

# Import Tool Manual

For Petrosoft Customers

Version 5

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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:
  - o Copy the item tags between accounts,
  - o 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,
  - o Manage the Price Book elements.
- Import and update the detailed information about the account's stations.
- Perform the following quick operations:
  - o Synchronize the Price Book data,
  - o Export items retails to PIM (available only for the users of the PIM module),
  - o 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.

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GENERAL	TAGS	COMPANY	👗 Admin
Employees	Companies	Classes	Profile
Roles	Divisions	Chart of Accounts	Mail ()
Locations	Location	Account Series	Tickets
Competitors		Transaction Assignment	Home Page Settings
Setup Taxation		Bank Statement Assignment	Alerts
Loyalty		Export Settings	Log out
EDI Setup			

- 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.

Allow users to rewrite the item"s department Allow users to rewrite the item"s Category Allow users to rewrite the item"s Price Group Related Components CRDepartment add/edit form Custom Income Setup Department Taxes Fuel distributor add/edit form Ilmport Items Ilmort Items Ilmort Items Price Book manager Price Book Account level Price Book Account Categories Setup Price Book Account Categories Setup Price Book ImportTool PriceBook.ImportTool PriceBook.ImportTool.Pricegosps PriceBook.Im	Allow users to rewrite the item"s department Allow users to rewrite the item"s Category Allow users to rewrite the item"s Price Group Related Components CRODepartment add/edit form Custom Income Setup Department Taxes Fuel distributor add/edit form Import lems Fuel distributor add/edit form Import lems Import lems Import lems Import lems Price Book manager Price Book Account Categories Setup PriceBook.lmportTool PriceBook.lmportTool PriceBook.lmportTool PriceBook.lmportTool PriceBook.lmportTool PriceBook.lmportTool PriceBook.lmportTool PriceBook.lmportTool PriceBook.mportTool PriceBook.mportTool PriceBook.mportTool PriceBook.mportTool PriceBook.mportTool PriceBook.mportTool Categories PriceBook.mportT	Allow users to rewrite the item's department Allow users to rewrite the item's Category	Price Book	
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		Beleventer and Table Anders	Preselock Importool State     Preselock Importool State     Preselock Importool State     Preselock Importool Price     Preselock Importool Catege	ter           irles           ments           ments
PriceBook.ImportTool.UpcomingToPIM	PriceBook ImportTool Vendors	Pricebook.import tool.vendors	Presolock.importTool.Tools.informediate     Presolock.importT	ter  ter  ter  ter  ter  ter  ter  ter



 $\Omega$ 

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.
- 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.

Employee Setup Personal Data Login & Password Tex Information		
Forms Signed Engloyment Hotary Training Data Sharing	Enable access Login Alex Interface Default interface	Vortections With Head Processing of the second sec

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:

Location:	search	~
	Aramingo	^
	Banksville	
Import File:	Bilmar Building	
	Centre	
	Cochran	
	Craft	
	Erie Sunoco	-

# **Opening Import Tool**

To open the Import Tool:

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

		OFF	ICE						
DOG	CS & FILES	DATA	ENTRY	INVENTORY	PRICE BOOK	cu	STOMERS	VENDOF	s
					Dashboard		Promo Gro	adr	
Shifts R	CASH REGISTE	R	Tasks No Today Tas	ks	CR Departments		Item Tags		
sew New		0			Items		Promotions		
Highlan	1	1	🕅 News		Category		Price Book	Wizard	
SmartP	DS 400	0	05/14/18	IMPORTANT:	NACS Categories		Import Item	s	
🎇 Bilmar E	uilding	0	04/25/18	New video	9				
Greentro Building	ee Office	0	04/25/18	New video	GPC Taxonomy		New Items	Manager	
Banksvi	le	0			Price Groups		Import Tool		
Interbor	þ	1			Frice Groups		import roor	1	

# 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.
  - o 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.
  - o 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:
  - o Importing data: populating the draft with the data from different sources.
  - o Editing draft: creating new data manually, removing data, saving data in the draft.
  - o Exporting data: saving draft's data to a file or to the location.
- Main Menu buttons:
  - o The History Log button: opens the History Log journal.
  - o 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.

Price Book 🔹 🔺 💼	Items (Buffer)	Account Price Book
Categories	Selected to Export Always Exported Available to Export Non Exportable	20 items loaded
Departments		1 items selected
Items	GTIN Description CR Description Size Measure type Length Width Height	Select All Select None Remove All
Price Groups	00028200003843 MARLBORO G MARLBORO PK Piece 0 0 0	Save To 🗡
Promo Groups	00028200003577 MARLBORO B., MARLBORO PK Piece 0 0 0	Filters
Promotions		<ul> <li>Valid (20)</li> </ul>
Item Tags	00026100005752 NEWPORT BO NEWPORT B PK Piece 0 0 0	Invalid (0)
Vendors	00012000001314 MT DEW 200Z MT DEW 200Z 20 OZ Weight 0 0 0	
Import Data Station 🐱	00026100005738 NEWPORT BO NEWPORT B PK Piece 0 0 0	
Quick Operations 🗸	00070847811169 MONSTER E MONSTER E 160Z Weight 0 0 0	Data Sources
Settings 🗸 🗸	00049000000443 COKE CLSC 2 COKE CLSC 20 20 OZ Weight 0 0 0	
Drafts	00028200004222 MARLBORO S MARLBORO PK Piece 0 0 0	
Q <b>+</b>	00611269818994 RED BULL 12OZ RED BULL 12O 12 OZ Weight 0 0 0	Working Area
Items	00611269991000 RED BULL EN RED BULL ENE 8.4 OZ Weight 0 0 0	
	00025900227265 SWISHER SW SWISHER S 2PK Volume 0 0 0	•
Operational Menu		
	← 1 -	K Back

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

- 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.

	Price book	Items (Acc_Station_	Items)					0 items in draft
	Categories	Selected to Export	Always Exported 📃 Avail	able to Export	Non Exportable		± 2	Select All Select None Remove
	Departments	GTIN	Child In parent UPCA	UPCE	PLU	Image Source	Description	Add More Save To Y
1. Click Items.	Items		in parene					
	Price Groups						Î	
	Promo Groups							
	Promotions						Selected draft	
	Item Tags							
	Vendors							
	Quick Operations							
	Import Price Book from CR							
	Settings							
2. Go to Drafts.	Tax rates							
2a. Create a new draft.	Drafts							
2b. Select the	Acc_Station_Items	< C					•	
created draft.		←					$\rightarrow$	

- 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.

0 items in draft Select All Select None Remove All	Account Price Book	b. Select Account Price Book or Location Price Book
a. Click Add More	Items to load: 100 Manufacturer: search Vendor: search Department: search Location Price Book Location Cash Register GateKeeper Drafts Handheld From File	d. Click Load Data Source c. Specify import criteria

- 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.



									Select the items you need	Save the selected items to the draft
Price book	Iten	ns (Buffer)								Location Cash Register
Categories	<b>=</b> s	elected to Export	Always Exp	orted Availabl	e to Export	Non Exportable			2. 1	96 items loaded
Departments		GTIN 🔺	Child in parent	Description	Size	Measure type	Units in Case	Cost	Category	3 Items selected Select All Select None Remove All
Items		00012000000133	N/A	PEPSI CAN	SINGLE	Piece	1	\$0.00	Soft Drinks 🗙 🔶	Save To Y
Price Groups		00012000000850	N/A	MTN DEW CAN	SINGLE	Piece	1	\$0.00	Soft Drinks 🗙	Current Draft
Promo Groups		00012000001201	N/A	DEDSI 2007	20.07	Weight	1	¢0.00	Soft Drinke	Filters
Promotions		00012000001291	N/A	PEP31 2002	20 02	weight	1	\$0.00	SOIL DIIIKS	Valid (96)
Item Tags		00012000001307	N/A	PEPSI DT 200Z	20 OZ	Weight	1	\$0.00	Soft Drinks 🗙	(·)
Vendors		00012000001345	N/A	DIET MT DEW	200Z	Weight	1	\$0.00	Soft Drinks 💥	

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:
  - o Gilbarco Passport
  - o Verifone Ruby
- Import Tool is opened. For details, see Opening Import Tool.

- 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.

1. Click Hems	Price book Categories Departments Items Price Groups Promo Groups Promotions Item Tags Vendors Quick Operations Import Price Book from CR	Items (CR_Items) Selected to Export GTTH	Always Exported Availa	UPCE	Non Exportable PLU	Image Source	Description	0 items in draft Select All Sele Add More	st None Rem Save To V	iove All
2. Go to <b>Drafts</b> . 2a. Create a new draft. 2b. Select the created draft.	Settings Tax rates Drafts CR_hems	×					,			

- 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.

	0 items in draft Select All Select None Remove All		Account Price Book	b. Select Location Cash Register
a. Click Add More.	Add More Save To 🗡		Location Cash Register	e. Click Load Data Source
		>	Location: Orange  Passport dump file:	c. Select location with a cash register
			GateKeeper Drafts	d. Click <b>Browse</b> and then select CR dump file
			Handheld	

- 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.

									Select the items you need	Save the selected items to the draft
Price book	Iten	ns (Buffer)								Location Cash Register
Categories	📕 S	elected to Export	Always Exp	orted 📃 Availabl	e to Export	Non Exportable			± 2	3 items selected
Departments		GTIN 🔺	Child in parent	Description	Size	Measure type	Units	Cost	Category	Select All Select None Remove All
Items		00012000000133	N/A	PEPSI CAN	SINGLE	Piece	1	\$0.00	Soft Drinks 🗙 🔶	
Price Groups	-									
Promo Groups		0001200000850	N/A	MTN DEW CAN	SINGLE	Piece	1	\$0.00	Soft Drinks 🔀	Filters
Promotions		00012000001291	N/A	PEPSI 200Z	20 OZ	Weight	1	\$0.00	Soft Drinks 🗙	Valid (96)
Item Tags		00012000001307	N/A	PEPSI DT 200Z	20 OZ	Weight	1	\$0.00	Soft Drinks 🗙	Invalid (0)
Vendors		00012000001345	N/A	DIET MT DEW	200Z	Weight	1	\$0.00	Soft Drinks 🔀	

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.

- 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.

	Price book Categories	Items (CSV_Items)	Always Exported	d 📃 Availabl	le to Export	Non Exportable			± /	0 items in di <u>Select All</u>	raft Select None	Remo
1, Click Items.	Departments	GTIN	Child in parent	JPCA	UPCE	PLU	Image Sou	irce	Description	Add More	Save To	) × ]
	Price Groups								1	1		
	Promo Groups							<	Selected draft			
	Item Tags							-				
	Vendors											
	Quick Operations											
	Import Price Book from CR											
	Settings											
. Go to Drafts.	Tax rates											
a. Create a new draft.	Drafts											
2b. Select the	CSV_Items	•							•			
created draft.		<i>←</i>							$\rightarrow$			

- 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.

a. Click Add More.	0 items in draft <u>Select All Select None Remove All</u> Add More Save To V		Account Price Book Location Price Book Location Cash Register GateKeeper		
		>	Drafts Handheid From File	-	b. Select From File
			From file: C:\fakepath\cas Browse Type: CSV All SKU in file have check digit ①: Autodetect C Download example	× • •	c. Click <b>Browse</b> and then select a CSV file d. Click <b>Load Data</b> <b>Source</b>

- 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.



									Select the items you need	Save the selected items to the draft
Price book	Items	(Buffer)								From File
Categories	Selec	cted to Export 📃	Always Expo	orted Available	e to Export	Non Exportable			± 2	96 items loaded
Departments	🗆 ст	IN 🔺	Child in parent	Description	Size	Measure type	Units in Case	Cost	Category	3 items selected Select All Select None Remove All
Items		00012000000133	N/A	PEPSI CAN	SINGLE	Piece	1	\$0.00	Soft Drinks 🗙 📤	Save To Y
Price Groups		00012000000850	N/A	MTN DEW CAN	SINGLE	Piece	1	\$0.00	Soft Drinks 🗙	Eiltore
Promotions	•	00012000001291	N/A	PEPSI 200Z	20 OZ	Weight	1	\$0.00	Soft Drinks 🗙	Valid (96)
Item Tags	•	00012000001307	N/A	PEPSI DT 200Z	20 OZ	Weight	1	\$0.00	Soft Drinks 🗙	Invalid (0)
Vendors		00012000001345	N/A	DIET MT DEW	200Z	Weight	1	\$0.00	Soft Drinks 🗙	

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.

- 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.



(i)

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.

a. Click Add More.	0 items in draft Select All Select None Remove All Add More Save To V	Account Price Boo Location Price Boo Location Cash Rey GateKeeper	k Jister	
		 Drafts Handheld Items to load: Location: Files:	Load Data Source 0 Orange × search ×	b. Select <b>Handheld</b> and then specify the import criteria c. Click <b>Load Data</b> 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.

									Select ti you i	he iten need	15		Save the sel items to the	ected draft
Price book	Item	ns (Buffer)										Handheld		
Categories	S	ielected to Export	Always Exp	orted Availabl	e to Export	Non Exportable				± .	ē	96 items load	ed	
Departments		GTIN 🔺	Child in parent	Description	Size	Measure type	Units	Cost	Category			Select All Se	eu lect None Re	emove All
Items		00012000000133	N/A	PEPSI CAN	SINGLE	Piece	1	\$0.00	Soft Drink	<b>6 X</b>	^	<u>belettyin</u> <u>be</u>		
Price Groups	-	0001200000135			SINGLE	11000		\$0.00	bort brinn	• •			Save to 1	
Promo Groups		0001200000850	N/A	MTN DEW CAN	SINGLE	Piece	1	\$0.00	Soft Drink	os 🗙		Filters	Current D	raft
Promotions		00012000001291	N/A	PEPSI 200Z	20 OZ	Weight	1	\$0.00	Soft Drink	is 🗙		Valid (96)	Drafts	- P
Item Tags		00012000001307	N/A	PEPSI DT 200Z	20 OZ	Weight	1	\$0.00	Soft Drink	us 🗙		Invalid (0)		
Vendors		00012000001345	N/A	DIET MT DEW	200Z	Weight	1	\$0.00	Soft Drink	us 🗙				

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:
  - o Categories, see Working with Price Book Categories.
  - o Departments, see Working with Price Book Departments.
  - o Price Groups, see Working with Price Book Price Groups.
  - o Promo Groups, see Working with Price Book Promo Groups.
  - o 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.

	Price book
	Categories
	Departments
1. Select Price	Items
book element.	Price Groups
	Promo Groups
	Promotions
	Item Tags
	Vendors
	Quick Operations
	Import Price Book from CR
	Settings
	Tax rates
2. Go to Drafts.	Drafts
	New_Items

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:
  - o Account Price Book
  - o GateKeeper (for more details, see Importing Data from GateKeeper)
  - o Drafts
  - o 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**.

Categories (Buffer)										51 catego	ries loaded	
Colorted to Supert 📕 Always Superted 💿 Available to Supert 💿 New Supertable									<u>,</u>	5 categori	es selected	
	Number	Name	Source	Description	GL #	Accept Incomplete Retail	GL Departme	- 44	ĺ	<u>Select All</u>	Save To	Remove All
	2	Tobacco	Account: Gu	Chewing Tobacc	222		122		^			-
	3	Dairy	Account: Gu	Canned Whippe	223		123					
	4	Ice Cream	Account: Gu	Ice Cream, Ice M	224		124					
	5	Groceries	Account: Gu	Canned Vegetab	225		125					
	6	Juices	Account: Gu	All Packaged, Ca	226		126					
	7	Motor Oil	Account: Gu	Includes All Pac	227		127					
	8	Auto Supplies	Account: Gu	Anti Freeze, Aut	228		128				N	

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:

(i)

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

- o Account Price Book
- o GateKeeper for more details, see Importing Data from GateKeeper.
- O Drafts
- o 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.
- 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.

🔚 (	Ca	tegories.csv 🗵
1		"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"
2	2	"1","Cigarettes","Account: Greyhound","National And Generic
		(Single Packs &
		Cartons)","3","","N","N","Y","","N","","N","","Y"
3	3	"2", "Tobacco", "Account: Greyhound", "Chewing Tobacco, Cigarette
		Papers, Cigars, Pipe Tobacco,
		Snuff","3","","N","N","N","","N","","N","","Y"
4	Į.	"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"
5	5	"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","","N","","

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.

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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 Num- ber	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 <b>Inventory Item</b> <b>Group Reconciliation</b> form for high risk items due to shortage.
Reject Pro- motions	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 Incom- plete Retail Invoices	No	Flag that allows a user to accept incomplete invoices for items. Poss- ible 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.
СМА	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 invent- ory 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.

Account Pri	ice Book	
Drafts		
From File		
	Load Da	ita Source
From file:		Browse
From file: Type:	CSV	Browse
From file: Type:	CSV	Browse

- 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.
- 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:
  - o Account Price Book
  - o GateKeeper (for more details, see Importing Data from GateKeeper).
  - o Location Cash Register
  - o Drafts
  - o 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.

- **o** Account Price Book
- o GateKeeper for more details, see Importing Data from GateKeeper.
- o 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.

