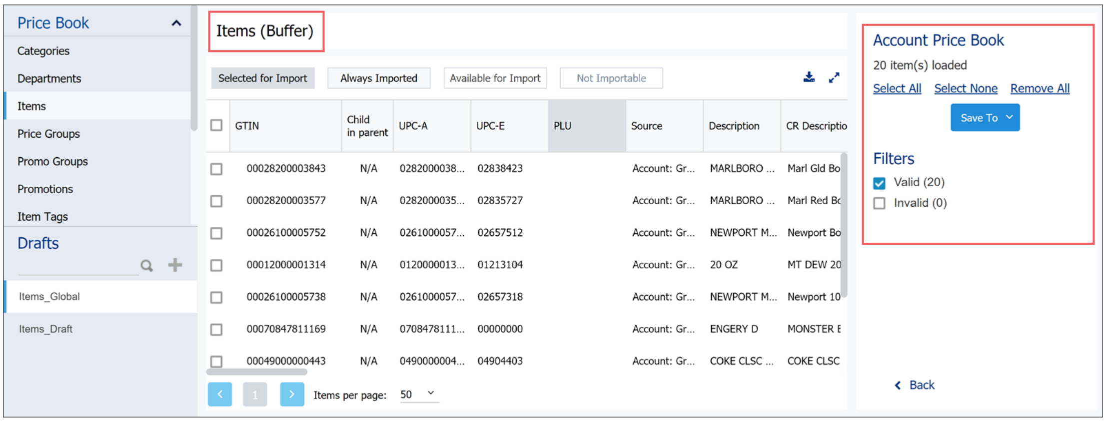
3. (Optional) Depending on the selected data source, specify the criteria for items importing.

4. Click the **Load Data Source** button.



Editing Data in the Buffer

After the data have been imported to the draft from the other data source, they are placed in the buffer table for temporary storage.



To the right of the buffer table, the following information about the imported data is displayed:

- The number of imported items
- The number of valid and invalid items in the buffer table

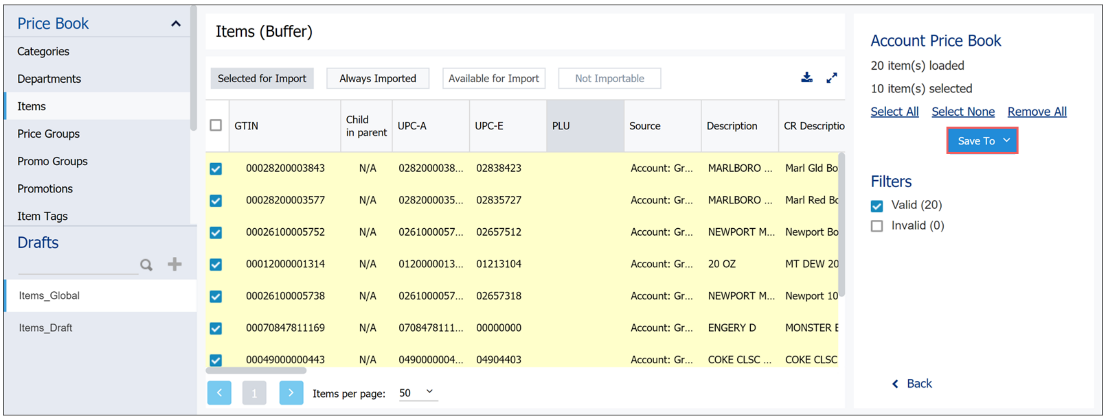
In case the imported data is not valid or not fully relevant to your search criteria, you can clear the buffer table by clicking **Remove All** on the right of the table and import the data again.

You can save the data you need from buffer to a file by selecting the rows in the buffer table and clicking the export icon on the top right of the table.

Saving Data from Buffer to Draft

To save the data from the buffer table to the draft, follow the steps:

1. In the buffer table, select the rows with the data you want to save in the draft.
2. In the **Data Sources** panel, click the **Save To** button.



3. Wait until the items are saved. By default, items are saved to the current draft.
   You can select another draft by clicking the drop down list located to the right of the **Save To** button.

Exporting Draft Data

You can export the draft data to one of the following destinations:

- File
- Location

Exporting Draft Data to a File

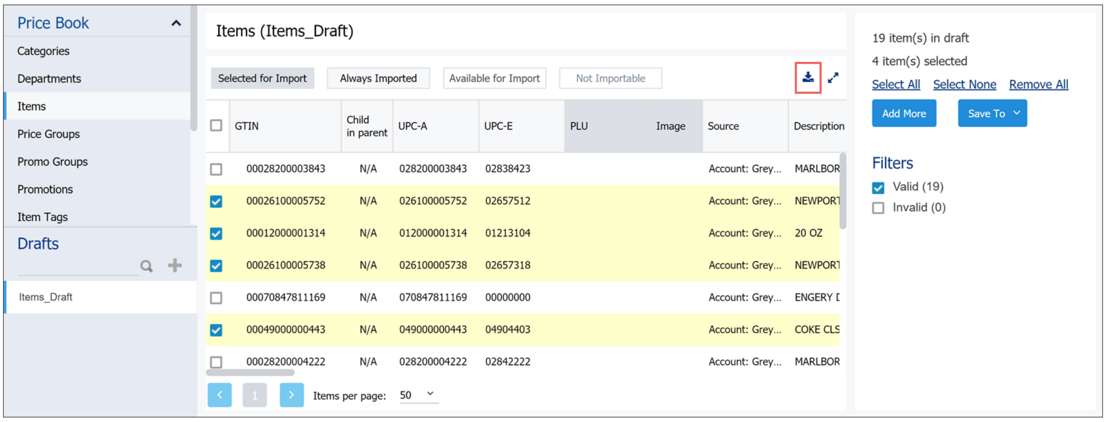
You can export data from the draft to a file in the CSV format.

