



**Assyst Point of Sale
Quick Maintenance
User Guide
Version 4.09**

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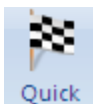
Introduction to Item Quick Maintenance

The Item Quick Maintenance may be used to create customized reporting about items. Once such a report is created, it may be displayed onscreen at which point the item settings reported may be adjusted directly.

Item Quick Maintenance is often used to save time where broader changes are required to a specific settings on item files by processing the changes very quickly and easily.

Quick Maintenance can be used to accomplish tasks such as:

- Moving products from one department or family to another when realigning category structures
- Changing prices on a large block of similar products such as all chocolate bars or Mennen deodorant sticks
- Adjusting taxable status for large blocks of items in the event of a government change, such as a change in tax regulations exempting items previously subject to PST
- Addition of products with common attributes to a promotion with a fixed price or at a percentage off
- Identifying all products in a department with margins less than a specified percentage
- Finding products which have not sold since a specific date
- Aligning margin targets on individual items within a product category



To launch Quick Maintenance, click on the **Quick** button located within the **Maintenance** panel of the POS Functions ribbon group.

Item Quick Maintenance

Primary Filters Secondary Filters

Dept.: Start 2 End 2
 Family: Start End
 Pack Size: Start 0.00 End 9999.99
 Mfg: Start ROWN End ROWN
 Vendor: Start End
 Buyer/Rep: Start End
 Location: Start End

Description: Start End
 Search: Description Start End
 Price: Start 0.00 End 999999.99
 Table: Price Start End
 Brand: Start End
 Margin: Start 999- End 999
 Target: Start 999- End 999
 Onhand: Start 999999- End 999999

Class: Start 0 End 99
 Calc #: Start 0 End 99
 Waiting: Start 0 End 99
 Frozen: Start 0 End 99

Stock Flag: Both
 Promo: Check 0
 Tax 123: Both Both Both
 Discount: Both
 Item Type: All Types

Field #1: Pack Size Title: QUICK LISTING
 Field #2: Price Print To: Screen Printer Mark Items For Deletion Continue

Enter End Manufacturer.

NOTE: Use of departments is highly recommended. Searches may take longer to complete if no department range is set.



Quick Maintenance – Using Search Options Effectively

When Quick Maintenance is launched, Assyst Point of Sale displays a selection of search criteria. The search options may be used to query the item file for specific products.

By default, no limits are set.

If a user were to open Quick Maintenance and click on Continue without setting any options, Assyst Point of Sale would show all items in the item file on the report.

As in the screen image on the preceding page, the labels for any options set to contain **limits** will appear in a different colour from other options.

For example, the preceding page shows a Quick Maintenance search screen limited to products:

- Assigned to Department 2 only and
- Assigned to the manufacturer ROWN only

The search results would therefore show details for only products meeting all of the search criteria. Products meeting one but not both of the criteria limits would not be displayed.

Ranges

Many options in Quick Maintenance contain both **Start** and **End** values. These options indicate a search range.

For example, if the search range for Departments are set with a Start value of 2 and an End value of 2, only products in Department 2 may be qualified to appear.

If products between Departments 2 and 15 are required, the Department range would Start with 2 and End with 15.

Why So Many Options?

Even though many search options are available, it is not uncommon to use one or two search criteria to identify narrowly qualified products.

It is important to note that while there are many options, using only a few carefully selected options will suffice when searching for products.

If fewer limits are set, more products are likely to match the search criteria.

For example, if the Department range was set to Start at Department 2 and End at Department 15, all products in those categories may be qualified to appear in the report.

If a further search limit is set on the Price indicating products selling between \$2.00 and \$2.50, the report will show only products that are valued between \$2.00 and \$2.50 in those departments. A product with a price of \$3.00 would not appear, even though it falls between the range of specified departments because it does not meet all of the search criteria.

■ **NOTE:** TELUS Health Solutions recommends the consistent use of all possible fields in Item Maintenance. The more options that are consistently applied, the greater the potential for highly focused search results in Quick Maintenance.

All options listed in Item Quick Maintenance, unless otherwise specified, are available in Item Maintenance. For more information about the usage of specific options, see the Item Maintenance User Guide.



Item Quick Maintenance Search

The search options in Quick Maintenance which are most commonly used are located in the **Primary Filters** tab of the search form.

Category Ranges

Item Quick Maintenance contains a section primarily devoted to searches by product category. This section is circled in green.

These criteria may be used to search for products based on their individual category settings.

Options include:

- Department (Dept)
- Family
- Pack Size
- Manufacturer (Mfg)

- Vendor
- Buyer/Rep
- Location

Item-Specific Attribute Ranges

The second set of search ranges may be used to examine specific attributes of individual item files directly defined by users. These options are circled in purple in the above screen image. Most of these options are independent of product categories:

- Description
- Price
- Table
- Brand

- Margin
- Target
- Onhand



Some options listed in this section do not utilize conventional ranges.

NOTE: Description, Table and Brand ranges search products where descriptions, table codes and brands Start with the options set in the Start and End fields. For example, to find all products with a description starting with OLD D, the Start would be set as OLD D and the End would be set as OLD DZZZZZZZ.

Search

The **Search** option contains two fields.