#### **o** Drafts

o 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.
  - (i) 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.
- 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.



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 Cat- egory ID	No	Category ID that must be connected with the department.
Matched Cat- egory	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 - Fuel - Car Wash - Not for Sale - 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		
Food Stamp Allowed	No	Flag that allows a customer to use food stamps as a method of pay- ment. 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:
Blue Laws2	No	- "0" - No - "1" - Yes
СМА	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.

Account Pr	ice Book	
Drafts		
From File		
		Load Data Source
From file:		Browse
From file: Type:	CSV	Browse
From file: Type:	CSV	Browse

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



- o 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.
- 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:
  - o Account Price Book
  - o Location Price Book
  - o Location Cash Register
  - o GateKeeper
  - o Drafts
  - o Handheld
  - o File

(i)

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.

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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.

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Price Book   Categories	Items (Buffer)	Account Price Book
Departments	Selected for Import Always Imported Available for Import Not Importable	10 item(s) selected
Items Price Groups	GTIN Child uPC-A UPC-E PLU Source Description CR Description	Select All Select None Remove All
Promo Groups Promotions	Image: Constraint of the state of	Filters Valid (20)
Drafts	☑ 00026100005752 N/A 0261000057 02657512 Account: Gr NEWPORT M Newport Bo	Invalid (0)
Items_Global	2         00012000001314         N/A         0120000013         01213104         Account: of         20 02         MI DEW 20           2         00026100005738         N/A         0261000057         02657318         Account: Gr         NEWPORT M         Newport 10	
Items_Draft	☑ 00070847811169 N/A 0708478111 00000000 Account: Gr ENGERY D MONSTER €	
	O004900000413         N/A         049000004         04904403         Account: Gr         COKE CLSC         COKE CLSC           (         1         >         Items per page:         50         ~	< Back

- 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

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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

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#### **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.

Source			Guest	
Vendor				
5749. PEPSI BEVERAGES CO			Pepsi Be	~
Ok Cancel			12917.PEPSI BEVARAGE COMPANY 5749.PEPSI BEVERAGES CO	
	1	2	9301.Pepsi Bevarge Company 7928.Pepsi Beverage Co	

### **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.



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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.



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 <b>CR Description</b> 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 <b>Description</b> 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	<ul> <li>Ability to ask and assign any price on Cash Register. Possible values:</li> <li>Y: If the Prompt for Price check-box must be filled.</li> <li>N: If the Prompt for Price check-box must not be filled.</li> <li>Empty: If the Prompt for Price check-box must NOT be filled.</li> </ul>
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 <b>Cost</b> or <b>Negotiated Cost</b> 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
ls 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 Sta- tion	No	Flag to mark the item as inactive at the station (location) level. Poss- 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	For car wash items: number of days for which the wash code is valid (numeric value).
Car Wash Con- troller 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	<ul> <li>For Car Wash items: car wash sales location. Possible values:</li> <li>BOTH: the item is available for sale in the store and on a pump .</li> <li>INSIDE: the item is available for sale in the store only.</li> <li>If this field is left empty, the default value BOTH will be applied by the system.</li> </ul>
CRIND Car Wash Position on Screen	No	<ul> <li>This field is applicable only for the Car Wash items. Possible values:</li> <li>1, 2, or 3: Enter one of these digits, to define the item position on the CRIND screen.</li> <li>Empty: Leave this field empty, if you don't need to display the Car Wash item on the CRIND screen.</li> </ul>
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.
		Defines the item number for Bulloch cash registers. Possible values:
Bulloch Item		- 1-13: Enter the number of Bulloch POS machines installed on your
Number	Yes	account.
i tumber		- <b>Empty</b> : Leave this field blank, in case there are no Bulloch POS
		machines installed on your account.
		Flag to indicate if taxes for the item should be taken from the depart-
Tax Default		ment taxes for the station (location). Possible values:
from Depart-	No	- 1: Yes
ment		- 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.
		Flag to indicate that an item is tax-free. Possible values:
		- 0: The item is taxable
No Taxes	No	- 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.
Тах 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 <b>Product Code</b> 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.

Account Pri	ice Book		
Drafts			
From File			
		Load Dat	a Source
From file:			Browse
From file: Type:	CSV		Browse
From file: Type:	CSV	l example	Browse

- 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.
- 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.



**(i)** 

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 Туре	Yes	<ul> <li>SKU code type for the SKU code in the previous field. Possible values:</li> <li>- 0: UPCA</li> <li>- 1: UPCE</li> <li>- 2: EAN8</li> <li>- 3: EAN13</li> <li>- 4: PLU</li> <li>- 5: GTIN</li> </ul>
Description	Yes/No	Item name as it appears in the C-Store Office Price Book. This field is required if the <b>CR Description</b> 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 <b>Description</b> 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 par- ent 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	ltem B	10	7172030508	1000012677
1000012677	ltem C	3	7172000007	1000012667
1000012667	ltem D	15	1000012677	
7172030509	ltem E			7172000007
7172000007	Item B	2	7172030509	1000012663
1000012663	ltem 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
- (i) 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		Item code in one of supported formats:
		- PLU
	Yes	- 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		Item name as it appears in the C-Store Office Price Book. This field is
Description	Yes/No	required if the <b>CR Description</b> value is not provided.
	Yes/No	Item name that will appear at the cash register and in customer
CP Description		receipts. Must be no longer than 20 symbols. Longer values will be
CK Description		cropped. This field is required if the <b>Description</b> value is not
		provided.
		Flag indicating that this item is linkable. Possible values:
		- 1: Yes
Linkable	Optional	- 0: No
		This field must be populated to transfer linkable items and items to
		which they are linked.
CDV/ Itom	Ontional	Linked item SKU without a check digit. Must be populated for items
CRV Item	Optional	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.

## 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.

- 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.
  - 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.

It	ems (Buffer)					Location Price Book
Se	lected for Import	Always Imp	oorted Avai	lable for Import	Not Importa	7 item(s) loaded 7 item(s) selected
	GTIN	Child in parent	UPC-A	UPC-E	PLU	Select All Select None Remove All
	00028200003843 00028200003577 00026100005752 00012000001314 00026100005738 00070847811169	N/A N/A N/A N/A N/A	0282000038 0282000035 0261000057 0120000013 0261000057 0708478111	02838423 02835727 02657512 01213104 02657318		Filters ✓ Valid (7) ☐ Invalid (0)
	00049000000443	N/A	0490000004	04904403		

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.

It	Items (PLU_Items) 7 item(s) in draft							
Se	lected for Import	Always Imp	orted Avai	ilable for Import	Not Impo	7 item(s) selected Select All Select None Remove All		
	GTIN	Child in parent	UPC-A	UPC-E	PLU	Add More Save To Y		
	00028200003843	N/A	0282000038	02838423		Filters		
	00028200003577	N/A	0282000035	02835727		Valid (7) Invalid (0)		
	00026100005752	N/A	0261000057	02657512				
	00012000001314	N/A	0120000013	01213104				
	00026100005738	N/A	0261000057	02657318				
	00070847811169	N/A	0708478111					
	00049000000443	N/A	0490000004	04904403				

(j)

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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:
  - o Account Price Book



- o Location
- o Drafts
- o 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.
- 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.
- 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.



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 200z.
Retail price	No	Retail price for the price group at the station or cluster level.
lgnore fixed retail	No	Ignore fixed price flag when updating items for stations. Possible val- ues: - "0" = do not ignore - "1" = ignore
Reconciliation	No	ID populated automatically, obtained from the <b>Inventory Item</b> <b>Group Reconciliation</b> 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.

Account Pr	ice Book	
Drafts		
From File		
	Load	Data Source
From file:		Browse
Type:	CSV	~
	🗽 Download examp	ble
< Bac	k	

- 3. The downloaded file is provided in the XLSX format:
  - o 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.
- 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:
  - o Account Price Book
  - o Drafts
  - o 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:

(i)

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

- Account Price Book
- **o** Drafts
- o 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.
- 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.



The file that you use for import of promo groups data must have the following structure. Nonmandatory 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.

Account Pri	ice Book		
Drafts			
From File			
		Load Dat	a Source
		_	
From file:			Browse
From file: Type:	CSV		Browse
From file: Type:	CSV	d example	Browse ~

- 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.
- 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:
  - o Account Price Book
  - o Location
  - o Location Cash Register



#### o Drafts

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

Account Price Book				
Location				
Location Cash Register				
Drafts				
From File				
	Load Data Source			
From file:	C:\fakepath\cs\ Browse			
Туре:	ZIP ~			
	Download example			

- (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.

Account Price Bo	ok	
	Load Data	Source
Promotions to load:	21	Ŷ
Name:		
Active:		
Active From:	01/01/2018	~
Active To:	þ3/01/2018	~
Туре:	search	~

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.

Promotions (	Promotions (Buffer)							6 Promotions loaded					
Selected to Ex	cRIND Name	rted A	vailable to Source	Export Non Expo	rtable Price Cha Type	<sup>a</sup> QTY Thre	Unit cost	Reimburs	Date From	Date To	Inclusion type	Include Items	1 Promotions selected <u>Select All</u> <u>Select None</u> <u>Remove All</u> <u>Save To</u>
Group #	Group Name GATORADE 28 OZ	. Gatora	ACCOU	Quantity 0	3.00	2	\$1.12	ş0.00 Retail 0	08/04	10/31	Promo		
314916	Aquafi	Aquafi	Accou	Price modifier	2.00	2	\$0.75	\$0.00	08/04	08/31	Items		
■ 315382	Pepsi	2L 2	Accou	Price modifier	2.50	2	\$1.18	\$0.00	08/04	09/02	Promo		

- 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.



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

Field Name	Mandatory (Yes/No)	Description
		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
Record Type	Yes	with the promotion
		- Custom Group – if the row contains a custom group for the pro-
		motion 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 <b>Record Type</b> = Promotion	Type of inclusion. Possible values: - Item - Promo Group - Department
Custom Group ID#	Mandatory if <b>Record Type</b> = Custom Group <b>Promotion type</b> = Price Each Mix	Custom group ID, for groups of Price Each Mix promotions.
Custom Group Name	Mandatory if <b>Custom Group</b> ID# is not empty	Custom group name for Price Each Mix promotions.
SKU/Group ID#	Required if <b>Record Type =</b> Item <b>Record Type =</b> Promo Group <b>Record Type =</b> Department	SKU of the item of the promo group/department ID.



Field Name	Mandatory (Yes/No)	Description
SKU Type	Mandatory if <b>SKU/Group ID#</b> is not empty	Type of the value passed in <b>SKU/Group ID#</b> . 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 Descrip- tion	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. Poss- ible 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-



	Mandatory	Description			
Field Name	(Yes/No)	Description			
		ible values:			
		- 1 - Yes			
		- 0 - No			
Earn Points	N1 -	Flag indicating how loyalty points are earned. Possible values:			
Mode	NO	- \$ - 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 pro- motion. 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.



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	Description
	(Yes/No)	Description
	Each Mix	
	groups buy	-
	downs	
Custom Group	No	Optional custom group name for customer con-
Name	INO	venience.
Price Reduc-	Vac	Poimburgment amount in ¢
tion	res	Kembursment amount in \$.
Per Units	Yes	Units quantity for reimbursement.
		Reimbursement by sales or purchases mode. Poss-
Sold /	Voc	ible values:
Purchased	Tes	- 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.



#### **DPL File Structure**

The DPL file describes departments linked to promotions. For more details about the file structure, see

#### Working with Price Book Departments.





#### **PGL File Structure**

The PGL file describes promo groups linked to promotions.

늼 PG	iL.csv 🔀
1	"Number", "Name"
2	"2", "BASIC"
3	"4","CAMEL CORE"
4	"12", "KOOL"
5	"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.

Account Pr	ice Book	
Drafts		
From File		
	L	oad Data Source
From file:		Browse
Type:	CSV	~
	📓 Download exa	ample

- 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.
  - o On the **DatasourceTemplate** tab, fill data for the objects that you want to import.
- 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
  - o Drafts
  - o 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.

- o Account Price Book
- **o** Drafts

(i)

o 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.

	_		
📩 Iter	iTags.csv 🔣		
1	"Id","Parent Id","Number","Name","Description",	,"Allow	^
	Multiple","Linked GTIN list","Source Account Io	i"	
2	"205","0","5","NACS		
	Categories","","0","3680012885,52820012150,8910	00800119,891008001	
	21,90,1200017019,1250262677,7380000014,10000007	7332,41419714744,5	
	6565145800,81809400465","46"		
3	"239","0","6","Placements","","1","9825,1022835	5201,1777908053,19	
	80049484,2546968561,2802801442,2802801514,28028	301534,2802868399,	
	2802869353,2802875363,2802875454,2820019692,282	20019693,282001969	
	4,2820019695,3450063279,3525565639,3600005120,3	3600005123,3614405	
	020,3614405030,3700057445,3995691460,4023215589	9,4105300005,41053	¥



(i)

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.				
		Unique parent tag ID if it exists. Mandatory for child tags.				
Parent Id	Yes/No	(i) If the <b>Parent Id</b> 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. Poss- ible 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.

Account Pr	ice Book	
Drafts		
From File		
	Load Da	ata Source
From file:		Browse
Type:	CSV	~
	🗽 Download example	
< Bac	k	

- 3. The downloaded file is provided in the XLSX format:
  - o 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.
- 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:
  - o Account Price Book
  - o Location
  - (j)

Together with vendors, you can import all their items.



- o Drafts
- o 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.

Vendors (Buffer)									10 Vendor	s loaded
Selected to Evport 🔲 Alwaye Evported 🗌 Available to Evport 🗌 Non Evportable 🔹 🥇								10 Vendor	s selected	
Jelecter			Available to	Export		on Exportable	Type		Select All	Select None Remove All
Vendor #	Name	Source	Country	State -	Fuel	Expenses	Merchandise	Active		Save To \vee
2	Allentown Bakery	Account: Gu								Current Draft
3	Archway	Account: Gu								Drafts
4	Banner Coin Excha	Account: Gu						New_Vendo	rs Im	
7	American Bottling	Account: Gu	USA	1						
8	Dunkin Donuts	Account: Gu								

- 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.

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# vendors.csv 🔀

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	ls 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.

Account Pri	ce Book	
Drafts		
From File		
	Load Da	ata Source
From file:		Browse
From file: Type:	CSV	Browse
From file: Type:	CSV	Browse ~

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



- o 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.
- 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.



Account Price Book							
	Load Data Source						
Promo Group:	search ~	^					
Lottery:	Lottery Items Only 🛛 🎽						
Active Data:	Exclude Lottery Items Include Lottery Items						
Location Price Book	Lottery Items Only						
Location Cash Register							

- 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

Ite	Items (Buffer)													
	Selected to Export 📕 Always Exported 🗌 Available to Export 🗌 Non Exportable 🎿 🕹													
					PLU								Width	
	00644018112630	N/A	6440181126	00000000	0		Account: Gr	\$50,000 Pay Day	\$50,000 Pay		Piece	0	0	Â
	00999666555446	N/A	9996665554		0		Account: Gr	Shawns Game	Shawns Game		Piece	0	0	Г
	00644018116898	N/A	6440181168	00000000	0		Account: Gr	CANDY CANE CRO	CANDY CAN		Piece	0	0	
	00644018108558	N/A	6440181085	00000000	0		Account: Gr	20X THE MONEY_	20X THE MO		Piece	0	0	
	00644018112838	N/A	6440181128	00000000	0		Account: Gr	Pay Me	Pay Me		Piece	0	0	
	00644018111442	N/A	6440181114	00000000	0		Account: Gr	BUCKETS OF CASH	BUCKETS OF		Piece	0	0	
	00644018112333	N/A	6440181123	00000000	0		Account: Gr	Lucky 13	Lucky 13		Piece	0	0	÷
														•
+						1 2 3	4 5	17						<b>→</b>

- j. Save the selected items from the buffer to your draft. For details, see Saving Data from Buffer to Draft.
- 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	Description				
	(Yes/No)					
		Item code in one of supported formats:				
		- PLU				
		- UPCA				
SKU	Yes	- UPCE				
		- EAN8				
		- EAN13				
		- GTIN				
		SKU code type for the SKU code in the previous field. Possible values:				
		- 0: UPCA				
		- 1: UPCE				
SKU Type	Yes	- 2: EAN8				
		- 3: EAN13				
		- 4: PLU				
		- 5: GTIN				
Description	Yes	Item name as it appears in the C-Store Office Price Book.				
CP Description	Yes	Item name as it appears at the cash register and in customer receipts.				
ck Description		Must be no longer than 20 symbols. Longer values will be cropped.				
Size	No	Item size and units of measurements, for example: 20 oz.				
		Type of measurement units. Provided for QwickServe. Possible values:				
	No					
Measure Type		- 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	No	Decomposed of votal price for the itera				
Retail	INO	Recommended retail price for the item.				
Min Recom-	No	Minimum recommended rateil price for the item				
mended Retail	INU	winning recommended retail price for the item.				
Max Recom-	No	Maximum recommended retail price for the item				
mended Retail						

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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
ls 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				
ls 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 Con- troller Code	No	Not applicable.				
Wash Type	No	Not applicable.				
Wash Package Code	No	Not applicable.				
Tax Default from Depart- ment	No	<ul> <li>Flag to indicate if taxes for the item should be taken from the department taxes for the station (location). Possible values:</li> <li>- 1: yes</li> <li>- 0: no</li> <li>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.</li> </ul>				
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	<ul> <li>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:</li> <li>1:yes</li> <li>0: no</li> <li>The default value is. The field value should not be set to 1 if the</li> <li>Product Code field contains any value (not empty).</li> </ul>
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.