> By default, the Import Tool exports only data from the columns that are marked with the *Selected for Import* and *Always Imported* conditions. If you need to export other data, select the necessary columns using the **Columns for Import** option. For details, see Setting Up Exporting Columns and Conditions.

To export the data from a draft to a file:

1. Go to **Operational Menu** > **DRAFTS** and then select the draft with the previously saved items data.
2. Make sure the draft's table contains the data you need.
3. In the draft's table, select the rows you want to export.

4. At the top right of the draft's table, click the export icon.



5. In the **Save As** window that opened, select the destination folder and then click **Save**.

Exporting Draft Data to a Location

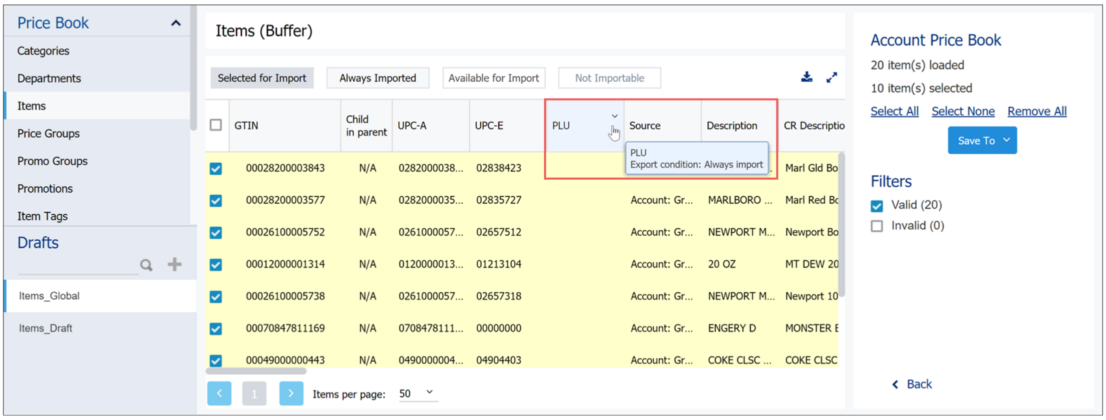
You can export the price book data from the draft to one or several locations.

> By default, the Import Tool exports only data from the columns that are marked with the *Selected for Import* and *Always Imported* conditions. If you need to export other data, select the necessary columns using the **Columns for Import** option. For details, see Setting Up Exporting Columns and Conditions.

To export the data from a draft to a location:

1. Go to **Operational Menu** > **DRAFTS** and then select the draft with the previously saved items data.
2. Make sure the draft's table contains the data you need.
3. In the draft's table, select the rows you want to export.
4. (Optional) For each exporting column, specify exporting conditions, if needed. For example, the exporting items may already exist on the location and you need to define if the new values will overwrite the current values or not.

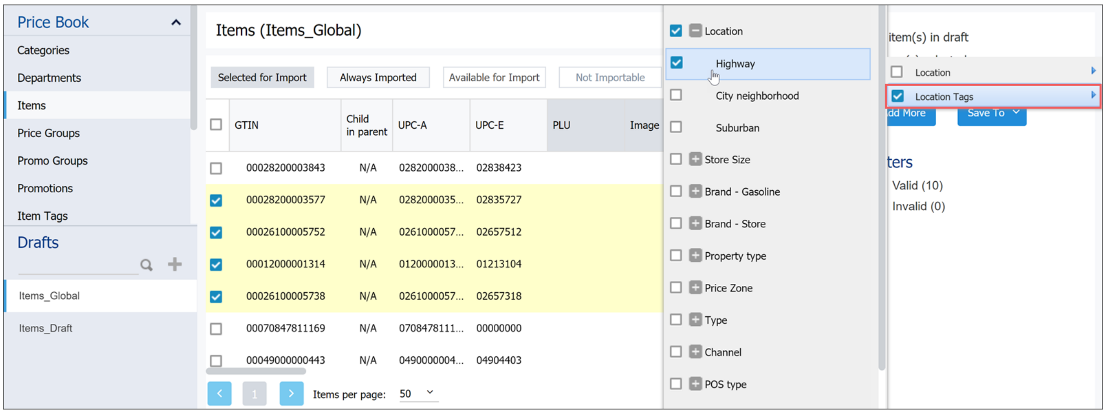
   > To view the column's current export condition, hover over the column name.



5. Go to **Data Sources panel** and then to the right of the **Save To** button, click the drop down list.
6. Depending on what price book data you are exporting, do the following:

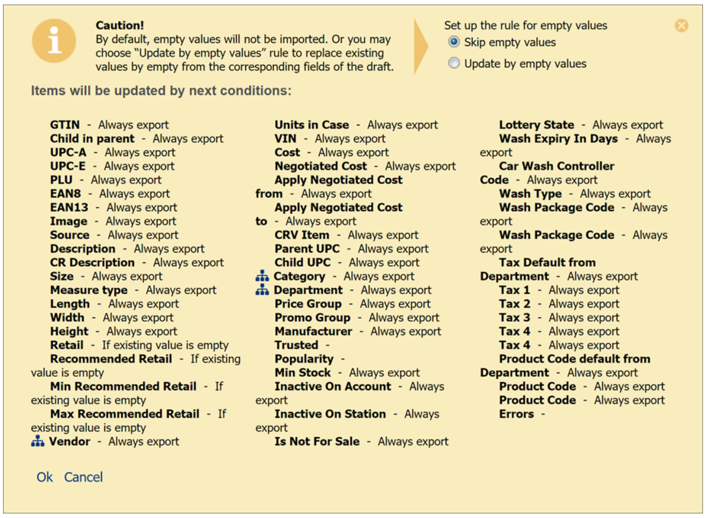
EXPORTING PRICE BOOK ITEMS

1. In the **Location** list, select one or several locations you want to export draft data to.
2. In the **Location Tags** list, select one or several location tags for the location you wan to export draft data to.
3. Click the **Save To** button.