To use this option, first indicate the type of search by making a selection from the drop-down menu. This option contains a drop-down menu allowing for the selection of Order Number (**Order #**), **Description**, or **Product ID**.

The screenshot shows a search interface with the following elements:

- Search:** A dropdown menu currently set to "Description" with a text input field containing "ZZZZZZZZZZ".
- Price:** A dropdown menu currently set to "Order #" with a text input field containing "999999.99".
- Table:** A dropdown menu currently set to "Price" with a text input field containing "ZZZZZZZZZZZZZZZZ".
- Search Options:** Two radio buttons labeled "Exclusive" (selected) and "Inclusive".

This option determines which item detail is to be compared to the search criteria keyed into the second field.

The second field uses a generalized search. Unlike the Description ranges, the Search field may be set to search for partial matches.

For example, this option may be set to locate all products which **contain** the partial description OLD D, as opposed to setting a Description range limit which only looks at products for which the description starts with the specified criteria.

The **Exclusive** and **Inclusive** options for the Search box are only available where a comma is used in the search. Commas may be used to facilitate searches including multiple search criteria of the type indicated.

If **Exclusive** is selected, the system will show only items which match ALL specified search criteria.

If **Inclusive** is selected, the system will show items which meet at least one of the specified search criteria.

Table

To the left of the Start option for Table search ranges is a drop-down menu which contains a selection for the type of table to be compared in the item search.

By default, the Table search ranges examine **Price Tables**.

For users of Assyst HME, **Rental Table** searches may be performed by selecting Rental from the drop-down menu.

Noteworthy Considerations

When using the **Margin** and **Target** options, percentages for actual and target margins should be entered as whole numbers.

Margin, **Target** and **Onhand** features of individual items may contain negatives, so the search ranges may be set to start at a negative value.

Basic Ordering Settings

Product reorder settings may be used to search for products from the section encircled in green in the following screen image.

The screenshot shows the 'Item Quick Maintenance' window. It has two tabs: 'Primary Filters' and 'Secondary Filters'. The 'Primary Filters' tab is active. It contains several fields for searching items, each with a 'Start' and 'End' date range. The fields are: Dept., Family, Pack Size, Mfg., Vendor, Buyer/Rep, and Location. The 'Secondary Filters' tab is also visible and contains fields for Description, Search, Price, Table, Brand, Margin, Target, and Onhand. A green box highlights the 'Class', 'Calc #', 'Waiting', and 'Frozen' fields in the 'Secondary Filters' section. A purple box highlights the 'Stock Flag', 'Promo', 'Tax 123', 'Discount', and 'Item Type' fields in the 'Secondary Filters' section. At the bottom of the window, there are fields for 'Field #1', 'Field #2', 'Title', 'Print To', and 'Mark Items For Deletion'. The 'Continue' button is located at the bottom right.

Is possible to search by the following basic settings relating to product replenishment activities:

- ☐ Class
- ☐ Calc
- ☐ Waiting
- ☐ Frozen

NOTE: Waiting and Frozen options are only typically queried if an EOQ Ordering model is used.

Other Basic Settings

Additional settings used on most item files may be searched using Quick Maintenance. These settings are based on specific options, and therefore Start and End ranges are not available.

These settings are located at the bottom right of the search form and are circled in purple in the image above.

Because these settings are used differently from most other options in the search form, this section will discuss the usage of each option in detail.

Stock Flag – By default, all products are included in the search regardless of the **Stock** setting on the item file. This option may be used to limit the search results to items with stock flags set as follows:

- ☐ Only Stock Items
- ☐ Only Non-Stock Items
- ☐ Both (the default setting)
- ☐ Variable Price



NOTE: The Both option will select all products regardless of how the related option is set on the item file. The Both option is the default for many settings and behaves in the same way.

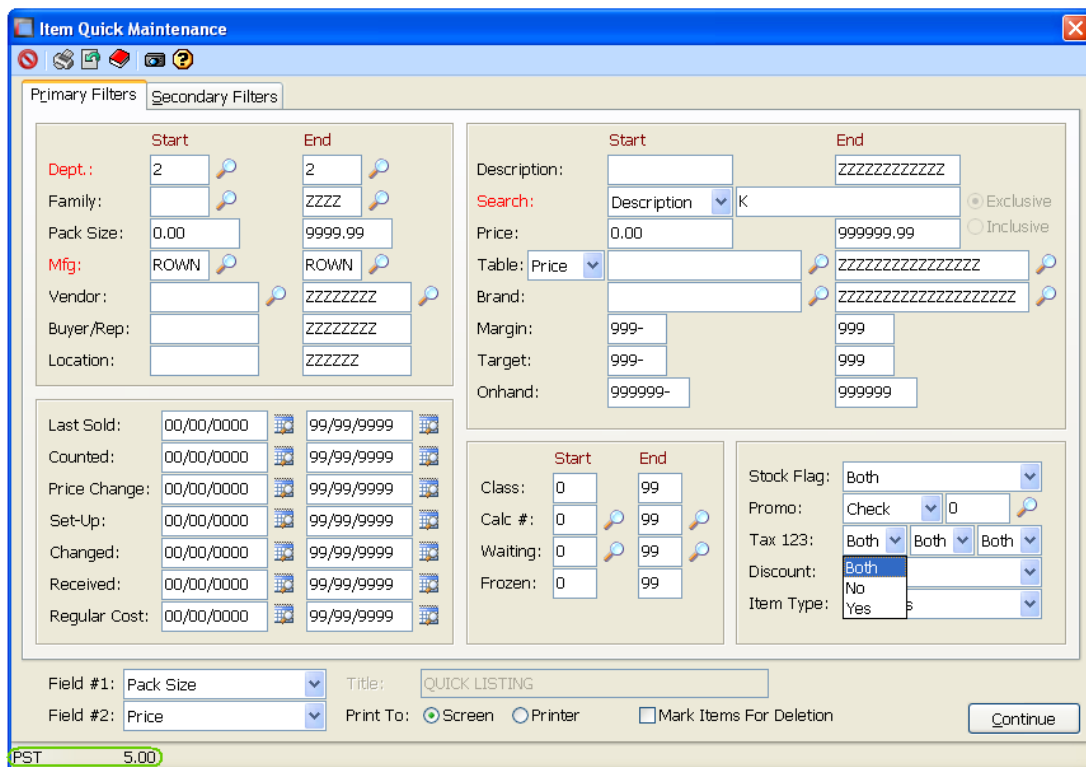
Promo – This option may be used to limit the search to products on a specific promotion and is often used if the **Promo Number** is selected for display in the report.

