Product Information Management (PIM) Manual

For Petrosoft Customers

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ABOUT PIM

Product Information Management (PIM) represents an integrated solution providing a tool for large distributed companies they need for managing price books in a centralized way over thousands of locations.

KEY FEATURES

- **Centralized price book management**. PIM allows head office managers to set up price books for different market segments, regions, locations or other subsets of your customers. For example, you can create one set of prices for one geographic region and another set of prices for another geographic region.
- **Item multilingual support**. With PIM, you can set up descriptions for items in different languages and send these localized descriptions to stores in different geographic regions or locations.
- **Global price management—bulk changes**. PIM provides a way to centrally set up and manage global prices for chains of stores and distribute them to channels and back offices.
- **Centralized promotion management**. PIM provides a way to centrally set up and manage promotions, and define dates when promotions must be in effect for channels and back offices.
- **Support for GDSN attributes as additional item attributes**. When setting up items description, you can use a pool of GDSN attributes to deliver accurate and complete retail information about items.
- **Review updates before sending them to sites**. Head office managers can review changes before sending them to channels and back offices.
- **Review updates and accept or reject them on sites**. To be aware of price changes coming from the head office, branch office managers can review updates before they push them to cash registers on local sites and adjust offered price changes if necessary, or reject the updates.

PIM USER ROLES

You can work with PIM on two main levels:

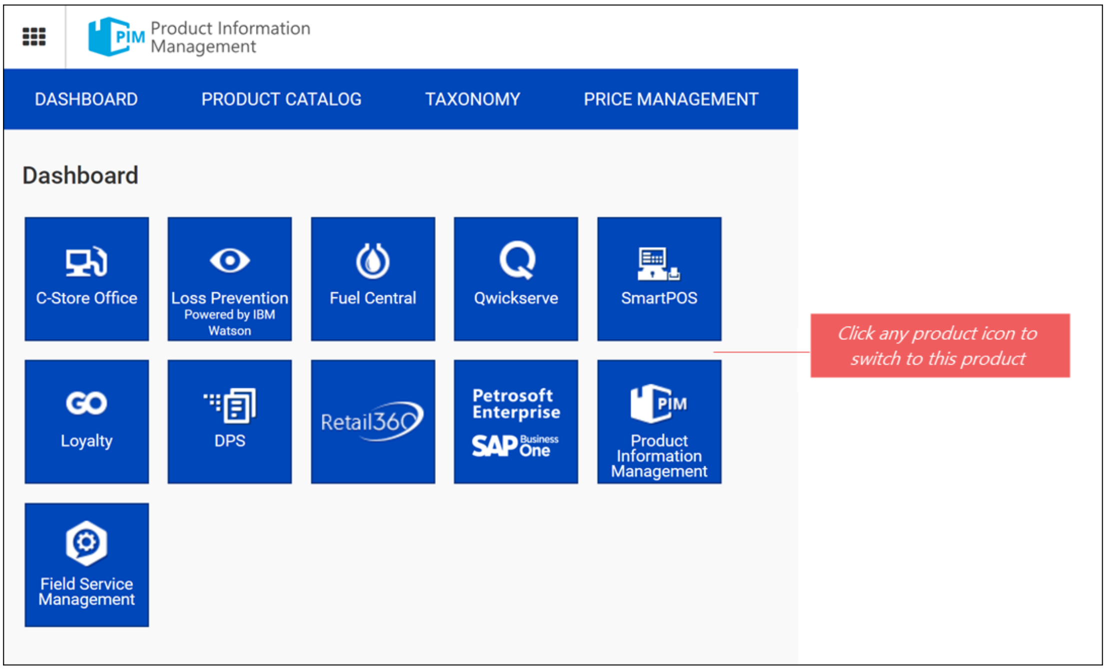
- **Head office level**—the Head Office role.
  Users with the Head Office (HO) role represent general managers who set up price book for their locations and send updates to all or some of them.
- **Location or branch office level**—the Branch Office role.
  Users with the Branch Office (BO) role represent location managers who receive price book updates from the head office to their locations, accept or reject these updates, and work with the configured price book on the location level.

User roles are configured at CStoreOffice® side. For more details, see the Roles Management Permissions section at Petrosoft University Portal.

DASHBOARD

The Dashboard section contains the icons of all products available to your account.

From the Dashboard section, you can switch to any product you need, by clicking the corresponding icon.



PIM WORKFLOW

PIM is designed for companies and retail chains with the head office/branch office organizational structure. In such companies, the head office is the headquarters of the company. Branch offices are organizational units that are physically separated from the main office, but do not constitute separate legal entities.

In PIM, the head office is the top level in the company hierarchy. All important management activities, such as product catalog setup and price management, are coordinated there. Changes made in PIM are pushed to branch offices to be reviewed, updated if necessary and accepted.

To work with PIM, the head office manager and branch office managers access the PIM portal. Tools and options offered by the portal depend on the role assigned to users accessing the portal. For more details, see PIM User Roles.

When working with the PIM portal, the head office manager and branch manages perform the following activities:

HEAD OFFICE MANAGER ACTIVITIES

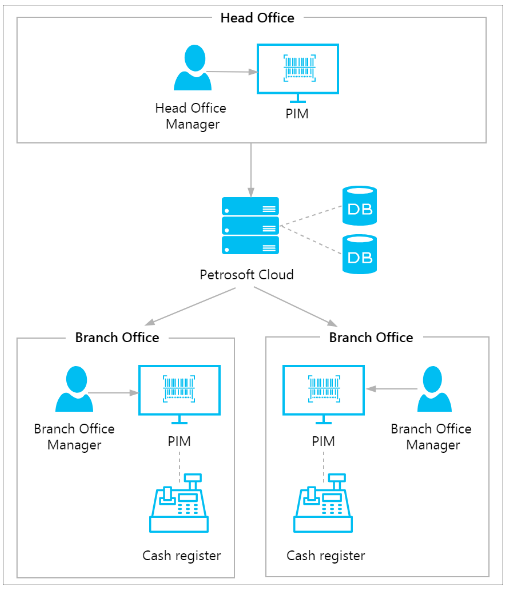
1. **Taxonomy setup**.

   The head office manager sets up taxonomy objects to classify the company entities: creates item tags and categories, specifies information about vendors, price groups and promo groups, defines cash register departments and so on. For more details, see Taxonomy.

2. **Product catalog setup**.
   The head office manager sets up global items attributes and populates the product catalog, either by entering items data manually or importing items data in bulk with the Import tool. For more details, see Product Catalog.
3. **Item price management and promotions management**.
   The head office manager defines recommended prices for branch offices and sets up promotions that must be in effect in branch offices. For more details, see Price Management and Discount Management.
4. **Pushing updates to branch offices**.
   The head office manager reviews the pricing and discount model and sends this information to branch offices. For more details, see Outgoing Updates.

BRANCH MANAGER ACTIVITIES

1. **Review and acceptance of price model**.
   The branch office manager reviews the price model set up by the head office manager and accepts price changes for the branch office, or rejects them. For more details, see Incoming Updates.
2. **Sending updates to POS**.
   Upon price model review and acceptance, the branch office manager sends updated data to POS in the branch office. For more details, see Cash Register Updates Manager.



PIM FEATURES

- Product Catalog
- Taxonomy
- Price Management
- Discount Management
- Updates Manager
- PIM Reports

Product Catalog

Product Catalog Workflow Overview

Following are the steps for items setup in PIM:

BASIC STEPS	
Detailed Steps	**For details, see...**
STEP 1: A user with the Head Office sets up item attributes in the product catalog.	
a. Log in to PIM using the Head Office role.	PIM User Roles.
b. Set up basic item attributes and additional item attributes.	Item Attributes, Setting Up Item Attributes.
c. Set up global item attributes.	Global Item Attributes.
STEP 2: A user with the Head Office role populates the product catalog with the items data.	
Add information about items manually or import items data.	Managing Items, Import Items.
STEP 3: A user with the Head Office role provides translation for item descriptions.	
Set up descriptions for items in different languages.	Setting Up Multilingual Items Description.
STEP 4: A user with the Head Office role links items to primary items.	
Link several items to the primary item.	Sending Multiple Linked Items to Cash Register.
STEP 5: A user with the Head Office role proceeds to price management.	
Set recommended prices for branch offices.	Price Management.

Items

This section consists of the following subsections:

- Managing Items
    - Creating New Item
    - Editing Item
    - Deleting Item
    - Working with Item Form
- Setting Up Item Attributes
- Working with Items List
- Using Find and Replace Tool
- Setting Up Multilingual Item Description
- Sending Multiple Linked Items to Cash Register
- Managing Items at Location Tags Level

- Setting Up Taxes and Product Codes
- Working with Car Wash Items
- Working with Vendors
- Accepting Item Changes from PIM Automatically

Managing Items

You can perform the following actions with the items:

- Create item
- Edit item
- Delete item
- Mark item as inactive
- Work with the Item form

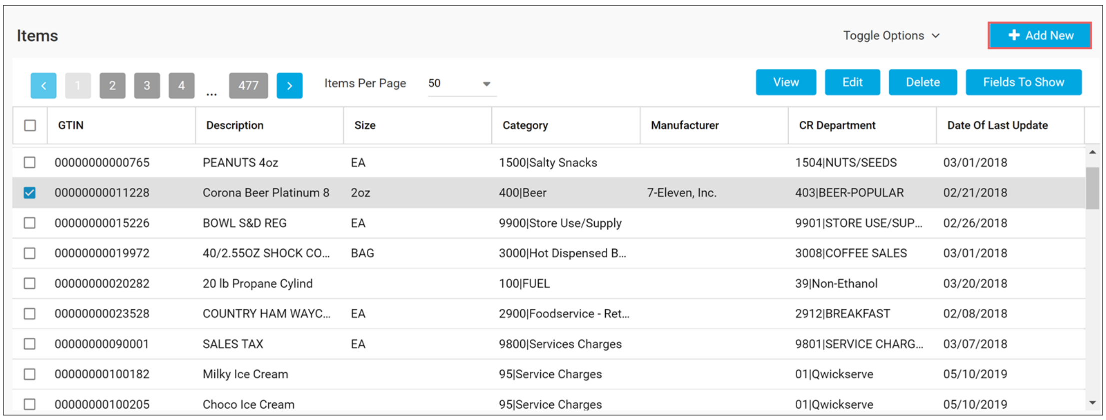
CREATING NEW ITEM

To create a new item in PIM, follow the steps:

1. Go to **Product Catalog** > **Items**.

   Result: The **Items** list opens.

2. At the top right of the **Items** list, click the **Add New** button.



   Result: The **Create** form opens.

3. In the **Create** form, do the following:

   a. In the **Item Attributes** section, specify the following item attributes:

      - **Global Item Attributes**

      HOW TO SPECIFY VALUES FOR GLOBAL ITEM ATTRIBUTES

         - In the **Item Description** field, enter the detailed item's description. This field is required.

- Enter the item's code that you use in your store.

> The UPC-A code is required for pushing your item to a cash register and to accept it by the cash register database.
> In case no item's code is specified, the system will generate the UPC-A code automatically.

For more details, see Global Item Attributes.

- **Account Item Attributes**

HOW TO SPECIFY VALUES FOR ACCOUNT ITEM ATTRIBUTES

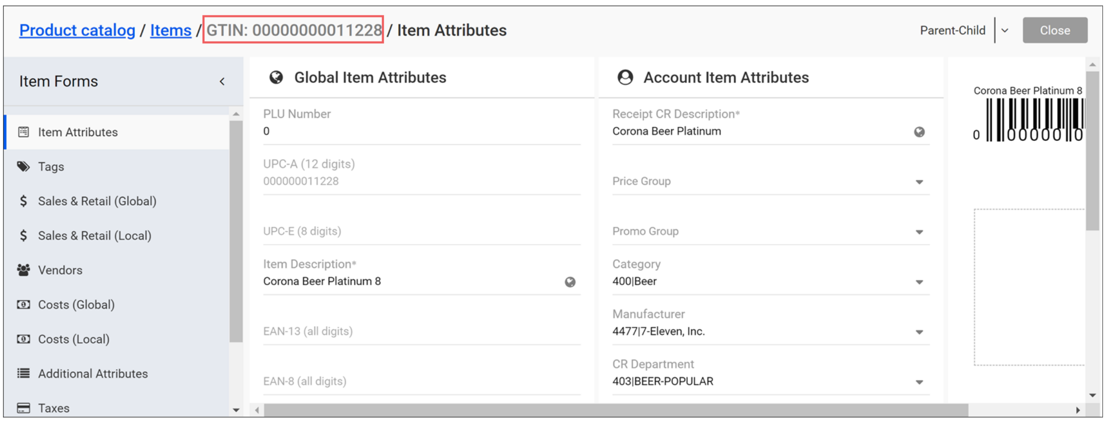
- Make sure the **Receipt CR Description** field is already filled in and the CR description, if needed. This field is filled in automatically with the value from the **Item Description** field (see the **Global Item Attributes** section). This field is required.
- Select a category and a CR department for your item.

> The Category and CR Department fields together with the Receipt CR Description field and the UPC-A field (see the Global Item Attributes section) are required for pushing your item to a cash register and to accept it by the cash register database.

- (Optional) Specify a price group, promo group and other fields for your item, if needed.

For more details, see Account Item Attributes.

b. At the top right of the **Create** form, click the **Create** button.
Result: Your item is created and saved into the system with the defined global and account item attributes. GTIN is assigned automatically to the item.



c. (Optional) Specify the following item settings, if needed:

To...	Do the following:
Specify the item's *description* and/or *receipt cash register description in other languages*.	Go to the **Item Attributes** section > **Global Item Attributes** or **Account Item Attributes**, and then in the **Item Description** or **Receipt CR Description** field correspondingly, click the globe icon. How to Specify Item and Receipt CR Description in Other Languages 1. To the right of the **Item Description** field, click the globe icon. *Result:* The **Item Description** form opens on the right of the page. The procedure for adding receipt CR description is the same. Just click the globe icon at the right of the **Receipt CR Description** field. 2. In the **Item Description** form, do the following: a. At the top right of the form, click the **Add** button. b. In the **Select Language** list, select the language for the item's description from the list of available languages. The following languages are now supported: • **English** • **French** • **Spanish** • **Philippine** • **Portuguese** • **Russian** c. In the field on the right of the **Select Language** list, enter the items' description in the selected language. d. Repeat steps from **a** to **c** for each language you need from the list of available lan-

To...	Do the following:
	guages. e. At the top right of the **Item Description** form, click the **Save** button.
Specify values for the *additional item attributes*, if any.	Go to the **Additional Attributes** section. **HOW TO SPECIFY VALUES FOR ADDITIONAL ITEM ATTRIBUTES** 1. Find the additional attribute whose value you want to specify for your item. 2. In the **Value** column for the found attribute, click the field and then enter the attribute value. For more details, see Additional Attributes.
Specify the *tags* values for your item.	Go to the **Tags** section. **HOW TO SPECIFY VALUES FOR ITEM TAGS** 1. Find the tag that you want to assign to the item. 2. Click the **Value** field for the tag. 3. In the **Tag** list, select the check box next to the tag that you want to assign to the item. For more details, see Tags.
Specify the *item retail* values for each location, you need.	Go to the **Sales and Retail** section. **HOW TO SPECIFY ITEM RETAIL PRICES** 1. Double-click the location you need. *Result:* The item prices setup form opens on the right of the page. 2. In the item prices setup form, for each price you need and for the item status, specify the following values: o **Current** - current value o **Upcoming** - future value starting from the specified period 3. At the top right of the item prices setup form, click **Done**.

To...	Do the following:
	Result: The item prices and status are specified for the selected location. For more details, see Sales and Retail.
Specify *the data for the vendor supplying this item.*	Go to the **Purchases & Cost** section. **HOW TO SPECIFY VENDOR DATA** 1. At the top right of the **Purchases and Cost** section, click **Add**. 2. In the **Vendor** list, select the item's vendor. 3. In the **VIN** column, enter the item's number for this vendor. 4. In the **Unit in Case** column, enter the quantity of the item in the packing. 5. At the top of the **Vendor** form, click the **Save** button.
Add *linked items* to your item.	Go to the **Linked Items** section.

4. At the top right of the **Create Item** form, click the **Save** button.

> Please note that the information about when and by whom the item was created is recorded into the system and can be always checked in the **Items** list in the **Created at** and **Created by** fields correspondingly. For more information on how to display these fields in the Items list, see Selecting Fields to Show.

EDITING ITEM

To edit existing item in PIM, follow the steps:

1. Go to **Product Catalog** > **Items**.
   Result: The **Items** list opens.
2. In the **Items** list, find the item you want to edit. Use search, if needed.
3. Select the found item and then click **Edit**.
4. Make updates in all sections you need. For more information on item attributes description, see Setting Up Item Attributes.
5. At the top right of the item editing form, click **Save**.

DELETING ITEM

> The deleting items feature is permission-based. To delete the items, make sure the **Allow users to**

delete items permission is granted to your user.

To delete existing item in PIM, follow the steps:

1. Go to **Product Catalog** > **Items**.
   Result: The **Items** list opens.
2. In the **Items** list, find the item you want to edit. Use search, if needed.
3. Select the found item and then click **Delete**.
4. In the confirmation window, click **Yes**.

MARKING ITEMS AS INACTIVE

When you create a new item, the item is in the Active state by default. If necessary, you can mark the item as inactive. For example, you can mark an item as inactive if you need to provide additional information for the item and do not want the item to be displayed in the items list for some time.

PIM treats changes in the item state in the following way:

- If the manager marks an item as inactive in the head office, these changes are propagated to branch offices. The item is activated in all sites.
- If the manager marks an inactive item as active in the head office, these changes are not propagated to branch offices. The item is marked as active in the head office only.

To mark an item as inactive, follow the steps:

1. Go to **Product Catalog** > **Items**.
   Result: The **Items** list opens.
2. In the **Items** list, find the item you want to mark as inactive. Use search if needed.
3. Select the found item and then click **Edit**.
4. In the left menu of the Item form, select **Item Attributes**.
5. In the **Account Item Attributes** section, select the **Inactive** check box.
6. At the top right corner of the form, click the **Save** button.
7. In the confirmation window, click **Yes**.

WORKING WITH ITEM FORM

To set up data for an item in PIM, use the Item form. The Item form is a central area where you can configure all the necessary item settings:

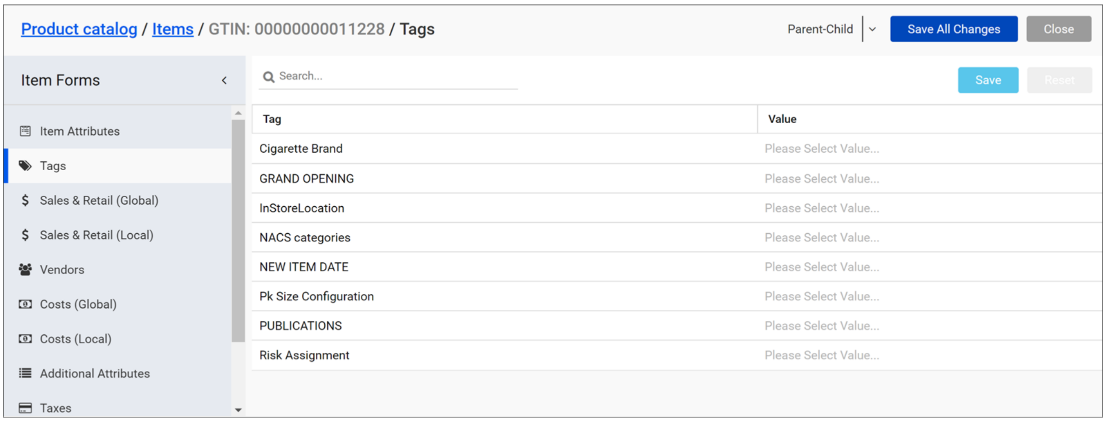
- Specify item attributes at the global and account level
- Set up additional attributes for the item
- Assign tags to the item
- Set up sales and retail information for the item
- Specify purchases and costs data
- Link other items to the primary item

For more details, see Setting Up Item Attributes.

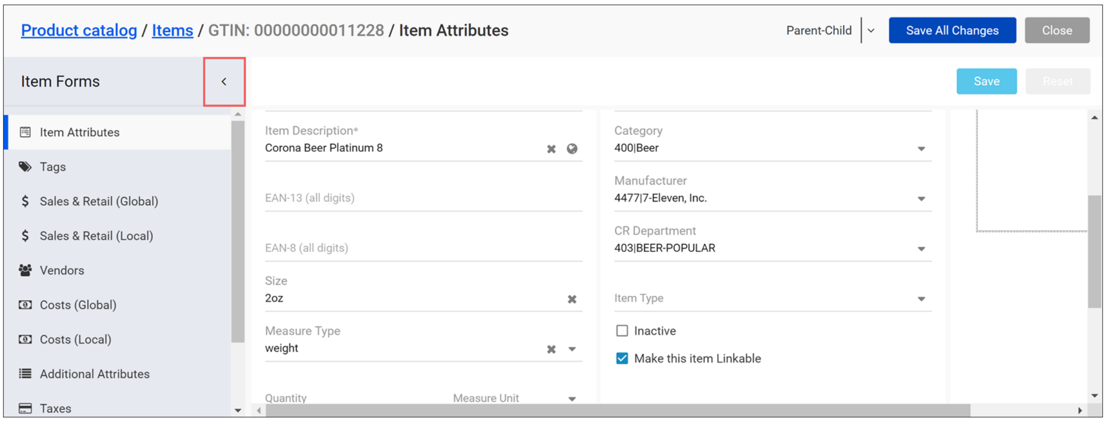
To access the Item form, follow the steps:

1. Go to **Product Catalog** > **Items**.
2. In the items list, use the Find tool to find the necessary item.
3. Select the item and click **View** to view the item settings or **Edit** to edit the item settings.

The item settings are presented in a set of sections under the Item Forms list. To access a specific section, click a corresponding tab in the left menu. For example, to assign tags to the item, click **Tags**.

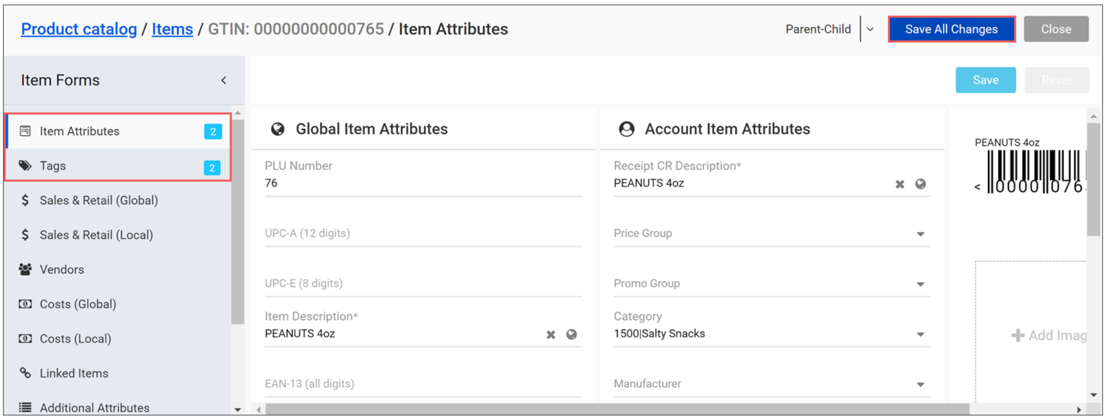


The Item forms menu can be collapsed to provide you with more area for editing item settings. To collapse the Items forms menu, click the **<** icon at the top right of the list. To expand the list back, click the **>** icon at the bottom of the list.



When you update some settings on the Item form, PIM displays the number over the tab on which settings have been changed. The number defines the number of updates made in the corresponding section. When you have finished configuring the settings, you can save the results in one of the following ways:

- To save the changes that have been made in the currently opened section of the Item form, at the top of the section, click the **Save** button.
- To save the changes that have been made in all sections of the Item form, at the top of the Item form, click the **Save All Changes** button.



Setting Up Item Attributes

You can configure the following item's attributes and other settings in PIM while creating or editing an item:

- Global Item Attributes
- Account Item Attributes
- Tags
- Sales and Retail (Global)
- Sales and Retail (Local)
- Vendors
- Costs (Global)
- Costs (Local)
- Linked Items
- Additional Attributes
- Taxes
- Product Code

- Car Wash Settings
- Item Taxonomy

GLOBAL ITEM ATTRIBUTES

Global item attributes you can configure for the item during its creation are presented in the table below.

Global Attribute Name	Global Attribute Description
PLU Number	An arbitrary identification number used to track sales of items without a UPC code such as fountain drinks, etc.
UPC-A	11- or maximum 12-digit UPC code of an item. The item with undefined UPC-A cannot be pushed to a cash register and accepted by the cash register database.
UPC-E	The reduced UPC code type E. This is usually 7 digits. If you have an 8-digit code without the first 0, the first digit shall be dropped. The code can be also 6- digit, without the first and the last numerals.
Item Description	The detailed item's description. This field is required.
EAN-13	The 13-digit EAN-13 barcode of the item.
EAN-8	The 8-digit EAN-8 barcode of the item.
Bulloch Item Number	Defines the item number for Bulloch cash registers. Possible values: - **1-13**: Enter the number of Bulloch POS machines installed on your account. - **Empty**: Leave this field blank, in case there are no Bulloch POS machines installed on your account.
Prompt for Price	Ability to ask and assign any price on the cash register. Possible values: - **Selected**: If the price can be assigned on the cash register. - **Unselected**: If the price cannot be assigned on the cash register. This field is displayed only if at there is at least one Bulloch cash register installed at your account.
Size	The item's size.
Measure Type	This list contains the following measure types you can assign to your item: **Piece**, **Weight** or **Volume**.
Measure Unit	This list is displayed if **Weight** or **Volume** is selected in the **Measure Type** field. In this list, you can select the units of measurement for your item.
Length	Enter the item's length.
Width	Enter the item's width.

Global Attribute Name	Global Attribute Description
Height	Enter the item's height.
GTIN	The global trade item number assigned automatically by the system for each newly created item.

ACCOUNT ITEM ATTRIBUTES

Account item attributes you can configure for the item are presented in the table below.

Account Attribute Name	Account Attribute Description
Receipt CR Description	This field contains the description that will appear on the receipt that the cash register prints. The size of this field is limited to 24 symbols, including spaces. For more information about processing the item description, including special symbols, spaces and so on, see Processing Item Descriptions. The item with undefined receipt cash register description cannot be pushed to a cash register and accepted by the cash register database.
Price Group	In this list, you can select a price group to assign your item to it. For more information on working with price groups, see Price Groups.
Promo Group	In this list, you can select a promo group to assign your item to it. You need to assign your item to a promo group, in case the item participates in a promotion. For more information on working with promotions, see Discount Management.
Category	In this list, select a category to assign your item to it. For more information on working with categories, see Categories. The item with undefined category cannot be pushed to a cash register and accepted by the cash register database.
Manufacturer	This field allows you to append the manufacturer or producer to the item entry. If PIM knows the item code of the manufacturer, it will be chosen automatically upon saving the item.
CR Department	In this list, select a cash register department to assign your item to it. For more information on working with cash register departments, see CR Departments. The item with undefined CR department cannot be pushed to a cash register and accepted by the cash register database.
Item Type	This option is active only for the Radiant cash registers. It allows specifying the item types according to the Radiant classification.
Gift Card Terms and Conditions	This option is active only for the Radiant cash registers. The default value is 0 or empty. To send the item to your cash register as a gift card, enter 1.

Account Attribute Name	Account Attribute Description
	To configure the gift cards terms and conditions for your item, make sure this option is turned on for your cash register in CStoreOffice®. For details, see the Station Options: Cash Register section. This option is displayed in the Account Item Attributes section in case at least one of the following conditions are met: - The **Item Type** option for the item has one of the following values: **SVC Activation** or **SVC Reload**. *or* - The **Item Type** option for the item is empty, but the item belongs to the CR Department which has the **Radiant Item Type** option with **SVC Activation** or **SVC Reload** value.
Inactive	Select this option to mark the item as inactive. For details, see Marking Items as Inactive.
Make this item Linkable	Select this check box, if you want to associate or link your item with another item. For more information on working with linked items, see Linked Items. Linkable item cannot have linked items, so when this option is selected for the item, the Linked Items section is unavailable.

TAGS

The Tags section contains all tags available for the item.

For more information on managing item tags, see Item Tags.

In the Tags section, you can do the following:

- Specify values for all item tags from the Tags list.
- Switch to the Item Tags setup form by clicking the **Item Tags Setup** button.

SALES AND RETAIL (GLOBAL)

Sales and retail settings you can configure for the item are presented in the table below:

Retail Type	Retail Type Description
Recommended Retail	The purchase price recommended by the head office account owner.
Apply Recommended Retail	Select this option if you want to forbid the recommended retail price change.
Min Retail	The least possible retail price value.
Max Retail	The greatest possible retail price value.
Negotiated Cost	The originally agreed price with the vendor.
Status	The item status: active or delisted.

To easily set up sales and retail prices for items, you can filter the list of locations by location tags. To do this, click the **Filter Locations** button and select check boxes next to locations that you want to display. You can also use the search field to find the necessary location tag. To discard the filter, click the **Clear Selection** icon on the right of the search field.

SALES AND RETAIL (LOCAL)

Sales and retail settings you can view and configure for the item are presented in the table below:

<table>
<tr><th>Retail Type</th><th>Retail Type Description</th></tr>
<tr><td>Last Sales Retails</td><td>The last retail price go for the item from the cash register for particular location. This field is not editable.</td></tr>
<tr><td>Last Sales Date</td><td>The date of the last item sale for the particular location. This field is not editable.</td></tr>
<tr><td>Current Retail</td><td>The current retail for this item for the particular location.</td></tr>
<tr><td>Fix Current Retail</td><td>Select this option in case you don't want to allow your cashiers changing item retail on the register.</td></tr>
<tr><td>Children Retail Summary</td><td>The value in this field displays the summary retail price for all children of the parent item if buying child items separately. This field is not editable.</td></tr>
<tr><td>Retail Source</td><td>The source of retail price from which it is obtained.
POSSIBLE VALUES:
<table>
<tr><th>Value</th><th>Description</th></tr>
<tr><td>PG</td><td>Price Group</td></tr>
<tr><td>OM</td><td>Operator Manual</td></tr>
<tr><td>MM</td><td>Manager Manual</td></tr>
<tr><td>EM</td><td>Executive Manual</td></tr>
<tr><td>EU</td><td>C-Store EDI System</td></tr>
<tr><td>MS</td><td>Master Station</td></tr>
<tr><td>FX</td><td>Fixed Retail</td></tr>
<tr><td>CH: {Account Name}</td><td>Price from distribution channel</td></tr>
</table></td></tr>
<tr><td>Recommended Retail</td><td>The purchase price recommended by the head office account owner.</td></tr>
<tr><td>Recommended Retail Range</td><td>Minimum and maximum retail values for the item.</td></tr>
<tr><td>Profit</td><td>Current profit value.
Calculating Formula: Profit = Item Cost - Item Retail.

This field is recalculated each time the Current Retail is changed.</td></tr>
<tr><td>GPM</td><td>Current profit in percent calculated using Current Retails and Cost.</td></tr>
</table>

Retail Type	Retail Type Description
	This field is recalculated each time the Current Retail is changed.
Min Stock	The minimum number of items remaining in stock before they are automatically reordered.
Promotion Retail	A promotion retail price for the item.
For The Period	A period during which the promotion retail is active.
Remove from CR Database	This field displays the date of the item removal from the cash register.
Status	The item status: active or delisted.

To easily set up sales and retail prices for items, you can filter the list of locations by location tags. To do this, click the **Filter Locations** button and select check boxes next to locations that you want to display. You can also use the search field to find the necessary location tag. To discard the filter, click the **Clear Selection** icon on the right of the search field.

VENDORS

The Vendors section contains a list of vendors supplying the item. For each vendor, you can specify the following information:

Vendor Attribute Name	Attribute Description
Vendor	The name of the supplier's company.
VIN (Vendor Item Number)	Vendor Item Number is an item number in the items catalog of the vendor.
Unit in Case	The quantity of the item in the packing.

The Vendors section is permission-based. It is available only to the users who have the **Allow to edit Item's Vendor Information** permission granted in CStoreOffice®. For more information on how to grant a permission to the user, see Roles and Permissions Management.

COSTS (GLOBAL)

The Costs (Global) section allows you to set up the item cost for vendors in different locations at the global level. In this section, you can configure the following item settings:

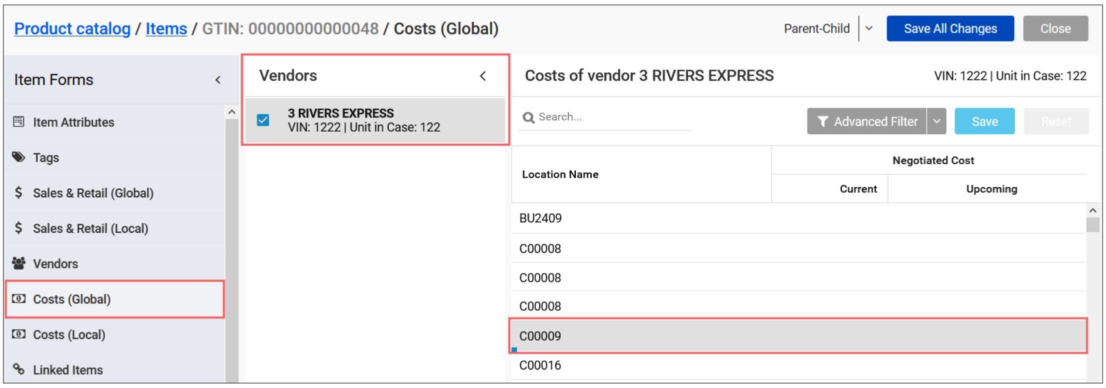
Cost Attribute	Attribute Description
Vendor	The name of the supplier's company.
Location Name	The name of the location for which you want to set up the vendor cost.
Current Negotiated Cost	The current negotiated cost for the item in the selected location.
Upcoming Negotiated	The upcoming negotiated cost for the item in the selected location.

Cost Attribute	Attribute Description
Cost	
Promotion Unit Cost	The promotional cost which is set for the item regardless the item's participation in any active promotion.
Primary Vendor	The option defining if the vendor is primary for the location.

The Costs (Global) section is permission-based. It is available only to the users who have the **Allow to edit Item's Vendor Information** permission granted in CStoreOffice®. For more information on how to grant a permission to the user, see Roles Management Permissions.

To set up costs for the item at the global level:

1. From the main PIM menu, go to **Product Catalog** > **Items**.
2. Find the item you need, select it and click the **Edit** button.
3. In the **Item Attributes** form, click **Costs (Global)**.
4. In the list of available vendors, select the item's vendor for which you will set up the global costs.
5. In the **Costs of vendor** section, select the location for which you want to set up the global costs and double-click it.



Result: The right menu with cost settings opens.

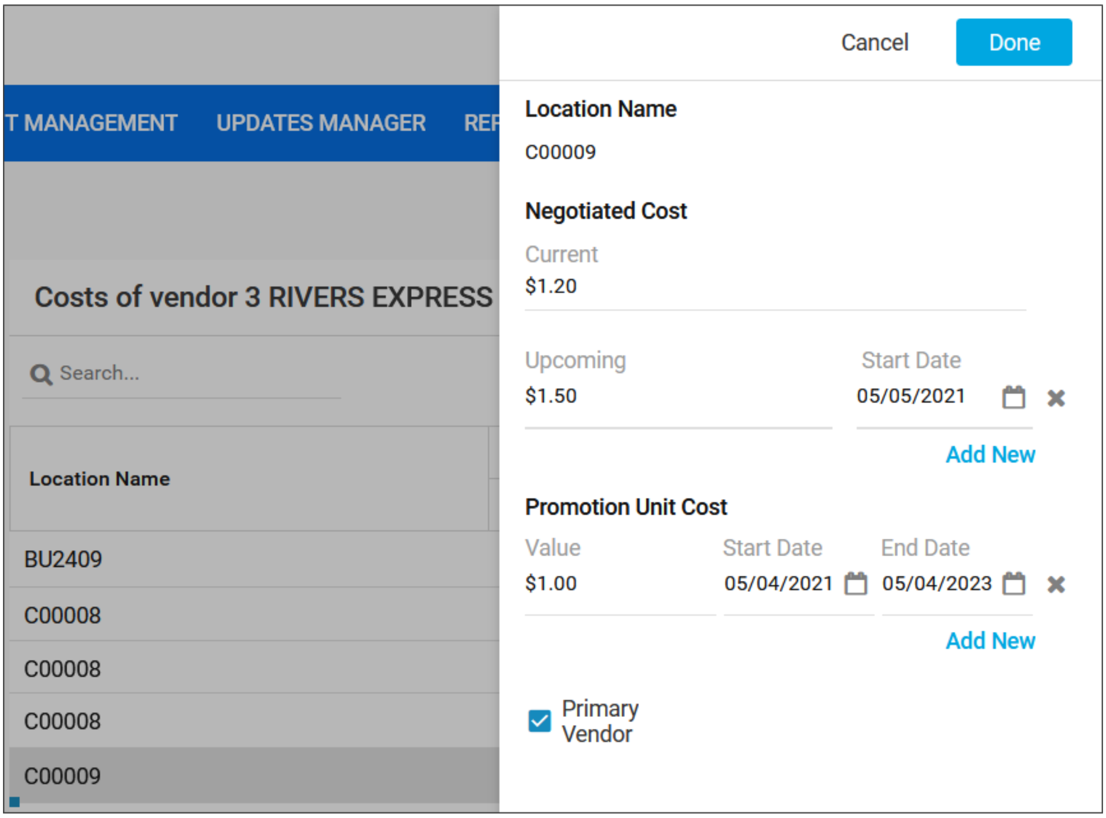
6. In the right menu:
   a. In the **Negotiated Cost** section, set the following values, if needed:
      - **Current**
      - **Upcoming**
      - **Start Date**

   b. In the **Promotion Unit Cost** section, set the following values, if needed:
      - **Value**
      - **Start Date**
      - **End Date**

Please note that the Promotion Unit Cost settings configured in this section are applied to the item only if the corresponding option is activated in the CStoreOffice® account settings. For more information, see Setting Up the Promotion Cost.

c. Select **Primary Vendor**, if you need to set the selected vendor as the primary vendor for the item on this location.

d. At the top right of the menu, click **Done**.



COSTS (LOCAL)

The Costs (Local) section allows you to set up the item cost for vendors in different locations at the local level. In this section, you can configure the following item settings:

Cost Attribute	Attribute Description
Vendor	The name of the supplier's company.
Location Name	The name of the location for which you want to set up the vendor cost.
Current Negotiated Cost	The current negotiated cost for the item in the selected location.
Upcoming Negotiated Cost	The upcoming negotiated cost for the item in the selected location.
Primary Vendor	The option defining if the vendor is primary for the location.

The Costs (Local) section is permission-based. It is available only to the users who have the **Allow to edit Item's Vendor Information** permission granted in CStoreOffice®. For more information on how to grant a permission to the user, see Roles Management Permissions.

LINKED ITEMS

The Linked Items section displays the list of items linked to your item. You can view the following data on each linked item in the list:

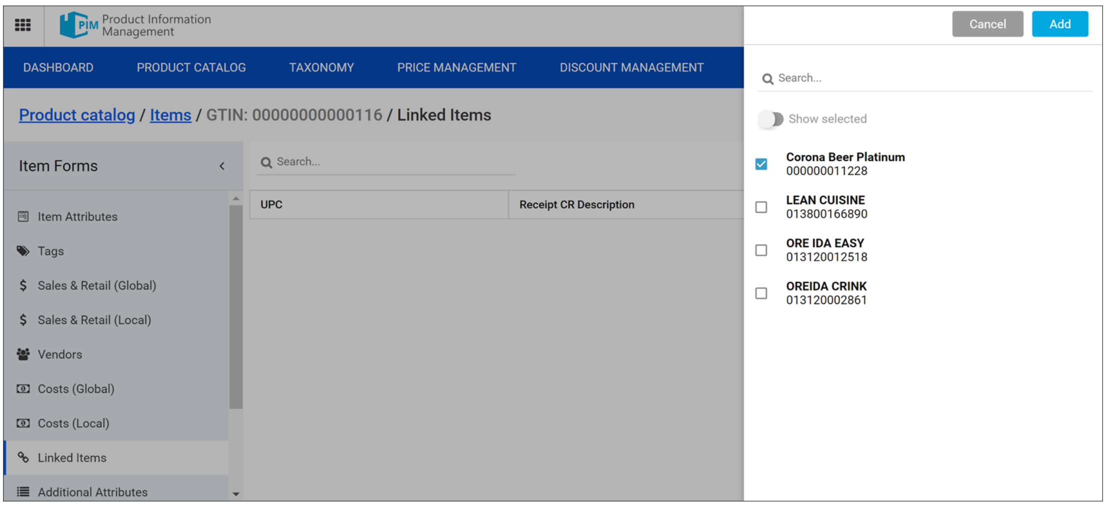
- **UPC**: linked item UPC code.
- **Receipt CR Description**: linked item description that will appear on the receipt that the cash register prints.

You can perform the following actions in the Linked Items section:

ADD LINKED ITEMS

To add a new item to the Linked Items list:

1. At the top right of the **Linked Items** list, click **Add**.
2. Select a linked item by UPC or receipt CR description:
    - To select an item by UPC, in the search field, enter the UPC code or a part of it and select the necessary item in the list. Note that PIM automatically adds the check digit to the entered UPC code.
    - To select an item by receipt CR description, in the search field, enter the item description printed on the receipt, or a part of the item description, and select the necessary item in the list.
2. At the top right of the linked items form, click the **Add** button.

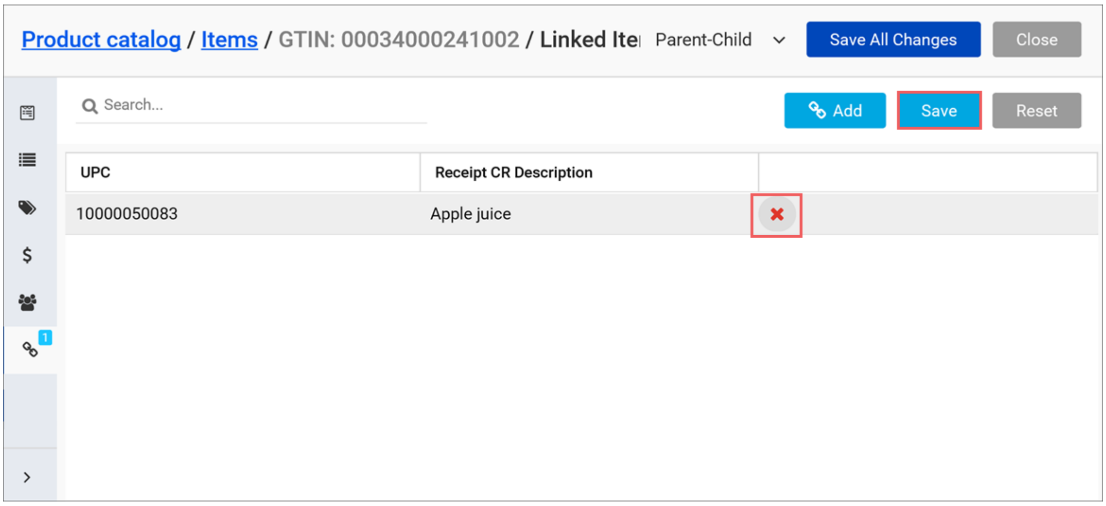


In case the **Add New** button is not active, you have no linkable items available.
To make the item linkable, go to this item's editing form > **Item Attributes** section > **Account Item Attributes** subsection > select **Make this item Linkable**.

REMOVE LINKED ITEMS

To remove a linked item from the Linked Items list:

1. Hover the mouse over the linked item that you want to remove from the list.
2. On the right of the **Receipt CR Description** column for this item, click the delete icon.
3. At the top right of the item editing form, click the **Save** button.



ADDITIONAL ATTRIBUTES

In the Additional Attributes section, you can specify values for all attributes added additionally from the global item attributes to the account item attributes.

For more information on managing additional item attributes, see Additional Item Attributes.

TAXES

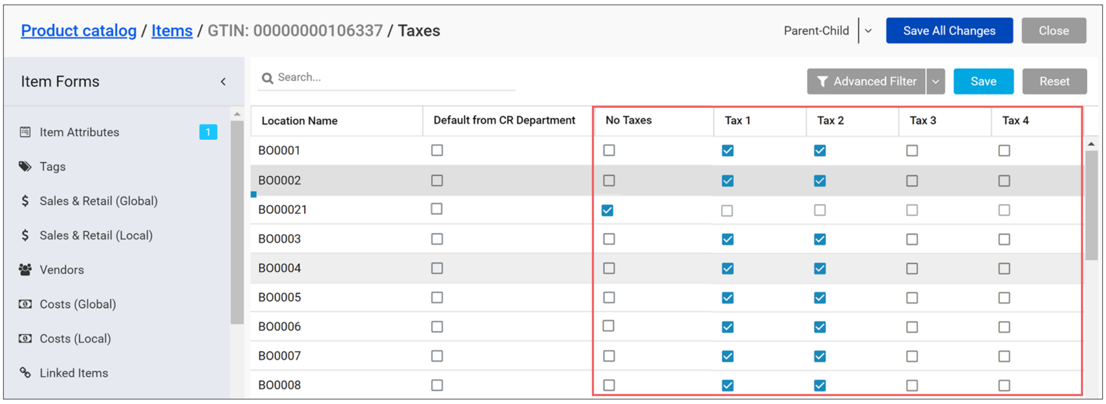
In the Taxes section, for each location, you can apply taxes to items depending on the local taxation.

You can also set up taxes for items in bulk. For details, see Setting Up Taxes and Product Codes.

To set up taxes for a location in the **Taxes** section:

- If you want to save the taxes settings from the item's CR Department:
  a. Select the **Default from CR Department** option for your location.
  b. At the top right of the table, click **Save**.
- If you want to set up your own taxes strategy for an item for this particular location:

a. Clear the **Default from CR Department** option for this location.
b. Select the necessary check boxes in the **No Taxes**, **Tax 1, Tax 2, Tax 3, Tax 4** columns.
c. At the top right of the form, click **Save**.



Make sure the taxes settings are configured properly in CStoreOffice®. For details, see the Setting Up Item Taxes section.

PRODUCT CODE

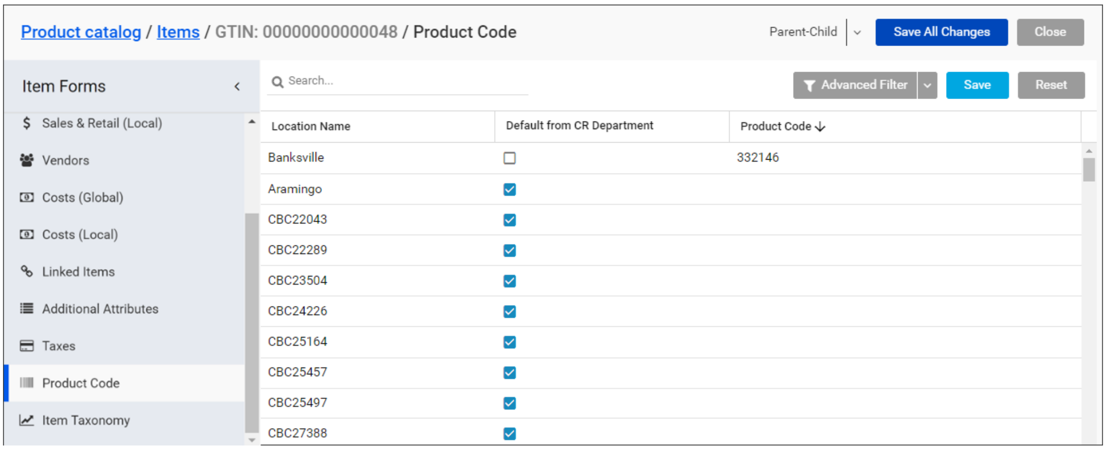
In the Product Code section, for each location, you can apply product codes to the items.

You can also set up product codes for your items in bulk. For details, see Setting Up Taxes and Product Codes.

To set up product codes for a location in the **Product Code** section:

- If you want to save the product code settings from the item's CR Department:
  a. Select the **Default from CR Department** option for your location.
  b. At the top right of the table, click **Save**.
- If you want to set up your own product code for an item for this particular location:
  a. Clear the **Default from CR Department** option for this location.
  b. In the **Product Code** field for this location, enter the item product code.

c. At the top right of the table, click **Save**.



Make sure the product codes settings are configured properly in CStoreOffice®. For details, see the Setting Up Item Product Codes section at **CStoreOffice®** > **Price Book** > **Items** in the Petrosoft Cloud Help.

CAR WASH SETTINGS

This section is displayed in the Items form only for the car wash items.

In the Car Wash Settings section, you can set up the settings for your car wash item.

For details, see Working with Car Wash Items.

The operations with the item car wash settings are permission-based:

- To view the Car Wash Settings tab in the Items form, make sure the **Allow users to view item CarWash tab on local level** permission is granted to your user.
- To edit the item car wash settings in the Items form, make sure the **Allow users to edit item CarWash tab on local level** permission is granted to your user.
- To view edit car wash settings, make sure the **Allow user to setup CarWash settings** permission is granted to your user.

ITEM TAXONOMY

In the Item Taxonomy section, you can set up the association between the items and the following categories:

- NACS Category
- GPC (Global Product Classification) Category

To assign above categories to your item in the **Item Taxonomy** section, for each category, select the category and Sub category from the lists.

NACS and GPC categories and sub categories values are taken from CStoreOffice® relevant categories.

Working with Items List

The Items form displays items that you have set up in the product catalog. When working with the items list, you can perform the following actions:

- Display the items list
- Hide and display Find and Replace options
- Select fields to show
- Sort and group items

DISPLAYING ITEMS LIST

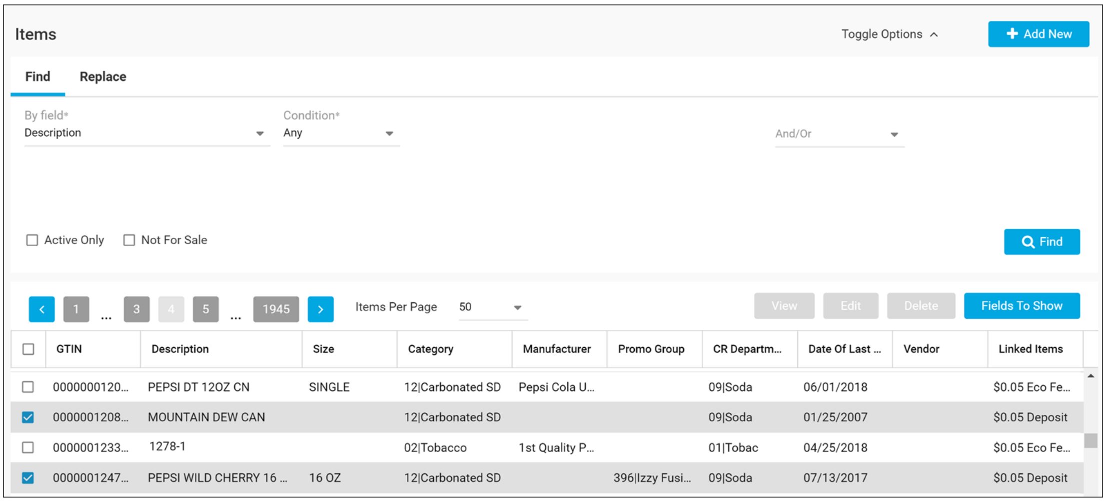
When you access PIM and go to **Product Catalog** > **Items**, the items list is empty. To display items in the product catalog, use the Find and Replace tool:

1. Check the top left corner of the **Find and Replace** section and make sure that the **Find** option is selected.
2. In the **By field** list, select the field by which you want to search for items.
3. In the **Condition** list, select the search operator.
4. In the **Items to search** field, enter the search value.
5. At the bottom of the search filter, click the **Find** button.

For example, to display all items that exist in the product catalog, you can set the following search filter:

- By field: **Description**
- Condition: **Any**

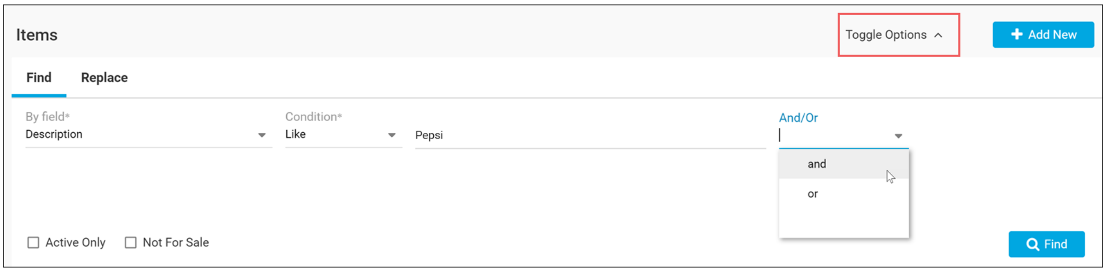
Result: PIM displays all items that match the specified search criteria.



HIDING AND DISPLAYING FIND AND REPLACE OPTIONS

By default, the Find and Replace section is expanded in the items list. You can collapse this section to display a greater number of items in the items list and work with them in a more convenient way.

- To collapse the Find and Replace options, at the top right corner of the items list, click **Toggle Options**.
- To expand the Find and Replace options, click **Toggle Options** once again.



SELECTING FIELDS TO SHOW

To facilitate work with the items list, you can select which item attributes you want to display in the items table.

PIM allows you to display the following fields for items:

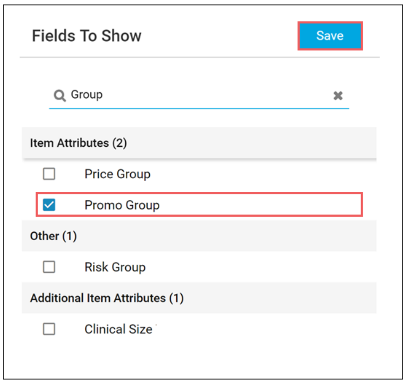
- **Item attributes**
  - GTIN
  - UPC-A (12 digits)
  - UPC-E (7 digits)
  - PLU
  - Item Description
  - CR Description

  - Size
  - Inactive
  - Category
  - Manufacturer
  - Manufacturer code
  - Price Group
  - Promo Group
  - CR Department
  - Date Of Last Update
  - Measure type
  - Length
  - Width
  - Height
  - Created at
  - Created by
- **Other attributes**
  - Risk Group
  - VIN
  - Vendor
  - Parent UPC (12 digits)
  - Child UPC (12 digits)
  - Linked Items
  - Last date of sales
  - Trusted Index
  - Popularity Index
- **Item tags**
- **Additional item attributes**

For more details, see Setting Up Item Attributes.

To select item attributes to be displayed, follow the steps:

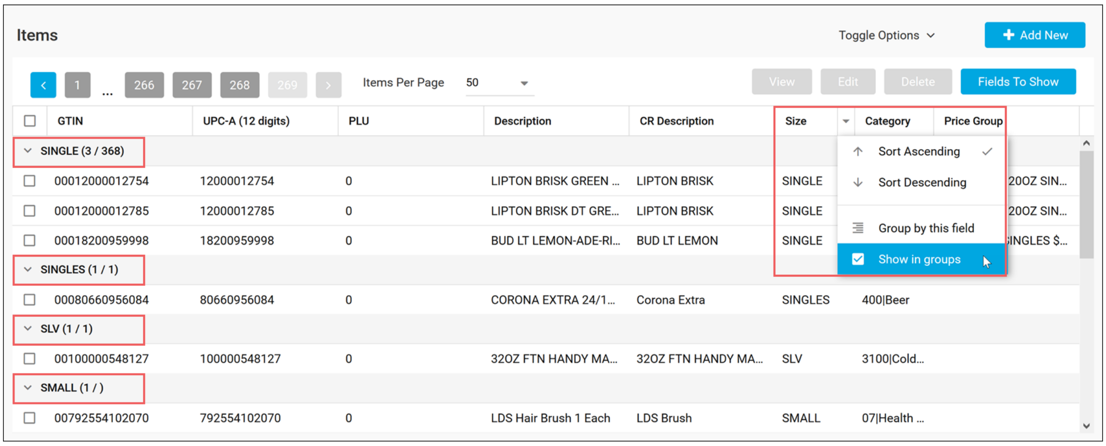
1. On the right of the items list, select **Fields to Show**.
2. In the **Fields to Show** list, select check boxes next to item attributes that you want to display. To quickly find the necessary attribute, use the search field at the top of the list.
3. At the top right corner of the **Fields to Show** list, click **Save**.



SORTING AND GROUPING ITEMS

To facilitate work with items, you can arrange them by specific criteria in the items list.

- To arrange items in the ascending order, in the items list, click the arrow icon next to the necessary column and select **Sort Ascending**.
- To arrange items in the descending order, in the items list, click the arrow icon next to the necessary column and select **Sort Descending**.
- To group items by similar field values, in the items list, click the arrow icon next to the necessary column and select **Group by this field**.
- To discard grouping, in the items list, click the arrow icon next to the necessary column and clear the **Show in groups** check box.



Using Find and Replace Tool

PIM offers the Find and Replace tool that can help you quickly locate necessary items and modify items data. Using the Find and Replace tool, you can:

- Search for items in the product catalog
- Replace values in item attribute fields

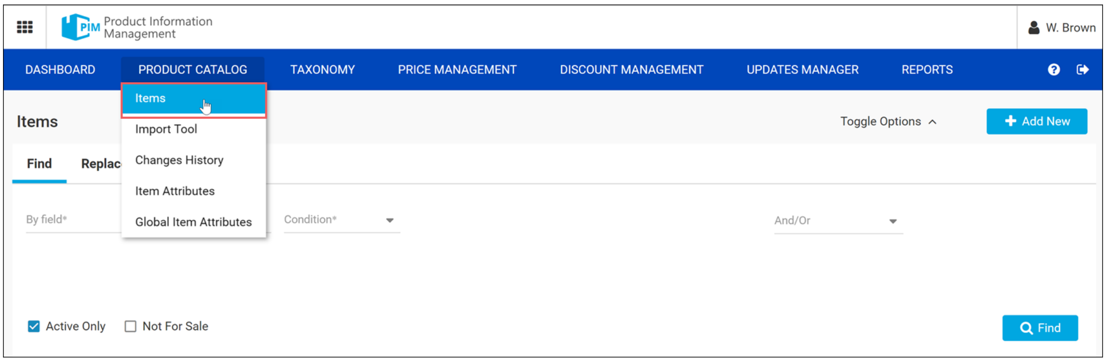
SEARCHING FOR ITEMS

You can use the Find and Replace tool to search for items by item attributes. For example, you can find items that contain a specific word or phrase in their description or items that belong to a specific category. The Find and Replace tool lets you set up combined search requests to quickly locate items that you need in the product catalog.

To search for items in the product catalog, follow the steps:

1. From the main PIM menu, select **Product Catalog** > **Items**.

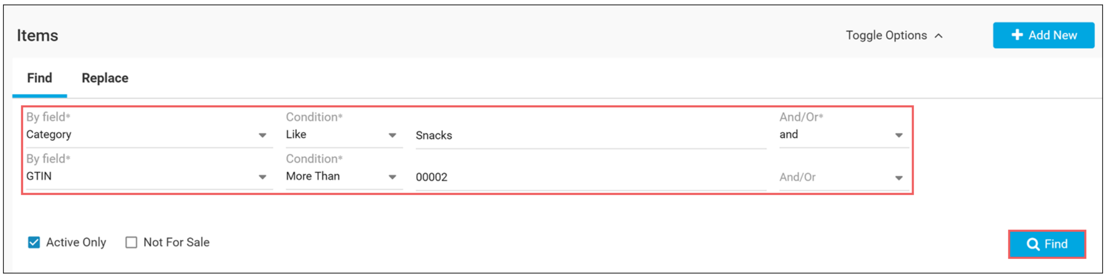
   Result: The **Items** form opens.



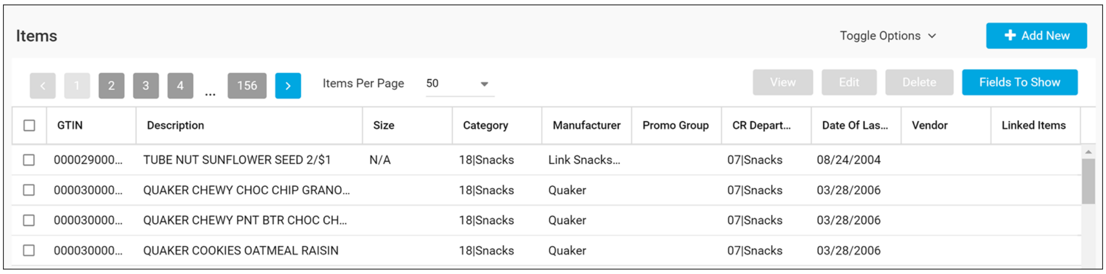
2. In the **By field** list, select the item attribute by which you want to search for items. You can search for items by the following fields:
   - Global item attributes, for example, **Description** or **GTIN**.
   - Additional item attributes, for example, **Component Number** or **Country of Settlement**.
   - Item tags, for example, **Food** or **Snacks**.
   - Other item fields, for example, **Vendor**, **Risk Group** or **VIN**.
3. In the **Condition** field, select one of the following search operators:
   - **Like**: Select this operator to find items with values similar to the search value.
   - **Equal**: Select this operator to find items that exactly match the search value.

- **Empty**: Select this operator to find all items for which there is no entry in the specified attribute field.
- **Exclude**: Select this operator to exclude all items that contain the search value in the specified attributes field.
- **More than**: Select this operator to find all items with values that are greater than the search value.
- **Less than**: Select this operator to find all items with values that are less than the search value.
- **Any**: Select this operator to find items that contain any value in the specified attribute field.

4. In the **Item to search** field, enter the search value.
5. To set up a combined search request, in the **And/Or** field, select the necessary value and set up another search criterion in the request line below.
6. To further narrow the search results, select the **Active Only** and/or **Not For Sale** check boxes if necessary.
7. At the bottom of the search filter, click the **Find** button.



Result: PIM displays a list of items that match the specified search criteria.



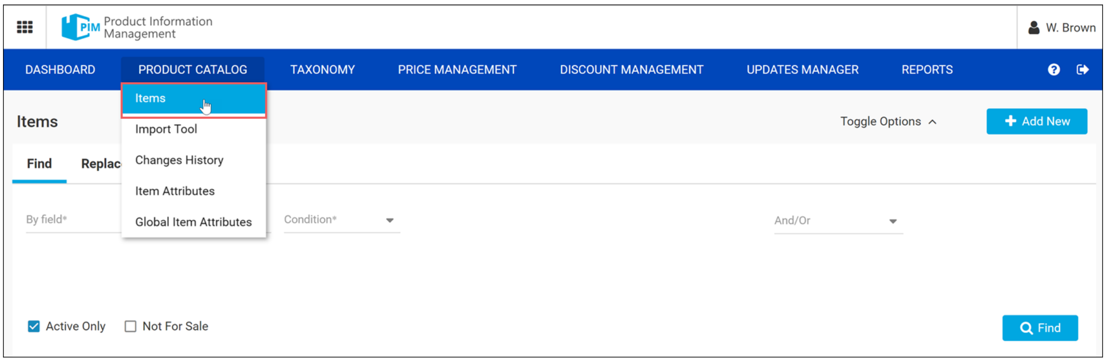
REPLACING ITEM VALUES

You can use the Find and Replace tool to quickly replace values in item attributes for a group of items. For example, you may want to change the category for some items or modify items description.

To replace item attribute values, follow the steps:

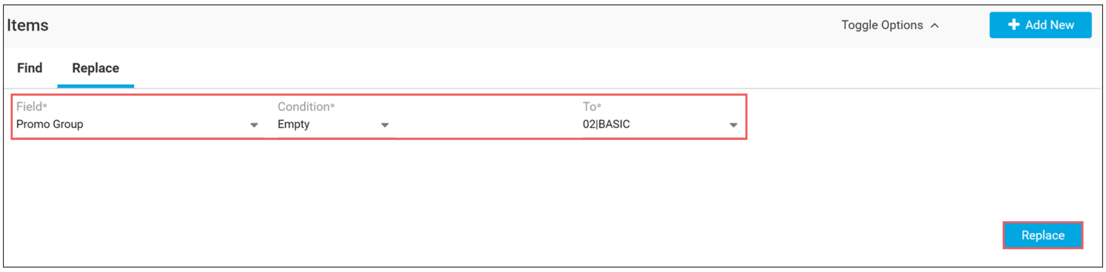
1. From the main PIM menu, select **Product Catalog** > **Items**.

   Result: The **Items** form opens.

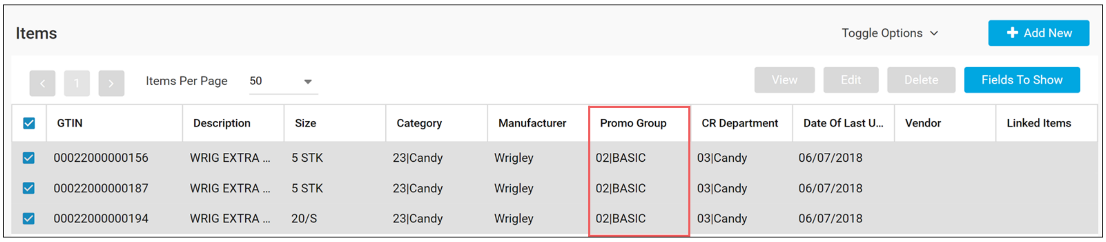


2. Using the **Search** tool, filter items whose attribute values you want to replace. For more details, see Searching for Items.
3. In the list of filtered items, select check boxes next to items whose values you want to replace.
4. At the top left corner of the **Find and Replace** section, click **Replace**.
5. In the **Field** list, select the item attribute whose value you want to replace. You can replace values in the following fields:
   - Global item attributes, for example, **Description** or **GTIN**.
   - Additional item attributes, for example, **Component Number** or **Country of Settlement**.
   - Item tags, for example, **Food** or **Snacks**.
   - Other item fields, for example, **Vendor**, **Risk Group** or **VIN**.
5. In the **Condition** field, select one of the following search operators:
   - **Like**: Select this operator to replace values that are similar to the specified value.
   - **Equal**: Select this operator to replace values that exactly match the specified value.
   - **Empty**: Select this operator to replace empty item attribute values.
   - **Exclude**: Select this operator to exclude from the replace operation all items that contain the search value in the specified attribute field.
   - **More than**: Select this operator to apply the replace operation to all items whose attribute values are greater than the search value.
   - **Less than**: Select this operator to apply the replace operation to all items whose attribute values are less than the search value.
   - **Any**: Select this operator to apply the replace operation to items with any value in the specified attribute field.

6. At the bottom of the replace filter, click the **Replace** button.



Result: PIM replaces values in attribute fields of those items that you have filtered using the **Search** tool.



Setting Up Multilingual Item Description

When working with the product catalog in PIM, you can set up descriptions of items in several languages. As a result, the items descriptions can be displayed at the POS and printed on receipts in the necessary language, depending on the POS language settings. This option can be helpful for retail chains with stores located in different geographic regions or in multilingual areas.

The process of multilingual item description setup is accomplished in the PIM portal by managers who have the following roles:

- Head Office role
- Branch Office role

Managers working with PIM perform the following activities:

1. Define translations for item descriptions.
2. Review and send updates.
3. Review and accept changes.
4. Send updates to cash registers.

Defining Translations for Item Description

This step is performed by a user who has the Head Office role in the PIM portal. As the head office manager, you can specify translations for the following item descriptions:

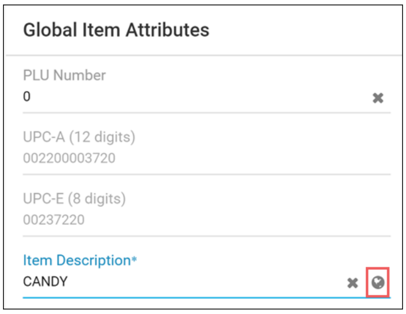
- Global item description
- Item description printed on the cash register receipt

To define translations for item descriptions, follow the steps:

1. Log in to PIM under an account with the Head Office role.
2. In PIM, go to **Product Catalog** > **Items**.

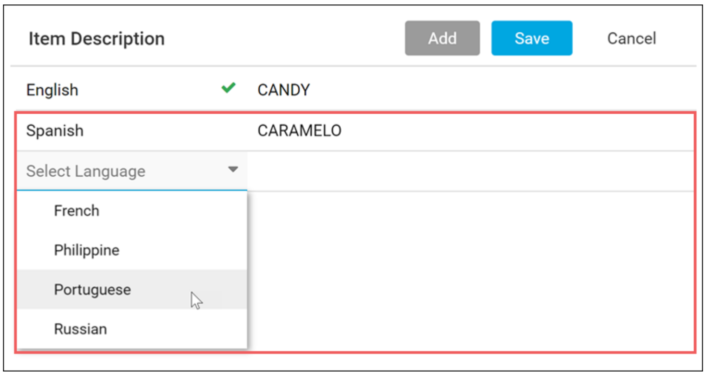
   Result: The **Items** list opens.

3. To create a new item, at the top right corner of the **Items** list, click the **Add New** button. To edit an existing item, select the necessary item in the list and at the top right corner of the **Items** list, click the **Edit** button.
4. Set up the necessary item data as required. For more details, see Creating New Item.
5. In the **Global Item Attributes** section, on the right of the **Item Description** field, click the globe icon.

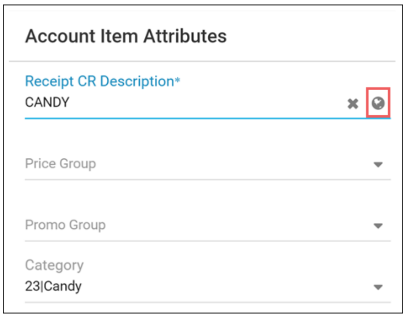
   

   Result: The **Item Description** form opens.

6. At the top of the **Item Description** form, click **Add**.
7. In the **Select Language** list, select a language to which you want to translate the item description.
8. In the field on the right, enter the translation for the item description.
9. At the top of the **Item Description** form, click **Save**.

10. In the **Account Item Attributes** section, on the right of the **Receipt CR Description** field, click the globe icon.
11. Repeat steps 6-9 to enter the translation for the item description printed on the cash register receipt.



12. Set up sales and retail prices for the item and save the changes. For more details, see Setting Up Retail Prices to Price Group.

Reviewing and Sending Updates

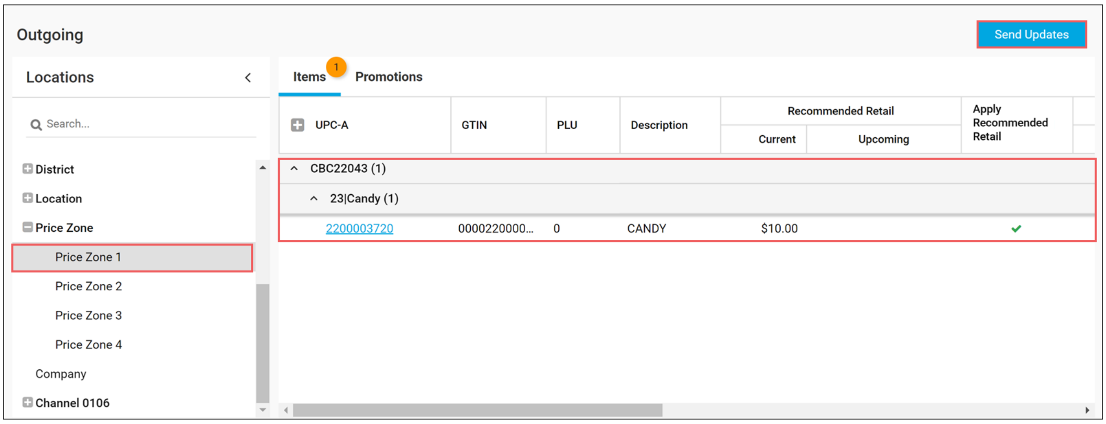
This step is performed by a user who has the Head Office role in the PIM portal. As the head office manager, you must review outgoing item changes and send them to branch offices.