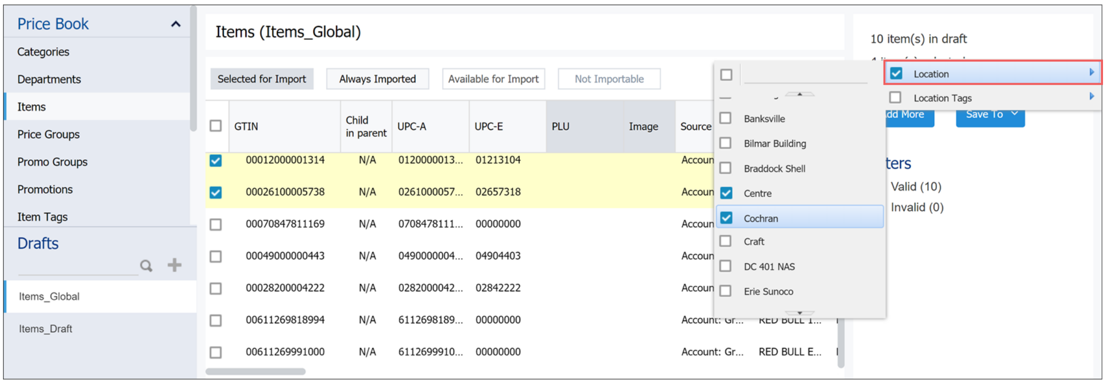
4. Make sure all exporting conditions are specified correctly.
5. Check automatic mapping results.
6. If the draft contains fields with empty values, at the top of the mapping results form, select the rule by which empty values must be exported:
   - **Skip empty values**: Select this option if you do not want to export empty values to the destination. This option is selected by default.
   - **Update by empty values**: Select this option if you want to replace existing values in the destination with empty values exported from the source.
7. (Optional) In the mapping table, adjust taxonomy settings, if needed. For more details, see Monitoring and Adjusting Taxonomy Settings.

8. Click **OK**.



EXPORTING OTHER PRICE BOOK ELEMENTS

1. Select one or several locations you want to export draft data to.
2. Click the **Save To** button.



Working with Data Sources Panel

You can perform the following actions in the Data Sources Panel:

- Import data from different sources
- Process drafts. For details, see Using Draft in Working Area.

Importing Data from Different Sources

The data can be imported to both the newly created draft and the saved (preconfigured) draft selected from the drafts list.

You can import the data to the draft from the following sources:

- Account Price Book
- Location
- Location Price Book
- Location Cash Register
- GateKeeper
- Drafts
- Handheld
- From File

Each Price Book element has its own set of data sources for importing data. For details, see the help section of each Price Book element.

Importing Data from Account Price Book

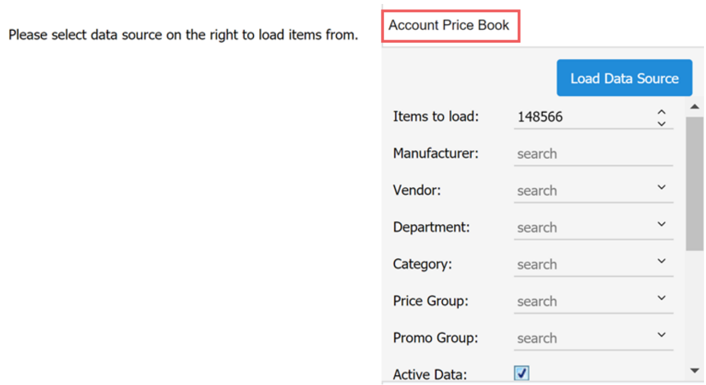
You can import all Price Book elements from the account price book to a draft.

To import Price Book elements from the Account Price Book, follow the steps:

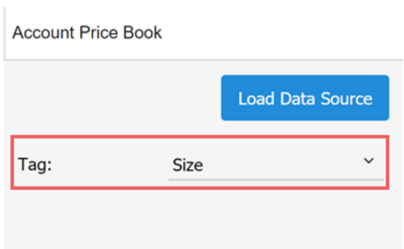
1. Create or select a draft. For details, see Working with Drafts List.
2. Go to **Data Sources Panel** and then click the **Add More** button.
3. Expand the **Account Price Book** section.
4. Depending on the imported Price Book element, specify any of the following criteria:
    - **Categories to load**, **Departments to load**, **Items to load**, **Price Groups to load**, **Promo Groups to load**, or **Promotions to load** - displays the number of the selected Price Book elements to be uploaded to the buffer

> To upload less elements, enter your number manually. In this case the most popular and frequently used elements will be uploaded.

- In case the items are imported:
  - **Manufacturer** - start typing the manufacturer's name and then select it from the list.
  - **Vendor** - start typing the vendor's name or select one or several vendors from the list.
  - **Department** - start typing the department's name or select one or several departments from the list.
  - **Category** - start typing the category's name or select one or several categories from the list.
  - **Price Group** - start typing the price group's name or select one or several price groups from the list.
  - **Promo Group** - start typing the promo group's name or select one or several promo groups from the list.
  - **Load linked items** - select this option to upload all linked items together with the selected items.
  - **Load Parent/Child** - select this option to upload all linked parent and child items together with the selected items.
  - **UPC** - enter the digits the UPCs that the imported data should include.
  - **Size** - enter the symbols that size of the imported data should include.
  - **Name** - enter the symbols that name of the imported data should include.