The first part of the Promo search option determines whether the report is to be limited to items on the promotion. Select **Include** to limit the report results to the inclusion of only products on the specified promotion. The **Check** option will include all qualifying products regardless of whether they are on the specified promotion.

The second part of the Promo search option requires the selection of a specific **promotion number**. Key in the desired promotion number or use the  icon to search.

Tax 123 – This option may be used to limit the search to products on which specific taxes apply. Each tax flag may be limited by selecting either **No** or **Yes** to indicate whether only products exempt or subject to the selected tax are to be included. By default, all products are included regardless of tax status via the **Both** option which indicates that both products exempt and subject to each tax are to be included.

When each tax is highlighted, the description of the tax is displayed at the bottom left of the Quick Maintenance search window to help identify the selected tax. This is circled in green in the screen image below.



The screenshot shows the 'Item Quick Maintenance' window with the 'Primary Filters' tab selected. The window contains several filter sections:

- Primary Filters:** Includes fields for Dept., Family, Pack Size, Mfg., Vendor, Buyer/Rep., and Location, each with 'Start' and 'End' date pickers.
- Secondary Filters:** Includes fields for Description, Search, Price, Table, Brand, Margin, Target, and Onhand, each with 'Start' and 'End' date pickers.
- Class, Calc #, Waiting, Frozen:** Each has a 'Start' and 'End' date picker.
- Stock Flag:** A dropdown menu set to 'Both'.
- Promo:** A dropdown menu set to 'Check'.
- Tax 123:** A dropdown menu set to 'Both'.
- Discount:** A dropdown menu set to 'Both'.
- Item Type:** A dropdown menu set to 'No'.

At the bottom left, the 'Discount' field is highlighted with a green circle, and its description 'PST 5.00' is displayed. The 'Continue' button is at the bottom right.

Discount – This option may be used to limit the search results to products based on whether they are discountable to customers.

- Selecting **Yes** will only include products which are discountable
- Selecting **No** will only include products which are ineligible for discounts
- Selecting **Both**, the default setting, will include all products regardless of whether they are discountable



Item Type – This option may be used to limit the search results to products configured with a specific **Type** setting.

All individual Type settings are available to limit search results to a specific Type. The default setting, All Types, includes all products regardless of their respective Type settings.

Activity Date Options

Quick Maintenance may use items' individual activity dates to search for product. These options are circled in green in the following screen image.

The screenshot shows the 'Item Quick Maintenance' window with the following sections:

- Primary Filters:**
 - Dept.: 2
 - Family:
 - Pack Size: 0.00
 - Mfg: ROWN
 - Vendor:
 - Buyer/Rep:
 - Location:
- Secondary Filters:**
 - Description:
 - Search: Description K
 - Price: 0.00
 - Table: Price
 - Brand:
 - Margin: 999-
 - Target: 999-
 - Onhand: 999999-
- Activity Date Options (Circled in Green):**
 - Last Sold: 00000000
 - Counted: 00/00/0000
 - Price Change: 00/00/0000
 - Set-Up: 00/00/0000
 - Changed: 00/00/0000
 - Received: 00/00/0000
 - Regular Cost: 00/00/0000
- Other Filters:**
 - Class: 0
 - Calc #: 0
 - Waiting: 0
 - Frozen: 0
 - Stock Flag: Both
 - Promo: Check 0
 - Tax 123: Both Both Both
 - Discount: Both
 - Item Type: All Types
- Bottom Section:**
 - Field #1: Pack Size
 - Field #2: Price
 - Title: QUICK LISTING
 - Print To: Screen Printer
 - Mark Items For Deletion
 - Continue

Activity dates refer to any date automatically updated by the system upon completion of a particular activity.