To review and send updates:

1. In PIM, go to **Updates Manager** > **Outgoing**.

   Result: The **Outgoing** form opens.

2. In the left pane, select the location with updated data.
3. In the right pane, expand the updated item(s) and review changes.
4. At the top of the **Outgoing** form, click the **Send Updates** button.
5. In the confirmation message window, click **Yes**.



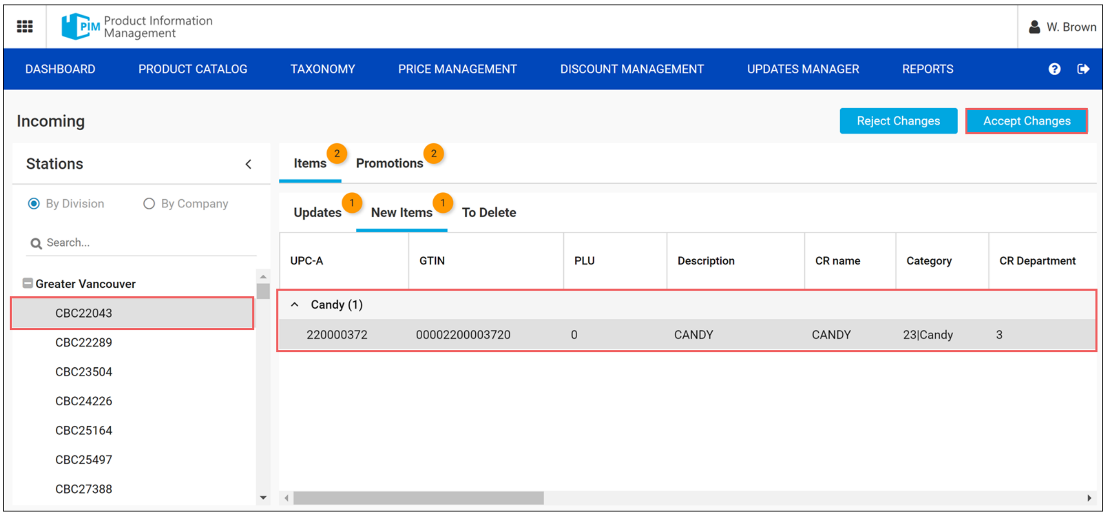
Reviewing and Accepting Changes

This step is performed by a user who has the Branch Office role in the PIM portal. As the branch office manager, you must review incoming changes, adjust the price changes if necessary, and accept them in PIM.

To review and accept incoming changes, follow the steps:

1. Log in to PIM under an account with the Branch Office role.
2. In PIM, go to **Updates Manager** > **Incoming**.

   Result: The **Incoming** form opens.
3. In the left pane, select a location for which item updates are received.
4. In the right pane, expand the updated item(s) and review changes.
5. At the top of the **Incoming** form, click the **Accept Changes** button.
6. In the confirmation message window, click **Yes**.



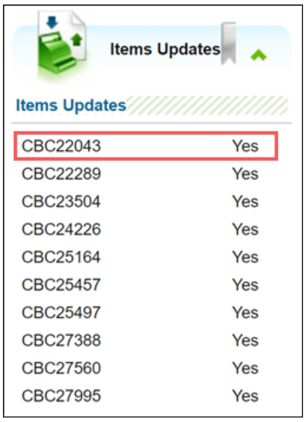
Sending Updates to Cash Register

This step is performed by a user who has the Branch Office role in the PIM portal. As a branch office manager, you must review updates in Items Updates Manager and send them to the cash register in the necessary location. After that, item descriptions in the branch office will be displayed and printed in the necessary language, depending on the POS language settings.

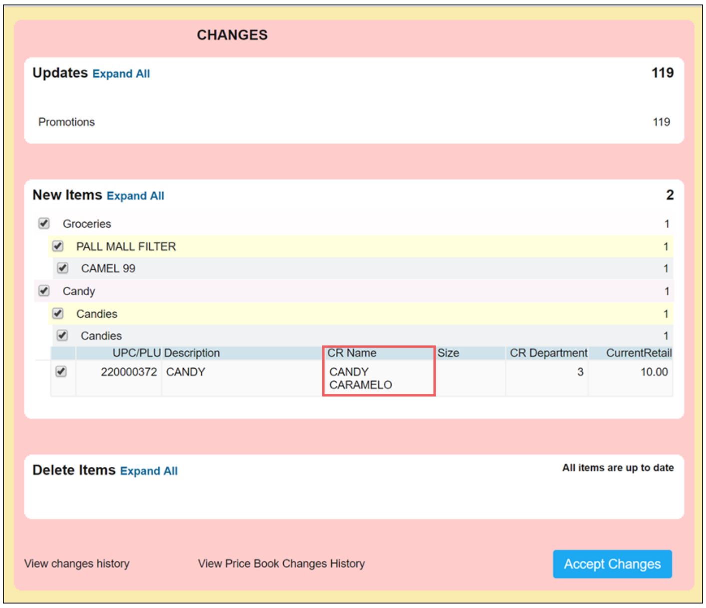
To send updates to the cash register, follow the steps:

1. Switch to CStoreOffice®: go to **Product Switcher** > **CStoreOffice®**.
2. In the left pane of the main CStoreOffice® view, click the arrow icon next to **Items Updates**.

3. In the **Items Updates** list, click a link of the location whose data you want to send to the cash register.



4. In the Cash Register Updates Manager, review the item changes and click the **Accept Changes** button. For more details, see Cash Register Updates Manager.



Sending Multiple Linked Items to Cash Register

In PIM, you can link several items to an already existing item and send these updates to the cash register at your location. All linked items are added to the transaction automatically when the primary (parent) item is purchased.

> Currently multiple linked items can be sent only to the Radiant Cash Register.

The procedure of sending multiple linked items to a cash register includes the following steps:

1. Link several items to a primary item.
2. Send updates to a location.
3. Accept changes on the location with primary item.
4. Send linked items updates to a cash register.

Linking Several Items to Primary Item

To link items to your primary item in PIM, follow the steps:

1. Log in PIM, using the Head Office role.

   > For more information on the PIM roles, see PIM User Roles.

2. Go to **Product Catalog** > **Items**.

   Result: The **Items** list opens.

3. In the **Items** list, find the item, to which you want to link the other items. This item will be a primary item.
4. Select the primary item and then click the **Edit** button.
5. In the item's editing form, do the following:
   a. Go to the **Linked Items** section.

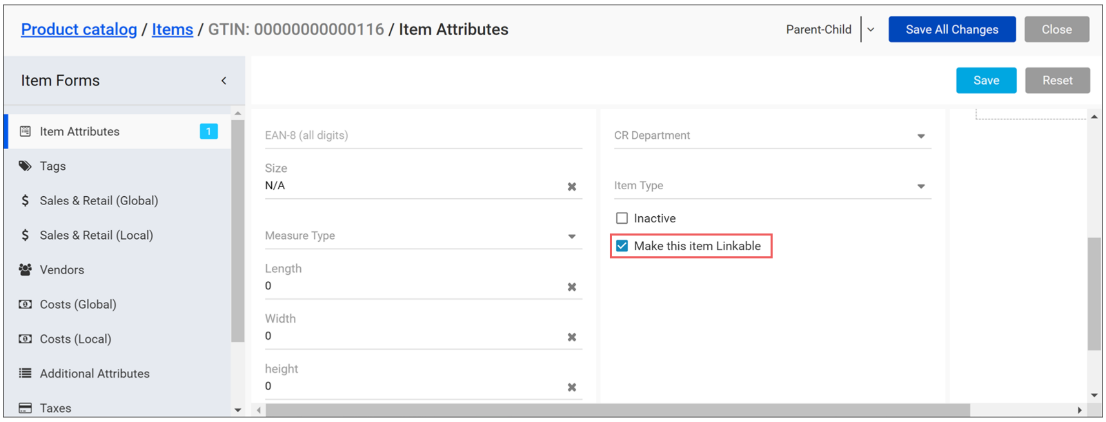
   > In case you don't see the Linked Items section, it means that your current item is linkable. Linkable items cannot have linked items.

   #### REMOVING LINKABLE OPTION FROM ITEM

   To remove the linkable option from your item, follow the steps:

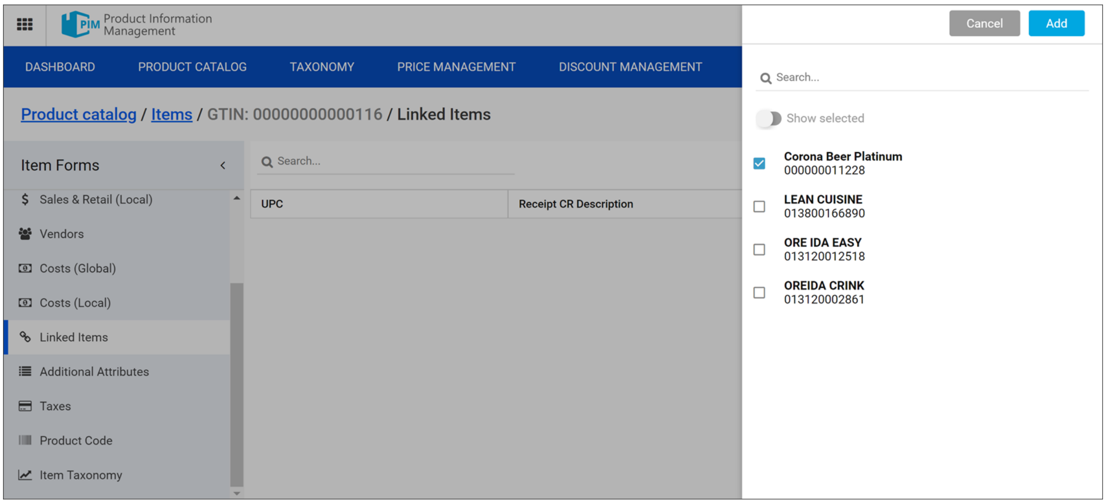
   1. Go to **Item Attributes** section > **Account Item Attributes** subsection.
   2. Clear the **Make this item Linkable** check box.

3. At the top right of the item's editing form, click the **Save** button.



b. On the right of the **Linked Items** list, click the **Add** button.
c. In the displayed linked items list, search for the necessary item by its UPC or description.
d. Select check boxes next to all items that you want to link to the primary item.
e. At the top right of the linked items list, click the **Add** button.
f. At the top right of the **Linked Items** section, click the **Save** button.

Result: Linked items are added to your primary item.



Sending Updates to Location

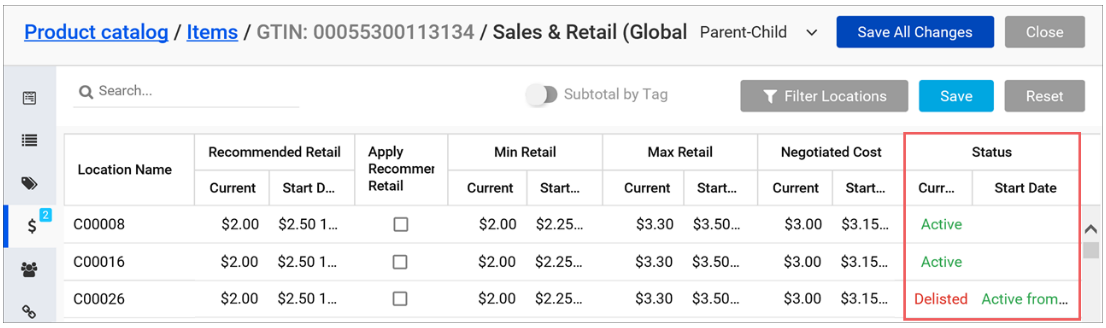
To send your primary item's updates the location with this item, follow the steps:

1. Make sure you are logged in PIM as the Head Office user who linked items to your primary item.

> For more information on the PIM roles, see PIM User Roles.

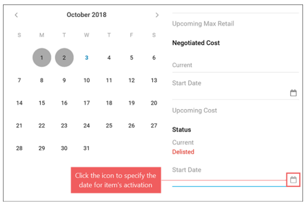
2. Make sure the primary item with linked items updates is active on the location, to which you are going to send this item's updates.
HOW TO ACTIVATE AN ITEM FOR THE LOCATION

1. In the item's editing form, go to the **Sales and Retail** section.
2. Check the **Status** column for the location you need:
   - **Current** column:
     - **Active**: The item is activated on the selected location.
     - **Delisted**: The item is inactive on the selected location.
   - **Upcoming** column:
     - **Active from**: The item will become active on the selected location starting from the specified date.
     - **Delisted from**: The item will become inactive on the selected location starting from the specified date.



3. Double-click the location, for which you want to activate the item.

   Result: The item settings window opens on the right of the **Sales and Retail** section.
4. Move the item settings window till the **Status** section.
5. In the **Upcoming Cost** field, select the date, from which the item will become active for this location.

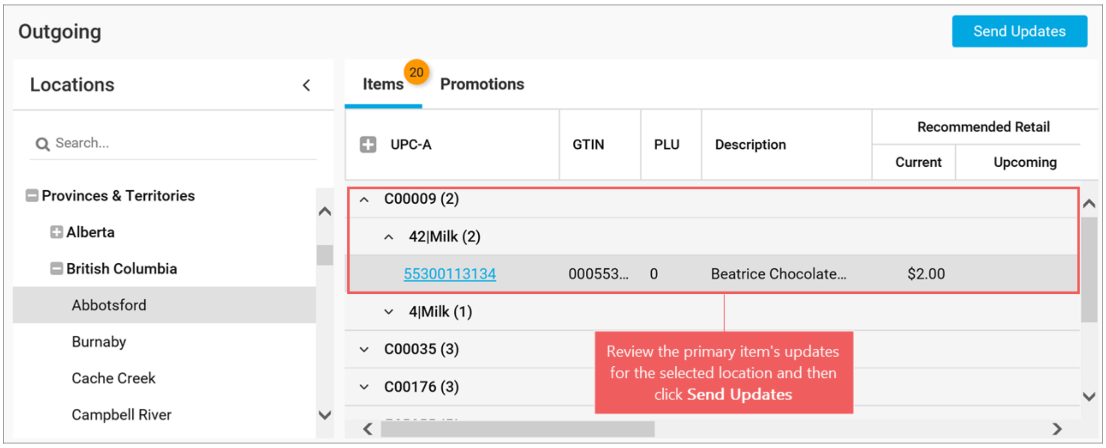


6. At the top right of the item settings window, click **Done**.

   Result: The information about the date of the item's activation is added to the **Status** column.

3. Go to **Updates Manager** > **Outgoing**.
4. In the **Locations** list, select the location with the primary item, for which the linked items are added.
5. In the **Items** list, review updates.

6. At the top right of the **Outgoing** form, click **Send Updates**.



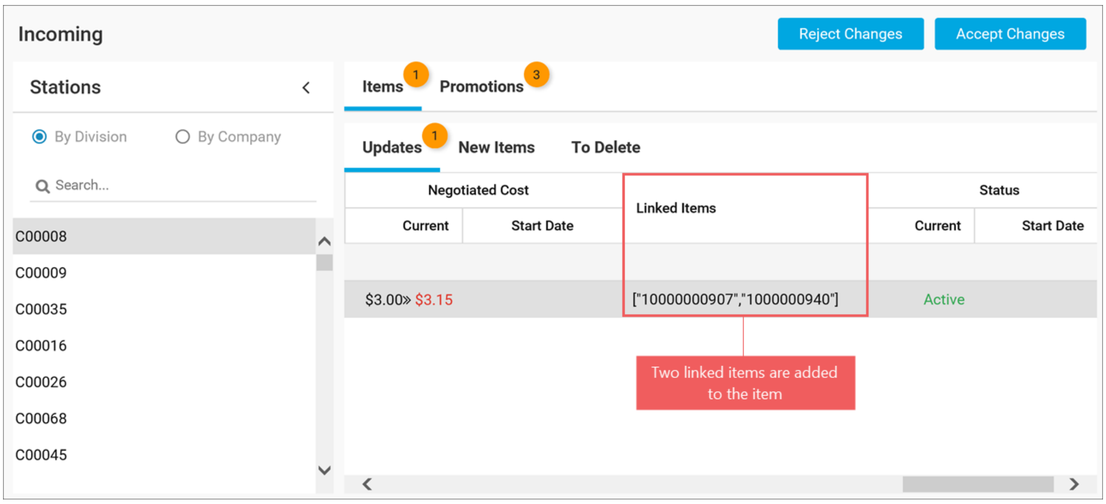
7. In the confirmation window, click **Yes**.
   Result: Primary item updates are sent to the selected location.

Accepting Changes on Location

1. Log in PIM as the Branch Office user with the location account where the items were linked to the primary item.
2. Go to **Updates Manager** > **Incoming**.
3. In the **Stations** list, select the location with the primary item's updates.
4. In the **Items** list, review updates.

> The changes are displayed in red color in the Items list.

5. At the top right of the Incoming form, click **Accept Changes**.

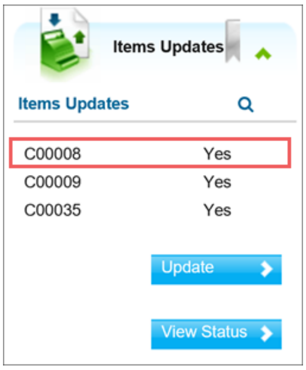


6. In the confirmation window, click **Yes**.
   Result: The primary item's updates are accepted on the selected location.

Sending Linked Items Updates to Cash Register

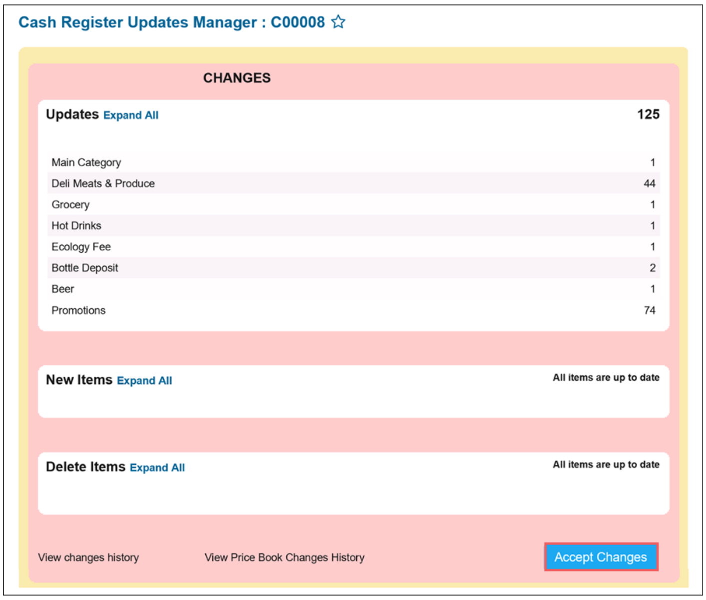
To send updates on the added linked items to the primary item on your location, follow the steps:

1. Log in CStoreOffice® as the Branch Office user with the location account where the items were linked to the primary item and the changes were accepted in PIM.
2. Move the CStoreOffice® home page to the **Items Updates** section.
3. In the **Items Updates** section, click the station with the linked items updates.



Result: The **Cash Register Updates Manger** opens in a new window.

4. In the **Cash Register Updates Manager**, do the following:
   a. Go to the **Changes** section and review items updates.
   b. Move the **Cash Register Updates Manager** page till the **Delete Items** section.
   c. At the bottom right of the **Delete Items** section, click **Accept Changes**.



Result: The primary item's updates are sent to the location cash register.

Managing Items at Location Tags Level

By default, the **Sales and Retail** tab lets you manage item data individually for every location. If necessary, you can manage item data for locations grouped by tags. This option can be helpful if you use tags to categorize locations in CStoreOffice®. In this case, you can view and set up prices for a group of locations having the same tag at once.

To work with sales and retail prices at the location tags level, you can perform the following actions:

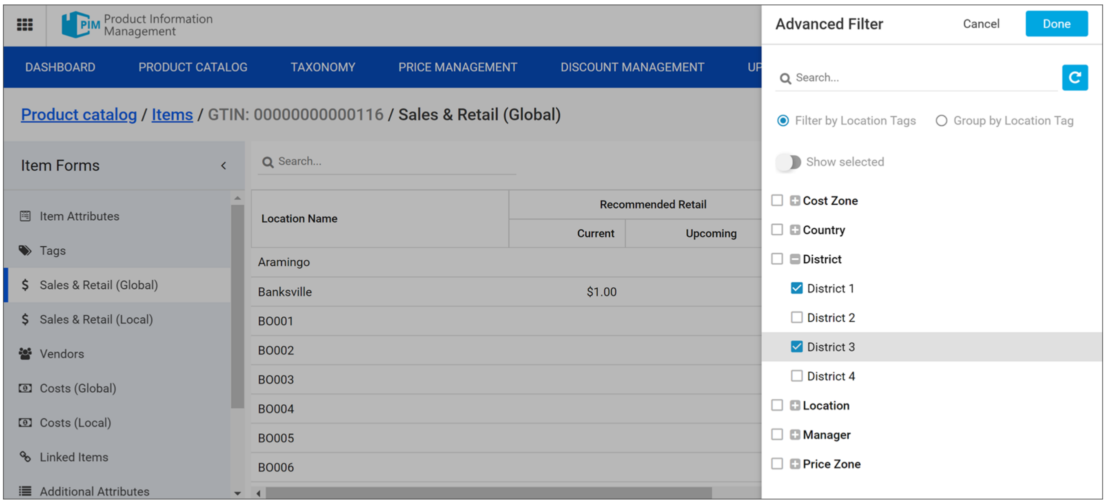
- Switch to the Subtotal by Tag mode
- Analyze prices in locations grouped by tags
- Analyze item status in locations grouped by tags
- Set up prices at the location tags level

Switching to Subtotal by Tag Mode

If you want to present sales and retail prices at the location tags level, you need to switch to the Subtotal by Tag mode.

To switch to the Subtotal by Tag mode, follow the steps:

1. Go to **Product Catalog** > **Items**.
2. In the items list, select the necessary item and click **Edit**.
3. Click the **Sales and Retail** tab.
4. At the top right corner of the **Sales and Retail** view, click **Advanced Filter**.
5. In the filter pane, select one of the following options:
    - **Filter by Location Tags**: Select the check boxes next to location tags by which locations must be filtered.
    - **Group by Location Tag**: Select the location tag by which locations must be grouped.
6. At the top right corner of the filter pane, click **Done** to apply the filter.
   Result: Locations on the **Sales and Retail** tab are grouped by the selected root tag.



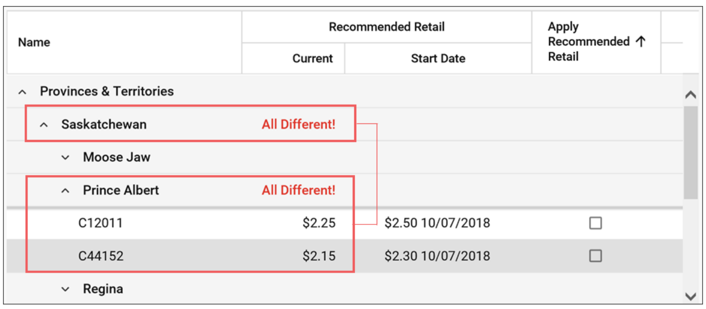
Analyzing Prices in Locations Grouped by Tags

In the Subtotal by Tag mode, price data is presented for location tags, not for individual locations. For example, if you select to display price data for locations grouped by the Provinces tag, PIM will present prices for different provinces and territories.

A location tag is assigned to multiple locations, and an item can have different prices in these locations. For this reason, when you switch to the Subtotal by Tag mode, PIM checks the **Recommended Retail** field for locations grouped by tags. During the check, PIM analyzes price values for locations at the lowest level of the tag hierarchy and compares them. Depending on the obtained results, PIM displays price data in the following way:

- If the recommended retail prices for locations are the same, the price value at the tag level is marked black.
- If the recommended retail prices for locations are not the same, PIM determines the most popular price and displays this price marked red at the tag level.
- If the recommended retail prices for all locations are different, PIM displays the **All different!** value marked red at the tag level.

Warnings about different prices are propagated to upper levels of the tags hierarchy. For example, if the tags hierarchy has two levels and different prices are detected at the lowest level, warnings about different prices are displayed at both levels of the tag hierarchy.



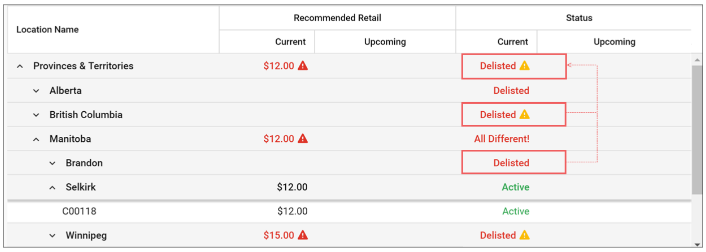
Analyzing Item Status in Locations Grouped by Tags

In the Subtotal by Tag mode, you can view the current item status for locations groped by tags. You can use this option to quickly identify what status the item has in a group of locations. For example, you can check if the item is active in all locations having the same territory tag.

A location tag is assigned to multiple locations, and an item can have different statuses in these locations. For this reason, when you switch to the Subtotal by Tag mode, PIM checks the **Status** field for locations grouped by tags. During the check, PIM analyzes the item status values for all locations. Depending on the obtained results, PIM displays item statuses at the tags level in the following way:

- If the item statuses for locations are the same, the status at the tag level is marked green.
- If the item statuses for locations are not the same, PIM determines the most popular status and displays this status marked red at the tag level. Next to this status, PIM displays a warning icon.
- If the number of active statuses is equal to the number of inactive statuses, PIM displays the **All different!** value marked red at the tag level. Next to the value, PIM displays a warning icon.

Warnings about different statuses are propagated to upper levels of the tags hierarchy. For example, if the item has the Delisted status in most locations, the Delisted value will be displayed at the root tag level.



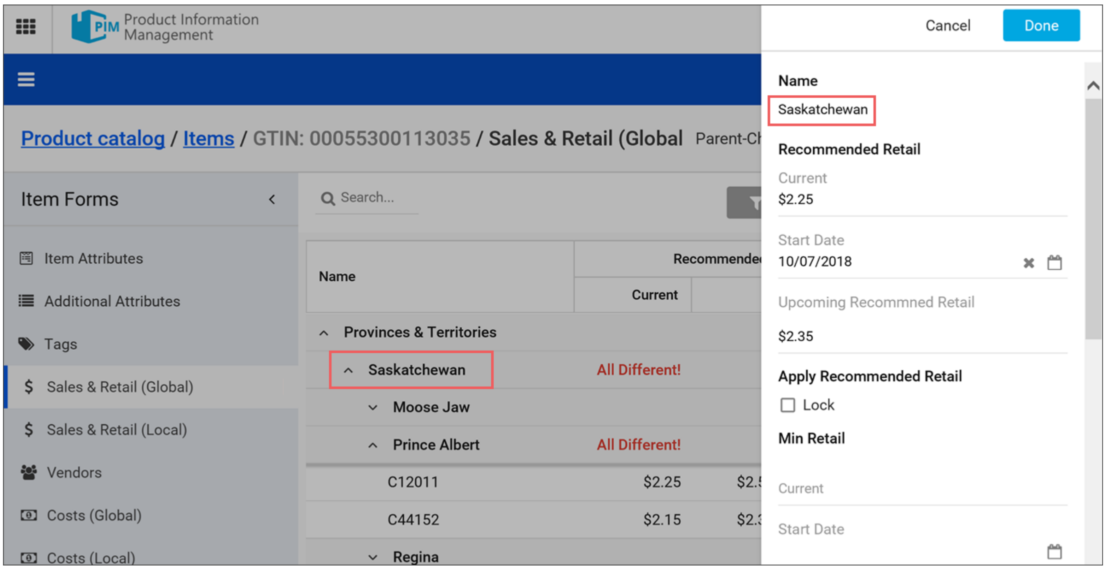
Setting Up Prices at Location Tags Level

You can set up sales and retail prices at the location tags level. In this case, the specified price value is applied to all locations to which a certain tag is assigned.

To specify prices at the location tags level, follow the steps:

1. Go to **Product Catalog** > **Items**.
2. In the items list, select the necessary item and click **Edit**.
3. Click the **Sales and Retail** tab.
4. At the top right corner of the **Sales and Retail** view, set the **Subtotal by Tag** toggle to the On position.
5. Click the **Group By Tag** button and select the check box next to the root tag by which you want to group locations. You can select only one tag at once.

6. Double-click the row of the necessary tag.
7. In the displayed window, specify the following parameters:
   - **Recommended Retail** - the purchase price recommended by the account owner.
   - **Apply Recommended Retail** - select this option if you want to forbid the recommended retail price change at the locations to which the tag is assigned.
   - **Min Retail**: The least possible retail price value for locations to which the tag is assigned.
   - **Max Retail**: The greatest possible retail price value for locations to which the tag is assigned.
   - **Negotiated Cost**: The originally agreed price with the vendor.
8. At the top of the window, click **Done** to save the changes.



Setting Up Taxes and Product Codes

In PIM, you can set up taxes and product codes for items in bulk using location tags. Taxes and product codes can be set up at the following levels:

- **At the CR department level**. This scenario can be helpful if you want to set product codes and taxes for CR departments in different locations at once. For more details, see Setting Up Taxes and Product Codes for CR Departments.
- **At the item level in bulk**. This scenario can be helpful if you want to set the product code and taxes for items in different locations at once. For more details, see Setting Up Taxes and Product Codes for Items in Bulk.

Setting Up Taxes and Product Codes for CR Departments

In PIM, you can set up the product code and taxes attributes at the CR department level in bulk. This method can be helpful if you need to set up attributes for CR departments in a number of locations at once.

For setting up product codes and taxes at the CR department level in bulk, PIM leverages location tags. For example, you need to set up taxes for some CR department in several locations on the same territory. In this case, you can create a territory location tag and categorize your locations using this tag. In PIM, you will be able to select a group of these locations by the location tag and configure the tax settings at the CR department level for all locations from this group in bulk.

> To be able to set up the product codes and taxes at the CR department level, the user must have the CR Department Attribute Management permission.

To set up product codes and taxes at the CR department level in bulk, you need to perform the following activities:

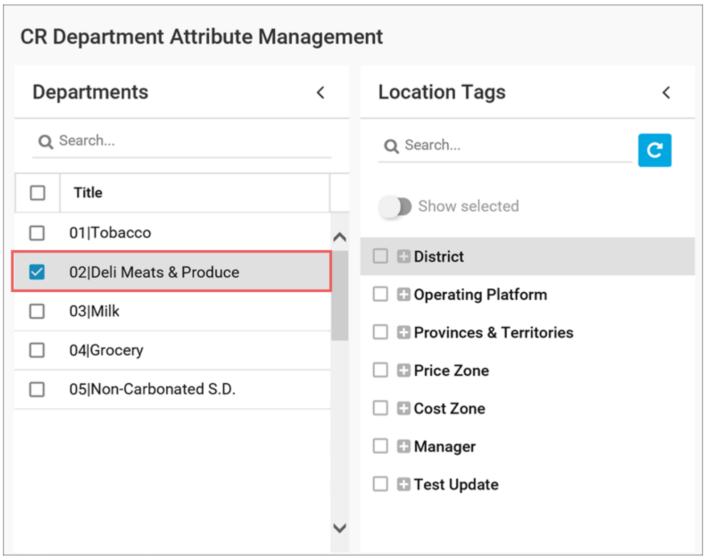
1. Select one or more CR departments for which you need to set up product codes or taxes.
2. Select a location tag by which you want to set up product codes or taxes.
3. Set up product codes or taxes by the location tag.

Selecting CR Departments

You need to select CR departments for which you want to set up product codes or taxes. You can set up product codes and taxes for one CR department or several CR departments at once.

To select one or more CR departments for product codes and taxes setup, follow the steps:

1. Go to **Taxonomy** > **CR Department Attribute Management**.
2. In the **Departments** pane, select check boxes next to one or more CR departments for which you want to set up product codes or taxes.

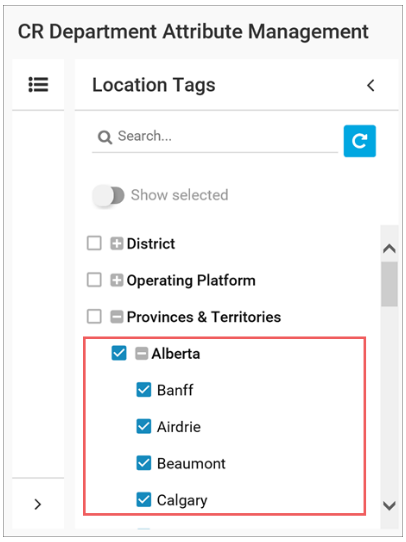


Selecting Locations by Location Tags

You need to select a location tag by which you want to set up product codes or taxes at the CR department level.

To select a location tag, follow the steps:

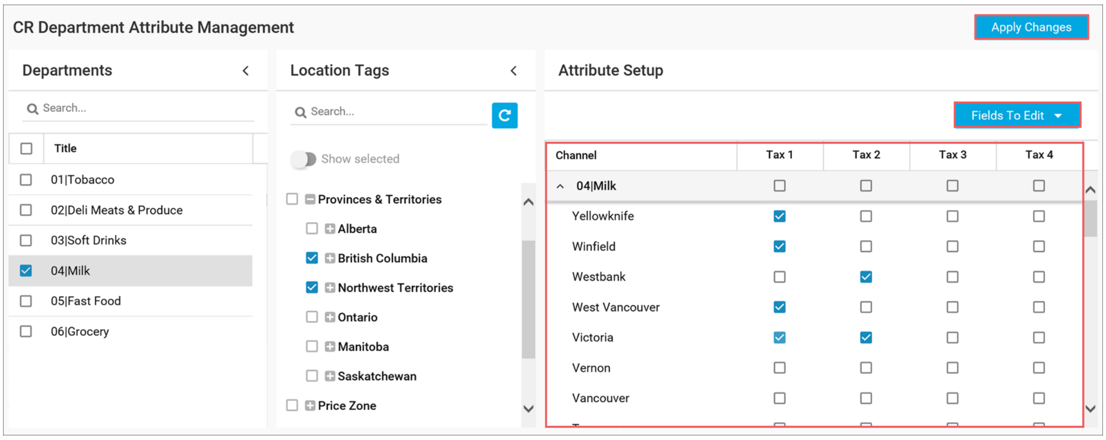
1. On the **CR Department Attribute Management** form, in the **Location Tags** pane, expand the tags tree.
2. Select check boxes next one or more tags by which you want to set up product codes or taxes.



Setting Up Product Codes and Taxes

To set up the product code or taxes for CR departments by the selected location tag, follow the steps:

1. On the right of the **Attribute Setup** pane, click the **Fields to Edit** button and select the attribute for which you want to specify values: **Taxes** to **Product Code**.
2. In the **Attribute Setup** pane, click the arrow icon next to the necessary CR department to expand the list of locations.
3. In the displayed fields, set up the attribute values:
   - For product code: in the **Product Code** field, specify the necessary product codes for all locations in the list.
   - For taxes: in the taxes fields, select the check boxes for taxes that must be applied to items in the CR department.
4. At the top right corner of the **CR Department Attribute Management** form, click the **Apply Changes** button.



Result: The specified attribute values (product code or taxes) are updated for the selected CR department(s) in the locations having the selected location tag(s).

Setting Up Taxes and Product Codes for Items in Bulk

In PIM, you can set up product codes and taxes for items in bulk. This method can be helpful if you need to set up the same product code and taxes for items in a number of locations at once.

For setting up product codes and taxes in bulk, PIM leverages location tags. For example, you have several locations in the same province and need to set up the same tax settings for a specific item in these locations. In this case, you can create a province location tag and categorize your locations using this tag. In PIM, you will be able to select a group of these locations by the location tag and configure the same tax settings for this group simultaneously.

To be able to set up the product codes and taxes for items in bulk, the user must have the CR Department Attribute Management permission.

To set up product codes and taxes for items in bulk, you need to perform the following activities:

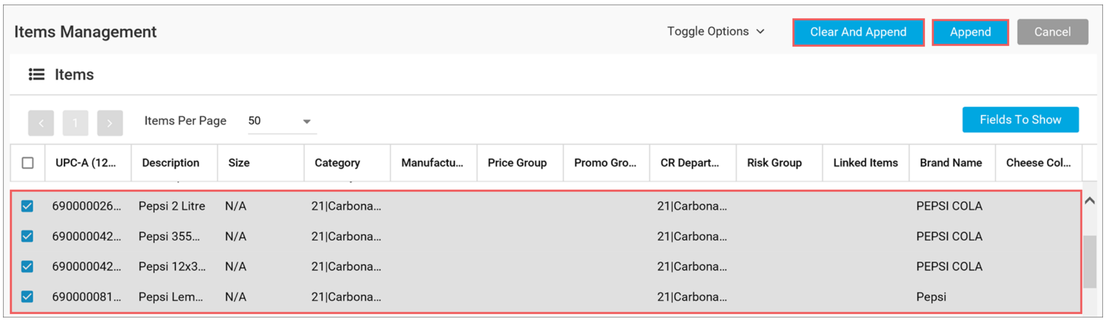
1. Select one or more items for which you need to set up the product code or taxes.
2. Select a location tag by which you want to set up the product code or taxes.
3. Set up the product code or taxes by the location tag.

Selecting Items

You need to select items for which you want to set up the product code or taxes. You can set up the product code and taxes for one item or a group of items at once.

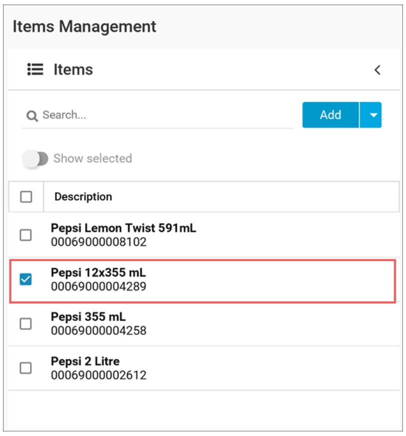
To select one or more items for product code and taxes setup, follow the steps:

1. Go to **Product Catalog** > **Items Management**.
2. In the **Items** pane on the left, click the **Add** button.
3. In the displayed **Items** form, use the Find tool to find the necessary items.
4. In the displayed list of items, select the check boxes next to the items for which you want to set up the product code or taxes.
5. At the top right corner of the **Items** form, click the **Append** button.
   If you want to remove the previously added items from the list in the **Items** pane, click the **Clear and Append** button.



6. The selected items are added to the list in the **Items** pane. Select the check boxes next to the

items for which you want to set up the product code or taxes.

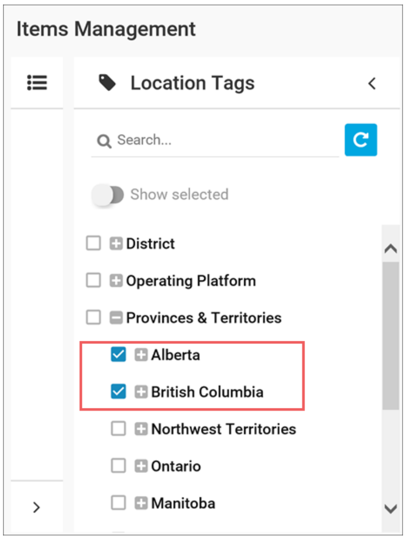


Selecting Locations by Location Tags

After you have added items to the items list, you need to select a location tag by which you want to set up the items product code or taxes.

To select a location tag, follow the steps:

1. In the **Items Management** form, in the **Location Tags** pane, expand the tags tree.
2. Select check boxes next one or more tags by which you want to set up the items product code or taxes.



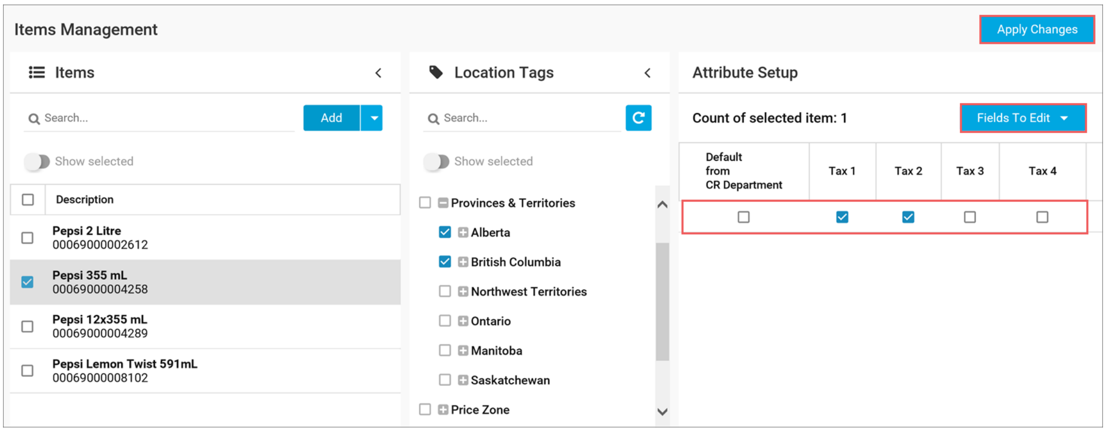
Setting Up Product Codes and Taxes

To set up the product code or taxes for item(s) by the selected location tag, follow the steps:

1. To the right of the **Attribute Setup** pane, click the **Fields to Edit** button and select the attribute for which you want to specify values: **Taxes** to **Product Code**.
2. In the displayed fields, set up the attribute values:

- For product code: in the **Product Code** field, specify the necessary product code.
  If you want to use the product code specified at the CR department level, select the **Default from CR Department** check box on the left.
- For taxes: in the taxes fields, select the check boxes for taxes that must be applied to the item (s).
  If you want to apply taxes specified at the CR department level, select the **Default from CR Department** check box on the left.
  For more details, see Setting Up Taxes and Product Codes for CR Departments.

3. At the top right corner of the **Items Management** form, click the **Apply Changes** button.



Result: The specified attribute values (product code or taxes) are updated for the selected item(s) in the locations having the selected location tag(s).

Working with Car Wash Items

If your branch offices offer the car wash service to customers, as a Head Office Manager, you need to set up car wash items in PIM. The car wash items settings must be configured in a way so that they can interface with the car wash controllers in the branch offices.

> The car wash items functionality is supported only for Bulloch and Radiant cash registers.

In PIM, you can perform the following activities with car wash items:

- Create car wash items in the Product Catalog.
- Set up the controller code and sales location in bulk.

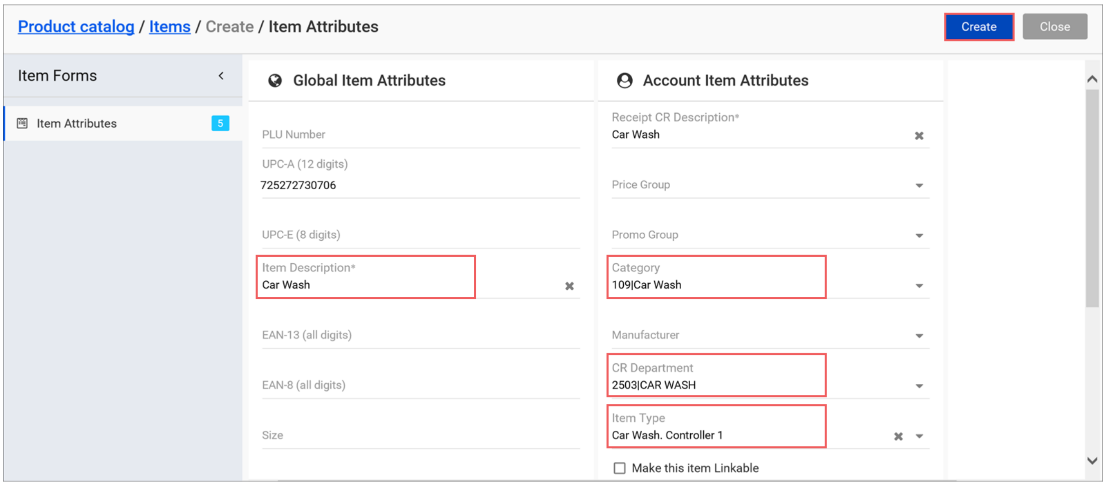
Creating Car Wash Items

Before creating car wash items, make sure that the following prerequisites are met:

- Bulloch or Radiant cash registers are used in branch offices where the car wash service is offered.
- A Car Wash category is created in CStoreOffice®.
- A Car Wash CR department is created in CStoreOffice®.

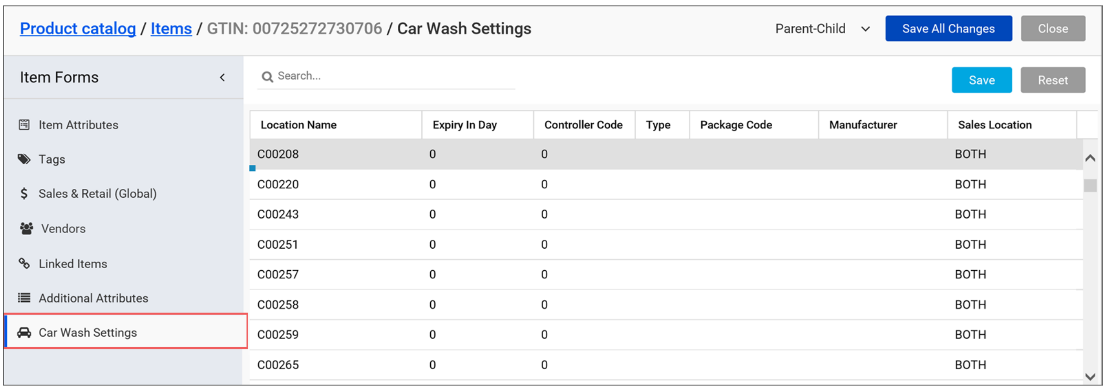
To create a car wash item in PIM, follow the steps:

1. Go to **Product Catalog** > **Items**.
2. At the top right corner of the **Items** form, click **Add New**.
3. Configure the item settings as required. For more details, see Creating New Item.
4. In the **Category** list, select the Car Wash category.
5. In the **CR Department** list, select the Car Wash department.
6. (For Radiant cash registers) In the **Item Type** list, select the item type according to the Radiant classification.
7. At the top of the **Item** form, click the **Create** button.

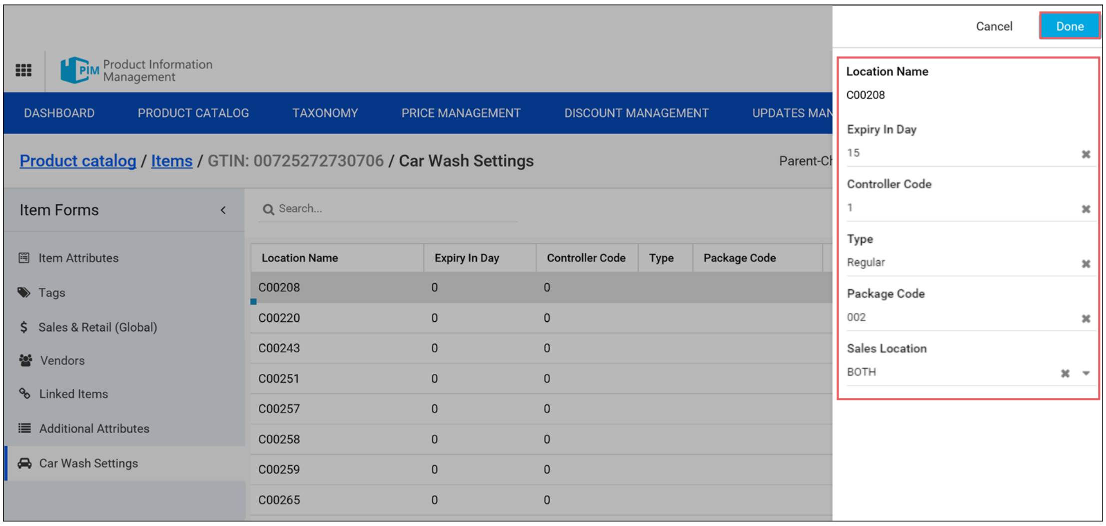


8. To the left of the **Item** form, click **Car Wash Settings**.

   Result: The list of car wash settings for stations opens.



9. To configure car wash settings for a specific station, double-click the corresponding row in the list and define the next settings:
   a. In the **Expiry in Day** field, specify the number of days for which the car wash service provided with the item must be active.
   b. In the **Controller Code** field, specify the code for the car wash controller with which the item must interface.
   c. In the **Type** field, enter the car wash type.
   d. In the **Package Code** field, enter the car wash package code.
   e. In the **Sales Location** list, select one of the following values for the car wash sales location:
      - **BOTH**: If the car wash item must be sold inside, at the POS, and outside, at the pump. This value is selected by default.
      - **INSIDE**: If the car wash item must be sold only at the POS.
   f. When finished, at the top of the window, click the **Done** button.



Setting Up Controller Code and Sales Location in Bulk

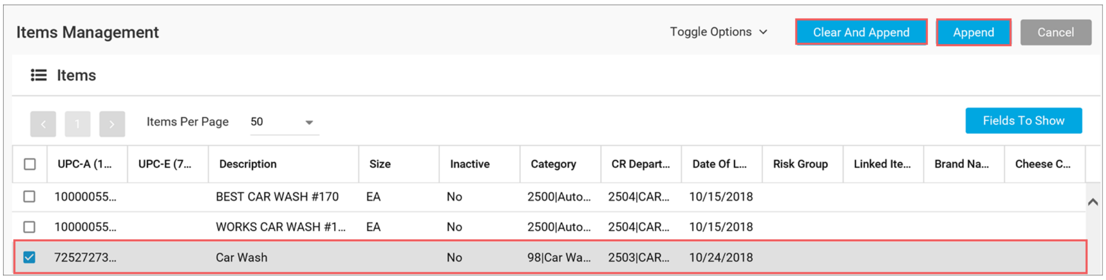
In PIM, you can configure the car wash controller code and sales location settings for car wash items in bulk. This method can be helpful if you need to set up the controller code and sales location for a number of stations at once.

To set up the car wash controller code and sales location for car wash items in bulk, follow the steps:

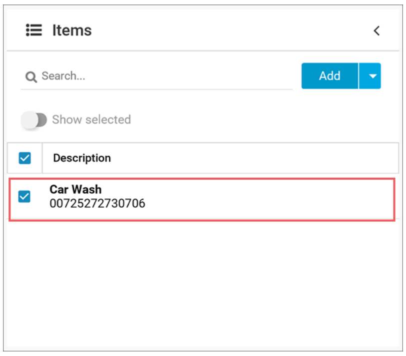
1. Go to **Product Catalog** > **Items Management**.
2. In the **Items** pane on the left, click the **Add** button.
3. In the displayed **Items** form, use the Find tool to find the necessary car wash items.
4. In the displayed list of items, select the check boxes next to the items for which you want to set up the car wash controller code and sales location.

5. At the top right corner of the **Items** form, click the **Append** button.

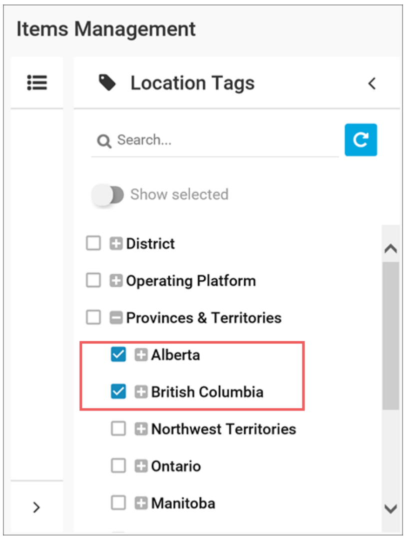
   If you want to remove the previously added items from the list in the **Items** pane, click the **Clear and Append** button.



6. The selected items are added to the list in the **Items** pane. Select the check boxes next to the items for which you want to set up the controller code and sales location.



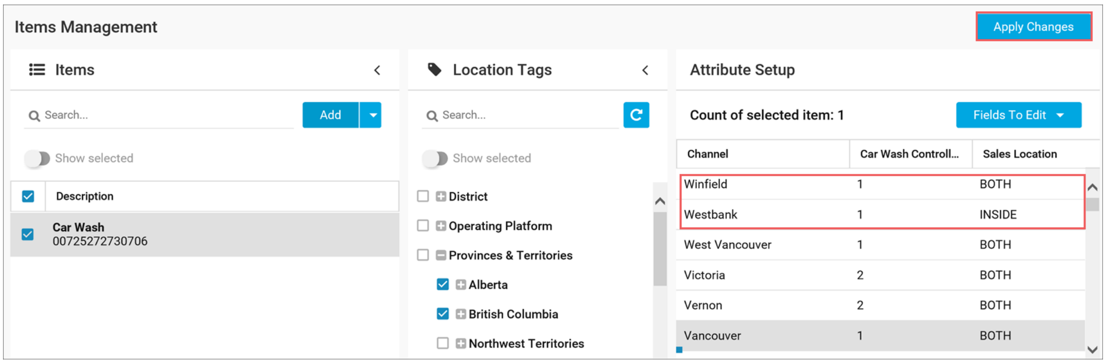
7. In the **Location Tags** pane, expand the tags tree and select the check boxes next to one or more tags by which you want to configure car wash settings.



8. On the right of the **Attribute Setup** pane, click the **Fields to Edit** button and select **Car Wash Settings**.
9. In the displayed fields, set up the car wash settings:

- In the **Car Wash Controller Code** field, enter the code of the car wash controller with which the car wash item must interface.
- In the **Sales Location** list, select where the car wash item can be sold:
  - **BOTH**: if the car wash item must be sold inside, at the POS, and outside, at the pump.
  - **INSIDE**: if the car wash item must be sold only at the POS.

10. At the top right corner of the **Items Management** form, click the **Apply Changes** button.



Result: The specified car wash settings are updated for the selected item(s) in the locations having the selected location tag(s).

Working with Vendors

If you purchase the same item from more than one vendor, you can define vendors with whom you will be trading in the **Item** form. You can then set up the item cost for each vendor in different locations. When you send updates to distribution channels using the Updates Manager, the specified vendor costs for the item will be stored in the Location and Account Price Books of the subscribers accounts and locations.

To set up vendor data and costs in PIM, you need to perform the following activities:

1. Add vendors with whom you will be trading.
2. Set up the item costs for locations.
3. Send updates to locations.

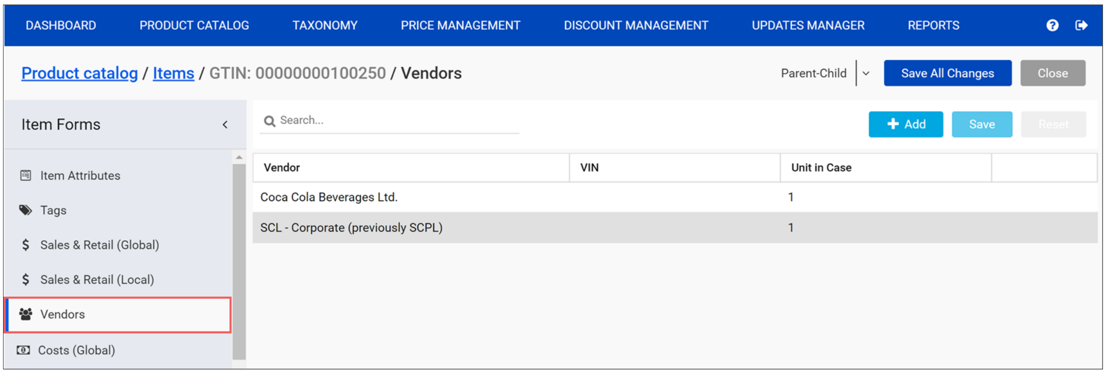
Adding Vendors

In the **Items** form, you can add vendors from whom you are planning to purchase the item.

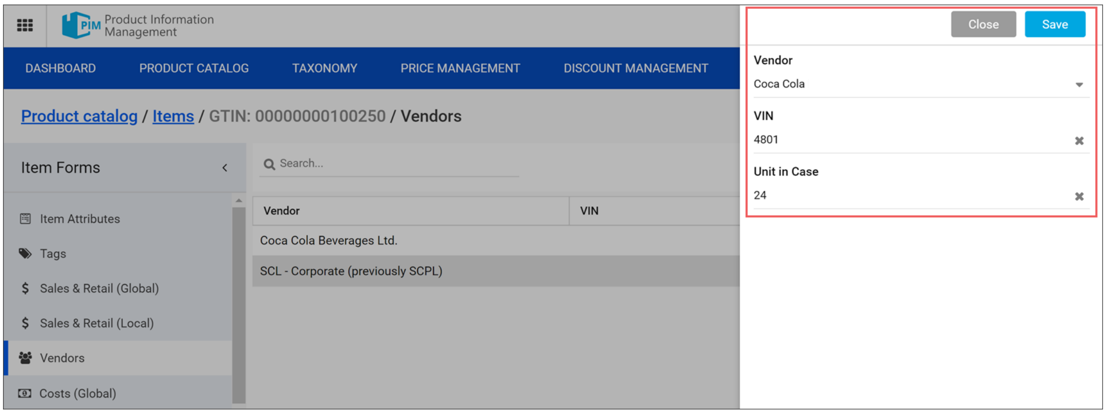
To add vendors of a specific item in PIM:

1. Go to **Product Catalog** > **Items**.
2. In the **Items** form, use the Find and Replace tool to find the necessary item.
3. In the items list, select the item for which you want to add vendors and click **Edit**.

4. In the left menu, select **Vendors**.



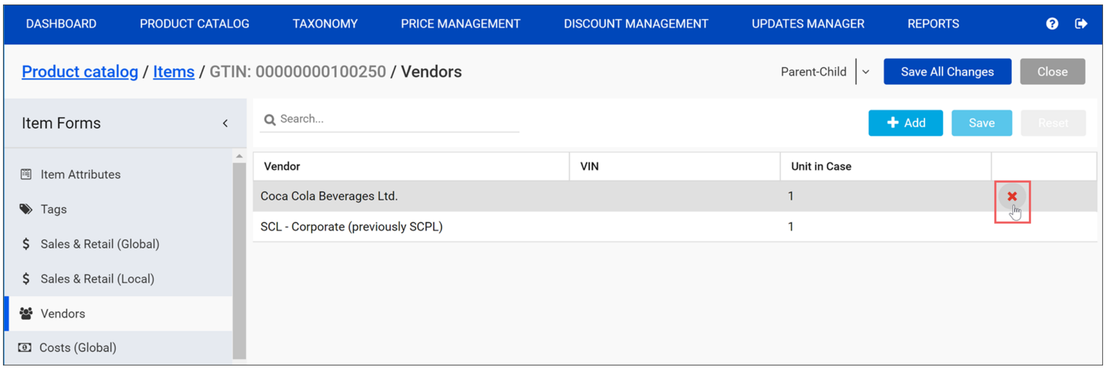
5. At the top right corner of the **Vendors** view, click **Add** and specify the following settings for the vendor:
   a. From the **Vendor** list, select the necessary vendor. To quickly find the vendor, start typing its name in the field. PIM will display all variants matching the entered name.
   b. In the **VIN** field, enter the vendor identification number. This is a number that uniquely identifies the item in the vendor's system. The VIN is provided by the vendor.
   c. In the **Unit in Case** field, enter the quantity of the item in the packing.
   d. At the top right corner of the pane, click **Save** to save the vendor data.



To edit vendor's data, in the vendors list, double-click the vendor and change the settings as required.

To delete a vendor, in the vendors list, hover the cursor over the necessary line and to the right of the line, click the **Delete** icon. When you delete a vendor, PIM removes all cost values that are already set up in locations for this vendor.

> If some subscriber location has invoices from the VIN or vendor, the vendor will not be deleted.

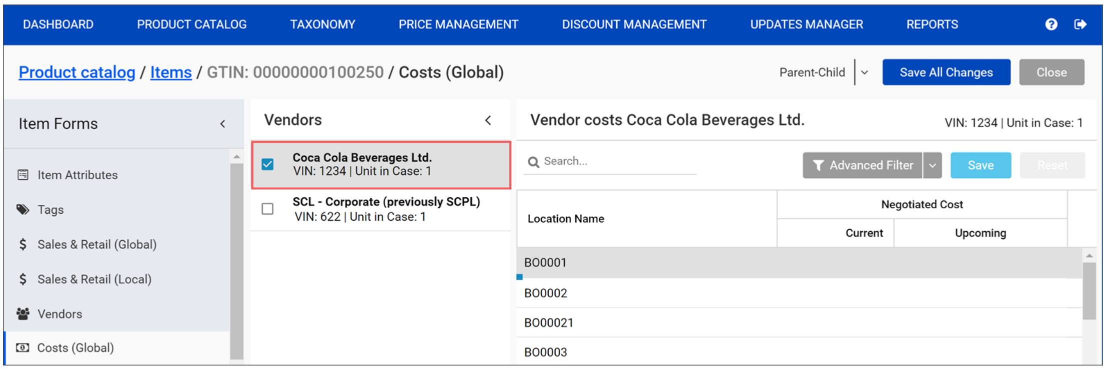


Setting up Item Costs for Locations

You can set up separate cost for an item by a specific vendor for different locations.

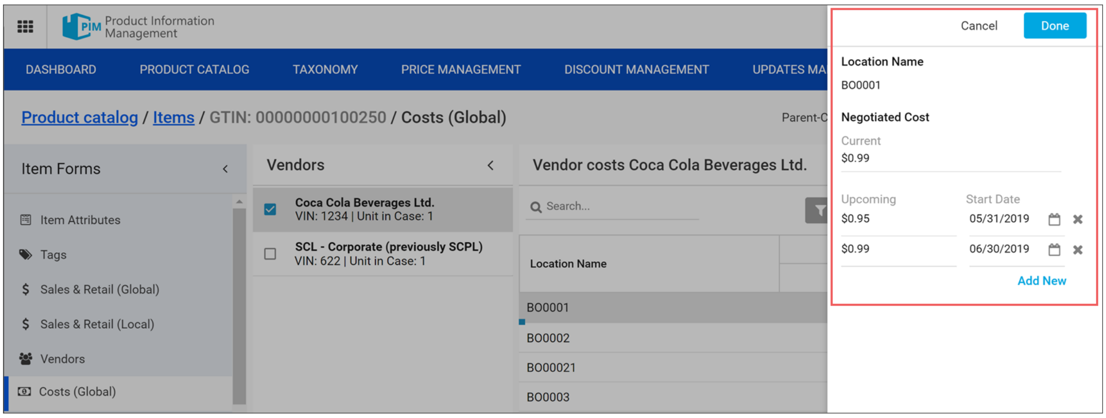
To set up the item cost for a location:

1. In the **Item** form, in the left menu, select **Costs (Global)**.
2. In the **Vendors** list, select the check box next to the vendor whose cost you want to set up.



3. In the locations list, double-click the location for which you want to set up the cost.
   To quickly find the necessary location, use the search field at the top of the locations list or filtering and grouping options. For details, see Filtering and Grouping Locations.
4. Specify the following cost settings:
   a. In the **Current** field, specify the current item cost.
   b. In the **Upcoming** field, specify the upcoming cost for the item.
   c. In the **Start Date** field, specify the date from which the upcoming cost will be in effect.
   d. To add one more pair of upcoming cost and date values, at the bottom of the pane, click **Add**. Then specify the upcoming cost settings as required.
   e. If the vendor must be set as primary for the location, select the **Primary Vendor** check box.

f. At the top right corner of the pane, click **Done** to save the cost data.



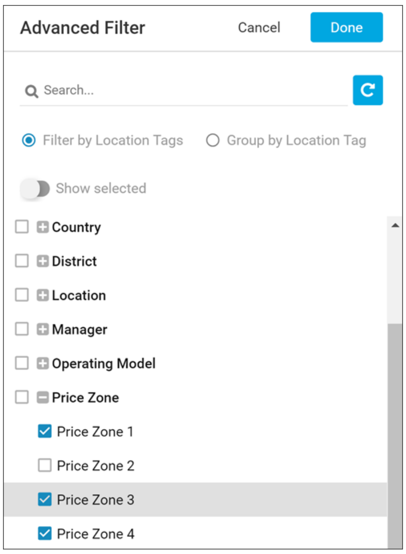
Filtering and Grouping Locations

To facilitate the cost setup, you can:

- Filter locations by one or more location tags: In this case, only locations to which a specific location tag is assigned will be displayed in the locations list.
- Group locations by a location tag: In this case, locations will be displayed as groups in the locations list.

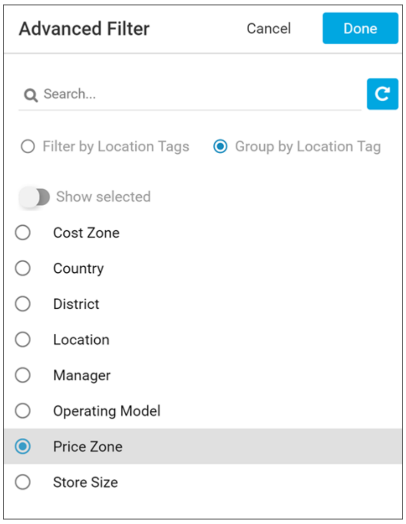
To filter locations by location tags:

1. In the **Costs (Global)** view, click **Advanced Filter**.
2. In the filter pane, select **Filter by Location Tags**.
3. Select the check boxes next to location tags by which locations must be filtered.
4. At the top right corner of the filter pane, click **Done** to apply the filter.

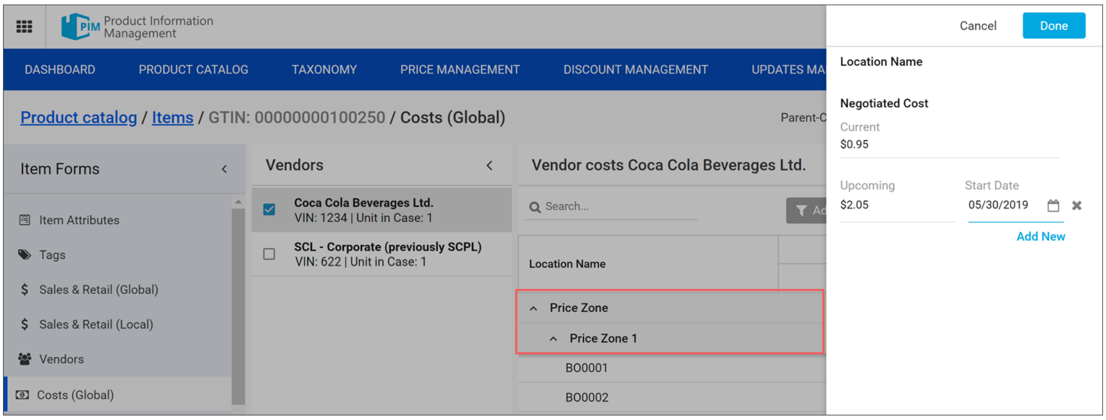


To group locations by a location tag:

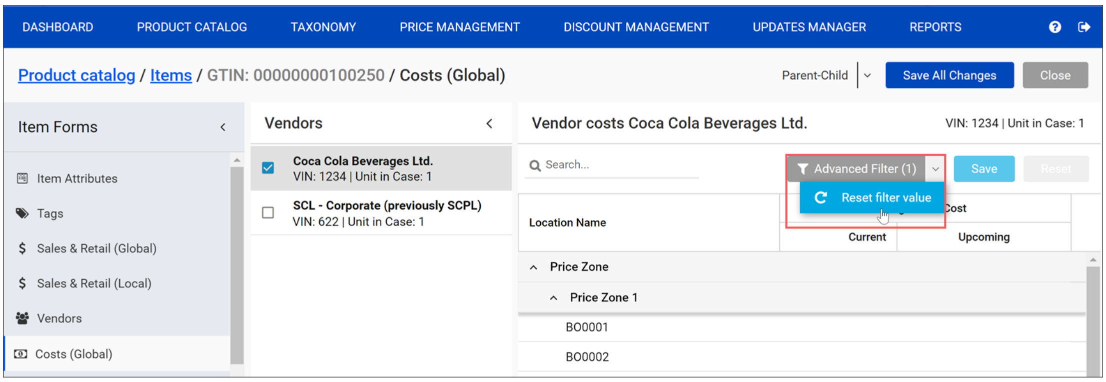
1. In the **Costs (Global)** view, click **Advanced Filter**.
2. In the filter pane, select **Group by Location Tag**.
3. Select the location tag by which locations must be grouped.
4. At the top right corner of the filter pane, click **Done** to apply the filter.



After you have filtered or grouped locations by location tags, you can proceed with cost setup in the usual way: click the necessary location or group in the list and specify the cost settings as required.



To discard the filter, to the right of the **Advanced Filter** button, click the arrow icon and select **Reset filter value**.

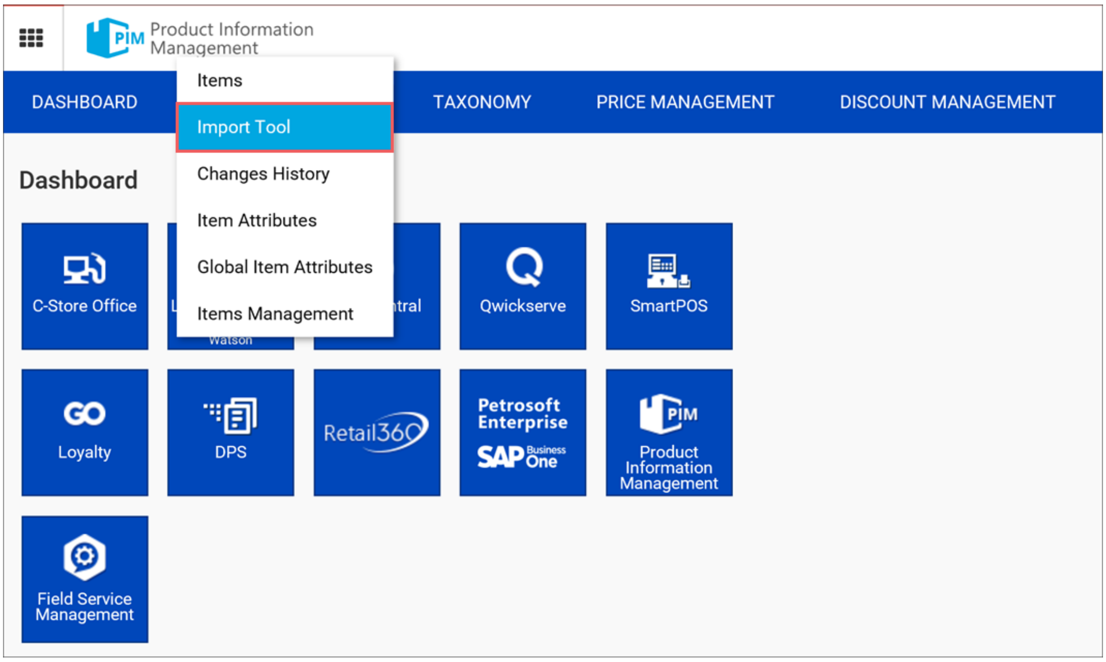


Sending Updates to Locations

After you set up the vendor data and costs, HO and BO managers need to approve these changes in the **Outgoing** and **Incoming** modules of PIM. The changes are then sent to the Updates Manager in CStoreOffice®, where they can be accepted manually or automatically, depending on the CStoreOffice® settings, and further sent to cash registers in subscribers locations.