Account Pr	ice Book	
Drafts		
From File		
	Load D	ata Source
From file:		Browse
Type:	CSV	~
	😼 Download example	

- 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.
  - o On the **csvItemsTemplate** tab, fill data the for lottery games items that you want to import.
- 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:
  - o 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.

Account Stations	
	Load Data Source
Location:	Aramingo, Banksville, Bilı $^{\prime\prime}$



- 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.

												Select the and then	updated stations click <b>Save To</b> .	
G	General (Data Stations)												4 Stations in draft 2 Stations selected	
	Selected to	Export /	Always Exported	Available to Exp	ort Non Exportab	e						· · ·	Select All Select None R	temove All
E	External Site ID	CSO Site ID	Site Name	Site Alt Name	Street Address	City	Province	Postal Code	Phone Number	Company Name	Site Brand	Manager	Add More Save To	1
	1	82	Cochran	65	1630 Cochran rd	PITTSBURGH	PENNSYLV	15220	4125611884	SGII Group, LLC	Sunoco	Artsiom Zhdan 1		4
		1135	Centre		2350 Centre Avenue	PITTSBURGH	PENNSYLV	15219	1-412-683-0678	SGII Group, LLC	Sunoco			
		14806	Bilmar Building							SG Management	Exxon			

- 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:
  - o **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.

Account Stations	
Drafts	
	Load Data Source
Drafts:	Data Stations
My drafts:	

- o 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. Nonexisting stations are highlighted in red in the draft.

		On the cur - Only the - Cochra	rrent <b>Guest</b> AC-25 stati n, Centre, a	account ion data nd <b>Bilm</b>	t I can be up n <b>ar Buildir</b>	dated. ng stations do	on't exist.													
	<b>D</b> )CSTO	DREOFFICE														88 (	Guest ∨	٥		
DO	CS & FILES	DATA ENTR		RY PI	RICE BOOK	CUSTOMERS	VENDORS	TRANSACT	IONS RI	EPORTS						WORKFLO	ows	୭	•	Ø
Price	e book		General (Da	ata Statio	ons)											Account Stations				
Categ	ories		Selected to	Export 🔳 i	Always Exported	Available to Exp	ort 📃 Non Exportab	le						2				Load D	ata So	urce
Depar	tments		External Site ID	CSO Site ID	Site Name	Site Alt Name	Street Address	City	Province	Postal Code	Phone Number	Company Name	Site Brand	Manager	•	Location:	search			v
Price	Groups		1	82	Cochran	65	1630 Cochran rd	PITTSBURGH	PENNSYLV	15220	4125611884	SGII Group, LLC	Sunoco	Artsiom Zhdan	4					
Promo	o Groups			1135	Centre		2350 Centre Avenue	PITTSBURGH	PENNSYLV	15219	1-412-683-0678	SGII Group, LLC	Sunoco							
Promo	otions			14806	Bilmar Building							SG Management	Econ							
Item T	Tags			5229	AC-25								Exon							

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

											Select th data you n then	e st eed click	ations, v to upda c <b>Save</b> 1	which ate, and F <b>o</b> .	
General	(Data Stati	ons)											4 Stations i	in draft	
Selected	to Export 📕	Always Exported	Available to Ex	port 📃 Non Exportab	le						1		2 Stations	selected	
Externa Site ID	I CSO Site ID	Site Name	Site Alt Name	Street Address	City	Province	Postal Code	Phone Number	Company Name	Site Brand	Manager		Select All	Select None	Remove All
1	82	Cochran	65	1630 Cochran rd	PITTSBURGH	PENNSYLV	15220	4125611884	SGII Group, LLC	Sunoco	Artsiom Zhdan	t -	Pidd Piore		
	1135	Centre		2350 Centre Avenue	PITTSBURGH	PENNSYLV	15219	1-412-683-0678	SGII Group, LLC	Sunoco					
	14806	Bilmar Building							SG Management	Exxon					

- 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:



- 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:
  - o 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.

Account Stations	
	Load Data Source
Location:	Aramingo, Banksville, Bilı $^{\prime}$



- 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**.

							s tr upd	elect tl ading l ate, and	ne stations, which hours you need to d then click <b>Save</b> <sup>-</sup>	To.
Hours (STH)	- Alvera Da	and a sublick facet a loss facetable							4 Hours in draft 2 Hours selected	
Selected to Export	Always Exp	Available to Export Non Exportable						4 (	Select All Select None	Remove All
External Site ID	CSO Site ID ▲	Site Name	Work Day	From Opening Hour	From Opening Min	To Opening Hour	To Opening Min		Add More Save To	1
1	82	Cochran	Sun	0	1	23	59			
1	82	Cochran	Mon	0	1	22	0			
	1135	Centre	Fri	6	0	6	59			
	1135	Centre	Mon	7	0	23	59			

- 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:
  - **o 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.

i
Load Data Source
Data Stations



- 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.

Account Stations		
Drafts		
From File		
	Load Da	ata Source
From file:	C:\fakepath\csv	Browse
Type:	CSV	~
🖳 (	Download example	

#### 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.

	On the curren - Only the <b>Ba</b> - <b>Cochran</b> a	nt <b>Guest</b> ac I <b>nk Park</b> st nd <b>Centre</b> :	count: ation trading hours stations don't exist.	can be updated.							
Price book	Hours (STH)										5 Hours in draft
Categories	Selected to Exp	ort 📕 Always Ex	ported 📃 Available to Export	Non Exportable						± 2	Select All Select None Remove All
Departments	External Site TD	CSO Sile TD a	Site		Work Day	From Opening	From Opening	To Opening	To Opening		Add More Save To
Items	Site 10	Site ID =	Matthe			nour	1 Mart 1	mour	Part -		
Price Groups	1	82	Cochran		Sun	0	1	23	59		
Promo Groups	1	82	Cochran		Mon	0	1	22	0		
Promotions		1135	Centre		Fri	6	0	6	59		
Item Tags		1135	Centre		Mon	7	0	23	59		
Vendors Import Data Station	102	1141	Bank Park		Sun	12	20	14	30		

 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**.

								S a	elect nd th	the updated stations nen click <b>Save To</b> .	
Hours (STH)	rt 📃 Always Exp	orted 📃 Available to Export 🗌 Non Exportable						÷	2	5 Hours in draft 3 Hours selected	
External Site ID	CSO Site ID ▲	Site Name	Work Day	From Opening Hour	From Opening Min	To Opening Hour	To Opening Min			Add More Save To	Remove All
1	82	Cochran	Sun	0	1	23	59				
1	82	Cochran	Mon	0	1	22	0				
	1135	Centre	Fri	6	0	6	59				
	1135	Centre	Mon	7	0	23	59				

- 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.



Price Book V Import Departments from CR	
Import Data Station	
Import PB from CR    Department information will be pulled from the CR (including taxation, Department Type, Blue Laws, Food Stamps Allowed, Age Restriction, Product Code, etc.) to form your price book in CSO.	
Import Departments from CR Select Data Source Location and click "Next" to start.	
Import Items from CR Data Source Location	
Map Categories	
Quick Operations V	
Settings v	

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.

Price Book 🗸 Im	nport Departments from CR
Import Data Station 🗸 🗸	
Import PB from CR	Department information will be pulled from the CR (including taxation, Department Type, Blue Laws, Food Stamps Allowed, Age Restriction, Product Code, etc.) to form your price book in CSO.
Import Departments from CR	Select Data Source Location and click "Next" to start.
Import Items from CR Map Categories Quick Operations ~ Settings ~	Data Source Location Station 19495. Station 1 19496. Station 2 19497. Station 3

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.



Price Book	~	Import Departments from CR
Import Data Station	~	
Import PB from CR	^	Department information will be pulled from the CR (including taxation, Department Type, Blue Laws, Food Stamps Allowed, Age Restriction, Product Code, etc.) to form your price book in CSO.
Import Departments from CR		Select Data Source Location and click "Next" to start.
Import Items from CR		Data Source Location
Map Categories		19497. Station 3 Y Auto Import
Quick Operations	~	Next
Settings	~	<u> </u>

- 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.

Price Book	~	Departr	nents to Imp	ort							17 department(s) loaded
Import Data Station	~	Selected fo	r Import Alu	our Imported	Availa	ble for Import	Not Importable				5 departments(s) selected
Import PB from CR	^	Selected to	i import Am	ays imported	Availa	ible for import	Not importable				Select All Select None
Import Departments from CR		Number	Name	Min. Price	Max. Price	Default Price	Matched Category	Department Type	Tax1	Tax2	Back Next
Import Items from CR		<b>1</b>	Qwickserv	0	0	0					
Map Categories		2	Drinks	0	0	0					Filters Valid (17)
Quick Operations	~	<b>Z</b> 3	Chips	0	0	0					Invalid (0)
Settings	~	4	Auto	0	0	0					
		6	Groc T	0	0	0					
		33	MobileCoupon	0	0	0					
		75	Fuel Gift Cards	0	0	0					
		< 1	> Items per	r page: 50	~						

- 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.
- In the Proceed with export section, select the Import New Departments check box and click Yes.



Price Book	~	Please ch	neck the ab	ove Department ch	anges for acc	uracy. To pro	ceed, check	the "Import new de	epartments" checkbox	and click	'Yes".	
Import Data Station	~	PB Di	fference	s							2.2	5 department(s) loaded
		Status	Number	Name	Min. Price	Max. Price	Default Price	Matched Category	Department Type	Tax1	Tax2	2 new 3 contain differences
Import PB from CR	^	Update	1	Qwickserv	0	0	0					0 match the Account's data
Import Departments from CR		Undata	2	Drinks	0	0	0					Import New Departments:
Import Items from CR		opuate	2	DHINS	0	0	0					Proceed with import?
Map Categories		Update	3	Chips	0	0	0					Yes No
Quick Operations	~	New	6	Groc T	0	0	0					
Settings	~	New	33	MobileCoupon	0	0	0					
		_				-						
		<	1	Items per page	: 50 ~							

*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.





Price Book	~	Import Iten	ns from CR
Import Data Station	~	· · · · · · · · · · · · · · · · · · ·	
Import PB from CR	^	m	Items information will be pulled from the CR (including UPC number, Retail price, Description, and Department association etc.) to form your price book in CSO.
Import Departments from CR			Select Data Source Location and click "Next" to start.
Import Items from CR			Data Source Location
Map Categories			Type to search v
Quick Operations	~		Next
Settings	~	¢	

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.

Price Book	~	Import Items from CR
Import Data Station	~	
Import PB from CR	^	Items information will be pulled from the CR (including UPC number, Retail price, Description, and Department association etc.) to form your price book in CSO.
Import Departments from CR		Select Data Source Location and click "Next" to start.
Import Items from CR		Data Source Location
Map Categories		loca V 21192. location
Quick Operations	$\sim$	21183. location 2
Settings	~	Ŷ

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.

Price Book	~	Import Items from CR
Import Data Station	~	
Import PB from CR	^	Items information will be pulled from the CR (including UPC number, Retail price, Description, and Department association etc.) to form your price book in CSO.
Import Departments from CR		Select Data Source Location and click "Next" to start.
Import Items from CR		Data Source Location
Map Categories		21182. location <u> </u>
Quick Operations	~	Next
Settings	~	Ŷ

**(i)** 

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.

Price Book	~	Items to Import					9 item(s) loaded
Import Data Station	$\sim$						5 item(s) selected
Import PB from CR	^	Selected for Import	Always Imported Availab	le for Import	Not Importable	± 2	Select All Select None
Import Departments from CR		GTIN	UPC-A UPC-E	PLU	Description	CR Description Retail	Back Next
Import Items from CR		00003400022658	0034000226		KITKAT	KITKAT	
Map Categories		00008346070572	0083460705		SLIM FAST BA	SLIM FAST BA	Filters
Quick Operations	~	00008660000019	0086600000 00866149		ZIG ZAG PAPE	ZIG ZAG PAPE	Invalid (0)
Settings	~	00008660000026	0086600000 00866246		ZIG ZAG FREN	ZIG ZAG FREN	
		00008660000071	0086600000 00866741		ZIG ZAG PAPE	ZIG ZAG PAPE	
		00008660007322	0086600073		ZIG ZAG 1 1/	ZIG ZAG 1 1/	
		00008660097354	0086600973		ZIG ZAG PAPE	ZIG ZAG PAPE	
		00009800000524	0098000005 00985234		KINDER JOY EGGS	KINDER JOY	
		00009800001088	0098000010		TIC TAC MIXERS CH	TIC TAC MI	•

#### 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.
  - o Update by empty values: Select this option if you want to replace existing values in the



destination with empty values exported from the source.

Price Book	~	Caution! Set up the rule for empty values 3 9 item(s) loaded						
Import Data Station	~	by detailing empty values with not be imported. Or you may choose "Update by empty values by empty alues by empty from the corresponding fields of the draft." O Update by empty values 5 item(s) selected						
Import Departments from CR	~	Items will be updated by next conditions:  GTIN - Always import Retail - If different than existing Tax 3 - If existing value is empty Back Next						
Import Items from CR		UPC-A - Always import value Tax 4 - If existing value is empty UPC-E - Always import Category - If existing value is Product Code - If existing value is						
Map Categories		OPC:     Amage import     Exactly y = if existing value is     Product Code = if existing value is       PLU = Always import     empty     empty       EANB = Always import     Department - if existing value is     if active On Station - if existing       Description - if existing value is     empty     value is empty       Value is empty     value is empty						
Quick Operations	~							
Settings	~	CR Description - If existing value     Tax 1 - If existing value is empty       is empty     Tax 2 - If existing value is empty						
		Items to Import						
		Selected for Import Always Imported Available for Import Not Importable						
		GTIN UPC-A UPC-E PLU Description CR Retail						

- 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.

Price Book	~	Please ch	neck the above Item cha	nges for accuracy	. To proceed, ch	eck the "Import r	new items" check	box and click "Ye	s"		
Import Data Station	~	PB Di	fferences							2.2	5 item(s) loaded
Import DR from CD		Status	GTIN	UPC-A	UPC-E	PLU	Description	CR Description	Retail	Categoi	4 new 1 contain differences
Import PB from CR	^	New	00003400022658	0034000226		0	KITKAT	KITKAT		Candy	0 match the Account's data
Import Departments from CR		New	00008660000019	0086600000	00866149	0	ZIG ZAG PAPE	ZIG ZAG PAPE		Other T	Import New Items:
Import Items from CR				000000000	00000744		710 740 0405	710 740 9495	· .	011	Proceed with import?
Map Categories		Update	00008660000071	0086600000	00866741	0	ZIG ZAG PAPE	ZIG ZAG PAPE	,	Other 1	Yes No
Quick Operations	$\sim$	New	00008660007322	0086600073		0	ZIG ZAG 1 1/	ZIG ZAG 1 1/		Other T	
Settings	~	New	00008660097354	0086600973		0	ZIG ZAG PAPE	ZIG ZAG PAPE		Other T	
		<	1 > Items per	r page: 50 ~							

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.

(i)

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:
  - o Mix&Match
  - o Price Modifier
  - o Price Each Mix
  - o Link Saver
  - o 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.

Price Book	~	Inconcert Decom	ations from CD
Import Data Station	~	Import Prom	
Import PB from CR	^	$\sim$	Select Data Source Location and click "Next" to start.
Import Departments from CR		$\langle \rangle$	Data Source Location
Import Items from CR			~
Import Promotions from CR		•	Next
Import Fuel from Cash Register	r		
Import MOPs From CR			At least 1 of the following files or files combinations should be provided to submit import:
Map Categories			• ITT • MMT + ILT • CBT + ILT
Quick Operations	$\sim$		When providing MMT or CBT files (or both), the ILT file is required

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.

Price Book	V Internet Date	nations from CD
Import Data Station		motions from CR
Import PB from CR	•	Select Data Source Location and click "Next" to start.
Import Departments from CR	$( \land )$	Data Source Location
Import Items from CR		
Import Promotions from CR		16600. C00190
Import Fuel from Cash Register		16601. C00200 16602. C00207
Import MOPs From CR		16609. C00220
Map Categories		16604. C00251 16605. C00257
Quick Operations	~	• ITT
		• MMT + ILT • CBT + ILT
		When providing MMT or CBT files (or both), the ILT file is required

 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:

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

Price Book ~	Increase Dream	ustions from CD
Import Data Station		
Import PB from CR		Select Data Source Location and click "Next" to start.
Import Departments from CR Import Items from CR		Data Source Location 16603. C00188 ~
Import Promotions from CR	·	A file Brouge
Import Fuel from Cash Register Import MOPs From CR Map Categories Quick Operations		4 hies     Browse       Next   At least 1 of the following files or files combinations should be provided to submit import:       • ITT       • IMT + ILT       • CBT + ILT       When providing MMT or CBT files (or both), the ILT file is required

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.
- In the promotions list, select check boxes next to the promotions whose data you want to import and in the right pane, click **Next**.