Activity Date types which may be searched are:

Last Sold – Indicates the last date on which the product was sold

Count – Indicates the last date on which an inventory count was performed on the item

Price Change – Indicates the date on which the last change was made to the retail price

Set-Up – Indicates the date on which the product was originally added to the item file

Changed – Indicates the date on which an item's settings were most recently modified

Received – Indicates the date on which an item was most recently received into inventory

Regular Cost – Indicates the date on which the last change was made to costing imported from an electronic vendor catalogue



Secondary Filters

Less commonly used search criteria are located in the **Secondary Filters** tab. These settings include many miscellaneous settings not commonly used in Item Maintenance and/or settings which are not typically used to search for multiple items such as UPC codes.

The screenshot shows the 'Item Quick Maintenance' window with the 'Secondary Filters' tab selected. The window is divided into several sections for different filter categories. The 'UPC Code' section has 'Start' and 'End' fields. The 'Shelf Face' section has 'Start' and 'End' fields. The 'Number Of Labels' section has a single field. The 'Current Cost', 'Average Cost', and 'Regular Cost' sections each have 'Start' and 'End' fields, with an 'Extended' checkbox next to the 'End' field. The 'Rank' section has 'Start' and 'End' fields. The 'Last' section has a 'Last' field. The 'Minimum' and 'Maximum' sections each have a single field. The 'UR', 'OP', and 'LP' sections each have a single field. The 'Coupon' section has a 'Coupon' field. The 'Enforce Quantity' section has a single field. The 'Label Type' section has a single field. The 'Scale Item' section has a single field. The 'Warehouse Flag' section has a single field. At the bottom, there are fields for 'Field #1', 'Field #2', 'Title', 'Print To', and a 'Mark Items For Deletion' checkbox. The 'Continue' button is at the bottom right.

Secondary Filters which use conventional ranges of settings available in Item Maintenance include:

- UPC Code
- Shelf Face
- Number Of Labels (Labels)
- Current Cost
- Average Cost
- Regular Cost
- Rank
- Last
- Minimum
- Maximum
- UR
- OP
- LP

Secondary Filters without ranges default to include all items regardless of whether the referenced setting is selected or deselected. These settings may be set to include or exclude products in the search results based on their usage of specific options in Item Maintenance:

Coupon – Set to **Yes** to limit the search results to Coupon Items only, or **No** to limit the search results to non-Coupon Items.

Enforce Quantity – Set to **Yes** to limit the search results to items configured to Enforce Quantities, or **No** to limit the search results to items not subject to Quantity Enforcement constraints.

Label Type – This option is no longer applicable, as all products should be configured to use **Small** labels.

Scale Item – Set to **Yes** to limit the search results to Scale Items only, or **No** to limit the search results to non-Scale Items.



Warehouse Flag – Set to **Yes** to limit the search results to Warehouse items only, or **No** to limit the search results to non-Warehouse items.

Additional Range Options

Some search ranges in Secondary Filters have additional options which determine how they are used:

Current / Average / Regular Cost – Cost search options in Secondary Filters search individual per unit costs on each item by default. To search for products based on extended cost, also referred to as the inventory value per product at cost, select the **Extended** option to the right of the End field.

Last – This option may be used to search for products based on the last N months' sales (in units) for each item record. The variable N is used to refer to the number of months which is configurable by setting a number in the box to the left of the range **Start** field. The default value for N is 12.

Last 12 99999- 99999

Display Settings

The Quick Maintenance report will always show details of all qualified products' respective UPC codes and Descriptions.

The screenshot shows the 'Item Quick Maintenance' window with the following sections:

- Primary Filters:**
 - Dept.: 2
 - Family: ZZZZ
 - Pack Size: 0.00
 - Mfg: ROWN
 - Vendor: ZZZZZZZ
 - Buyer/Rep: ZZZZZZZ
 - Location: ZZZZZZ
- Secondary Filters:**
 - Description: ZZZZZZZZZZZ
 - Search: Description (dropdown)
 - Price: 0.00
 - Table: Price (dropdown)
 - Brand: ZZZZZZZZZZZZZZZZZZZ
 - Margin: 999-
 - Target: 999-
 - Onhand: 999999-
- Time Range Filters:**
 - Last Sold: 00/00/0000 to 99/99/9999
 - Counted: 00/00/0000 to 99/99/9999
 - Price Change: 00/00/0000 to 99/99/9999
 - Set-Up: 00/00/0000 to 99/99/9999
 - Changed: 00/00/0000 to 99/99/9999
 - Received: Oct 1, 2011 to Oct 31, 2011
 - Regular Cost: 00/00/0000 to 99/99/9999
- Class and Stock Filters:**
 - Class: 0 to 99
 - Calc #: 0 to 99
 - Waiting: 0 to 99
 - Frozen: 0 to 99
 - Stock Flag: Both
 - Promo: Check 0
 - Tax 123: Both Both Both
 - Discount: Both
 - Item Type: All Types
- Field Selection:**
 - Field #1: Pack Size
 - Field #2: Price
 - Title: QUICK LISTING
 - Print To: Screen (selected), Printer, Mark Items For Deletion

The options labelled **Field #1** and **Field #2** may be used to select two additional pieces of information to include on the report. These options are circled in green in the above illustration.

Set each Field to contain the desired optional information about the selected items.

Further options are available which determine where the list of qualified products will generate.



Title – This option is only available when the report is set to **Print To** a Printer. The title will print at the top of each page as part of the report heading.

Print To – If **Screen** is selected, the report will generate to an onscreen grid. If **Printer** is selected, the report will print to the selected system printer.