Import Tool

Currently you can import items to PIM via CStoreOffice®. CStoreOffice® offers Import Tool—a powerful utility for setting up the Price Book by importing and configuring all Price Book elements from different sources.



For more information on how to work with Import Tool, do one of the following:

- Go to Petrosoft University Portal > **Import Tool** section.
- Download CStoreOffice® Import Tool Manual from Petrosoft University Portal.

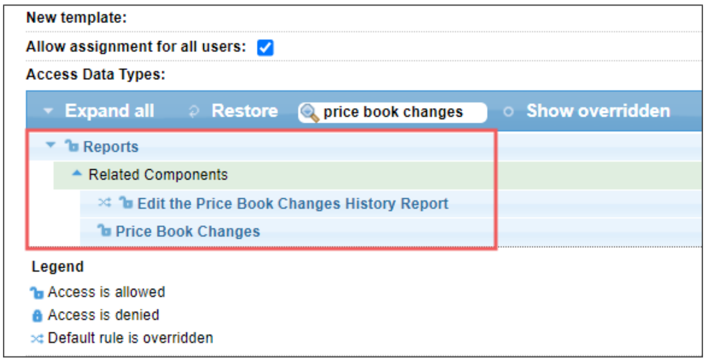
Price Book Changes History Report

This section describes the specifics of accessing and interpreting the Price Book Changes History report.

The report's functionality is permission-based. Before you start working with the report, make sure the following permissions are granted to your users:

- **Price Book Changes**: Grant this permission to the user to allow opening the report and viewing its data.

- **Edit the Price Book Changes History Report**: Grant this permission to the users to allow working with the report and editing its data.



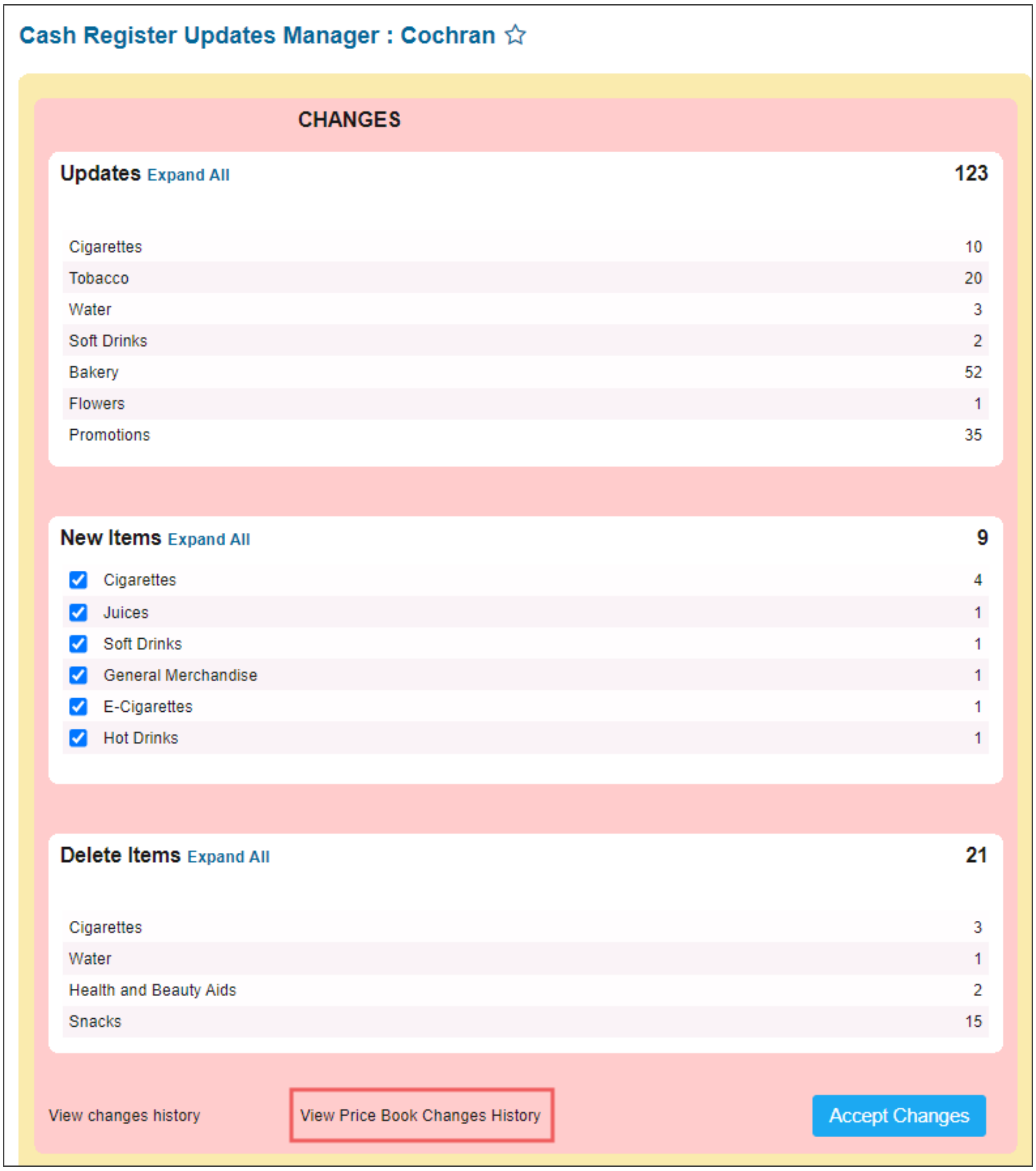
For more information on how to grant a permission to the user, see Roles and Permissions Management.

Opening the Report

You can open the report in one of the following ways:

- Go to **Product Catalog** > **Changes History**.
- From the main CStoreOffice® page, go to **Item Updates**, click your station, in the **Cash Register Updates Manager** form, go to the bottom of the **Changes** section and click **View Price Book**

Changes History.

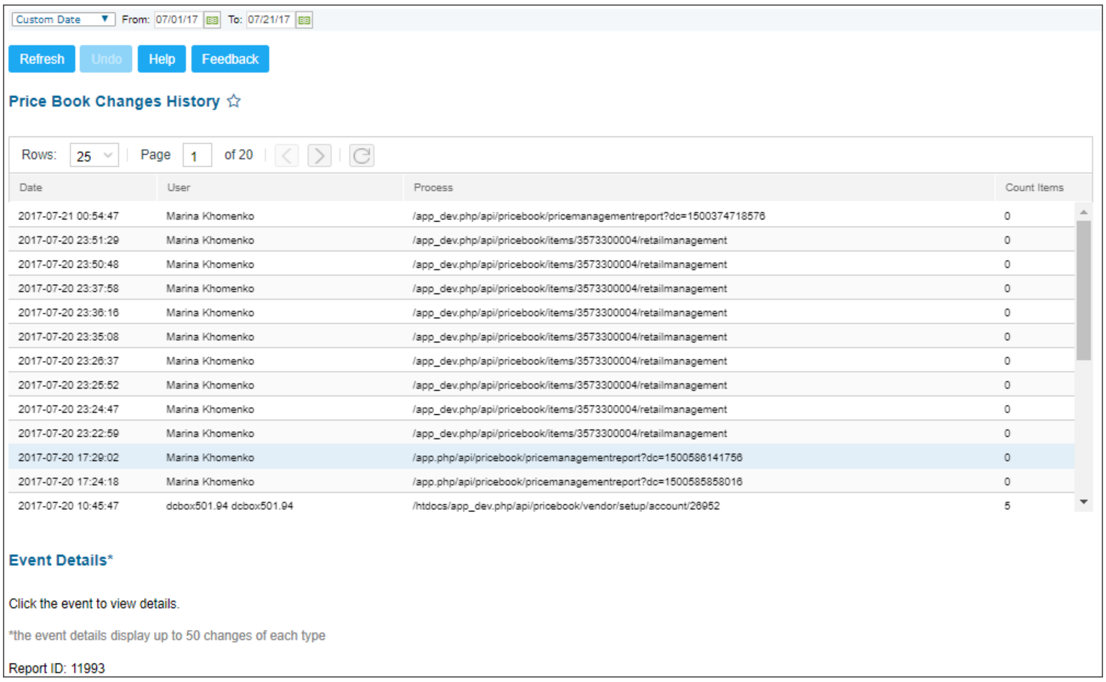


Working with the Report

After opening, the report displays the price book changes made both on the global level and for each separate location. By default, the following event data on the price book changes from the beginning of the current month to the current day is displayed:

- **Date**
- **User**
- **Process**

- **Count Items**



You can perform the following actions with the report:

- Viewing Report for Specific Period
- Viewing More Details on Each Change
- Undoing Changes

Viewing Report for Specific Period

To view the report data for the period you are interested in, select this period manually using calendar or use one of the following filtering options and then click the **Refresh** button:

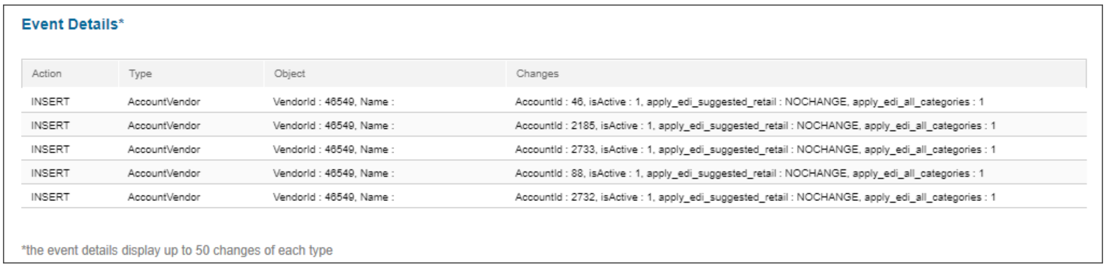
- **Custom Date**
- **Yesterday**
- **Current Month**
- **Current Quarter**
- **Current Year**
- **Last Month**
- **Last Quarter**
- **Last Year**
- **Last 12 Months**

Viewing More Details on Each Change

To view more detailed information for the specific event, in the **Price Book Changes History** table, click the row for this event.

The Event Details table displays the following information:

- **Action**
- **Type**
- **Object**
- **Changes**



Event Details*

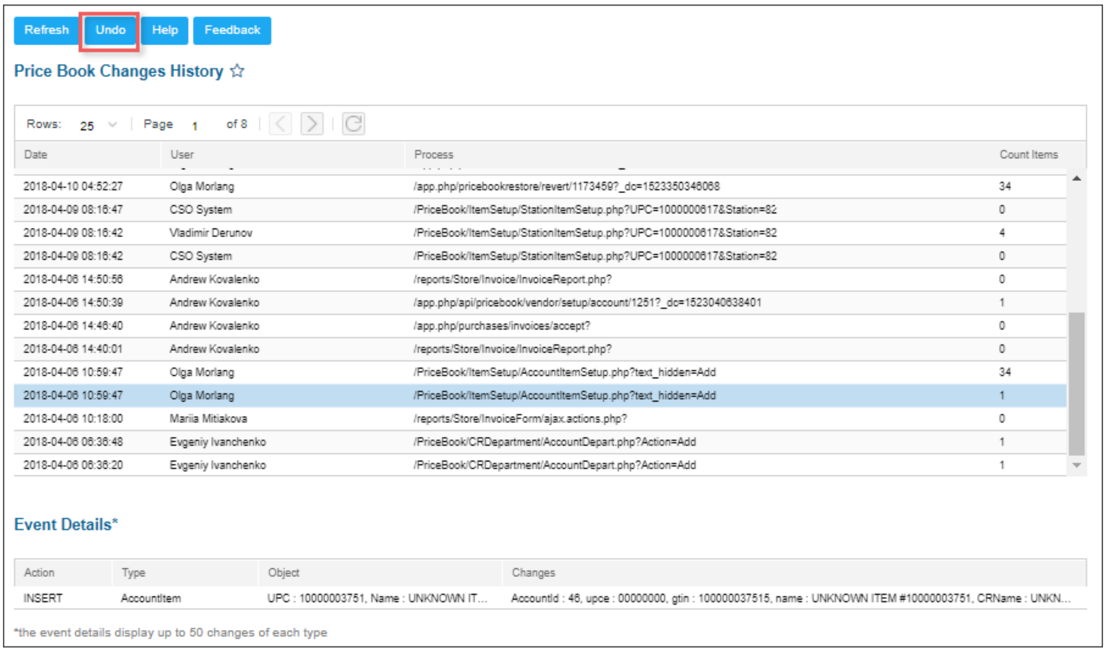
Action	Type	Object	Changes
INSERT	AccountVendor	VendorId : 46549, Name :	AccountId : 46, isActive : 1, apply_edi_suggested_retail : NOCHANGE, apply_edi_all_categories : 1
INSERT	AccountVendor	VendorId : 46549, Name :	AccountId : 2185, isActive : 1, apply_edi_suggested_retail : NOCHANGE, apply_edi_all_categories : 1
INSERT	AccountVendor	VendorId : 46549, Name :	AccountId : 2733, isActive : 1, apply_edi_suggested_retail : NOCHANGE, apply_edi_all_categories : 1
INSERT	AccountVendor	VendorId : 46549, Name :	AccountId : 88, isActive : 1, apply_edi_suggested_retail : NOCHANGE, apply_edi_all_categories : 1
INSERT	AccountVendor	VendorId : 46549, Name :	AccountId : 2732, isActive : 1, apply_edi_suggested_retail : NOCHANGE, apply_edi_all_categories : 1

*the event details display up to 50 changes of each type

Undoing Changes

To undo the price book changes, do the following:

1. In the **Price Book Changes History** table, select any change you need to cancel.
2. At the top of the **Price Book Changes History** table, click the **Undo** button.



Refresh Undo Help Feedback

Price Book Changes History

Rows: 25 | Page 1 of 8

Date	User	Process	Count Items
2018-04-10 04:52:27	Olga Morlang	/app.php/pricebookrestore/revert/1173459?_dc=1523350346068	34
2018-04-09 08:16:47	CSO System	/PriceBook/ItemSetup/StationItemSetup.php?UPC=1000000617&Station=82	0
2018-04-09 08:16:42	Vladimir Derunov	/PriceBook/ItemSetup/StationItemSetup.php?UPC=1000000617&Station=82	4
2018-04-09 08:16:42	CSO System	/PriceBook/ItemSetup/StationItemSetup.php?UPC=1000000617&Station=82	0
2018-04-06 14:50:56	Andrew Kovalenko	/reports/Store/Invoice/InvoiceReport.php?	0
2018-04-06 14:50:39	Andrew Kovalenko	/app.php/api/pricebook/vendor/setup/account/1251?_dc=1523040638401	1
2018-04-06 14:46:40	Andrew Kovalenko	/app.php/purchases/invoices/accept?	0
2018-04-06 14:40:01	Andrew Kovalenko	/reports/Store/Invoice/InvoiceReport.php?	0
2018-04-06 10:59:47	Olga Morlang	/PriceBook/ItemSetup/AccountItemSetup.php?text_hidden=Add	34
2018-04-06 10:59:47	Olga Morlang	/PriceBook/ItemSetup/AccountItemSetup.php?text_hidden=Add	1
2018-04-06 10:18:00	Mariia Mitiakova	/reports/Store/InvoiceForm/ajax.actions.php?	0
2018-04-06 06:36:48	Evgeniy Ivanchenko	/PriceBook/CRDepartment/AccountDepart.php?Action=Add	1
2018-04-06 06:36:20	Evgeniy Ivanchenko	/PriceBook/CRDepartment/AccountDepart.php?Action=Add	1

Event Details*

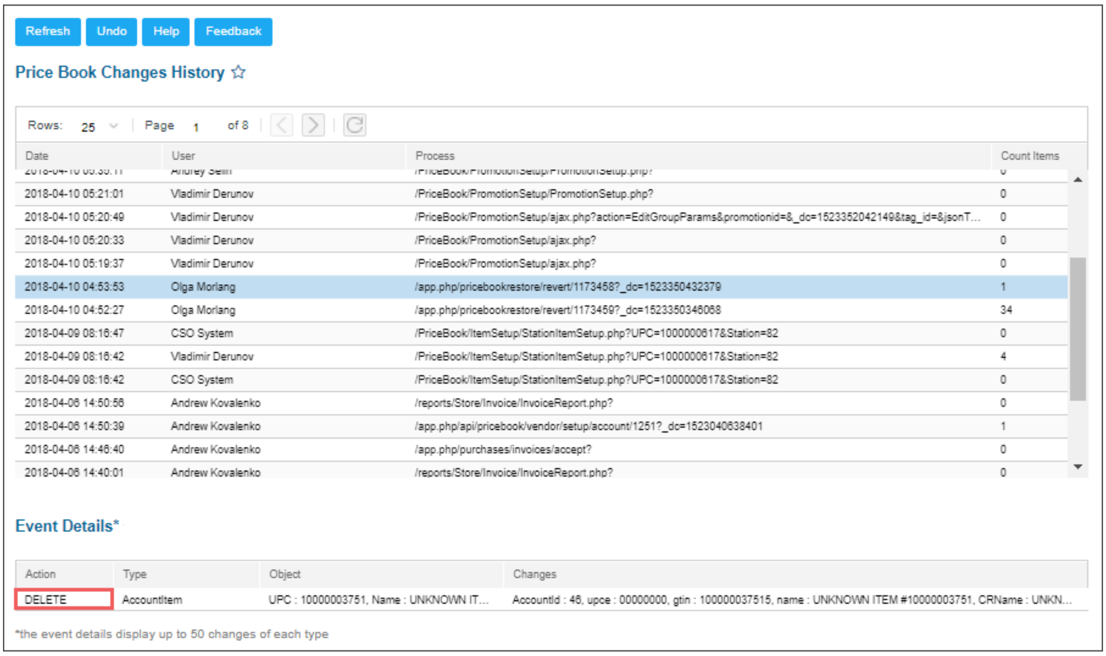
Action	Type	Object	Changes
INSERT	AccountItem	UPC : 10000003751, Name : UNKNOWN IT...	AccountId : 46, upce : 00000000, gtin : 100000037515, name : UNKNOWN ITEM #10000003751, CRName : UNKN...

*the event details display up to 50 changes of each type

3. Wait until the changes are cancelled and corresponding successful message appears.

4. Make sure the changes are cancelled. Refresh the **Price Book Changes History** table, find the cancellation event and then click it.

   Result: The **Event Details** table displays the cancelled event marked as **DELETE** in the **Action** column.



Item Attributes

The Item Attributes menu is available for users with the Head Office role only. For more information on PIM roles, see PIM User Roles.

Item attributes in PIM are divided into the following two groups:

- Account item attributes
- Additional item attributes

ACCOUNT ITEM ATTRIBUTES

Account item attributes are configured during the item's creation. For more details, see Creating New Item.

To view the full list of account item attributes, follow the steps:

1. Go to **Product Catalog** > **Items**.

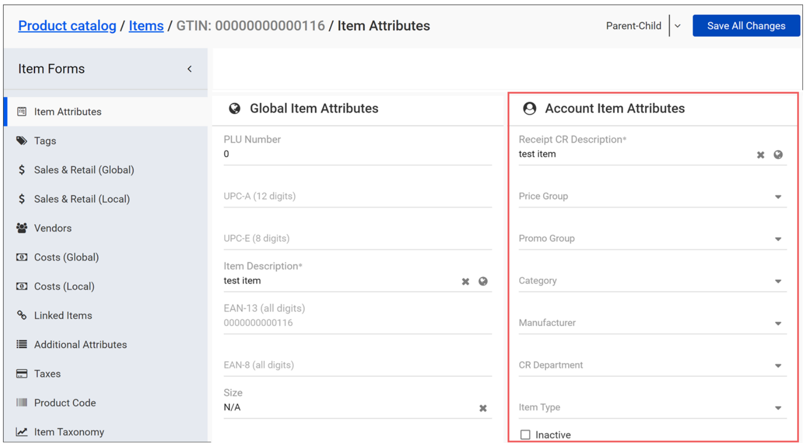
   Result: The **Items** list opens.

2. Search for the item, for which you want to view and/or edit account item attributes.

3. Select the item and then click the **Edit** button.

Result: The item editing form opens.

4. In the item editing form, go to **Item Attributes** > **Account Item Attributes**.



For more information on each account item attribute description, see Account Item Attributes.

ADDITIONAL ITEM ATTRIBUTES

The Account Item Attributes form displays all additional item attributes added from the global item attributes provided by 1WorldSyn.

To configure additional item attributes for the item, go to the item's editing form > Additional Attributes.

You can perform the following operations with the attributes in the Account Item Attributes form:

- Add additional item attribute
- Remove additional item attribute
- Search for additional item attribute
- Sort additional item attributes list

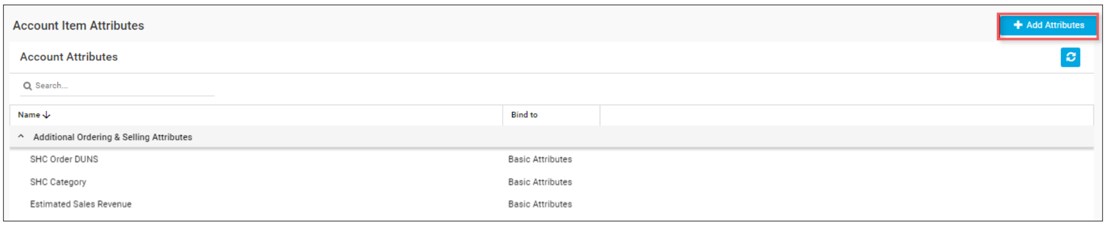
ADDING ADDITIONAL ITEM ATTRIBUTE

To add an additional item attribute from the global item attributes provided by 1WorldSyn, follow the steps:

1. Go to **Product Catalog** > **Item Attributes**.

   Result: The **Account Item Attributes** list opens.

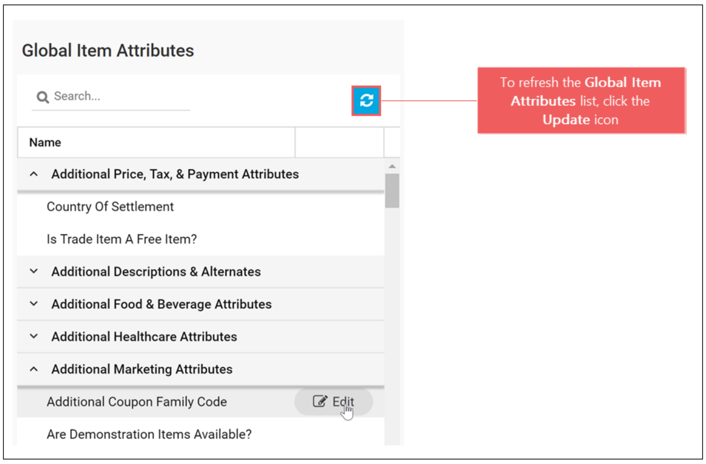
2. At the top right of the **Account Item Attributes** list, click the **Add Attributes** button.



Result: The **Global Item Attributes** list opens on the right of the **Account Item Attributes** form.

3. Find the global item attribute you want to add to your item. Use the **Search** field or expand the corresponding attributes group.

> To make sure the global item attributes list contains actual data, refresh it by clicking the update icon.



4. Double-click the found attribute.

   Result: The attribute is added to the **Account Item Attributes** list.

REMOVING ADDITIONAL ITEM ATTRIBUTE

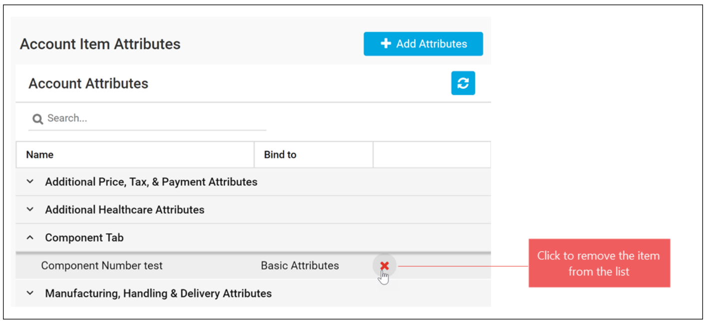
To remove an additional item attribute form the list, follow the steps:

1. Go to **Product Catalog** > **Item Attributes**.

   Result: The **Account Item Attributes** list opens.

2. Find the attribute you want to remove. Use the **Search** field, if needed.
3. Hover over the found attribute.

4. On the right of the attribute, click the cross sign.



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

   Result: The item attribute is removed from the **Account Item Attributes** list.

SEARCHING FOR ADDITIONAL ITEM ATTRIBUTE

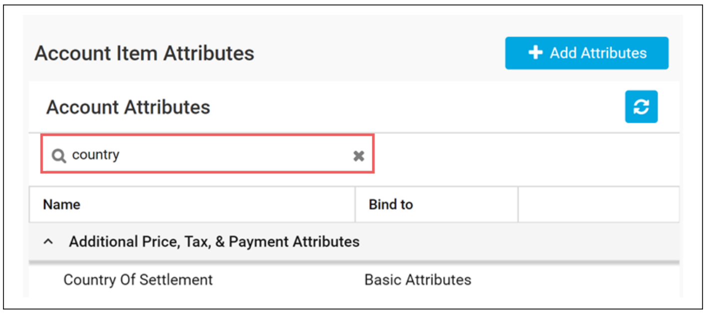
To search for an additional item attribute, follow the steps:

1. Go to **Product Catalog** > **Item Attributes**.

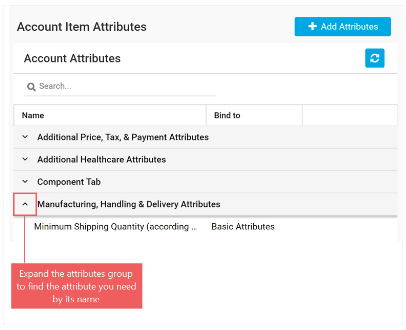
   Result: The **Account Item Attributes** list opens.

2. In the **Search** field, start typing the symbols from the attribute name.

   Result: The **Account Item Attributes** list contains the attributes with symbols from the **Search** field in the attribute name.



You can also expand the attributes groups, to find the required attribute by its name.



SORTING ADDITIONAL ITEM ATTRIBUTES LIST

You can sort the account item attributes list in ascending and descending order by any columns.

- To sort the **Account Item Attributes** list in ascending order by the certain column, click the name of this column.
- To sort the **Account Item Attributes** list in descending order by the certain column, click the name of this column twice.

Global Item Attributes

The Global Item Attributes menu is available for users with the Head Office role only. For more information on PIM roles, see PIM User Roles.

The Global Item Attributes form displays the list of available global item attributes provided by 1WorldSync.

You can add any attribute from the global item attributes list to your item. For more details, see Adding Additional Item Attribute.

You can perform the following actions with the global item attributes list:

- Edit global attributes names
- Refresh global item attributes list
- Search for global attribute
- Sort global item attributes list

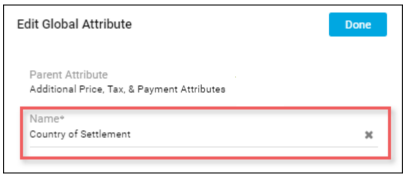
EDITING GLOBAL ATTRIBUTES NAMES

To edit a global attribute name in PIM, follow the steps:

1. Go to **Product Catalog** > **Global Items Attributes**.

   Result: The **Global Item Attributes** list opens.

2. Find the global attribute, which name you need to edit. Use search, if needed.
3. Hover the mouse over the found global attribute, and then on the right of the attribute, click **Edit**.
   Result: The **Edit Global Attribute** form opens.
4. In the **Edit Global Attribute** form > **Name** field, edit the attribute name.
5. After editing the attribute name, at the top right of the **Edit Global Attribute** form, click **Done**.

   Result: The global attribute name is updated in the **Global Item Attributes** list.

REFRESHING GLOBAL ITEM ATTRIBUTES LIST

To refresh the Global Item Attributes list, follow the steps:

1. Go to **Product Catalog** > **Global Item Attributes**.

   Result: The **Global Item Attributes** list opens.

2. At the top right of the **Global Item Attributes** list, click the update button.

SEARCHING FOR GLOBAL ATTRIBUTE

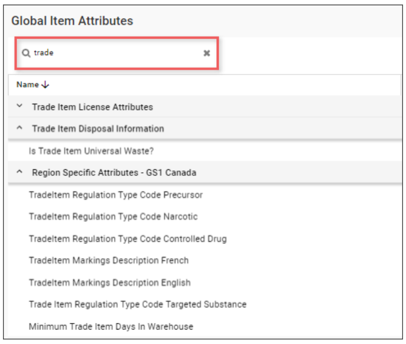
To search for a global attribute in PIM, follow the steps:

1. Go to **Product Catalog** > **Global Item Attributes**.

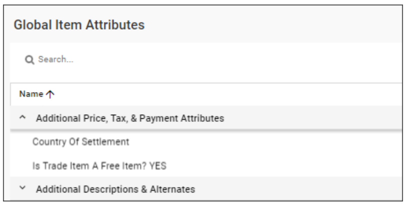
   Result: The **Global Item Attributes** list opens.

2. In the **Search** field, start typing the symbols from the global attribute name.

   Result: The **Global Item Attributes** list contains the global attributes with symbols from the **Search** field in the global attribute name.



You can also expand the global attributes groups, to find the required global attribute by its name.



SORTING GLOBAL ITEM ATTRIBUTES LIST

You can sort the global item attributes list in ascending and descending order by the Name column.

- To sort the **Global Item Attributes** list in ascending order by the **Name** column, click this column.
- To sort the **Global Item Attributes** list in descending order by the **Name** column, click the name of this column twice.

Setting Up Taxes and Product Codes for Items in Bulk

In PIM, you can set up product codes and taxes for items in bulk. This method can be helpful if you need to set up the same product code and taxes for items in a number of locations at once.

For setting up product codes and taxes in bulk, PIM leverages location tags. For example, you have several locations in the same province and need to set up the same tax settings for a specific item in these locations. In this case, you can create a province location tag and categorize your locations using this tag. In PIM, you will be able to select a group of these locations by the location tag and configure the same tax settings for this group simultaneously.

> To be able to set up the product codes and taxes for items in bulk, the user must have the CR Department Attribute Management permission.

To set up product codes and taxes for items in bulk, you need to perform the following activities:

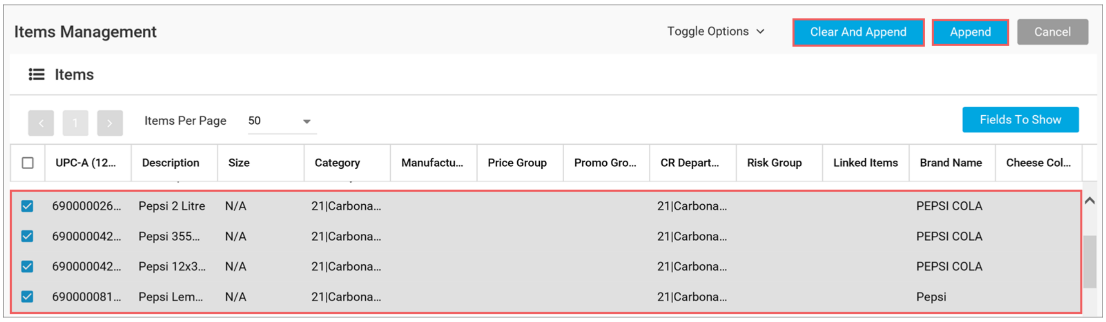
1. Select one or more items for which you need to set up the product code or taxes.
2. Select a location tag by which you want to set up the product code or taxes.
3. Set up the product code or taxes by the location tag.

Selecting Items

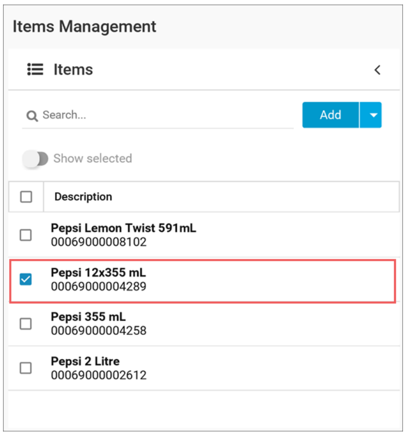
You need to select items for which you want to set up the product code or taxes. You can set up the product code and taxes for one item or a group of items at once.

To select one or more items for product code and taxes setup, follow the steps:

1. Go to **Product Catalog** > **Items Management**.
2. In the **Items** pane on the left, click the **Add** button.
3. In the displayed **Items** form, use the Find tool to find the necessary items.
4. In the displayed list of items, select the check boxes next to the items for which you want to set up the product code or taxes.
5. At the top right corner of the **Items** form, click the **Append** button.
   If you want to remove the previously added items from the list in the **Items** pane, click the **Clear and Append** button.



6. The selected items are added to the list in the **Items** pane. Select the check boxes next to the items for which you want to set up the product code or taxes.



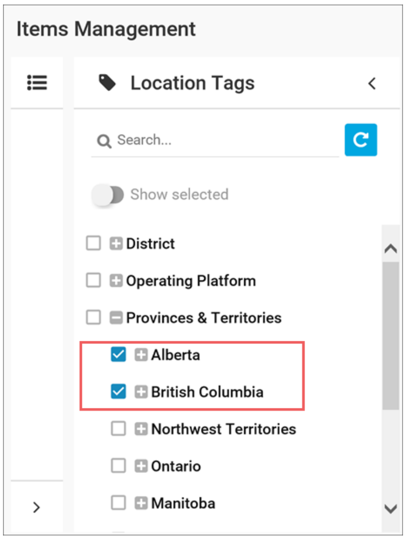
Selecting Locations by Location Tags

After you have added items to the items list, you need to select a location tag by which you want to set up the items product code or taxes.

To select a location tag, follow the steps:

1. In the **Items Management** form, in the **Location Tags** pane, expand the tags tree.
2. Select check boxes next one or more tags by which you want to set up the items product code or

taxes.

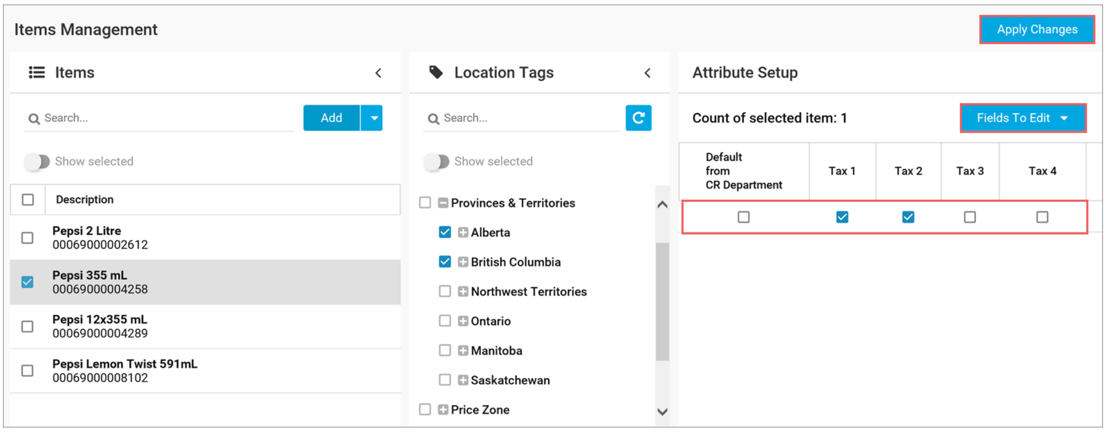


Setting Up Product Codes and Taxes

To set up the product code or taxes for item(s) by the selected location tag, follow the steps:

1. To the right of the **Attribute Setup** pane, click the **Fields to Edit** button and select the attribute for which you want to specify values: **Taxes** to **Product Code**.
2. In the displayed fields, set up the attribute values:
   - For product code: in the **Product Code** field, specify the necessary product code.
     If you want to use the product code specified at the CR department level, select the **Default from CR Department** check box on the left.
   - For taxes: in the taxes fields, select the check boxes for taxes that must be applied to the item (s).
     If you want to apply taxes specified at the CR department level, select the **Default from CR Department** check box on the left.
     For more details, see Setting Up Taxes and Product Codes for CR Departments.

3. At the top right corner of the **Items Management** form, click the **Apply Changes** button.



Result: The specified attribute values (product code or taxes) are updated for the selected item(s) in the locations having the selected location tag(s).

Taxonomy

In PIM, the items taxonomy is determined by the following elements:

- Categories
- Price Groups
- Promo Groups
- CR Departments
- Item Tags
- Vendors
- CR Department Attribute Management

Categories

All the items Price Book categories is the way of item classification used for the report creation.

Categories might seem similar to the departments, except for the departments are used for the cash register.

> ***Example***
> *Grocery taxable and Grocery non-taxable pertain to different CR departments, but fall into the same category - Groceries.*

There are two different methods of accounting used for the categories in the PIM:

- **Retail Method of Accounting.** This method calculates a store's total inventory value by taking the total retail value of the items that were originally in inventory, subtracting the total sales, then multiplying that dollar amount by the cost-to-retail ratio (the percentage by which goods are marked up from their wholesale purchase price to their retail sales price).
- **Cost Method of Accounting.** This method is used for the items containing of several ingredients which were bought separately, and are combined and sold all together. A cheeseburger, for example. Under this method merchandise additions are made at cost value and no retail value. They will not be extended to a retail value as are other store products. Retail value is added to the retail book inventory via a price change after the item is sold. The retail value will be determined by the related department sales found on the closing register tape.

> Only users with appropriate permissions can create, edit, and delete the categories.

HOW TO ACCESS THE CATEGORIES

On the main toolbar, click **Taxonomy** > **Category**.

HOW TO VIEW THE CATEGORY

Select the category you are interested in form the list, and then click the **View** button.

HOW TO VIEW THE ITEMS WITHIN THE CATEGORY

Select the category you are interested in form the list, and then click the **Items List** button.

For more information, see Items.

HOW TO ASSIGN ITEMS TO THE CATEGORY

1. Do one of the following:
   - If you want to reassign the items from the specific category, select the category, and then click **Items List**.
   - If you want to assign the item or the group of items from different categories, click **Item**,and find the item or items you are interested in using the find and replace tool. For more information on using the find and replace tool, see Find and Replace Tool.
2. Do one of the following:
   - To assign one item at a time, select the item **Edit** or **View** for the specific item, and then select the category you want from the corresponding list. Click **Save**.
   - To assign items to the category in bulk, select these items by clicking them, and then click **Add to Tag**. In the **Item Tags** list, select the category you need. To save the changes, click **Add to Tag** .

HOW TO FILTER CATEGORIES

You can filter the categories by the following options:

- Category number
- Category name
- Block promo acceptance
- Cash register product code
- Item quantity

To sort the categories in the ascending or descending order, click the corresponding arrow sign  for the category you want.

HOW TO SEARCH FOR THE CATEGORY

You can search for the category the following ways:

- **A-Z search option**. Select the first letter of the category.
- **1-9 search option.** Select the digit containing in the category name.
- **Custom search**. Click the corresponding icon and enter the letters or numbers the category attribute contains.

HOW TO DELETE A CATEGORY

1. Select the category you are interested in form the list, and then click the **Delete** button.
2. Confirm the deletion.

> Once deleted, the category can be restored only by the technical support.

HOW TO PRINT THE CATEGORIES LIST

To view the list of categories in the printer friendly view, click the **Print** button.

CStoreOffice® loads the list of categories created in CStoreOffice® to a file of the PDF format and saves this file to the default downloads folder on your computer. To open the file, locate the downloaded file on your computer and double-click it.

List of Categories
Greyhound

CSTOREOFFICE
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CATEGORY #	NAME	BLOCK PROMO ACCEPTANCE	CR PRODUCT CODE	ITEMS QTY
1	Cigarettes	1	410	839
2	Tobacco	0	410	943
3	Dairy	0	460	160
4	Ice Cream	0	0	167
5	Groceries	0	470	668
6	Juices	0	420	659
7	Motor Oil	0	101	47
8	Auto Supplies	0	101	141
9	Beer	0	0	69
10	Wine	0	0	65
12	Soft drinks	0	420	637
13	Health and Beauty Aids	0	0	405
14	General Merchandise	0	0	629
15	Bakery	0	0	367
16	Frozen Foods	0	0	148
17	Refrigirated items	0	0	137
18	Snacks	0	440	1622
19	Magazines Books	0	0	15
20	Newspapers	0	0	107
21	Prepared sandwiches	0	0	112
22	Fast food	0	0	114
23	Candy	0	0	1078
24	Hot Grill	0	0	159
25	Chiken	0	0	33
26	Fresh Bakery	0	0	9

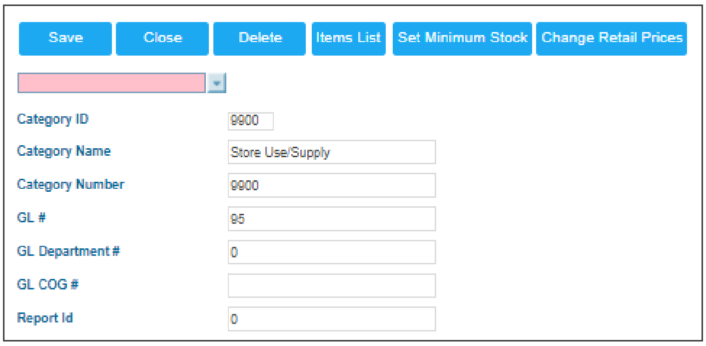
Page 1 of 4

Adding New Category

1. Click the **Add New** button.
   Result: The category adding form opens in a separate page.

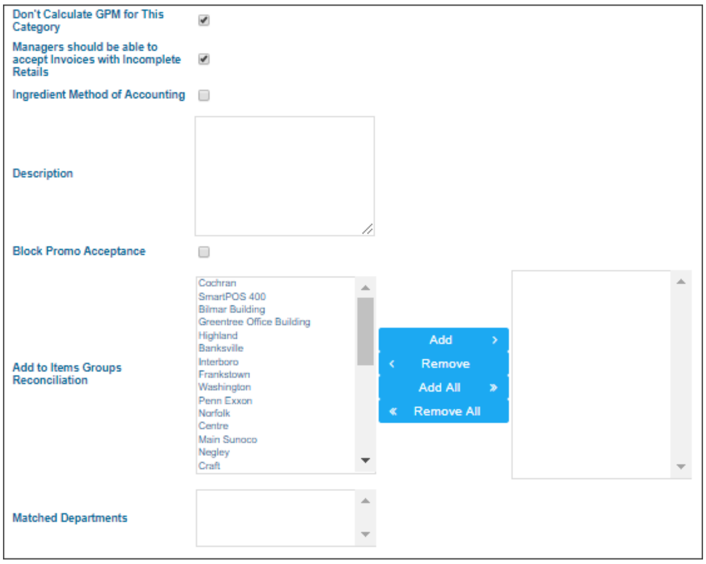
2. In the category adding form, do the following:
   a. Enter the following category basic information:

      - In the **Category ID** field, change the category identifier, if needed. The default value is the next available category identifier in the system.
      - In the **Category Name** field, enter the category name.
      - In the **Category Number** field, enter the category number, which usually equals to the category identifier.
      - In the **GL #** field, enter the general ledger number.
      - In the **GL Department #** field, enter the general ledger department number, if any.
      - In the **GL COG #** field, enter the general ledger cost of gods sold number, if any.
      - In the **Report ID** field, enter the corresponding report identifier, if any.



b. Specify the following category parameters, if needed:

Category Parameter	Description
Don't Calculate GPM for This Category check box	Select it, if you don't want the GPM (Gross Profit Margin) to be calculated for this category.
Managers should be able to accept Invoices with Incomplete Retails check box	Select it to allow managers to accept invoices with incomplete retails.
Ingredient Method of Accounting check box	Select it to mark your category as IMoA.
(For IMoA only) Exclude from "Full Inventory audits" check box	Select it to exclude the items from this category from the full audits list.
Description field	Enter the category description.
Block Promo Acceptance check box	Select it if this category participates in the promo action.
Add to Items Groups Reconciliation boxes	Use arrows to add stations you need to
Matched Departments box	This box displays the list of CR departments linked to this category. If you are just creating a new category, this box is empty. For more information on how to link a category with a CR department, see CR Departments > Matched Category option.



3. Click **Save**.

Editing Categories

To edit the category in PIM:

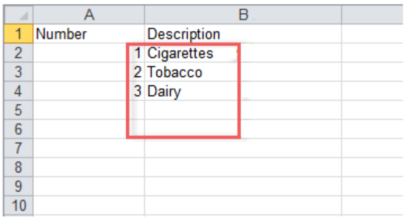
1. Select the category you want to edit.
2. Click the **Edit** button.
3. Enter or edit the following information:
   - Category ID
   - Category Name
   - Category Number
   - GL # (General Ledger number)
   - GL Department # (General Ledger department)
   - GL COG # (General Ledger Cost of Gods Sold number)
   - Report Id
4. If you don't want the GPM to be calculated for this category, select the corresponding option.
5. To allow the managers accept invoices with incomplete retails, select the corresponding option.
6. To mark the category as **Ingredient Method of accounting**, select the corresponding option.
7. (For IMoA only) Select if you want the items from the category to appear in the full audits list.
8. Enter the category description.
9. Select the **Block Promo Acceptance** option if the category participates in the promo action.
10. Add the category to **Items Groups Reconciliation**using the arrow buttons.
11. Enter the **Matched Departments** if they are present.
12. Click **Save**.

Importing Categories

Besides creating the categories for your Price Book manually, you can import them in bulk in the .xls (Excel) format.

1. On the main toolbar, click **Product Catalog** > **Import Items**.
2. Click **Categories**.
3. You have the following options:
   - **Use the template**. Download the template, edit it adding the categories of your own and upload it back.
   - **Use your own document**. Make sure your document meets the requirements, and then upload

it.



The first line contains the column headers (Name and Description). Start entering your categories starting from the second line.

Changing Retail Prices

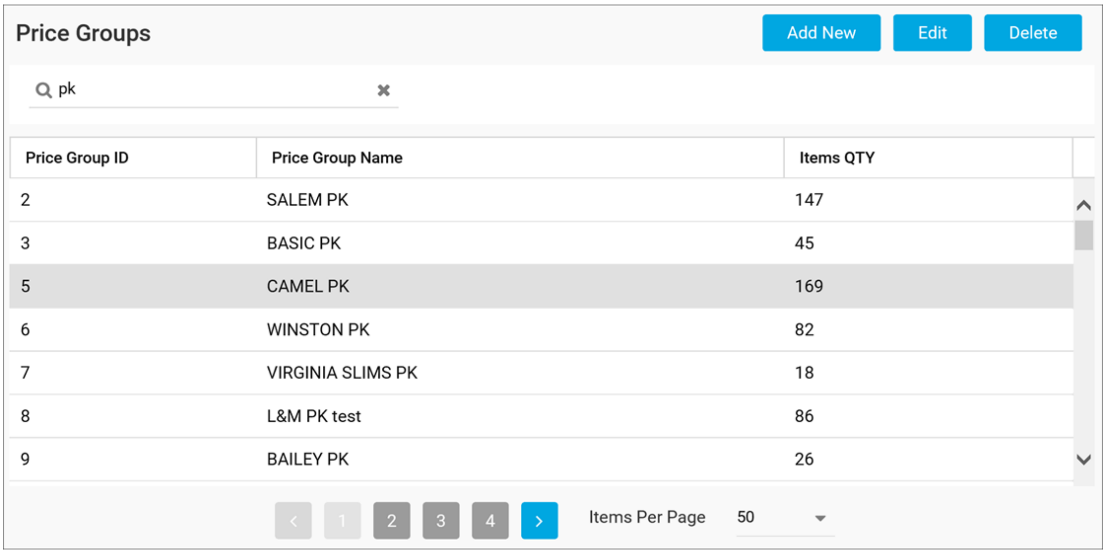
Besides changing the price for the specific item, you can change it for the whole item category as well. For more information, see Working with Retail Setup.

Price Groups

About Price Groups

A price group is a collection of items that have the same retail price. Price groups allow the user to quickly change prices of a large group of items in one place at the same time. This is a more efficient method of managing prices than trying to re-price numerous items one at a time. It also allows the user to preserve the identity of the item. Even though it is placed in a price group, the item level information on each item sold is captured so that inventory can be tracked accurately.

To open the list of price groups in PIM, go to **Taxonomy** > **Price Groups**.



You can perform the following operations with price groups in PIM:

Managing Price Groups

You can perform the following actions with price groups in PIM:

- Create Price Group
- Edit Price Group
- Delete Price Group

CREATING PRICE GROUP

To create a price group in PIM, follow the steps:

1. Go to **Taxonomy** > **Price Groups**.

   Result: The **Price Groups** list opens.

2. At the top right of the **Price Groups** list, click the **Add New** button.

   Result: On the right of the page, the **Price Group** form opens.

3. In the **Price Group** form, specify the following data:
   - In the **Price Group ID** field, enter the price group identifier.
   - In the **Price Group Name** field, enter the price group name.
4. At the top right of the **Price Group** form, click the **Save** button.

   Result: A new Price Group is added to the **Price Group** list.

EDITING PRICE GROUP

To edit existing price group in PIM, follow the steps:

1. Go to **Taxonomy** > **Price Groups**.

   Result: The **Price Groups** list opens.

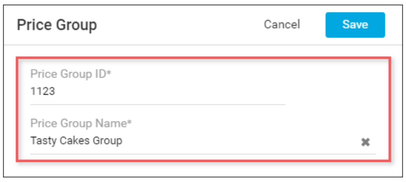
2. In the **Price Groups** list, do the following:
   a. Find the price group you want to edit. Use search, if needed.
   b. Select the price group you want to edit.

3. At the top right of the **Price Groups** list, click the **Edit** button.

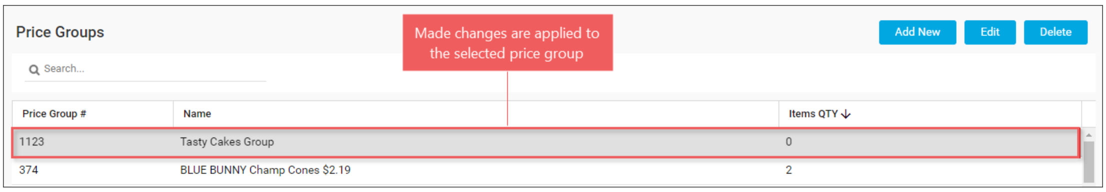
   Result: On the right of the page, the **Price Group** form opens.

4. In the **Price Group** form, edit the data in the following fields:
   - In the **Price Group ID** field, edit the price group identifier.
   - In the **Price Group Name** field, edit the price group name.

5. At the top right of the **Price Group** form, click the **Save** button.



Result: The changes made are applied to the selected price group.



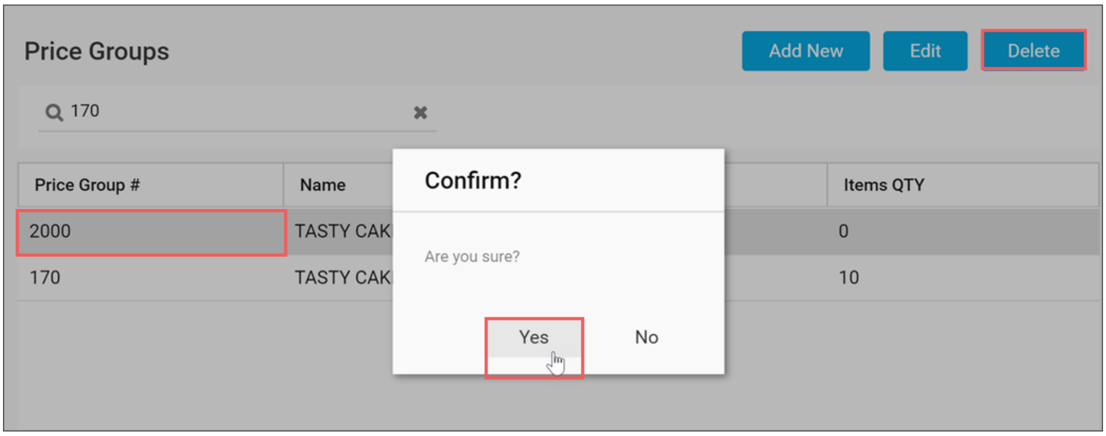
DELETING PRICE GROUP

To delete existing price group in PIM, follow the steps:

1. Go to **Taxonomy** > **Price Groups**.

   Result: The **Price Groups** list opens.

2. In the **Price Groups** list, do the following:
   a. Find the price group you want to delete. Use search, if needed.
   b. Select the price group you want to delete.
3. At the top right of the **Price Groups** list, click the **Delete** button.
4. In the confirmation window, click **Yes**.



Result: Selected price group is deleted from the **Price Groups** list.

Working with Price Groups List

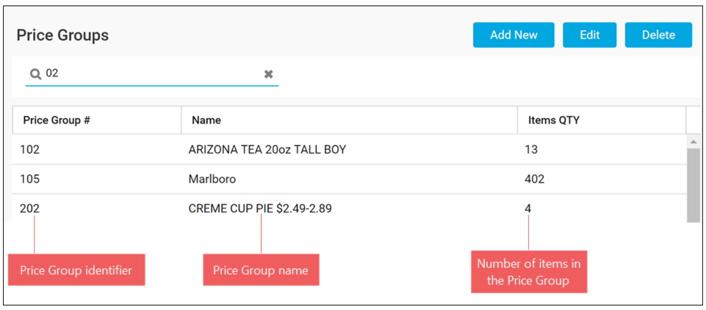
You can perform the following actions with the Price Groups list:

- View Price Groups Information
- Search for Price Group
- Sort Price Groups

VIEWING PRICE GROUPS INFORMATION

You can view the following information about each price group in the price groups list:

- **Price Group #**: The price group identifier
- **Name**: The price group name
- **Items QTY**: The number of items inside this price group



SEARCHING FOR PRICE GROUP

You can search for the price group you need in the price groups list by the value of any column: **Price**

Group #, **Name**, **Items QTY**.

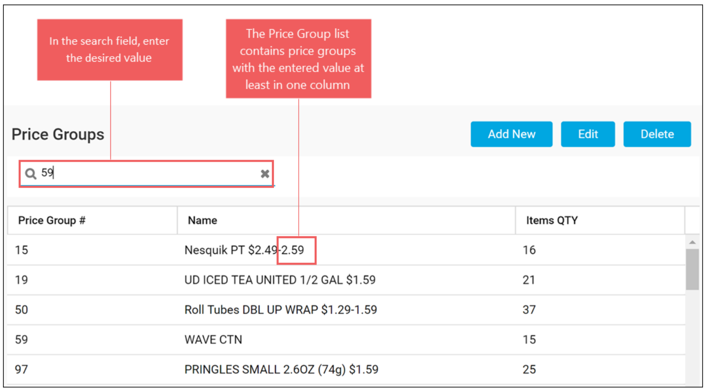
To search for the price group you need in PIM, follow the steps:

1. Go to **Taxonomy** > **Price Groups**.

   Result: The **Price Groups** list opens.

2. In the **Search** field, enter the desirable value.

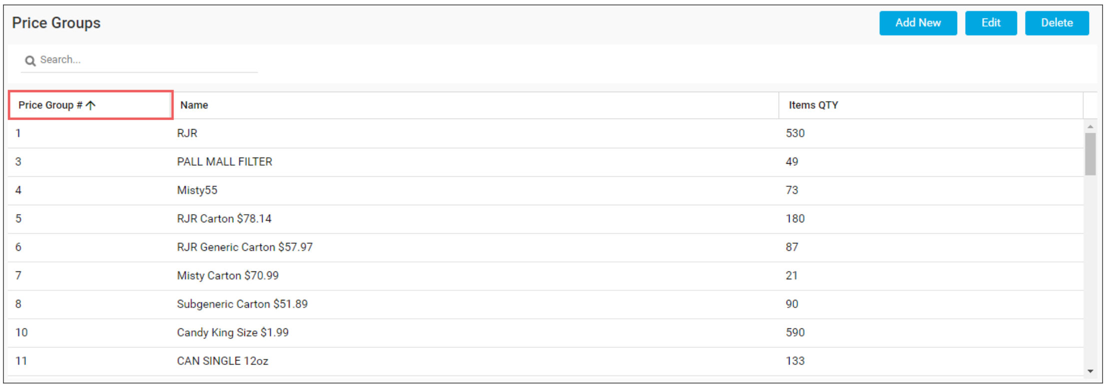
   Result: The **Price Groups** list contains price groups with the value entered in the **Search** field at least in one column.



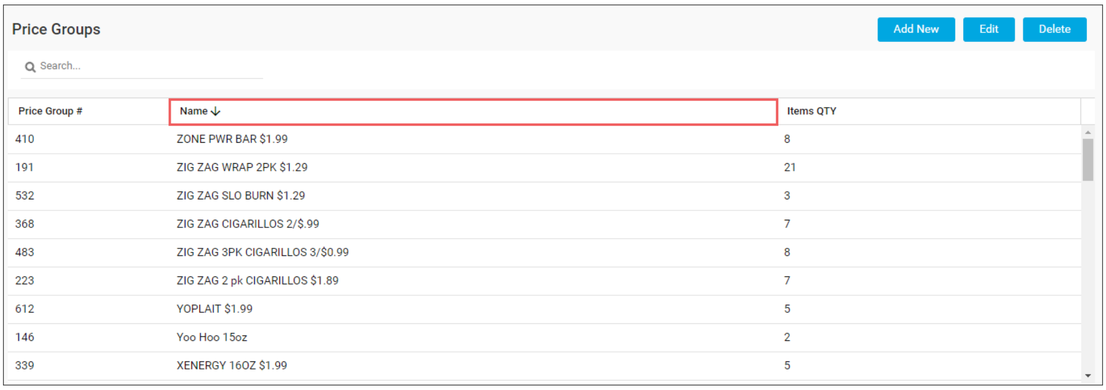
SORTING PRICE GROUPS

You can sort the price groups list in ascending and descending order by any columns.

To sort the **Price Groups** list in ascending order by the certain column, click the name of this column.



To sort the **Price Groups** list in descending order by the certain column, click the name of this column twice.



Price Groups

Add New | Edit | Delete

Search...

Price Group #	Name	Items QTY
410	ZONE PWR BAR $1.99	8
191	ZIG ZAG WRAP 2PK $1.29	21
532	ZIG ZAG SLO BURN $1.29	3
368	ZIG ZAG CIGARILLOS 2/$.99	7
483	ZIG ZAG 3PK CIGARILLOS 3/$0.99	8
223	ZIG ZAG 2 pk CIGARILLOS $1.89	7
612	YOPLAIT $1.99	5
146	Yoo Hoo 15oz	2
339	XENERGY 16OZ $1.99	5

Assigning Price Group to Item

To assign a price group to the item in PIM, follow the steps:

1. Go to **Product Catalog** > **Items**.

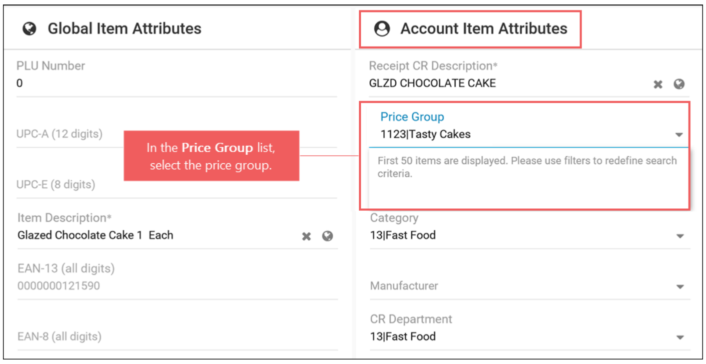
   Result: The **Items** list opens.

2. In the **Items** list, do the following:
   a. Search for the item you need to add to the price group. Use search, if needed.
   b. Select the item you need to add to the price group.

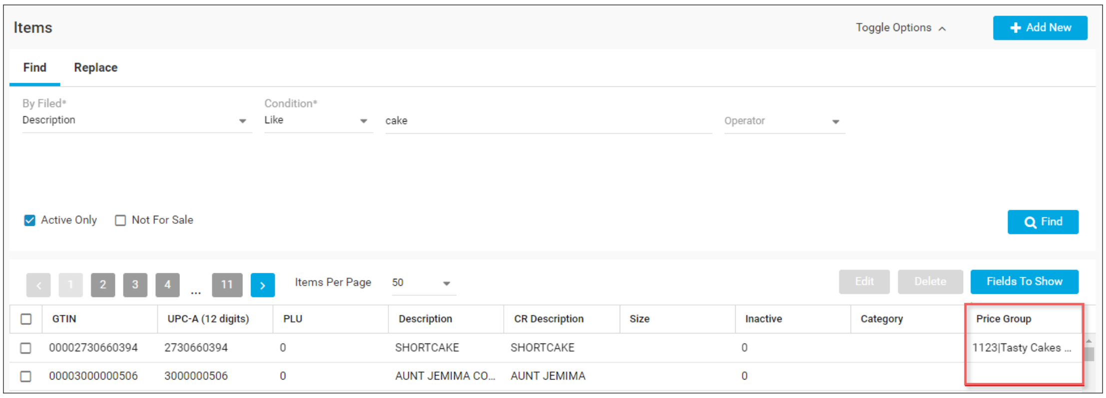
3. At the top right of the items list, click the **Edit** button.

   Result: The item editing form opens.

4. In the item editing form, go to **Item Attributes** > **Account Item Attributes**.
5. In the **Price Group** list, select the price group you want to assign to the item.
6. At the top right of the item editing form, click the **Save** button.



7. Make sure the price group is assigned to the item:
   a. Go to **Product Catalog** > **Items**, find the item and make sure that in the **Price Group** column, the assigned price group is displayed.



In case the **Price Group** column is not displayed in the **Items** list, click **Fields to Show**, in the **Item Attributes** list, select **Price Group** and then click **Save**.

b. Go to **Taxonomy** > **Price Groups**, find assigned price group and make sure that in the **Items QTY** column, the number of items is increased by 1.

Setting Up Retail Prices to Price Group

You can set up the price group retail price for one or several locations or any other locations tags.

You can also set up retail prices for several price groups at once.

To set up the price group retail price in PIM, follow the steps:

1. Go to **Price Management**.

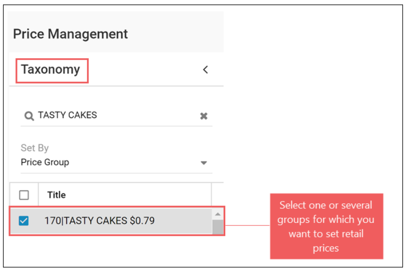
   Result: The **Price Management** form opens.

2. Go to the **Taxonomy** section and then do the following:

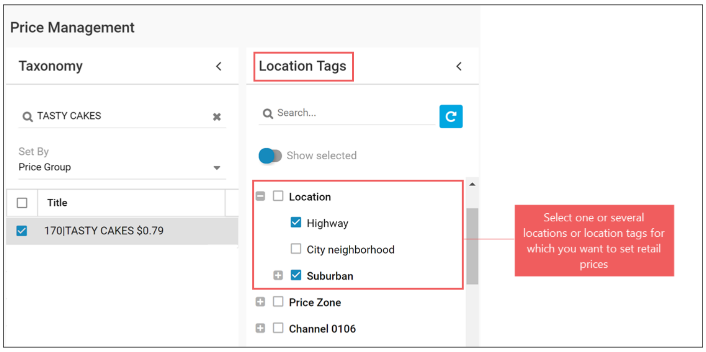
   a. In the **Set By** list, select **Price Group**.

      Result: The list of existing price groups opens.

   b. Select one or several price groups, for which you want to set up the retail price. Use the **Search** field, if needed.

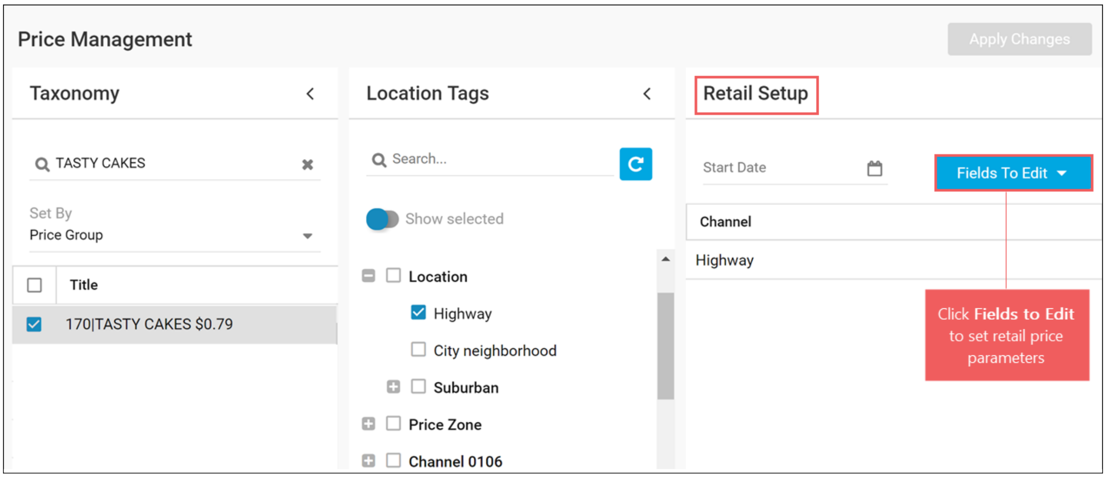


3. Go to the **Location Tags** section and then select one or several locations or other location tags, for which you want to set up the retail price for the selected price group.



4. Go to the **Retail Setup** section and then do the following:
   a. Go to the **Channel** column, and select a location, for which you want to set up prices.
   b. Click **Fields To Edit** and then select one or several of the following parameters:
      - **Recommended Retail**: The purchase price recommended by the account owner.
      - **Apply Recommended Retail**: Select this option if you want to forbid the recommended retail price change at the selected locations.
      - **Min Retail**: The least possible retail price value for the selected locations.
      - **Max Retail**: The greatest possible retail price value for the selected locations.
      - **Negotiated Cost**: The originally agreed price with the vendor.
   c. Set values for the parameters selected at the step 4.b. For details, see Working with Retail Setup.
5. In the **Start Date** calendar, select the date, from which specified retail prices will be applied.

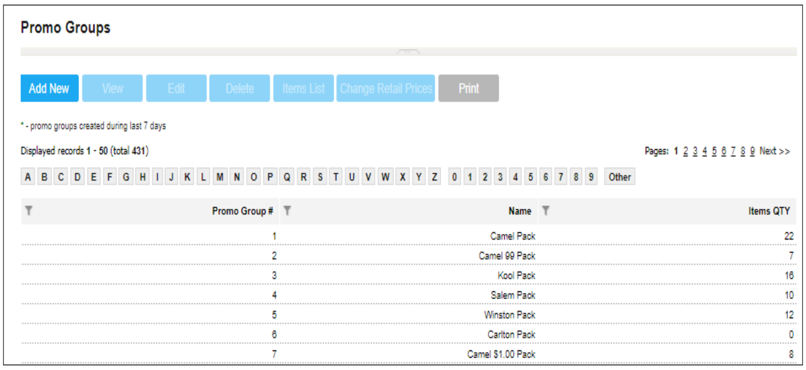
6. At the top right of the **Price Management** form, click the **Apply Changes** button.



After setting up retail prices for locations, you need to send these updates to the locations in the Updates Manager section.

Promo Groups

Promo Groups allow the user to include a number of items in a given marketing promotion.



Only users with appropriate permissions can create, edit, and delete the promo groups.

HOW TO ACCESS PROMO GROUPS LIST

To open the list of promo groups, go to **Taxonomy** > **Promo Groups**.

All new (created within the last seven days) promo groups are marked with the green asterisk.

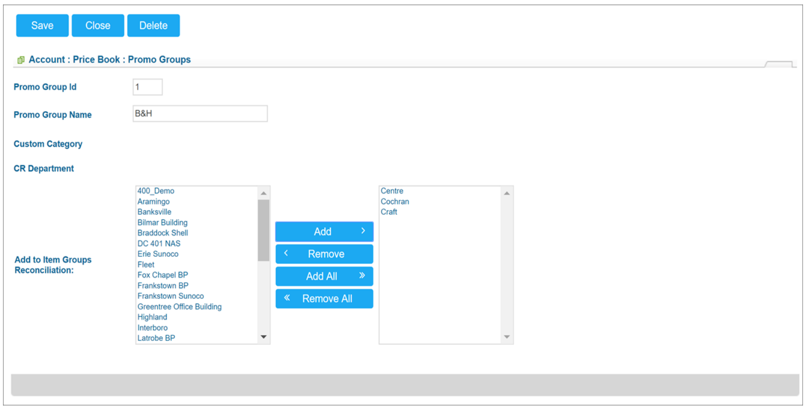
HOW TO ADD OR EDIT PROMO GROUPS

To open the form for editing a promo group, click **Add New** or select a group in the list and click **Edit**.

Items in the **Promo Groups** form include:

- **Promo Group ID**: The promo group number
- **Promo Group Name**: The name of the promo group
- **Custom Category**: The category to which the items of this group belong
- **CR Department**: The cash register department to which the items in this group belong

Promo Groups can be combined with the regular items to create the Price Each Mix promotions.



The Related Information section includes:

- **Promo Groups List**: Displays a report with a list of the groups
- **Promo Group Items**: Displays a list of the items included in the selected promo group

HOW TO PRINT PROMO GROUPS LIST

To view the list of promo groups in the printer friendly view, open the promo groups list and click the **Print** button at the top of the list.

PIM loads the list of promo groups to a file of the PDF format and saves this file to the default downloads folder on the computer. To open the file, locate the downloaded file on the computer and double-click it.

List of Promo Groups
Greyhound

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PROMO GROUP #	NAME	ITEMS QTY
1	B&H	1
2	BASIC	24
3	CAMEL 99	5
4	CAMEL CORE	6
5	CAPRI	90
6	CIMARRON	2
7	DORAL	3
8	L&M	10
9	GPC	14
10	Pall Mall .50c off	9
11	KENT	1
12	KOOL	11
14	Marlboro Mainline	21
15	MAVERICK	13
16	MERIT	4
17	MISTY	6
18	Camel Turkish Blnd	6
19	NEWPORT	15
20	PALL MALL	14
21	PARLAMENT	9
22	SALEM	16
23	USA	14
24	MARL .50 OFF PK	0
26	VIRG	16
27	WINSTON	18
28	B&H-CART	1

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CR Departments

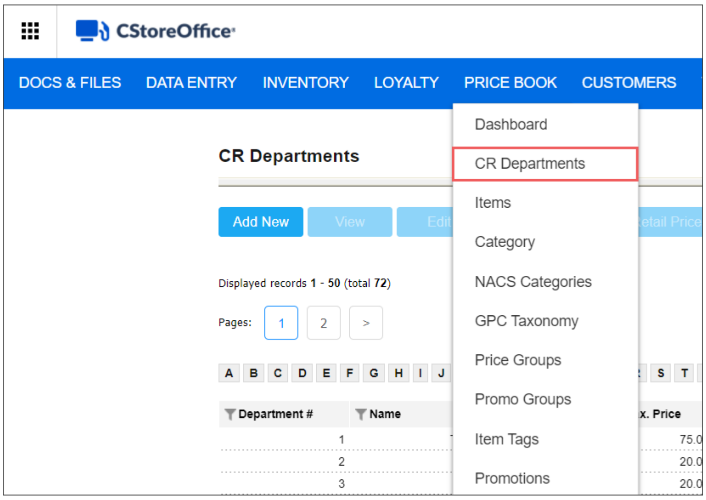
CR departments are used to combine sales data in the register into logical groups to make tracking and reporting sales data easier. Every cash register must have at least one department in order to function properly. CR departments are used to determine if tax should be charged when the item is sold.
CR departments are matched to categories.

