



Product Import Pricing Tool

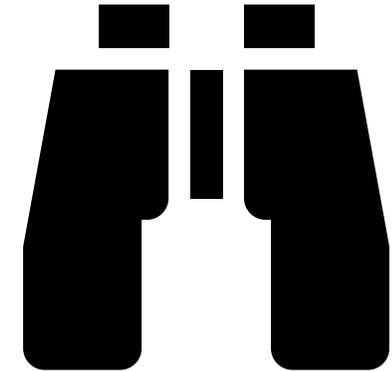
Scott Phillips

Overview

Update to the Global product Replacement tool: Avanti Markets team has updated the logic to the GPR tool. Replacement products will remain extended to the market location allowing the product to sell out. The Min/Max par levels will be changed to 0/0 for replaced products.

Product Management overview

- Single product changes across multiple markets
- Editing products at a single market location
- Legacy Bulk Update Tool
- New Import Product Bulk Update Tool



Bulk Pricing and Location Product Import Tool

Avanti markets offers multiple ways to edit and manage products for every situation

We have enhanced our bulk pricing tool to **allow an XLSX spreadsheet** to be uploaded for single or multiple market locations.

This enhancement allows operators to edit cost, price, and min/max par levels

This tool is very handy for making **changes** across multiple market locations



Single Product Changes



Prior to making product pricing or cost changes you first need to understand what you are trying to accomplish and select the proper product management tools to complete your task

- **Single product pricing changes across multiple markets.**
 - Select the products tab in AMS and select product list
 - Use the search field to query the product you want to adjust
 - You can edit the product price, cost, min, max
 - Once you have edited the fields you have the following 3 options.
- 1) **Update:** This option will only edit the master product record. This option will not extend changes to market locations
- 2) **Update and Extend:** This option will display a list of ALL market locations allowing you to extend the changes from the master product list to the selected or ALL market locations
 - This option is perfect for extending products to ALL or targeted market locations within your org
- 3) **Update Existing:** When selected only the locations where the product is currently extended will be displayed.
 - This options is ideal for making quick edits to single product across multiple markets

Update Existing Product Extensions

Product: [Snickers Market Size](#)

Choose Locations

- Select All
- 51 ANC TTP
- 51 BMW Northwest TTP
- 51 Cadence
- 51 Carille Transportation
- 51 Charter College Fife TTP
- 51 Evergreen Tumwater Lunchroom TTP
- 51 Fab Center TTP
- 51 Lynden Transport TTP
- 51 Milgard Windows Corporate TTP

Choose Properties

- Select All
- Price
- Cost
- Min Quantity
- Max Quantity
- EOQ
- Points
- Tax Category

UPDATE LOCATIONS

Edit Product

Product Name	<input type="text" value="Snickers Market Size"/>	Cost	<input type="text" value="1.24"/>
Operator Product Code	<input type="text" value="MMM32252"/>	Default Price	<input type="text" value="2.49"/>
Category	<input type="text" value="CANDY"/>	Gross Margin	<input type="text" value="50.20 %"/>
Attendant Category	<input type="text"/>	Points	<input type="text" value="1"/>
Tax Category	<input type="text" value="None"/>	Default Min Stock	<input type="text" value="6"/>
Deposit Category	<input type="text" value="None"/>	Default Max Stock	<input type="text" value="12"/>
		Default EOQ	<input type="text" value="0"/>