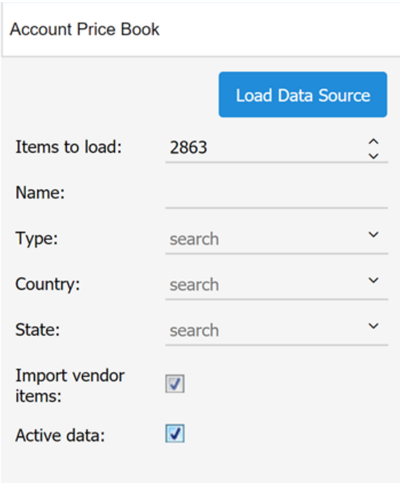


- In case the item tags are imported - in the **Tag** list, select one or several tags.



- In case the vendors are imported:
  - **Name** - enter the symbols that the name of the imported data should include.

- **Type** - select the vendor type from the list: Fuel, Expenses, Merchandise, Lottery.
- **Country** - select the vendor's country from the list.
- **State** - select the vendor's state from the list.
- **Import vendor items** - select this option to import all items of the selected vendors together with the vendors.



5. (For Items, Vendors only) Select the **Active data** option to upload the data in the 'Active' status only.
6. Click the **Load Data Source** button.

Importing Data from Location

You can import from a location to a draft the following Price Book elements:

- Price Groups
- Promotions
- Vendors

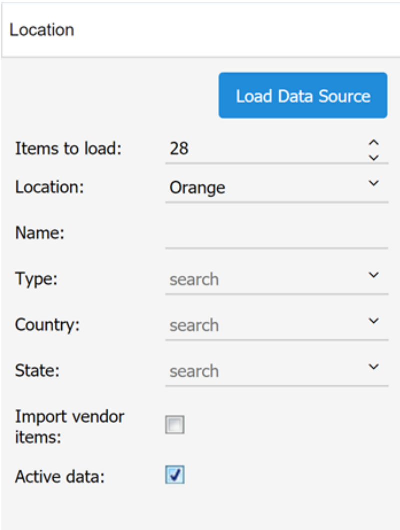
To import the above Price Book elements from the location, follow the steps:

1. Create or select a draft. For details, see Working with Drafts List.
2. Go to **Data Sources Panel** and then click the **Add More** button.
3. Expand the **Location** section, and then specify any of the following search criteria:
   - **Price Groups**, **Promotions**, or **Vendors to load** - displays the number of the selected Price Book elements to be uploaded to the buffer.

     > To upload less elements, enter your number manually. In this case the most popular and frequently used elements will be uploaded.

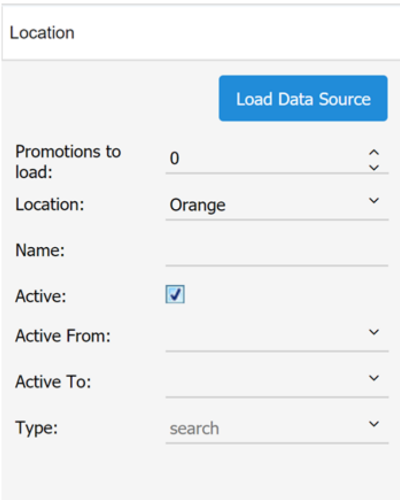
   - **Location** - select the location, from which you want to upload the data.

- In the case the vendors are imported:
  - **Name** - enter the symbols that the name of the imported data should include.
  - **Type** - select the vendor type from the list: Fuel, Expenses, Merchandise, Lottery.
  - **Country** - select the vendor's country from the list.
  - **State** - select the vendor's state from the list.
  - **Import vendor items** - select this option to import all items of the selected vendors together with the vendors.



- (For the Promotions and Vendors only) **Active data** - select this option to upload the data in the 'Active' status only.

4. Click the **Load Data Source** button.



Importing Items from Location Price Book

You can import the Price Book elements from any location of the current account.

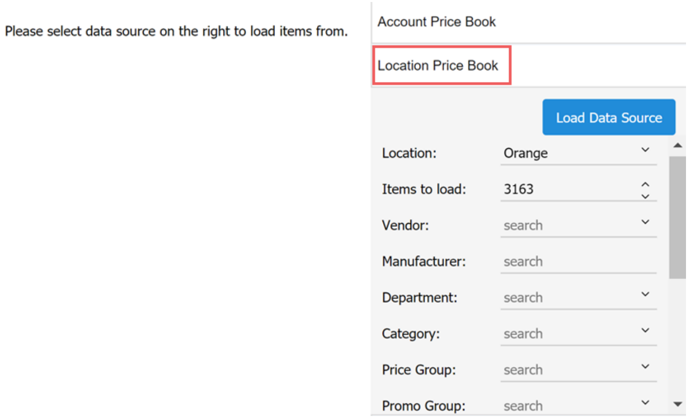
To import items from the Location Price Book, follow the steps:

1. Create or select a draft. For details, see Working with Drafts List.
2. Go to **Data Sources Panel** and then click the **Add More** button.
3. Click the **Location Price Book** section and then specify any of the following search criteria:
   - **Location**- start typing the location's name or select one or several locations from the list.
   - **Items to load** - displays the number of items to be uploaded to the buffer.