Use the CR departments tool to create, edit, or delete your own CR departments. Specific items can then be assigned to CR departments using the Items tool.

> Each item in your Price Book must be assigned to a proper department so that it can be referenced to in reports. Items not assigned to a CR department are not transferred to your cash register.

CR departments are account-level objects: that is, settings of CR departments are applied to all locations of the account. If you need to configure custom department settings for a specific location, you can leverage the **Use station departments list** option. For details, see Advanced Settings.

To access the CR Departments list, go to **Taxonomy** > **CR Departments**.



You can perform the following actions with the CR departments in CStoreOffice®:

- Add or edit a CR Department.
- Change CR department settings.
- Define the CR department's type by its income type.
- Print the CR departments list.
- Create, edit, or delete department product codes.

To get more information about the CR departments, watch the following videos:

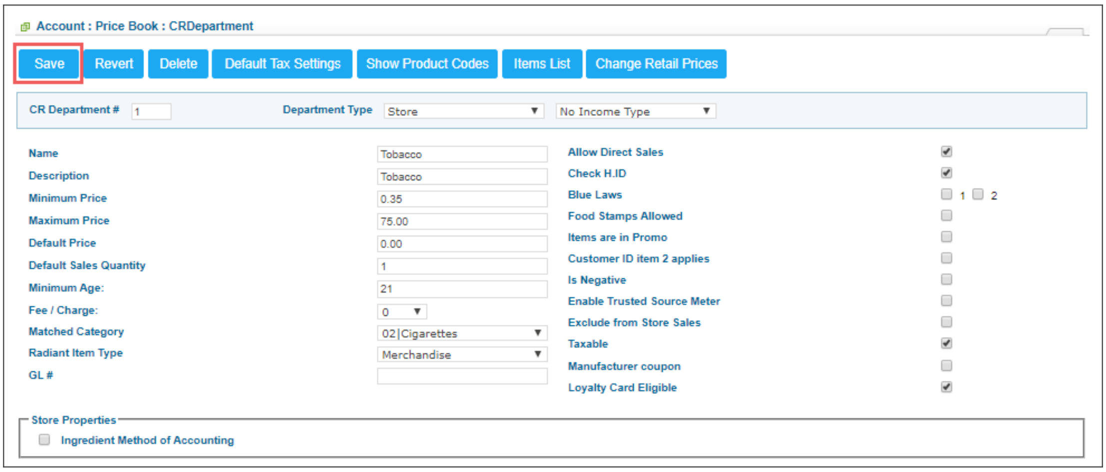
Changing CR Departments Settings

To change the CR department's settings and send updated data to POS:

1. From the PIM main page, go to **Taxonomy** > **CR Departments**.
2. In the **CR Departments** list, select the department you need to update and click the **Edit** button.

   Result: The CR Department form opens.
3. In the **CR Department** form:
   a. Change the attribute you need.

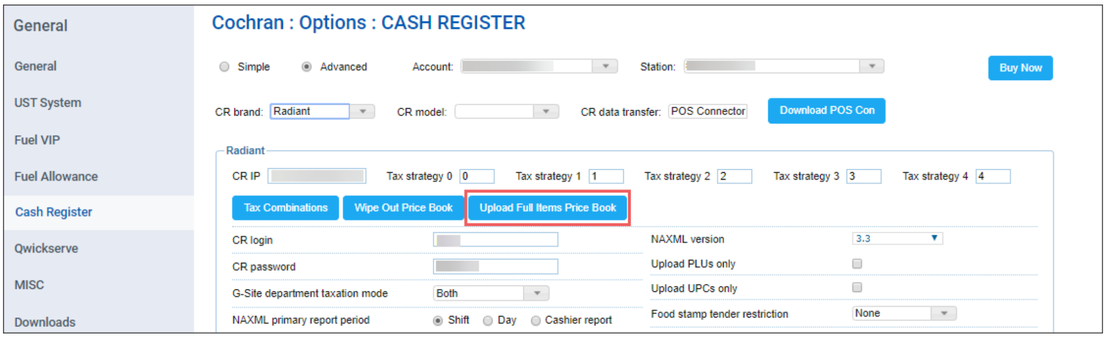
b. At the top left of the form, click **Save**.



4. To trigger the updates sending process, go to the **Cash Register** form.

> For more information on how to open the Cash Register form, see Setting Up Locations and Station Options: Cash Register.

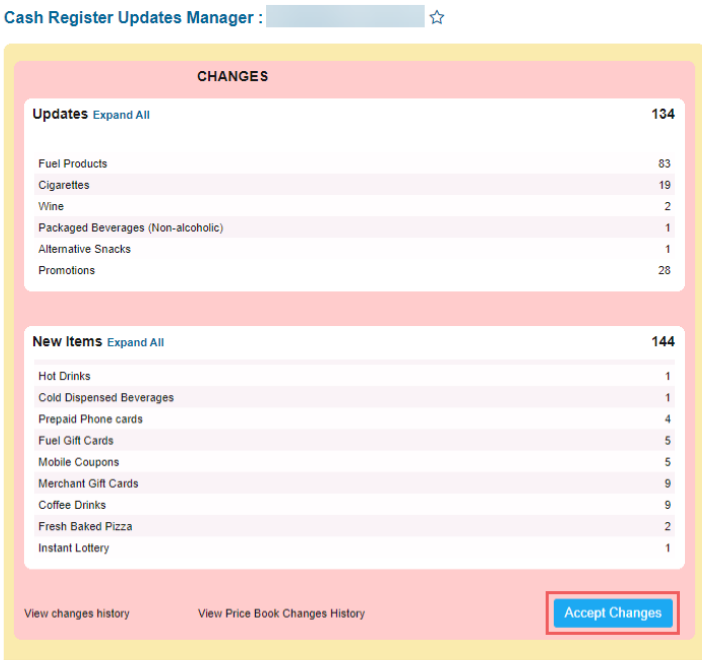
5. In the **Cash Register** form:
   a. Click **Advanced**.
   b. Click the **Upload Full Items Price Book** button.



> For details, see Cash Register Settings.

3. To accept changes sent to POS, go to the **Cash Register Updates Manager** form.

4. In the **Cash Register Updates Manager** form, click the **Accept Changes** button.

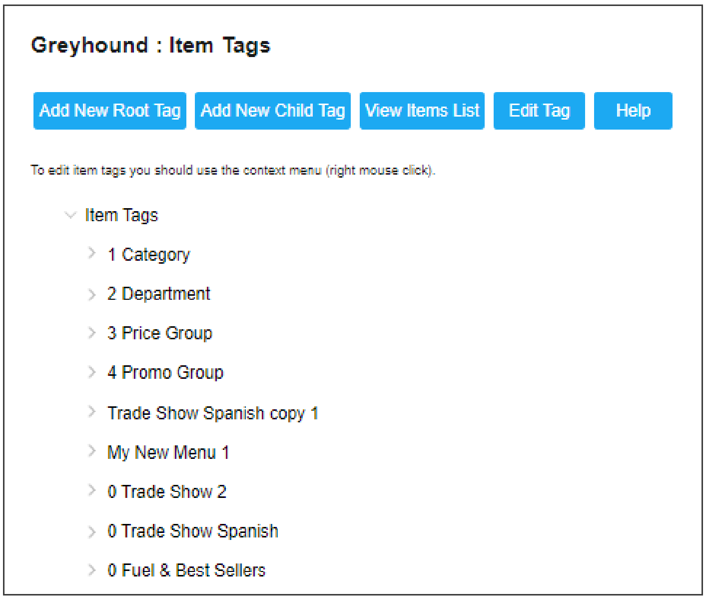


For more information on how to review and accept changes in the **Cash Register Updates Manager** form, see Reviewing and Accepting Changes.

Item Tags

PIM allows users to categorize items in inventory by cash register department and categories. The PIM Price Book allows users to easily create price groups and promotional groups to make pricing and promotions administration fast and efficient.

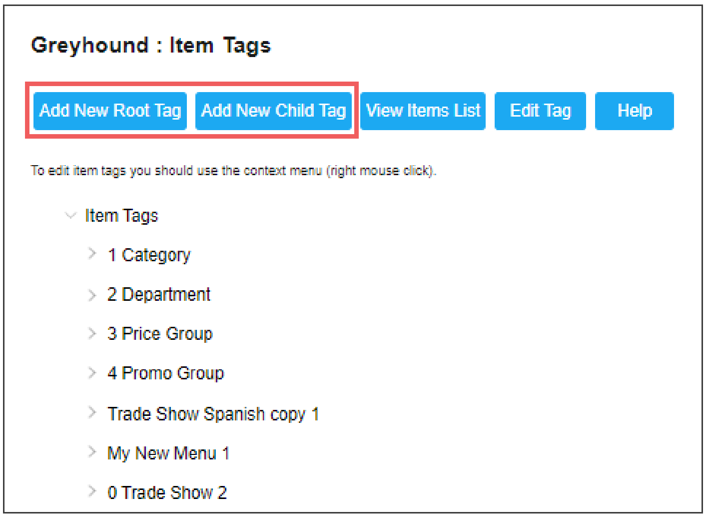
But the PIM price book also provides a unique and powerful tool to administer inventory—item tags. PIM item tags allow the user to create unlimited number of their own custom tags to group items by whatever attributes they might wish to create. Items can be assigned risk levels, size or location using items tags. Items can also be tagged by store, pricing zone, division or other business classification specific to your company.



Creating Item tags

To create **Item Tags**, follow the steps:

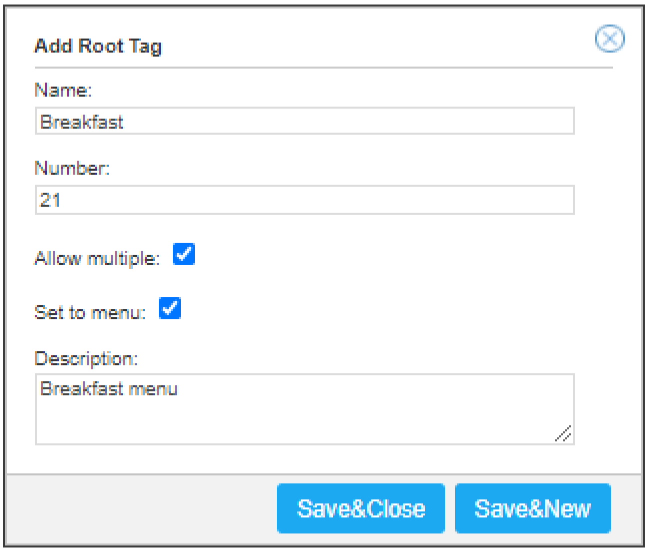
1. Go to **Taxonomy** > **Item Tags**.
2. Add a new **Item Tag**:
   - If you want to create a new root tag, click **Add New Root Tag**.
   - If you want to create a new child tag, click **Add New Child Tag**.



3. In the open **Dialog Window**, set the parameters for the **Item Tag**:
   - **Dialog Window**: Enter the desired name for the **Item Tag**.
   - **Number**: Enter the number to be assigned to the new **Item Tag**.
   - **External Number**: Enter the item's material code.

The **External Number** field is displayed on the item tag form only if the **Show External Number in Item Tag** option is selected in the account settings. For more information on how to use the External Number field, see GSAP Reports.

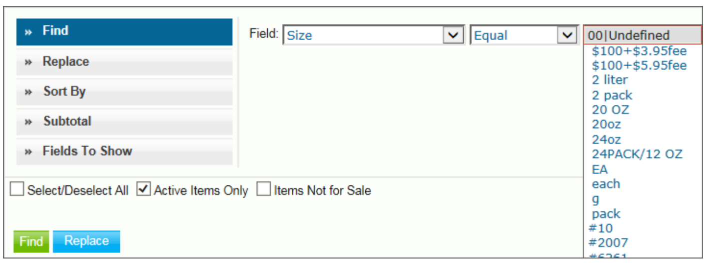
- **Allow multiple**: Select this check box, if you need to apply multiple tags from one parent.
- **Set to menu**: This check box is applicable only to the tags that are created automatically together with the [[[Undefined variable MyVariables.Qwickserve]]] menus. Select this check box for the tag, if you need to create the [[[Undefined variable MyVariables.Qwickserve]]] menus based on the tag and its child tags, if any. For details, see Copying [[[Undefined variable MyVariables.Qwickserve]]] Menus between Accounts and Locations.



4. Save the new **Item Tag**:
   - To save the new **Item Tag** and to close the form, click **Save&Close**.
   - To save the new **Item Tag** and to add a new **Item Tag**, click **Save&New**.

IS THERE A WAY TO REMOVE AN ITEM TAG FROM AN ITEM ONCE IT HAS BEEN TAGGED?

Yes. Go to **Taxonomy** > **Items** > **Find&Replace Tool** > set the item tags you want to remove to **00|Undefined**.



You cannot set the Department or Category to undefined.

Vendors List

The **Vendors** section allows you to set up and maintain the list of vendors in PIM.

In the **Vendors** list, you can view the following information about vendors:

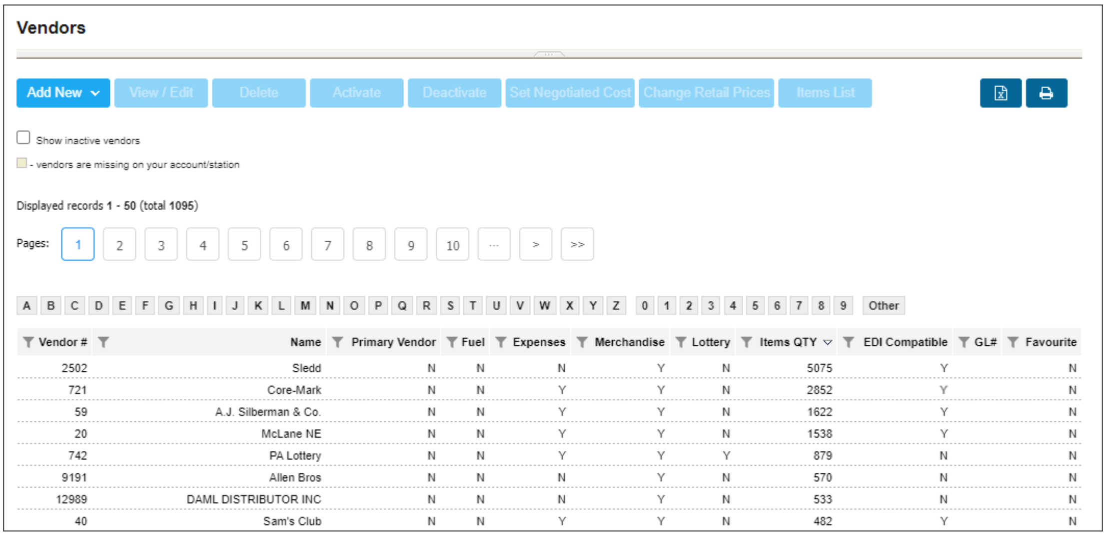
- **Vendor #**: The vendor's identifier.
- **Name**: Displays the vendor name.
- **Primary Vendor**: In this column, you can check if this vendor is primary or not.
- **Fuel**: In this column, you can check all fuel vendors. If **Y** is displayed, the vendor's type is **Fuel**.
- **Expenses**: In this column, you can check all expenses vendors. If **Y** is displayed, the vendor's type is **Expenses**.
- **Merchandise**: In this column, you can check all merchandise vendors. If **Y** is displayed, the vendor's type is **Merchandise**.
- **Lottery**: In this column, you can check all lottery vendors. If **Y** is displayed, the vendor's type is **Lottery**.
- **Items QTY**: The number of vendor items.
- **EDI Compatible**: In this column, you can view whether the vendor is configured at the account level to work through EDI with or without Fintech method of payment. The following statuses can be displayed:

Status	Is configured as EDI?	Is Fintech supported?
Y	Y	N
N	N	N
Y/F	Y	Y
N/F	N	Y

To turn on the Fintech method of payment for the vendor, select the **Use Fintech** option in the vendor setup form. For more information, see Configuring EDI Vendor Settings.

- **GL#**
- **Favorite**

You can display or hide any of the fields listed above by clicking **Fields to Show** and selecting or deselecting the corresponding field. For more information about all possible operations you can perform with the Vendors list, see Operational Panel (Find and Replace Tool).



You can perform the following actions with vendors:

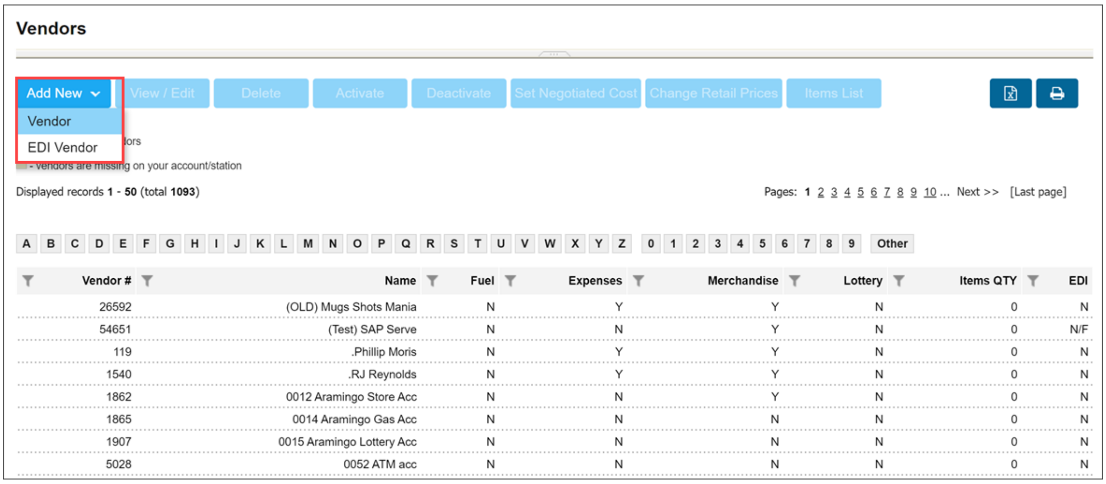
- Set up a merchandise vendor
- Set up an EDI vendor
- Configure vendor ordering settings for a location
- Configure vendor export settings for receiving merchandise orders
- Activate or deactivate a vendor

Setting Up Merchandise Vendors

You can set up merchandise vendors in PIM. Vendors are necessary to properly account for the delivery and payment of merchandise being received at the location.

To set up merchandise vendors:

1. Go to **Taxonomy** > **Vendors** > **Vendors List**.
2. At the top of the vendors list, click **Add New** > **Vendor**.



3. In the **General Info** section, configure general settings for the vendor:
   - **Name**: Enter the vendor name. Once you start entering the vendor name, similar names of existing vendors are displayed.
   - **Tax ID**: Specify the vendor's tax identification number. The tax ID is the unique identifier provided by the tax office to the tax payer.
   - **Active**: Newly created vendor is activated by default. To deactivate a vendor, set the toggle to the **Off** position.
   - **Abbreviation**: This field can be populated only by the users with the system role. If you need to set up the abbreviation assigned to the vendor, please contact the Petrosoft Support team.
   - **Country, State, City, Address, Zip, Phone, Fax, Email**: Specify data for the office location of the vendor.

     To specify the address information, from the **Country** list, select the necessary country and in the **Address** field, start typing the vendor address. PIM will display variants that match the entered address or a part of it, and automatically populate the address fields below depending on the selected variant.
   - **Contact person**: Specify a person who serves as your contact at the vendor office. This is usually your sales representative. If you need to add several contact persons, separate them by a comma as shown below.

   - **Vendor types**: Vendors can supply fuel, store items or services to you. Specify the vendor type to facilitate accurate vendor lists in the **Data Entry** and **Price Book** forms of the site. Vendors can be labeled by any of the following types:
     - **Merchandise**: Vendors of this type appear in all lists and forms related to the store.
     - **Fuel**: Vendors of this type appear in all lists and forms related to your petroleum products.
     - **Expenses**: Vendors of this type appear in all lists and forms related to expenses.
     - **Lottery**: Vendors of this type appear in all lists and forms related to your lottery games.

> Vendor type is also important for keeping accounting properly. For example, only vendors of the Expenses type can be selected for the transactions created for the expenses accounts.

   - **Account Number**: Enter the number of your account assigned by the vendor.
   - **GL Number**: Enter the global account number for this vendor. This field is optional. To make it mandatory, contact your system administrator.

- **Terms**: Select the payment terms.
- **Use Negotiated Cost in Invoices**: Select this check box to apply the negotiated cost to all items from this vendor by default in all manually created invoices.

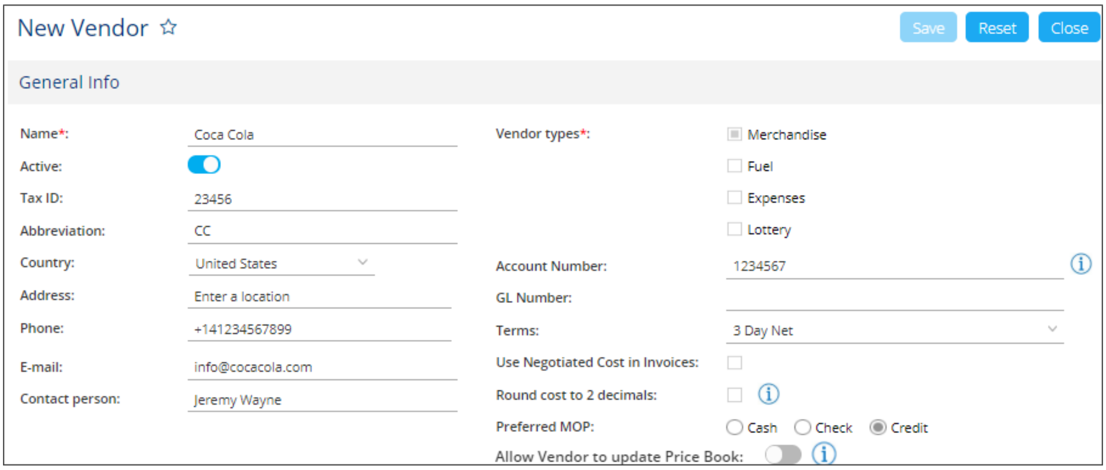
> For system operators, this option is not applicable as they must always enter cost manually from the printed invoice.

> To set the negotiated cost for the vendor, go to **Vendors List**, select the vendor and then click the **Set Negotiated Cost** button.

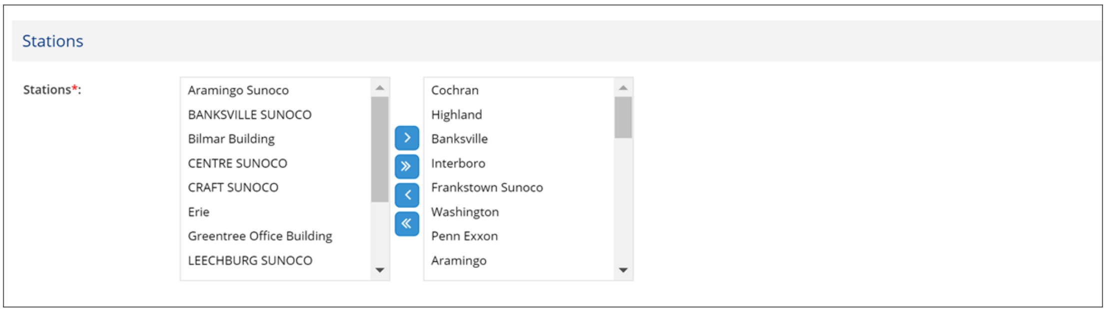
- **Round cost to two decimals**: Select this option, if you need to round costs in the invoices from this vendors up to two decimals.
- **Preferred MOP**: Select one of the following methods of payment used for this vendor:
  - **Cash**
  - **Check**
  - **Credit**
- **Cost Variance Range**: If the item's cost from the invoice differs from the item's vendor cost (negotiated cost) and you need to disregard this difference in further calculations, enter its value into this field. The cost exception is not created for the item, if the difference between the item's cost and negotiated cost values is not more than the Cost Variance Range value. A value with an accuracy of two decimal points can be entered. This field is not mandatory.

> For more information on how to analyze the cost exceptions data, see Cost Exceptions report.
> For more information on how to process different item costs in the invoice, see Defining the Item's Unit Cost in the Invoice.

- **Allow Vendor to Update Price Book**: Select this option, if you need all items and VINs coming in electronic invoices from this vendor to be added to the price book automatically.



4. In the **Stations** section, set up a list of locations for which the vendor must be active.



5. To export merchandise orders for the vendors, if needed, in the **Export Settings** section, configure the vendor export settings.

   For more information, see Configuring Vendor Export Settings.

6. At the top of the form, click **Save**.

When you save the vendor settings, you can additionally edit the following settings:

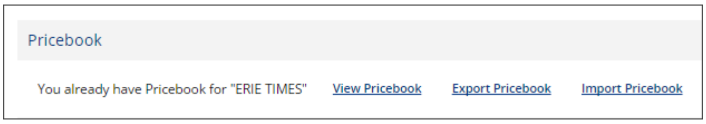
- Vendor Price Book settings
- Vendor manufacturers settings

Editing Vendor Price Book Settings

To configure, edit, or view the vendor's Price Book, click one of the following links:

- **Upload Pricebook**: This link is displayed for the vendor without Price Book items. To upload the pricebook, use the Import Tool.
- **View Pricebook**: This link is displayed in case the vendor has Price Book items.
- **Export Pricebook**: This link is displayed in case the vendor has Price Book items. Click the link, select the destination folder and then click **Save**. The Price Book is saved in the XLS file.

- **Import Pricebook**: Click the link to import the Price Book items for the vendor.

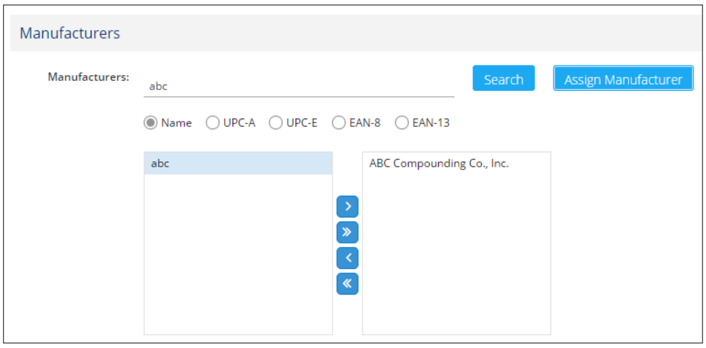


The links are displayed depending on the vendor's configuration stage.

Assigning Vendor Manufacturers

To assign a manufacturer to the vendor, follow the steps:

1. Search the manufacturer using one of the following search criteria:
   - Name
   - UPC-A
   - UPC-E
   - EAN-8
   - EAN-13
2. Select manufacturer and then add it to the **Selected** column.
3. Click **Assign Manufacturer**.



How to add a non EDI merchandise vendor

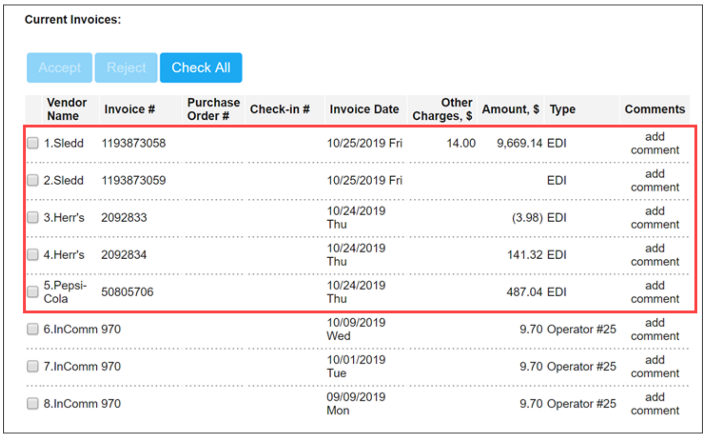
This video contains instructions on how to add a non EDI merchandise vendor in PIM.

Watch Video

Setting Up EDI Vendors

You can add EDI vendors from whom you are planning to receive merchandise and fuel in CStoreOffice®.

EDI stands for 'Electronic Data Interchange'. It is basically an alternate way for customers to receive their invoices. Instead of dealing with paper invoices, the EDI vendor can send digitally formatted invoices directly to CStoreOffice®. CStoreOffice® then automatically parses and processes the invoice data for the customer. The processed invoices appear in the **Pending Invoices** section in CStoreOffice®, and customers can work with them in a usual way.



Vendor Name	Invoice #	Purchase Order #	Check-in #	Invoice Date	Other Charges, $	Amount, $	Type	Comments
1.Sledd	1193873058			10/25/2019 Fri	14.00	9,669.14	EDI	add comment
2.Sledd	1193873059			10/25/2019 Fri			EDI	add comment
3.Herr's	2092833			10/24/2019 Thu		(3.98)	EDI	add comment
4.Herr's	2092834			10/24/2019 Thu		141.32	EDI	add comment
5.Pepsi-Cola	50805706			10/24/2019 Thu		487.04	EDI	add comment
6.InComm 970				10/09/2019 Wed		9.70	Operator #25	add comment
7.InComm 970				10/01/2019 Tue		9.70	Operator #25	add comment
8.InComm 970				09/09/2019 Mon		9.70	Operator #25	add comment

There is generally no human involvement in processing EDI invoices: if properly set up, the process is fully automated.

How to Set Up an EDI Vendor

The process of EDI vendors setup involves the following activities:

1. You must configure settings for an EDI vendor in CStoreOffice®. For details, see Configuring EDI Vendor Settings.
2. Once the EDI vendor is set up, you must send a request for EDI invoicing to the vendor. For details, see Sending a Request to the Vendor.
3. The vendor receives the request and configures all necessary settings for your account on the vendor side.
4. Once ready, the vendor starts sending invoices to the system. The Petrosoft Support Team verifies the first invoice to make sure the invoice data processing is set up properly. After that, you can proceed with handing invoices from the EDI vendor on your own.

> If a vendor is already set up and you want to request EDI invoicing from it, you can switch to the EDI vendor mode. For details, see Switching to the EDI Vendor Mode.

Configuring EDI Vendor Settings

To start receiving invoices from an EDI vendor, you need configure settings for this EDI vendor in PIM. Vendor settings must be configured at two levels:

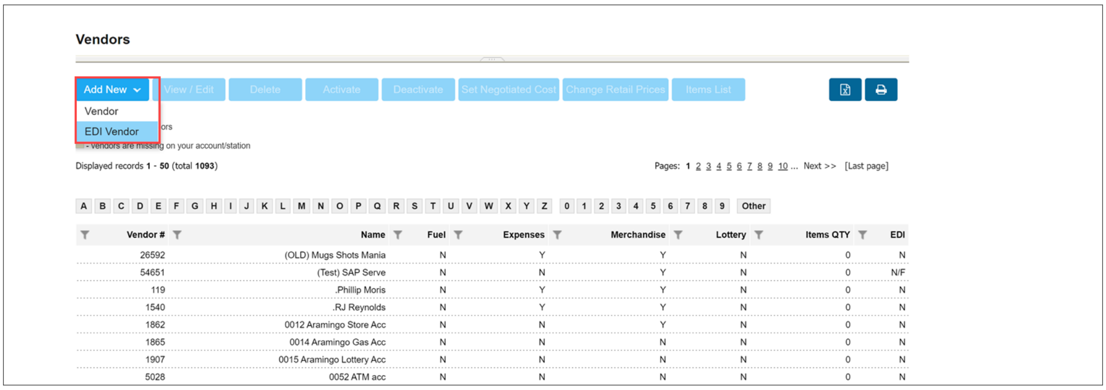
- Account level
- Location level

In this section, you can find the information about the settings which are required specifically for EDI vendors. For configuring common vendor settings, refer to the Setting Up Merchandise Vendors section.

Configuring EDI Vendor Settings at the Account Level

To configure EDI vendor settings at the account level:

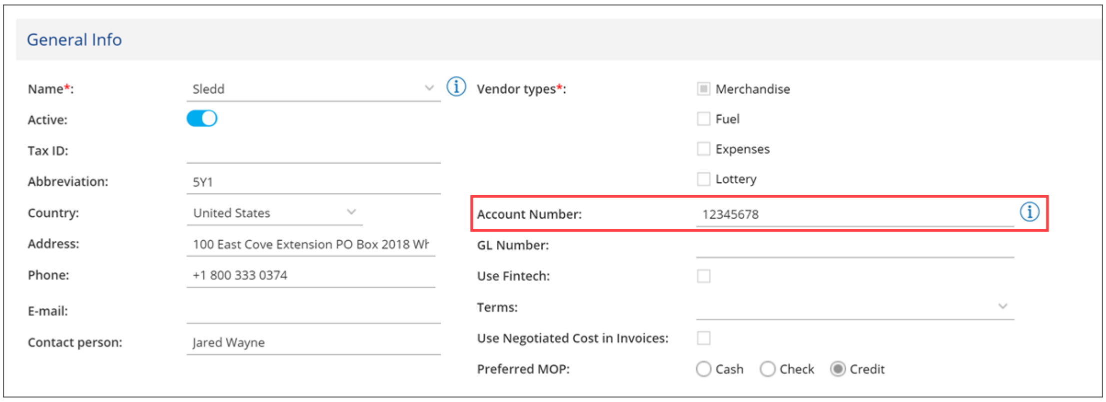
1. Go to **Taxonomy** > **Vendors** > **Vendors List**.
2. At the top of the vendors list, click **Add New** > **EDI Vendor**.



3. In the **Name** field, start typing the vendor name. If you are adding a standard vendor, PIM displays a list of suggestions. From the list, select the necessary vendor. Otherwise, enter the vendor name manually.

   If you select a standard vendor, PIM automatically populates the vendor details such as tax ID, address and vendor type in the **General Info** section. For a custom vendor, you need to specify the general information for the vendor manually.

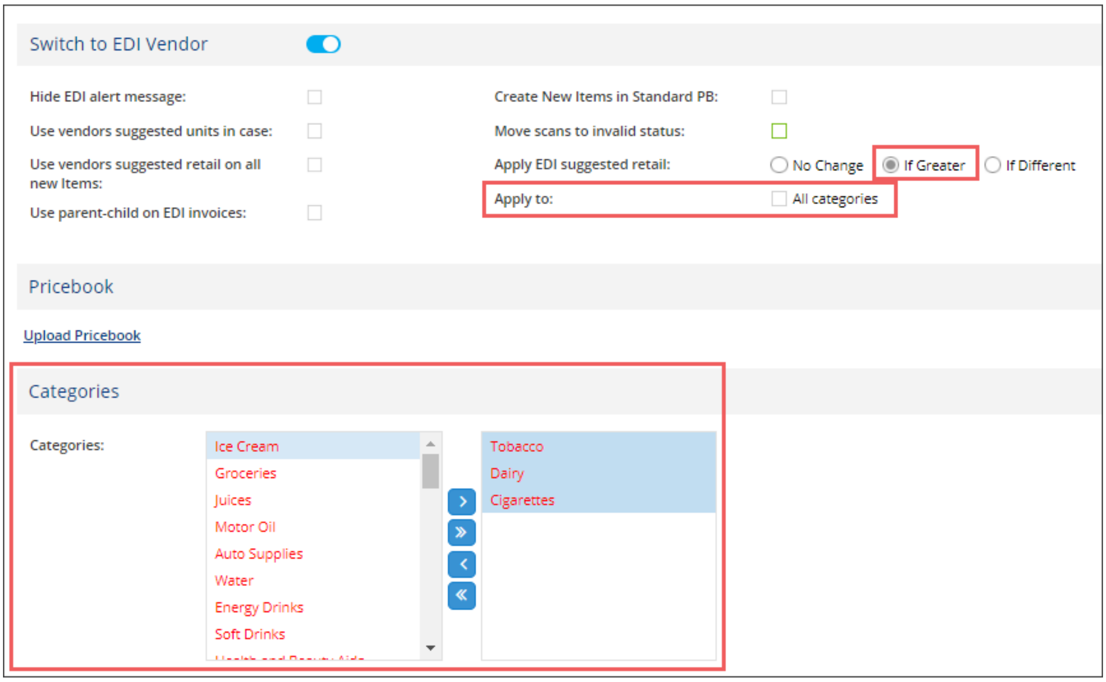
4. In the **Account Number** field, enter the account number assigned to you by the vendor.



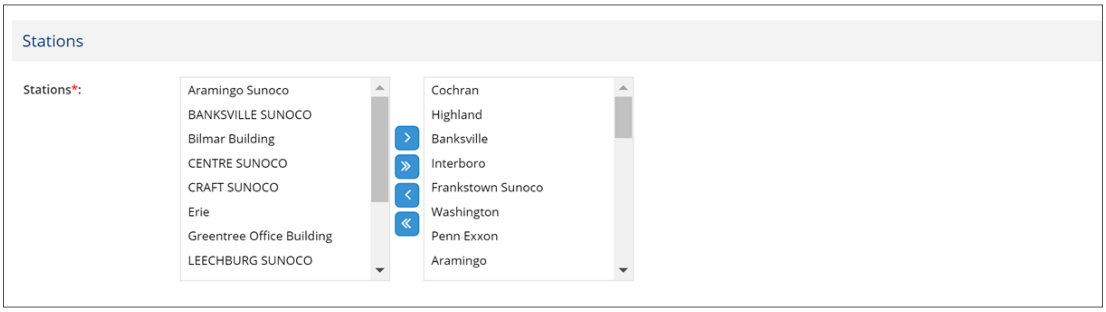
5. Select the **Use Fintech** option, if you need to apply the fintech method of payment to a vendor.

The fintech method of payment can be applied only to EDI vendor.

6. In the **Switch to EDI Vendor** section, configure the following settings:
   - **Hide EDI alert message**: Select this check box to hide alert messages when sending invoices via EDI during manual scanning of invoices for this vendor. The option is not enabled by default.
   - **Use vendor suggested units in case**: Select this check box to take the Unit in Case value from vendor invoices. Otherwise, the Unit In Case value is taken from the account's price book.
   - **Use vendor suggested retails on new items**: Select this check box to take the suggested retail prices for new Price Book items included in EDI invoices submitted by the vendor. If this option is not enabled, the retail prices for newly added items are taken from the Price Book in PIM.
   - **Use parent-child on EDI invoices**: Select this check box to take the suggested parent-child relations between the items included in EDI invoices submitted by the vendor.
   - **Create New Items in Standard PB**: Select this check box to create new items in the standard Price Book automatically during EDI invoice parsing.
   - **Move scans to invalid status**: Select this check box to mark scanned invoices as invalid if invoices are coming via EDI.
   - **Apply EDI suggested retail**: Select one of the following conditions to assign the suggested retail prices included in EDI invoices submitted by the vendor:
     - **No Change**: The retail price suggested by the vendor is not assigned to the item in the invoice. This option is enabled by default when the **Apply EDI suggested retail** option is enabled.
     - **If Greater**: The retail price suggested by the vendor is assigned to the item in the invoice in case the vendor retail price is greater than the item retail price.
     - **If Different**: The retail price suggested by the vendor is assigned to the item in the invoice in case the vendor retail price is greater or less than the item retail price.
   - **Apply to**: The **If Greater** and **If Different** options can be applied to item categories in one of the following ways:
     - **To all categories**: **Apply to** > select **All categories**.
     - **To some categories**: **Apply to** > clear **All categories**. In the **Categories** list, add the necessary categories to the list.



6. In the **Stations** section, set up a list of locations for which the vendor must be active.



7. At the top right of the form, click **Save**. You can now configure location-specific settings for the vendor.

Configuring EDI Vendor Settings at the Location Level

You need to configure vendor settings specific for every location.

To configure EDI vendor settings at the location level:

1. At the top of the vendor form, from the **Stations** list, select the location for which you want to configure vendor settings.
2. In the **Station Account Number** field, enter the account number assigned to this location by the vendor. You can find the account number in a vendor invoice.

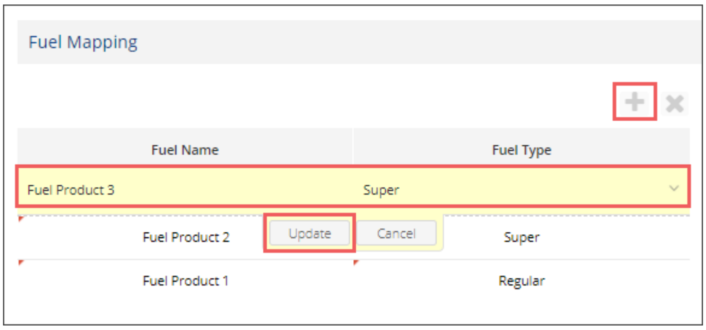
> If you need to add several station account numbers, they should be separated by semicolons. For example: "*982595;972173;894356*".

The value from the **Station Account Number** field is added then to the **Vendor Account** field in the email to vendor. For details, see Sending a Request to Vendor.

3. If you want to use the specified account number for orders, enable the **Use for orders** option and in the **Order Settings** section, specify the ordering settings. For details, see Configuring Vendor Ordering Settings.
4. Set up the fuel mapping, if needed:
    a. At the bottom of the page, go to the **Fuel Mapping** section.

    The **Fuel Mapping** section is displayed only for the EDI vendors with the fuel type configured at the station level. For more information, see Setting up the Fuel Products.

    b. For each fuel type, you need to map:
        a. Click the plus icon.
        b. Enter the fuel name.
        c. Select the fuel type.
        d. Click **Update**.

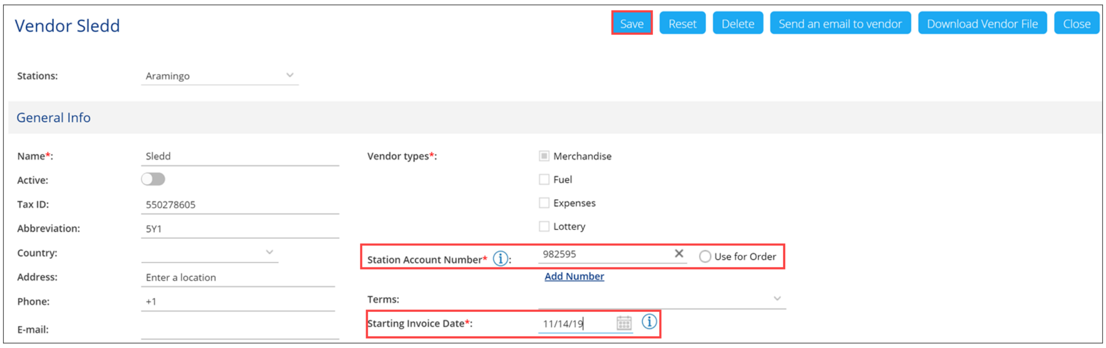


If the EDI invoice received by CStoreOffice® contains a new fuel product which is not mapped with any fuel type yet, you will need to map it manually in this section and then reprocess the invoice. For more information, see Fuel EDI invoice displayed in the parser cannot be found among fuel invoices.

5. To the right of the **Starting Invoice Date** field, click the calendar icon and select the date when the vendor must start sending invoices to PIM.

The vendor can send invoices from previous dates as well.

6. At the top right of the form, click **Save**.

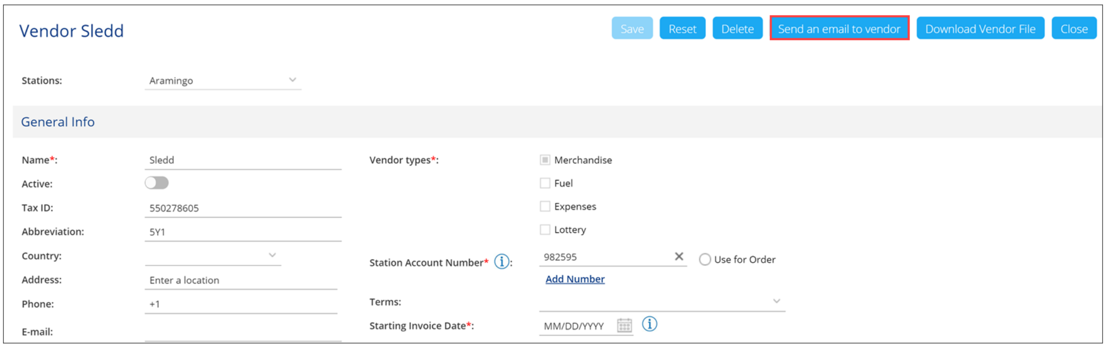


Sending a Request to the Vendor

After you configure EDI vendor settings in PIM, you need to notify the vendor that you want to request EDI invoicing for your locations. To do this, you can send an email directly from PIM. The copy of the email is sent to the Petrosoft Support Team so that the team can trace the progress and help with any issues if any.

To send a request to an EDI vendor:

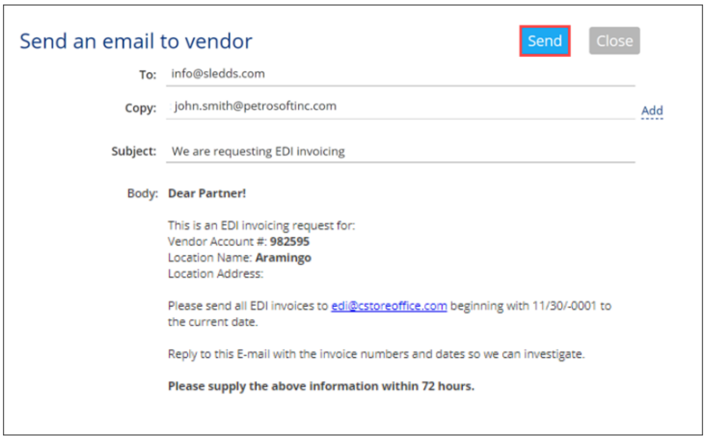
1. In the vendor form, switch to the location level. To do this, at the top of the form, from the **Stations** list, select the location for which you want to request EDI invoicing.
2. At the top right of the form, click **Send an email to vendor**.



Result: CStoreOffice® form an email and display it for you to review.

3. If you want to get a copy of the email to your email address, to the right of the **Copy** field, click **Add** and specify the email address to which the email must be additionally sent.

4. At the top right of the email, click **Send**.



The **Vendor Account** field value in the email to vendor is taken from the **Station Account Number** field.

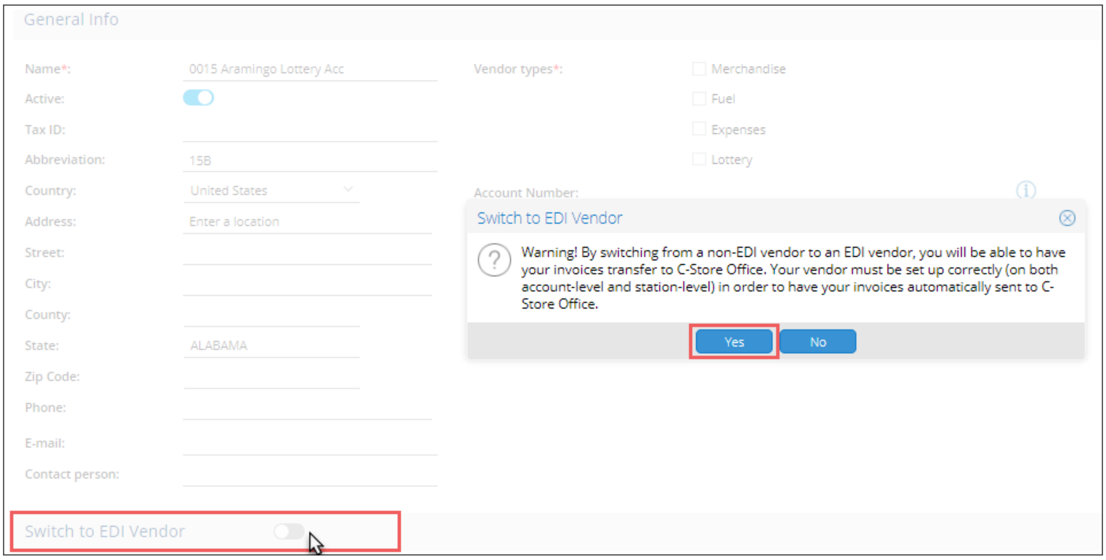
Switching to the EDI Vendor Mode

If you have a vendor set up in PIM and want to start receiving digitally formatted invoices from this vendor, you can enable the EDI mode for this vendor. Note that the vendor itself must provide EDI invoicing services and be in the list of EDI vendors approved by Petrosoft.

To switch to the EDI mode:

1. Go to **Taxonomy** > **Vendors** > **Vendors List**.
2. In the vendors list, select the vendor you want to convert and at the top of the list, click **View/Edit**.
3. In the vendor form, set the **Switch to EDI** Vendor toggle to the **On** position

4. In the **Switch to EDI Vendor** warning message, click **Yes**.



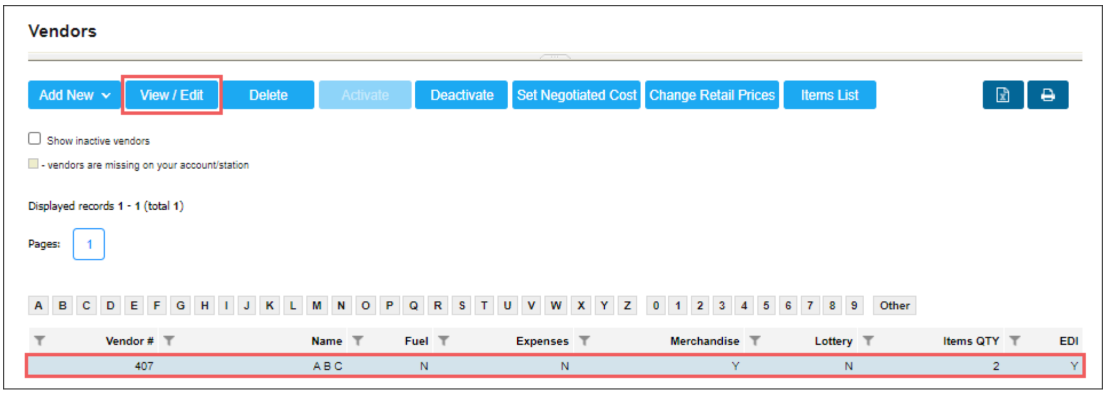
5. Send an email to the vendor to request EDI invoicing. For details, see Sending a Request to the Vendor.

> You can always switch back to the non-EDI mode. To do this, for an EDI vendor, set the **Switch to EDI Vendor** toggle to the **Off** position. As a result, you will stop receiving digitally formatted invoices to your account.

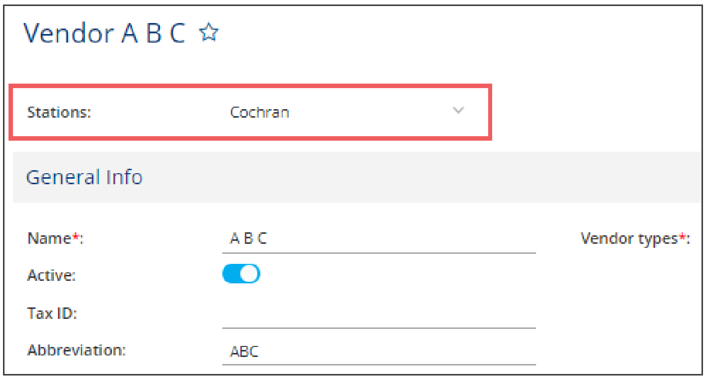
Configuring Vendor Ordering Settings

To configure vendor ordering settings for the station:

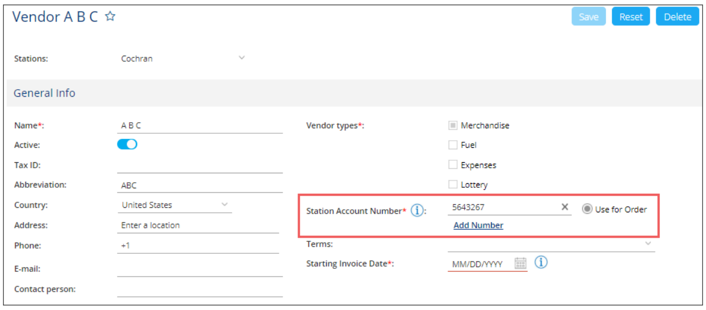
1. Go to **Taxonomy** > **Vendors**.
2. In the **Vendors** list, select the vendor and then click **View/Edit**.



3. In the **Stations** list, select the station for which you want to configure the vendor ordering settings.

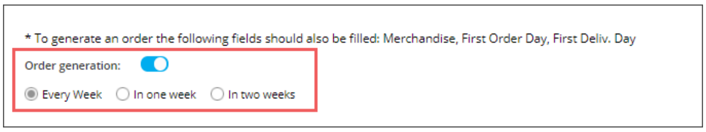


4. In the **Station Account Number** field, do the following:
   a. Click **Add Number**.
   b. Enter the station account number
   c. Select the **Use for Order** option to include the station account number into the order (optional).



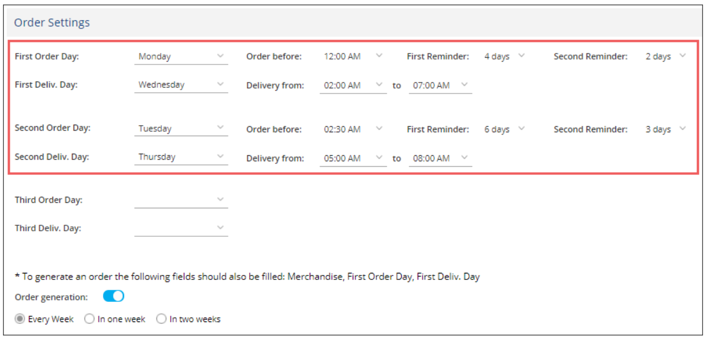
7. Go to **Order Settings** and then do the following:
   a. Set the **Order Generation** toggle to the **On** position.
   b. Select the period of automatic order generation:

      - **Every week**: This value is selected by default.
      - **In one week**
      - **In two weeks**



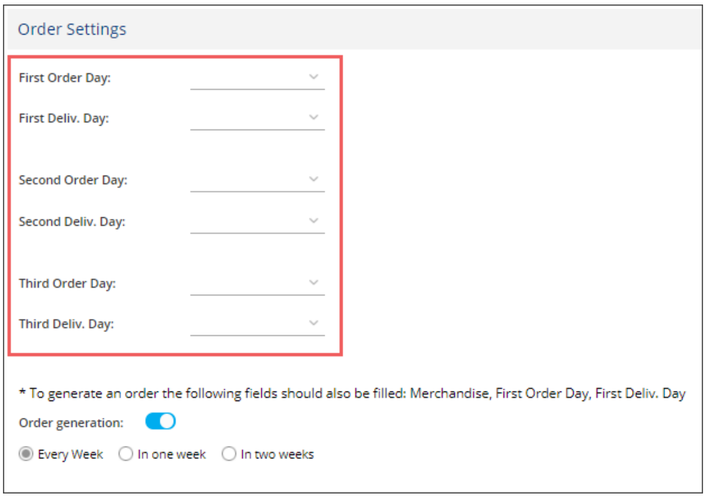
   c. In the **First Order Day** list:
      a. Select the day of the week when the order should be generated.
      b. In the **Order before** list, select the time before which the order should be generated.
      c. In the **First Reminder** list, select the number of days before the first order day when the system should remind you the first time about the order generation.
      d. In the **Second Reminder** list, select the number of days before the first order day when the system should remind you the second time about the order generation.

d. In the **First Deliv. Day** list:
   a. Select the day of order delivering.
   b. In the **Delivery from** and **to** lists, select the time period for the order delivery.
e. In case you purchase the items from this vendor more than once a week, select the order and delivery days in the corresponding lists below (optional).



8. At the top right of vendor editing form, click **Save**.

You can disable the ordering schedule for a vendor at any time. To do this, in the **Order Day** and **Delivery Day** fields, select the blank value at the top of the list.



Activating and Deactivating Vendor

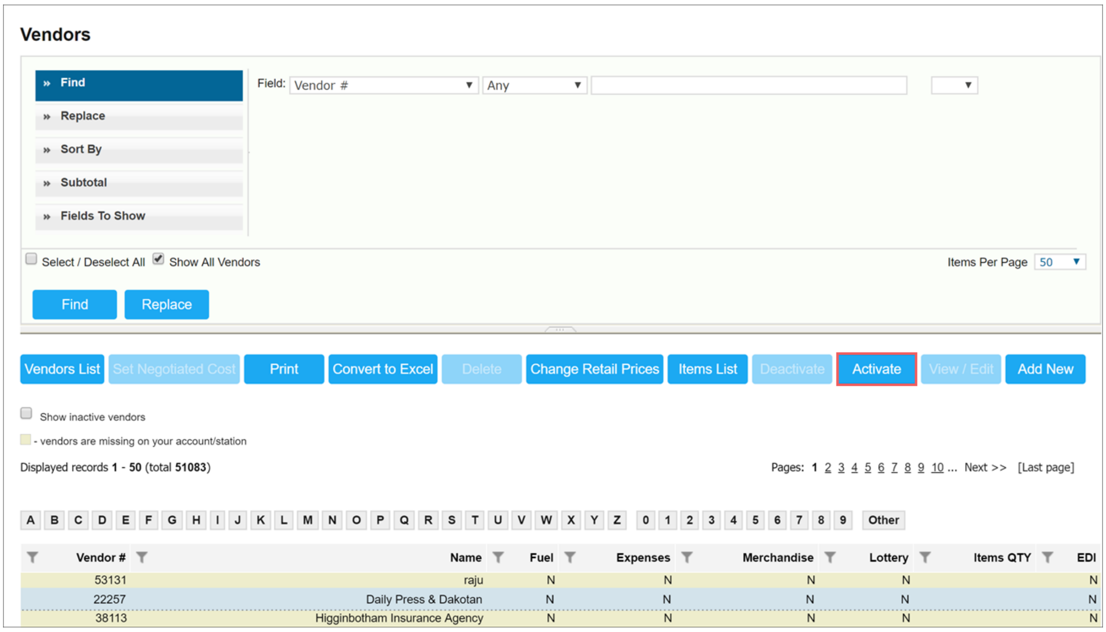
You can activate or deactivate a vendor in one of the following ways:

- From the vendors list:

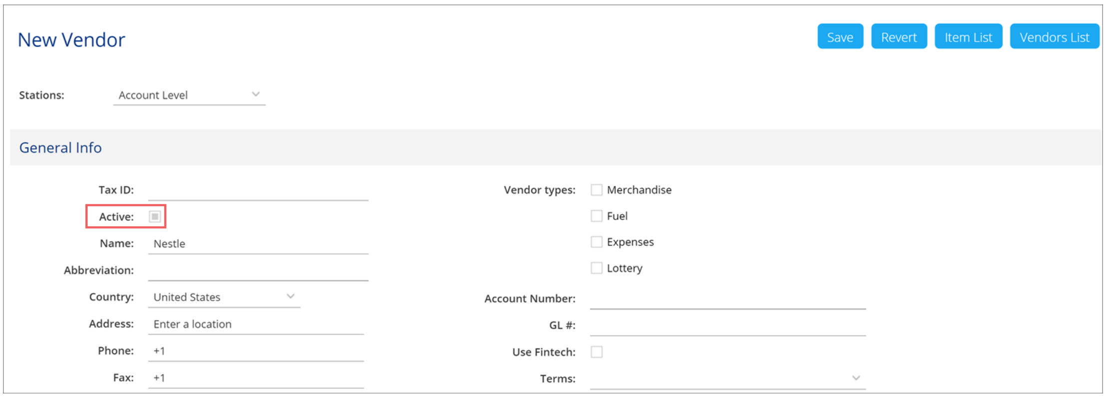
  a. Go to **Taxonomy** > **Vendors**.
  b. To see inactive vendors, click the operational panel switcher > select **Show All Vendors** > click **Find** .

     Inactive vendors are highlighted in brown (optional).

c. Select the vendor and then click **Activate** or **Deactivate**.



- In the **New Vendor** form or the vendor editing form, select or clear the **Active** check box.



Setting Up Taxes and Product Codes for CR Departments

In PIM, you can set up the product code and taxes attributes at the CR department level in bulk. This method can be helpful if you need to set up attributes for CR departments in a number of locations at once.

For setting up product codes and taxes at the CR department level in bulk, PIM leverages location tags. For example, you need to set up taxes for some CR department in several locations on the same territory. In this case, you can create a territory location tag and categorize your locations using this tag. In PIM, you will be able to select a group of these locations by the location tag and configure the tax settings at the CR department level for all locations from this group in bulk.

To be able to set up the product codes and taxes at the CR department level, the user must have the CR Department Attribute Management permission.

To set up product codes and taxes at the CR department level in bulk, you need to perform the following activities:

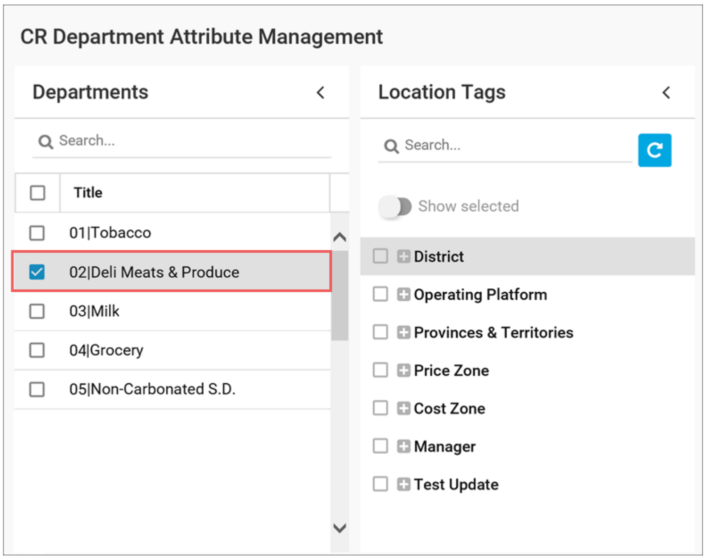
1. Select one or more CR departments for which you need to set up product codes or taxes.
2. Select a location tag by which you want to set up product codes or taxes.
3. Set up product codes or taxes by the location tag.

Selecting CR Departments

You need to select CR departments for which you want to set up product codes or taxes. You can set up product codes and taxes for one CR department or several CR departments at once.

To select one or more CR departments for product codes and taxes setup, follow the steps:

1. Go to **Taxonomy** > **CR Department Attribute Management**.
2. In the **Departments** pane, select check boxes next to one or more CR departments for which you want to set up product codes or taxes.

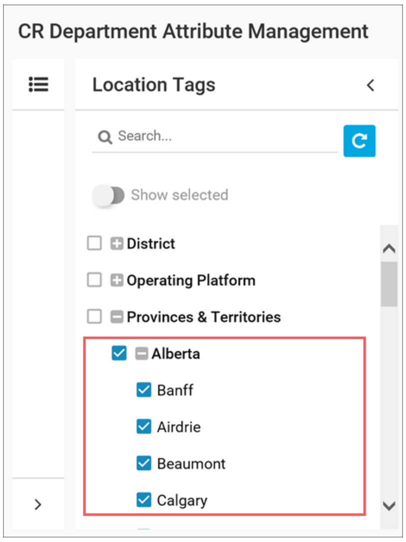


Selecting Locations by Location Tags

You need to select a location tag by which you want to set up product codes or taxes at the CR department level.

To select a location tag, follow the steps:

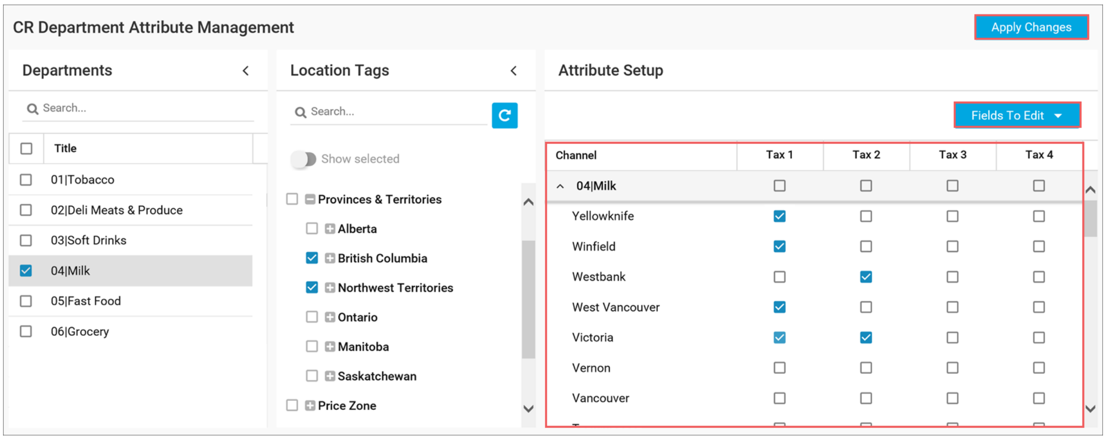
1. On the **CR Department Attribute Management** form, in the **Location Tags** pane, expand the tags tree.
2. Select check boxes next one or more tags by which you want to set up product codes or taxes.



Setting Up Product Codes and Taxes

To set up the product code or taxes for CR departments by the selected location tag, follow the steps:

1. On the right of the **Attribute Setup** pane, click the **Fields to Edit** button and select the attribute for which you want to specify values: **Taxes** to **Product Code**.
2. In the **Attribute Setup** pane, click the arrow icon next to the necessary CR department to expand the list of locations.
3. In the displayed fields, set up the attribute values:
   - For product code: in the **Product Code** field, specify the necessary product codes for all locations in the list.
   - For taxes: in the taxes fields, select the check boxes for taxes that must be applied to items in the CR department.
4. At the top right corner of the **CR Department Attribute Management** form, click the **Apply Changes** button.



Result: The specified attribute values (product code or taxes) are updated for the selected CR department(s) in the locations having the selected location tag(s).

Price Management

The Price Management module in PIM allows you to manage item retail prices for all available locations. Using the module, you can perform the following activities:

- Set up item retail prices: recommended retail, minimum retail and maximum retail
- Set up item cost, negotiated cost and vendor settings

In the Price Management module, you update prices not individually for separate items, but for groups of items in bulk. Item groups are organized by the taxonomy criteria. You can set up prices for the following groups:

- Item categories
- Price groups
- Promo groups
- NACS categories
- GPC categories
- Item tags
- CR departments

Once the retail prices and costs are set up, this data can be sent from the head office down to channels.

> The Price Management menu is available for users with the Head Office role only. For more information on PIM roles, see PIM User Roles.

For information on how to work with the Price Management module, see the following sections:

- Price Management Workflow Overview
- Managing Item Prices

Price Management Workflow Overview

Following are the steps for bulk items prices and costs changes in PIM:

BASIC STEPS	
Detailed Steps	**For details, see...**
STEP 1: A user with the Head Office role makes bulk items prices and costs changes.	
a. Log in to PIM using the Head Office role.	PIM User Roles.
b. Make updates items prices and costs updates for several locations.	See the Setting Up Retail Prices to Price Group procedure as an

BASIC STEPS	
	example.
STEP 2: A user with the Head Office role sends the updated retail prices to the selected location.	
a. Review items updates. **b.** Send items updates to the location.	Sending Updates to Locations.
STEP 3: A user with the Branch Office role receives the items updates.	
a. Log in PIM using the Location role.	PIM User Roles.
b. Review the items updates. **c.** Accept the retail prices received from the user with the Head Office role.	Accepting or Rejecting Changes.

Managing Item Prices

You can use the Price Management module in PIM to update item retail prices and specify cost and vendor settings for locations in bulk.

To manage item prices, you need to perform the following activities:

1. Select the item group for which you want to manage prices
2. Select locations
3. Update prices, cost and vendor settings
4. Send updates to locations

Selecting Item Groups

At the first step, you need to select groups of items whose prices and cost data you want to update.

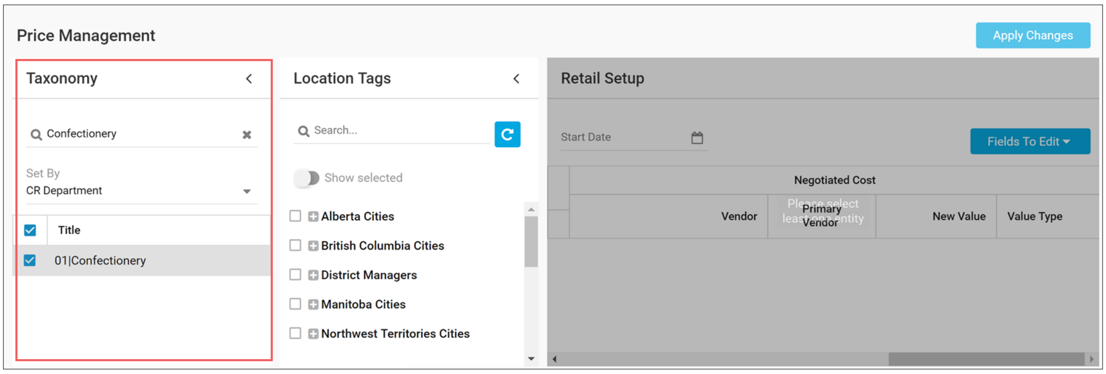
To select the item group:

1. Go to **Price Management**.
2. In the **Taxonomy** section, from the **Set By** list, select the taxonomy object by which items must be grouped:
   - Category
   - Price Group
   - Promo Group
   - NACS Category
   - GPC Category
   - Item Tags

- CR Department

To quickly find the necessary item group, in the search field at the top of the **Set By** list, enter the group name or a part of it. Item groups in the list below will be filtered by the entered name.

3. In the list of groups, select check boxes next to groups of items whose prices you want to update.

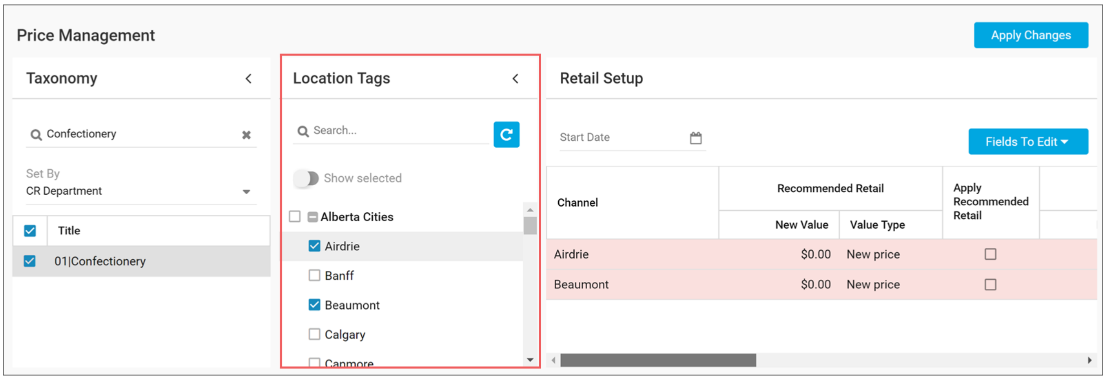


Selecting Locations

You need to specify for which locations you want to update item prices. The Price Management module allows you to update item data for locations by location tags.

To select locations:

1. In the **Location Tags** section, expand the tags tree.
2. Select check boxes next to one or more tags assigned to the necessary locations.