Price Book v	Import Promotions	from CB					84 Promotions in draft
Import Data Station V	Import Promotions	I I I I I CK					6 item(s) selected
Import PB from CR	Selected for Import	Always Imported Available f	for Import Not Import	rtable		4 Z	Select All Select None
Import Departments from CR	Promo # CRIND	Name CR Nam Source T	ype Price Price Price Price Price Price	rice CI QTY Tax ype Thresht Reduce	Unit co: Reimbu Date Fr Date Tc Inclusic Loyality type Program	Include Items	Back Next
Import Promotions from CR	☑ 349524	3 for 3 for 5 Station: M	4ix & match 3 Ner	ew 2 Before Dis	\$0.00 \$0.00 05/ 01/ Pro		Filters
Import Fuel from Cash Register	☑ 349523	Pete Peter Station: M	fix & match 28.18 Ner	ew 2 After Disco	\$0.00 \$0.00 05/ 01/ Pro		Valid (84)
Import MOPs From CR	☑ ⊕ 349501	Cok Coke Station: M	4ix & match 5 Ner	ew 3 After Disco	\$0.00 \$0.00 05/ 01/ Items		Invalid (0)
Map Categories	349500	Pow Pow Station: M	1ix & match 5 Ner	ew 3 After Disco	\$0.00 \$0.00 05/ 01/ Items		
Quick Operations ~	☑ 349496	Mon Mons Station: M	1ix & match 6 Ner	ew 2 After Disco	\$0.00 \$0.00 05/ 01/ Items		
	☐ ⊕ 349494	Ice Ice P Station: M	fix & match 6 Ner	ew 3 After Disco	\$0.00 \$0.00 05/ 01/ Items		
	0	JP S JP S Station: M	fix & match 36.6 Ner	ew 2 After Disco	\$0.00 \$0.00 05/ 01/ Pro		
	<b>2</b> 🗉 0	Nest Nestl Station: M	4ix & match 2.5 Ner	ew 2 After Disco	\$0.00 \$0.00 05/ 01/ Items		
	<b>v</b> 🗉 0	B&H B&H Station: M	fix & match 22.14 Ner	ew 2 After Disco	\$0.00 \$0.00 05/ 01/ Pro		
	□ <b>■</b> 0	Play Playe Station: M	flix & match 27.44 Ner	ew 2 After Disco	\$0.00 \$0.00 05/ 01/ Items		
	<pre>     a 0     1 2 </pre>	dia dia M Station N Items per page: 50 ~	div&match 73.66 New	aw 7 After Diern	eñ nn eñ nñ n5/ n1/ P/A		

- 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**.

Price Book ~	Import Pro	omotions from	n CR - I	PB Diffe	erence	es												6 item(s) loaded
Transit DD from CD	Please check the	above Promotions char	nges for ao	curacy. To p	proceed o	lick "Yes"											2.2	2 new 2 contain differences
Import PB from CR A	Status	Promo # CRINE	D Name	CR Nam	Source	Туре	Price	Price Cl Type	QTY Thresh	Tax Reduce	Unit co	Reimbu	Date Fr	Date T	Inclusio	Loyalty Program	Include	2 match the Account's data
Import Departments from CR Import Items from CR	Update	349494	Mon Ice	Mons Ice P	Stat	Mix & match	6	New	3	After Disco	\$0.00	\$0.00	05/3	01/0	Items			Proceed with import?
Import Promotions from CR	Update	349524	Old 3 for	Old 3 for 5	Stat	Mix & match	3	New	2	Before Dis	\$0.00	\$0.00	05/3	01/0	Pro			Yes No
Import Fuel from Cash Register	Exist	349501	Cok	Coke	Stat	Mix & match	5	New	3	After Disco	\$0.00	\$0.00	05/3	01/0	Items			
Import MOPs From CR	Exist	349523	Pete	Peter	Stat	Mix & match	28.18	New	2	After Disco	\$0.00	\$0.00	05/3	01/0	Pro			
Map Categories	New	0	B&H	B&H	Stat	Mix & match	22.14	New	2	After Disco	\$0.00	\$0.00	05/3	01/0	Pro			
Quick Operations ~	New	0	JP S	JP Sp	Stat	Mix & match	36.6	New	2	After Disco	\$0.00	\$0.00	05/3	01/0	Pro			

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.



Price Book  V Import Data Station  V	Import completed successfully
Import PB from CR  Import Departments from CR Import Items from CR Import Promotions from CR Import Fuel from Cash Register Import MOPs From CR Map Categories	C00188[16603]         4 inserted         0 updated         2 advæted existing         0 without changes         0 partally imported         0 invalid records
Quick Operations ~	Import Errors & Price C QTY Tax Promo # CRINE Name CR Na Source Type Price C QTY Tax change Type Three Reduce Unit or Reimb Date F Date 1 type Program Includ Import Errors

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.
- o 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.

Price Book ~	Import Fuel from Cash Register
Import Data Station 🗸 🗸	
Import PB from CR	Select Data Source Location and click "Next" to start.
Quick Operations	Data Source Location Type to search
Export Items Retails to PIM	
Copy Upcoming PB Changes to PIM	Next
Item Taxonomy Assignment	
Retail Change Management	Ŷ
Import Fuel from Cash Register	
Settings ~	

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.

Price Book v	Import Fuel from Cash Register
Import Data Station V	
Import PB from CR v	Select Data Source Location and click "Next" to start.
Quick Operations	Data Source Location Station
Export Items Retails to PIM	Station 1
Copy Upcoming PB Changes to PIM	Station 2 Station 3
Item Taxonomy Assignment	
Retail Change Management	Q         Next
Import Fuel from Cash Register	
Settings ~	

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:



(i)

- **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.

Price Book ~	Import Fuel from Cash Register
Import Data Station 🛛 🗸	
Import PB from CR	Select Data Source Location and click "Next" to start.
Quick Operations	Data Source Location Station 1 · · · · · · · Auto Import
Export Items Retails to PIM	4 files Browse
Copy Upcoming PB Changes to PIM	
Item Taxonomy Assignment	Next
Retail Change Management	P
Import Fuel from Cash Register	
Settings ~	

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**.





Price Book v	Import Fuel from Cash Register
Import Data Station 🛛 🗸	
Import PB from CR	
Quick Operations	Import completed successfully
Export Items Retails to PIM	Information from the cash register located at <b>Station 1</b> has been added to your C-Store Office UST System settings
Copy Upcoming PB Changes to PIM	Fuel Imported
Item Taxonomy Assignment	
Retail Change Management	Puel Products     9 of 9       Tier Prices     9       Fuel Tanks     5 of 5
Import Fuel from Cash Register	
Settings	
	Review Imported Data Close

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

General	Station	1: Options : US	т			
General	*	MIX & F	JELS		V	UST EQUIPMENT
UST System	Station 1 Brand	<b>•</b>				
Fuel VIP	Fuel Brand:	Exxon				
Fuel Allowance	Products					
Cash Register	Used	Product	Purchased	Mixed	GL#	
		G	asoline			
Qwickserve		Regular				
MISC		Plus				
Daumlaada		Super				
Downloads		Ultra	•			

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

Price Book ~	Import Fue	l from Cash Register	
Import Data Station			
Import PB from CR	$\sim$		
Quick Operations		Import comp	oleted successfully
Export Items Retails to PIM		Information from the cash re	gister located at ${f Station 1}$ has been added to your C-Store Office UST System setting
Copy Upcoming PB Changes to PIN	1	Fuel Imported	
Item Taxonomy Assignment		-	
Retail Change Management	\$	Fuel Products Tier Prices	9 of 9 9
Import Fuel from Cash Register		Fuel Tanks	5 of 5
Settings ~			
		Review Imported Data	Close

(i) 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.





Price Book ~	Import MOPs From CR	
Import Data Station V		
Import PB from CR 🛛 🗸	Select Data Source Location and click "Next" to start.	
Quick Operations	Data Source Location	
Export Items Retails to PIM	19495. Station 1	
Copy Upcoming PB Changes to PIM	19490. Station 2 19497. Station 3	
Item Taxonomy Assignment		
Retail Change Management	P Next	
Import Fuel from Cash Register		
Import Item Name Translations		
Import MOPs From CR		
Settings ~		

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**.



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.





Price Book ~	Import MOPs From CR
Import Data Station 🛛 🗸	
Import PB from CR V	Information will be pulled from the cash register located at Location 01 into your C-Store Office UST System settings.
Quick Operations	It may take up to 15 minutes to import all the required data. Please do not close this window until a success notification appears.
Export Items Retails to PIM	
Copy Upcoming PB Changes to PIM	Importing MOPs
Item Taxonomy Assignment	
Retail Change Management	P
Import Fuel from Cash Register	
Import Item Name Translations	
Import MOPs From CR	
Settings ~	

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.

Station 1			-		
Base MOPs					
Name	CR name				
Cash					
FS					
Credit Card	3				
Other Card	2				
House Account					
ATM					
Coupons	COUPON				
Not Need Data					
Sustom MOPs					
Add New MOP					
Name	CR name	Туре	Disable manual entry	Glacc number	Del
Name	CR name	Type Non Cash	Disable manual entry	Glacc number	Delete MOP
Name DEBIT LOTTERY	CR name 4 9	Type Non Cash Non Cash	Disable manual entry	Glacc number	Delete MOP
Name DEBIT LOTTERY MAN CRED	CR name 4 9 5	Type           Non Cash           Non Cash           Non Cash	Disable manual entry	Glacc number	Delete MOP Delete MOP Delete MOP
Name DEBIT LOTTERY MAN CRED IN-HOUSE	CR name 4 9 5 6	Type       Non Cash       Non Cash       Non Cash       Non Cash       Non Cash	Disable manual entry	Glacc number	Delete MOP Delete MOP Delete MOP Delete MOP Delete MOP
Name DEBIT LOTTERY MAN CRED IN-HOUSE MAN DEBIT	CR name 4 9 5 6 6 7	Type           Non Cash           Non Cash           Non Cash           Non Cash           Non Cash           Non Cash	Disable manual entry	Glacc number	Delete MOP

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

(i) 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**.

# **(i)**

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.
- 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.

 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.

Price Book	~	Map Catego	ries
	~		
Import PB from CR	^		Categories mapping to Items (for those items in Price Book which
Import Departments from CR			are not mapped to any Categories). The information will be pulled from "Golden Price Book" which is a standard for items enrichment
Import Items from CR			services.
Import Promotions from CR			It takes a while to import all required data (usually from few seconds and up to 15 minutes).
Import Fuel from Cash Register			Please do not close this window until a success notification appear.
Import MOPs From CR		¢	
Map Categories			Mapping Categories 0 of 98160
Quick Operations	~		Mapping Categories by Departments
			0

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.

Price Book	~	Map Catego	ries		
Import Data Station	~				
Import PB from CR	^	$\sim$			
Import Departments from CR			Mapping complete	d successfully	
Import Items from CR			Information added into your C-Store Office	Price Book.	
Map Categories			Created Categories: 5	Items mapped: 55	
Quick Operations	~				
Settings	~	¢	Existing Categories: 1	Items mapped: 2	
			Unmapped Items by Departments:	Items included: 7	
			Hot Drinks Chips	4	
			QwickServe	1 1	

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

 $\Omega$ 

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	Verifone Verifone Ruby/Sapphire Ruby/Top		Verifone Ruby Commander	Gilbarco Passport
Import Departments from CR	-	-	-	-
Import Items from CR	-	-	-	-
Import Promotions from CR	-	-	-	-
Import Fuel from CR	•	0	0	Ð
Import MOPs from CR	•	•	0	Ð



# **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.

Price Book v	Export Items Retails to PIM
Import Data Station 🛛 🗸	
Import PB from CR	Location: 16576. C00008
Quick Operations	Browse
Export Items Retails to PIM	All SKU in file have check digit 1: Autodetect
Copy Upcoming PB Changes to PIM	Download Example Next
Item Taxonomy Assignment	Import log for previous launches
Retail Change Management	
Import Fuel from Cash Register	
Import Item Name Translations	
Settings ~	

- 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.

Price Book	~	Export Items Retails to PIM
Import Data Station	~	Lastin Tarkanat Y
Import PB from CR	~	Location: Type to search
Quick Operations	^	Itemsketalls.xisx Browse
Export Items Retails to PIM		All SKU in file have check digit ①: Autodetect
Copy Upcoming PB Changes to	o PIM	See Download Example Next
Item Taxonomy Assignment		Import log for previous launches
Retail Change Management		
Import Fuel from Cash Registe	er	
Import Item Name Translation	15	
Settings	~	

- 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.
  - o 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.

Price Book ~	Export Items Retails to PIM	13095 item(s) loaded		
Import Data Station V		Select All Select None		
Import PB from CR	Selected for Import Always Imported Av	ailable for Import Not Importable	* /	Update by empty values:
Quick Operations	GTIN Description	Category Recommended Retail	Apply Recommended Retail	Delete upcoming:
Export Items Retails to PIM	00028200003843 MARLBORO GOLD PK BOX	Confectionery (1) \$16.00	0 Yes	Retail as Active:
Copy Upcoming PB Changes to PIM	00028200003577 MARLBORO BOX	Cigarettes (2) 16.00	Yes	Back Save To 💙
Item Taxonomy Assignment	D00026100005752 PEPSI 200Z	Packaged Beverag	Yes	Filters
Retail Change Management	00012000001314 MT DEW 200Z	Packaged Beverag		Valid (13095)
Import Fuel from Cash Register	00026100005738 NEWPORT BOX	Cigarettes (2)	Yes	Invalid (0)
Settings v	00611269818994 RED BULL 120Z	Packaged Beverag	Yes	
	00611269991000 RED BULL 8.40Z	Packaged Beverag	Yes	
	1 2 3 4 5 262	Titems per page: 50 ~		

- 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.

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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.

Price Book v	Export Items Retails to PIM	13095 item(s) loaded		
Import Data Station 🗸 🗸		6 item(s) selected		
Import PB from CR 🛛 🗸	Selected for Import Always Imported Avai	Not Import Not Importable	* 2	Select All Select None
Quick Operations	GTIN Description	Category Recommended Retail	Apply Recommended Retail	Update by empty values:
Export Items Retails to PIM	2 00012000001314 MT DEW 200Z	Packaged Beverag	\$3.00	Send Apply Recommended
Copy Upcoming PB Changes to PIM	☑ 00026100005738 NEWPORT BOX	Cigarettes (2)	\$3.00 Yes	Retail as Active:
Item Taxonomy Assignment	☑ 00611269818994 RED BULL 12OZ	Packaged Beverag	\$3.00 Yes	Back Save To 🗡
Retail Change Management	☑ 00611269991000 RED BULL 8.4OZ	Packaged Beverag	\$3.00 Yes	Filters
Import Fuel from Cash Register	✓ 00025900227265 SWISHER SWEETS CLASSI	Other Tobacco Pr	\$1.50 Yes	Valid (13095)
Import Item Name Translations	2 00012000001291 PEPSI 200Z	Packaged Beverag	\$1.75	Invalid (0)
Settings ~				
	00078000082401 DR PEP 200Z	Packaged Beverag		
	<1 2 3 4 5 262	> Items per page: 50 ×		

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

Price Book	~	Export Items Retails to PIM			Close
Import Data Station	~				
Import PB from CR	~	Source: C00008 Process start: 09/03/19 05:08 PM Process finish: 09/03/19 05:08 PM Destination location: C00008;	Destination	Exported	
Quick Operations	^		(16576) C00008	6	
Export Items Retails to PIM					
Copy Upcoming PB Changes to PIM		The export process was successfully completed			
Item Taxonomy Assignment					
Retail Change Management					
Import Fuel from Cash Regist	er				
Import Item Name Translation	ns				
Settings	~				

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.
  - o 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.
- o 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:
  - o Min Retail <= Current Retail, Recommended Retail
  - o 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.



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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.
  - o 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:
  - o **0**: Item will be active for sale.
  - o 1: Item will be inactive for sale.

The status will be applied:

- o Immediately, if the Status Start Date field is empty
- o 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.

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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.

Export Items Retails to PIM									
Selected to Export	Selected to Export 📃 Always Exported 📃 Available to Export 🗌 Non Exportable								
GTIN	Description	Recommenc Lock Reco	mmended Min Re	tail Max Retail	Cost	Inactive			
00076171101051	LIL TREE VANI	\$10.0 2 Sort Asc	cending \$	5.00 \$25.00	\$0.00	A 1			
00893794001014	RACEPRO ATF	\$0.0 Sort Des	scending \$1	1.93 \$64.35	\$0.00				
00643654001308	HINNANT VYDS	\$0.0	5 <b>a</b>	6 00 ¢75 00	\$0.00				
0000000102476	CDeposit Plastic	\$2.0 Filters		GTIN	s0.00				
0000000116466	CDep PlastWat	\$2.00	s for export	Description	▶ Choos	e condition			
00056986433769	AUTO BULB 11	\$10.00		Recommended Ret	ail 🕨 🗌	If different than exis	sting valu		
00717854211024	Michelina's Noo	\$15.00		Lock Recommende Retai	d 🕨 🛄	Always export	mpty		

# **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.
  - o If you want to display items of all categories, leave the text field empty.
- 4. Press ENTER on the keyboard.

