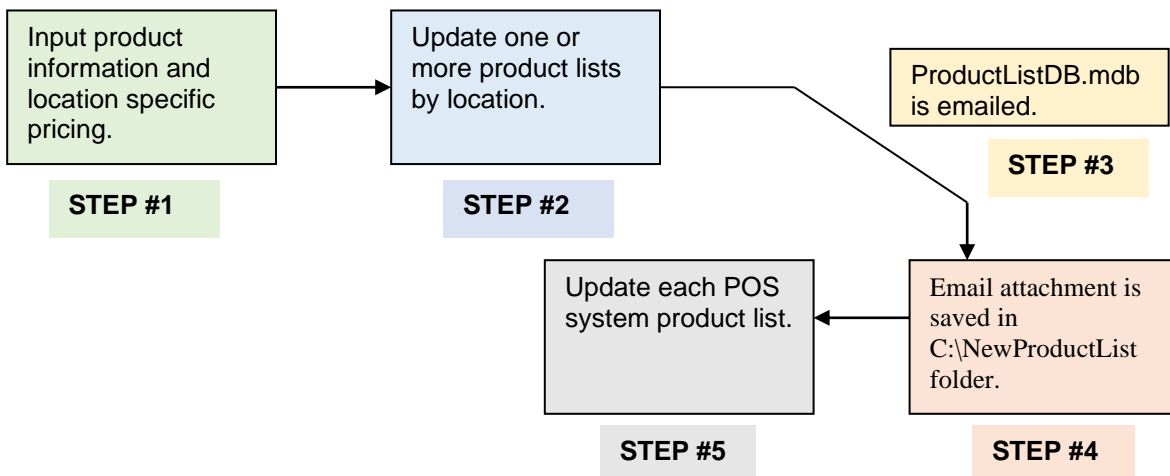# Product List Management System Guide

The Product List Management System (PLMS) was developed in order to allow for the central management of the Point of Sale (POS) system's product list. Some of the more salient features of the PLMS include:

- Centrally generated individual product lists for multiple locations;
- Single-window product list management where all locations and prices are displayed;
- Default pricing, as well as, location specific pricing, are available;
- SKU/UPC reuse check to make sure that no active products are assigned the same SKU/UPC;
- Simple one-window/one-decision product list updating at the store level;
- Product list updates are logged; and
- All updated product lists are stored and emailed using a single small footprint .mdb file.

How It All Fits Together

Input product information and location specific pricing.

STEP #1

Update one or more product lists by location.

STEP #2

ProductListDB.mdb is emailed.

STEP #3

Update each POS system product list.

STEP #5

Email attachment is saved in C:\NewProductList folder.

STEP #4

Figure 1 – Updating the POS Product List

Figure 1 provides an overview of the product list updating process. **Steps #1** and **Step #2** are accomplished using the PLMS; **Step #3** and **Step #4** are accomplished using an email application such as Eudora or Outlook Express; and **Step #5** is completed using the POS system.

Step #1 - Managing Product Information

Start the PLMS application by double clicking the appropriate icon on the desktop and select Product List Management from the main menu.

The Inventory Management Form is password protected, enter your login ID and password.

Once you have gain access to the Inventory Management Form there are a number of tasks which can be performed, including:

1. Editing an Existing Inventory Product
2. Adding a New Product to Inventory
3. Selecting Locations and Pricing

The application was developed in such a way that the user adds products to inventory and then, if so desired, determines which products are sold at which locations at what price. In other words, products are first added to an inventory of products and then products are designated to be sold at specific sales locations. The user can assign locations during the same session or during future session.

1.0 Editing an Existing Product in Inventory

The user can review the list of available products either by making use of the navigation buttons located on the right-hand side of the Inventory Management Form or by using the combo box labeled Select an SKU/UPC at the very top of the form.

The user saves any changes that are made in a way that is dependent on how one navigates through the product list.

*   One can always click on the save button and any changes to the inventory information will be saved immediately.

*   If the user is using the combo box to move from product to product, then the user will be asked if the changes that where made should be saved

*   Simply moving from product to product using the navigation buttons ensures that any changes will automatically be saved.

Because there is a need to reuse SKU/UPCs the editing of both the SKU/UPC field and the active field is a critical process. The application ensures that no two ACTIVE products have the same SKU/UPC. The exception to this rule occurs when no SKU/UPC is input; i.e. it is possible to have any number of products that are active, but have no SKU/UPC.

In order to ensure that SKU/UPCs are not corrupted with spaces, the application removes from any newly entered SKU/UPC all leading and trailing spaces. If this was not done, over time matching SKU/UPCs within the POS systems could become almost impossible.

Prior to saving changes, the user can undo the changes that were made to a product in inventory by either clicking the Undo button or pressing the ESC button.

2.0 Adding a Product in Inventory

In order to add a new product to the product inventory start by clicking the New button; the user is immediately presented with a blank Inventory Management Form. It is important to note that once a product has been added to the inventory it cannot be deleted. This ensures that no product information is lost. Products that are no longer sold within the enterprise should be deactivated

For now, let's just focus on inputting new product information, we will discuss the portion of the form labeled Products and Prices at Various Locations in a later section of this guide.

All the required inputs or fields have green labels. In order to save a new product in inventory one must input valid values for:

- Product Description
- Active
- Default Price
- Default Price for GST
- Default Price for PST
- Department Name
- Category

The Active field and all of the default prices have default values. The default value for the active field is true (i.e. the check box is checked). The default value for each of the default prices is $1.00.