     > To upload less items, enter your number manually. In this case the most popular and frequently used items will be uploaded.

   - **Vendor** - start typing the vendor's name or select one or several vendors from the list.
   - **Manufacturer** - start typing the manufacturer's name and then select it from the list.
   - **Department** - start typing the department's name or select one or several departments from the list.
   - **Category** - start typing the category's name or select one or several categories from the list.
   - **Price Group** - start typing the price group's name or select one or several price groups from the list.
   - **Promo Group** - start typing the promo group's name or select one or several promo groups from the list.
   - **Active data** - select this option to upload the data in the 'Active' status only.
   - **Load linked items** - select this option to upload all linked items together with the selected items.
   - **Load Parent/Child** - select this option to upload all linked parent and child items together with the selected items.
   - **UPC** - enter the digits the UPCs of the imported data should include.
   - **Size** - enter the symbols the size of the imported data should include.
   - **Name** - enter the symbols the name of the imported data should include.

4. Click the **Load Data Source** button.



Importing Data from Location Cash Register

You can use the location's cash register as a data source for importing the Price Book items, departments, or promotions, when these elements are already configured on the location's cash register.

The most common case is when you've just created a station (location) and need to quickly add the items, departments, or promotions from the connected cash register.

To import data from the Location Cash Register, follow the steps:

1. Create or select a draft. For details, see Working with Drafts List.
2. Go to **Data Sources Panel** and then click the **Add More** button.
3. Expand the **Location Cash Register** section.
4. In the **Location** list, select the location.
5. Click **Browse** and then select the dump file from the cash register.
6. Click the **Load Data Source** button.

Importing Data from GateKeeper

GateKeeper represents a reference price book containing the most popular and valid C-Store Office items.

You can import the categories and items from a cash register to a draft.

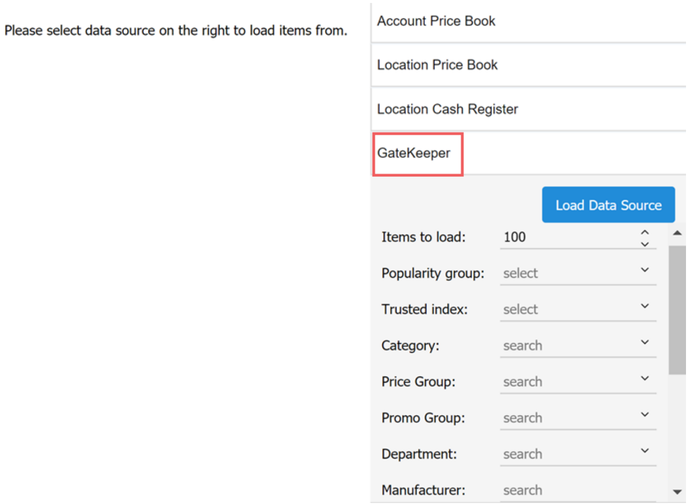
To import the categories or items from the GateKeeper, follow the steps:

1. Create or select a draft. For details, see Working with Drafts List.
2. Go to **Data Sources Panel** and then click the **Add More** button.

3. Click the **GateKeeper** section and then specify any of the following search criteria:
    - **Categories** or **Items to load** - displays the number of categories or items to be uploaded to the buffer.

> To upload less categories or items, enter your number manually. In this case the most popular and frequently used categories or items will be uploaded.

    - In case the items are uploaded:
        - **Popularity group** - select the popularity group from the list.
        - **Trusted index** - select the trusted index from the list.
        - **Category** - start typing the category's name or select one or several categories from the list.
        - **Price Group** - start typing the price group's name or select one or several price groups from the list.
        - **Promo Group** - start typing the promo group's name or select one or several promo groups from the list.
        - **Department** - start typing the department's name or select one or several departments from the list.
        - **Manufacturer** - start typing the manufacturer's name and then select it from the list.
        - **Vendor** - start typing the vendor's name and then select it from the list.
        - **UPC** - enter the digits the UPCs of the imported data should include.
        - **Size** - enter the symbols the size of the imported data should include.
        - **Name** - enter the symbols the name of the imported data should include.
        - **Load linked items** - select this option to upload all linked items together with the selected items.
4. Click the **Load Data Source** button.



Importing Data from Drafts

You can import from the existing drafts to the selected newly created or preconfigured draft all Price Book elements.

To import Price Book data from the draft, follow the steps:

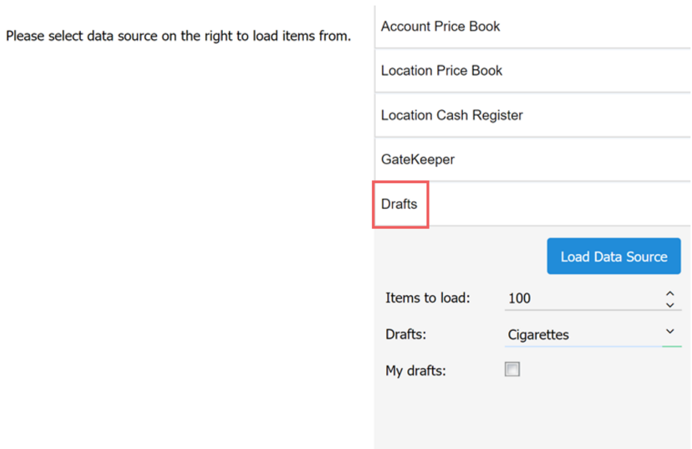
1. Create or select a draft. For details, see Working with Drafts List.
2. Go to **Data Sources Panel** and then click the **Add More** button.
3. Expand the **Drafts** section and then specify any of the following search criteria:
    - **Items to load** - displays the number of items to be uploaded to the buffer.