To facilitate work with location tags, you can do the following:

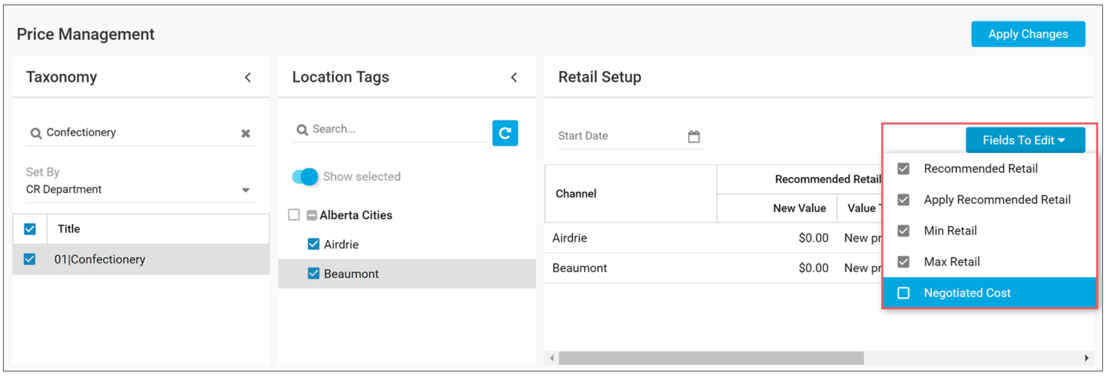
- To quickly find the necessary location tag, in the search field at the top of the tags list, enter the tag name or a part of it. Location tags in the list below will be filtered by the entered name.
- To filter out only selected location tags, set the **Show selected** toggle to the On position.

Updating Prices, Cost and Vendor Settings

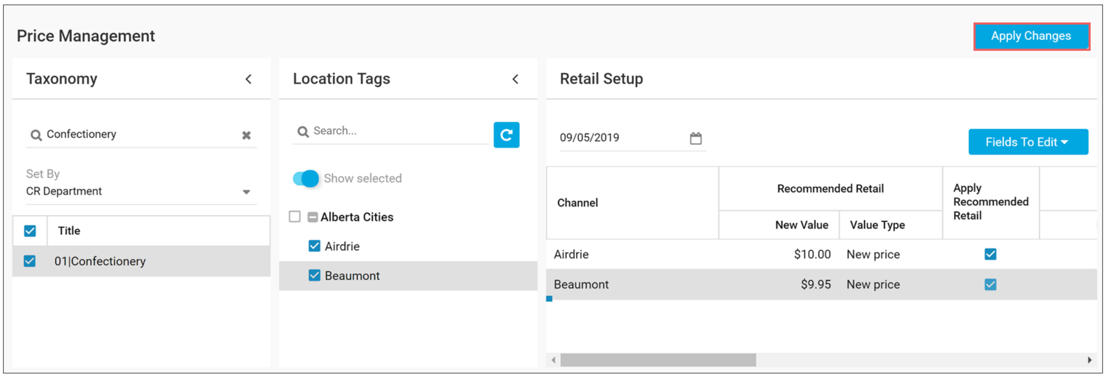
Once the item groups and location tags are selected, you can update the item prices in bulk.

To update the item prices, cost and vendor settings:

1. To the right of the **Retail Setup** section, click **Fields to Edit** and select item attributes that you want to update.



2. In the channels list, for each channel, specify values of the selected attributes:
   - **Recommended Retail**: Specify the purchase price recommended by the account owner.
   - **Apply Recommended Retail**: Enable this option if you want to forbid the recommended retail price change at the locations.
   - **Min Retail**: Specify the least possible retail price value for the locations.
   - **Max Retail**: Specify the greatest possible retail price value for the locations.
   - **Vendor**: From the list, select the vendor from whom the items in the group must be purchased in the locations.
   - **Primary vendor**: Enable this option if the selected vendor must be primary for the locations.
   - **Negotiated Cost**: Specify the originally agreed price with the vendor.
3. At the top of the **Retail Setup** section, in the **Start Date** field, specify the date when the updates must take effect.
4. At the top right of the **Price Management** form, click **Apply Changes**.



Sending Updates to Locations

After you update item prices and costs, the head office manager needs to approve these changes in the **Outgoing** module of PIM. After that, the changes are sent to branch office locations. For more details, see Updates Manager.

Discount Management

With the Discount Management tool, special discounts and enticements or promotions can be set for customers. This will also help drive traffic and sales. PIM supports various promotion types from simple price reductions for a specific period of time to more advanced offers based either on the sale of specific quantities or a combination of items in a transaction. The time span for the promotion and locations where it will be in effect can be defined.

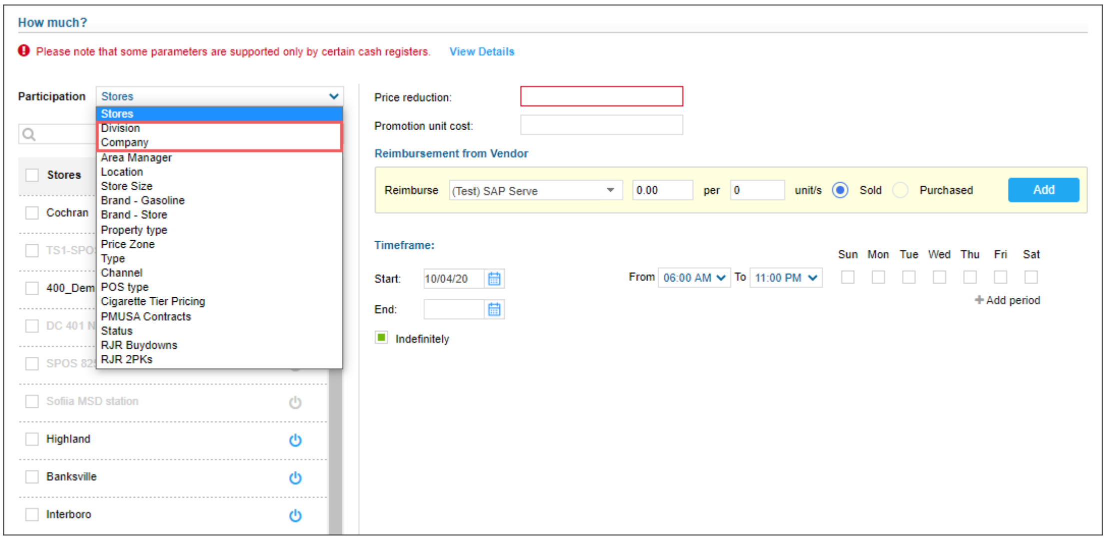
Promotions can be applied to specific Price Book items; however, it is usually more efficient to use Promo Groups made up of items that satisfy the requirements of the promotion or combine both the Promo Groups and items in the single promotion. The Promotions tool and Promotions Groups tool can be used in conjunction—to define the circumstances under which the buyer is offered the promotion and to select the items to be included in it.

Workflow Overview

Following are the steps for setting up a promotion in PIM:

BASIC STEPS	
Detailed Steps	**For more details, see...**
STEP 1: A user with the Head Office role creates a promotion.	
a. Log in PIM using the Head Office role.	PIM User Roles.
b. (Optional) Create a promo group or make sure that you already have one that satisfies your needs.	Promo Groups.
c. Add a new promotion*.	Adding New Promotion.
STEP 2: A user with the Head Office role sends the newly created promotion to a location.	
a. Review promotions updates. b. Send promotions updates to the location.	Sending Updates to Locations.
STEP 3: A user with the Location role accepts the newly created promotion.	
a. Log in PIM using the Location role.	PIM User Roles.
b. Review the promotions updates. c. Accept the promotion received from the user with the Head Office role.	Accepting or Rejecting Changes.

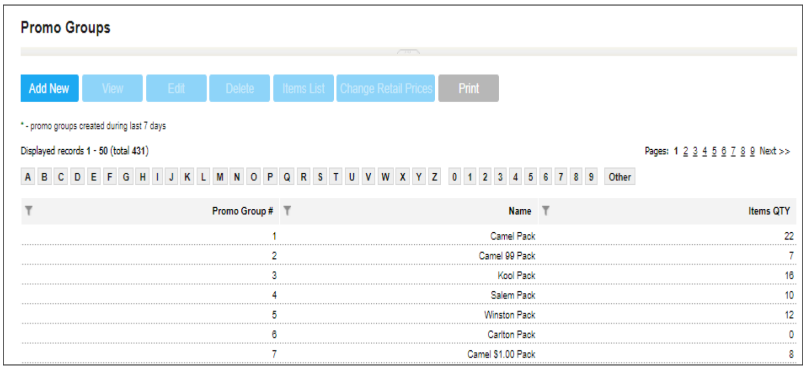
* Make sure the location type, defined for your promotion at **How much?** section > **Participating** list, is not equal to **Division** or **Company** as these two types of location are not supported in PIM.



When the promotion is created, you can view, edit, continue, and end it. For more information on how to work with promotions, see Working with Promotions.

Promo Groups

Promo Groups allow the user to include a number of items in a given marketing promotion.



Only users with appropriate permissions can create, edit, and delete the promo groups.

HOW TO ACCESS PROMO GROUPS LIST

To open the list of promo groups, go to **Taxonomy** > **Promo Groups**.

All new (created within the last seven days) promo groups are marked with the green asterisk.

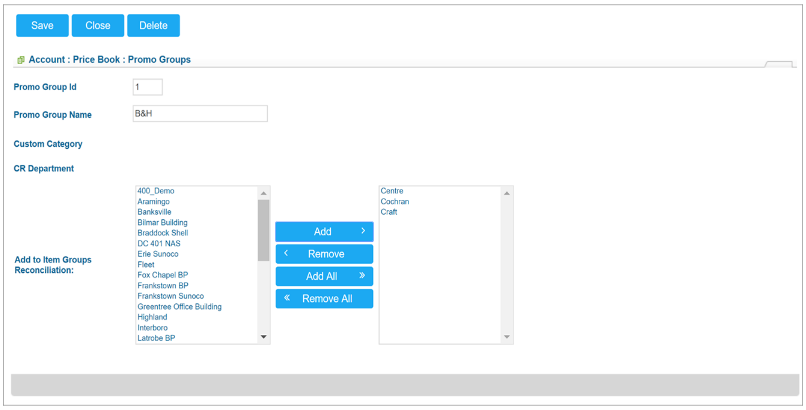
HOW TO ADD OR EDIT PROMO GROUPS

To open the form for editing a promo group, click **Add New** or select a group in the list and click **Edit**.

Items in the **Promo Groups** form include:

- **Promo Group ID**: The promo group number
- **Promo Group Name**: The name of the promo group
- **Custom Category**: The category to which the items of this group belong
- **CR Department**: The cash register department to which the items in this group belong

Promo Groups can be combined with the regular items to create the Price Each Mix promotions.



The Related Information section includes:

- **Promo Groups List**: Displays a report with a list of the groups
- **Promo Group Items**: Displays a list of the items included in the selected promo group

HOW TO PRINT PROMO GROUPS LIST

To view the list of promo groups in the printer friendly view, open the promo groups list and click the **Print** button at the top of the list.

PIM loads the list of promo groups to a file of the PDF format and saves this file to the default downloads folder on the computer. To open the file, locate the downloaded file on the computer and double-click it.

List of Promo Groups

Greyhound

CSTORE OFFICE
www.cstoreoffice.com

PROMO GROUP #	NAME	ITEMS QTY
1	B&H	1
2	BASIC	24
3	CAMEL 99	5
4	CAMEL CORE	6
5	CAPRI	90
6	CIMARRON	2
7	DORAL	3
8	L&M	10
9	GPC	14
10	Pall Mall .50c off	9
11	KENT	1
12	KOOL	11
14	Marlboro Mainline	21
15	MAVERICK	13
16	MERIT	4
17	MISTY	6
18	Camel Turkish Blnd	6
19	NEWPORT	15
20	PALL MALL	14
21	PARLAMENT	9
22	SALEM	16
23	USA	14
24	MARL .50 OFF PK	0
26	VIRG	16
27	WINSTON	18
28	B&H-CART	1

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Promotion Types

With Petrosoft products, you may configure and offer to your customers a wide range of promotions.

All promotions are configured via the PIM interface and available within the PIM subscription. Whereas for certain promotion types, you need to purchase additional Petrosoft products.

PIM promotions are described below and divided into the following two groups:

- Regular promotions
- Combo promotions

Additionally, you may purchase the following Petrosoft products to benefit from corresponding promotions:

Scan Data Product

Promotion Type	Reference Materials

- Outlet Multi Pack	• About Scan Data • How to configure Scan Data promotions
- Account Funded	
- Manufacturer Multi Pack	
- Manufacturer Buy-Downs	

Scan Data Loyalty Product

Promotion Type	Reference Materials
- Buy X, Get $ Off Instantly	• About Scan Data Loyalty • How to configure Scan Data

Go Loyalty Product

Promotion Type	Reference Materials
- Buy X, Get Fuel Discount Instantly	• About Go Loyalty • Configuring Go Loyalty Promotions
- Buy X, Get Y Free Instantly	
- Buy X in Period, Get Y Free	
- Earn Points Merchandise and/or Fuel	
- Get Permanent Fuel Discount	
- Spend $, Get Fuel Discount Instantly	
- Spend $ in Period, Get Fuel Discount Next Period	
- Spend $ in Period, Get Fuel Discount Next Transaction	

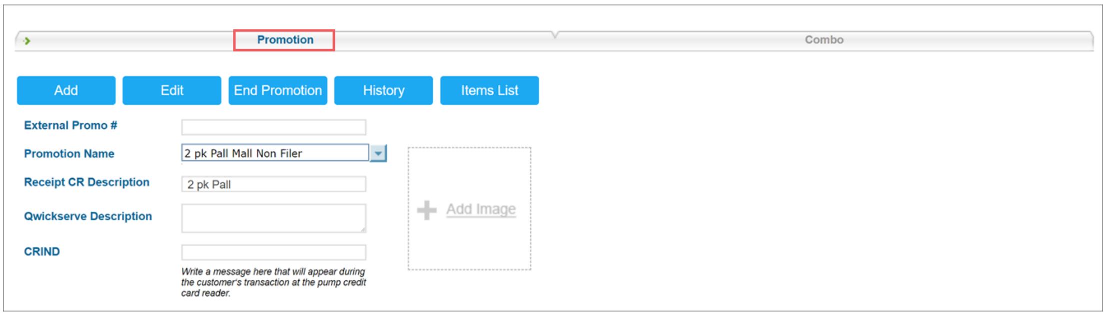
Regular Promotions

Regular promotions allow the defining of a discount on specific items or groups of related items. PIM offers the following types of regular promotions:

- Coupon: A discount on specific items that is activated if a customer shows a coupon at the cash register.
- Happy Hours: A specified discount on items depending on certain days and hours.
- Link Saver: A discount that is applied to items from promo groups in case these items are purchased together with items from the primary (or trigger) promo group.
- Mix & Match: A discount for buying a combination of items in a single purchase, for example, a cup of coffee and donut.
- New Price: A new price is specified and applied to specific items at a certain period of time.
- Price Each Mix: A discount for buying at least one item from two or more groups of promoted items.
- Price Modifier: A new price for buying two or more items of the same type, rather than buying one item.

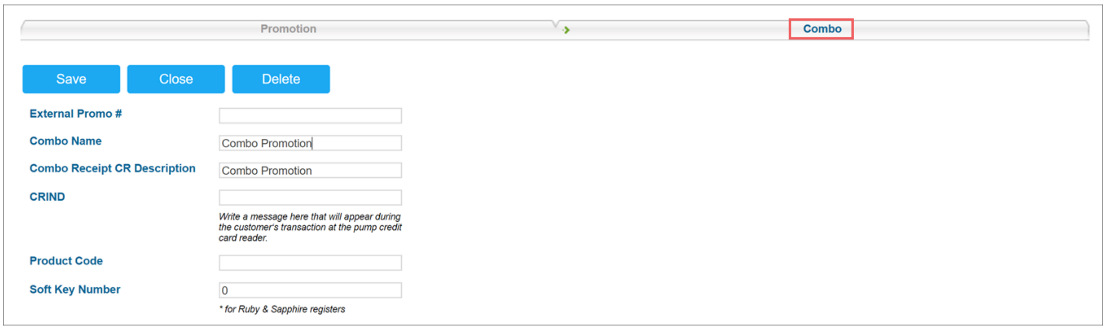
- Price Reduction: A money discount that will be specified and applied to specific items at a certain period of time.

Regular promotions can be managed using the **Promotion** form in PIM. For more details, see Promotion Setup Form.



Combo Promotions

A combo is a special type of promotion that includes from two to five items with a specific predefined price for each item. Combo promotions can be managed using the **Combo** form in PIM. For more details, see Combo Setup Form.



Coupon Promotion

The Coupon promotion gives customers a discount when they show coupons at the cash register.

When setting up a Coupon promotion, the types of coupons that are going to be used can be selected:

- Predefined: For this coupon type, the type and amount of the discount are pre-configured in the back office system beforehand. When a coupon is activated at the cash register, the specified discount type and amount are applied to the promoted items in the cart.
- Promoted: For this coupon type, the type of the discount is pre-configured in the back office system beforehand. The discount amount, however, is not specified. When a coupon is activated at the cash register, the cashier enters the discount amount manually.

Depending on the coupon type, Coupon promotions can be set to offer the following discount types:

- Predefined coupon promotion:
  - Amount: reduces the item price by the predefined amount
  - Percent: reduces the item price by the predefined percent rate
  - New Price: replaces the current item price with the predefined price value
- Prompted coupon promotion:
  - Prompted amount: reduces the item price by the amount value entered by a cashier
  - Prompted percent: reduces the item price by the percent rate entered by a cashier
  - Prompted new price: replaces the current item price with the price value entered by a cashier

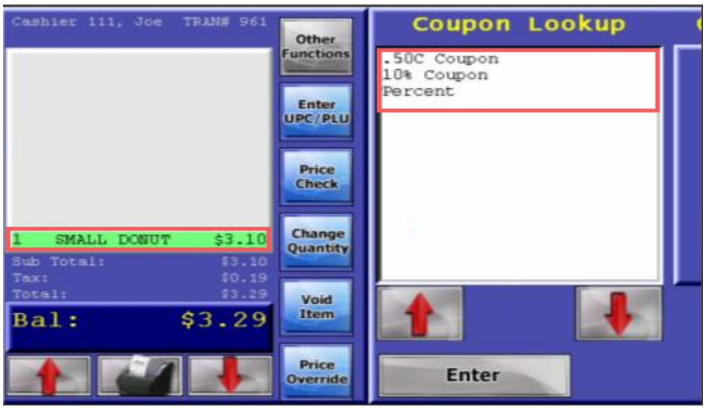
> For information on what cash registers are compatible with Coupon promotions, see Compatible Cash Registers.

How Coupon Promotion Works

A typical workflow for the Coupon promotion is the following:

1. When the cashier scans items in the shopping cart, available coupon promotions are displayed on the cash register for each item.
2. A customer shows his or her coupons to the cashier.
3. The cashier verifies the presented coupons and then selects corresponding coupon promotions

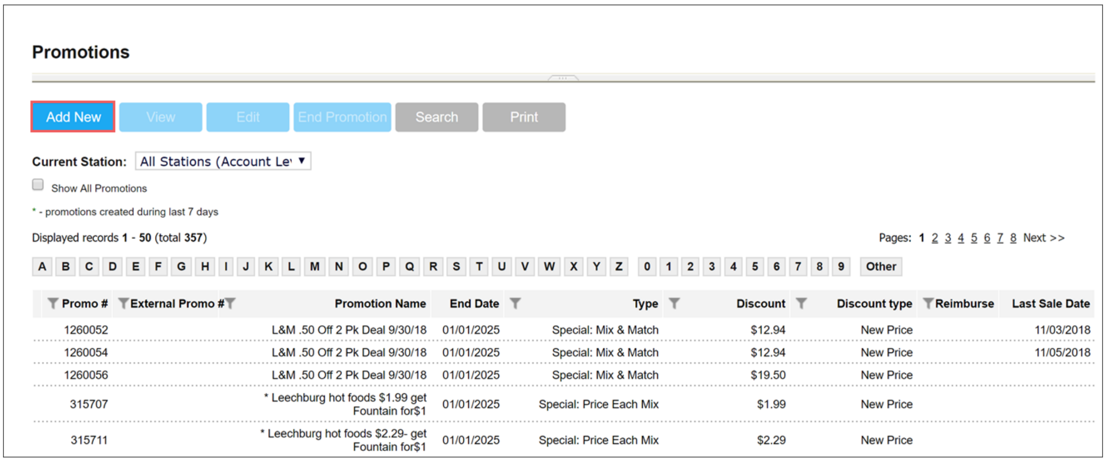
on the cash register to apply them to the items.



Setting Up Coupon Promotions

To set up a Coupon promotion:

1. Go to **Discount Management**.
2. At the top of the **Promotions** form, click **Add New**.



Promotions

Add New | View | Edit | End Promotion | Search | Print

Current Station: All Stations (Account Le

Show All Promotions

* - promotions created during last 7 days

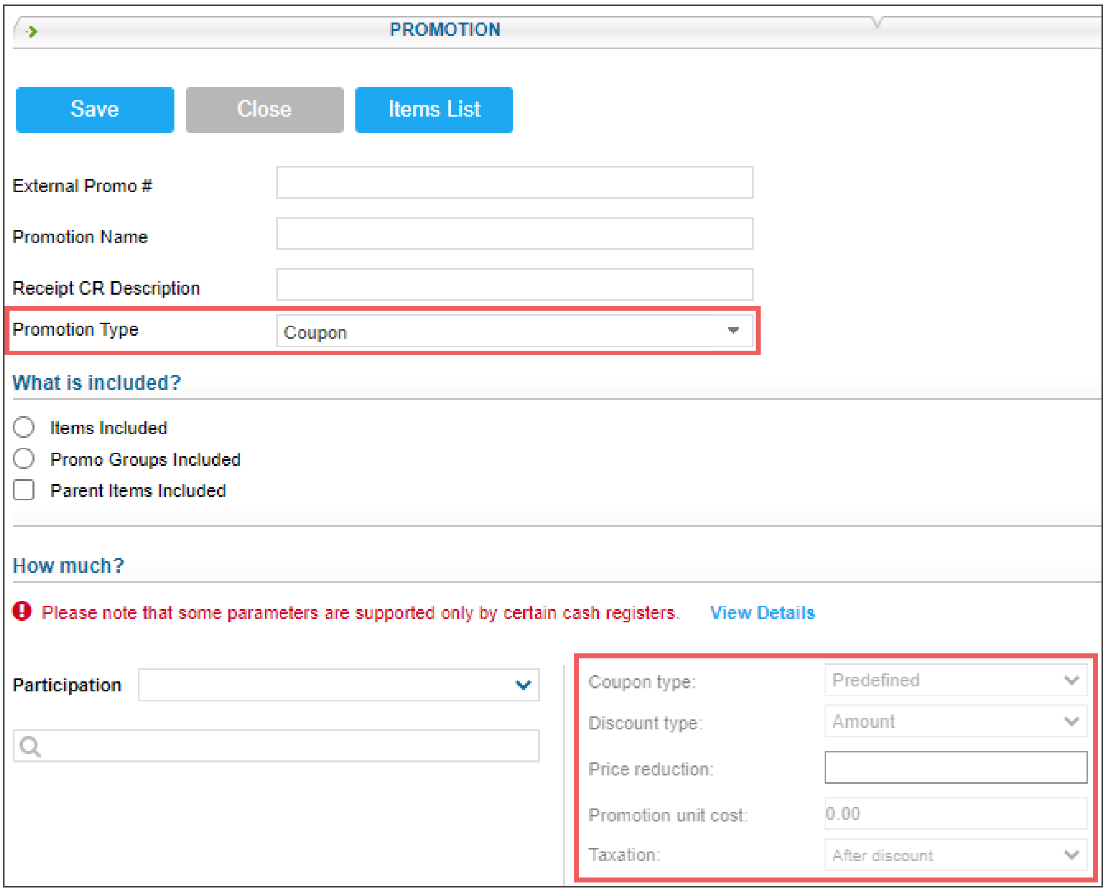
Displayed records **1** - **50** (total **357**)

Pages: **1** 2 3 4 5 6 7 8 Next >>

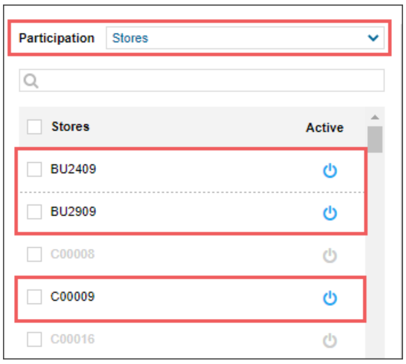
A B C D E F G H I J K L M N O P Q R S T U V W X Y Z 0 1 2 3 4 5 6 7 8 9 Other

Promo #	External Promo #	Promotion Name	End Date	Type	Discount	Discount type	Reimburse	Last Sale Date
1260052		L&M .50 Off 2 Pk Deal 9/30/18	01/01/2025	Special: Mix & Match	$12.94	New Price		11/03/2018
1260054		L&M .50 Off 2 Pk Deal 9/30/18	01/01/2025	Special: Mix & Match	$12.94	New Price		11/05/2018
1260056		L&M .50 Off 2 Pk Deal 9/30/18	01/01/2025	Special: Mix & Match	$19.50	New Price		
315707		* Leechburg hot foods $1.99 get Fountain for$1	01/01/2025	Special: Price Each Mix	$1.99	New Price		
315711		* Leechburg hot foods $2.29- get Fountain for$1	01/01/2025	Special: Price Each Mix	$2.29	New Price		

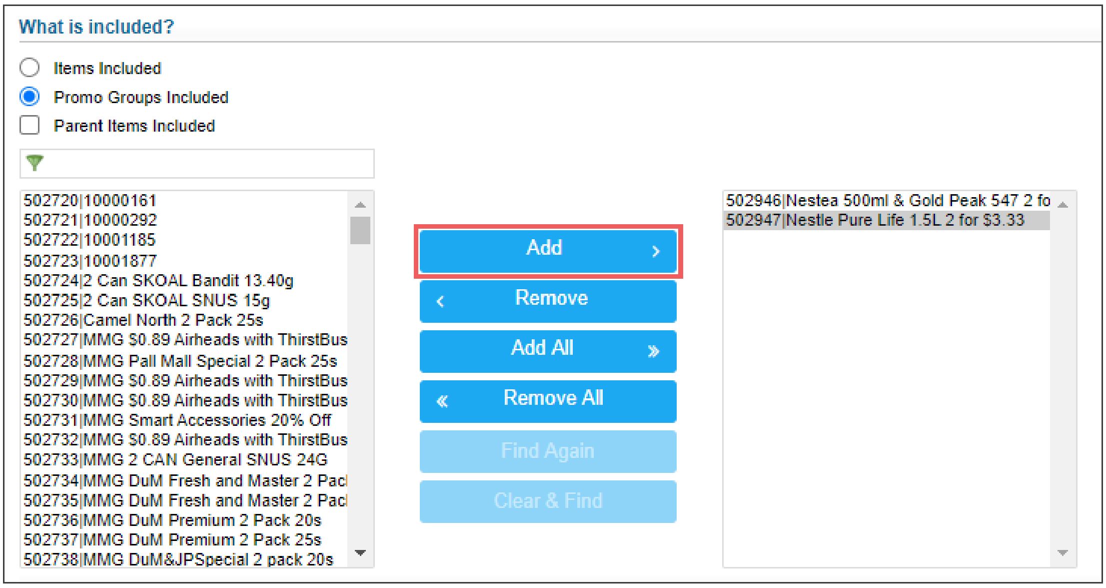
3. In the **Promotion Name** field, enter the name for the new promotion.
4. In the **Receipt CR Description** field, specify the promotion description that must be displayed on cash register receipts. The name length must not exceed ten characters including spaces. By default, the promotion name is displayed in this field.
5. In the **Promotion Type** list, select **Coupon**.
   Result: The promotion default settings are uploaded in the **How much?** section according to the selected promotion type.



6. In the **How much** section:
   a. In the **Participation** list, select the type of objects for which the promotion must be activated: **Stores**, **Division**, **Company**, and so on.
   b. In the list of objects below that is opened for the selected type of objects, click the power icon on the right of the object for which you want to activate the promotion.



7. In the **What is included?** section, select the desired additions to be included in the promotion. You can add items and promo groups. For more details, see Promotion Setup Form.



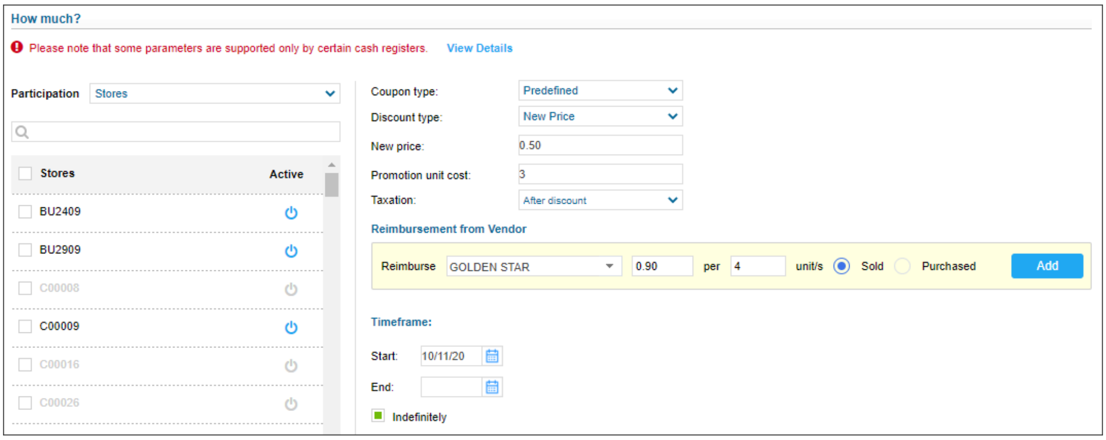
8. In the **How much?** section, configure the following promotion's basic parameters:
   a. In the **Coupon type** field, select **Predefined** or **Prompted**.
   b. In the **Discount type** list, select the type of discount that you want to set for the promotion:
      - **New price**: Select this option if a new price for the promoted items is to be set.
      - **Amount**: Select this option if a discount as the exact amount is to be specified.
      - **Percent**: Select this option if a discount as the percent rate is to be specified.
   c. In the **New price** or **Price reduction** field below, specify the new price for promoted items or the discount value, depending on the discount type that has been selected.

   > The New price or Price reduction field is mandatory for the Coupon promotion.

   d. In the **Promotion unit cost** field, specify the item cost for the promotion.
   e. In the **Taxation** list, select when the taxes must be calculated for items added to the promotion: **After discount** or **Before discount**.

9. Configure the following promotion's settings:
   - **Reimbursement from Vendor**
   - **Timeframe**: Only days can be configured for this promotion type without hours.

   > The **Reimbursement from Vendor** and **Timeframe** settings are configured equally for all promotion types. For more information on how to configure them, see Promotion Setup Form.



10. Scroll down to the **Promo Results** table and make sure that the promotion is set up correctly. The promo results are calculated by the following formulas:

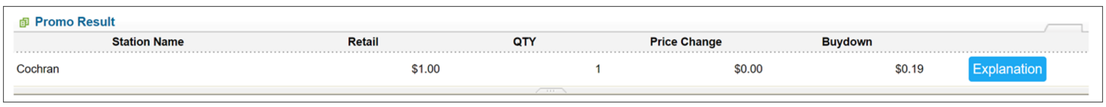
- Retail:
  - New Price: *Retail = Promo Price*
  - Amount: *Retail = Current Retail - Amount Discount*
  - Percent discount: *Retail = Current Retail - ((Current Retail / 100) * Discount Percent)*
- Price Change:
  - New Price: *Price Change = (Promo Price - Current Retail) + Buydowns*
  - Amount: *Price Change = -(Amount Discount) + Buydowns*
  - Percent discount: Price Change = - *(Percent Discount*Current Retail/100) + Buydowns*

For example, you set up a promotion in the following way:

- The initial retail price for the promoted item is $1.19.
- The promotion price is $1.00.
- The reimbursement amount is $0.19.

In this case, in the **Promo Results** section, you will see the following values:

- Retail: $1.00
- Price Change: $1.00 - $1.19 + $0.19 = $0.00



To view the explanation about the promotion results, to the right of the necessary location name, click **Explanation**.

11. At the top of the promotion form, click **Save** to save the changes.

Happy Hours Promotion

The Happy Hours promotion gives customers a discount on certain items on specific weekdays and at specific times during the day. Promotions of this type help drive sales in not too busy parts of the week or day. For example, a Happy Hours promotion can be set up to provide a 20% discount on items in the menu between 11.00 AM and 2.00 PM Monday through Friday.

The Happy Hours promotion is actually a variation of the existing promotion types and is set up with the help of these promotions. However, while most promotions give a 'permanent' discount that is in effect for the whole duration of the promotion, the Happy Hours promotion allows you to define the 'schedule' when the discount must be active.

> For information on what cash registers are compatible with Happy Hours promotions, see Compatible Cash Registers.

How Happy Hours Promotion Works

A store has lentil soup on the menu which has a regular price of $6.00. A Happy Hours promotion can be created and its settings defined in the following way:

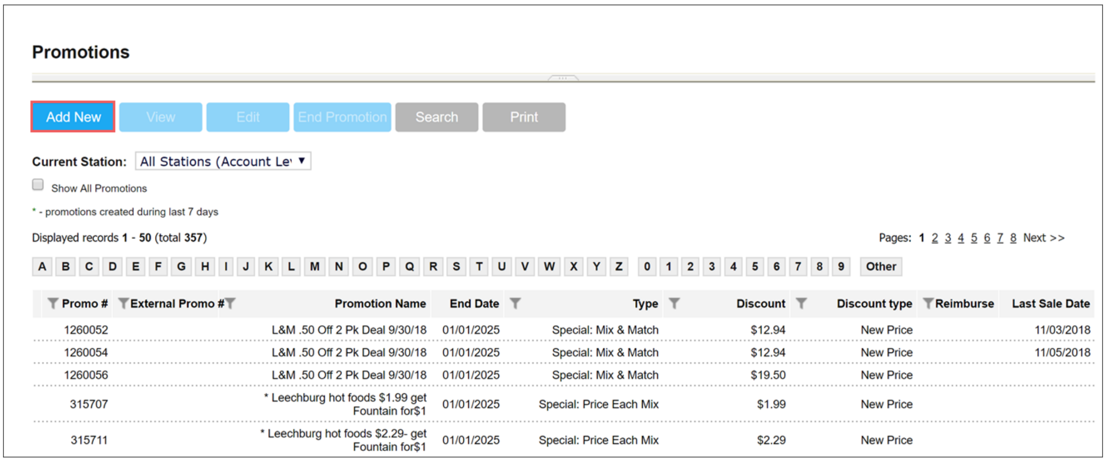
- Promotion type - Price reduction
- Price reduction value - $2.00
- Promotion schedule - 11:00 AM-04:00 PM Monday through Friday

In this case, if a customer orders the lentil soup on Saturday at 11:00 AM, its cost will be $6.00. If a customer orders the lentil soup on Monday at 12.00 PM, its price will be $4.00.

Setting Up Happy Hours Promotion

To set up a Happy Hours promotion:

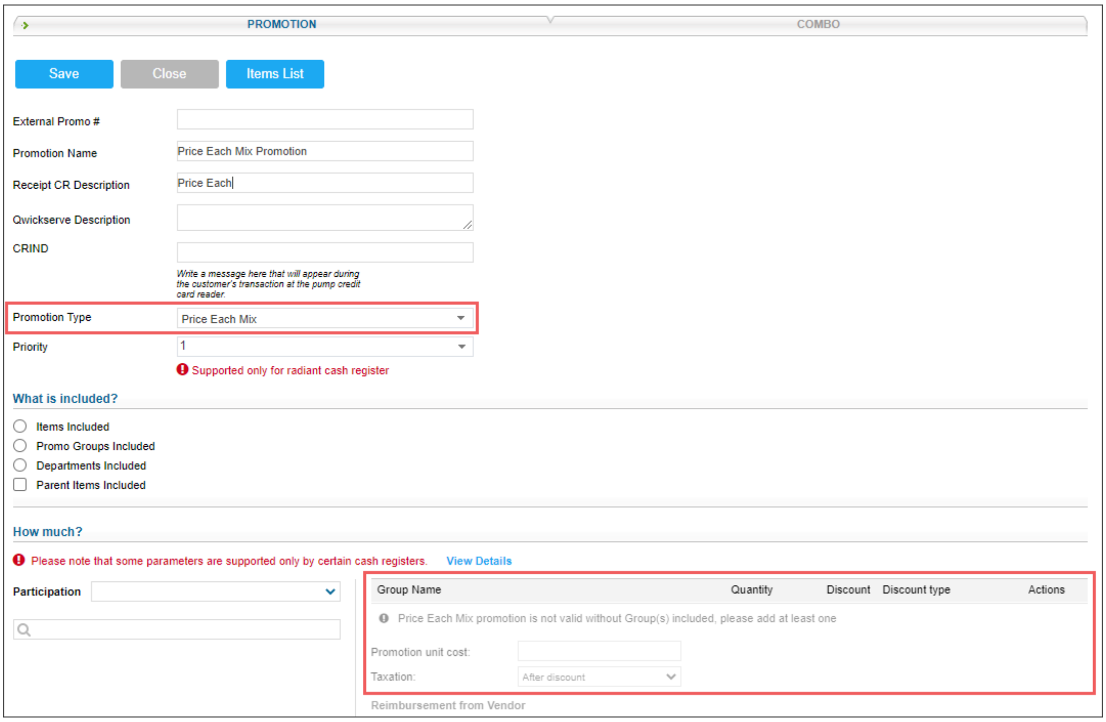
1. Go to **Discount Management**.
2. At the top of the **Promotions** form, click **Add New**.



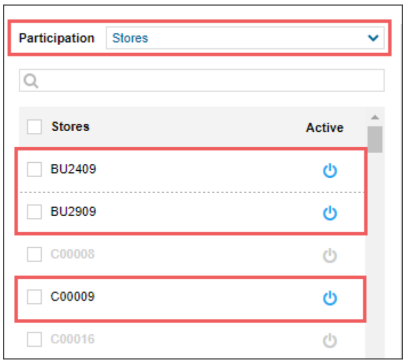
3. In the **Promotion Name** field, enter the name for the new promotion.
4. In the **Receipt CR Description** field, specify the promotion description that must be displayed on cash register receipts. The name length must not exceed ten characters including spaces. By default, the promotion name is displayed in this field.
5. In the **Promotion Type** list, select the promotion type that may be configured as the Happy Hours promotion.

> For more information on what promotion and CR types support for the Happy Hours parameter, see Compatible Cash Registers.

Result: The promotion default settings are uploaded in the **How much?** section according to the selected promotion type.

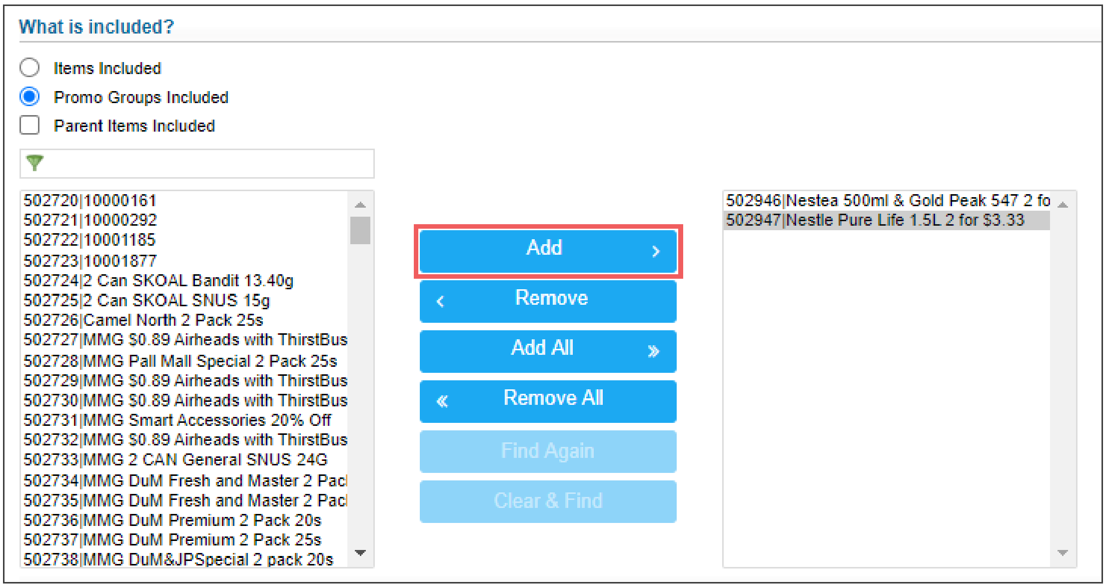


6. In the **How much** section:
   a. In the **Participation** list, select the type of objects for which the promotion must be activated: **Stores**, **Division**, **Company**, and so on.
   b. In the list of objects below that is opened for the selected type of objects, click the power icon on the right of the object for which you want to activate the promotion.



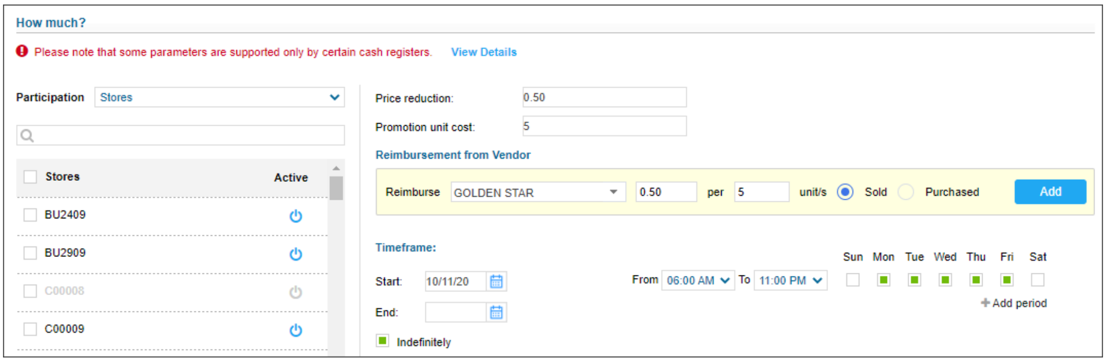
7. In the **What is included** section, select what you want to add to the promotion. You can add items

and promo groups. For details, see Promotion Setup Form.



8. In the **How much** section, specify the promotion parameters depending on the selected promotion type.
9. Configure the following promotion's settings:
    - **Reimbursement from Vendor**
    - **Timeframe**

> The **Reimbursement from Vendor** and **Timeframe** settings are configured equally for all promotion types. For more information on how to configure them, see Promotion Setup Form.



10. Scroll down to the **Promo Results** table and make sure that the promotion is set up correctly. The promo results depend on the type of promotion that was selected. For details, see Promotion Types.
11. At the top of the promotion form, click **Save** to save the changes.

Link Saver Promotion

The Link Saver promotion is a variation of the Price Each Mix promotion. The Link Saver promotion includes two or more groups of promoted items:

- Primary, or trigger group: Items in this group are sold at their regular price.
- Linked promo group: Items in this group are sold with a discount if they are bought together with the items from the trigger group.

A typical example of the Linked Saver promotion is the following: '*Buy two burgers and get a fountain drink at a 20% discount*'.

For items in the trigger group, the discount is not specified since these items are sold at their regular price. For items in the linked promo group, the Link Saver promotion supports the following types of discounts:

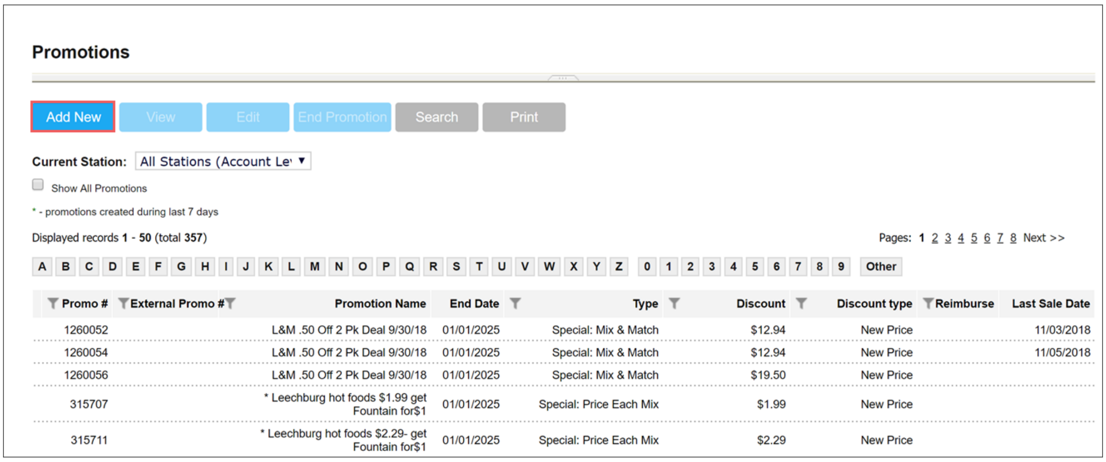
- New price: A new price for promoted items can be specified.
- Discount amount: A discount as the exact amount can be specified.
- Discount rate in percent: A discount as the percent rate can be specified.

> For information on what cash registers are compatible with Link Saver promotions, see Compatible Cash Registers.

Setting Up Link Saver Promotions

To set up a Link Saver promotion:

1. Go to **Discount Management**.
2. At the top of the **Promotions** form, click **Add New**.

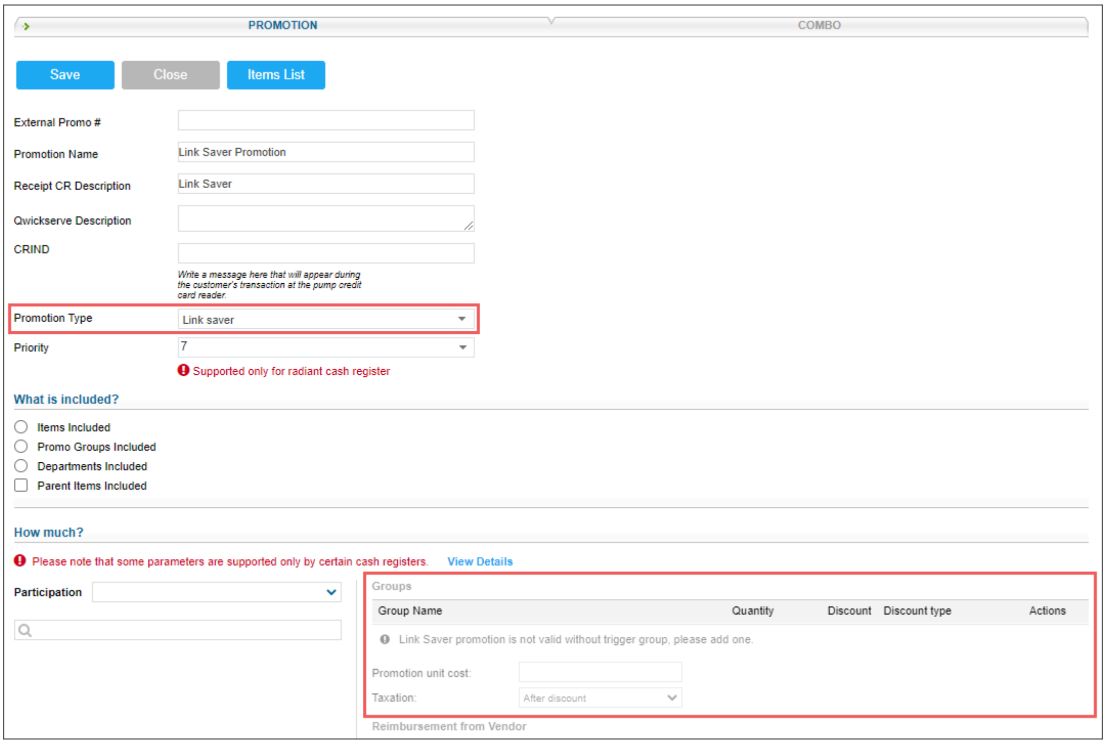


3. In the **Promotion Name** field, enter the name for the new promotion.

4. In the **Receipt CR Description** field, specify the promotion description that must be displayed on cash register receipts. The name length must not exceed ten characters including spaces. By default, the promotion name is displayed in this field.
5. In the **Promotion Type** list, select **Link Saver**.

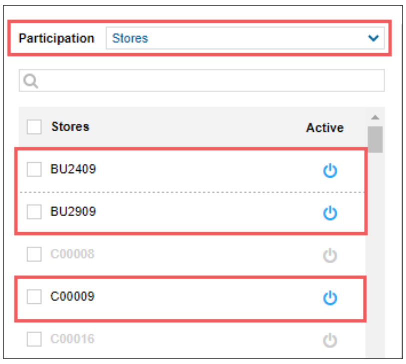
   Result: The promotion default settings are uploaded in the **How much?** section according to the selected promotion type.
6. In the **Priority** list, in case you have several promotions for same group of items, specify the priority in which the promotion will be applied on the cash register in order to be in compliance with the vendor policy. Possible values:
   - **Empty**: Leave the **Priority** field blank, if you have only one promotion for one certain group of items.
   - **From 0 to 10**: Define the promotion's priority by setting up the lowest value to the highest priority level.

   > The **Priority** field is supported only by the Radiant cash registers and available. For more information about promotion limitations depending on the CR type, see Compatible Cash Registers.



7. In the **How much** section:
   a. In the **Participation** list, select the type of objects for which the promotion must be activated: **Stores**, **Division**, **Company**, and so on.

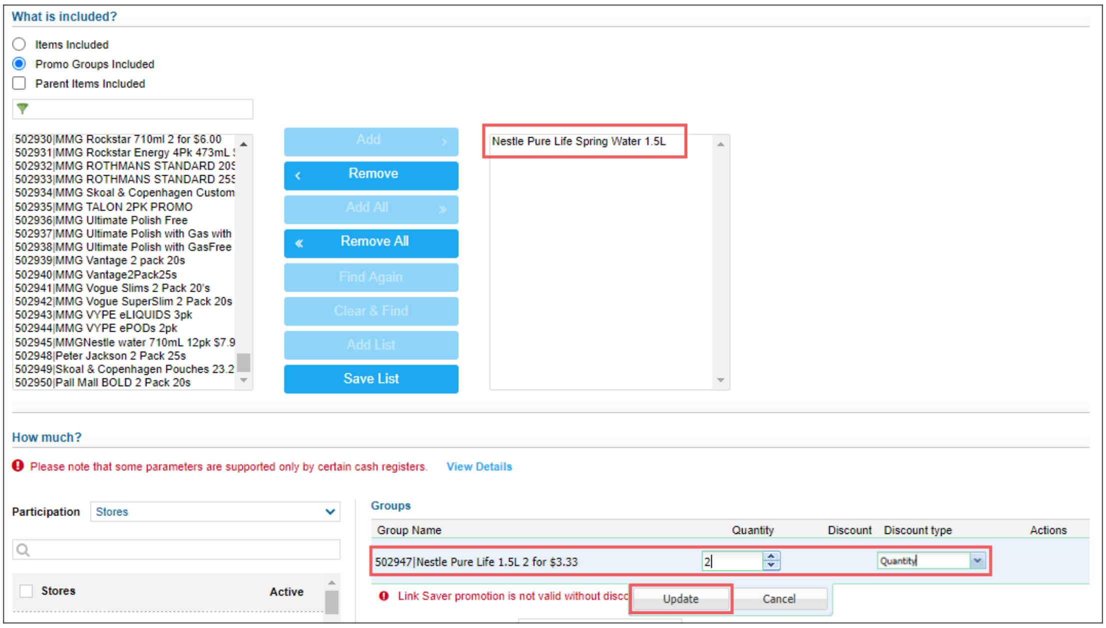
b. In the list of objects below that is opened for the selected type of objects, click the power icon on the right of the object for which you want to activate the promotion.



8. Configure the promotion's trigger group:
   a. In the **What is included?** section, click **Promo Groups Included**.
   b. In the left column, select the promo group and click the **Add** button.
      Result: Selected promo group is added to the right column.
   c. In the right column, select the promo group and click the **Add List** button.
      Result: The promo group is added to the **How much?** section > promo groups.
   d. In the **How much?** section > promo groups:
      a. Double-click added promo group.
      b. (For SmartPOS only) In the **Discount Type** list, select one of the following types of applied discount:
         - **Quantity**: Select this option of you want to specify the number of items a customer must purchase.
         - **Spent Amount**: Select this option of you want to specify the amount of money a customer must purchase.
      c. In the **Quantity** field, depending on the value selected in the Discount Type list, specify one of the following values:
         - If **Quantity** is selected, specify the number of items that a customer must purchase for the promotion to take effect.
         - If **Spent Amount** is selected, specify the amount of money that a customer must purchase for the promotion to take effect.

> The Spent Amount option is supported only by the SmartPOS cash register. For more information about promotion limitations depending on the CR type, see Compatible Cash Registers.

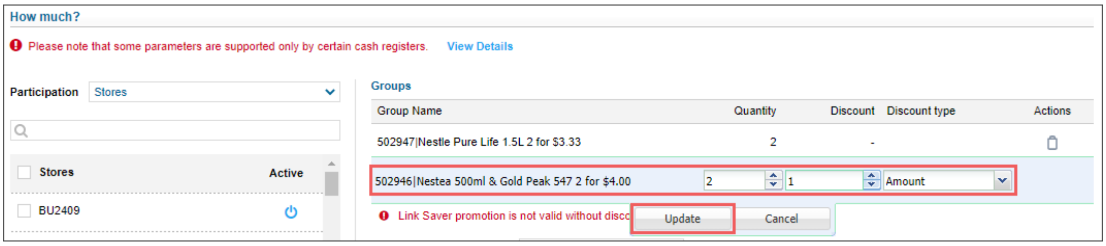
d. Click the **Update** button.



9. Add the promotion's discount group:
   a. In the **What is included?** section, click **Promo Groups Included**.
   b. In the left column, select the promo group and click the **Add** button.
   Result: Selected promo group is added to the right column.
   c. In the right column, select the promo group and click the **Add List** button.
   Result: The promo group is added to the **How much?** section > promo groups.
   d. In the **How much?** section > promo groups, double-click added promo group and specify the following settings:

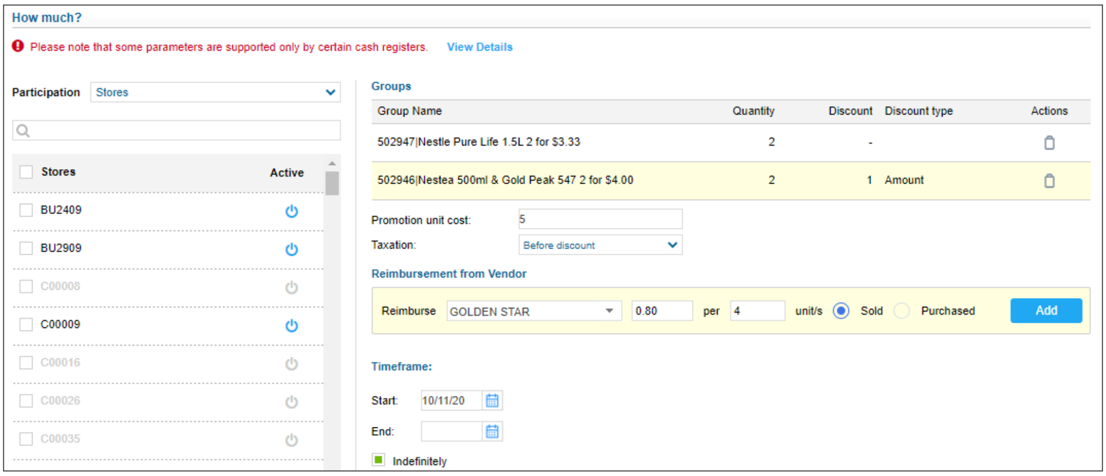
- In the **Quantity** field, specify the number of items that a customer must purchase for the promotion to take effect.
- In the **Discount type** field, select the type of discount that you want to set for the promotion:
  - **New price**: Select this option if a new price for items in the group is to be set.
  - **Amount**: Select this option if a discount as the exact amount is to be specified.
  - **Percent**: Select this option if a discount as the percent rate is to be specified.
- In the **Discount** field, specify the new price or the discount value, depending on the discount type that has been selected. This field is mandatory for the Link Saver promotion

e. Click the **Update** button.



10. In the **Promotion unit cost** field, specify the item cost for the promotion.
11. In the **Taxation** list, select when the taxes must be calculated for items added to the promotion: **After discount** or **Before discount**.
12. Configure the following promotion's settings:
    - **Reimbursement from Vendor**
    - **Timeframe**: Only days can be configured for this promotion type without hours.

> The **Reimbursement from Vendor** and **Timeframe** settings are configured equally for all promotion types. For more information on how to configure them, see Promotion Setup Form.



13. Scroll down to the **Promo Results** table and make sure that the promotion is set up correctly. The results are calculated for each group separately and then summed up for the **Price Change** values. The promo results are calculated by the following formulas:
    - Retail:
        - New Price: *Retail = Promo Price*
        - Amount: *Retail = Current Retail * QTY - Amount Discount*
        - Percent discount: *Retail = Current Retail - ((Current Retail / 100) * Discount Percent)*QTY*
    - Price Change:

- New Price: *Price Change = Promo Price - (Current Retail * QTY) + Buydowns*
- Amount: *Price Change = -(Amount Discount * QTY) + Buydowns*
- Percent discount: Price Change = *-((Percent Discount*Current Retail/100) * QTY) + Buydowns*

For example, you set up a promotion in the following way:

- The initial retail price for the promoted item is $8.00.
- If a customer buys items from the primary group, the new price for the promoted item is $7.75.

In this case, in the **Promo Results** section, you will see the following values:

- Retail: $7.75
- Price Change: $7.75 - ($8.00 * 1) = (0.25)

> To view the explanation about the promotion results, to the right of the necessary location name, click **Explanation**.

14. At the top of the promotion form, click **Save** to save the changes.

Mix and Match Promotion

The Mix and Match promotion gives customers a discount when they buy a specific number of items from the predefined list in a single purchase. The promoted items are generally of the same product or product family. For example, the Mix and Match promotion can be used for the following campaigns:

- Buy any three drinks and get a 20% discount.
- Buy 5 candies at $5.00.
- Save $1 off any two packs of cigarettes.

With the Mix and Match promotion type, the following types of discounts can be set:

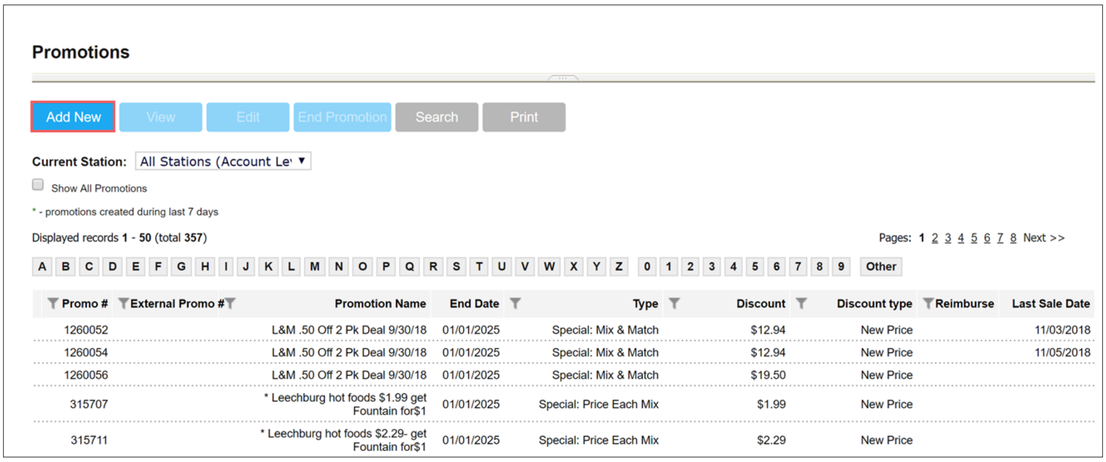
- New price: A new price for promoted items can be specified.
- Discount amount: A discount as the exact amount can be specified.
- Discount rate in percent: A discount as the percent rate can be specified.

> For information on what cash registers are compatible with Mix and Match promotions, see Compatible Cash Registers.

Setting Up Mix and Match Promotions

To set up a Mix and Match promotion:

1. Go to **Discount Management**.
2. At the top of the **Promotions** form, click **Add New**.



3. In the **Promotion Name** field, enter the name for the new promotion.
4. In the **Receipt CR Description** field, specify the promotion description that must be displayed on cash register receipts. The name length must not exceed ten characters including spaces. By default, the promotion name is displayed in this field.

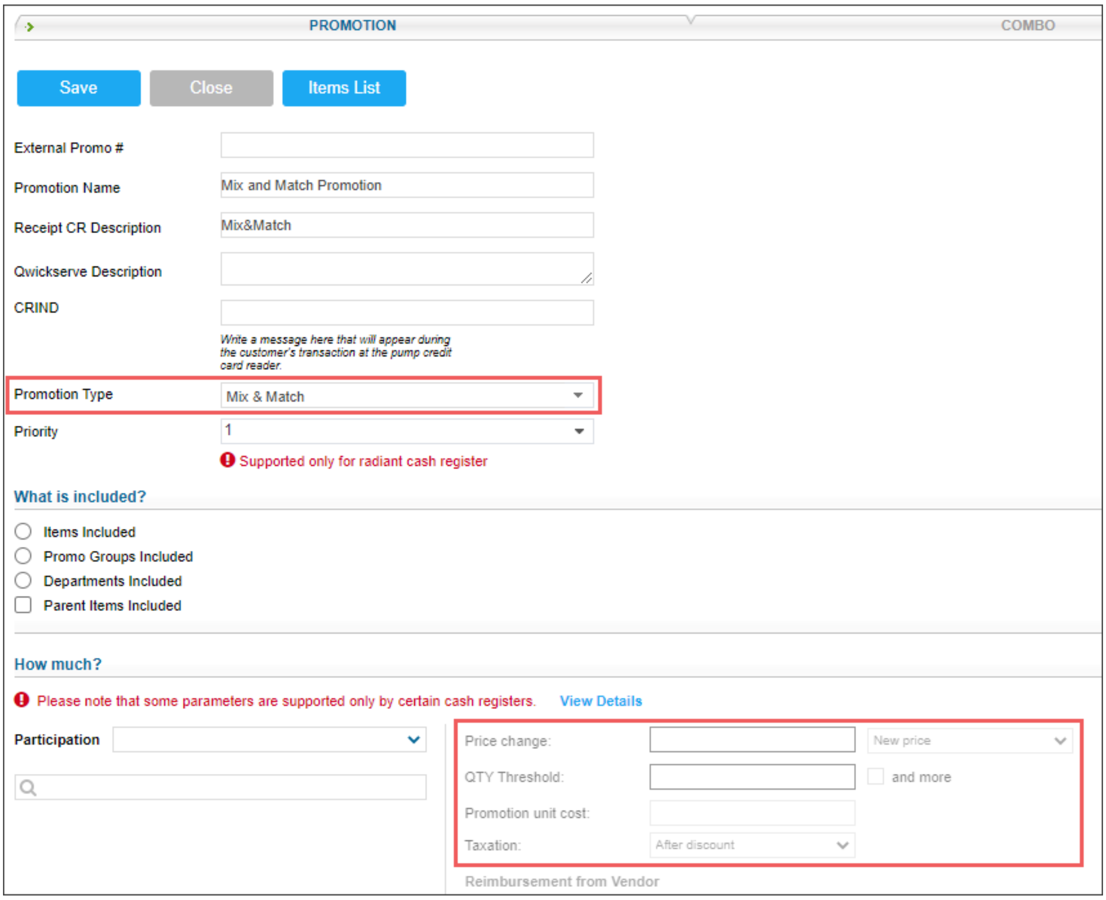
5. In the **Promotion Type** list, select **Mix and Match**.

   Result: The promotion default settings are uploaded in the **How much?** section according to the selected promotion type.

6. In the **Priority** list, in case you have several promotions for same group of items, specify the priority in which the promotion will be applied on the cash register in order to be in compliance with the vendor policy. Possible values:

   - **Empty**: Leave the **Priority** field blank, if you have only one promotion for one certain group of items.
   - **From 0 to 10**: Define the promotion's priority by setting up the lowest value to the highest priority level.

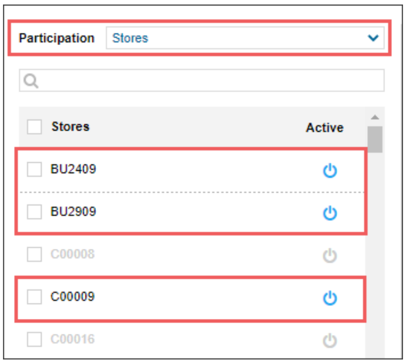
   > The **Priority** field is supported only by the Radiant cash registers and available. For more information about promotion limitations depending on the CR type, see Compatible Cash Registers.



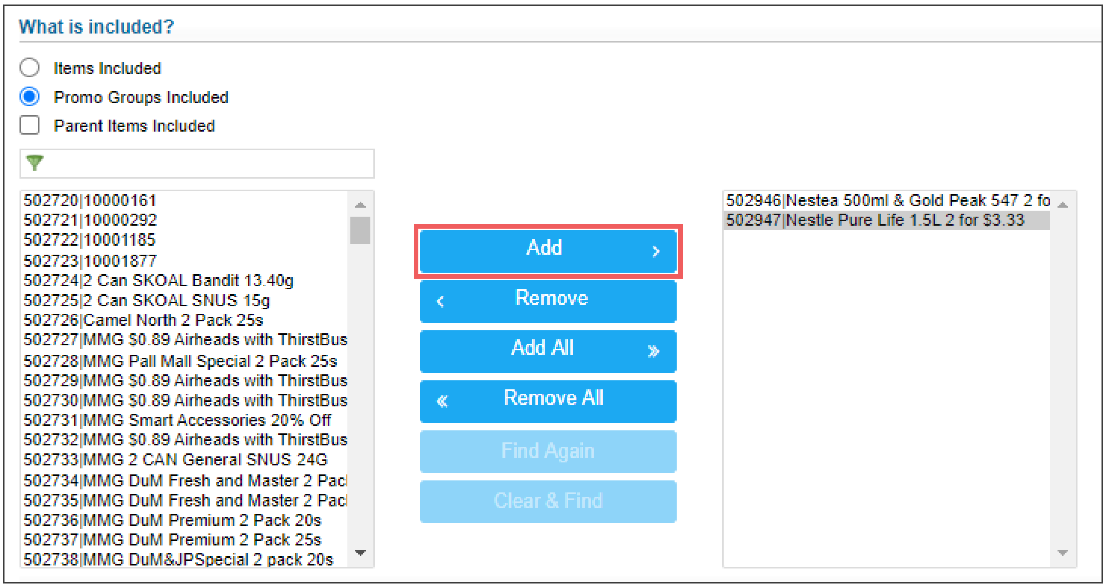
7. In the **How much** section:

   a. In the **Participation** list, select the type of objects for which the promotion must be activated: **Stores**, **Division**, **Company**, and so on.

b. In the list of objects below that is opened for the selected type of objects, click the power icon on the right of the object for which you want to activate the promotion.



8. In the **What is included?** section, select the desired additions to be included in the promotion. You can add items and promo groups. For more details, see Promotion Setup Form.



9. In the **How much?** section, configure the following promotion's basic parameters:

a. In the list on the right of the **Price Change** field, select the type of discount to be set for the promotion:

- **New Price**: Select this option if a new price for the promoted items is to be set.
- **Amount**: Select this option if a discount as the exact amount is to be specified.
- **Percent**: Select this option if a discount as the percent rate is to be specified.

b. In the **Price Change** field, specify the new price for the promoted items or the discount value, depending on the discount type you have selected. If the **New price** value has been selected, the sum amount for all items for which the promotion is created must be specified. This field is mandatory for the Mix and Match promotion.

c. In the **Qty Threshold** field, specify the number of items that a customer must purchase for the discount to be applied and enable the and more option if necessary. For example, if the discount is to be applied when a customer purchases two or more items, in the **Qty Threshold** field, specify 2 and enable the **and more** option. This field is mandatory for the Mix and Match promotion.

d. In the **Promotion Unit Cost** field, specify the item cost for the promotion.

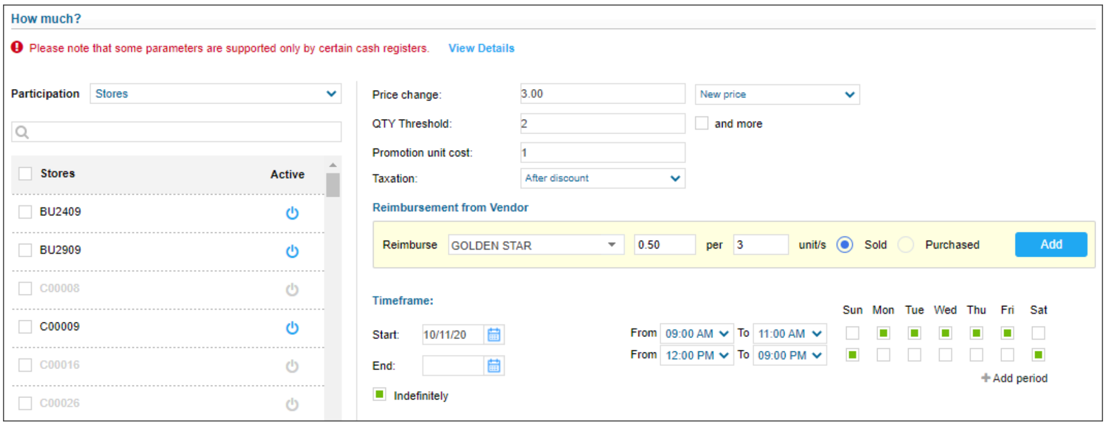
e. In the **Taxation** list, select when the taxes must be calculated for items added to the promotion: **After discount** or **Before discount**.

> Mind the following:
> - To use the **Before discount** option, make sure the **Allow Tax Before Mix and Match Discount** option is enabled in the CR settings for the location. For details, see Station Options: Cash Register > **Advanced**.
> - (For Sapphire cash registers) If you select the **Before discount** option, make sure the items added to the promotion belong to the same CR department and have the same current retail price. In the opposite case, when you save the promotion settings, CStoreOffice® will report an error, and the promotion will not be saved.

10. Configure the following promotion's settings:

   - **Reimbursement from Vendor**
   - **Timeframe**

> The **Reimbursement from Vendor** and **Timeframe** settings are configured equally for all promotion types. For more information on how to configure them, see Promotion Setup Form.



11. Scroll down to the **Promo Results** table and make sure the promotion is set up correctly. The promo results are calculated by the following formulas:

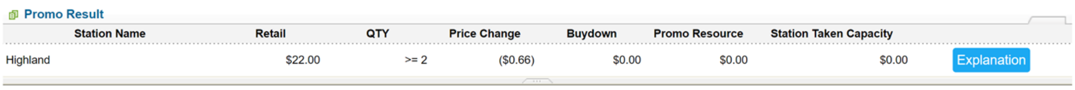
- Retail:
  - New Price: *Retail = Promo Price*
  - Amount: *Retail = Current Retail * QTY - Amount Discount*
  - Percent discount: *Retail = Current Retail - ((Current Retail / 100) * Discount Percent) * QTY*
- Price Change:
  - New Price: *Price Change = Promo Price - (Current Retail * QTY) + Buydowns*
  - Amount: *Price Change = - Amount Discount + Buydowns*
  - Percent discount: Price Change = *-((Percent Discount * Current Retail/100) * QTY) + Buydowns*

For example, you set up a promotion in the following way:

- The initial retail price for the promoted item is $11.33.
- If a customer buys 2 items, the new price for 2 items is $22.00.
- No reimbursement amount is set up.

In this case, in the **Promo Results** section, you will see the following values:

- Retail: $22.00
- Price Change: *$22.00 - ($11.33*2) = (0.66)*


Promo Result

Station Name	Retail	QTY	Price Change	Buydown	Promo Resource	Station Taken Capacity	
Highland	$22.00	>= 2	($0.66)	$0.00	$0.00	$0.00	Explanation

To view the explanation about the promotion results, to the right of the necessary location name, click **Explanation**.