The SKU/UPC field can be left blank or one can input an alphanumeric value that is up to 14 characters in length. If a SKU/UPC code is input, the application will search the database of products in order to ensure that no ACTIVE products are already using this SKU/UPC.

If an SKU/UPC is already being used by an active product then the user has two choices

- Select a different SKU/UPC for the new product; or
- Leave the SKU/UPC field blank, complete the new product entry process, deactivate the product in inventory that is using the desired SKU/UPC, and then input the desired SKU/UPC in the appropriate text box of the newly added product.

This check is necessary in order to allow us to reuse SKU/UPCs, while at the same time ensuring that no two active products are using the same SKU/UPC.

As already noted in the above section entitled Editing an Existing Product in Inventory, all leading and trailing spaces are removed from SKU_UPCs.

To save the new product, review the information on saving in the above section entitled Editing an Existing Product in Inventory

3.0 Selecting Locations and Pricing

So far, we have just looked at how the upper portion of the Inventory Management Form works. Once we have input and saved a new product inventory, that product becomes available for sale at various locations. Using the Products and Prices at various Locations section of the form we can assign locations, set location specific pricing and activate/deactivate a location/pricing record.

Just like the upper portion of the window, all required fields are labeled in green. The required fields are:

- Store No.
- Price
- Price for GST
- Price for PST
- Active

To view the allowable store locations, click on the arrow of the combo box labeled Store No. To select a store location, simply click on the desired store location.

Upon selecting a store, the price fields are immediately filled in with the products default values. You can leave these values as they are, or you can input location specific values.

The location is also, by default, set as active. While the price fields are editable, new prices for a location should be entered by inputting a new location/pricing record. In this way the user develops a pricing history for the product which can be easy viewed each time the product is viewed.

Similar to the assigning of SKU/UPCs and the activating of products in inventory, once a location has been assigned a product and the location is active it is not possible to assign a product to the same location twice. In the case where the user attempts to do so, two error messages are displayed and the user has two choices:

- Select a different location; or
- Undo the location entry by pressing the ESC key twice, deactivating the previously entered location/pricing entry, and then reentering the new entry.

The application does not allow the user to delete location/pricing records.

Once you have made all the necessary changes to the product inventory and specified locations and pricing as needed, close the Inventory Management Form by clicking the Close button.

Step #2 - Updating Product Lists by Location

The next step is to create the updated products list that will be sent to each store location. All location specific product lists are stored in one file. The POS at each location knows which product list is meant for that location, significantly reducing the possibility of error.

From the main menu select Create Updated Product Lists. The Create an Updated Product List window is password protected, please enter your user ID and password. Once you have gained access to the Create an Updated Product List window, click on the arrow of the combo box labeled Select a Store No. Select the store for which an updated product list will be created by clicking on the appropriate store. To complete the process, click on the command button labeled Create a New Product List.

Upon successful completion of the new list creation process a successful completion message is displayed on the Create an Updated Product List window. The message verifies the location chosen and the location and name of the file that holds all updated product lists.

The successful creation of a new product list generates an entry in the Product List Updates log. The log is accessed by selecting Reports from the Main Menu and then selecting Log of Product List Updates.

If you want to create a new list for another location, select another location and repeat the steps just discussed.

Once the desired lists have been updated, close the Create an Updated Product List window by clicking the close window icon found in the upper right-hand corner.

Step #3 - Email ProductListDB.mdb

The use of an email application is beyond the scope of this guide. If you need instruction on how to email messages with attachments, please contact your technical support.

Step #4 - Save ProductListDB.mdb

ProductListDB.mdb must be saved on each individual POS system in a folder named C:\NewProductList. This ensures that the POS will be able to access the most recent version of the ProductListDB.mdb file.

Saving the newest version of ProductListDB.mdb in the proper folder should result in an operating system query that asked whether you want to replace the older version with the newer version. You should check the dates associated with each file to make sure that you are replacing an older version with a newer version.

Step #5 - Update POS System Product List

From the Main Menu of the Point-of-Sale system select Update Product List. The ability to update the POS system's product list is password protected, please enter your login ID and password. Once you have access to the Update Product List window, click on the command button labeled Update. You are asked one last time if you wish to proceed with updating the product list.

If you click yes to proceed with the product list update, the application proceeds to automatically update the POS's product list. Upon successful completion of the update, a message is displayed indicate a successful update. Closing the message window returns you to the Main Menu.

If you select no, a cancellation message is displayed. Closing the message window returns you to the Main Menu.

Select Cash Register from the Main Menu, login, and check to see if the new product list is displayed properly by opening the dropdown window of the Product Code combo box. If no products are available, please contact your database administrator immediately.

POS System Product List Backup

Unfortunately, it is possible that a product list file may become corrupted during the transmission process. In addition, human error may also have produced a product list that contains unacceptable errors. In both case this may not be realized by the POS user until sometime after the updating of the POS product list.

While the optimal solution may be to simply reissue a corrected version of the product list, it may not always be possible to do so in a timely fashion. In order to avoid a situation where a POS system may be rendered inoperable due to a corrupted product list, each POS system has a backup copy of the most recently replaced product list.

Note: It is critical that once a product list has been determined to be corrupted that it NOT be reinstalled on the POS system. Attempting to do so will destroy the working backup and at the same time create a backup of the corrupted product list.

To install the backup copy of the POS system's product list, from the POS system's Main Menu select Admin Utilities and then select Install Backup Product List. Once the user has provided the proper managerial level user ID and password, the Install Backup Product List window becomes the active window. Proceed to install the backup product list by clicking the Install button and clicking Yes when asked if you want to proceed with the installation process.