    > To upload less items, enter your number manually. In this case the most popular and frequently used items will be uploaded.

    - **Drafts** - select the draft saved and shared by another user.

    > You can view the drafts shared by system users only

    - **My drafts** - select this option to display your own saved drafts in the Drafts list.
4. Click the **Load Data Source** button.



Importing Data from Handheld

You can import Price Book items from the handheld files stored in CSO for each location.

To import Price Book items from the handheld file, follow the steps:

1. Create or select a draft. For details, see Working with Drafts List.
2. Go to **Data Sources Panel** and then click the **Add More** button.

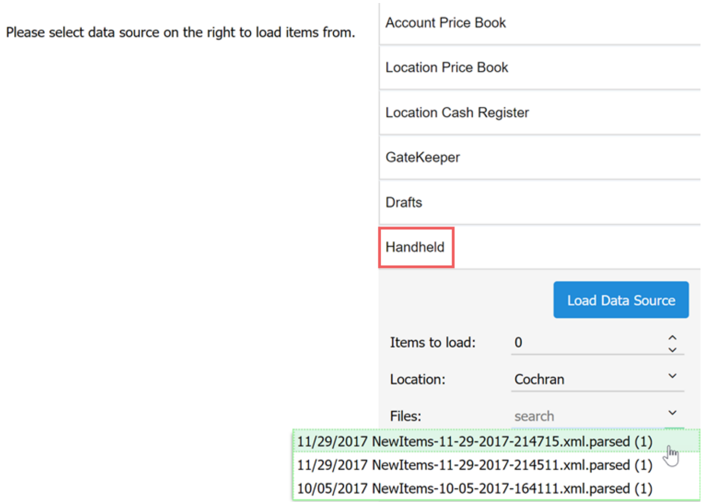
3. Expand the **Handheld** section.
   - **Items to load** - displays the number of items to be uploaded to the buffer.

   > To upload less items, enter your number manually. In this case the most popular and frequently used items will be uploaded.

   - **Location** - start typing the location's name or select a location from the list of available locations.
   - **Files** - select one or several stored files from the list of available files.

   > In case two or more files contain the same item, the item from the last created file will be imported only.

4. Click the **Load Data Source** button.



Importing Data from File

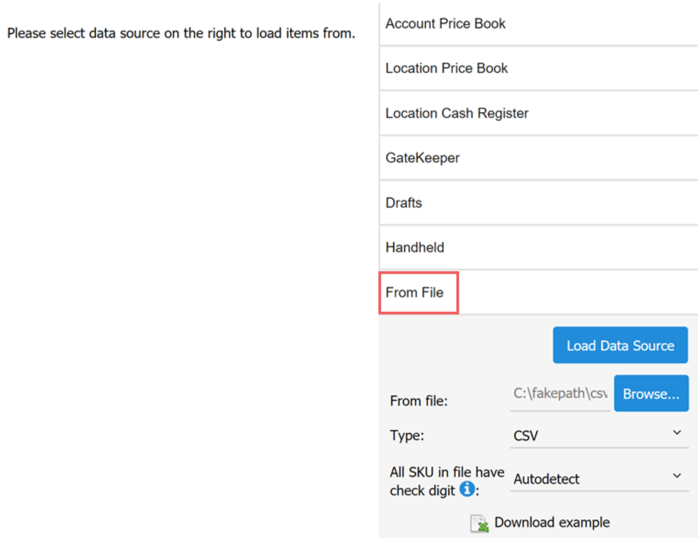
You can import all Price Book elements from the file in the CSV or XLSX format to a draft.

To import data from a file, follow the steps:

1. Create or select a draft. For details, see Working with Drafts List.
2. Go to **Data Sources Panel** and then click the **Add More** button.
3. Expand the **From File** section.
4. Make sure the file you want to import the data from has a correct data structure. To see the data structure example, click **Download example**.

For more information about Price Book items data structure, see Preparing File with Items for Importing.

5. Select the file:
   a. Click **Browse**.
   b. Select the file in the CSV or XLSX format.
   c. Double click the file or click **Open**.
6. In the **Type** field, select the file type.
7. For Price Book Items only. Specify how to process imported items depending on the check digit availability on their SKU codes. Select one of the following options:
   - **Autodetect** - default value. Leave this option selected, in case you want the system detects and validates check digits for SKU codes of the importing items.



   - **Yes** - select this option, if all SKU codes in your file have the check digit.

ITEMS PROCESSING, IF YES IS SELECTED

If **Yes** is selected, each SKU code of the importing items is checked for its compliance with the length determined by relevant SKU type in the following way:

Option #	If the length of SKU code...	Then...
1	Equals to the length of the relevant SKU type,	1) The item is marked as valid. 2) The item is imported to the draft.
2	Is not equal to the length of the relevant SKU type,	1) Zero values are added to the beginning of the SKU code to the required length. 2) The length of the SKU code is checked again: - if it equals to the length of the relevant SKU type,

		then see option 1. - if it is not equal to the length of the relevant SKU type, then the item is marked as invalid and its import to the draft is failed.

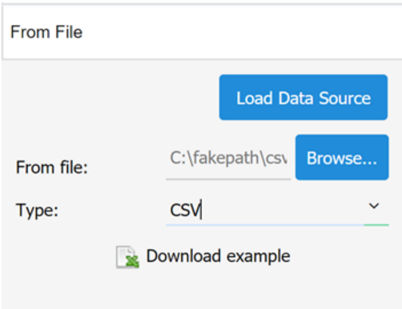
- **No** - select this option, if all SKU codes in your file have no check digit.