Price book	*	Export Items Ret	ails to PIM									6981 items loaded
Import Data Station	*	Selected to Export	Always Export	ed 📃 Available to	Exp	ort 🗌 Non Exportable	2			±	2	Select All Select None
Quick Operations	^	GTIN	Description	Category	~ {	Recommende Recomm Retail Start Dat	ende xe				Loci Reti	Back Save To 🗡
Import Price Book from CR		0000000100038	Thirst Buster	Cold Cup (9)	ĝ↓	Sort Ascending		\$0.00		\$2.29	~	Filters
Export Items Retails to PIM		00681284001022	Cookie Club	Fast Food (13)	¥↑	Sort Descending		\$0.00		\$0.00		<ul> <li>Category : Confectionery, Dairy, De</li> </ul>
Item Taxonomy Assignment		00774175024283	SMART USB	Non-foods (18)		Columns		\$0.00		\$8.99	1	Meats & Produce, Grocery
Settings	~	00799366462217	Google Play	Gift Cards (66)		Filters 🕨		_		\$15.00		
		00818094004732	Rockstar Pur	Non-carbonated S	•	Columns for export \$0.00		Confectionery	-	\$3.30		
		05018131909302	Deli2Go Bbq	Sandwiches (12)		\$0.00		Tobecco		\$0.00		
		00076171520036	Clean Laund	Automotive (Non-		\$0.00		Dairy		\$3.89		
		0000000107136	Breakfast Sa	Bakery: On-site (1	6)	\$0.00		Deli Meats & Produce Grocery		\$3.99		
		0000000119955	12 oz Java C	Sandwiches (12)		\$0.00		Health & Beauty		\$0.00	Ň	
		←		1 2 3		5 140		Non-carbonated Soft Dr	inks	-	•	

*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.
- 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.
- 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.

Price Book	~	Export Items Retails	Export Items Retails to PIM							
Import Data Station	~									
Import PB from CR	^	Location: Type to sear	ch			Ť				
Import Departments from CR						Browse				
Import Items from CR		All SKU in file have check digit 🤇	):	Au	todetect	~				
Import Promotions from CR		📡 Download Example				Next				
Import Fuel from Cash Register										
Import MOPs From CR		Import log for previous la	inches				^			
Map Categories		User Name	Date	Total Items	Exported Items	Warnings	Not Exported Items			
Quick Operations	^	PIM_DemoAdmin PIM_Demo	01/22/20	14524	14088	12465	436			
Export Items Retails to PIM		PIM_DemoAdmin PIM_Demo	01/22/20	22	22	0	0			
Copy Upcoming PB Changes to F	MIY	PIM_DemoAdmin PIM_Demo	01/17/20	10648	10648	0	0			
Item Taxonomy Assignment		PIM_DemoAdmin PIM_Demo	01/17/20	10648	10648	0	0			
Retail Change Management		PIM_DemoAdmin PIM_Demo	01/17/20	10648	10648	0	0			
Import Item Name Translations		PIM_DemoAdmin PIM_Demo	01/17/20	1452	1452	338	0			

- 3. In the **Import log for previous launches** list, you can see the following information about each previous data export to PIM:
  - o User Name: The name of the user who performed the data updates and export.
  - o Date: The date of the data export.
  - o Total Items: The number of the updated items that were sent to export.
  - o **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.

Export Items	Retails to PIM				± 2
The export proc	ess was completed with issues	Destination	Exported Items	Not Exported Items	Warnings
Source: Macros User Name: PII	PimExample (46).xlsx 1_DemoAdmin PIM_DemoAdmin	(17751) BO0001	483	1	5
Process start:	01/17/20 11:56 AM	(17752) BO0002	483	1	5
Destination loca	tion:	(17753) BO0003	397	87	3
BO0001; BO000 BO0009; BO001 BO0016; BO001	2; BO0003; BO0004; BO0003; BO0005; BO0007; BO0008; 0; B00011; B00012; B00013; B00014; B00015; B00017; 5; B0011; B00020; B000021; B00022;	(17754) BO0004	484	0	5
		(17755) BO0005	484	0	8
Details for not up	dated items	(17756) BO0006	484	0	8
UPC	JPC Error Description 31809400438 Recommended retail "3.99" is out of min/max retail range [9		484	0	4
81809400438			484	0	8



- 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.
  - o 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:



- 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.

Price book	~	Copy Upcoming	g PB Changes to PIM			Category:	
Import Data Station	~	1 Settings 2	Export (Draft) 3 Export Results			Department:	
Quick Operations	^					Promo Group:	
Import Price Book from CR		Source location:	C00008	~		Active Items Only:	
Export Items Retails to PIM		Destination locations:	Provinces & Territories: Alberta,Banff,C0003	5,C07757,Airc ~		Close	
Copy Upcoming PB Changes	to PIM		Enter at least 3 characters				
Item Taxonomy Assignment		Import log for prev	Operating Platform	^			
Settings	*		Provinces & Territories				
			Alberta				
			📃 🗄 British Columbia				
			Abbotsford				
			C00176				
			C10120	~			
			1		1		

- 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.
  - o 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.



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

Price book	~	Copy Upcoming PB Changes to PIM	Category:	Tobacco	~
Import Data Station	~	1 Settings 2 Export (Draft) 3 Export Results	Department:	search	~
Quick Operations	^		Promo Group:	search	~
Import Price Book from CR		Source location: C00008 ×	Active Items Only:	<b>V</b>	
Export Items Retails to PIM			Close	Next	
Copy Upcoming PB Changes to	PIM	Destination locations: Provinces & Territories: Alberta,Banff,C00035,C07757,Airc ×			
Item Taxonomy Assignment		Import log for previous launches			
Settings	~				

- 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.

Сс	ppy Upcoming PB Changes to PIM										
1	Settings 2 Export (Draft) 3 Export Resu	ilts									
										± ./	è
	UPC~	Name	Current status	Category	Department	Upcoming type	Upcoming value	Upcoming start date	Errors		
	6190013032	Accord Ment	Active	3. Tobacco	3. Tobacco						
	+ 6190013027	Accord Selec	Active	3. Tobacco	3. Tobacco						
	+ 6190013025	Accord Selec	Active	3. Tobacco	3. Tobacco						
	+ 6190013023	Accord Reg	Active	3. Tobacco	3. Tobacco						
	<b>10001</b>	Thirst Buste	Active	4. Dairy	4. Dairy						
						Current Retail	25.00	01/05/19			
						Recommended Retail	25.00	01/05/19			
						Max Retail	25.00	01/05/19			
-	_										-

 $\Omega$ 

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.

 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.
- 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.

Price book	~	Copy Upcoming PB Change	es to PIM					5 items loaded
Import Data Station	~	1 Settings 2 Export (Draft)	Export Results					1 items selected
Quick Operations	^						L 2	Select All Select None Delete all upcoming values at
Import Price Book from CR		UPC 🗸 🛛 Name 🛛 C	Current status Category	Department	Upcoming type	Upcoming va	lue Upcc	destination locations before export:
Export Items Retails to PIM		🔄 🗄 6190013032 Accord Ment A	Active 3. Tobacco	3. Tobacco			~	Back Next
Copy Upcoming PB Changes t	o PIM	6190013027 Accord Selec. A	Active 3. Tobacco	3. Tobacco				
Item Taxonomy Assignment								Filters
Settings	~	6190013025 Accord Selec A	Active 3. Tobacco	3. Tobacco				Valid (5)
5		E 6190013023 Accord Reg A	Active 3. Tobacco	3. Tobacco				Invalid (0)
		I0001 Thirst Buste A	Active 4. Dairy	4. Dairy				
					Current Retail	25.00	0	
					Recommended Retail	25.00	0	
					Max Retail	25.00	o ~	
		<					>	
		←	1				$\rightarrow$	

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.

Price book	*	Copy Upcoming PB Changes to PIM				CI
Import Data Station	~					
Quick Operations	^	Process start: 01/04/19 10:44 PM	Destination	Export	ted	
Import Price Book from CR		Source location: C00008	(16578) C00035	1	^	
Export Items Retails to PIM		Destination locations: C00035; C00045; C00058; C00068; C00089; C00111; C00142; C00146; C00154;	(16582) C00045	1		
Copy Upcoming PB Changes t	o PIM	C00158; C00163; C00174; C00176; C00186; C00188; C00190; C00207; C00208; C00251; C00257; C00259; C00319; C00323; C00353; C00367; C00463; C00488;	(16583) C00058	1		
Item Taxonomy Assignment		C00592; C00965; C00990; C00997; C0172; C01766; C01772; C01786; C01782; C01885; C01927; C02901; C03403; C03447; C05838; C07486; C07601; C07757; C00554; C10103; C10120; C10151; C10381; C10400; C10404; C10454; C10606;	(16581) C00068	1		
Settings	~	C10626; C10653; C10667; C11407; C11425; C11451; C11485; C11932; C11932; C11940; C11943; C11993; C11994; C11995; C11996; C12058; C12059; C12537; C12562;	(16585) C00089	1		
		C12563; C20294; C21607; C21720; C21721; C21976; C21993; C22006; C22278; C22411; C22421; C22427; C22436; C22437; C22439; C22508; C22534; C22546	(16584) C00111	1		
		The export process was successfully completed	(16587) C00142	1		
			(16590) C00146	1		
			(16589) C00154	1		
			(10303) C00154	1		
			(16593) C00158	1	~	
			<	>		



#### **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**.

Price book	~	Copy Upcoming P	B Changes to PIM						5 items loaded
Import Data Station	~	1 Settings 2 E	<b>Export (Draft)</b> 3 Exp	ort Results					Select All Select None
Quick Operations	^							± 2	Delete all upcoming values at destination locations before export:
Import Price Book from CR		UPC	~ Name ~	Current status	Category	Department	Upcoming type	Upcomine	Back Next
Export Items Retails to PIM		77417510006	2↓ Sort Ascending	Active	26. Video	26. Video			
Copy Upcoming PB Changes to Item Taxonomy Assignment	PIM	5051000041	Sort Descending	Active	26. Video	26. Video			Filters  Valid (5)
Settings	•	77417510102	Eilters	Active	26. Video	26. Video			Invalid (0)
		10194	\$1.49 Video Kentar	Delisted	26. Video	26. Video			
		10193	\$0.99 Video Rental	Delisted	26. Video	26. Video			
		1				_			
		←		1				→	

• 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.

Price book 🗸	Copy Upcoming PB Changes to PIM	5 items filtered of total 9 items loaded
Import Data Station 🗸	1 Settings 2 Export (Draft) 3 Export Results	Select All Select None
Quick Operations	± 2	Delete all upcoming values at destination locations before export:
Import Price Book from CR	UPC Name Current status Category Department Upcoming type Upcoming val	Back Next
Export Items Retails to PIM	Sof51000041 PREVIOUSL Active 26. Video 24 Sort Ascending	
Copy Upcoming PB Changes to PIM	□ 🔄 77417510006 PREVIOUSL Active 26. Video Xideo	Filters
Sottings	T77417510102 Preiously Vie Active 26. Video	Invalid (0)
Settings +	■ 10193 \$0.99 Video Delisted 26. Video Toharro	<ul> <li>Category : 26</li> <li>Department : 26</li> </ul>
	Image: 10194     \$1.49 Video     Delisted     26. Video     26. Video	
	>	
	← 1 →	

#### **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.

Price book	Copy Upcoming PB Changes to PIM	Category: Video, Tobacco ×
Import Data Station	1 Settings 2 Export (Draft) 3 Export Results	Department: search ×
Quick Operations		Promo Group: search *
Import Price Book from CR	Source location: C00008 ~	Active Items Only:
Export Items Retails to PIM		Close Next
Copy Upcoming PB Changes to P	Destination locations: Provinces & Territories: C00176	
Item Taxonomy Assignment	Import log for previous launches	
Settings		

# 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 pur- pose only. This field will be ignored when importing (will not be updated for the item).
ltem 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 cor- responding item row in a column with the corresponding root tag as the header (to which the item tag belongs). For details, see the <b>Data Example</b> 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.
- 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	В	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:

- 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.

Price Book v	Item Taxonomy Assignment
Import Data Station 🛛 🗸	
Import PB from CR 🛛 🗸	ItemsTaxonomyDatasource.xlsx Browse
Quick Operations	All SKU in file have check digit 1: Yes
Export Items Retails to PIM	Download Example
Copy Upcoming PB Changes to PIM	
Item Taxonomy Assignment	
Retail Change Management	
Import Fuel from Cash Register	
Import Item Name Translations	
Settings v	

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.





- 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.
- Select the items whose taxonomy you want to import and then in the Data Sources panel, click Import.

Price Book ~	Item Taxonomy	/ Assignment					3 filtered of total 4 item(s) loaded
Import Data Station V							3 item(s) selected
Import PB from CR V	Selected for Import	Always Imported	Available for In	Not Import	table	* <	Select All Select None
Quick Operations	🗹 gtin	Item Name	Global Class	Conexxus (PCATS)	Brand Manufacturer Errors		Back Import
Export Items Retails to PIM	0000000040006	Candy Large	CR	General Candy	Smartfoods, Inc.		The second se
Copy Upcoming PB Changes to PIM	0000000030007	Candy Small	CR	General Candy	Smartfoods, Inc.		Filters Valid (3)
Item Taxonomy Assignment	00000000010047	Cheese Pizza	CR	Frozen Foods	Smartfoods, Inc.		Invalid (1)
Retail Change Management							
Import Fuel from Cash Register							
Import Item Name Translations							
Settings ~							
	< 1 > It	ems per page: 50	<u> </u>				

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

Price Book v	Station 01	
Import Data Station V	Created "Item – Item Tag" connections: 9 Updated "Item – Item Tag" connections: 0	3 filtered of total 4 item(s) loaded 3 item(s) selected
Import PB from CR v		Select All Select None
Quick Operations		Back Import
Export Items Retails to PIM	Close	
Copy Upcoming PB Changes to PIM	Item Taxonomy Assignment	Filters
Item Taxonomy Assignment	Selected for Import Always Imported Available for Import Not Importable	<ul> <li>Valid (3)</li> <li>Invalid (1)</li> </ul>
Retail Change Management		
Import Fuel from Cash Register	gtin Item Name Global Class Conexxus (PCATS) Brand Manufacturer Errors	
Import Item Name Translations	✓ 0000000040006 Candy Large CR General Candy Smartfoods, Inc.	
Settings ~	☑ 0000000030007 Candy Small CR General Candy Smartfoods, Inc.	
	☑ 0000000010047 Cheese Pizza CR Frozen Foods Smartfoods, Inc.	
	C I > Items per page: 50 ~	

## **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:
  - o Negotiated cost and max recommended retail
  - o Current retail and actual, promotion or negotiated cost
  - o 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:

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

					/
Setup Postpone	Negotiated Cost	Print stickers	Convert to Excel	Retail Change M	lanagement
Select stations:	C00009 C00016 C00026 C00035 C00045 C00058 C00068 C00084 C00084 C00089 C00111		Add > Remove Add All > Remove All	C00008	*

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**.

DOCS & FILES DATA ENTR	INVENTORY PRICE BOOK CUSTOMERS VENDORS TRANSACTIONS REPORTS
Price Book 🗸	Retail Change Management
Import Data Station 🗸	Location: 16576. C00008 ~
Import PB from CR 🗸 🗸	Next
Quick Operations	
Export Items Retails to PIM	
Copy Upcoming PB Changes to PIM	
Item Taxonomy Assignment	
Retail Change Management	
Settings 🗸 🗸	

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**.