Edit Product Advanced Settings

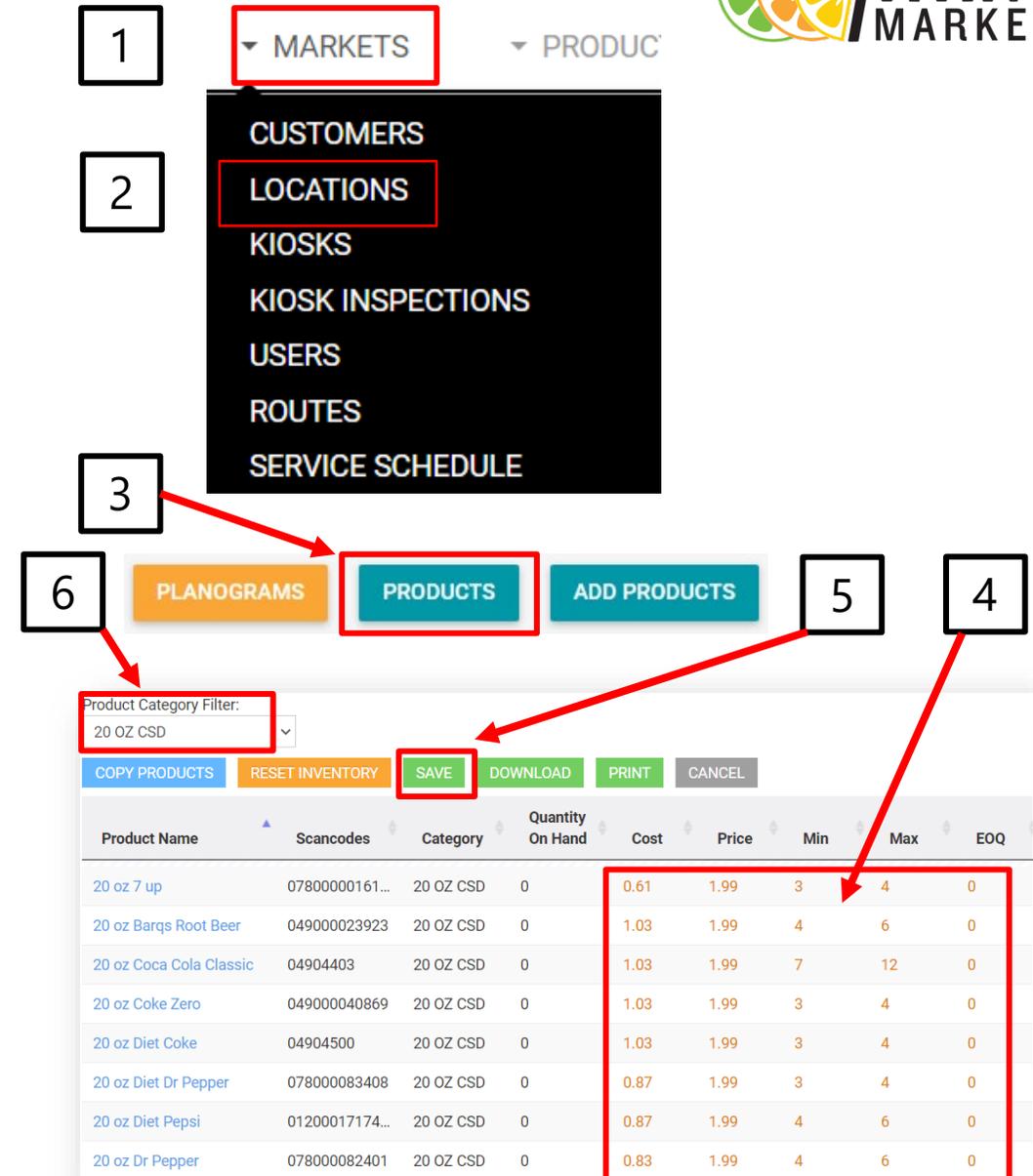
Some advanced settings may be crucial for Edit Products
Check the 'Edit Product Advanced Settings'
above for more information.

UPDATE UPDATE AND EXTEND UPDATE EXISTING DISABLE CANCEL

Location Product Edits

Follow these steps if you need to make pricing, cost, or min/max edits to a single market location product list

1. Select the markets tab
2. Select Locations on the dropdown and select the location record you want to edit products
3. Click on the **Products** button
4. You can edit the cost, price, min/max, and EOQ (Economic Order Quantity) shown in orange text
5. Once you have made your edits click the 'Save' button to permanently save the changes
6. **Best Practice – If you are looking to edit a product category such as 20oz Soda use the product category. This filter will only display the 20oz products associated with that product category**



The screenshot shows the Avanti Markets interface with the following elements highlighted:

- 1:** The 'MARKETS' dropdown menu.
- 2:** The 'LOCATIONS' option in the dropdown menu.
- 3:** The 'PRODUCTS' button in the navigation bar.
- 4:** The 'Min' and 'Max' columns in the product list table.
- 5:** The 'SAVE' button in the product list toolbar.
- 6:** The 'Product Category Filter' dropdown set to '20 OZ CSD'.