Mark Items For Deletion – This option is only available when the report is set to **Print To** Screen. If selected, the items which are found to meet the search criteria will be automatically marked for deletion.

NOTE: The **Mark Items For Deletion** option is meant to be used only when the automated deletion of items is desired. If this is not desirable, leave the option deselected to allow for individual selection of items for deletion from the grid.

When all search and display options have been set, click on **Continue** to generate the report.

Field Dependent Options

If the certain **Field** options are selected for display and the report is set to Print To Screen, a further prompt will appear upon clicking on Continue.

The screenshot shows a dialog box titled "Item Quick Maintenance". Inside, there is a "Rank:" label followed by a text box containing the number "1". Below that is a checkbox labeled "Generate Labels For Price Changes" which is checked. Underneath the checkbox is an "Acct Num:" label followed by a text box containing the number "0" and a small key icon. At the bottom center is an "Ok" button.

If a **Vendor & Qty** are set to display, Assyst Point of Sale will prompt for the **Rank** of the vendor to display.

If a **Price** is set to display, Assyst Point of Sale will display a checkbox to indicate whether the system is to automatically **Generate Labels For Price Changes** entered into the grid. By default, the box is selected, thus labels will be enqueued automatically for products on which the price is changed in the grid.

Assyst HME users may also be prompted to set an **Acct Num** if a third party **Catalog Code** or **Catalog Price** field is to be displayed onscreen. This option refers to the A/R account number for the HME third party payer.

NOTE: If Shelf Tags are enqueued from Quick Maintenance, most users will need to print the labels from within the **Shelf Labels** function, located in the **Signage** panel of the POS Functions ribbon group.



Making Changes in Item Quick Maintenance

If an Item Quick Maintenance report has been printed to the screen, it is possible to make modifications to items directly from the grid.

The screenshot shows the 'Item Quick Maintenance' window. It contains a grid with columns: Upc, Item Description, Discount Code, and Price. The grid lists various items like COFFEE CRISP, CRISPY CRUNCH, CRUNCH BAR, CRUNCHIE, DAIRY MILK, EATMORE, FRUIT & NUT, GLOSETTE PEANUTS, GLOSETTE ALMONDS, GLOSETTE RAISINS, HERSHEY ALMOND & TOFFEE CHIPS, HERSHEY COOKIES N CREAM, HERSHEY MILK CHOCOLATE BAR, HERSHEY WITH ALMONDS, HERSHEY'S SPECIAL DARK, HERSHEY'S SPECIAL DARK BAR W/A, JERSEY MILK, and JUNIOR MINTS. Each item has a checkbox in the Discount Code column and a price in the Price column. The 'Generate Labels' checkbox is checked. Below the grid is the 'Additional Information' section, which includes fields for Vendor, Order No, Pk Size, Remarks, Price, Avg Cost, GM%, Type, Related, Qty, Desc, Onhand, Last Sold, Last 12, On Order, Counted, and Average. The bottom status bar shows 'Enter Item Description.' and '49 Found'.

Upc	Item Description	Discount Code	Price
5980000021	COFFEE CRISP	☐	0.99 T
612422	CRISPY CRUNCH	☒	0.99 T
5980013180	CRUNCH BAR	☒	0.99 T
6120022595	CRUNCHIE	☒	0.99 T
6120008445	DAIRY MILK	☒	0.99 T
6800070254	EATMORE	☒	0.99 T
6120008443	FRUIT & NUT	☒	0.99 T
6800001229	GLOSETTE PEANUTS	☒	0.99 T
6800001233	GLOSETTE ALMONDS	☒	0.99 T
6800000228	GLOSETTE RAISINS	☒	0.99 T
5660000029	HERSHEY ALMOND & TOFFEE CHIPS	☒	0.99 T
681130	HERSHEY COOKIES N CREAM	☒	0.99 T
5660000031	HERSHEY MILK CHOCOLATE BAR	☒	0.99 T
5660000030	HERSHEY WITH ALMONDS	☒	0.99 T
5660061072	HERSHEY'S SPECIAL DARK	☒	0.99 T
5660061071	HERSHEY'S SPECIAL DARK BAR W/A	☒	0.99 T
613012	JERSEY MILK	☒	0.99 T
6285176400	JUNIOR MINTS	☒	0.99 T

Additional Information

Vendor: MCK - MCKESSON CANADA Order No: 019984 Pk Size: 45.00 GM Remarks:

Price: 0.99 T Avg Cost: 0.7700 GM%: 22.20 Type: Regular

Related: Qty: Desc: Onhand: 0 Last Sold: Jul 19, 2011 Last 12: 23

On Order: 0 Counted: Jan 2, 2007 Average: 1.9

Enter Item Description. 49 Found

NOTE: Remember that an Assyst Point of Sale grid, such as the one displayed after generating an Item Quick Maintenance report to screen – may be sorted by any of the displayed criteria. Click on the header for the column to be used to re-sort the list. Clicking again on the same header will reverse the sort order.

The total number of matching records is displayed at the bottom right of the Item Quick Maintenance window.

Adjusting Individual Items

It is possible to select one individual items in a grid to be adjusted. Highlight a single record to select it for adjustment.

If a single item displayed in the grid is to be modified, it is possible to click on checkbox settings and/or type alternative settings into the grid directly.