	Load	Data Source
Item(s) to load:	100	Ŷ
Vendor:	search	~
Manufacturer:	search	
Department:	search	~
Category:	search	~
Price Group:	search	~
Promo Group:	search	~
Lottery:	Exclude Lotter	y Ite 🎽
Active Data:		
Is Not For Sale:		
rom file		
< Back		



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

DOCS & FILES DATA ENTRY	INVENTORY PRIC	CE BOOK CUSTOME	RS VENDORS	TRANSACTIONS REPORTS		Workflows 🔊 🕜 📝
Price Book 🗸 ˆ	Retail Change Ma	nagement: C00008				4492 item(s) loaded
Import Data Station 🐱	Selected for Import	Always Imported A	vailable for Import	Not Importable Change by:      O Percent	🔘 \$ Amount	3 item(s) selected
Import PB from CR 🗸	GTIN 🔺	Description Min Rec Retail	ommended Max Re Retail	ecommended Current Retail Vendor	Negotiated Cost	Select All Select None
Quick Operations	0000000102612	CDeposit Ga	\$0.00	\$0.00 \$0.00	\$0.00	Back Add More Save To 🗸
Export Items Retails to PIM	0000000102629	Container D	\$0.00	\$0.00 \$0.00	\$0.00	Filters
Copy Upcoming PB Changes to PIM	<ul><li>0000000102759</li></ul>	Savory - Lar	\$0.00	\$0.00 \$0.00	\$0.00	<ul> <li>Valid (4492)</li> <li>Invelid (1486)</li> </ul>
Item Taxonomy Assignment	0000000102773	Savory - Sm	\$0.00	\$0.00 \$0.00	\$0.00	
Retail Change Management 🗸 🗸	0000000103053	GEco Fee Al	\$0.00	\$0.02 \$0.02	\$0.00	
	<ul><li>0000000103060</li></ul>	GEco FeePla	\$0.00	\$0.02 \$0.02	\$0.00	
	0000000103077	GEco FeePla	\$0.00	\$0.02 \$0.02	\$0.00	
	0000000103084	GEco FeePla	\$0.00	\$0.02 \$0.02	\$0.00	
	0000000103091	GEco FeePla	\$0.00	\$0.02 \$0.02	\$0.00	
	٢				>	
	←	1	<b>2</b> 3 4 5	90	<b>→</b>	

- 5. Once the items data is loaded, you can perform the following activities:
  - o Analyze the GPM for items
  - o Set new current retail prices for items

# PETROSOFT

#### 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):

- o Actual cost specified in the invoice
- o Promotion cost
- o 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.

DOCS & FILES DATA ENTRY	INVENTORY PRIC	E BOOK CUSTO	MERS VEND	ORS TRANSACTIONS	REPORTS	WorkFlows 🔊 💡 🕼
Price Book 🗸 ^	4486 item(s) loaded					
Import Data Station 🐱	Selected for Import	Always Imported	Available for Imp	ort Not Importable Char	nge by: 🔘 Percent 🛛 🧕	\$ Amount 2 item(s) selected
Import PB from CR 🐱	ription Min Recommer Retail	nded Max Recommer Retail	nded Current Retail	Actual GPM Max GPM	Projected GPM GPM Difference	e Errors
Quick Operations	:t Buster	\$0.01	\$9.99 \$9.99	54.45%	54.45% 0.00%	Add More Save to V
Export Items Retails to PIM	Vave 34	\$0.00	\$0.00 \$0.00		0.00%	Filters
Copy Upcoming PB Changes to PIM	Slush 4	\$0.00	\$1.69 \$1.69		0.00%	<ul> <li>Valid (4486)</li> <li>Invalid (1492)</li> </ul>
Item Taxonomy Assignment	Cappuc	\$0.00	\$2.69 2.65 🗘	36.43%	36.43% 0.00%	
Retail Change Management 🗸 🗸	t Buster	\$0.00	\$2.09 \$2.09	65.07%	65.07% 0.00%	
	t Buster	\$0.00	\$1.39 \$1.39	65.47%	65.47% 0.00%	
	1 Each	\$0.00	\$0.00 \$0.00		0.00%	
	r Grill C	\$0.00	\$1.99 \$1.99	41.71%	41.71% 0.00%	
	r Grill T	\$0.00	\$2.39 \$2.39	30.96%	30.96% 0.00%	v
						,
	←		<b>1</b> 2 3 4	5 90		<b>→</b>

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.

(i)



DOCS & FILES D	OATA ENTRY	INVENT	ORY	PRICE BOOK	CUSTOM	ERS VENI	DORS TR	ANSACTION	IS REPOF	RTS		WORKF	LOWS	୭	?	C
Price Book	*	Retail (	Change	e Managemei	nt: C0000	8						2 filtered of	total 10 i	tem(s)	loade	d
Import Data Stat	ion 🗸	Select	ted for Im	nport 📃 Always I	mported	Available for Im	port Not	Importable Ch	ange by: 🔘 F	Percent 💿 \$ Amou	unt	Select All	Select Nor	ne		
Import PB from 0	CR 🗸	nded Cu Re	urrent etail	Vendor	Negotiated Cost	Actual GPM	Max GPM	Projected GPM	GPM Difference	Errors		Back	Add Mo	re	Save To	D ~
Quick Operations	s ^	\$15.00	\$0.00		\$0.00				0.00%	Invalid current		Filters				
Export Items Retails to	PIM	\$2.99	\$3.05	Direct Plus Fo	\$1.94		35.12%	36.39%	-36.39%	Invalid current	×	Valid (0)	all. The curr	ont rota	il is groa	tor than
Copy Upcoming PB Cha	anges to PIM									R		the max retail.	an. The curr	encreta	ii is grea	
Item Taxonomy Assign	ment															
Retail Change Managen	ment															
Settings	~	4									>					
											,					
		÷				1	L			-	*					

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.

DOCS & FILES DATA ENTRY	INVENTORY PRICE B	OOK CUSTOMERS VEND	DRS TRANSACTIONS REPOR	тѕ	workflows 🤊 🝞 🕼					
Price Book 🗸 ^	rice Book v ^ Retail Change Management: C00008									
Import Data Station 🐱	Selected for Import 📃 A	lways Imported 📃 Available for Impo	ort 🔄 Not Importable Change by: 🔘 Pe	rcent 💿 \$ Amount	2 item(s) selected					
Import PB from CR 🐱	ription Min Recommended Retail	Max Recommended Current Retail Retail	Actual GPM Max GPM Projected GPM	GPM Difference Errors	Select All Select None					
Quick Operations	t Buster \$0.0	\$9.99 \$9.99	54.45% 54.45%	0.00%	Back Add More Save To V					
Export Items Retails to PIM	Vave 34 \$0.0	\$0.00 \$0.00		0.00%	Filters					
Copy Upcoming PB Changes to PIM	Slush 4 \$0.0	00 \$1.69 \$1.69		0.00%	<ul> <li>Valid (4486)</li> <li>Invalid (1492)</li> </ul>					
Item Taxonomy Assignment	Cappuc \$0.0	00 \$2.69 <u>2.65</u> 🗘	36.43% 36.43%	0.00%						
Retail Change Management 🗸	t Buster \$0.0	00 \$2.09 \$2.09	65.07% 65.07%	0.00%						
	t Buster \$0.0	00 \$1.39 \$1.39	65.47% 65.47%	0.00%						
	1 Each \$0.0	\$0.00 \$0.00 \$0.00		0.00%						
	r Grill C \$0.0	00 \$1.99 \$1.99	41.71% 41.71%	0.00%						
	r Grill T \$0.0	00 \$2.39 \$2.39	30.96% 30.96%	0.00% ~						
	<			>						
	←	<b>1</b> 2 3 4	5 90	$\rightarrow$						

- 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.
  - o Location tags: Select the check boxes next to tags assigned to locations where new retail



## prices must be exported.

INVENT	ORY PRICE BOO	OK CUSTOMERS	S VENDC	RS TRA	NSACTIONS	REF	POR	TS		WORKFLOWS	อ	?	Ø
Retail (	Change Manager ted for Import 📃 Alw	ment: C00008 ays Imported 📃 Avail	able for Impo	rt 🔹 Not Im	portable Chan	ge by:	P	ercent 💿 \$ A	mount	4486 item(s) loaded 2 item(s) selected			
ription	Min Recommended Retail	Max Recommended Retail	Current Retail	Actual GPM	Max GPM	Projecte GPM	ed	GPM Difference	Errors	Select All Select None	ر ا د	Save Tr	
t Buster	\$0.01	\$9.99	\$9.99		54.45%	54.45%		0.00%	^			Save n	
Vave 34	\$0.00	\$0.00	\$0.00							Location     Location Tags			r F
Slush 4	\$0.00	\$1.69	\$1.69					C00008		Invalid (1492)			
Cappuc	\$0.00	\$2.69	\$2.65		36.43%	35.47%		C00016	ſm				
t Buster	\$0.00	\$2.09	\$2.09		65.07%	65.07%		C00026					
t Buster	\$0.00	\$1.39	\$1.39		65.47%	65.47%		C00035					
1 Each	\$0.00	\$0.00	\$0.00					C00045 C00058					
r Grill C	\$0.00	\$1.99	\$1.99		41.71%	41.719		C00068					
٢								C00084					
←		1	234	5 90					<b>→</b>				

## 5. Click Save To once again.

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

Price Book	~	Retail Change Mar	Retail Change Management: C00008							
Import Data Station	~	Selected for Import	Always Import	ed 📃 Available for In	nport 📃 Not Importab	le Change b	y: 🔘 Percent	\$ Amount	4 item(s) selected	
Import PB from CR	~	C00008[16576] 0 item(s) inserted, 4 item	(s) updated	C00009[16577 0 item(s) inserte	7] ed. 4 item(s) updated				Select All Select None	
Quick Operations	^		(-)		-, -, -, -, -, -, -, -, -, -, -, -, -, -				Back Add More Save To 🗸	
Export Items Retails to PIM									Filters	
Copy Upcoming PB Changes to	o PIM								Valid (8)	
Item Taxonomy Assignment		Export Errors Close							Invalid (2)	
Retail Change Management		GTIN	Description	Min Recommended Retail	Max Recommended Retail	Current Retail	Vendor	Negotiated Cost		
Settings	~	00070330600065	Bic Reg Chil	\$0.00	\$2.09	\$1.57	Wallace & Car	\$1.02		
		00070330000025	Bic Mini Chil	\$0.00	\$1.69	\$1.69	Wallace & Car	\$0.87		
		<b>00719410700010</b>	5 Hour Ener	\$0.00	\$4.50	\$4.00	Wallace & Car	\$2.92		
		<b>00719410500016</b>	5 Hour Ener	\$0.00	\$4.00	\$3.50	Wallace & Car	\$2.48		
		<						···· > *		
		←			1			$\rightarrow$		

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:

- o Location name
- o Item UPC
- o 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.

	E		GTIN					2870 103-CN 🗸 🔅
DOCS & FILES DATA ENTRY	INVENTORY PRICE BOOK CUSTOM		UPC-A UPC-E	TRANSACTIO	ONS	REPORTS		workflows 🤊 🕜 📝
Price Book × Import Data Station ×	Retail Change Management: C0000	: • •	EAN8 EAN13 Description	Not Importable	Change b	y: 🔘 Percent	\$ Amount	8 filtered of total 10 item(s) loaded Select All Select None
Import PB from CR 🗸	GTIN V Description Min Re Retail	ex 🔳	Min Recommended Retail	mmended Cu Re	urrent etail	Vendor	Negotiated Cost	Back Add More Save To V
Quick Operations         ^           Export Items Retails to PIM	00070330600065         2 ↓ Sort Ascending           00070330000025         X↓ Sort Descending		Max Recommended Retail	\$2.09	\$1.57	Wallace & Car Wallace & Car	\$1.02	Filters Valid (8)
Copy Upcoming PB Changes to PIM Item Taxonomy Assignment	00719410700010		Current Retail Vendor	\$4.50	\$4.00	Wallace & Car	\$2.92	Invalid (2)
Retail Change Management	00719410500016	-	Negotiated	\$4.00	\$3.50	Wallace & Car	\$2.48	
Settings 🗸	00719410800017 5 Hour Ener		Cost	\$0.00	\$0.00		\$0.00	
	00025900000554 Swisher Swe		Category	\$0.00	\$0.00		\$0.00	
	00070622431018 Goetze's Va		Actual GPM	\$0.60	\$0.60	Wallace & Car	\$0.32	
	00719410200015 5 Hour Ener		Projected GPM	\$0.00	\$0.00		\$0.00	
	< ~		GPM Difference Errors				> →	

# **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
		Item code in one of supported formats:
	Voc	- UPCA
SKU		- UPCE
Site		- EAN8
		- EAN13
		- PLU
		Code type for the SKU code in the previous column. Must
		be one of following numbers:
		- UPCA = 0
SKU Type	Yes	- UPCE = 1
		- EAN8 = 2
		- EAN13 = 3
		- PLU = 4
	No	Item name as it appears in the C-Store Office Price Book.
Description	Yes, if CR Description is not available	Must be no longer than 250 characters. The field is
		required if the CR Description value is not provided for the
		item.
	No	Item name that will appear on the cash register and in cus-
CR Description	Yes, if Description is not avail	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 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)
Language	Yes	- 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	<b>CR</b> 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.

Price Book	~	Import Item Na	me Translations				From file	
Import Data Station	~							oad Data Source
Import PB from CR	~	Selected for Import	Always Imported	Available for Import	Not Importable	≛ 2		
Quick Operations	^	GTIN	Description	CR Description	Language		From file:	Browse
Export Items Retails to PIM								ampie
Copy Upcoming PB Changes to F	PIM							
Item Taxonomy Assignment								
Retail Change Management								
Import Fuel from Cash Register								
Import Item Name Translations								
Settings	~							
		< > Items per	r page: 50 🗡				< Back	

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.

 $\Omega$ 

Price Book	~	Import Item Nar	ne Translations					From file
Import Data Station	~							Load Data Source
Import PB from CR	~	Selected for Import	Always Imported	Available for Import	Not Importable	. گ	2	
Quick Operations	^	GTIN	Description	CR Description	Language			From file:
Export Items Retails to PIM								Download Example
Copy Upcoming PB Changes to	PIM							
Item Taxonomy Assignment								
Retail Change Management								
Import Fuel from Cash Register								
Import Item Name Translations	5							
Settings	~							
		< > Items per	page: 50 ~					< Back

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.

Price Book ~	Import Item Name Translations	6 items in draft
Import Data Station		Select All Select None Remove All
Import PB from CR 🛛 🗸	Selected for Import Always Imported Available for Import Not Importable	Add More Save To
Quick Operations	GTIN Description CR Description Language	
Export Items Retails to PIM	126571 Strawberry donut Str. donut I English	Filters
Copy Upcoming PB Changes to PIM	126571 Beignets de fraises Beignets de fraises Français	Invalid (0)
Item Taxonomy Assignment	126571 Donut de fresa Donut de fresa Español	
Import Fuel from Cash Register	126588 Chocolate donut Ch. Donut English	
Import Item Name Translations	126588     Beignet de chocolat     Beignet de ch.     Français	
Settings v	126588     Donut de chocolate     Donut de ch.     Español	
	C 1 > Items per page: 50 v	

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**.

Price Book ~	Import Item Name Translations	6 items in draft
Import Data Station V		6 items selected
Import PB from CR 🛛 🗸	Selected for Import Always Imported Available for Import Not Importable	Select All Select None Remove All
Quick Operations	GTIN Description CR Description Language	Add More Save To
Export Items Retails to PIM	126571 Strawberry donut Str. donut English	Filters
Copy Upcoming PB Changes to PIM	126571 Beignets de fraises Beignets de fraises Français	Valid (6)
Item Taxonomy Assignment	126571 Donut de fresa Donut de fresa Español	Invalid (0)
Import Fuel from Cash Register	✓ 126588 Chocolate donut Ch. Donut English	
Import Item Name Translations	✓ 126588 Beignet de chocolat Beignet de ch. Français	
Settings v	✓ 126588 Donut de chocolate Donut de ch. Español	
	Image: Compare the set of the se	

*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.

Price Book ~	Import Item Name Translations	6 items in draft		
Import Data Station	The export process was successfully completed	6 items selected		
Quick Operations	6 items completed 0 items failed	Add More Save To		
Export Items Retails to PIM	6 items total	Filters		
Copy Upcoming PB Changes to PIM Item Taxonomy Assignment	Close	✓ Valid (6)		
Retail Change Management	Selected for Import Always Imported Available for Import Not Importable			
Import Fuel from Cash Register	GTIN CR Description CR Description Language			
Import Item Name Translations	✓ 126571 Strawberry donut Str. donut English			
Settings ~	☑ 126571 Beignets de fraises Beignets de fraises Français			
	✓ 126571 Donut de fresa Donut de fresa Español			
	$\checkmark$ 1 $>$ Items per page: 50 $\times$			

## **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.

Price Book ~	Import Item Na	me Translations	3 items filtered of total 6 items in draft
Import Data Station 🛛 👻			Select All Select None Remove All
Import PB from CR v	Selected for Import	Always Imported         Available for Import         Not Importable	Add More Save To
Quick Operations	GTIN 🔺	Description CR Description Language	
Export Items Retails to PIM	126571	2↓ Sort Ascending r. donut English	Filters
Copy Upcoming PB Changes to PIM	126571	Sort Descending signets de fraises Français	Invalid (0)
Item Taxonomy Assignment	126571	Columns	GTIN : 12657
Import Fuel from Cash Register		Filters 1265/	
Import Item Name Translations		Courns for import	
Settinas v			
	< 1 > It	ms per page: 50 ~	

## **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.

		ΞE					88 Gu	əst 🗸	🔅 J. 8	Smith
≡							WORKFLOWS	ত	0	Ø
Pri Cate	ce book egories	Welcome to	Product Dat	a Manageme	ent	t!	2. Click th	e Histo	ry Log	icon
Dep	partments	1. Select the Price Book		Result: History Log opens at		Log				Close
Iten	ns	element, for example, Items		the Items level.		Today 05/31	/2018			
Prio	e Groups					08:16 AM \ J.Sr	nith			
Pror	mo Groups					Items Gene 3 items undat	ral			
Pror	motions					5 items upua	ieu 🔖			
Iten	n Tags					08:15 AM \ J. S Items List	mith			
Ven	dors					3 items updat	ted			
Qu	ick Operations					08:14 AM \ J.Sn Items List 3 items updat	nith ted			
Imp	oort Price Book from CR					08:14 AM \ J.Sr Items List 3 items updat	nith ted			

#### 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.

		E			88 Gues	t v	🕸 J. S	imith				
=							v	VORKFLOWS	୭	0	Ø	
Price	e book	Promo Gro	oups (PB_PromoGrou	ups)		Log		2. Click the	Histor	y Log i	icon	
Categ	ories	Selected to	Export 📕 Always Exported	Available to Export Non	Exportable	🛓 Toda	<b>y</b> 05/31/20	018				
Departments Items		Promo Group # Name I B&H		Source	Add to Items Groups Reconciliation	01:05 • PB_	01:05 PM \ J. Smith • PB_PromoGroups					
				Account: Guest		1 pro	mogroup a	oup deleted				
Price	Groups	s		Account: Guest	Account: Guest Result: History Log opens at		Ol:04 PM \ J. Smith     Account: Guest     PB_PromoGroups					
Prom	otions			Account: Guest	level.	3 pro prom						
Item	Tags	5	CAPRI	Account: Guest		01:04 PM \ J. Smith						
Vendo	ors	7	DORAL	Account: Guest		Account: Guest     PB_PromoGroups						
Quio	k Operations	8	L&M	Account: Guest	unt: Guest 3 promo		3 promogroups inserted and 5 promogroups updated					
Impo	rt Price Book from CR	9	GPC	Account: Guest		01:04	PM \ J. Smit	h +				
Settings		18	Camel Turkish Blnd	Account: Guest		PB_PromoGroups     promogroups inserted						
Tax r	ates											
Draf	ts											
PB_P	C +	2. In the li	st of available drafts, elect a draft.									