ITEMS PROCESSING, IF NO IS SELECTED

If **No** is selected, each SKU code of the importing items is checked for its compliance with the length determined by relevant SKU type in the following way:

If the length of SKU code…	Then…
Equals to the length of the relevant SKU type,	1) The item is marked as valid. 2) Correct check digit is counted and added to the SKU code. 3) The item is imported to the draft.
Is not equal to the length of the relevant SKU type,	1) The item is marked as invalid. 2) The item is not imported to the draft.

8. Click the **Load Data Source** button.

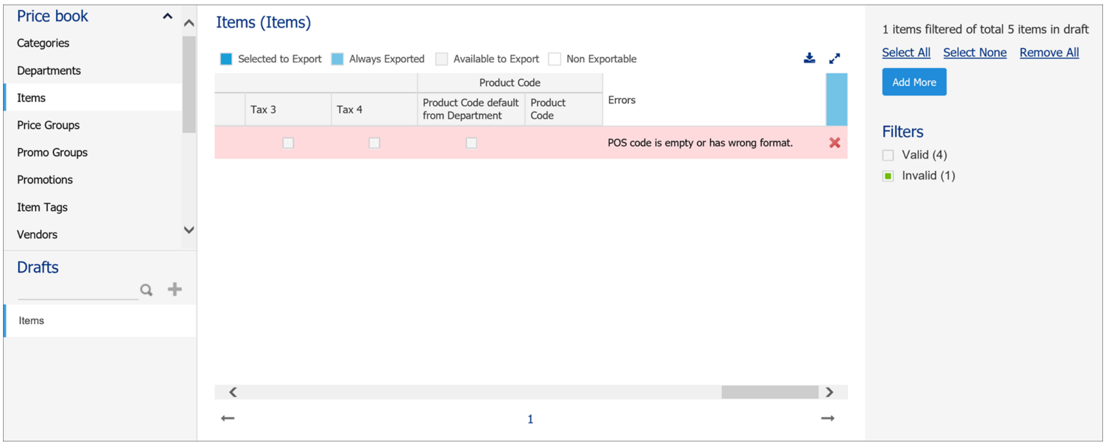


Validating Objects Data

When you import data from files to the buffer or work with the draft in the Import Tool, the Import Tool validates if the objects data is correct. The validation process helps identify the objects that are set up incorrectly or do not comply with the Price Book rules. For example, the SKU type for some item can be specified in the wrong format, the **Name** field for some category can be empty and so on.

The Import Tool groups all invalid objects and lets you review them as a single list. For each invalid object, the Import Tool provides a detailed description of the problem. You can review invalid objects, correct the problems and then save the objects to the destination location. As a result, you can be sure that only correct Price Book data is imported to the system.

The Import Tool does not export invalid objects data to destination locations.



Validation for promotions, item tags and vendors will be implemented in a future release.

To work with invalid objects in the Import Tool, you can perform the following activities:

- Review and fix invalid objects data.
- Remove invalid objects.
- Export invalid objects data to a file.

Validation Rules

In the Import Tool, objects are validated by the following rules:

CATEGORIES

The Import Tool treats a category as invalid if the following errors are encountered:

Validation Condition	Error Description
Number field is empty or its value has the wrong	Category Number is empty or has wrong format.

Validation Condition	Error Description
format.	
Number field value is not unique.	Category Number is not unique.
Name field is empty.	Category Name is empty.

DEPARTMENTS

The Import Tool treats a department as invalid if the following errors are encountered:

Validation Condition	Error Description
Number field is empty or its value has the wrong format.	Department Number is empty or has wrong format.
Number field value is not unique.	Department Number is not unique.
Name field is empty.	Department Name is empty.

ITEMS

The Import Tool treats an item as invalid if the following errors are encountered:

Validation Condition	Error Description
Name and CR Name fields are empty at the same time.	Name or CR Name is empty.
Name or CR Name field contains the “unknown” text.	Name contains “unknown” text.
POS Code is empty or its value has the wrong format: - Invalid field format (invalid symbols) - Invalid length (doesn’t correspond to the SKU type) - Invalid check-digit - Empty field value	POS code is empty or has wrong format.
POS Code value is not unique.	POS code is not unique.
SKU type has the wrong format (contains a value other than 0, 1, 2, 3, 4 or 5).	Invalid POS code type.
SKU Code is not unique.	SKU code is not unique.

PRICE GROUPS

The Import Tool treats a price group as invalid if the following errors are encountered:

Validation Condition	Error Description
Number field is empty or its value has the wrong format.	Price Group Number is empty or has wrong format.
Number field value is not unique.	Price Group Number is not unique.

PROMO GROUPS

The Import Tool treats a promo group as invalid if the following errors are encountered:

Validation Condition	Error Description
Number field is empty or its value has the wrong format.	Promo Group Number is empty or has wrong format.
Number field value is not unique.	Promo Group Number is not unique.
Name field is empty.	Promo Group Name is empty.

PROMOTIONS

The Import Tool treats a promotion as invalid if the following errors are encountered:

Validation Condition	Error Description
Type (Promotion type) is empty/has the wrong format.	Promotion Type is not provided or has wrong value format.
Name/CR Name field is empty.	Promotion Name is not provided.
Name/CR Name is not unique.	Promotion Name is not unique via the source.
Included Items field is empty.	Items are not included.
Quantity threshold is less than 1 or empty.	Quantity Threshold is not provided or less than 1.
Price Change field is empty/has the wrong format.	Price Change value is not provided or has wrong value format.
Date From field is empty/has the wrong format.	Start Date is not provided or has wrong format.
Date To is below the current date.	End Date is less than current date.