Adjusting Multiple Items

If multiple items listed together in the grid are to be adjusted, click on the first record, then press and hold the **Shift** key on the keyboard. Either click on the last record or use the Down Arrow and/or Page Down key(s) to scroll through the list until the last adjacent record to be adjusted has been highlighted.

NOTE: It is important to highlight the specific option to be modified before selecting multiple records for adjustment.

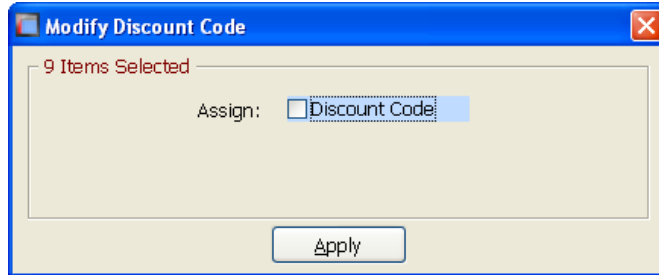
Release the Shift key when item selection is complete.



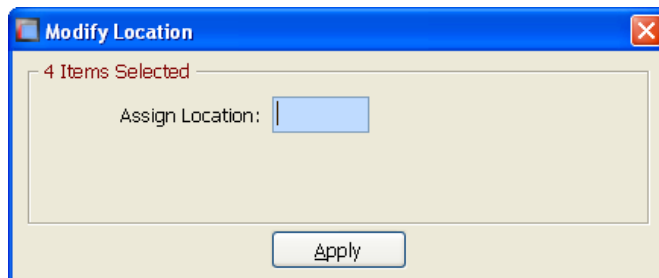
Click on the  button to modify the selected setting on the highlighted record(s).

The system will display a prompt to change the selected setting for all of the highlighted records.

Depending on the nature of the modification, a number of prompt types may appear.

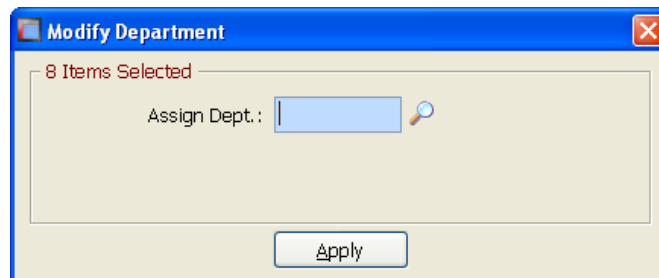


A prompt similar to the one pictured at the left will appear when a setting to be modified is represented by one or more checkboxes in Item Maintenance.



If items' settings represented by text is being changed, such as Location or a Display Bar setting, a text prompt will appear. Key in the new setting value.

For a setting like Pack Size, two prompts will appear, similar to those which appear in Item Maintenance.



If items are to be reassigned to categories with an available lookup, a text field will appear for the entry of a value.

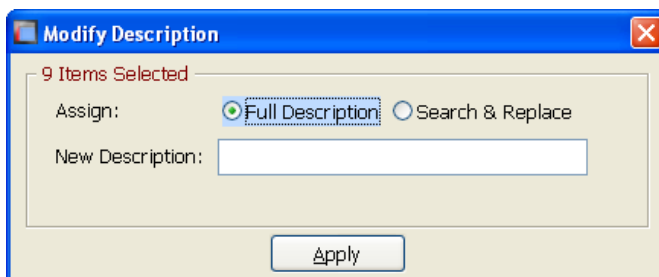
A lookup icon is also displayed to facilitate the lookup of pre-existing settings.

 **NOTE:** To quit from any multiple item modification without making changes, click on the  icon at the top right of the window.

Modifying Descriptions

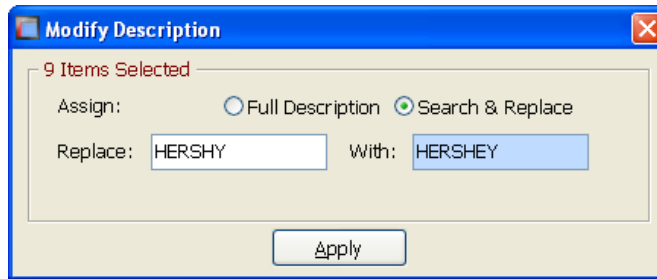
If Descriptions are highlighted when the Modify button is clicked, the system will prompt for the adjustment of the all the selected descriptions.

Two types of description modifications can be completed from Item Quick Maintenance:



If **Assign Full Description** is selected, any details keyed into the **New Description** field will replace the previously-set product descriptions.



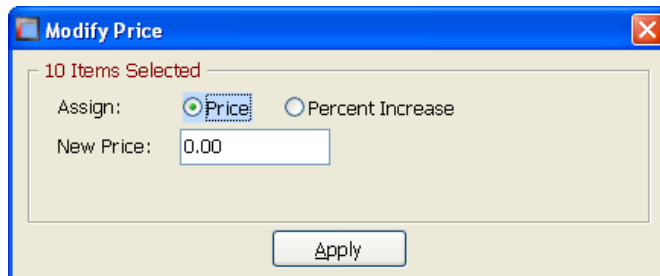


Alternatively, the **Search & Replace** option may be used to search the selected product records and replace keywords in the items' respective descriptions.