12. At the top of the promotion form, click **Save** to save the changes.

New Price Promotion

New Price promotions will allow a temporary reduction in the price of some items for a certain period of time. This type of promotion can be used to drive the product interest and entice new customers.

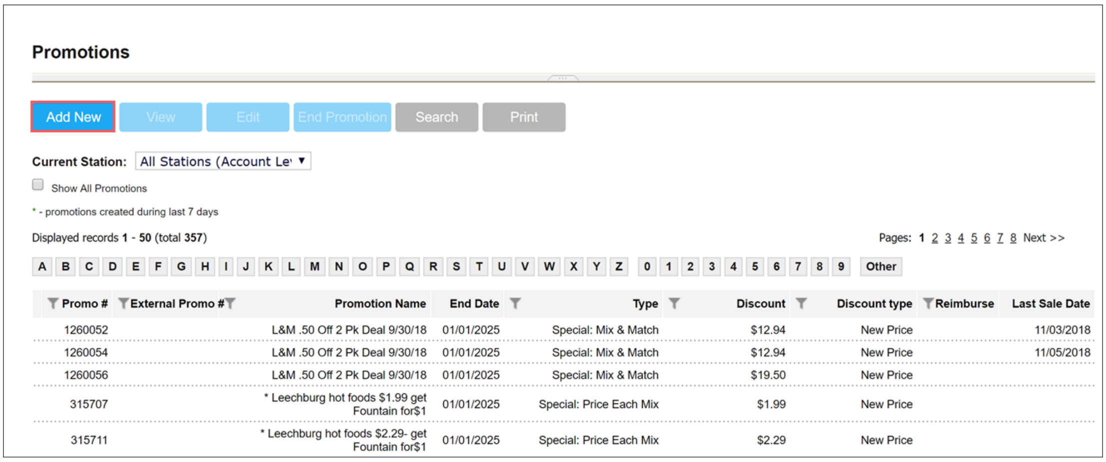
With the Price Reduction Promotion type, only one discount type can be set up — the new price for promoted items. For example, if a regular item price is $5.95, a new price for the item can be set at $.5.25.

> For information on what cash registers are compatible with New Price promotions, see Compatible Cash Registers.

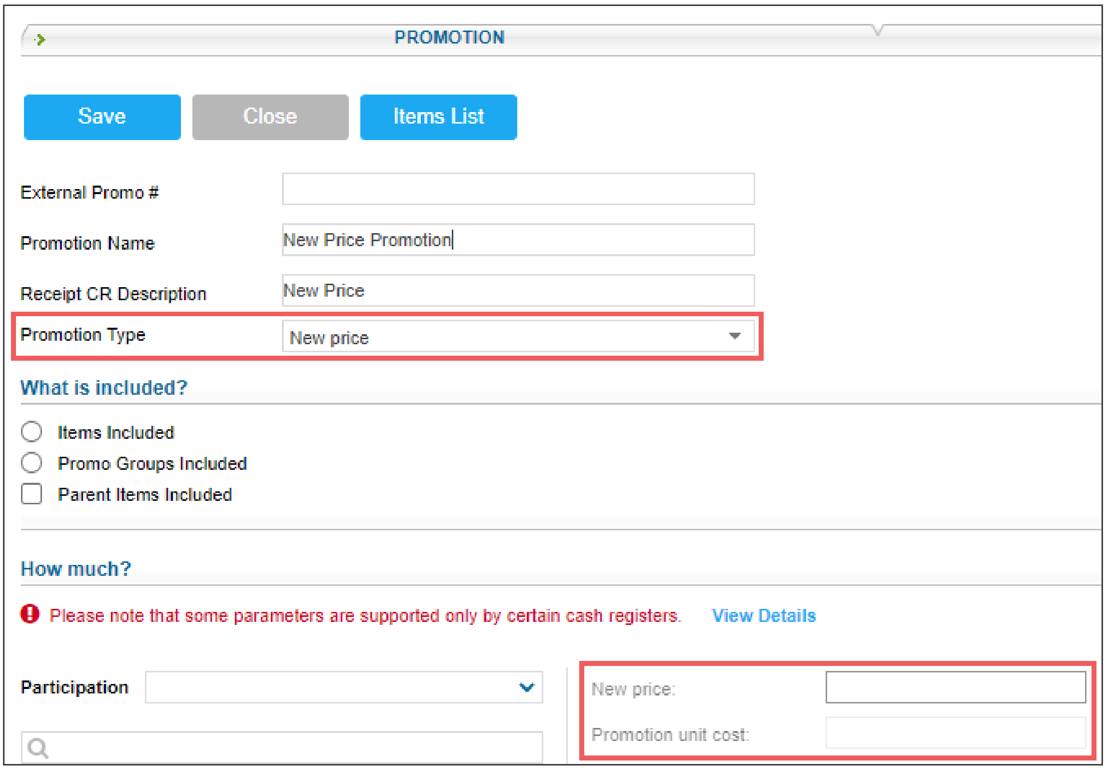
Setting Up New Price Promotions

To set up a New Price promotion:

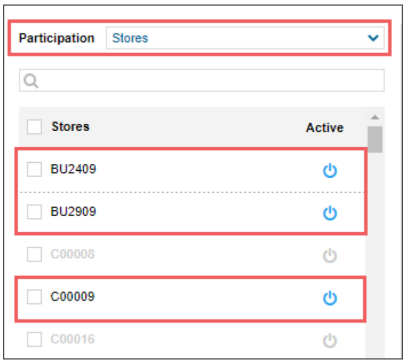
1. Go to **Discount Management**.
2. At the top of the **Promotions** form, click **Add New**.



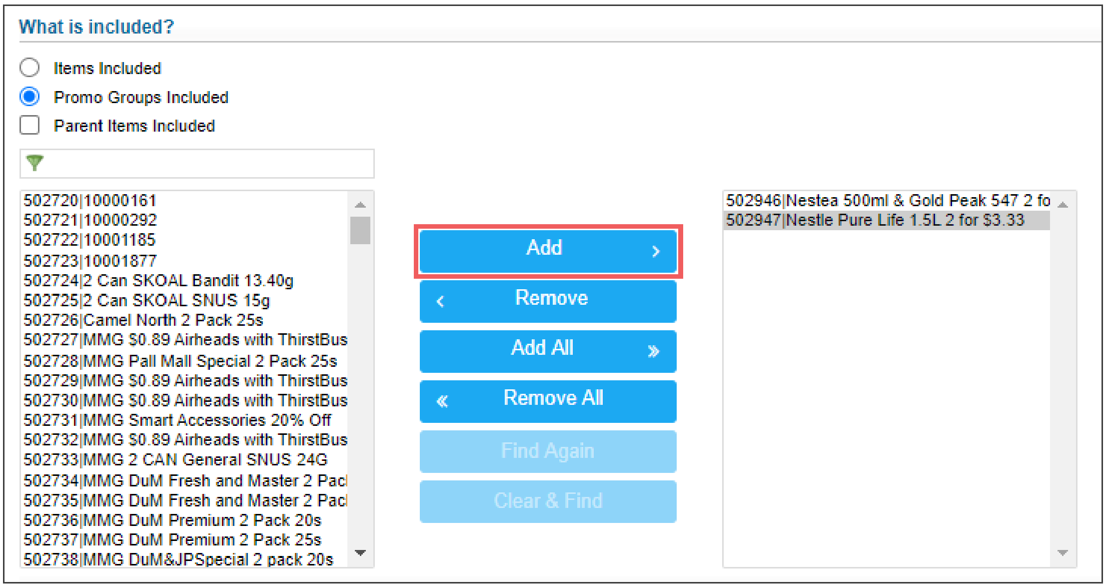
3. In the **Promotion Name** field, enter the name for the new promotion.
4. In the **Receipt CR Description** field, specify the promotion description that must be displayed on cash register receipts. The name length must not exceed ten characters including spaces. By default, the promotion name is displayed in this field.
5. In the **Promotion Type** list, select **New Price**.
   Result: The promotion default settings are uploaded in the **How much?** section according to the selected promotion type.



6. In the **How much** section:
   a. In the **Participation** list, select the type of objects for which the promotion must be activated: **Stores**, **Division**, **Company**, and so on.
   b. In the list of objects below that is opened for the selected type of objects, click the power icon on the right of the object for which you want to activate the promotion.



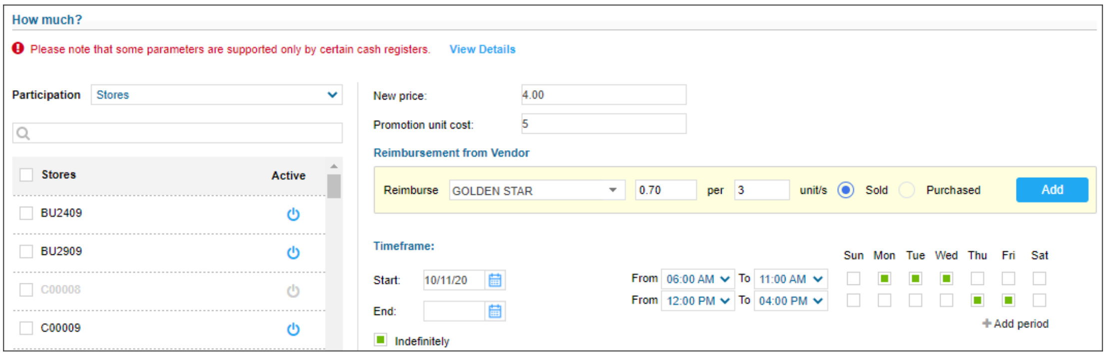
7. In the **What is included?** section, select the desired additions to be included in the promotion. Items and promo groups can be added. For more details, see Promotion Setup Form.



8. In the **How much?** section, configure the following promotion's basic parameters:
   a. In the **New price** field, specify the new price for the promoted item. This field is mandatory for the New Price promotion..
   b. In the **Promotion unit cost** field, specify the item cost for the promotion.

9. Configure the following promotion's settings:
   - **Reimbursement from Vendor**
   - **Timeframe**

> The **Reimbursement from Vendor** and **Timeframe** settings are configured equally for all promotion types. For more information on how to configure them, see Promotion Setup Form.



10. Scroll down to the **Promo Results** table and make sure the promotion is set up correctly. The promo results are calculated by the following formulas:
    - *Retail = Promo Price*
    - *Price Change = Promo Price - Current Retail + Buydowns*

For example, you set up a promotion in the following way:

- The initial retail price for the promoted item is $1.19.
- The promotion price is $1.00.
- The reimbursement amount is $0.19.

In this case, in the **Promo Results** section, you will see the following values:

- Retail: $1.00
- Price Change: $1.00 - $1.19 + $0.19 = $0.00

Promo Result

Station Name	Retail	QTY	Price Change	Buydown	
Cochran	$1.00	1	$0.00	$0.19	Explanation

To view the explanation about the promotion results, to the right of the necessary location name, click **Explanation**.

11. At the top of the promotion form, click **Save** to save the changes.

Price Each Mix Promotion

The Price Each Mix promotion gives customers a discount when they buy at least one item from one or more item groups. The promoted items are generally related to each other. For example, the Price Each Mix promotion can be used for the following campaigns:

- Buy a pizza roll and coke and get $1.00 off the price.
- Buy a hamburger and fountain drink at $7.95.

To set up a Price Each Mix promotion, you need to create several groups of items that will take part in the promotion, for example, a *Pizza Rolls* group and a *Coke* group. For each created group, you need to set up a separate discount. The Price Each Mix promotion supports the following types of discounts:

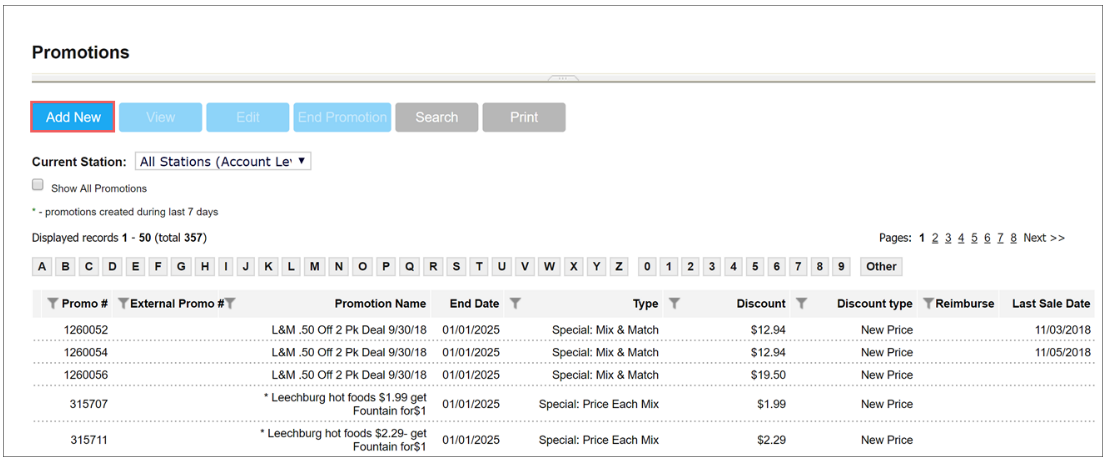
- New price: A new, specified price for promoted items.
- Discount amount: A specified discount as the exact amount.
- Discount rate in percent: A specified discount as the percent rate.

> For information on what cash registers are compatible with Price Each Mix promotions, see Compatible Cash Registers.

Setting Up Price Each Mix Promotions

To set up a Price Each Mix promotion:

1. Go to **Discount Management**.
2. At the top of the **Promotions** form, click **Add New**.



3. In the **Promotion Name** field, enter the name for the new promotion.
4. In the **Receipt CR Description** field, specify the promotion description that must be displayed on cash register receipts. The name length must not exceed ten characters including spaces. By default, the promotion name is displayed in this field.

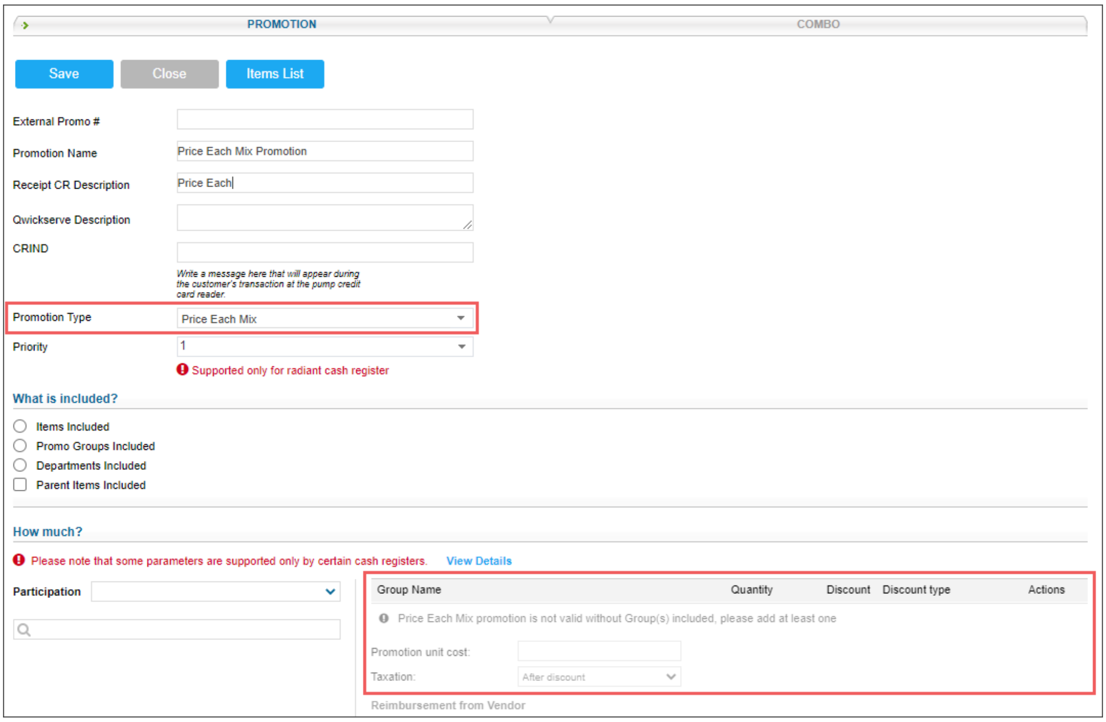
5. In the **Promotion Type** list, select **Price Each Mix**.

   Result: The promotion default settings are uploaded in the **How much?** section according to the selected promotion type.

6. In the **Priority** list, in case you have several promotions for same group of items, specify the priority in which the promotion will be applied on the cash register in order to be in compliance with the vendor policy. Possible values:

   - **Empty**: Leave the **Priority** field blank, if you have only one promotion for one certain group of items.
   - **From 0 to 10**: Define the promotion's priority by setting up the lowest value to the highest priority level.

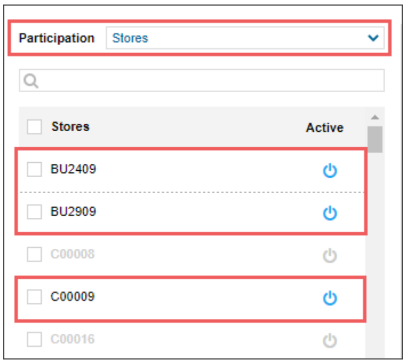
   The **Priority** field is only supported by Radiant cash registers. For more information on promotion compatibility, see Compatible Cash Registers.



7. In the **How much** section:

   a. In the **Participation** list, select the type of objects for which the promotion must be activated: **Stores**, **Division**, **Company**, and so on.

   b. In the list of objects below that is opened for the selected type of objects, click the power icon on the right of the object for which you want to activate the promotion.



8. Configure promotion's promo groups. In the **What is included?** section, click **Promo Groups Included**.

   Result: The list of promo groups available for this promotion is displayed in the left column.

9. For each promo group to be added to the promotion:

   a. In the left column, select the promo group and click the **Add** button.

      Result: Selected promo group is added to the right column.

   b. In the right column, select the promo group and click the **Add List** button.

      Result: The promo group is added to the **How much?** section > promo groups.

   c. In the **How much?** section > promo groups, double-click added promo group and specify the following settings:

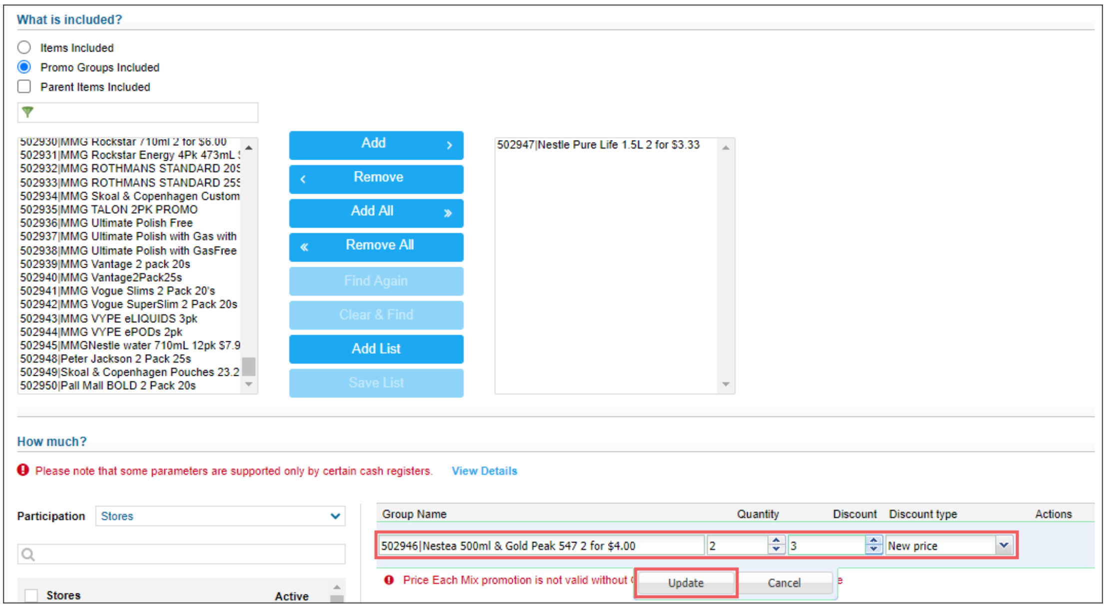
      - In the **Quantity** field, specify the number of items that a customer must purchase for the promotion to take effect.
      - In the **Discount type** field, select the type of discount that you want to set for the promotion:

        - **New price**: Select this option if a new price for items in the group is to be set.
        - **Amount**: Select this option if a discount as the exact amount is to be specified.
        - **Percent**: Select this option if a discount as the percent rate is to be specified.

> Bulloch cash registers support only the **New price** value in the **Discount type** field.

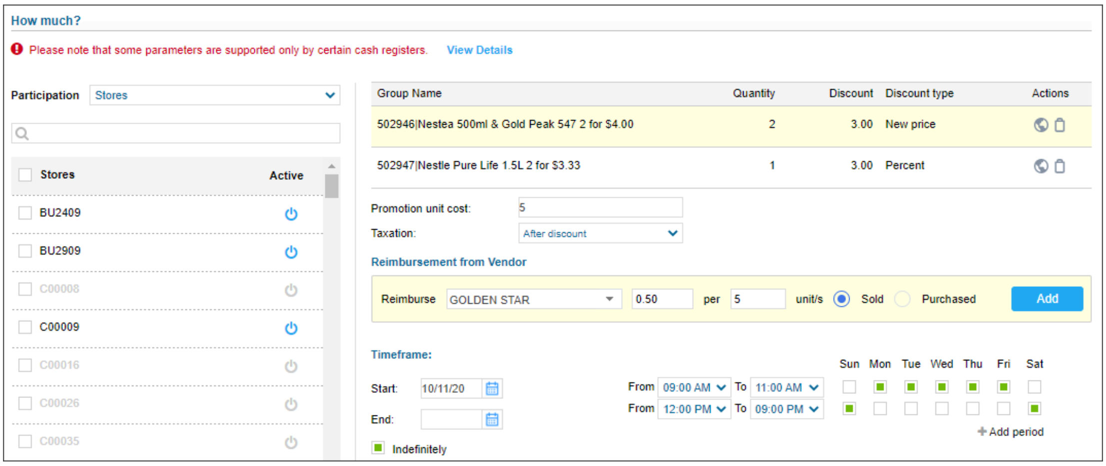
      - In the **Discount** field, specify the new price or the discount value, depending on the discount type that has been selected. This field is mandatory for the Price Each Mix promotion

d. Click the **Update** button.



10. In the **Promotion unit cost** field, specify the item cost for the promotion.
11. In the **Taxation** list, select when the taxes must be calculated for items added to the promotion: **After discount** or **Before discount**.
12. Configure the following promotion's settings:
    - **Reimbursement from Vendor**
    - **Timeframe**

> The **Reimbursement from Vendor** and **Timeframe** settings are configured equally for all promotion types. For more information on how to configure them, see Promotion Setup Form.



13. Scroll down to the **Promo Results** table and make sure the promotion is set up correctly. The results are calculated for each group separately and then summed up. The promo results are

calculated by the following formulas:

- Retail:
  - New Price: *Retail = Promo Price*
  - Amount: *Retail = (Current Retail * QTY - Amount Discount)*
  - Percent discount: *Retail = Current Retail - ((Current Retail / 100) * Discount Percent) *QTY*
- Price Change:
  - New Price: *Price Change = Promo Price - (Current Retail * QTY) + Buydowns*
  - Amount: *Price Change = -(Amount Discount*QTY) + Buydowns*
  - Percent discount: Price Change = *-((Percent Discount*Current Retail/100) * QTY) + Buydowns*

For example, you set up a promotion in the following way:

- The initial retail price for the promoted item is $1.49.
- If a customer buys 2 items, the customer gets a discount of 10%.
- No reimbursement amount is set up.

In this case, in the **Promo Results** section, you will see the following values:

- Retail: $2.68 (for 2 items)
- Price change: -((10*1.49/100) * 2) = (0.30)

Promo Result

Station Name	Retail	QTY	Price Change	Buydown	Promo Resource	Station Taken Capacity	
Highland	$2.68	2	($0.30)	$0.00	$0.00	$0.00	Explanation

To view the explanation about the promotion results, to the right of the necessary location name, click **Explanation**.

14. At the top of the promotion form, click **Save** to save the changes.

Price Modifier Promotion

The Price Modifier promotion gives customers a discount when they buy a specific number of items of the same type in a single purchase. For example, the Price Modifier promotion can be used for the following campaigns:

- Buy two cups of coffee at $3.25.
- Buy two donuts at $6.00.

For information on what cash registers are compatible with Price Modifier promotions, see Compatible Cash Registers.

Before You Begin

Before starting to set up the Price Modifier promotion, make sure the following conditions are met:

- **Allow Pricemodifier is ON**: The Allow Pricemodifier option is selected in the cash register settings.

  For details, see Station Options: Cash Register > select your cash register type.

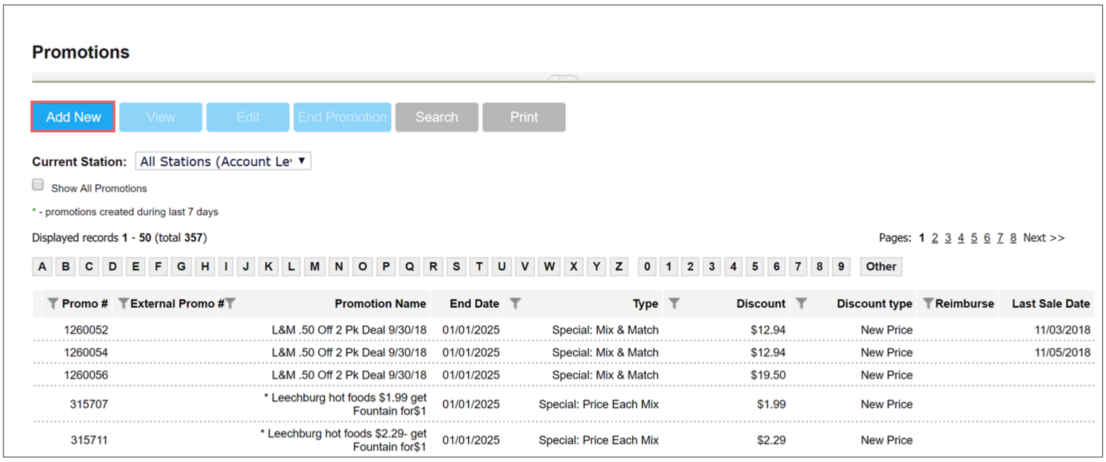
- **Price > $0**: The promotion's price is more than zero.
- **Items QTY > 1**: The promotion's items quantity is more than one.

In case any of the above conditions is not met, the Price Modifier promotion is not sent to the cash register.

Setting Up Price Modifier Promotions

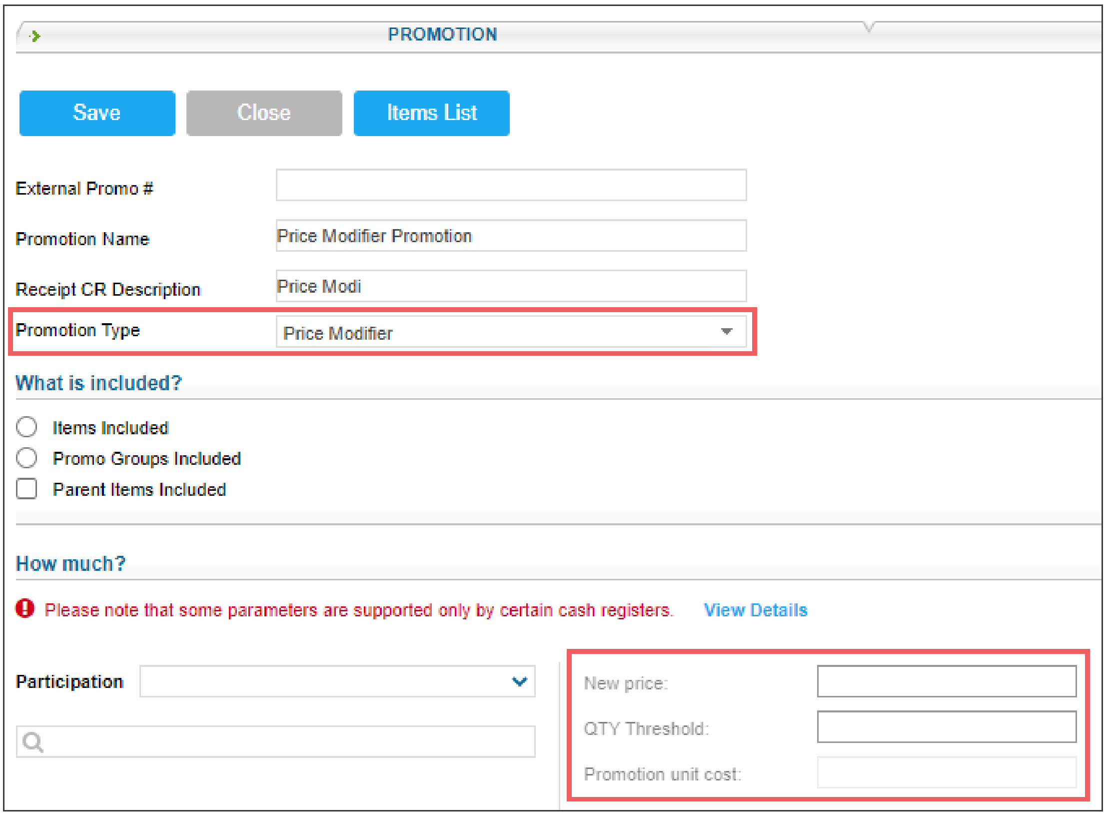
To set up a Price Modifier promotion:

1. Go to **Discount Management**.
2. At the top of the **Promotions** form, click **Add New**.

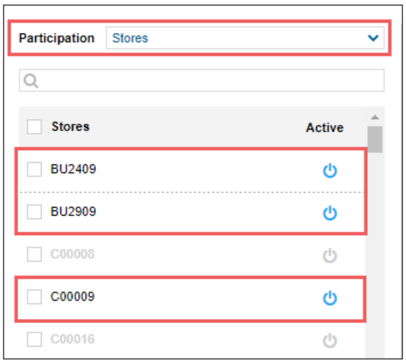


3. In the **Promotion Name** field, enter the name for the new promotion.
4. In the **Receipt CR Description** field, specify the promotion description that must be displayed on cash register receipts. The name length must not exceed ten characters including spaces. By default, the promotion name is displayed in this field.
5. In the **Promotion Type** list, select **Price Modifier**.

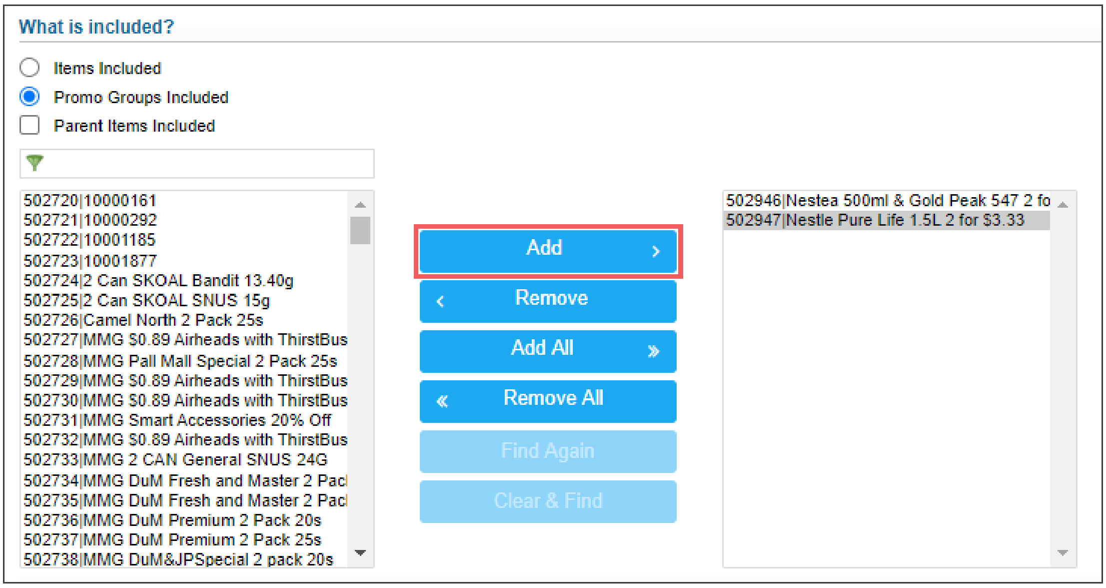
   Result: The promotion default settings are uploaded in the **How much?** section according to the selected promotion type.



6. In the **How much** section:
   a. In the **Participation** list, select the type of objects for which the promotion must be activated: **Stores**, **Division**, **Company**, and so on.
   b. In the list of objects below that is opened for the selected type of objects, click the power icon on the right of the object for which you want to activate the promotion.

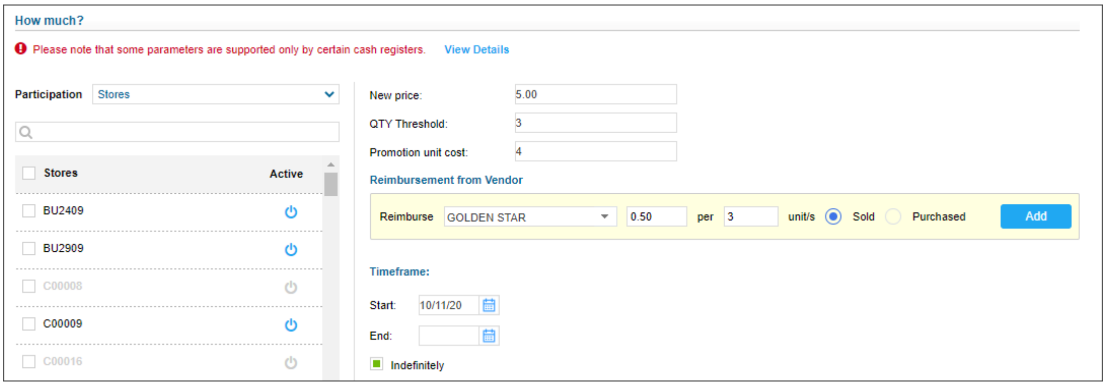


7. In the **What is included?** section, select the desired additions to be included in the promotion. You can add items and promo groups. For more details, see Promotion Setup Form.



8. In the **How much?** section, configure the following promotion's basic parameters:
   a. In the **New Price** field, specify the new price for the promoted items. In this field, you must specify the sum amount for all items for which the promotion is created. This field is mandatory for the Price Modifier promotion.
   b. In the **Qty Threshold** field, specify the number of items that a customer must purchase for the discount to be applied. This field is mandatory for the Price Modifier promotion.
   c. In the **Promotion Unit Cost** field, specify the item cost for the promotion.
9. Configure the following promotion's settings:
   - **Reimbursement from Vendor**
   - **Timeframe**: Only days can be configured for this promotion type without hours.

> The **Reimbursement from Vendor** and **Timeframe** settings are configured equally for all promotion types. For more information on how to configure them, see Promotion Setup Form.



10. Scroll down to the **Promo Results** table and make sure the promotion is set up correctly. The promo results are calculated by the following formulas:

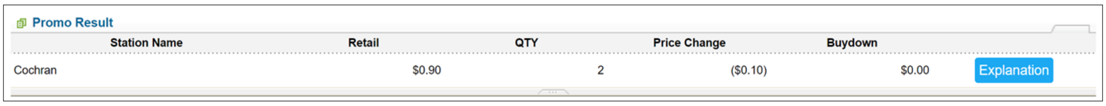
    - *Retail = Promo Price*
    - *Price Change = Promo Price - (Current Retail * QTY)+ Buydowns*

    For example, you set up a promotion in the following way:

    - The initial retail price for the promoted item is $0.50.
    - The quantity threshold is 2.
    - The new price for 2 items is $0.90.
    - No reimbursement amount is set up.

    In this case, in the **Promo Results** section, you will see the following values:

    - Retail: $0.90
    - Price Change: $0.90 - ($0.50 * 2) = ($0.10)



Promo Result

Station Name	Retail	QTY	Price Change	Buydown	
Cochran	$0.90	2	($0.10)	$0.00	Explanation

To view the explanation about the promotion results, to the right of the necessary location name, click **Explanation**.

11. At the top of the promotion form, click **Save** to save the changes.

Price Reduction Promotion

Price Reduction promotions give customers a discount on specific items at a certain period of time. This type of promotion is used to drive the product interest or clear the product stock.

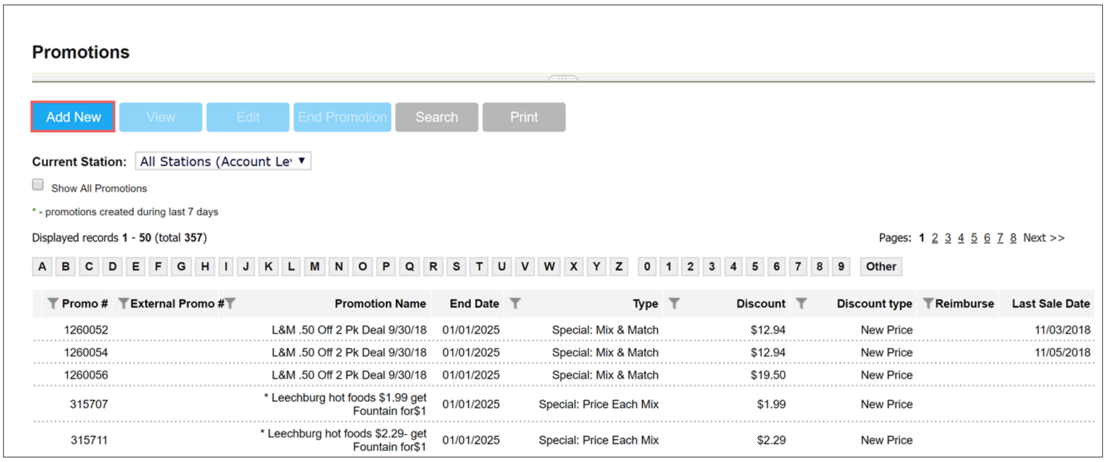
With the Price Reduction promotion type, only one discount type can be set up — the discount amount off a regular item price. For example, if the regular item price is $5.95, a $0.70 discount can be set up, and the resulting promotion price will be $5.25.

> For information on what cash registers are compatible with Price Reduction promotions, see Compatible Cash Registers.

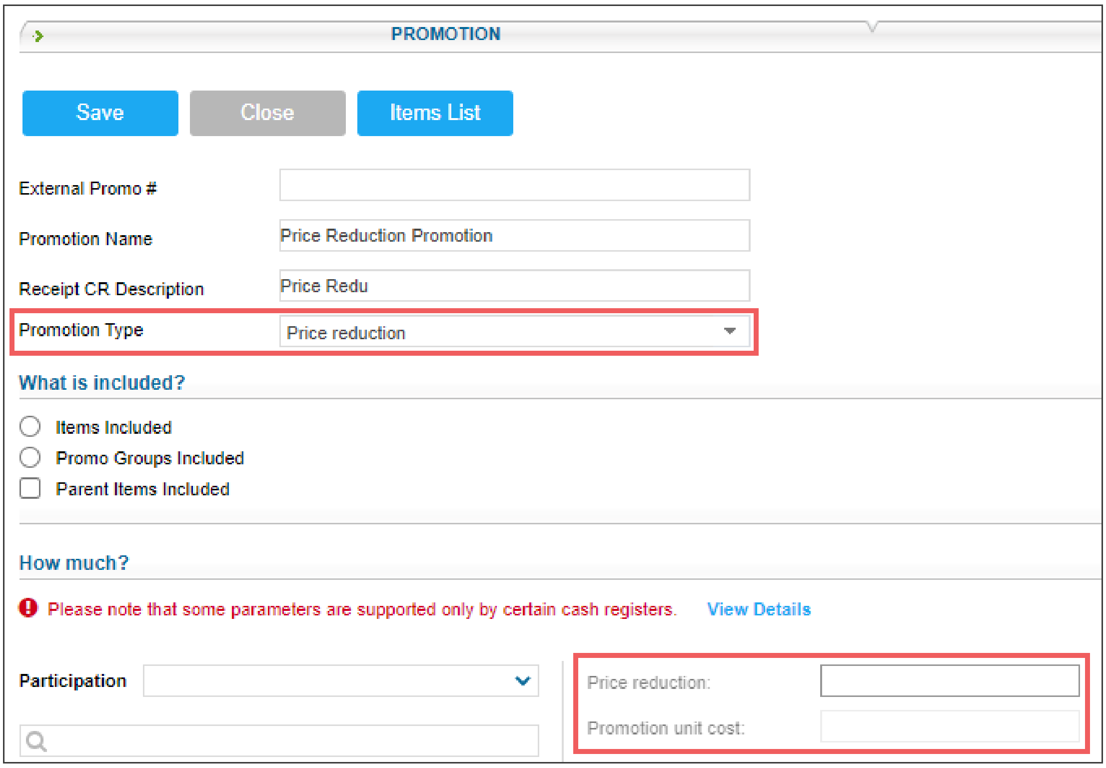
Setting Up Price Reduction Promotions

To set up a Price Reduction promotion:

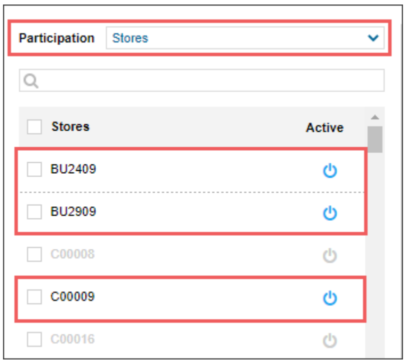
1. Go to **Discount Management**.
2. At the top of the **Promotions** form, click **Add New**.



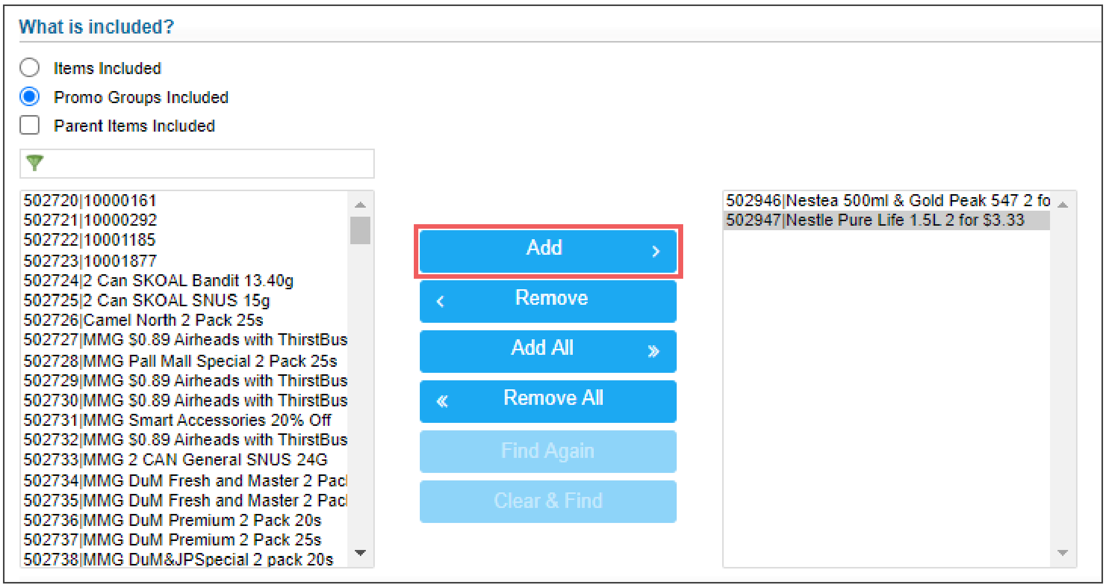
3. In the **Promotion Name** field, enter the name for the new promotion.
4. In the **Receipt CR Description** field, specify the promotion description that must be displayed on cash register receipts. The name length must not exceed ten characters including spaces. By default, the promotion name is displayed in this field.
5. In the **Promotion Type** list, select **Price Reduction**.
   Result: The promotion default settings are uploaded in the **How much?** section according to the selected promotion type.



6. In the **How much** section:
   a. In the **Participation** list, select the type of objects for which the promotion must be activated: **Stores**, **Division**, **Company**, and so on.
   b. In the list of objects below that is opened for the selected type of objects, click the power icon on the right of the object for which you want to activate the promotion.



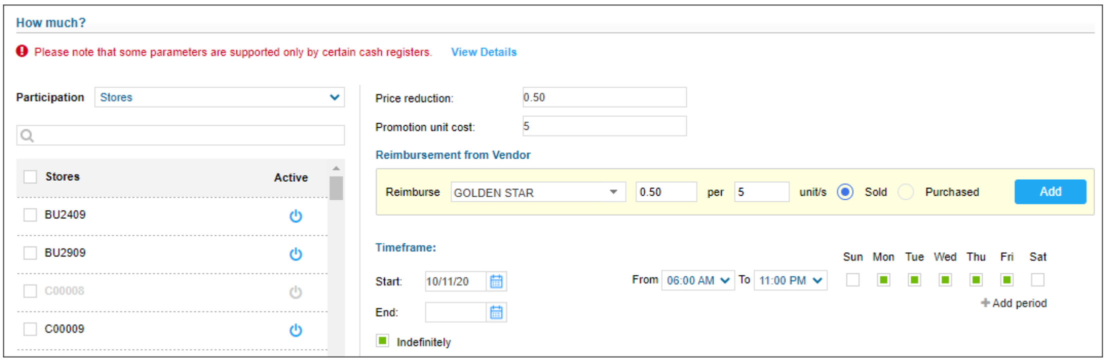
7. In the **What is included?** section, select the desired additions to be included in the promotion. Items and promo groups can be added. For more details, see Promotion Setup Form.



8. In the **How much?** section, configure the following promotion's basic parameters:
   a. In the **Price reduction** field, specify the discount amount off the regular price. This field is mandatory for the Price Reduction promotion.
   b. In the **Promotion unit cost** field, specify the item cost for the promotion.

9. Configure the following promotion's settings:
   - **Reimbursement from Vendor**
   - **Timeframe**

> The **Reimbursement from Vendor** and **Timeframe** settings are configured equally for all promotion types. For more information on how to configure them, see Promotion Setup Form.



10. Scroll down to the **Promo Results** table and make sure the promotion is set up correctly. The promo results are calculated by the following formulas:
    - *Retail = Current Retail - Discount Amount*
    - *Price Change = -Discount Amount + Buydowns*

For example, you set up a promotion in the following way:

- The initial retail price for the promoted item is $1.19.
- The discount amount is $0.10.
- The reimbursement amount is $0.05.

In this case, in the **Promo Results** section, you will see the following values:

- Retail: $1.19 - $0.10 = $1.09
- Price Change: -$0.10 + $0.05 = ($0.05)

Promo Result

Station Name	Retail	QTY	Price Change	Buydown	
Cochran	$1.09	1	($0.05)	$0.05	Explanation

To view the explanation about the promotion results, to the right of the necessary location name, click **Explanation**.

11. At the top of the promotion form, click **Save** to save the changes.

Working with Promotions

The following actions can be performed with promotions:

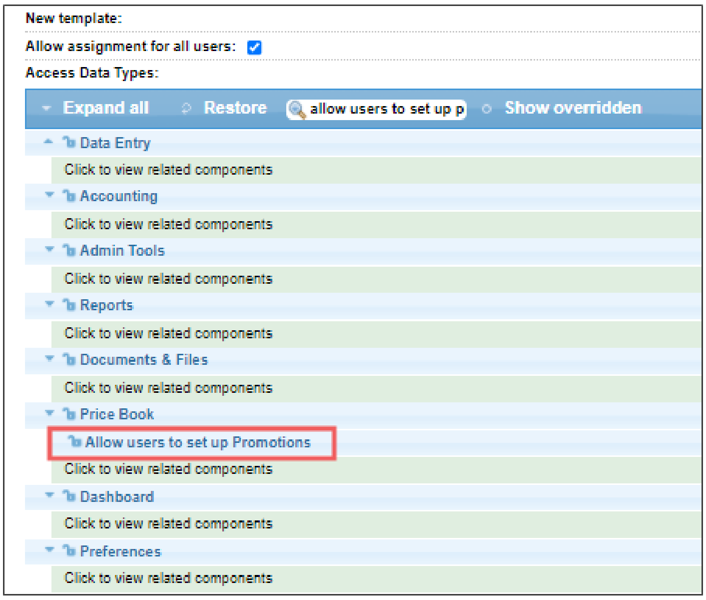
- Add a new promotion
- Edit a promotion
- Delete a promotion
- End a promotion
- Continue a promotion
- Work with the promotions list
- View promotion reports

Adding New Promotion

Before adding a new promotion, make sure the following conditions are met:

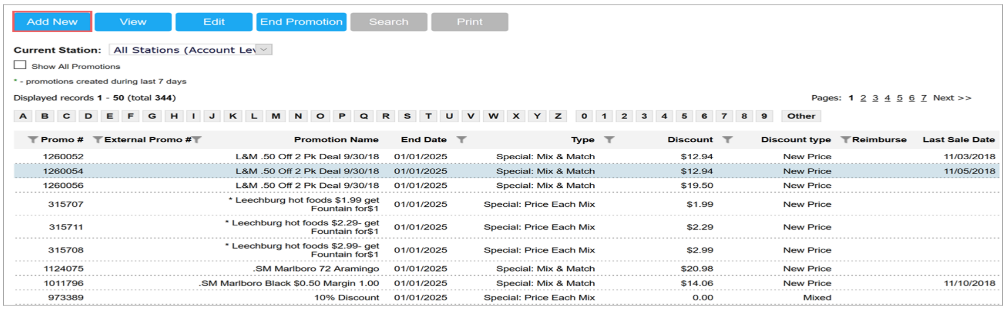
- The items you are going to add to a promotion are active. A promotion cannot be applied to inactive items. For more information on how to check if the item is active or not, see Viewing Inactive Items.
- The **Allow users to set up Promotions** permission is granted to your user. For more information

on how to grant a permission to the user, see Roles Management Permissions.



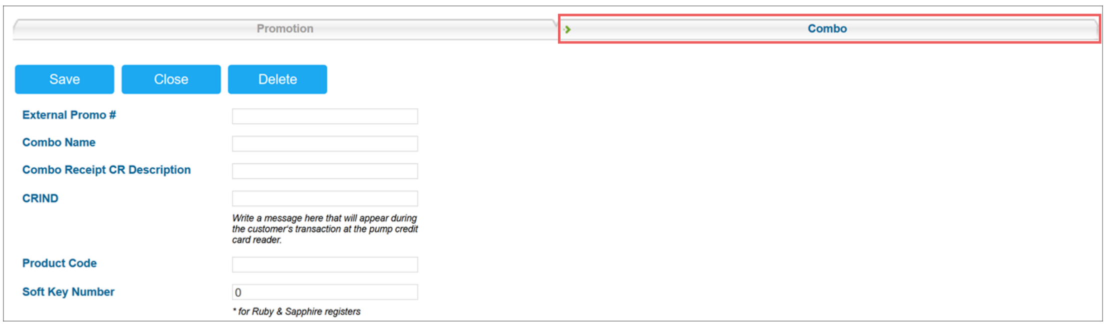
To add a new promotion:

1. On the main tool bar, click **Discount Management**.
2. At the top of the promotions list, click **Add New**.



Result: A new window with the promotion setup form opens.

3. If a combo is going to be created, click **Combo**.



4. Depending on the type of promotion being created, enter all the conditions for the promotion as described in one of the following sections:

- Promotion Setup Form
- Combo Setup Form

5. Click **Save** at the top of the page.

   Result: The promotion or combo has been added to the system.

> All new (created within the last seven days) promotions or combos are marked with a green asterisk in the promotions list.

Promotion Setup Form

The Promotion Setup form includes the following sections for configuring promotion settings:

- Promotion Header
- What is Included?
- How Much?
- Promo Results
- Promo Errors

Promotion Header

The information at the top of the page identifies the promotion in PIM and in the cash registers. The Promotion Header consists of the following settings:

- **External Promo #**: External promotion identifier. This field is populated automatically by the system and displayed under the following conditions:
  - Only for Radiant cash registers;
  - If the **Send External Promo # to CR** option is selected at the **Cash Register** form at **Data Entry** > **Dashboard** > **Station Options** > **Cash Register** > **Advanced** > **Advanced**;
  - If the **Allow user to edit Permission for External promo ID** permission is activated for the current user.

  > In case one promotion is created for several locations, it will be saved with the same External Promo # value for each location.

- **Promotion Name**: This is the name of the promotion in CStoreOffice®.
- **Receipt CR Description**: This is the name of the promotion in the cash register. It cannot exceed ten characters including spaces.
- **[[[Undefined variable MyVariables.Qwickserve]]] Description**: This field is available only for the customers who have the SmartPOS cash register or use the [[[Undefined variable

MyVariables.Qwickserve]]] solution. In this field, enter the promotion's name to be displayed on the [[[Undefined variable MyVariables.Qwickserve]]] device.

- **CRIND**: This stands for Card Readers in Dispenser (initially a Gilbarco term, now used generically). A message that will appear during the customer's transaction at the pump credit card reader can be entered.

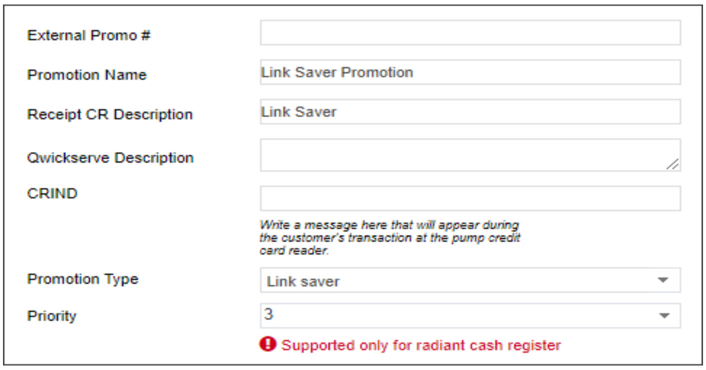
> This parameter is currently supported only by the Gilbarco cash register.

- **Promotion Type**: Select the promotion type based on which the promotion parameters of the corresponding promotion type will become available for setup in the **How much?** section.

> For more information about available promotion types, see Promotion Types.

- **Priority**: In case you have several promotions for same group of items, specify the priority in which the promotion will be applied on the cash register in order to be in compliance with the vendor policy. Possible values:
  - **Empty**: Leave the Priority field blank, if you have only one promotion for one certain group of items.
  - **From 0 to 10**: Define the promotion's priority by setting up the lowest value to the highest priority level.

> The **Priority** field is supported only by the Radiant cash registers and available only for the Mix & Match, Price Each Mix, and Link Saver promotion types. For more information about promotion limitations depending on the CR type, see Compatible Cash Registers.

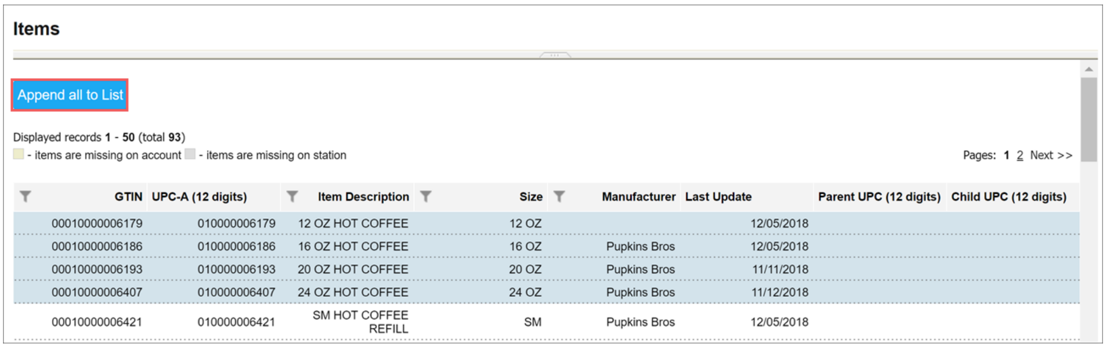


What is Included?

In this section, define which items will be included in the promotion:

- **Items Included**. If this option is selected, the Items page is opened in a new window. Follow these steps:

a. Use the Find and Replace tool to find the necessary items.
b. Select the items to be included in the promotions.
c. Click the **Append all to List** button above the items list.



On the page for setting up the promotion, boxes with items appear below in the same section.

d. Add the items to be included in the promotion to the right box. You can also remove the items from the right box if you want them excluded from the promotion, or click **Find Again** and repeat steps from *a* through *d* to add more items.

- **Promo Groups Included**. If you select this option, the boxes with promo groups appear.

ADDING PROMO GROUP TO PROMOTION

1. In the left column, select the promo group you want to add.
2. Click the **Add** button.
3. In the right column, select the added promo group.
4. Click the **Add List** button.

*Result:*The promo group is added to the **Groups** table in the **How much?** section.>

- **Departments Included**. This option is currently not supported by the cash registers. For more information on the CStoreOffice® promotions limitations on different cash registers, see Compatible Cash Registers.

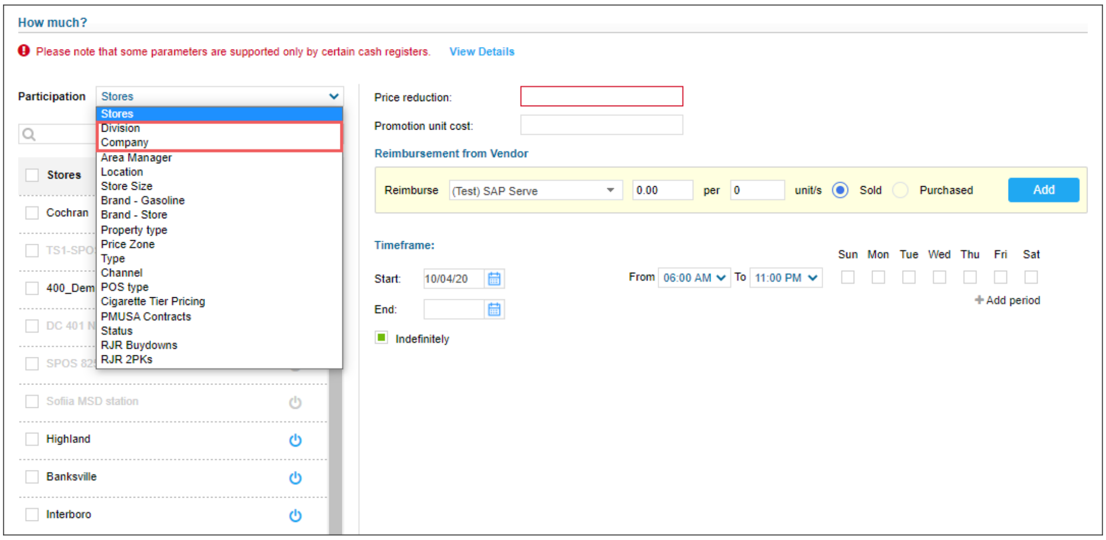
- **Parent Items Included**. Select this option, if you want to include the parent items in the promotion.

How Much?

In the **How Much?** section, define the following conditions for the promotion:

1. **Promotion location**. Do the following:
    - In the **Participating** list, select the type of the promotion's location or tag.

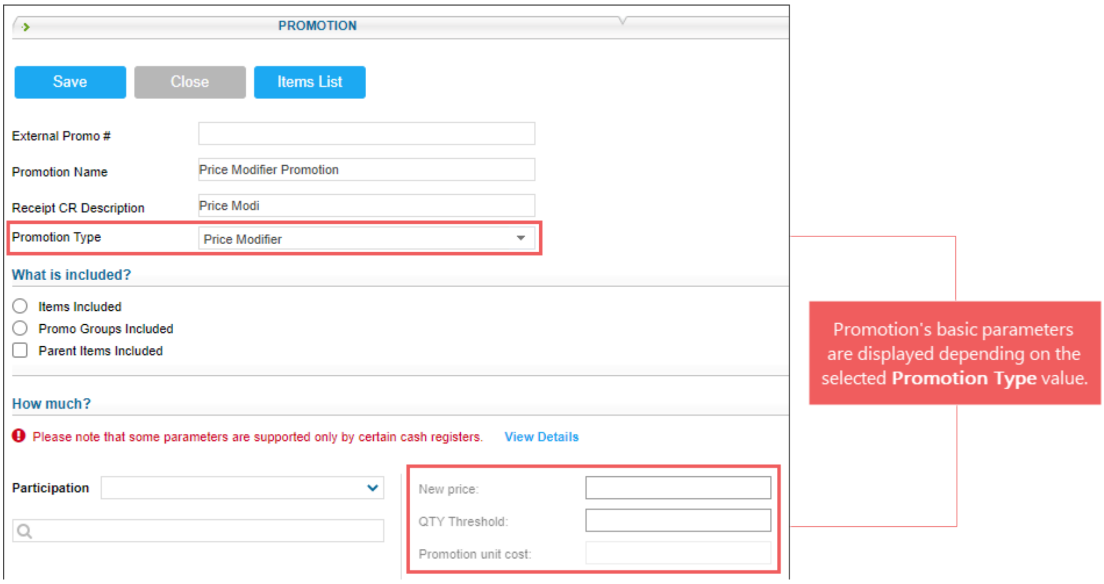
    > Make sure neither **Division**, nor **Company** is selected as the promotion's location because these two types are not supported in PIM.



    - Below the **Participation** list, activate one or several locations participating in a promotion.

2. Configure the following promotion's basic parameters:
    - **Promotion unit cost**: A new item's cost agreed with the vendor. It is recommended to populate this field, if you are creating a promotion for one item only, such as New Price or Price Reduction promotion. If an item has a new cost defined within a promotion, it entails the following changes for this item:
        - A new cost from the **Promotion unit cost** field is valid for the promotion's item throughout all promotion's activity period.
        - The promotion unit cost is considered as the negotiated item's cost. For more information about the difference between the item's promotion and negotiated cost, see Setting Up Item Cost.
    - **Price change**
    - **Price reduction**

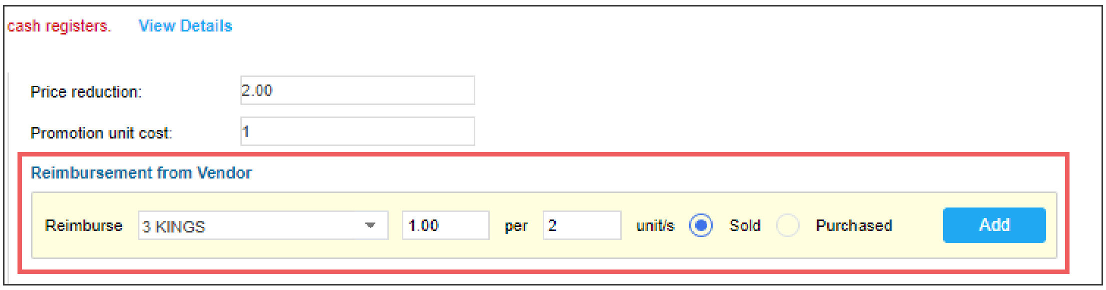
    > Promotion's basic parameters are displayed depending on the selected **Promotion Type** value.



For more information about how to configure basic promotion parameters for each promotion type, see the corresponding promotion type subsection in the Promotion Types section.

3. In the **Reimbursement from Vendor** section, configure the reimbursement from the vendor in case the promotion implies it:
   - In the **Reimburse** list, select the vendor who will reimburse the discount.
   - In the **... per... units** fields, enter the number of items per units, which are bought or sold in order to get the reimbursement.
   - Select **Sold** or **Purchased**, to define whether the reimbursement is paid at purchase or at sale of the items. This option affects the accounting.

> If you need to set up reimbursements from several vendors, click **Add** and for each vendor set up the reimbursement settings as described above.



AN EXAMPLE OF THE REIMBURSEMENT CALCULATION

> *A Marlboro 65 cents off promotion is set up in the following manner:*
>
> *Price Reduction = $0.65*
> *Reimburse = $0.15 from Phillip Morris*

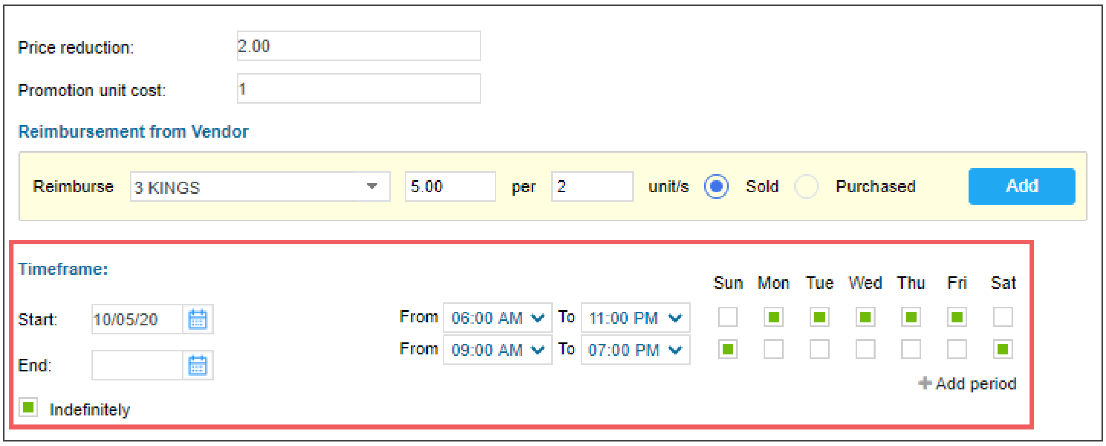
In other words, the items with this promo will be sold at 65 cents off, and when an item is sold, 15 cents will be returned by Phillip Morris. The 15 cents is considered a Buydown, and a price change will be calculated for the remaining 50 cents (65 - 15 = 50).

When taking 130 packs of Marlboro cigarettes into consideration, the total price change will be $65, not $84.5. However, the items should go to inventory at full price, as both the Price Change and Buydown will be taken off (Price Change $65 + Buydown $19.50 = $84.50).

Inclusion in a promotion does not reduce the current retail for the item. Promo items continue to be taken to inventory at their full price.

- If the cash register is connected to the server, the quantity of the items sold by each promotion and the total Price Change and Buydown included in the shift reports will be seen.
- If the cash register is not connected to the server, look in the forms Data Entry/Store/Price Change and Data Entry/Store/Buydown for daily lists of active promotions. The quantity of the items sold by each promotion will have to be entered manually.

4. In the **Time frame** section, specify the period of promotion activity:
   - In the **Start** field, select the promotion starting date.
   - In the **From To** fields, specify the promotion active hours. Select the promotion's active weekdays, if needed.
   - In the **End** field, select the promotion ending date, if any. In case the promotion's ending date and time are not specified, click **Indefinitely**.



5. At the top left of the **Promotion Setup** form, click the **Save** button.

Once the promotion is saved, the following promotion's settings in the **How much** section cannot be edited:

- Type of the promotion's location - in the **Participation** list: You cannot edit the type of the promotion's location but can edit the number of the locations participating in the promotion.
- Promotion's type - in the **Promotion Type** list: The promotion's type cannot be edited, however, the promotion's conditions for the selected locations can be edited.

> If a promotion with the division type in the **Participating** list is being edited, activate at least one division to enable editing in the **How much?** section.

Promo Result

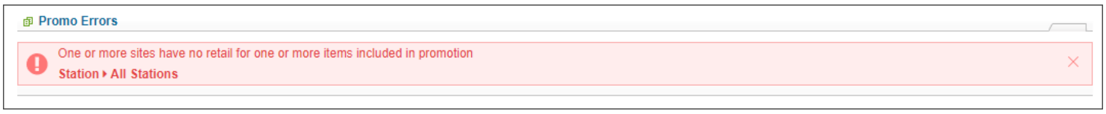
This section displays the promotion result. Each promotion type has its own promo results.

> The detailed explanation of the promo results section for each promotion type is available in the corresponding help article in the Promotion Types section.

Promo Errors

This section displays system error messages, in case the items included in the promotion don't match one or several of the following criteria:

- Items don't exist on the selected station.
- Current Retail Price, Department, or Category are not specified for the items.



Combo Setup Form

The Combo Setup form includes the following sections for configuring the combo settings:

- Combo Header
- What is Included?
- How Much?
- When?
- Where are?
- Promo Errors

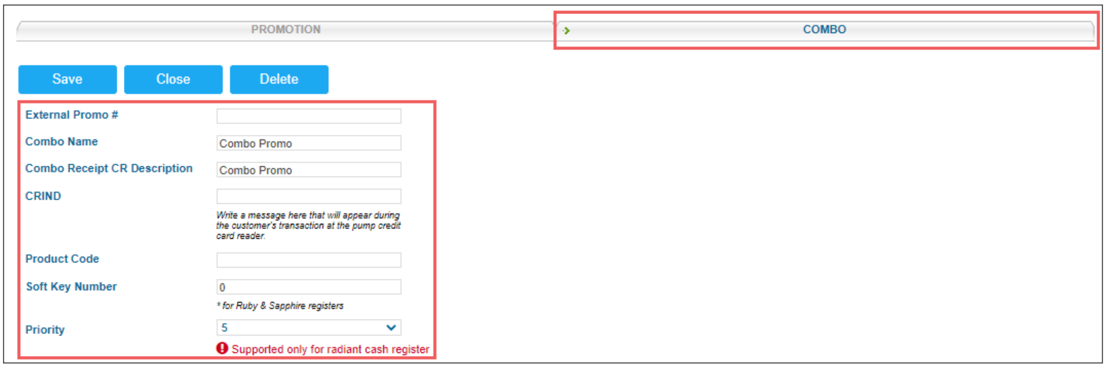
Combo Header

The information at the top of the page identifies the combo promotion in CStoreOffice® and in the cash registers.

Field	Description
External Promo #	External combo identifier. This field is available under the following conditions: - only for Radiant cash registers - if the **Send External Promo # to CR** option is selected at the **Cash Register** form at **Data Entry** > **Dashboard** > **Station Options** > **Cash Register** > **Advanced** > **Advanced** - if the **Allow user to edit Permission for External promo ID** permission is activated for the current user In case one combo is created for several locations, it will be saved with the same External Promo # value for each location.
Combo Name	This is the name of the combo in PIM.
Combo Receipt CR Description	This is the name of the combo in the cash register. It cannot exceed ten characters including spaces.
CRIND	This stands for Card Readers in Dispenser (initially a Gilbarco term, now used generically). A message that will appear during the customer's transaction at the pump credit card reader can be entered. This parameter is currently not supported by the cash registers.
Product Code	This is the code assigned to a combo for identifying it as an item at the cash register.
Soft Key Number	This is the number of the soft key assigned to this combo on the cash register. Supported only by Ruby and Sapphire registers.
Priority	In case you have several promotions for same group of items, specify the priority in which the promotion will be applied on the cash register in order to be in compliance with the vendor policy. Possible values: - **Empty**: Leave the Priority field blank, if you have only one

Field	Description
	promotion for one certain group of items. - **From 0 to 10**: Define the promotion's priority by setting up the lowest value to the highest priority level. The **Priority** field is supported only by the Radiant cash registers. For more information about promotion limitations depending on the CR type, see Compatible Cash Registers.

Above these fields, there are also buttons for saving the changes made to the combo and closing the form without saving the changes.



What is Included?

In this section, the following needs to be defined:

- The items to be included in the combo. For details, see Including Items in Combo.
- The settings these items will have. For details, see Configuring Items Settings for Combo.