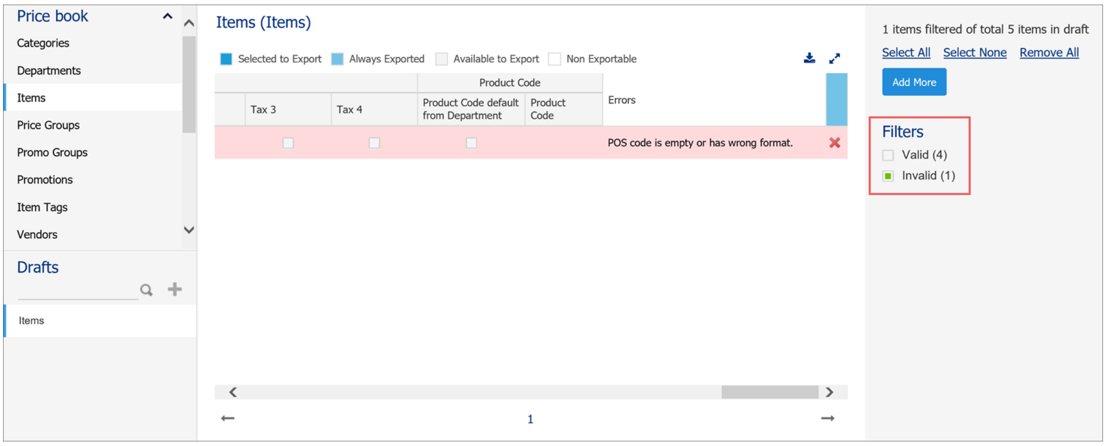
Reviewing and Fixing Invalid Data

After you add objects to the Import Tool, the Import Tool automatically launches the validation process and divides all objects into two groups:

- **Valid**: objects for which all data is set up correctly.
- **Invalid**: objects that do not comply with the Price Book rules.

To review and fix invalid data for Price Book objects, follow the steps:

1. Go to **Price Book** > **Import Tool** > **Price book** > necessary objects module.
2. Select an existing draft or create a new draft. For more details, see Working with Drafts List.
3. Add the necessary objects to the draft. For more details, see Setting Up Price Book.
4. In the filter in the right pane of the module, select the **Invalid** option.
   Result: The Import Tool displays only those objects that have some problems in their data. The invalid objects are marked red.



5. In the **Errors** column, review the problem description and fix the problem if possible.

   Result: The Import Tool automatically re-validates the objects and, if the problem is fixed, moves the objects to the list of valid objects.

   All items with the **Invalid POS Code** error are marked as **Invalid**. You cannot update the item's code manually. To upload these items to the system, you need to correct the code value in the file and upload it again.

6. Proceed with the import process in a regular manner.

Removing Invalid Objects

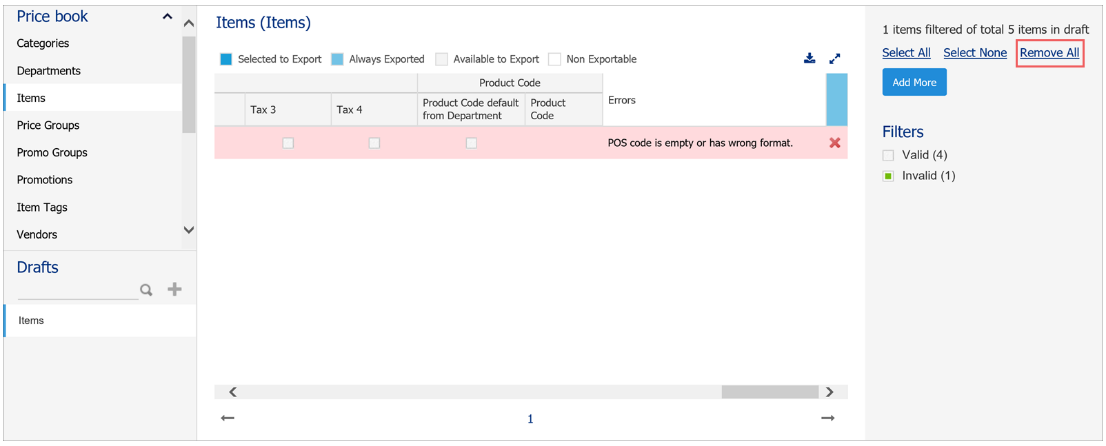
You can remove several or all invalid objects at once. To do this, follow the steps:

1. Go to **Price Book** > **Import Tool** > **Price book** > necessary objects module.
2. Select an existing draft or create a new draft. For more details, see Working with Drafts List.
3. Add the necessary objects to the draft. For more details, see Setting Up Price Book.
4. In the filter in the right pane of the module, select the **Invalid** option.

   Result: The Import Tool displays only those objects have some problems in their data.

5. In the objects list, select the check boxes next to the objects that you want to remove.

6. At the top of the right module, click the **Remove All** link.



Exporting Invalid Objects Data to a File

You can export objects data to a file. For example, you can select all invalid items and export their data to a file for further analysis.

To export objects data to a file, follow the steps:

1. Go to **Price Book** > **Import Tool** > **Price book** > necessary objects module.
2. Select an existing draft or create a new draft. For more details, see Working with Drafts List.
3. Add the necessary objects to the draft. For more details, see Setting Up Price Book.
4. In the filter in the right pane of the module, select the **Invalid** option.
   Result: The Import Tool displays only those objects have some problems in their data.
5. In the objects list, select the check boxes next to the objects whose data you want to export.
6. At the top right corner of the objects list, click the export icon.