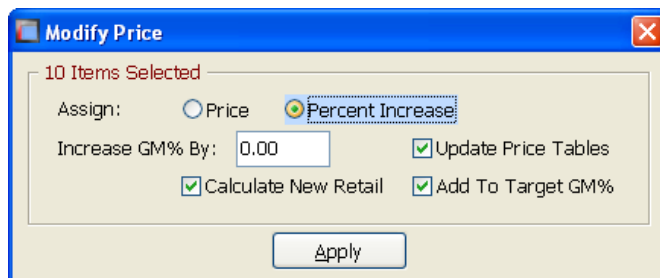
The sample Search & Replace at the left would replace all instances of the incorrectly spelled "HERSHY" with the corrected spelling "HERSHEY".

Modifying Prices

Multiple items' prices may be modified in more than one way using Item Quick Maintenance.



If a fixed price is to be set, select the **Price** option and key in the desired price to be applied to all of the selected products.



If a percentage increase is to be applied to all selected items, select the **Percent Increase** option and key in the amount by which the Gross Margin percentage (**GM%**) is to be increased on all products.

If the Gross Margin percentage is to be reduced on all products, indicate the amount of the increase as a negative number.

Select the **Calculate New Retail** checkbox to recalculate the new retail price based on the gross margin percentage increase indicated.

Select the **Update Price Tables** checkbox to update the price tables for any products on tables affected by the price increase or decrease. This will apply the percentage to all price levels in the table by adjusting each level's gross margin by the percentage specified, and rounds the new price(s) to the whole cent.

Select the **Add To Target GM%** to adjust the product Target Margin by the same percentage the Actual Margin was adjusted by.

Adding Items to a Promotion

One or more items displayed in an Item Quick Maintenance grid may be added to an existing promotion by clicking on the  icon, or selecting Add To Promo from the right click menu.

When this option is selected, the Add To Promotion window will appear. Set the details to be applied to the selected items including:

Promo – Key in the desired promotion number, or use the lookup to identify the promotion





Add To Promotion

10 Items Selected

Promo: 48 Starts: Apr 15, 2011

Description: LOYALTY PROMOTION

Assign: ☒ Price ☐ Percent Off

Price: 1 / 0.00

Cost: 0.00 ☒ Use Average Cost

Save

Assign – Select **Price** to set a fixed promotional price for all selected products or **Percent Off** to determine promotional pricing through application of a standard percentage to regular retail prices

Price – If promotional pricing is to be assigned as a fixed price, key in the price

Percent Off – If promotional pricing is to be calculated using a standard percentage off regular retail prices, key in the percentage to be applied.

Use Average Cost – This option, selected by default, will set the promotional cost for each selected item as its average cost. If this option is deselected, a fixed cost for all selected products will need to be entered in the **Cost** field. The Cost field is unavailable when the Use Average Cost option is selected.

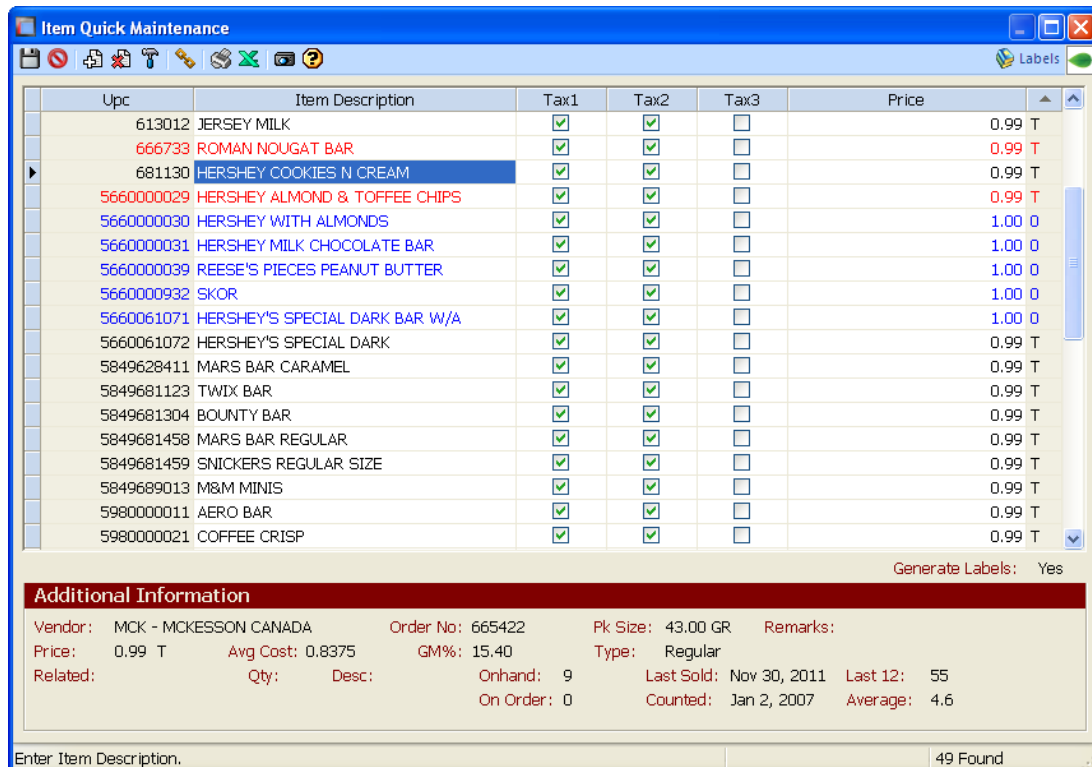
NOTE: For more information about Promotions, see the Assyst Promotions User Guide.