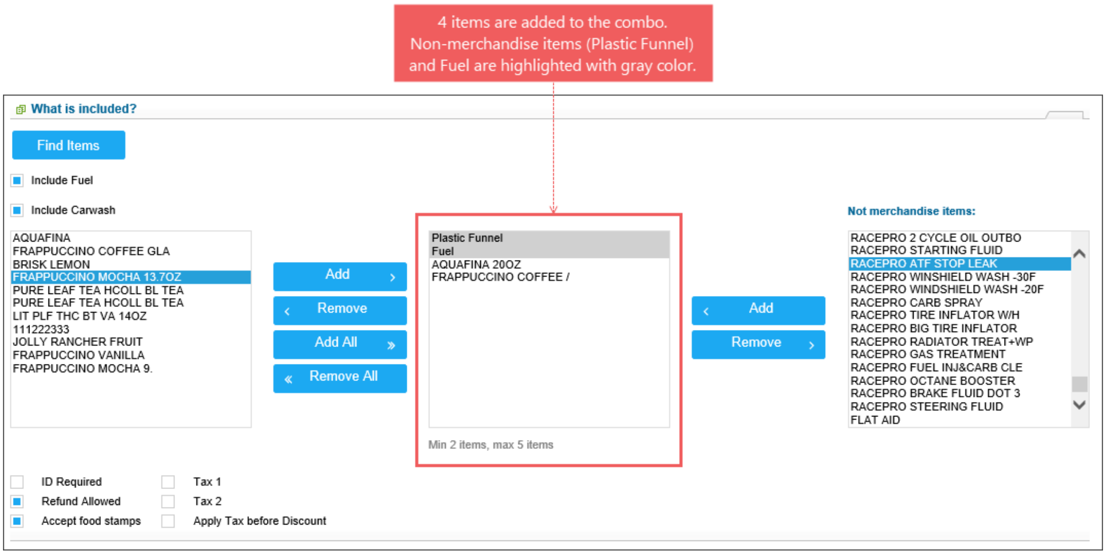
Including Items in Combo

The following types of items may be included in the combo:

- Items - including common items to your combo
- Fuel - including any type of fuel on the station to your combo
- Car Wash - including to your combo the items from the following types of departments:
  - 'Car Wash' departments
  - 'Other Income' departments where the Income Type value equals ' Car Wash' or 'CarWash'.

The combo may contain a minimum of two and a maximum of five items.

All types of items included in the combo are displayed in the second column in the What is Included? section.



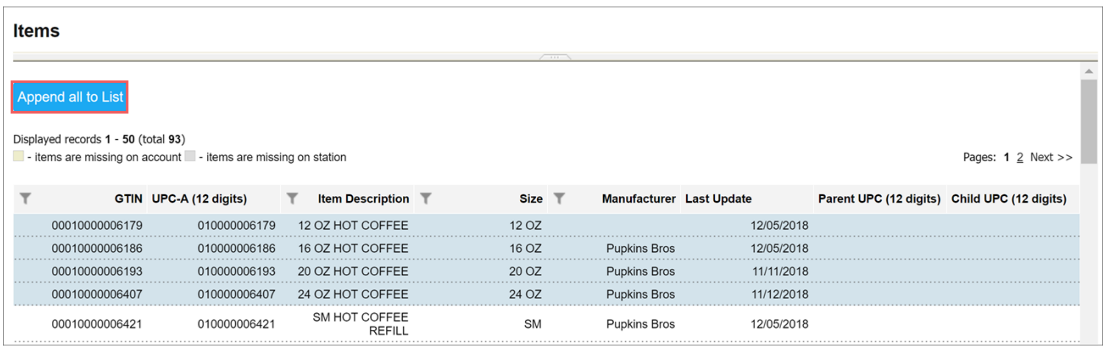
Adding Items to Combo

To select the items for the combo, follow these steps:

1. Click **Find Items** to add the desired items to the left column.

   Result: The **Items** list opens in a new window.

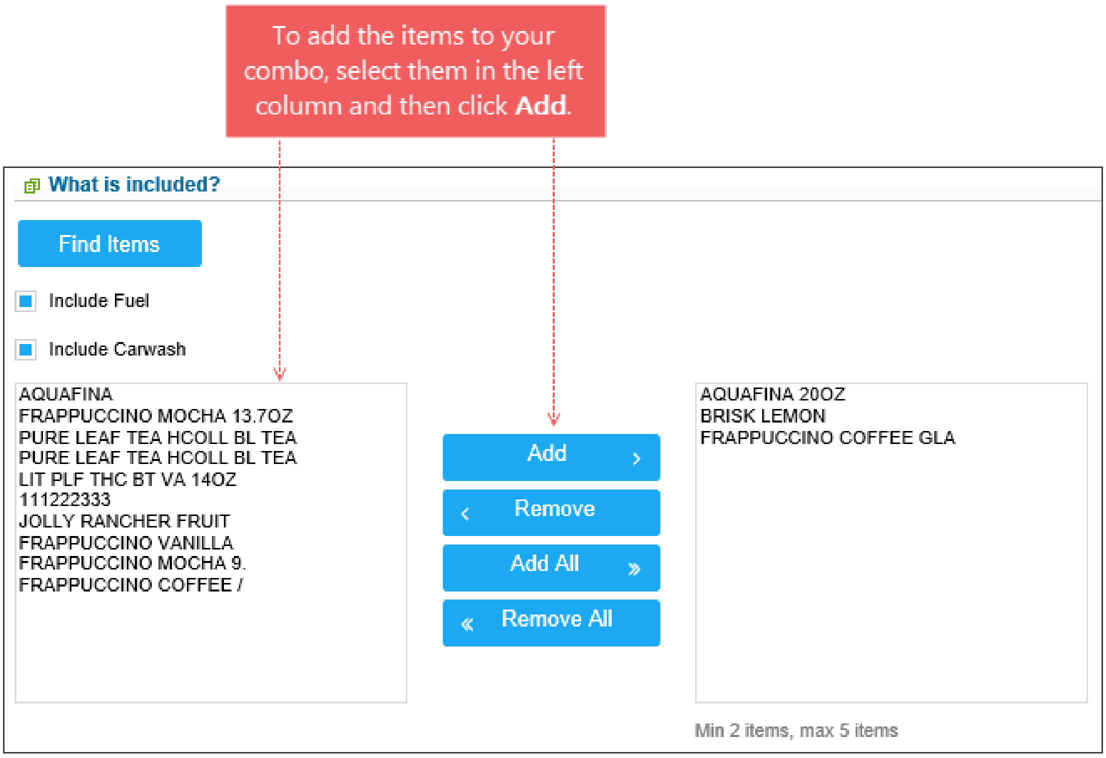
2. Use the Find and Replace tool to find the necessary items.
3. Select the items to be included in the combo.
4. Click the **Append all to List** button above the items list.



   Result: The selected items appears in the **What is included** section in the left column.

5. In the **What is included?** section > left column, select the desired items to add to the combo.

6. On the right of the left column, click **Add**.

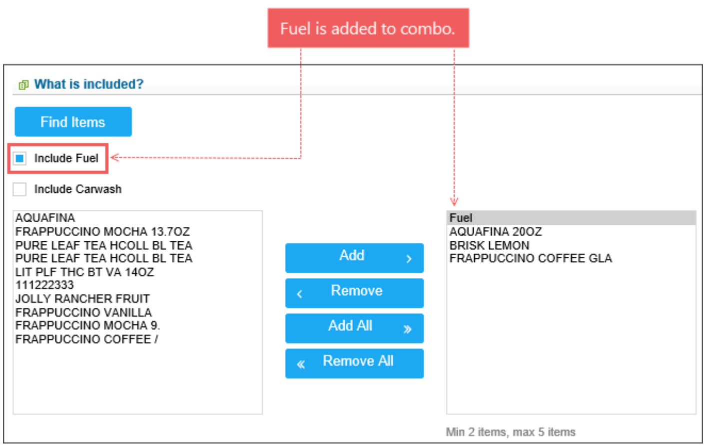


To remove the items from the combo column, select them and click **Remove**.
To add all items from the left column to the combo column, click **Add All**.
To remove all items from the combo column to the left column, click **Remove All**.

Adding Fuel to Combo

To add the fuel to the combo, select the **Include Fuel** option.

To remove the fuel from the combo, clear the **Include Fuel** option.



Adding Car Wash Items to Combo

To add the car wash items to the combo, follow these steps:

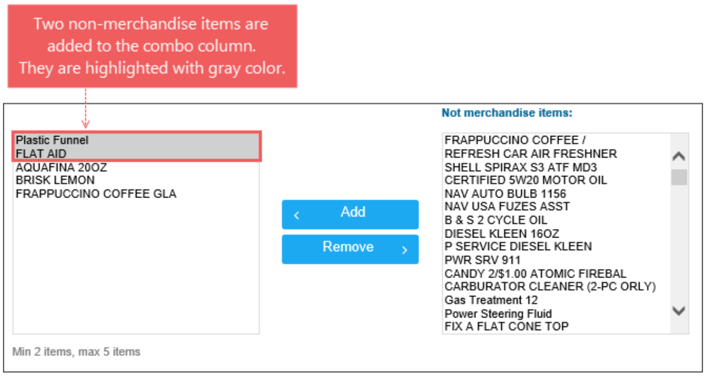
1. Select the **Include Carwash** option.

   Result: All available non-merchandise items appear in the **Not merchandise items** column.

2. In the **Not merchandise items** column, select the desired items to be added to the combo.
3. On the left of the **Not merchandise items** column, click **Add**.

   Result: The items are added to the combo column.

> To remove the non-merchandise items from your combo, on the left of the **Not merchandise items** column, click **Remove**.



Configuring Items Settings for Combo

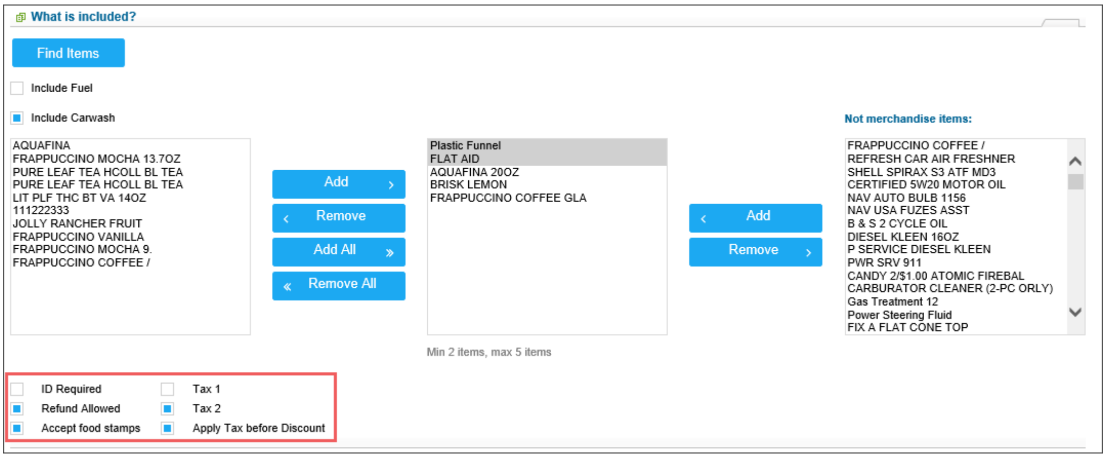
In the **What is included** section, the following items settings can be configured for the combo:

- **ID Required** - Select this check box to enable the requesting support documents option for this combo.
- **Refund Allowed** - Select this check box to enable the transactions refund for this combo.
- **Accept food stamps** - select this check box to allow using food stamps to pay for this combo.
- **Tax 1** and **Tax 2** - Select the taxes to be applied to the combo.

> For more information about items taxes, see .

- **Apply Tax before Discount** - Select this option to calculate the tax amount before applying the combo price and send this tax amount to a cash register (only for Ruby Sapphire cash registers). Make sure the 'Allow Tax before Mix and Match Discount' option is selected at **Data Entry** >

Dashboard > **Cash Register** > **Advanced**.

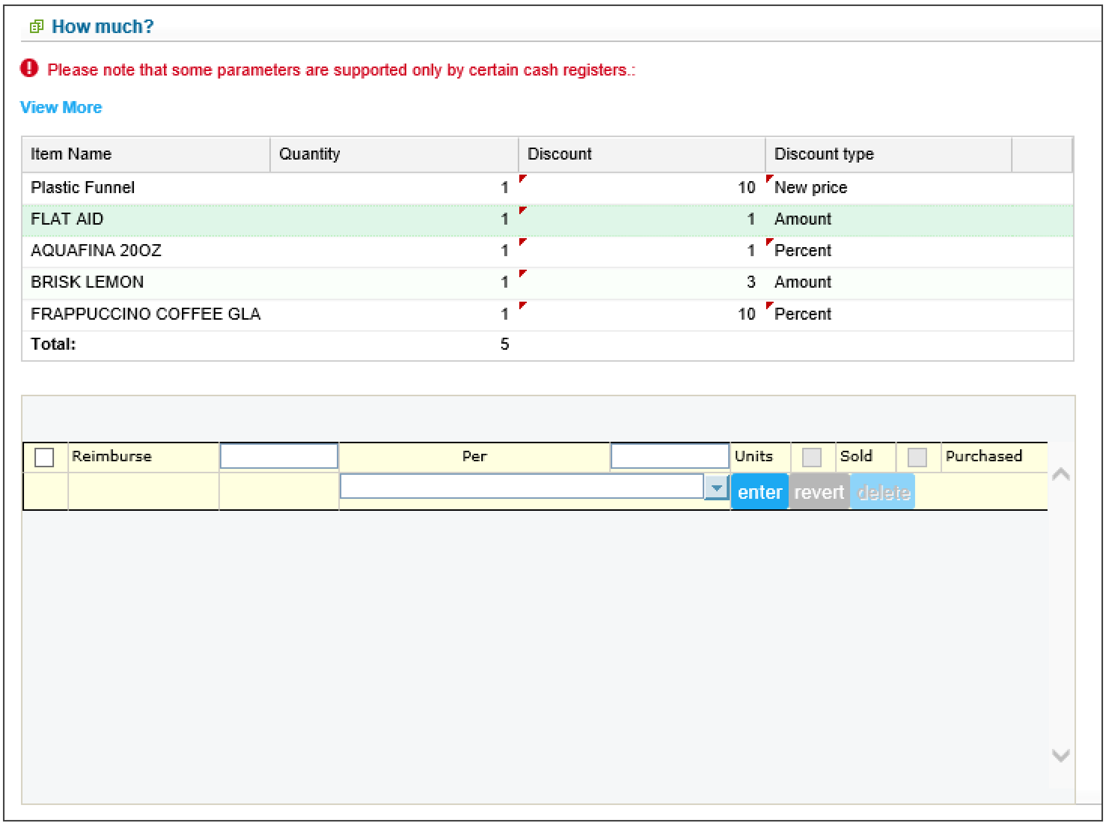


How Much?

In the **How Much** section, for each item included in the combo, specify the following parameters:

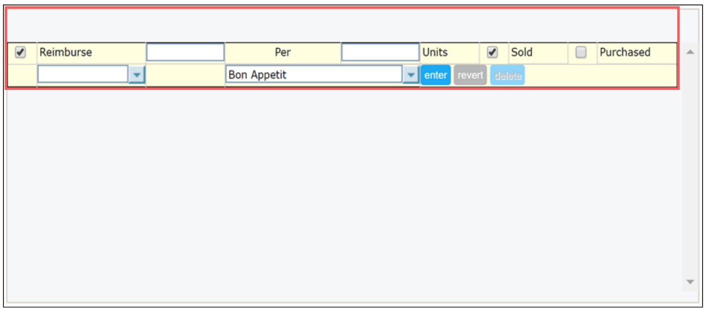
- **Quantity** - the number of items to be sold together within this combo.
- **Discount** - the value of discount selected in the Discount type column and applied to this item. This field is mandatory for the Combo promotion.
- **Discount type** - one of the following discount types:
  - **New price** - replaces the current item price by the predefined price value
  - **Amount** - reduces the item price by the predefined amount

- **Percent** - reduces the item price by the predefined percent



Buydown

This section does not have a heading and is just below the **How Much?** section. If the combo implies a buydown from the vendor, enter the buydown information here. Leave the section blank if the combo is not eligible for a buydown.



- **Reimburse**: Select this check box if the combo provides the Buydown. Enter the Buydown amount in the field to the right.
- **Per….Units**: This is the number of items units, which are bought or sold in order to receive the Buydown.
- **Sold or Purchased**: Mark whether the Buydown is applied at the time items are purchased or sold. This option affects accounting.

- **Vendor**: In the line below, select a vendor who will be returning the Buydown. Upon setting all necessary parameters, click **enter**.

Sometimes the Buydown is paid not by one but by several vendors, in such case it is necessary to enter each vendor’s conditions into the combo settings.

The difference between the price reduction and the total reimbursement will automatically be calculated by the system.

Inclusion in a combo does not reduce the current retail for the item. Combo items continue to be taken to inventory at their full price.

- If the cash register is connected to the server, the quantity of the items sold by each combo and the total Price Change and Buydown included in the shift reports will be seen.
- If the cash register is not connected to the server, look in the forms Data Entry/Store/Price Change and Data Entry/Store/Buydown for daily lists of active combos. The quantity of the items sold by each combo will have to be entered manually.

Example of a buydown calculation

A Marlboro 65 cents off promotion is set up in the following manner:

Price Reduction = $0.65

Reimburse = $0.15 from Phillip Morris

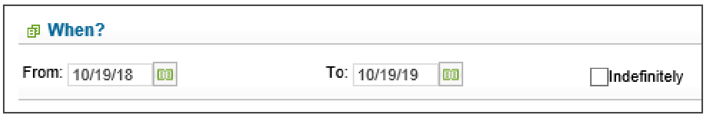
In other words, the items with this combo will be sold at 65 cents off, and when an item is sold, 15 cents will be returned by Phillip Morris. The 15 cents is considered a Buydown, and a price change will be calculated for the rest 50 cents (65 - 15 = 50).

When taking 130 packs of Marlboro cigarettes into consideration, the total price change will be $65, not $84.5. However, the items should go to inventory at full price, as both the price change and buydown will be taken off (Price Change $65 + Buydown $19.50 = $84.50).

When?

In this section, define the time frame of the combo:

- Use the calendar icon to set the start date.
- Use the calendar icon to set the end date or select the **Indefinitely** check box if your combo does not have an end date.



Where are?

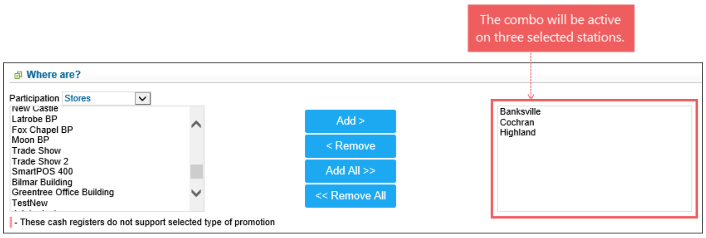
In this section, select the locations on which your combo will be active.

To select one or several locations for the combo, follow these steps:

1. In the **Participation** list, select the type of the combo's location.
   Result: The list of locations for the selected type is displayed in the left column.

   > Make sure neither **Division**, nor **Company** is selected as these two location types are not supported in PIM.

2. In the left column, select the locations for which the combo is being created.
3. Click **Add**.
   Result: The locations are added to the right column. The combo will be active for these locations.

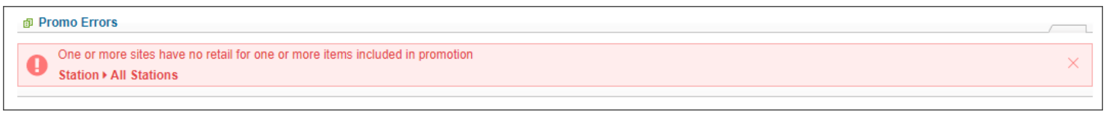


> To remove the locations from the right column, select them and click **Remove**.
> To add all locations from the left column to the right column, click **Add All**.
> To remove all locations from the right column to the left column, click **Remove All**.

Promo Errors

This section displays system error messages, in case the items included in the combo don't match one or several of the following criteria:

- Items don't exist on the selected station.
- Current Retail Price, Department, or Category are not specified for the items.



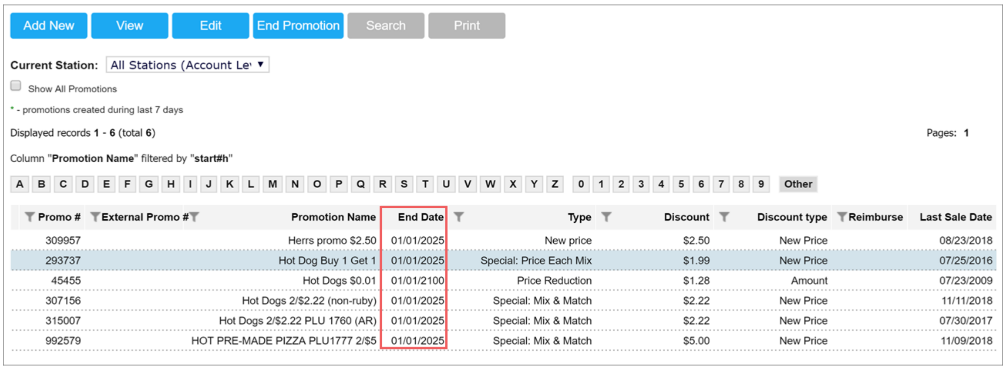
Editing Promotion

Before editing an active promotion, make sure you have an access to all sites or locations for which the promotion is activated. If the promotion is activated for at least one site or location inaccessible to your user, the promotion cannot be edited. The sites or locations activated for the promotion can be checked in the **Participation** list of the **How much?** section. For more information on how to configure the Participation list, see How much?.

It is strongly recommended not to edit the existing promotions that are actively used at your locations as it may affect the data accuracy. In these cases, we recommend to create new promotions. For details, see Adding New Promotion.

To edit an existing promotion or combo:

1. Open the **Promotions** list. In PIM main menu, click **Discount Management**.
2. In the **Promotions** list, find a promotion or combo you want to edit.
3. Make sure the promotion or combo is active. Check the promotion's or combo's end date—it should be greater than the current date.



Promo #	External Promo #	Promotion Name	End Date	Type	Discount	Discount type	Reimburse	Last Sale Date
309957		Herrs promo $2.50	01/01/2025	New price	$2.50	New Price		08/23/2018
293737		Hot Dog Buy 1 Get 1	01/01/2025	Special: Price Each Mix	$1.99	New Price		07/25/2016
45455		Hot Dogs $0.01	01/01/2100	Price Reduction	$1.28	Amount		07/23/2009
307156		Hot Dogs 2/$2.22 (non-ruby)	01/01/2025	Special: Mix & Match	$2.22	New Price		11/11/2018
315007		Hot Dogs 2/$2.22 PLU 1760 (AR)	01/01/2025	Special: Mix & Match	$2.22	New Price		07/30/2017
992579		HOT PRE-MADE PIZZA PLU1777 2/$5	01/01/2025	Special: Mix & Match	$5.00	New Price		11/09/2018

For information on how to continue inactive promotion or combo, see Continuing Promotions.

4. Select the promotion or combo, and then click **Edit**.
5. Edit the promotion's or combo's settings. For more details, see the Promotion Setup Form or Combo Setup Form correspondingly.

   Not all settings of active promotions are editable. To view the whole list of editable settings, see Editable Settings of Active Promotion.

   In the **How much** section, the **Participating** and **Promotion type** values are not editable.

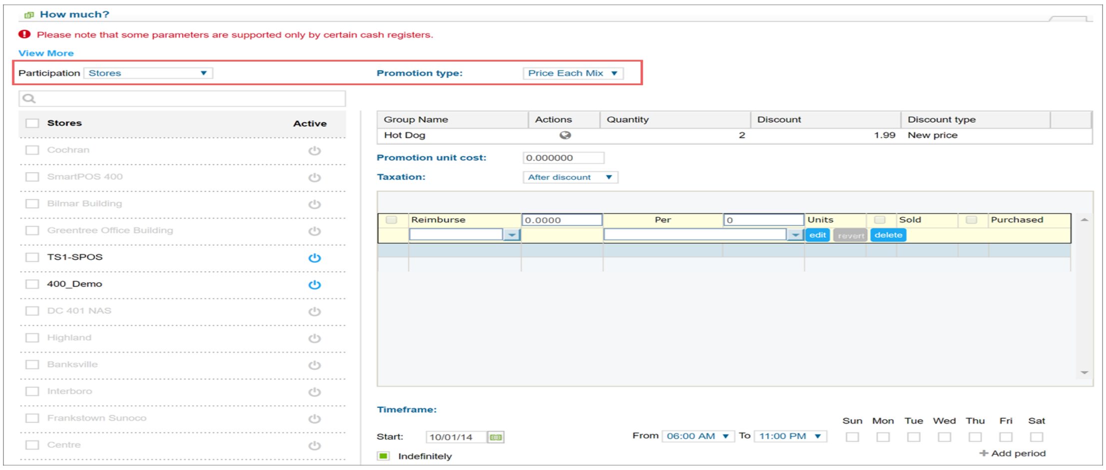
6. At the top left of the promotion or combo setup form, click **Save**.
7. This is optional - In case you are changing the promotion period or making other essential changes in a promotion's settings, in the **Save Window** that is displayed, select one of the following options and then click **Save**:

- **Create new Promotion** - creating a new promotion based on the current promotion settings
- **Edit current Promotion** - editing current promotion and making promotion recalculation for the selected period

Editable Settings of Active Promotion

- In the promotion header - Change promotion name or description.
- In **What is included?** section - Change items included to the promotion.
- In the **Loyalty** section - Change promotion loyalty settings.
- In the **How much?** section - Change the number of stores, companies, stations, or divisions participating in the promotion and update the promotion settings.

You cannot change the type of the promotion's location and the promotion type.



You can also continue promotion expiring soon or inactive ended promotion. For more details, see Continuing Promotions.

Deleting Promotion

You can delete only promotions which have not begun yet. The starting date of such promotions is older than the current date. All active promotions with the starting date which is less than the current date can be only ended, but not deleted.

For more information about how to end an active promotion, see Ending Promotion.

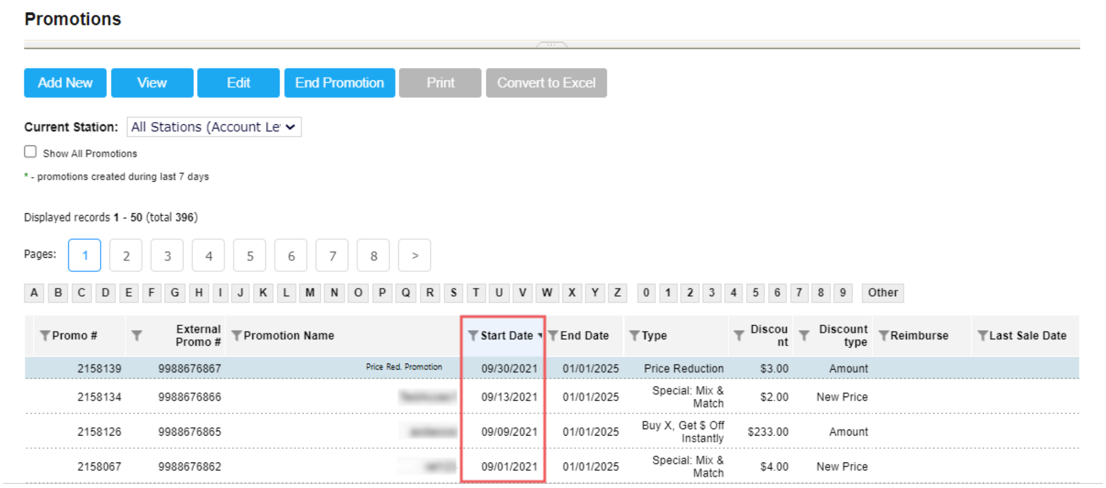
To delete a promotion:

1. From the main CStoreOffice® menu, go to **Price Book** > **Promotions**.
   Result: The Promotions list opens.

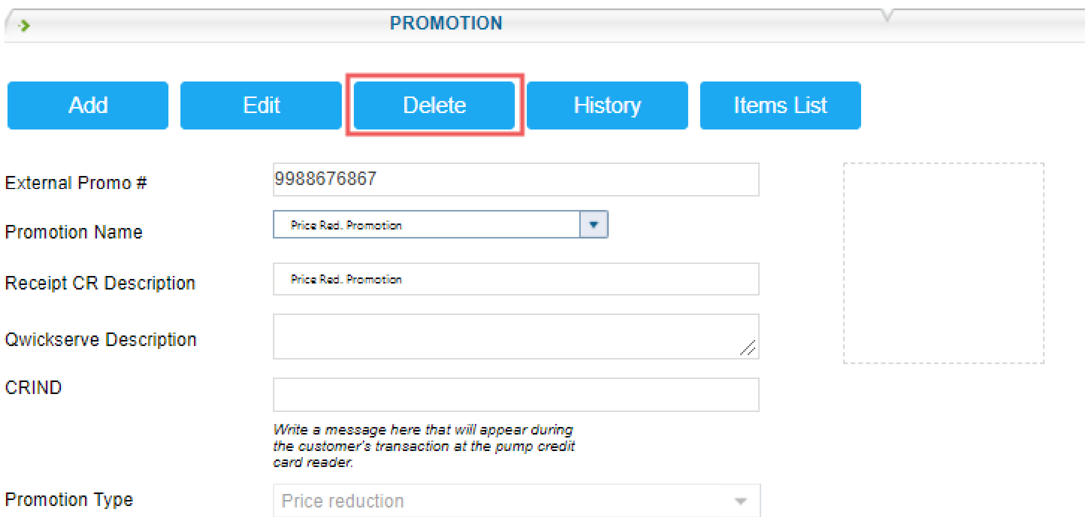
2. In the **Promotions** list:

   a. Select the promotion you want to delete.

   > Make sure the promotion's starting date is older than the current date. You can check it in the **Start Date** column.



   b. In the promotion setup form, click **Delete**.



   The **Delete** button is displayed only if the promotion's starting date is older than the current date. Otherwise, the **End Promotion** button is displayed instead.

   c. Confirm the deletion.

Ending Promotion

Ended promotions become inactive in CStoreOffice® and do not apply to the items anymore. Ended promotion cannot be reactivated again as it may affect the data accuracy.

Before you end a promotion either for a separate station or for the whole account, make sure you do not need to use this promotion in the future. If so, you can create a new one by copying the ended promotion. For details, see Continuing Promotions.

You can end a promotion in the following ways:

- Ending a Promotion for the Whole Account
- Ending a Promotion for a Certain Location or Tag

To make sure the promotion is ended, check it in the Promotions list. For details, see Viewing the Ended (Inactive) Promotions.

You cannot deactivate the promotion, if it has the items from the category that has the **Block Promo Acceptance** option activated. For details, see Categories.

Ending a Promotion for the Whole Account

To end a promotion or a combo for the whole account:

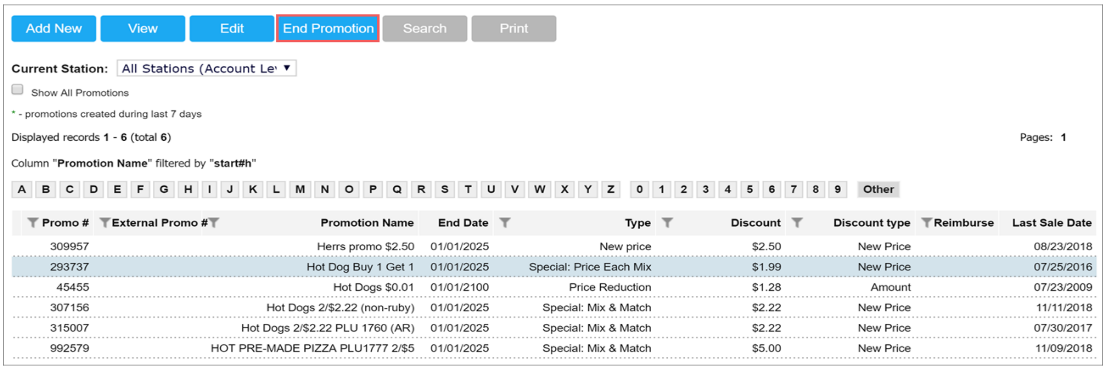
1. From the main CStoreOffice® menu, go to **Price Book** > **Promotions**.

   Result: The Promotions list opens.

2. In the **Promotions** list:

   a. Select the promotion you want to end.

   b. Click the **End Promotion** button.

   Please note that the **End Promotion** button is permission-based. It is displayed only for the users with the **Allow users to End Promotion on the Promotion form** permission granted.

   c. Confirm the **End Promotion** operation.

   d. Accept changes to send them to the cash register. For details, see Reviewing and Accepting Changes.

In order not to accept changes manually each time a promotion is updated, you may activate the **Accept Price Book changes automatically** option in the cash register settings in CStoreOffice®. For details, see Accepting Promotion Changes Automatically.

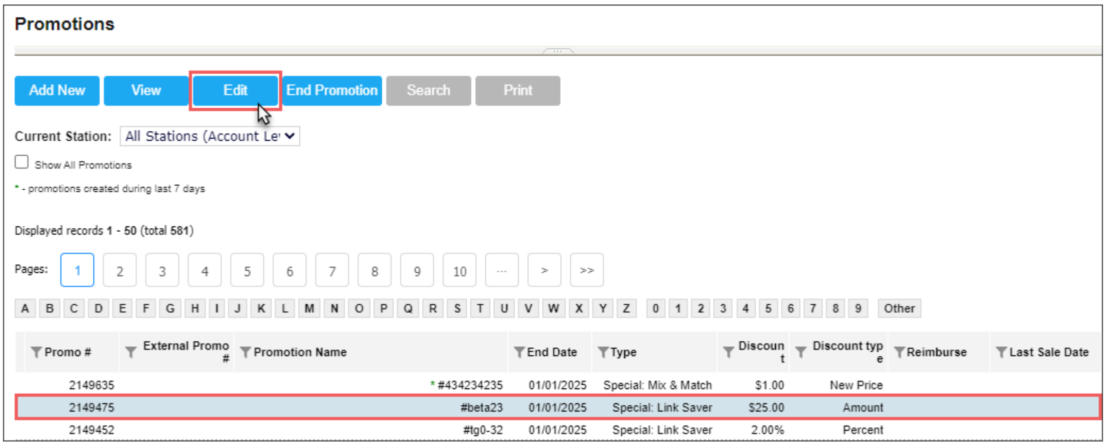
Ending a Promotion for a Certain Location or Tag

To end a promotion for a certain tag, such as Division, Area Manager, Price Zone and so on, follow the steps from the procedure below.

> If you need to end a for a certain location (Stores or Location tag), at first end the whole promotion (see Ending a Promotion for the Whole Account) and then create this promotion again only for the locations (stations) you need.

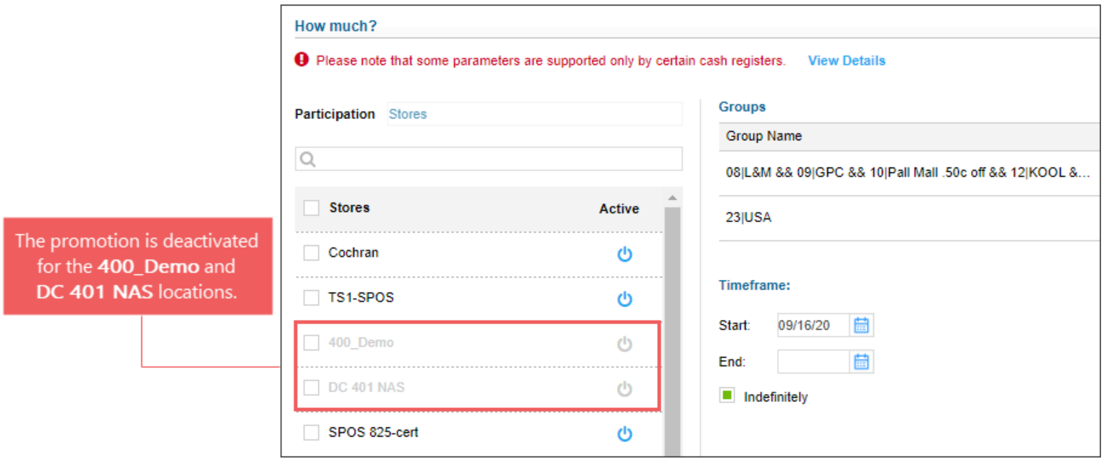
(For non-store promotion locations only) To end a promotion for a certain location or tag:

1. From the main CStoreOffice® menu, go to **Price Book** > **Promotions**.
   Result: The Promotions list opens.
2. In the **Promotions** list:
   a. Select the promotion you want to end.
   b. Click the **Edit** button.



   Result: The Promotion editing form opens.

3. In the Promotion editing form, go to the **How much?** section > **Participation** list.
4. In the **Participation** list, deactivate location or another tag, for which you want to end a promotion.



5. At the top left of the form, click **Save**.

> Please note that if **Stores** or **Location** is selected in the **Participation** list and you deactivate one or several locations (stations) for the promotion, you can only save these changes by creating a new promotion.

6. Accept changes to send them to the cash register. For details, see Reviewing and Accepting Changes.

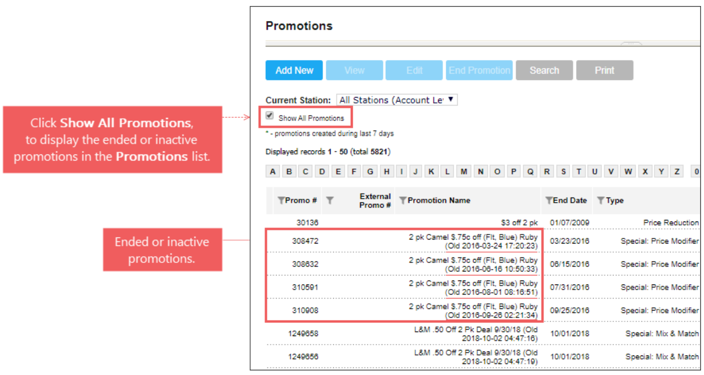
> In order not to accept changes manually each time a promotion is updated, you may activate the **Accept Price Book changes automatically** option in the cash register settings in CStoreOffice®. For details, see Accepting Promotion Changes Automatically.

Viewing the Ended (Inactive) Promotions

To view the ended or inactive promotions:

1. From the CStoreOffice® home page, click **Price Book** > **Promotions**.
2. In the **Promotions** list, click **Show All Promotions**.

   Result: The list of Promotions reloads to display all promotions including that of ended or inactive promotions.



The names of ended or inactive promotions include the following tag in parentheses at the end: *(Old YYYY-MM-DD HH:MM:SS)* where the YYYY-MM-DD and HH:MM:SS values indicate the promotion's ending date and time correspondingly. This tag is added automatically once a promotion is ended.

Continuing Promotion

A promotion can be continued in the following two ways:

- Continue active promotion expiring soon
- Continue inactive or ended promotion

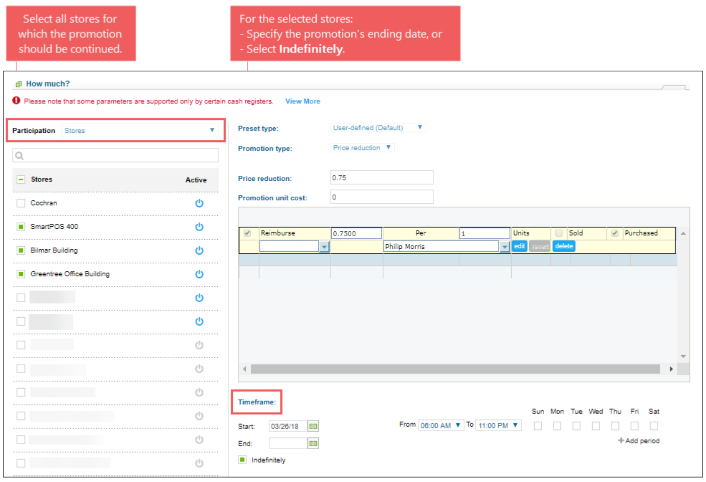
Continuing Active Promotion Expiring Soon

To continue an active promotion expiring soon, follow these steps:

1. Open the **Promotions** list. In PIM main menu, click **Discount Management**.
2. In the **Promotions** list, find a promotion or a combo that is to be continued.
3. Select this promotion or combo and then click **Edit**.
4. Go to the **How much?** section > **Participation**.
5. Select all objects for which you need to continue the promotion.

For all active unselected objects in the Participation section, the promotion's ending date will remain the same.

6. Go to **Timeframe** and then do one of the following:
   - In the **End** field, select the new date for the promotion or combo.
   - Click **Indefinitely**, to leave the end date open.



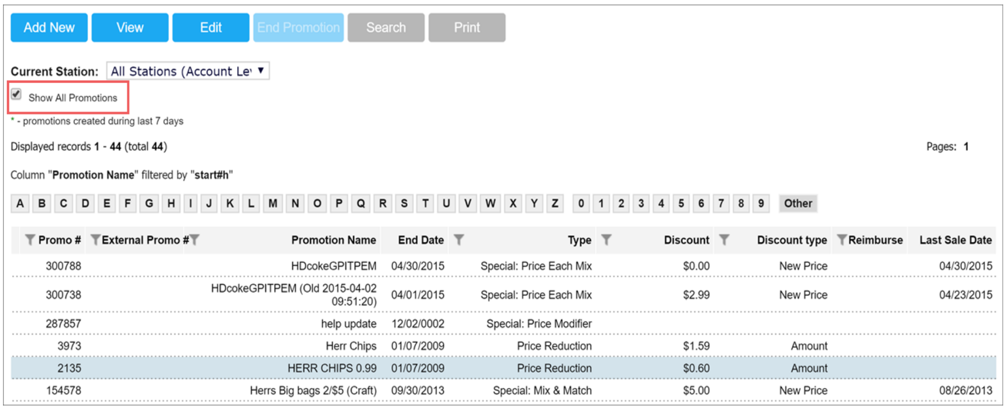
7. At the top left of the **Promotion Setup** form, click the **Save** button.

Continuing Inactive or Ended Promotion

To create a copy of inactive or ended promotion or combo, follow the steps:

1. Open the **Promotions** list. In PIM main menu, click **Discount Management**.
2. In the **Promotions** list, find a promotion or combo that is to be copied.

> To view inactive or ended promotions in the search results, select the **Show All Promotions** check box in the **Promotions** list.



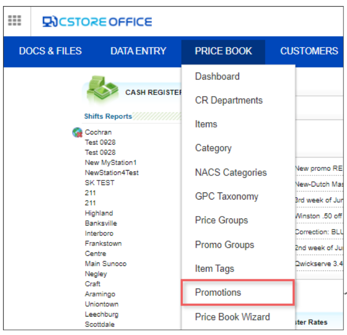
3. Select an inactive promotion or combo, and then click **Edit**.
4. At the top left of the **Promotion Setup** form, click the **Create Copy** button.
5. Edit the new promotion's or combo's settings. For more details, see Editing Promotion.

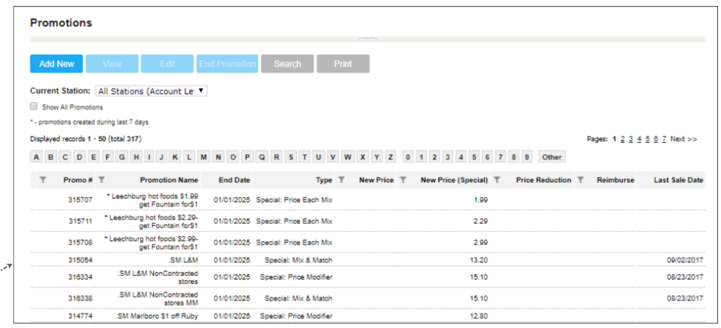
> You can use the same name as that of the ended promotion. The active and ended (inactive) promotions with the same name are differentiated by the special tag which is added automatically in parentheses at the end of the ended promotion's name. For details, see Ending Promotion.

6. At the top left of the **Promotion Setup** form, click the **Save** button.

Working with Promotions List

To open the **Promotions** list, in PIM main menu, click **Discount Management**.





The following operations can be performed with the promotions in the Promotions list:

- Searching for promotions
- Filtering search results
- Customizing search results
- Viewing promotions that will be run in the future

Searching for Promotions

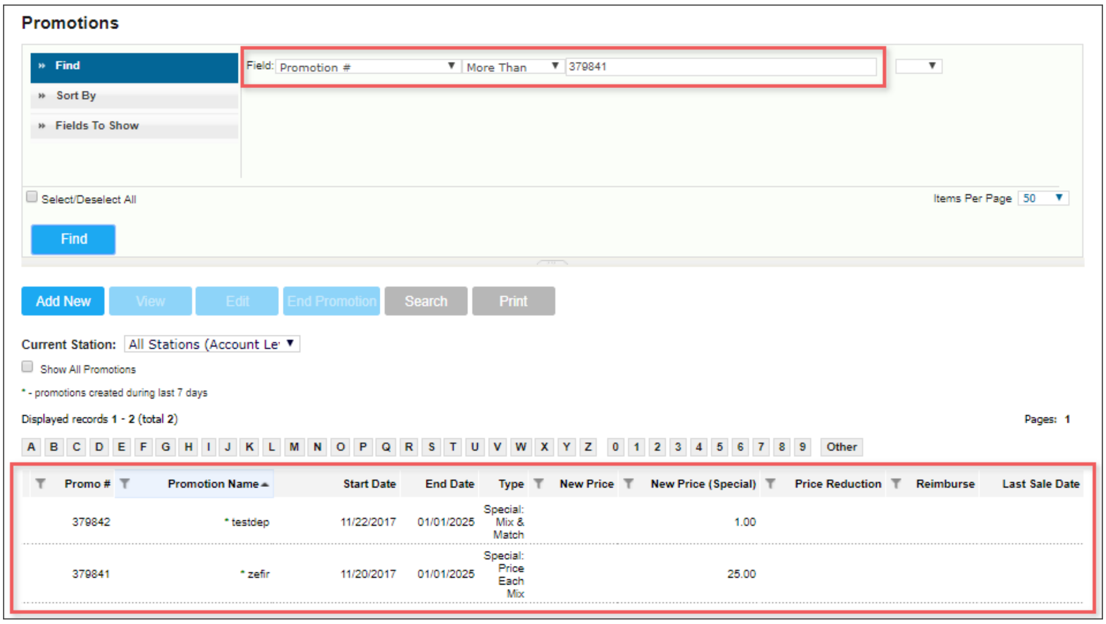
To find promotions, follow these steps:

1. In the **Promotions** list, expand the **Find and Replace** tool.
2. In the left menu, click **Find**.

3. To find each field in the table, specify the following parameters:
   a. **Desired field** - Select the field based on which the search criteria should be specified.
   b. **Search operator** - Select one of the following search operators:
      - **Like** - Select this operator to find promotions with values similar to search values in the desired field.
      - **Equal** - Select this operator to find promotions that match the search value in the desired field.
      - **Empty** - Select this operator to find all the promotions for which there is no such entry in the desired field.
      - **Exclude** - Select this operator to find all promotions with no search value in the desired field.
      - **More than** - Select this operator to find all promotions with values that are more than the search value in the desired field.
      - **Less than** - Select this operator to find all promotions with values that are less than the search value in the desired field.
      - **Any** - Select this operator to find all promotions with the desired field.
   c. **Search value** - Enter the value that is needed in order to search.

d. This is optional - One more field - select the **and** or **or** value to add one more field based on the desired search. One more desired field can be added to search in the following cases:
   - Select **and** to find promotions complying with several parameters.
   - Select **or** to find promotions, for example, in two promo groups, but avoiding to make a search twice.

4. This is optional - Apply additional options to the search results in advance. For details, see Filtering Search Results.
5. At the left bottom of the tool, click the **Find** button.

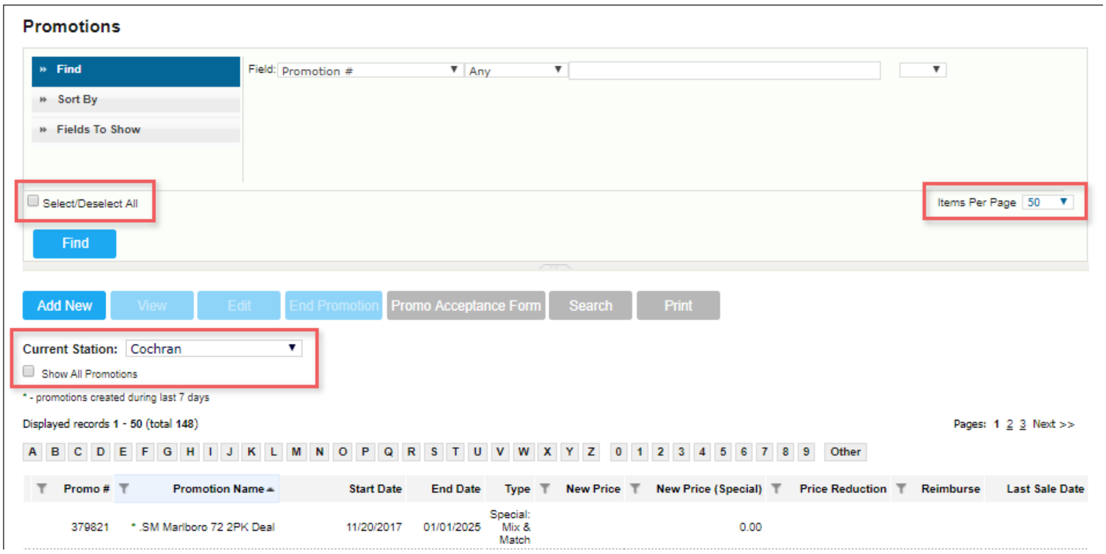


Filtering Search Results

To filter the search results, at the bottom of the Find and Replace tool, use any of the following options:

- **Select/Deselect All** - Use this option to select or deselect all the promotions in the search results. Do not use it as an additional search option.
- **Items Per Page** - Select the desired number of items that are to show on one page.
- **Current Station** - Select a station for displaying this station's promotions only. Select **All Stations** to display all promotions.
- **Show All Promotions** - Select this option to display all promotions, including the ended

promotions.

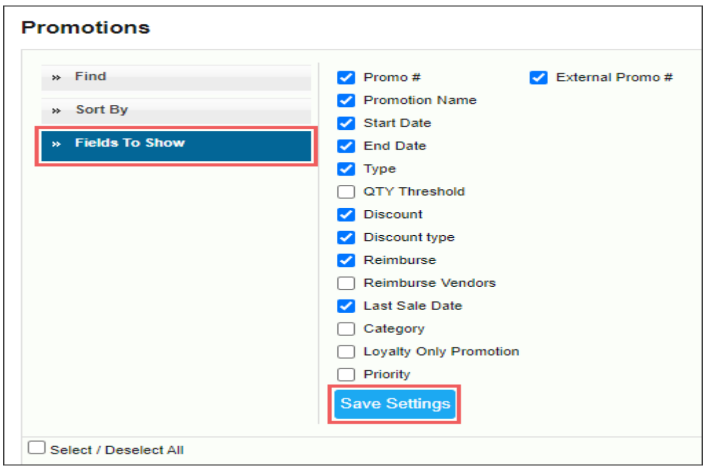


Customizing Search Results

To customize the search results in the Find and Replace tool, use the following sections:

- **Sort By** - Click this section and then select the sorting criteria in the first turn.

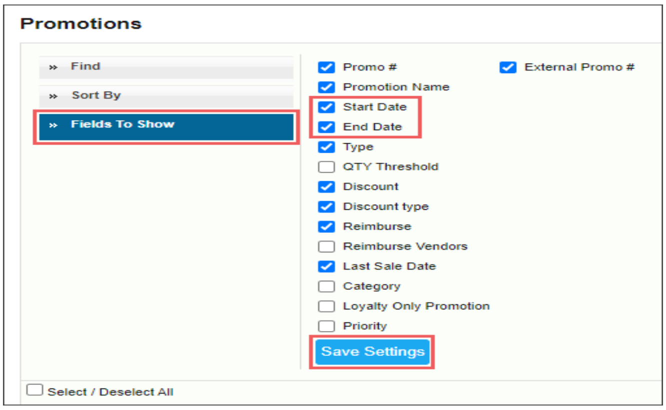
- **Fields to Show** - Click this section and select the fields for displaying in the search results. Then click **Save Settings**.



Viewing Future Promotions

To view what promotions are set to run in the future, follow the steps:

1. Make sure the **Start Date** and **End Date** columns are displayed in the **Promotions** list. If not—do the following:
   a. Open **Operational Panel**, using the Operational Panel Switcher.
   b. In the left menu, click **Fields To Show**.
   c. Select the **Start Date** and **End Date** check boxes.
   d. Click the **Save Settings** button.



   e. Reload the **Promotions** list.
2. Sort the promotions list by the **Start Date** column in descending order.

Viewing Promotions Reports

The following promotions reports can be viewed in CStoreOffice®:

- List of Promotions Report: This report provides advanced information on the account's promotions.
- Promotion History Report: This report provides the information about changes made to the selected promotion.

- Promotions Report: This report provides information on all promo groups and promotions on the station classified by categories.
- Promotions Acceptance Report: This report provides information on stations active promotions.
- Promotions by Tag Report: This report provides advanced information on the existing promotions for the specified period.

List of Promotions Report

This section describes the specifics of accessing and interpreting the List of Promotions report.

Opening Report

You can open the report in one of the following ways:

- Go to **Reports** > **PB** > **Promotions** > **List of Promotions**.
- Go to **Price Book** > **Promotions** > **Related Information** section > **List of Promotions**.

For more information, see Viewing Reports.

Viewing Report

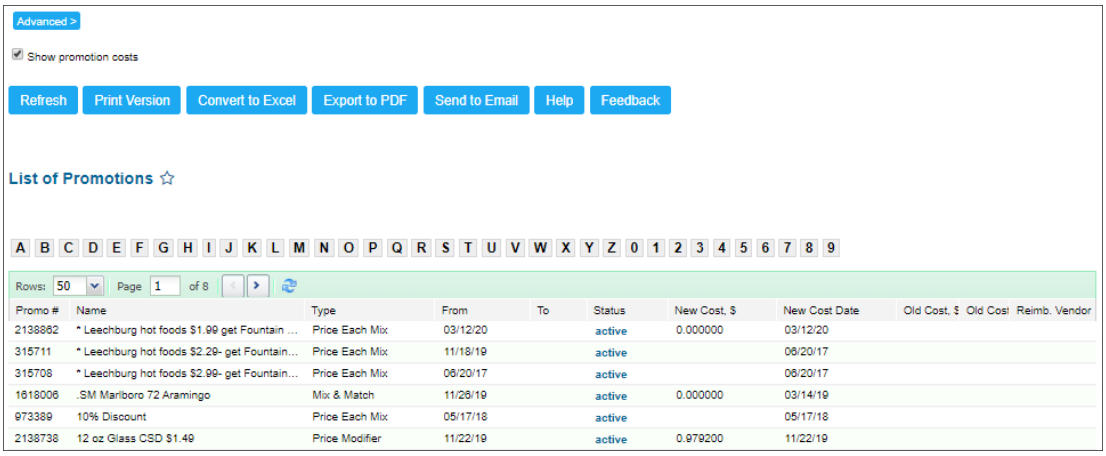
List of Promotions report provides advanced information on the account's promotions.

The report contains the following information:

- **Promo #**: Promotion ID
- **Name**: Promotion name
- **Type**: Promotion type
- **From**: Promotion start date
- **To**: Promotion last date
- **Status**: Active/Inactive
- **New Cost**: Promotion items cost
- **New Cost Date**: Date of promotion cost setup
- **Old Cost**: Promotion items previous cost
- **Old Cost Date**: Date of promotion previous cost setup

> To display the **New Cost**, **New Cost Date**, **Old Cost**, **Old Cost Date** fields in the report, select the **Show promotion costs** option at the top of the report and then click the **Refresh** button.

- **Reimb.Vendor**: Reimburse vendors names list

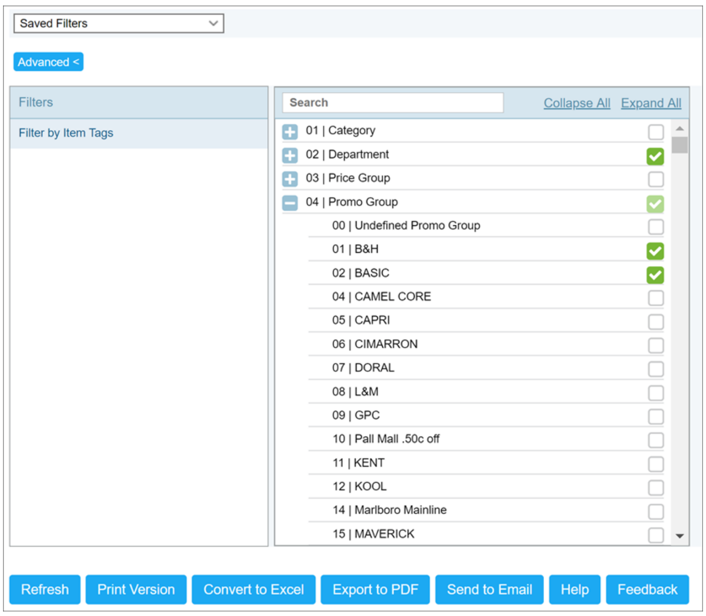


Filtering Report Data

To get the exact information you need, you can apply filters to the report. To set up a filter, select one or more filtering options. Once the filter is set up, at the bottom of the filter section, click the **Refresh** button to display the report data by the filter criteria.

To filter the report results by the item tags, click **Advanced** > **Filter by Item Tags**, select item tags and then click **Refresh**.

Use this option to filter the report data by tags assigned to items. The generated report will contain data only for those items to which the selected tags are assigned.
To select tags by which the report data must be filtered, expand the tags tree and select the check boxes next to the necessary tags. You can filter the report data by root tags and tags of the lower level in the tags hierarchy. You can also create a combined filter by selecting different root and child tags.



Press **CTRL**, to select several items at a time.
Select the **Show Only** option to view only the information for the selected items, and **Show All Except** to view the information for all the items except the selected ones.

Additional Actions

To reload the form, click **Refresh**.

To print the report, click **Print Version**.

To view the report in the Excel version, click **Convert to Excel**.

To view the report in the PDF version, click **Export to PDF**.

In case of large amount of data in the report, we recommend you before exporting report data to the Excel or PDF version, make sure the **Show promotion costs** option at the top of the report is not selected.

For more information on additional report features, see Reports.

Promotions Report

This section describes the specifics of accessing and interpreting the Promotions report.

Opening Report

You can open the report in one of the following ways:

- Go to **Reports** > **PB** > **Promotions** > **Promotions**.
- Go to **Price Book** > **Promotions** > **Related Information** section > **Promotions**.
- Go to **Price Book** > **Items** > search for an item > click **View** > click **Promotions**.

For more information, see Viewing Reports.

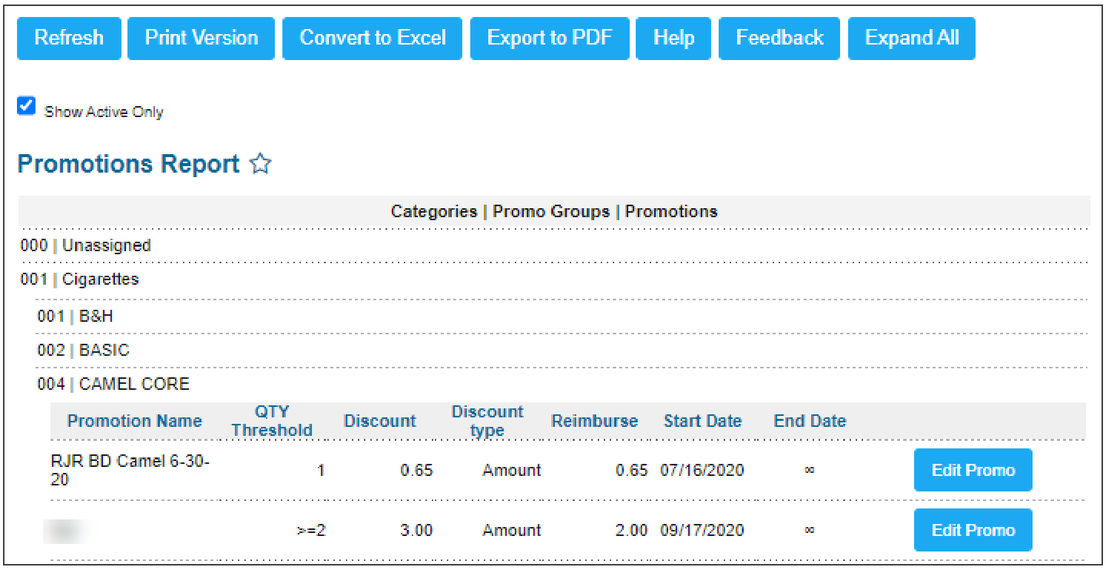
Viewing Report

The Promotions report provides information on all promo groups and promotions on the station classified by categories.

The report contains of the following information:

- **Categories**
- **Promo Groups**
- **Promotions**:
    - **Promotion Name**

- **QTY Threshold**
- **Discount**
- **Discount type**
- **Reimburse**
- **Start Date**
- **End Date**



Additional Actions

To view all promo groups in the category, click this category.

To view all promotions in the promo group, click this promo group.

To view the active promotions only, click **Show Active Only**.

To edit the promotion, in the list of promotions, click the **Edit Promo** button at the right of the promotion.

For more information on additional report features, see Reports.

Promotions Acceptance Report

This section describes the specifics of accessing and interpreting the Promotions Acceptance report.

Opening the Report

You can find the report at **Reports** > **PB** > **Promotions** > **Promotions Acceptance**. For more information, see Viewing Reports.

Viewing the Report

The Promotions Acceptance report provides information on stations active promotions.

Interpreting the Report Data

The Report contains of the following information:

- Promotion name
- Promotion type
- Promotion condition
- Promotion activity time frame

To edit a promotion, click it.

For more information on additional report features, see Reports.

Promotions by Tag Report

This section describes the specifics of accessing and interpreting the Promotions by Tag report.

You can perform the following actions with the report:

- Open the report with default or custom filters.
- View the report's data.
- Filter and sort the report's data.
- Additional actions.

Opening the Promotions by Tag Report

You can open report in either of the following ways:

- Go to **Reports** > **Store** > **Sales** > **Promotions by Tag**.
- Go to **Reports** > **Price Book** > **Promotions** > **Promotions by Tag**.

The Promotions by Tag report can be opened at any level: account, company, division, or station. For more information, see Viewing Reports.

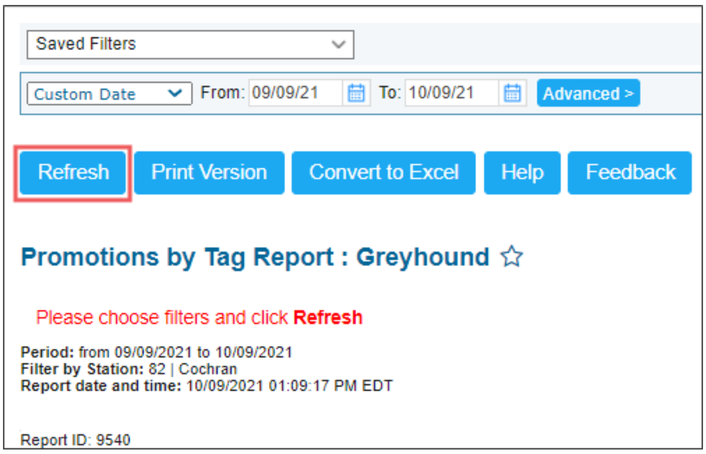
Once the report opens, it doesn't display any data as no report filters are applied.

To view the report data, do either of the following:

- Open the report with default filters.
- Open the report with custom filters.

Opening the Report with Default Filters

To generate the report with the default filters, click **Refresh**.



The following default filters will be applied to the report:

- **Period**: One month before the current date.

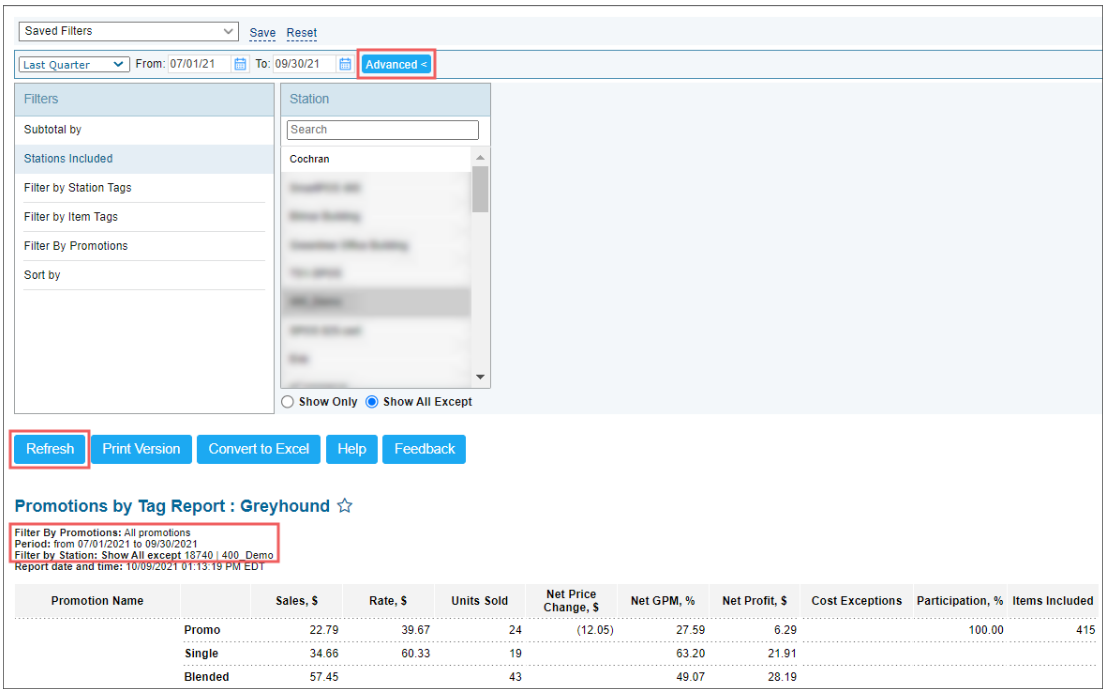
> ***For example***
> *If the current date is 31 January 2020, then the report default period starts on 31 December 2019 and ends on 31 January 2020.*

- **Filter by Promotions**: All promotions.

Opening the Report with Custom Filters

To generate the report with custom filters:

1. At the top right of the report, click **Advanced**.
2. Select the filters you need. For details, see Filtering and Sorting Report Data.
3. Click **Refresh**.



Promotions by Tag Report

The Promotions by Tag report provides advanced information on existing promotions and allows you to keep track of promoted items purchased at your business for a specific period of time.

> To view this report, set up a filter by stations or station tags, and filter the report data by specific promotions. You can further refine the report by using other filtering options.

The report contains the following information:

- **Promotion Name**: The promotion name. For each promotion, the data is presented in the following formats:
  - **Promo**: Projected amount in which 100% of items included in this promotion are calculated as sold at the promotion price.
  - **Single**: The information about items included into the promotion, but sold separately, not within this promotion.
  - **Blended**: Actual amount of items sold at both promotion and regular / other price. Some of items participating in promotion can be sold at a regular price as well.
- **Sales, $**
- **Rate, %**: The percentage of promo and single sales to total sales. The Rate, % value is rounded to two decimal places and calculated by the following formulas:
  - *Rate (promo sales), % = Promo Sales, $ / Total Sales, $ * 100%*
  - *Rate (single sales), % = Single Sales, $ / Total Sales, $ * 100%*
- **Units Sold**: Number of units sold during the promotion active period.

> The total for units sold for closed or inactive promotions includes units sold until the promotion ending date. You can check the promotion ending date in the **Promotion Setup** form > **Time Frame** section. For details, see Promotion Setup form.

- **Net Price Change, $**
- **Net GPM, %**
- **Net Profit, $**
- **Cost Exceptions**
- **Participation, %**
- **Items Included**

Promotions by Tag Report : Greyhound ☆

Filter By Promotions: Sobe Lifewater 20 oz $1.59, Path Water 20.3 oz 2/$5 Jan-Dec 2021, Path Water 25 oz 2/$5.50 Jan-Dec 2021
Period: from 01/01/2020 to 12/31/2020
Filter by Station: Show All except 18740 | 400_Demo
Report date and time: 10/09/2021 06:45:55 PM EDT

Promotion Name		Sales, $	Rate, $	Units Sold	Net Price Change, $	Net GPM, %	Net Profit, $	Cost Exceptions	Participation, %	Items Included
2149717 . Sobe Lifewater 20 oz $1.59	Promo	186.03	97.50	117	(35.10)	37.64	70.03		100.00	5
	Single	4.77	2.50	3		100.00	4.77			
	Blended	190.80		120		39.20	74.80			
Total	Promo	186.03	98	117	(35.10)	37.64	70.03	0		
	Single	4.77	3	3		100.00	4.77			
	Blended	190.80		120		39.20	74.80			

Report ID: 9540

Filtering the Promotions by Tag Report

To get the exact information you need, you can apply filters to the report. To set up a filter, select one or more filtering options. Once the filter is set up, at the bottom of the filter section, click the **Refresh** button to display the report data by the filter criteria.

The report provides the following filtering and sorting options:

- **Date**: Specify the period you are interested in manually using the calendar or use one of the available filtering options, and then click **Refresh** There are the following filtering periods available:
  - **Yesterday**
  - **Current Month**
  - **Current Quarter**
  - **Current Year**
  - **Last Month**
  - **Last Quarter**
  - **Last Year**
  - **Last 12 Months**
- **advanced**: Click the **advanced** button, select one several filtering options you want, and then click[**Refresh**. There are the following advanced filtering options available:
  - **Subtotal By**. Select one of the following subtotal options, if you want to break-down the report results further:
    - **Common (Station)**
    - **Station Tags**
    - **Item Tags**
  - **Station Included**: Select the stations you want to view the report for.
  - **Filter by Station Tags**: Use this option to filter the report data by tags assigned to stations. The generated report will contain data only for those stations to which the selected tags are assigned.
    To select tags by which the report data must be filtered, expand the tags tree and select the check boxes next to the necessary tags. You can filter the report data by root tags and tags of the lower level in the tags hierarchy. You can also create a combined filter by selecting different root and child tags.
  - **Filter by Item Tags**: Use this option to filter the report data by tags assigned to items. The generated report will contain data only for those items to which the selected tags are assigned. To select tags by which the report data must be filtered, expand the tags tree and select the check boxes next to the necessary tags. You can filter the report data by root tags and tags of

the lower level in the tags hierarchy. You can also create a combined filter by selecting different root and child tags.