# **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.

Price book	Location:	Orange
Categories	Tax 1:	3
Departments	Tax 2:	0
Items	Tax 3:	0
Price Groups	Tax 4:	0
Promo Groups		Reimport taxes Update
Promotions		
Item Tags		
Vendors		
Quick Operations Import Price Book from CR		
Settings		
Tax rates		

(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.

Price Book	^	
Categories		Welcome to Product Data Management!
Departments		
Items		
Price Groups		
Promo Groups		
Promotions		
Item Tags		
Drafts		
C	a +	
Items_Global 🔗	<b>X</b>	
Items_Draft		

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:

- 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.

Price Book	^	
Categories		Welcome to Product Data Management!
Departments		
Items		
Price Groups		
Promo Groups		
Promotions		
Item Tags		
Drafts		
New_Draft	<ul><li>✓ ×</li></ul>	

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

Price Book	Items (New_Draft)	0 item(s) in draft
Categories		Select All Select None Remove All
Departments	Selected for Import Always Imported Available for Import Not Importable	
Items		Save to -
Price Groups	GTIN Child UPC-A UPC-E PLU Image Source Description	Filters
Promo Groups		Valid (0)
Promotions		Invalid (0)
Item Tags		
Drafts		
Q +		
New_Draft		
Items_Global		
Items_Draft		
	C Items per page: 50 V	

#### 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.

Price Book	^	
Categories		Welcome to Product Data Management!
Departments		
Items		
Price Groups		
Promo Groups		
Promotions		
Item Tags		
Drafts		
Items	Q +	
Items_Global		
Items_Draft		



#### **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.

Price Book	^	
Categories		Welcome to Product Data Management!
Departments		
Items		
Price Groups		
Promo Groups		
Promotions		
Item Tags		
Drafts		
	+	
Items_Global	🖋 🗙 👁	
Items_Draft		

#### **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.

Price Book	^	
Categories		Welcome to Product Data Management!
Departments		
Items		
Price Groups		
Promo Groups		
Promotions		
Item Tags		
Drafts		
	<u> </u>	
Items_Global	# X 👁	
Items_Draft		

## 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.

Price Book	^	It	ems (Items_Dra	ft)						20 item(s) in draft
Categories										4 item(s) selected
Departments		Se	elected for Import	Always Imp	oorted Availa	able for Import	Not Importable		± 2	Select All Select None Remove All
Items				Child					CP	Add More Save To 🗡
Price Groups			GTIN	in parent	UPC-A	UPC-E	Source	Description	Description	
Promo Groups			00028200003843	N/A	028200003843	02838423	Account: Grey	MARLBORO G	Marl Gld Box	Filters
Promotions		•	00028200003577	N/A	028200003577	02835727	Account: Grey	MARLBORO R	Marl Red Box	<ul><li>✓ Valid (20)</li><li>☐ Invalid (0)</li></ul>
Drafts			00026100005752	N/A	026100005752	02657512	Account: Grey	NEWPORT MT	Newport Box	
	<b>a +</b>		00012000001314	N/A	012000001314	01213104	Account: Grey	20 OZ	MT DEW 20	
Items_Draft			00026100005738	N/A	026100005738	02657318	Account: Grey	NEWPORT MT	Newport 100	
			00070847811169	N/A	070847811169	00000000	Account: Grey	ENGERY D	MONSTER ENER	
			00049000000443	N/A	049000000443	04904403	Account: Grey	COKE CLSC 20	COKE CLSC 20	
		<	1 > Items	per page:	50 ~					

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.

Price Book Categories	^	Ι	tems (Items_Dr	aft)	20 item(s) in draft					
Departments		5	elected for Import	Always Ir	Select All Select None Remove All					
Items				Child					CR	Add More Save To 🗡
Price Groups			GTIN	in parent	UPC-A	UPC-E	Source	Description	Description	
Promo Groups			00028200003843	N/A			×	MARLBORO G	Marl Gld Box	Filters
Promotions		2	00028200003577	N/A	Apply c	hanges for 4 select	ed items?	MARLBORO R	Marl Red Box	Valid (20)
Drafts			00026100005752	N/A	7	Vec Ne		NEWPORT MT	Newport Box	
Q	÷		00012000001314	N/A	012000001314	01213104	Account: Grey	20 OZ	MT DEW 20	
Items_Draft			00026100005738	N/A	026100005738	02657318	Account: Grey	NEWPORT MT	Newport 100	
			00070847811169	N/A	070847811169	00000000	Account: Grey	ENGERY D	MONSTER ENER	
			00049000000443	N/A	049000000443	04904403	Account: Grey	COKE CLSC 20	COKE CLSC 20	
			1 > Iten	ns per page						

### 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.
- 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.

DOCS & FILES	DATA ENTRY	INVENTORY P	RICE BOOK	CUSTOMER	S VENDORS	;	TRANSA	CTIONS R	EPORTS		WORKFLOWS 🄊 🝞 📝			
Price Book Categories	^	Items (Buffer)	)	GTIN Child in parent UPC-A						Account Price Book 20 item(s) loaded				
Departments		Selected for Import	Selected for Import Always Imported A				Not Impor	table			5 item(s) selected			
Price Groups		GTIN	Child in parent	UPC-A	PLU EAN8	Þ		Source	Description	CR Descriptio	Select All Select None Remove All			
Promo Groups		000282000038	843 2↓ Sort Asc	cending	EAN13			Account: Gr	MARLBORO	Marl Gld Bo				
Promotions Item Tags		00028200003	577	scending	Image Source	Þ		Account: Gr	MARLBORO	Marl Red Bc	Filters Valid (20)			
Drafts		00026100005	752 Filters	•	Description			Account: Gr	NEWPORT M	Newport Bo				
	<u>م</u> +	000120000013	314 Solumns	s for import	CR Description			Account: Gr	20 OZ	MT DEW 20				
Items_Draft		000261000057	738 N/A	0261000057	Measure type			Account: Gr	NEWPORT M	Newport 10				
		00070847811	169 N/A	0708478111	Length	Þ		Account: Gr	ENGERY D	MONSTER E				
		000490000004	143 N/A	049000004	Width	Þ		Account: Gr	COKE CLSC	COKE CLSC				
		< 1 >	Items per page:	<u>50 ~</u>	Height	A A					< Back			

- 3. For each selected column, select one of the following exporting conditions:
  - o If greater than existing value (for the Retail column only)
  - o 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.

DOCS & FILES	DATA ENTRY	INVENTORY PRICE BOOK CUSTOMERS VENDORS TRANSACTIONS REPORTS	workflows 🍤 😗 🗹
Price Book	^	Items (Buffer)	Account Price Book
Departments		Selected for Import Always Imported A UPC-A Vot Importable	20 item(s) loaded 5 item(s) selected
Items Price Groups		□ GTIN Child in parent UPC-A VPLU ► Source Description	on CR Descriptio
Promo Groups Promotions		☑         00028200003843         2↓ Sort Ascending         ☑         EN113         Account: Gr         MARLBOI           ☑         00028200003843         2↓ Sort Ascending         ☑         Image         ▲	RO Mari Gid Bo Filters
Item Tags Drafts		OU02220003577     Columns     Source     Account: Gr NEWPOR     Account: Gr NEWPOR	T. M Newport Bo
Hama Darft	<u>م</u> +	☑         0001200001314         ☑         CR Description         Account: Gr 20 OZ           ☑         00012000001314         ☑         Size         ▶	MT DEW 20
Items_Drait		Choose condition     N/A 0708478111     Length     Choose condition     If different than existing value     Y	D MONSTER E
		00049000000443 N/A 0490000004     Width → If disting value is empty     Z Always import	SC COKE CLSC
		Retail	

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.



	EOFFICE				<b>~</b>	GTIN				46 Gr	eyhound 🗸	∲ J.	Smith
DOCS & FILES DA	ATA ENTRY	INVENTORY	PRICE BOOK	CUSTOME	~	Child in parent	TRANSACTIO	ONS REPOR	WORKFLO	ows 🤊	8	đ	
					~	UPC-A							
Price Book	^	Items (Items	s_Draft)		~	UPC-E				20 itom(c) in dr	əft		
Categories						PLU				Soloct All Solo	at Nono P	omovo	A II
Departments		Selected for Impor	rt Always Imp	orted A		EAN8	Not Importable		± 2	<u>Select All</u> <u>Sele</u>		eniove /	<u>-xu</u>
Items	_					EAN13				Add More	Save To	·	
Div C		GTIN	Child	UPC-A		Image	ource	Description	CR				
Price Groups			in parent		~	Source			Description	Filters			
Promo Groups		0002820000	03843 2↓ Sort Asc	ending	~	Description	Account: Grey	MARLBORO G	Marl Gld Box	Valid (20)			
Promotions		0002820000	3577 X↓ Sort De	scending	~	CR	Account: Grey	MARI BORO R	Mari Red Box	Invalid (0)			
Item Tags			Column	s 🕨		Description	iccount: orey						
Drafts		0002610000	)5752		~	Size	Account: Grey	NEWPORT MT	Newport Box				
	Q +	0001200000	01314		~	Measure type	Account: Grey	20 OZ	MT DEW 20				
Hama Draft		-	Column	s for import	~	Length	Annual Control	NEWDODT NT	November 100				
Items_Draft		0002610000	15738 N/A	0261000057	~	Width	Account: Grey	NEWPORT MT	Newport 100				
		0007084781	11169 N/A	0708478111	~	Height	Account: Grey	ENGERY D	MONSTER ENER				
		0004900000	00443 N/A	0490000004	~	Retail	Account: Grey	COKE CLSC 20	COKE CLSC 20				
		< 1 >	Items per page:	50 ×	~	Recommended Retail							

#### **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.

Price Book	Items (Items_Draft) 10 filtered of total 20 item(s) in draft
Departments	Selected for Import Always Imported Available for Import Not Importable
Items	
Price Groups	in parent of the source bescription Description Filters
Promo Groups	00028200003843 N/A 028200003843     24 Sort Ascending Int: Grey MARLBORO G Marl Gld Box Valid (20)     Invalid (0)
Item Tags	00028200003577 N/A 028200003577     N/A 028200003577     N/A 028200003577     Rescending     Int: Grey MARLBORD R Marl Red Box     UPC-A: 02
Drafts	□ 00026100005752 N/A 02610005757 ■ Counting P to the second sec
Q +	□ 00026100005738 N/A 026100005738 Columns for import Int: Grey NEWPORT MT Newport 100
Items_Draft	00028200004222 N/A 028200004222 02842222 Account: Grey MARLBORO S Marl Sp BI G
	00025900227265         N/A         025900227265         00000000         Account: Grey         SWISHER SW         SWISHER SWEE
	O0028200004659 N/A 028200004659 02846529 Account: Grey MARLBORO G Marl Gld 100
	< 1 Definition of the second s

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.
- 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.

Price Book	^	Items (Items_Dra	tems (Items_Draft) 4 filtered of total 20 item(s) in draft										
Categories					Select All Select	t None Remove All							
Departments		Selected for Import	Add More	Save To									
Items					CR		Unite		~				
Price Groups		UPC-E	Source	Description	Description	Size	in Case	Cost		Filters			
Promo Groups		02838423	Account: Grey	MARLBORO G	Marl Gld Box			\$9.00	₽↓	Sort Ascending			
Promotions		02835727	Account: Grev	MARLBORO R	Marl Red Box			\$9.00	Z↓ A↓	Sort Descending			
Item Tags		00000000		NEWBOOK				***		Columns 🕨			
Drafts		02657512	Account: Grey	NEWPORT MT	Newport Box			\$9.00		Filters	From Enter Number 🗘		
	_ <b>Q</b> +	04904403	Account: Grey	COKE CLSC 20	COKE CLSC 20	20.00000		\$5.00		Columns for import	то 10 🗘		
Items_Draft											= Enter Number 🗘		
		-	_										
		1 > Items	per page: 50	~									

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.

Price Book	Items (I	tems_Draft)	)		10 filtered of total 20 item(s) in draft					
Categories			Select All Select None Remove All							
Departments	Selected for	Import Al	Always Imported Available for Import Not Importable					± 2	Add More Save To 🗡	
Items	GTIN	c	Child	LIPC-A	UPC-F	PLU	Image	Source	Description	
Price Groups		1	in parent				Intege		beenpaon	Filters
Promo Groups	00028	3200003843	N/A	028200003843	02838423			Account: Grey	MARLBOR	Valid (20)
Promotions	00028	3200003577	N/A	028200003577	02835727			Account: Grey	MARLBOR	UPC-A : 02
Item Tags	00026	5100005752	N/A	026100005752	02657512			Account: Grey	NEWPOR1	
Q +	00026	5100005738	N/A	026100005738	02657318			Account: Grey	NEWPOR1	
Items_Draft	00028	3200004222	N/A	028200004222	02842222			Account: Grey	MARLBOR	
	00025	5900227265	N/A	025900227265	00000000			Account: Grey	SWISHER	
	00028	3200004659	N/A	028200004659	02846529			Account: Grey	MARLBOR	
	< 1	> Items p	er page:	50 ×						

#### **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.

Price Book	^	Items (Item	s_Draft)					20 item(s) in draft	
Categories				3 item(s) selected					
Departments		Selected for Impo	ort Alw	ays Imported	Available for Impo	Not Importable	2	Select All Select None Remove All	
Items		Taxes				Product Code		Add More Save To 🗸	
Price Groups		Та	x 2	Tax 3	Tax 4	Product Code default Product from Department Code			
Promo Groups								× Filters	
Promotions								Valid (20)	
Item Tags		_				×			
Drafts				?	Remove 3 sele	cted items?		<u>^</u>	
	q. +			Y				×	
Items_Draft					Yes	No		×	
								×	
								×	
		< 1 >	Items pe	r page: 50 ~					

#### 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.

Price Book	1	items (Items_Dra	ift)	19 item(s) in draft						
Categories									_	4 item(s) selected
Departments		Selected for Import	Select All Select None Remove All							
Items	11									Add More Save To Y
Price Groups		] GTIN	in parent	UPC-A	UPC-E	PLU	Image	Source	Description	
Promo Groups		00028200003843	N/A	028200003843	02838423			Account: Grey	MARLBOR	Filters
Promotions Item Tags		00026100005752	N/A	026100005752	02657512			Account: Grey	NEWPORT	Valid (19)
Drafts		00012000001314	N/A	012000001314	01213104			Account: Grey	20 OZ	
Q <b>+</b>		00026100005738	N/A	026100005738	02657318			Account: Grey	NEWPOR1	
Items_Draft		00070847811169	N/A	070847811169	00000000			Account: Grey	ENGERY [	
		00049000000443	N/A	049000000443	04904403			Account: Grey	COKE CLS	
		00028200004222	N/A	028200004222	02842222			Account: Grey	MARLBOR	
		1 > Item	s per page:	50 ~						

#### **OPENING THE DRAFT IN THE FULL SCREEN MODE**

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

Price Book	^	It	ems (Items_Dra	ft)		19 item(s) in draft							
Categories										_	4 item(s) selected		
Departments		Se	elected for Import	Always Imp	Availa	Available for Import Not Importable					Select All Select None Remove All		
Items											Add More Save To 🗸		
Price Groups			GTIN	in parent	UPC-A	UPC-E	PLU	Image	Source	Description			
Promo Groups			00028200003843	N/A	028200003843	02838423			Account: Grey	MARLBOR	Filters		
Promotions			00026100005752	N/A	026100005752	02657512			Account: Grey	NEWPORT	<ul> <li>Valid (19)</li> <li>Invalid (0)</li> </ul>		
Drafts			00012000001314	N/A	012000001314	01213104			Account: Grey	20 OZ			
Q	+		00026100005738	N/A	026100005738	02657318			Account: Grey	NEWPORT			
Items_Draft			00070847811169	N/A	070847811169	00000000			Account: Grey	ENGERY [			
			00049000000443	N/A	049000000443	04904403			Account: Grey	COKE CLS			
			00028200004222	N/A	028200004222	02842222			Account: Grey	MARLBOR			
		<	1 > Item	s per page:	50 ~								

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.