Identifying Adjusted Records

If a record has been adjusted in Item Quick Maintenance, Assyst Point of Sale will show the item options in blue text.

The record remains visible in the grid even though it may no longer conform to the original search criteria.

NOTE: Adjustments entered in Quick Maintenance, excepting modifications to Price tables using the Percent Increase function, are not finalized until clicking on the **Save** button and may be entirely discarded by clicking on the **Cancel** button.



Upc	Item Description	Tax1	Tax2	Tax3	Price
613012	JERSEY MILK	☒	☒	☐	0.99 T
666733	ROMAN NOUGAT BAR	☒	☒	☐	0.99 T
681130	HERSHEY COOKIES N CREAM	☒	☒	☐	0.99 T
5660000029	HERSHEY ALMOND & TOFFEE CHIPS	☒	☒	☐	0.99 T
5660000030	HERSHEY WITH ALMONDS	☒	☒	☐	1.00 0
5660000031	HERSHEY MILK CHOCOLATE BAR	☒	☒	☐	1.00 0
5660000039	REESE'S PIECES PEANUT BUTTER	☒	☒	☐	1.00 0
5660000932	SKOR	☒	☒	☐	1.00 0
5660061071	HERSHEY'S SPECIAL DARK BAR W/A	☒	☒	☐	1.00 0
5660061072	HERSHEY'S SPECIAL DARK	☒	☒	☐	0.99 T
5849628411	MARS BAR CARAMEL	☒	☒	☐	0.99 T
5849681123	TWIX BAR	☒	☒	☐	0.99 T
5849681304	BOUNTY BAR	☒	☒	☐	0.99 T
5849681458	MARS BAR REGULAR	☒	☒	☐	0.99 T
5849681459	SNICKERS REGULAR SIZE	☒	☒	☐	0.99 T
5849689013	M&M MINIS	☒	☒	☐	0.99 T
5980000011	AERO BAR	☒	☒	☐	0.99 T
5980000021	COFFEE CRISP	☒	☒	☐	0.99 T

Generate Labels: Yes

Additional Information

Vendor: MCK - MCKESSON CANADA Order No: 665422 Pk Size: 43.00 GR Remarks:

Price: 0.99 T Avg Cost: 0.8375 GM%: 15.40 Type: Regular

Related: Qty: Desc: Onhand: 9 Last Sold: Nov 30, 2011 Last 12: 55

On Order: 0 Counted: Jan 2, 2007 Average: 4.6

Enter Item Description. 49 Found



Undo an Item Change

If an item has been modified and the modification is to be reversed, highlight the item and right click.

Select **Undo Change** from the right click menu.

Undo an Item Deletion

If an item has been erroneously marked for deletion, highlight the item and right click.

Select **Undo Delete** from the right click menu.

 **NOTE:** If the changes and deletions are saved, some users may be able to recover deleted items via the Utility Functions and/or Item Maintenance lookup functions. For more information, consult the Utility Functions and/or Item Maintenance User Guides.

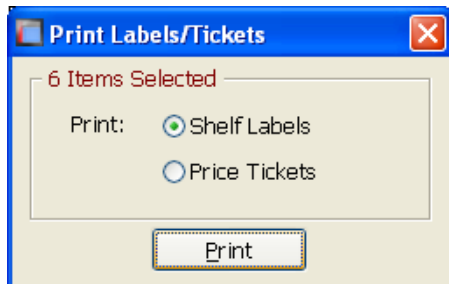
Printing Price Labels from Quick Maintenance

Shelf Tags and Price Tickets may be generated for products listed in Item Quick Maintenance on demand.

 **NOTE:** Availability of this function is not affected by the **Generate Labels For Price Changes** prompt.

After selecting the products for which a label is to be printed, click on the **Labels** button to the left of the Busy Icon at the top right of the Item Quick Maintenance report window.

Assyst Point of Sale will then prompt for the selection of a label type.



Click on **Shelf Labels** to print shelf tags or select **Price Tickets** to print price tickets for the selected items.

This process may be repeated if both shelf tags and price tickets are required.

Click **Print** after making the selection to add the labels for the selected product(s) to the appropriate label queue.

 **NOTE:** If Shelf Tags or Price Tickets are enqueued from Quick Maintenance, most users will need to print the labels from the appropriate label selections within the **Signage** panel of the POS Functions ribbon group.

The quantity of labels added to the print queue will be automatically determined based on:

-  the quantity of Shelf Tags specified on each Item Maintenance record (Shelf Labels) OR
-  the Onhand quantity in each product file at the time the tickets are added to the queue (Price Tickets).

For more information about printing Shelf Tags and Price Tickets, consult the Shelf Tags and/or Price Tickets User Guides.

Other Item Quick Maintenance Functions

Click on  to **Zoom** into a specific item record's Item Maintenance screen for more information.

Click on  to **Export** the table to Excel.

Click on  to **Delete** the selected items. Items marked for deletion are displayed using red text.