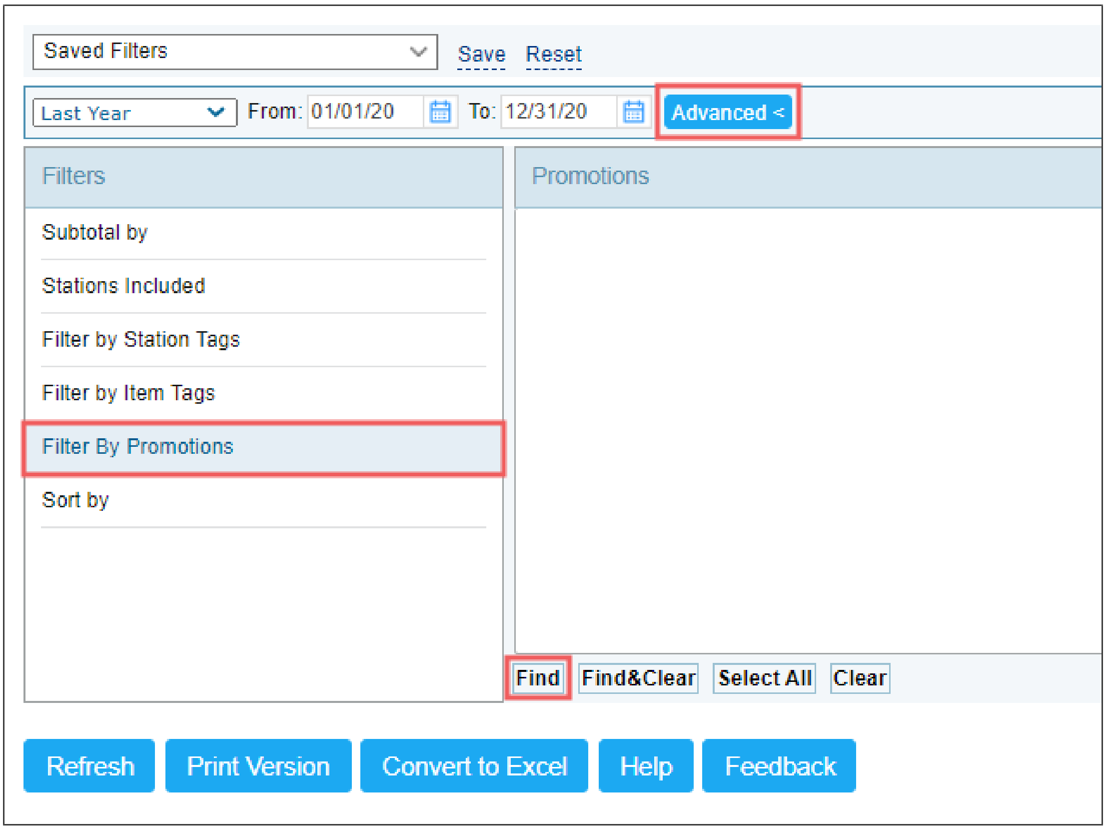
- **Filter By Promotions**: Select the promotions you want. For more information, see Filtering the Report's Data by Promotions.
- **Sort by**. Select the order of the report columns you want. Select the **Ascending** or **Descending** option for the corresponding type of filtering.

> Press **CTRL** to select several items at a time.
> Select the **Show Only** option to view only the information for the selected items, and **Show All Except** to view the information for all the items except the selected ones.

Filtering the Report's Data by Promotions

To filter the report's data by promotions:

1. Click **Advanced** > **Filter By Promotions**.
2. In the **Promotions** filter, click **Find**.

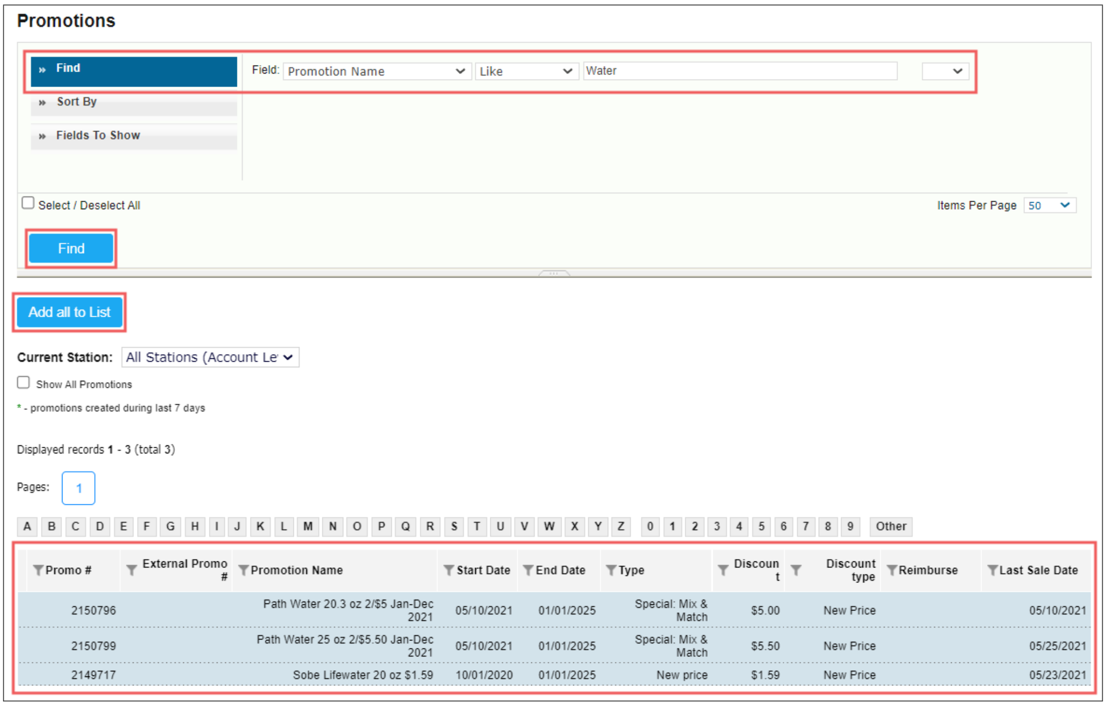


Result: The Promotions list opens.

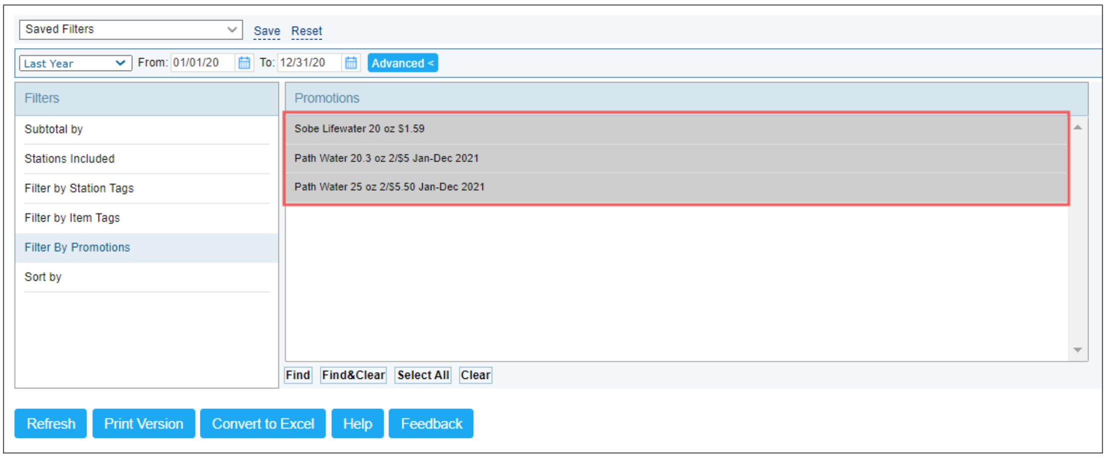
3. In the **Promotions** list:
   a. Make sure the **Find** option is selected.

b. In the **Field** list, select the promotion parameter by which you want to find your promotions in the list.
c. Select the search operator.
d. Enter the search value, if any.
e. Click **Find**.

   Result: All promotions that match the search criteria are displayed in the list.
f. Select the promotions you want to add to the report's filter.
g. Click the **Add all to List** button.



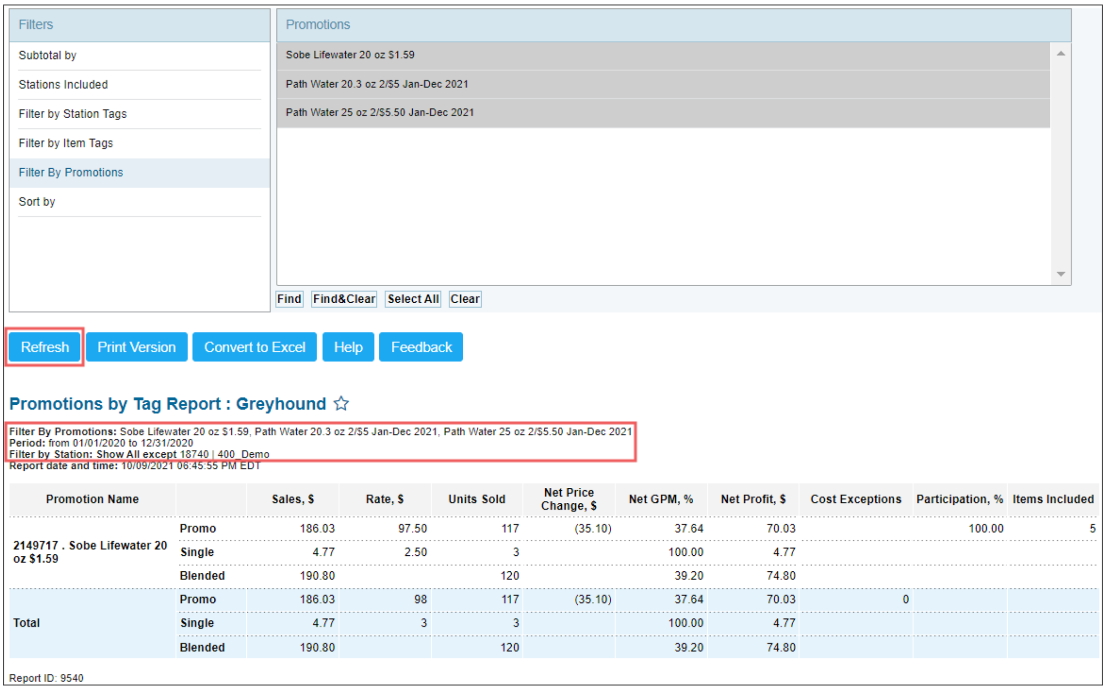
Result: All promotions found in the **Promotions** list are added to the **Filter By Promotions** filter to the report.



4. In the **Promotions by Tag** report:

a. In the **Filter By Promotion** field, select the promotions by which you want to filter the report's data.
b. Select other filters, if needed.
c. Click **Refresh**.

Result: The report's data is filtered in accordance with the specified filtering criteria.



Additional Actions

You can perform the following activities with the report:

- To view **Item Sales by Promotion** report, click **Promo** for the promotion in which you are interested.
- To view the **Sales by Items Included in Promotion** report, click **Blended** for the promotion in which you are interested.
- To view the **Net Price Change** report, click the **Net Price Change** column for the promotion in which you are interested.
- To view the **Participation** report, click the **Participation** column for the promotion in which you are interested.
- To view the **Promotion Items List** report, click the **Items Included** column for the promotion in which you are interested.

For more information on additional report features, see Reports.

Updates Manager

The Updates Manager tool allows users with different roles to perform the following operations:

- Users with the Head Office role: to review and send to the locations the items and/or promotions updates.
- Users with the Location role: to review and accept or reject the items and/or promotions updates received from the user with the Head Office role.

The Updates Manager tool consists of the following reports used by users with different roles:

- Outgoing report: for the users with the Head Office role.
- Incoming report: for the users with the Location role.

Outgoing

This section consists of the following subsections:

- About Outgoing Report
- Outgoing Report Interface
- Sending Updates to Distribution Channels

ABOUT OUTGOING REPORT

The Outgoing report is available for the users with the Head Office role only.

The Outgoing report is used to perform the following operations:

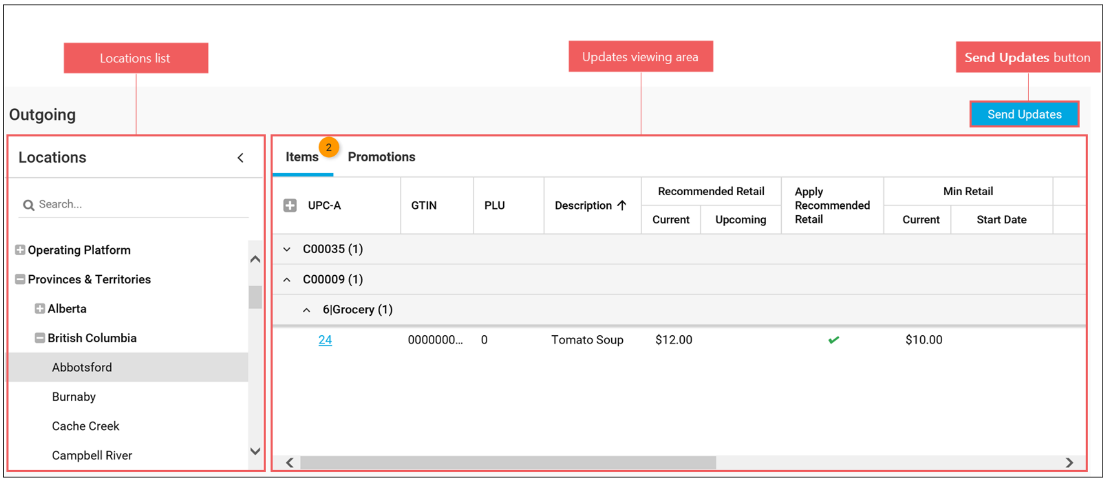
- Review updates before sending them to the locations.
- Send updates to the locations.

OUTGOING REPORT INTERFACE

The outgoing report interface consists of the following three elements:

- **Locations List**, where you can select the location with updated data. For details, see Locations List.
- **Updates Viewing Area**, where you can view updates for the selected location. For details, see Updates Viewing Area.

- **Send Updates** button, which is used for sending updates for the selected location.

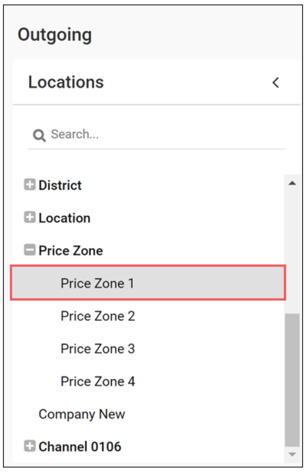


Locations List

The Locations list contains all locations configured for your Head Office account.

SELECTING LOCATION WITH UPDATED DATA

To select the location with updated data, expand corresponding section. Use the **Search** field, if needed.

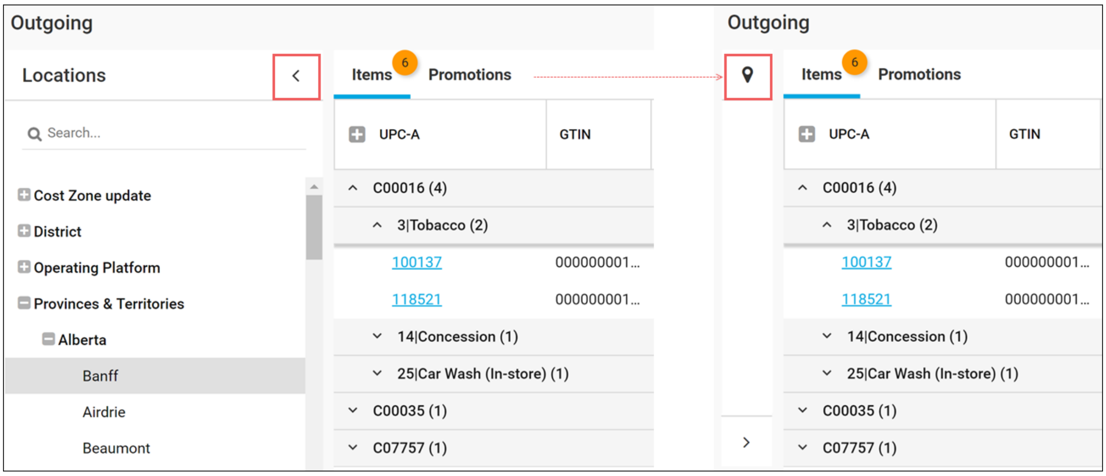


HIDING AND EXPANDING LOCATIONS LIST

You can hide the Locations list for more convenient viewing the location updates in the updates viewing area.

You can also expand the hidden Locations list, to select other location with the updated data.

To hide the **Locations** list, click **>**. To expand the hidden **Locations** list, click the **Locations** sign.



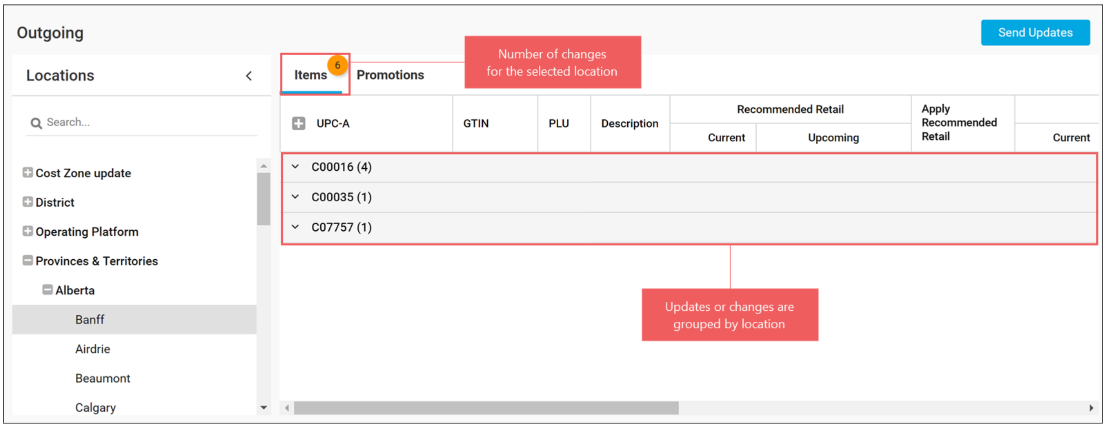
Updates Viewing Area

The Updates Viewing Area consists of the following two lists:

- Items list
- Promotions list

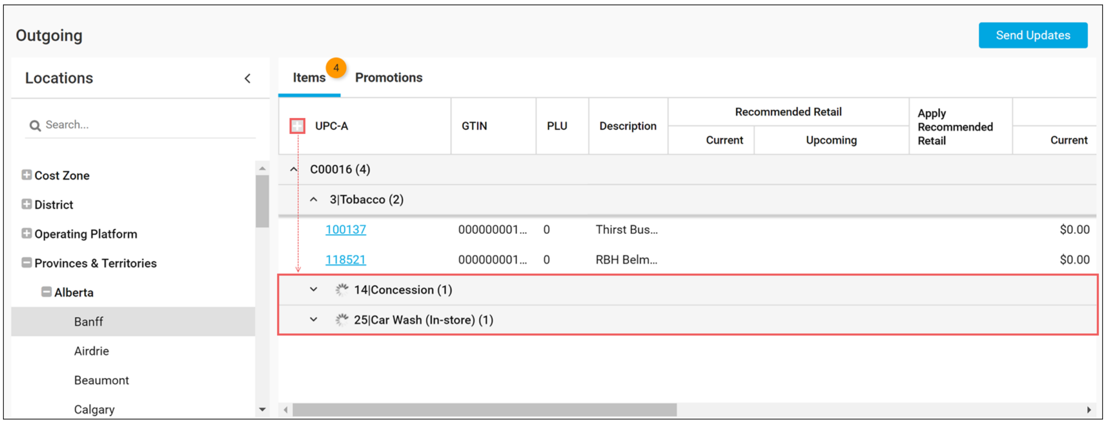
The number of applied changes, if any, is displayed on the right of each list name in orange ellipse.

Each list displays changed items or promotions grouped by stations.



By default, changes and updates grouped by locations are displayed as collapsed nodes. To view detailed information about changes and updates, click the arrow icon next to the necessary location. Alternatively, you can expand the whole list of changes at once. To do this, click the plus icon next to the

UPC-A field.



SENDING UPDATES TO LOCATIONS

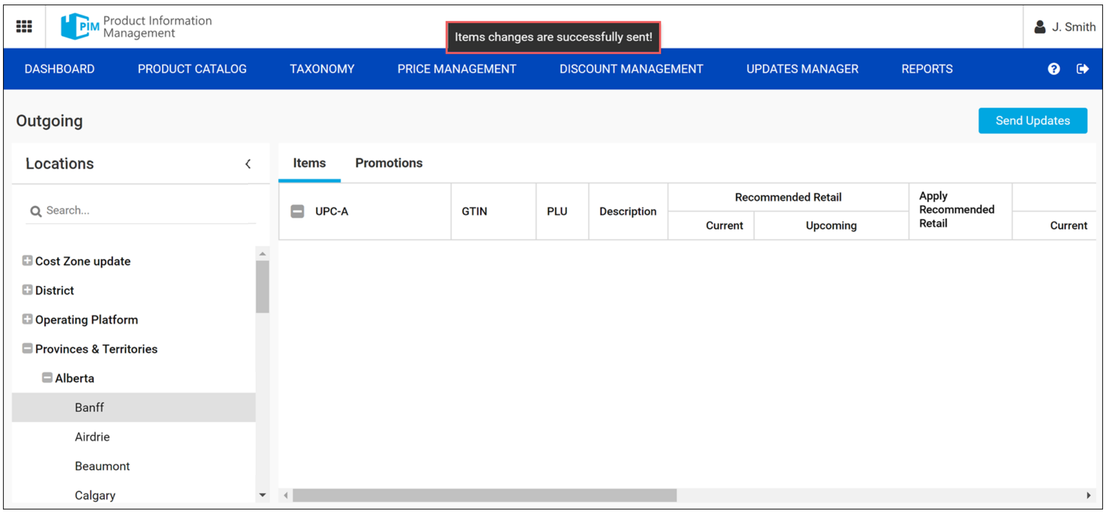
To send updates made at locations, follow the steps:

1. Go to **Updates Manager** > **Outgoing**.
2. In the **Locations** list, select the location for which you need to send updates. Use the **Search** field if needed.
3. In the **Updates Viewing Area** > **Items** or **Promotions** list, review the updates.
4. At the top right of the **Outgoing** page, click the **Send Updates** button.

   All items and promotions updates are sent to the selected location together after the sending updates action is confirmed. Thus, before clicking the **Send Updates** button, make sure you have reviewed updates for both items and promotions.

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

   Result: All items and promotions updates are sent to the selected location.



Incoming

This section consists of the following subsections:

- About Incoming Report
- Incoming Report Interface
- Accepting or Rejecting Changes

ABOUT INCOMING REPORT

The Incoming report is available for the users with the Location role and access to review updates and reject or accept them.

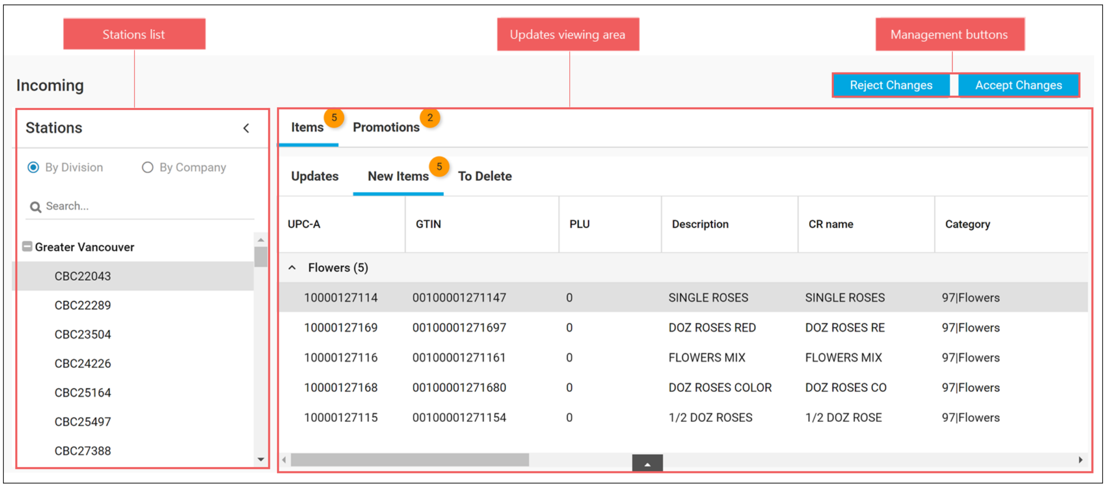
The Incoming report is used to perform the following operations:

- Review items and promotions changes came from the head office for the selected station.
- Reject or accept items and promotions changes for the selected station.

INCOMING REPORT INTERFACE

The Incoming report interface consists of the following elements:

- **Stations List**, where you can select a station to review its updates. For details, see Stations List.
- **Updates Viewing Area**, where you can view updates for the selected station. For details, see Updates Viewing Area.
- **Managing** buttons, which are used for rejecting or accepting updates for the selected station. For details, see Managing Buttons.

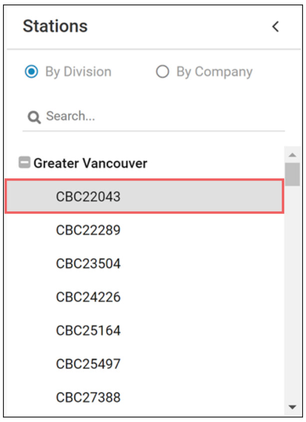


Stations List

The Stations list contains all stations available for the current user.

SELECTING STATION WITH UPDATED DATA

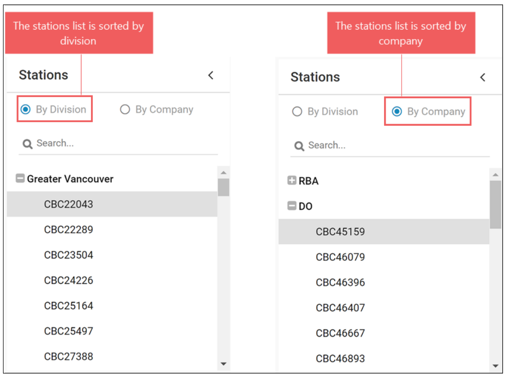
To select the station with updated data, expand corresponding section. Use the **Search** field, if needed.



SORTING STATIONS LIST

You can sort the Stations list in the following ways:

- By division: Select **By Division**
- By company: Select **By Company**

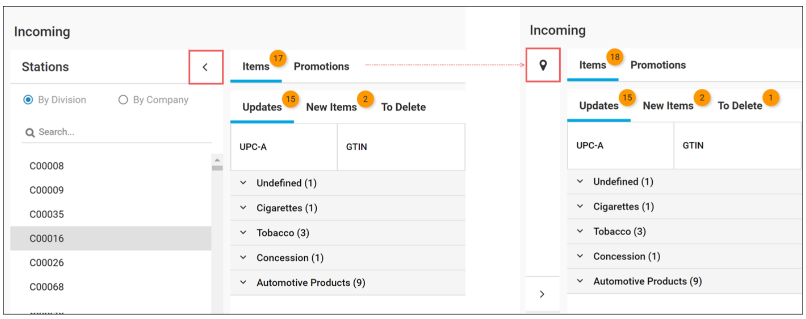


HIDING AND EXPANDING STATIONS LIST

You can hide the Stations list for more convenient viewing the station updates in the updates viewing area.

You can also expand the hidden Stations list, to select other station with the updated data.

To hide the **Stations** list, click **>**. To expand the hidden **Stations** list, click the **Stations** sign.

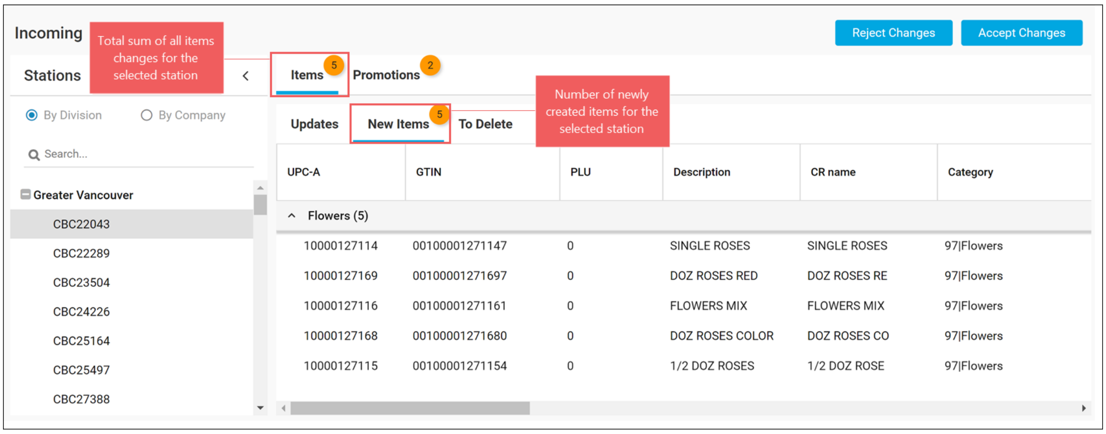


Updates Viewing Area

The Updates Viewing Area consists of the following two lists:

- **Items** list, which consists of the following three sections:
    - **Updates**: Contains updated items
    - **New Items**: Contains newly created items
    - **To Delete**: Contains deleted items
- **Promotions** list, which consists of the following three sections:
    - **New Promotions**: Contains newly created promotions
    - **Updates**: Contains updated promotions
    - **To Delete**: Contains deleted promotions

The number of applied changes, if any, is displayed on the right of each section in the list. Total sum of all changes in the Items or Promotions list is displayed on the right of the list name in orange ellipse.



Managing Buttons

After reviewing the items and promotions changes, you can perform one of the following actions:

- Reject all items and promotions changes - click the **Reject Changes** button.
- Accept all items and promotions changes - click the **Accept Changes** button.

> All items and promotions updates are rejected or accepted together after the corresponding action is confirmed. Thus, before clicking the **Reject Changes** or **Accept Changes** button, make sure you have reviewed updates for both items and promotions.

ACCEPTING OR REJECTING CHANGES

To accept or reject changes made at the location for the items and/or promotions, follow the steps:

1. Go to **Updates Manager** > **Incoming**.
2. In the **Stations** list, select the station, for which you need to accept or reject changes. Use the **Search** field, if needed.
3. In the **Updates Viewing Area** > **Items** or **Promotions** list, review the changes.
4. At the top right of the **Incoming** page, click the **Accept** or **Reject** button.

   All items and promotions updates are rejected or accepted together after the corresponding action is confirmed. Thus, before clicking the **Reject Changes** or **Accept Changes** button, make sure you have reviewed updates for both items and promotions.

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

   Result: All items and promotions updates are accepted or rejected for the selected station.

PIM Reports

To let branch office managers quickly get information about changes introduced by the head office manager, PIM offers the following reports:

- Cost Changes Report: Lists changes made to item cost both on the global level and for each location separately
- Retail Changes Report: Lists changes made to item retail both on the global level and for each location separately
- Upcoming Recommended Retail Changes Report: Lists all pending price changes for items sent from the head office to branch offices.
- Upcoming Delisted Items Report: Lists all items that are to be deactivated in future.

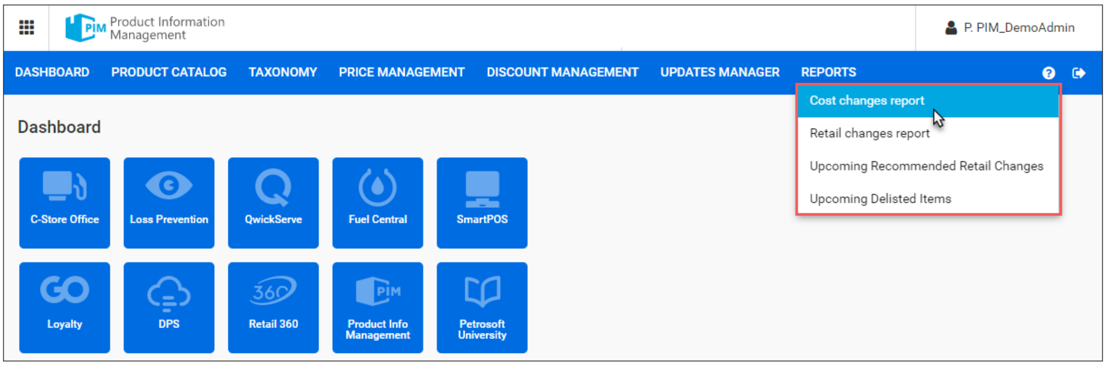
Cost Changes Report

The Cost Changes report displays the detailed information about the changes made to item cost both on the global level and for each location separately.

ACCESSING REPORT

To access the Cost Changes Report:

1. Go to **Reports** > **Cost changes report**.

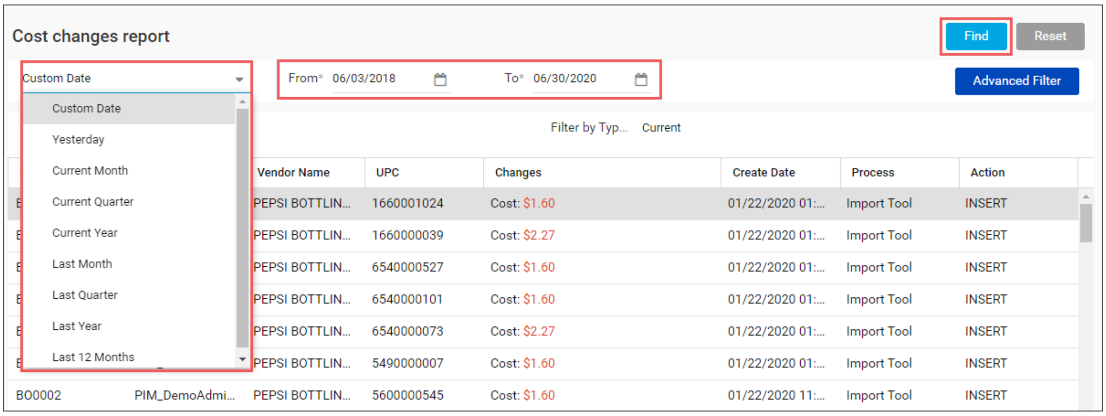


VIEWING REPORT

When you access the Cost changes report, PIM does not display any data. To run the report, follow the steps:

1. In the **Custom Date** list, select the period for which report data must be displayed. You can select a predefined period or specify a custom period. To do this, select **Custom Date** and define the start and end dates of the custom period using the **To** and **From** fields.
2. At the top right corner of the report form, click the **Find** button.

Result: The report data for the selected period will be displayed.



The Cost changes report displays the following data for each cost change operation:

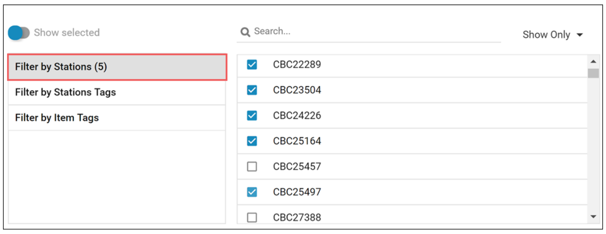
- **Location**: The name of the location where the cost was changed.
- **User**: The name of the user who performed a cost change.
- **Vendor Name**: The name of the vendor of the item for which the cost was changed.
- **UPC**: The UPC code of the item for which the cost was changed.
- **Changes**: A new cost value.
- **Create Date**: The date of the cost change.
- **Process**: The name of the tool where the cost change was performed.
- **Action**: The name of the system action triggered the cost change.

FILTERING REPORT DATA

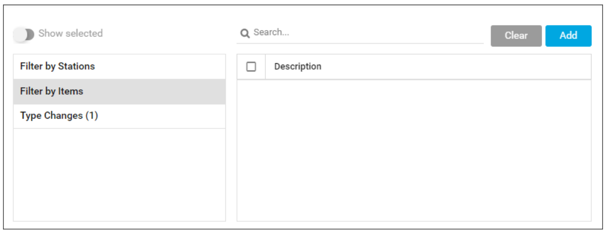
By default, the Cost changes report displays all items where the cost was changed within the specified period. If necessary, you can use the filter to display a specific breakdown of data, for example, items to be deactivated at a specific location.

To filter the report data, follow the steps:

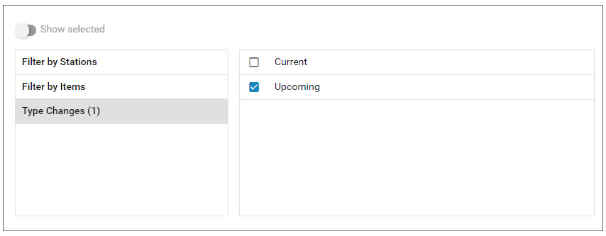
1. In the **Custom Date** list, select the necessary period for which the report must be run.
2. At the top right corner of the report form, click the **Advanced Filter** button.
3. In the left pane, set up one or several criteria by which you want to filter the report data:
    - **Filter by Stations**: Select this option to display report data for specific stations only. In the pane on the right, select check boxes next to stations whose data you want to display.
      If the number of stations is great, you can switch between modes of stations selection. At the top right corner of the stations list, select **Show Only** to display data only for the selected stations or **Show All Except** to display data for all stations except the selected ones.



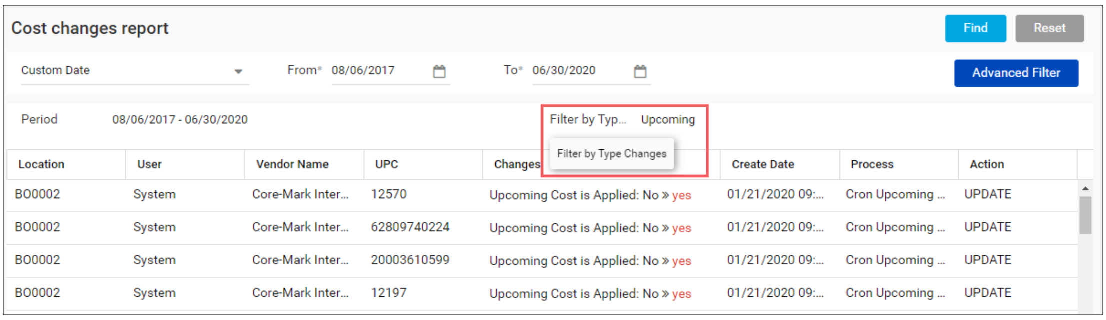
- **Filter by Items**: Select this option to display report data for the specific items. Find the items you want to view the report for and add them to the list on the right.



- **Type Changes**: Select this option to filter the report data by the changes type. Select any of the following changes type:
  - **Current**
  - **Upcoming**



4. At the top right corner of the report form, click the **Find** button.
   Result: The report data is filtered by the specified conditions. The filter conditions are displayed at the top of the items list.



To discard the filter criteria, at the top right corner of the report form, click the **Reset** button. After that, you can run the report again.

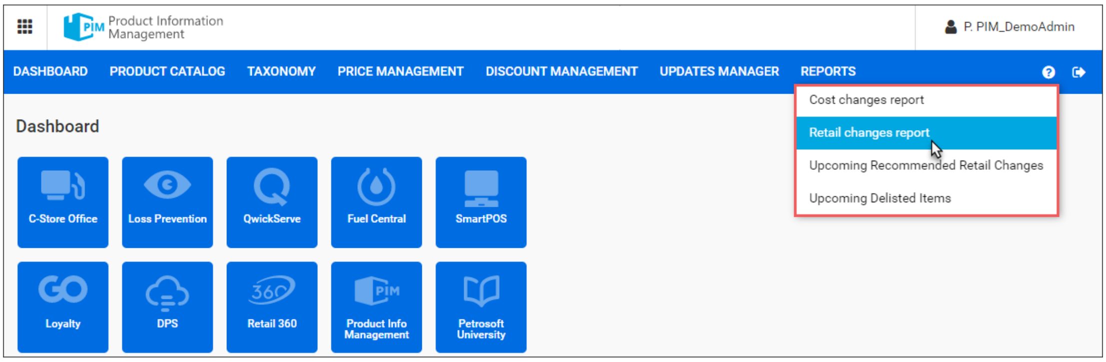
Retail Changes Report

The Retail Changes report displays the detailed information about the changes made to item retail both on the global level and for each location separately.

ACCESSING REPORT

To access the Retail Changes Report:

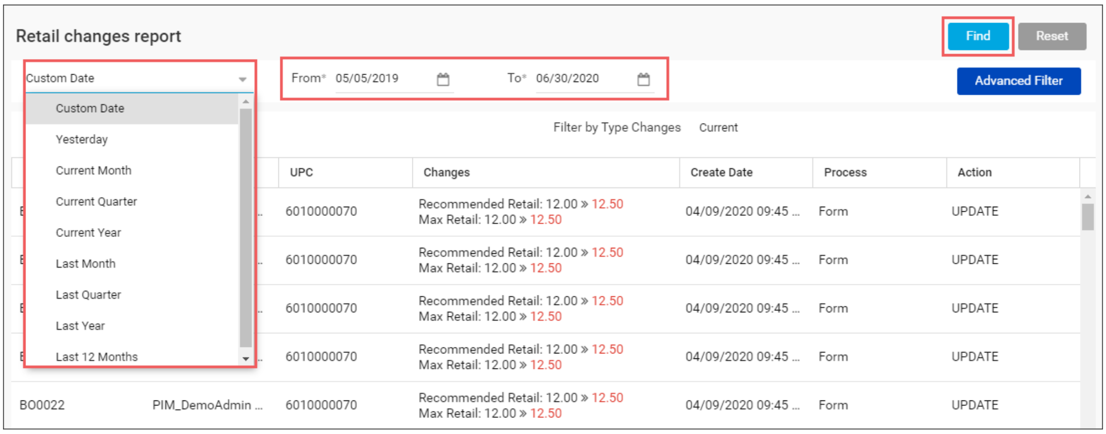
1. Go to **Reports** > **Retail changes report**.



VIEWING REPORT

When you access the Retail changes report, PIM does not display any data. To run the report, follow the steps:

1. In the **Custom Date** list, select the period for which report data must be displayed. You can select a predefined period or specify a custom period. To do this, select **Custom Date** and define the start and end dates of the custom period using the **To** and **From** fields.
2. At the top right corner of the report form, click the **Find** button.
   Result: The report data for the selected period will be displayed.



The Retail changes report displays the following data for each cost change operation:

- **Location**: The name of the location where the cost was changed.
- **User**: The name of the user who performed a cost change.
- **UPC**: The UPC code of the item for which the cost was changed.
- **Changes**: A new cost value.
- **Create Date**: The date of the cost change.
- **Process**: The name of the tool where the cost change was performed.
- **Action**: The name of the system action triggered the cost change.

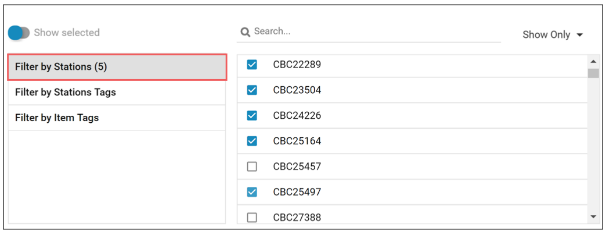
FILTERING REPORT DATA

By default, the Retail changes report displays all items where the cost was changed within the specified period. If necessary, you can use the filter to display a specific breakdown of data, for example, items to be deactivated at a specific location.

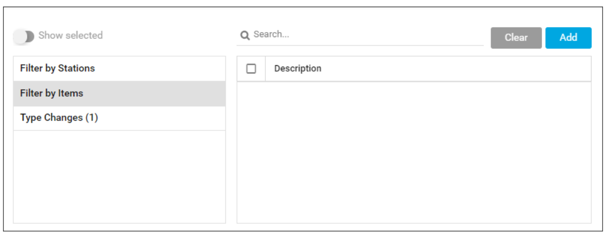
To filter the report data, follow the steps:

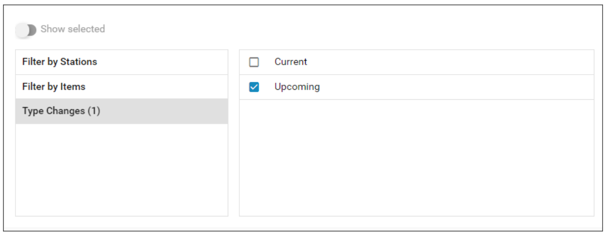
1. In the **Custom Date** list, select the necessary period for which the report must be run.
2. At the top right corner of the report form, click the **Advanced Filter** button.
3. In the left pane, set up one or several criteria by which you want to filter the report data:

   - **Filter by Stations**: Select this option to display report data for specific stations only. In the pane on the right, select check boxes next to stations whose data you want to display.
     If the number of stations is great, you can switch between modes of stations selection. At the top right corner of the stations list, select **Show Only** to display data only for the selected stations or **Show All Except** to display data for all stations except the selected ones.

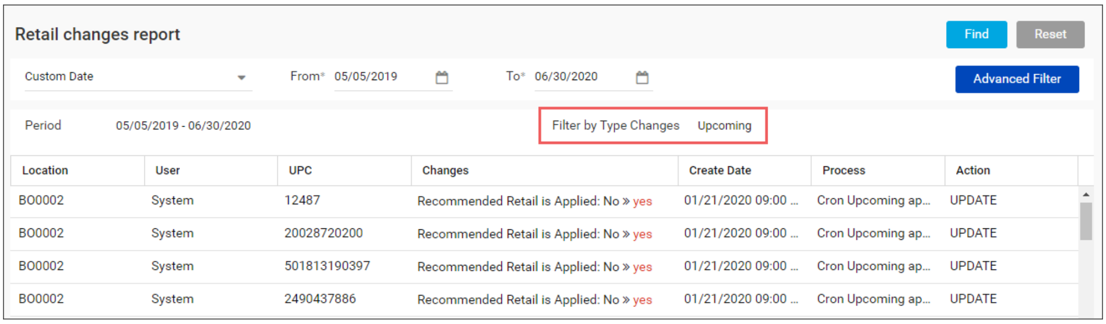


   - **Filter by Items**: Select this option to display report data for the specific items. Find the items you want to view the report for and add them to the list on the right.



- **Type Changes**: Select this option to filter the report data by the changes type. Select any of the following changes type:
    - **Current**
    - **Upcoming**
- 

4. At the top right corner of the report form, click the **Find** button.
   Result: The report data is filtered by the specified conditions. The filter conditions are displayed at the top of the items list.



To discard the filter criteria, at the top right corner of the report form, click the **Reset** button. After that, you can run the report again.

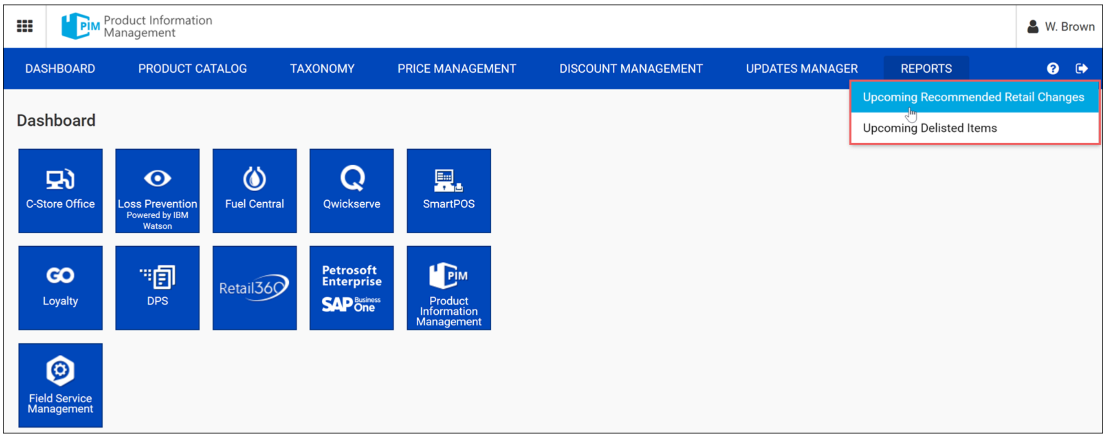
Upcoming Recommended Retail Changes Report

The Upcoming Recommended Retail Changes Report is intended for users with the Branch Office role. The report lists all future price changes recommended by the head office manager in PIM and sent to branch offices for review and approval.

ACCESSING REPORT

To access the Upcoming Recommended Retail Changes Report:

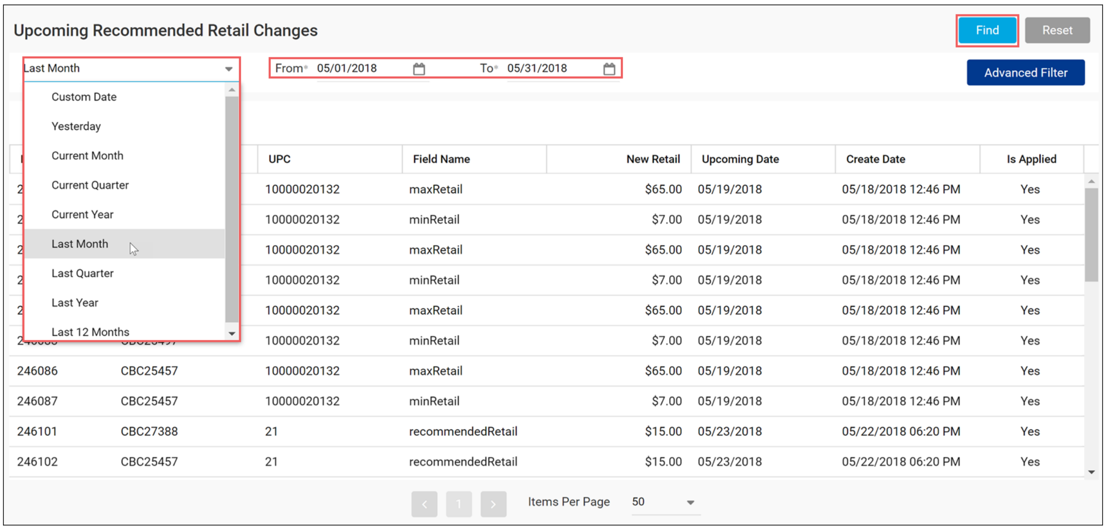
1. Go to **Reports** > **Upcoming Recommended Retail Changes**.



VIEWING REPORT

When you access the Upcoming Recommended Retail Changes Report, PIM does not display any data. To run the report, follow the steps:

1. In the **Custom Date** list, select the period for which report data must be displayed. You can select a predefined period or specify a custom period. To do this, select **Custom Date** and define the start and end dates of the custom period using the **To** and **From** fields.
2. At the top right corner of the report form, click the **Find** button.
   Result: The report data for the selected period will be displayed.



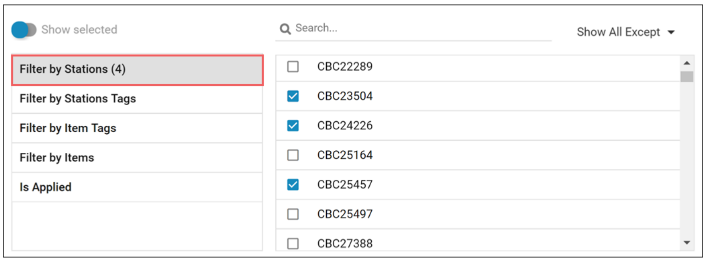
FILTERING REPORT DATA

By default, the Upcoming Recommended Retail Changes Report displays all upcoming price changes for all locations and regions for which these changes are suggested. If necessary, you can use the filter to display a specific breakdown of data, for example, changes suggested for a certain location or specific items.

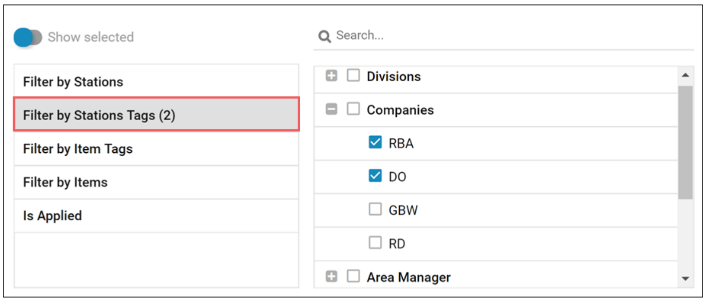
To filter the report data, follow the steps:

1. In the **Custom Date** list, select the necessary period for which the report must be run.
2. At the top right corner of the report form, click the **Advanced Filter** button.
3. In the left pane, set up one or several criteria by which you want to filter the report data:

   - **Filter by Station**: select this option to display report data for specific stations only. In the pane on the right, select check boxes next to stations whose data you want to display.
     If the number of stations is great, you can switch between modes of stations selection. At the top right corner of the stations list, select **Show Only** to display data only for the selected stations or **Show All Except** to display data for all stations except the selected ones.

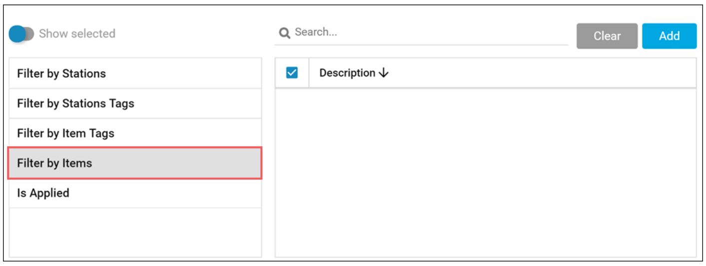


   - **Filter by Stations Tag**: select this option to display report data for stations to which a specific tag is assigned. In the pane on the right, select check boxes next to the necessary tags.

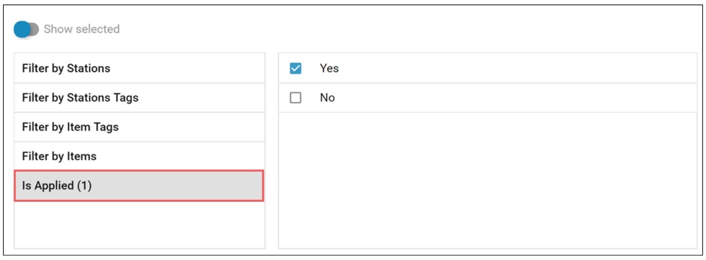


   - **Filter by Item Tag**: select this option to display report data for items to which a specific tag is assigned. In the panes on the right, select the necessary taxonomy object and tag.

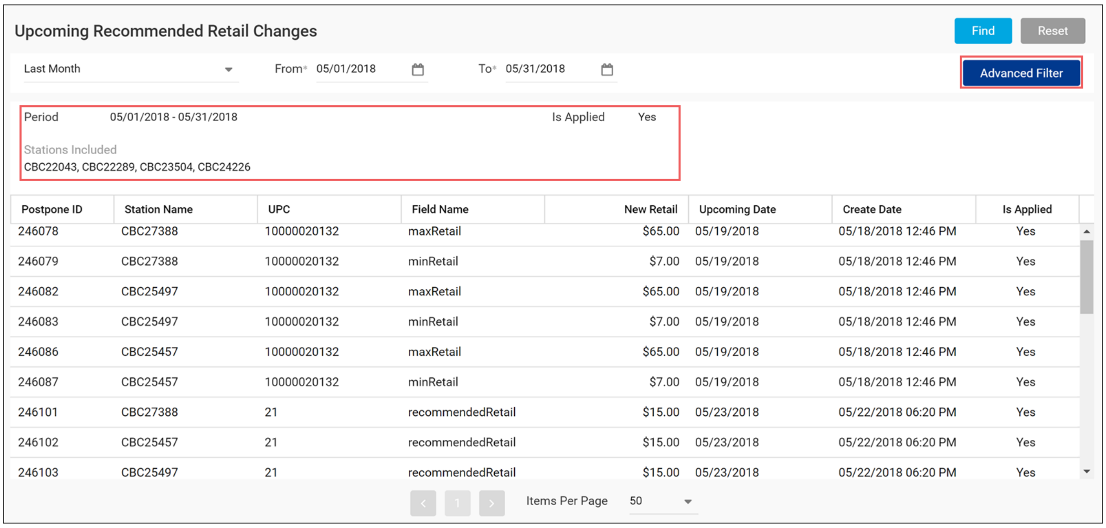
   - **Filter by Item**: select this option to display report data for items matching a specific value. In the pane on the right, select the necessary criterion.



- **Is Applied**: select this option to filter only those price changes that are applied or not applied at present. In the pane on the right, select the check box next to the necessary condition.



4. At the top right corner of the report form, click the **Find** button.
   Result: The report data is filtered by the specified conditions. The filter conditions are displayed at the top of the price changes list.



Postpone ID	Station Name	UPC	Field Name	New Retail	Upcoming Date	Create Date	Is Applied
246078	CBC27388	10000020132	maxRetail	$65.00	05/19/2018	05/18/2018 12:46 PM	Yes
246079	CBC27388	10000020132	minRetail	$7.00	05/19/2018	05/18/2018 12:46 PM	Yes
246082	CBC25497	10000020132	maxRetail	$65.00	05/19/2018	05/18/2018 12:46 PM	Yes
246083	CBC25497	10000020132	minRetail	$7.00	05/19/2018	05/18/2018 12:46 PM	Yes
246086	CBC25457	10000020132	maxRetail	$65.00	05/19/2018	05/18/2018 12:46 PM	Yes
246087	CBC25457	10000020132	minRetail	$7.00	05/19/2018	05/18/2018 12:46 PM	Yes
246101	CBC27388	21	recommendedRetail	$15.00	05/23/2018	05/22/2018 06:20 PM	Yes
246102	CBC25457	21	recommendedRetail	$15.00	05/23/2018	05/22/2018 06:20 PM	Yes
246103	CBC25497	21	recommendedRetail	$15.00	05/23/2018	05/22/2018 06:20 PM	Yes

To discard the filter criteria, at the top right corner of the report form, click the **Reset** button. After that, you can run the report again.

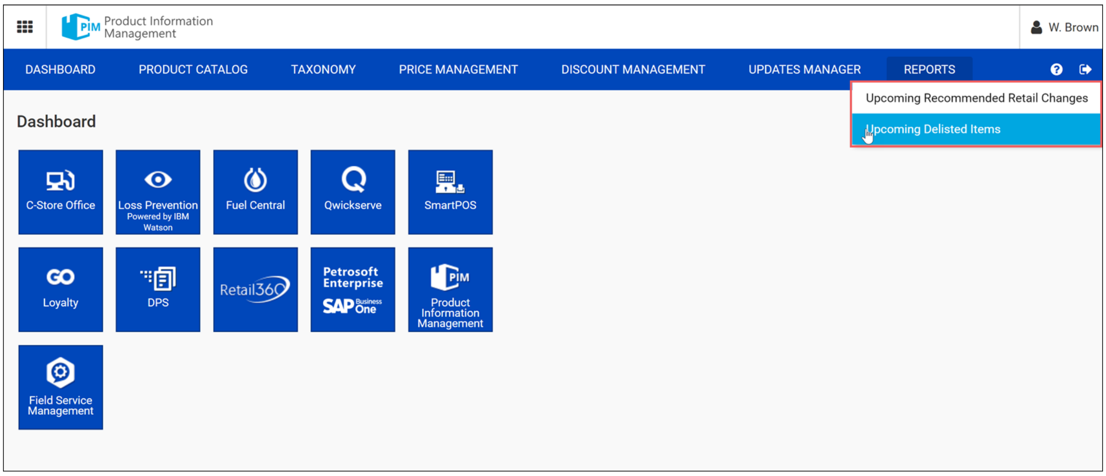
Upcoming Delisted Items Report

The Upcoming Delisted Items Report is intended for users with the Head Office and Branch Office roles. The report lists all items that are to be deactivated in future.

ACCESSING REPORT

To access the Upcoming Delisted Items Report:

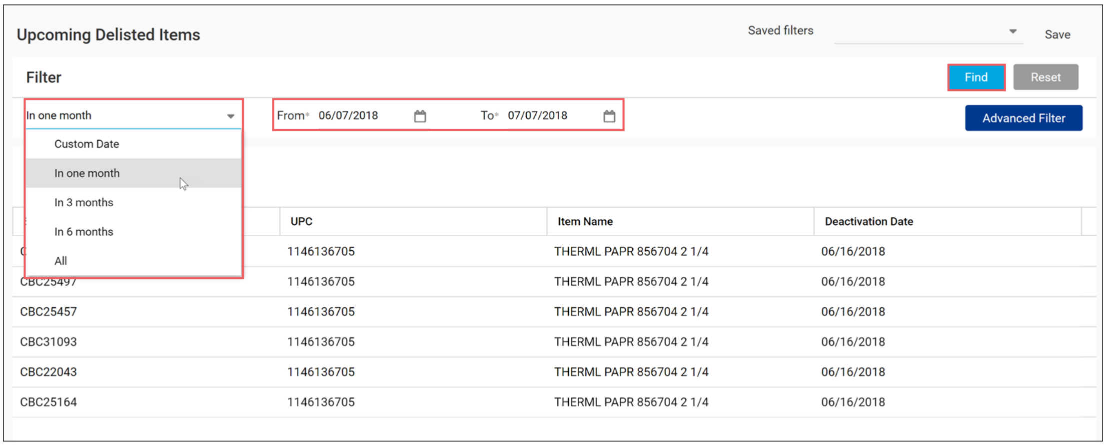
1. Go to **Reports** > **Upcoming Delisted Items**.



VIEWING REPORT

When you access the Upcoming Delisted Items Report, PIM does not display any data. To run the report, follow the steps:

1. In the **Custom Date** list, select the period for which report data must be displayed. You can select a predefined period or specify a custom period. To do this, select **Custom Date** and define the start and end dates of the custom period using the **To** and **From** fields.
2. At the top right corner of the report form, click the **Find** button.
   Result: The report data for the selected period will be displayed.



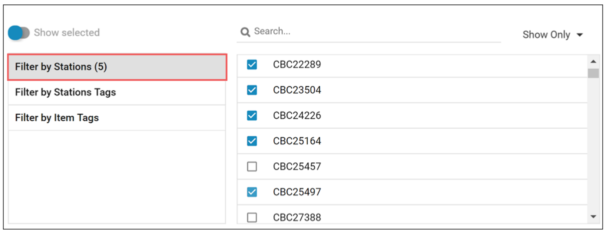
FILTERING REPORT DATA

By default, the Upcoming Delisted Items Report displays all items to be deactivated. If necessary, you can use the filter to display a specific breakdown of data, for example, items to be deactivated at a specific location.

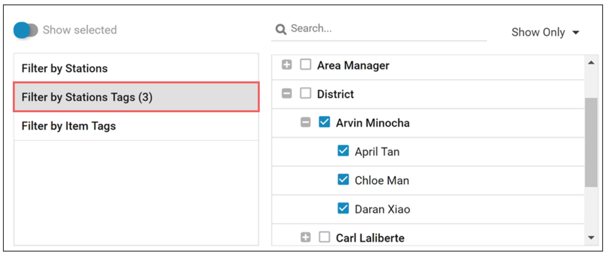
To filter the report data, follow the steps:

1. In the **Custom Date** list, select the necessary period for which the report must be run.
2. At the top right corner of the report form, click the **Advanced Filter** button.
3. In the left pane, set up one or several criteria by which you want to filter the report data:

   - **Filter by Station**: select this option to display report data for specific stations only. In the pane on the right, select check boxes next to stations whose data you want to display.
     If the number of stations is great, you can switch between modes of stations selection. At the top right corner of the stations list, select **Show Only** to display data only for the selected stations or **Show All Except** to display data for all stations except the selected ones.

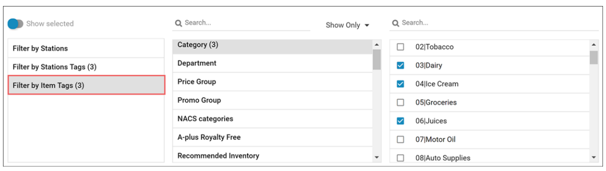


   - **Filter by Stations Tag**: select this option to display report data for stations to which a specific tag is assigned. In the pane on the right, select check boxes next to the necessary tags.



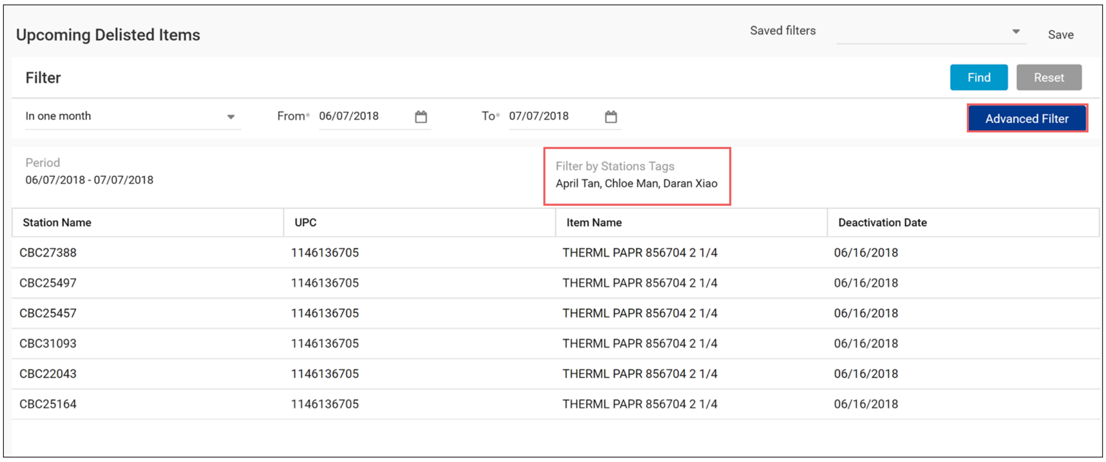
   - **Filter by Item Tag**: select this option to display report data for items to which a specific tag is assigned. In the panes on the right, select the necessary taxonomy object and tag.

   - **Filter by Item**: select this option to display report data for items matching a specific value. In the panes on the right, select the necessary criteria.



4. At the top right corner of the report form, click the **Find** button.
   Result: The report data is filtered by the specified conditions. The filter conditions are displayed at

the top of the items list.



You can save the configured filter to use it in future. To do this, set up the necessary filter criteria and click the **Save** button at the top right corner of the report form. In the displayed window, enter the filter name and click **OK**. The saved filter will become available in the **Saved filters** list.

To discard the filter criteria, at the top right corner of the report form, click the **Reset** button. After that, you can run the report again.

Annex I. Compatible Cash Registers

PIM promotions are supported by most cash registers with some limitations listed in the table below:

- Limitations for Regular Promotions
- Limitations for Combo Promotions

To specify if a parameter is supported by a certain cash register type and for a certain promotion type, the following icons are used in the table:

Icon	Description
+	Parameter is supported.
–	Parameter is not supported.

Promotions and their parameters not listed in the tables are supported by cash registers without limitations.

Limitations for Regular Promotions

Regular Promotions: Parameters	Cash Registers										
	SmartPOS	Radiant	Passport	Ruby	Sapphire (Deal)	Sapphire (NAXML Deal)	Commander (NAXML Deal)	Nucleus	Conexxus	ITL v.1.4.5	Bulloch
All regular promotion types											
- External Promo #	–	+	–	–	–	–	–	–	–	–	–
- [[[Undefined variable MyVariables.Qwickserve]]] Description	–	–	–	–	–	–	–	–	–	–	–
- Departments Included	–	–	–	–	–	–	–	–	–	+	–

Regular Promotions: Parameters	Cash Registers										
	SmartPOS	Radiant	Passport	Ruby	Sapphire (Deal)	Sapphire (NAXML Deal)	Commander (NAXML Deal)	Nucleus	Conexxus	ITL v.1.4.5	Bulloch
- CRIND	–	–	–	–	–	–	–	–	–	–	–
Price Reduction	+	+	+	+	+	+	+	+	+	+	+
- Happy Hours	–	+	–	–	–	–	–	–	–	–	–
New Price	+	+	+	+	+	+	+	+	+	+	+
- Happy Hours	–	+	–	–	–	–	–	–	–	–	–
Price Modifier	+	+	+	+	+	+	+	+	+	+	+
Mix&Match	+	+	+	+	+	+	+	+	+	+	+
- New Price	+	+	+	+	+	+	+	+	+	–	+
- Amount	+	+	+	+	–*	+	+	+	+	+	–
- Percent	+	+	+	–	–*	+	+	+	+	+	–
- Happy Hours	+ (days only)	–	–	–	–	–	–	–	+	+	–
- and more	+ (% only)	–	–	–	–	–	–	–	–	–	–
- Taxation	–	–	–	–	–	+	+	–	–	–	–
- Priority	–	+	–	–	–	–	–	–	–	–	–
Price Each Mix	+	+	+	+	+	+	+	+	+	+ (2 groups only)	+
- New Price	+	+	+	+	+	+	+	+	+	–	+
- Amount	+	+	–!	+	–*	+	+	+	+	+	–

Regular Promotions: Parameters	Cash Registers										
	SmartPOS	Radiant	Passport	Ruby	Sapphire (Deal)	Sapphire (NAXML Deal)	Commander (NAXML Deal)	Nucleus	Conexxus	ITL v.1.4.5	Bulloch
- Percent	–	+	– !	–	– !	+	+	+	+	+	–
- Happy Hours	+ (days only)	–	–	–	–	+	+	–	+	+	–
- Taxation	–	+	–	–	–	+	–	–	–	–	–
- Priority	–	+	–	–	–	–	–	–	–	–	–
Link Saver	–	+	–	–	–	+	+	–	+	+ **	–
- New Price	–	+	–	–	–	+	+	–	+	–	–
- Amount	–	+	–	–	–	+	+	–	+	+	–
- Percent	–	+	–	–	–	+	+	–	+	+	–
- Happy Hours	–	–	–	–	–	+	+	–	–	+	–
- Taxation	–	+	–	–	–	–	–	–	–	–	–
- Priority	–	+	–	–	–	–	–	–	–	–	–
Coupon	–	+	–	–	–	–	–	–	–	–	–
Scan Data: Outlet Multi Pack (Mix&Match Amount only)											
- Amount	+	+	+	+	– *	+	+	+	+	–	–
- Happy Hours	+ (days only)	–	–	–	–	–	–	–	+	–	–
- Taxation	–	–	–	–	–	+	+	–	–	–	–
Scan Data: Account Funded (New Price)											
- Happy Hours	–	+	–	–	–	–	–	–	–	–	–

Regular Promotions: Parameters	Cash Registers										
	SmartPOS	Radiant	Passport	Ruby	Sapphire (Deal)	Sapphire (NAXML Deal)	Commander (NAXML Deal)	Nucleus	Conexxus	ITL v.1.4.5	Bulloch
Scan Data: Manufacturer Multi Pack (Mix&Match Amount only)											
- Amount	+	+	+	+	–*	+	+	+	+	–	–
- For every	+	+	+	+	+	+	+	–	–	–	+
- Maximum QTY	+	+	+	+	+	+	+	–	–	–	+
- Happy Hours	+ (days only)	–	–	–	–	–	–	–	+	–	–
- Taxation	–	–	–	–	–	+	+	–	–	–	–
Scan Data: Manufacturer Buy-Downs (Price Reduction)											
- Happy Hours	–	+	–	–	–	–	–	–	–	–	–
Scan Data Loyalty											
- Promotion itself	+	–	–	+ (Ruby2 only)	–	–	–	–	–	–	–
- and more	+	–	–	–	–	–	–	–	–	–	–

!: <ComboPrice> summarizes the retail price without recalculating it.
*: <price> summarizes the price without recalculating it.
**: The Link Saver promotion is supported by the ITL cash registers only for 2 promo groups: 1 trigger group and 1 discount group.

Limitations for Combo Promotions

Combo Promotions: Parameters	Cash Registers									
	SmartPOS	Radiant	Passport	Ruby	Sapphire (Deal)	Sapphire (NAXML Deal)	Commander (NAXML Deal)	Nucleus	Conexxus	Bulloch
- External Promo #	–	+	–	–	–	–	–	–	–	–
- CRIND	–	–	–	–	–	–	–	–	–	–
- Product Code	–	–	–	+	–	–	–	–	–	–
- Soft Key Number	–	–	–	+	+	+	+	–	–	–
- New Price	+	+	+	+	–	+	+	+	+	–
- Amount	+	+	– !	+	–	+	+	–	+	–
- Percent	+	+	– !	–	–	+	+	–	+	–
- Include Fuel	–	+	–	–	–	–	–	–	–	–
- Include Car Wash	–	+	–	–	–	–	–	–	–	–
- Taxation	–	+	–	–	–	–	–	–	–	–

! <ComboPrice> summarizes the retail price without recalculating it.