Price Book	^	Please select data source on the right to load items from.	Account Price Boo	ĸ	
Categories				Load Data	Sour
Departments				Loud Data	
Items			Item(s) to load:	20	Ŷ
Price Groups			Manufacturer:	Type to search	
Promo Groups			Vendor:	Type to search	~
Promotions			Location Price Boo	ok	
Item Tags			Location Cash Res	gister	
Drafts			GateKeeper		
	_ <b>Q</b> +		Drafts		
Items_Global			Handheld		
Items_Draft			From file		
			< Back		



## **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.

Price Book ^	Items (Buf	fer)							Account Price Book
Categories	<u> </u>								20. item(s) loaded
Departments	Selected for Im	port Always Im	ported Ava	orted Available for Import Not Importable					Select All Select None Remove All
Items		Child							Shue To X
Price Groups	GTIN	in parent	UPC-A	UPC-E	PLU	Source	Description	CR Descriptio	Jave TO
Promo Groups	0002820	0003843 N/A	0282000038	02838423		Account: Gr	MARLBORO	Marl Gld Bo	Filters
Promotions Item Tags	0002820	0003577 N/A	0282000035	02835727		Account: Gr	MARLBORO	Marl Red Bc	<ul><li>✓ Valid (20)</li><li>☐ Invalid (0)</li></ul>
Drafts	0002610	0005752 N/A	0261000057	02657512		Account: Gr	NEWPORT M	Newport Bo	
Q +	0001200	0001314 N/A	0120000013	01213104		Account: Gr	20 OZ	MT DEW 20	
Items_Global	0002610	0005738 N/A	0261000057	02657318		Account: Gr	NEWPORT M	Newport 10	
Items_Draft	0007084	7811169 N/A	0708478111	00000000		Account: Gr	ENGERY D	MONSTER E	
	0004900	0000443 N/A	0490000004	04904403		Account: Gr	COKE CLSC	COKE CLSC	
	< 1	> Items per page:	<u>50 ~</u>						< Back

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.

Price Book	Items (Buffer)	Account Price Book
Categories		20 item(s) loaded
Departments	Selected for Import Always Imported Available for Import Not Importable	10 item(s) selected
Items	Child	Select All Select None Remove All
Price Groups	GTIN UPC-A UPC-E PLU Source Description CR Description	Save To Y
Promo Groups	☑ 00028200003843 N/A 0282000038 02838423 Account: Gr MARLBORO Marl Gld B	Filhere
Promotions	✓ 00028200003577 N/A 0282000035 02835727 Account: Gr MARLBORO Marl Red E	
Item Tags		Invalid (0)
Drafts		
Q <b>+</b>	☑ 00012000001314 N/A 0120000013 01213104 Account: Gr 20 OZ MT DEW 2	0
Items_Global	☑ 00026100005738 N/A 0261000057 02657318 Account: Gr NEWPORT M Newport 1	D.
Items_Draft	O0070847811169 N/A 0708478111 00000000 Account: Gr ENGERY D MONSTER	E
	☑ 00049000000443 N/A 0490000004 04904403 Account: Gr COKE CLSC COKE CLSC	
	✓ 1 >> Items per page: 50 ×	< Back

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

(i)

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 <u>Setting Up Exporting Columns and</u> <u>Conditions</u>.

To export the data from a draft to a file:

- 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.

Price Book ^	Items (Items_Dr	aft)	19 item(s) in draft					
Categories		1		No. Townshields				4 item(s) selected
Departments	Selected for Import	Always Imported Avai	lable for Import	Not Importable			- ×	Select All Select None Remove All
Items		Child						Add More Save To 🗸
Price Groups	GTIN	in parent UPC-A	UPC-E	PLU	Image	Source	Description	
Promo Groups	00028200003843	N/A 028200003843	02838423			Account: Grey	MARLBOR	Filters
Promotions Item Tags	✓ 00026100005752	N/A 026100005752	02657512			Account: Grey	NEWPOR1	Invalid (0)
Drafts	00012000001314	N/A 012000001314	01213104			Account: Grey	20 OZ	
Q <b>+</b>	<b>O0026100005738</b>	N/A 026100005738	02657318			Account: Grey	NEWPORT	
Items_Draft	00070847811169	N/A 070847811169	0000000			Account: Grey	ENGERY [	
	0004900000443	N/A 04900000443	04904403			Account: Grey	COKE CLS	
	00028200004222	N/A 028200004222	02842222			Account: Grey	MARLBOR	
	< 1 > Iter	ns per page: 50 ×						

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.

(i) 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 <u>Setting Up Exporting Columns and</u> Conditions.

To export the data from a draft to a location:

- 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.



Price Book ^	Items (Buffer)	Account Price Book
Departments	Selected for Import Always Imported Available for Import Not Importable 🏂 🧳	20 item(s) loaded
Items		10 item(s) selected <u>Select All</u> <u>Select None</u> <u>Remove All</u>
Price Groups	GTIN Grind UPC-A UPC-E PLU Source Description CR Descriptio	Save To \vee
Promo Groups	Image: Output State         N/A         028200003843         N/A         0282000038         02838423         Export condition: Always import         Mari Gld Bo	Filters
Item Tags	O0028200003577         N/A         0282000035         02835727         Account: Gr         MARLBORD         Marl Red Bc	Valid (20)
Drafts	O0026100005752         N/A         0261000057         02657512         Account: Gr         NEWPORT M         Newport Bo	Invalid (0)
Q +	✓ 00012000001314 N/A 0120000013 01213104 Account: Gr 20 OZ MT DEW 20	
Items_Global	✓ 00026100005738 N/A 0261000057 02657318 Account: Gr NEWPORT M Newport 10	
Items_Draft	✓ 00070847811169 N/A 0708478111 00000000 Account: Gr ENGERY D MONSTER €	
	2004900000043     N/A     049000004     04904403     Account: Gr     COKE CLSC     COKE CLSC     T     T     Tems per page:     50      *	< Back

- 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.

Price Book ^	Items (Items_Global)	item(s) in draft
Categories	Highway	
Departments	Selected for Import Always Imported Available for Import Not Importable	Location
Items	City neighborhood	Location Tags
Price Groups	GTIN Child UPC-A UPC-E PLU Image Suburban	
Promo Groups	□ 00028200003843 N/A 0282000038 02838423	ters
Promotions	✓ 00028200003577 N/A 0282000035 02835727	Valid (10) Invalid (0)
Item Tags	✓ 00026100005752 N/A 0261000057 02657512	intelle (e)
Drafts	Property type	
Q <b>+</b>	✓ 00012000001314 N/A 0120000013 01213104	
Items_Global	✓         00026100005738         N/A         0261000057         02657318	
Items_Draft	00070847811169 N/A 0708478111 00000000 Trype	
	□ 00049000000443 N/A 049000004 04904403	
	【         1         >         Items per page:         50         ✓	

- 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.
- (Optional) In the mapping table, adjust taxonomy settings, if needed. For more details, see Monitoring and Adjusting Taxonomy Settings.



## 8. Click **OK**.

choose "Update by empty values will n choose "Update by empty value values by empty from the corr	es" rule to replace existing esponding fields of the draft.	Skip empty values Jpdate by empty values
Items will be updated by next conc	litions:	
GTIN - Always export Child in parent - Always export UPC-A - Always export UPC-E - Always export EANS - Always export EANS - Always export EANS - Always export Description - Always export CR Description - Always export Source - Always export CR Description - Always export Size - Always export CR Description - Always export Size - Always export Height - Always export Height - Always export Retail - If existing value is empty Recommended Retail - If existing value is empty Max Recommended Retail - If	Units in Case - Always export VIN - Always export Cost - Always export Apply Negotiated Cost - Always export Apply Negotiated Cost to - Always export Apply Negotiated Cost Or VIEme - Always export Parent UPC - Always export Child UPC - Always export Price Group - Always export Manufacturer - Always export Trusted - Popularity - Min Stock - Always export Inactive On Station - Always expot Lactor On Station - Always export	Lottery State - Always export Wash Expiry In Days - Always export Car Wash Controller Code - Always export Wash Type - Always export Wash Package Code - Always export Tax Default from Department - Always export Tax 1 - Always export Tax 2 - Always export Tax 3 - Always export Tax 4 - Always export Tax 4 - Always export Product Code - Always export Product Code - Always export Errors -

## EXPORTING OTHER PRICE BOOK ELEMENTS

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

Price Book	Ite	ems (Items_Glo	bal)								10 it	tem(s) in draft	
Categories											4.1	/ 、	_
Departments	Se	ected for Import	Always Imp	Ava Ava	ilable for Import	Not Impo	rtable					<ul> <li>Location</li> </ul>	Þ
Items									-	_	[	Location Tags	×.
Drine Creume		GTIN	Child	UPC-A	UPC-E	PLU	Image	Source		Banksville	d	d More Save To Y	
Price Groups			in parent							Bilmar Building			
Promo Groups		00012000001314	N/A	0120000013	01213104			Accoun		Braddock Shell	t	ers	
Promotions		00026100005738	N/A	0261000057	02657318			Accoun		Centre		Valid (10)	
Item Tags	- 0	00070847811169	N/A	0708478111	00000000			Accourt		Cochran		Invalid (0)	
Drafts										Craft			
Q +		00049000000443	N/A	0490000004	04904403			Accoun		DC 401 NAS			
Items_Global		00028200004222	N/A	0282000042	02842222			Accourt		Erie Sunoco			
Items_Draft		00611269818994	N/A	6112698189	00000000			Accoun	nt: Gr	KEU DULL I I			
		00611269991000	N/A	6112699910	00000000			Account	nt: Gr	RED BULL E I			



# **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



(i)

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.

om.	Account Price Book		
		Load	Data Source
	Items to load:	148566	÷
	Manufacturer:	search	
	Vendor:	search	~
	Department:	search	~
	Category:	search	~
	Price Group:	search	~
	Promo Group:	search	~
	Active Data:	<b>v</b>	

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

Account Pric	e Book	
		Load Data Source
Tag:	Size	~

Please select data source on the right to load items f

- 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.

Account Price Boo	k	
	Load Da	ata Source
Items to load:	2863	Ŷ
Name:		
Туре:	search	~
Country:	search	~
State:	search	~
Import vendor items:		
Active data:	<b>v</b>	

- (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.

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



- o 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.

Location		
	Load D	ata Source
Items to load:	28	Ĵ
Location:	Orange	~
Name:		
Туре:	search	~
Country:	search	~
State:	search	~
Import vendor items:		
Active data:	<b>v</b>	

- (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.

Location		
	Load Da	ata Source
Promotions to load:	0	Ŷ
Location:	Orange	~
Name:		
Active:	<b>v</b>	
Active From:		~
Active To:		~
Туре:	search	~

(i)

## **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:
  - o Location- start typing the location's name or select one or several locations from the list.
  - o 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.
- o Manufacturer start typing the manufacturer's name and then select it from the list.
- o Department start typing the department's name or select one or several departments from the list.
- o 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.



Please

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

select data source on the right to load items from.	Account Price Boo	k	
	Location Price Boo	ok	
		Load D	ata Source
	Location:	Orange	× *
	Items to load:	3163	÷
	Vendor:	search	~
	Manufacturer:	search	
	Department:	search	~
	Category:	search	~
	Price Group:	search	~
	Promo Group:	search	~ -

#### **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.

- o 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.

Please select data source on the right to load items from.	Account Price Book	t i i		
	Location Price Book	k		
	Location Cash Regi	ister		
	GateKeeper			
			Load Data Source	
	Items to load:	100	Ŷ	•
	Popularity group:	select	~	
	Trusted index:	select	~	
	Category:	search	~	
	Price Group:	search	~	
	Promo Group:	search	~	
	Department:	search	~	
	Manufacturer:	search		-



## **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:

o 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.

o Drafts - select the draft saved and shared by another user.



You can view the drafts shared by system users only

- o My drafts select this option to display your own saved drafts in the Drafts list.
- 4. Click the Load Data Source button.

Please select data source on the right to load items from.	Account Price Book	K	
	Location Price Boo	k	
	Location Cash Reg	ister	
	GateKeeper		
	Drafts		
		Load Da	ata Source
	Items to load:	100	<b>^</b>
	Drafts:	Cigarettes	~
	My drafts:		

### **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.
  - o Items to load displays the number of items to be uploaded to the buffer.

(i) 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.
- o Files select one or several stored files from the list of available files.



Please select data se

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.

purce on the right to load items from.	Account Price Book	¢.	
	Location Price Boo	k	
	Location Cash Reg	ister	
	GateKeeper		
	Drafts		
	Handheld		
			Load Data Source
	Items to load:	0	<b>^</b>
	Location:	Cochran	~
	Files:	search	~
11/29/2017	NewItems-11-29-201	7-214715.x	ml.parsed (1)
11/29/2017	NewItems-11-29-201	7-214511.x	ml.parsed (1)
10/05/2017	NewItems-10-05-201	7-164111.x	ml.parsed (1)

## **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.
- 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:

(i)

- 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.

Please select data source on the right to load items from.	Account Price Book		
	Location Price Book		
	Location Cash Regis	ster	
	GateKeeper		
	Drafts		
	Handheld		
	From File		
		Load Da	ta Source
	From file:	C:\fakepath\cs\	Browse
	Туре:	CSV	~
	All SKU in file have check digit 1:	Autodetect	~
	强 Do	ownload example	

• **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	1) The item is marked as valid.
SKU type,	2) The item is imported to the draft.	
		1) Zero values are added to the beginning of the
2	s not equal to the length of the	SKU code to the required length.
relevant SKU type,	relevant SKU type,	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
	1) The item is marked as valid.
Equals to the length of the relevant SKU type,	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	1) The item is marked as invalid.
relevant SKU type,	2) The item is not imported to the draft.

# 8. Click the Load Data Source button.

From File	
	Load Data Source
From file:	C:\fakepath\cs\ Browse
Type:	CSV
[	🛓 Download example



# **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.

Price book	^ ^	Items (Items)						1 items filtered of total 5 items in dra
Categories		Selected to Export	Always Export	ed Available to Ext	oort 🗌 Non Ex	portable	± 2	Select All Select None Remove All
Departments				Product C	iode	portable	-	Add More
Items		Tax 3	Tax 4	Product Code default	Product	Errors		
Price Groups				from Department	Code			Filters
Promo Groups						POS code is empty or has wrong format.	×	Valid (4)
Promotions								Invalid (1)
Item Tags								
Vendors	~							
Drafts								
	Q. +							
Items								
		<					>	
		←			1		$\rightarrow$	

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.				



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	Promo Group Number is empty or has wrong			
format.	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	Promotion Type is not provided or has wrong value
format.	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.
- 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.



Price book	^ ^	Items (Items)						1 items filtered of total 5 items in dra
Categories		Selected to Export	Always Export	ted 📃 Available to Exp	xportable	£ 2	Select All Select None Remove All	
Departments				Product C	ode			Add More
Items		Tax 3	Tax 4	Product Code default	Product	Errors		
Price Groups Promo Groups	- 1				couc	POS code is empty or has wrong format.	×	Filters
Promotions								Invalid (1)
Item Tags								
Vendors	~							
Drafts	a +							
Items								
		<					>	
		←			1		$\rightarrow$	

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.
- 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.

Price book	^	^	Items (Items)						1 items filtered of total 5 items in dra
Categories			📕 Selected to Export 📕 Always Exported 📄 Available to Export 📄 Non Exportable 🎿 🥜					£ 2	Select All Select None Remove All
Departments					Product C	ode			Add More
Items			Tax 3	Tax 4	Product Code default from Department	Product Code	Errors		
Price Groups Promo Groups							POS code is empty or has wrong format.	×	Filters Valid (4)
Promotions									Invalid (1)
Item Tags									
Vendors		~							
Drafts	Q -	-							
Items									
			<					>	
			←			1		$\rightarrow$	

## 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.

Price book	^ ^	Items (Items)						1 items filtered of total 5 items in draft
Categories		Selected to Export 📕 Always Exported 🗌 Available to Export 🗌 Non Exportable						Select All Select None Remove All
Departments				Product Code				Add More
Items		Tax 3	Tax 4	Product Code default	Product	Errors		
Price Groups Promo Groups						POS code is empty or has wrong format.	×	Filters
Promotions								<ul> <li>Invalid (1)</li> </ul>
Item Tags								
Vendors	~							
Drafts								
	4 T							
Items								
		<					>	
		←			1		$\rightarrow$	