Product Name	Scancodes	Category	Quantity On Hand	Cost	Price	Min	Max	EOQ
20 oz 7 up	07800000161...	20 OZ CSD	0	0.61	1.99	3	4	0
20 oz Barqs Root Beer	049000023923	20 OZ CSD	0	1.03	1.99	4	6	0
20 oz Coca Cola Classic	04904403	20 OZ CSD	0	1.03	1.99	7	12	0
20 oz Coke Zero	049000040869	20 OZ CSD	0	1.03	1.99	3	4	0
20 oz Diet Coke	04904500	20 OZ CSD	0	1.03	1.99	3	4	0
20 oz Diet Dr Pepper	078000083408	20 OZ CSD	0	0.87	1.99	3	4	0
20 oz Diet Pepsi	01200017174...	20 OZ CSD	0	0.87	1.99	4	6	0
20 oz Dr Pepper	078000082401	20 OZ CSD	0	0.83	1.99	4	6	0

Legacy Bulk Update Pricing Tool

- **Before using Legacy or New Bulk Update tool follow these steps**
 - **Run the “Product Sales by Location report for ALL of your markets and save it for your records**
 - This is to ensure you have a backup pricing list in the event mistakes are made
 - Ensure your team members do NOT use this tool without being trained
 - Have your team review the documentation available in help center or reach out to your account manager

Products

Product Category Filter:

All Categories ▾

Show Disabled

No Scan Only

NEW PRODUCT

SAVE

DOWNLOAD

PRINT

BULK UPDATE

Legacy Bulk Update Pricing Feature

The legacy bulk update was initially intended to update single product category pricing for multiple market locations

- This tool allows you to increase or decrease cost & price
- Pricing can only be adjusted by a fixed rate or percentage
- Points are no longer used today as this is a legacy program
- **Important Note: Not recommended to update All categories**
- **New Import location tool is a much better option**

Products Bulk Update

Make Bulk Changes

Import Bulk Changes



Filter

20 OZ CSD

--All Manufacturers--

--All Sizes--



Apply Changes To

Product Catalog

- [Empty Input]
- 1 Test Location for Avanti Lab sullivan
- 1234
- 20190603 Test Admin
- 20190603 Test Operator
- A J Veit Test Location
- Accent Test
- Acme Cafe

Selected Locations



Edit

Update

- Price
- Cost
- Points

Alter Price By Price

- Amount
- Percentage

Amount

To raise the price by 25 cents enter .25
To reduce the price by 25 cents enter -.25

Update

All updates are final. Please confirm the update behaves as planned on one product before updating a large number of products.

How To Use The Legacy Bulk Update Tool

1. Select the product category
2. Select all or specific products you want to adjust
3. Select Price or Cost
4. Select fixed Amount or percentage rate
5. Enter the amount or percentage into the amount field
6. Be sure not to forget your decimal point for fixed dollar amounts

Note: Manufacturer and product size filters are legacy fields that cannot be edited by operators

1
 Filter

**Manufacturer & Sizes Filters
Cannot Be Used**

20 OZ CSD ▾

--All Manufacturers-- ▾

--All Sizes-- ▾

2

<input checked="" type="checkbox"/>	Name	Category	Manufacturer	Size	Cost	Price	Points
<input checked="" type="checkbox"/>	20 oz 7 up	20 OZ CSD			\$1.65	\$1.79	1
<input checked="" type="checkbox"/>	20 oz 7 up	20 OZ CSD			\$1.65	\$1.79	0
<input checked="" type="checkbox"/>	20 oz A&W Root Beer	20 OZ CSD			\$0.73	\$1.79	1
<input checked="" type="checkbox"/>	20 oz A&W Root Beer	20 OZ CSD			\$0.73	\$1.79	0
<input checked="" type="checkbox"/>	20 oz Canada Dry Ginger Ale	20 OZ CSD			\$0.67	\$1.79	1
<input checked="" type="checkbox"/>	20 oz Canada Dry Ginger Ale	20 OZ CSD			\$0.67	\$1.79	0
<input checked="" type="checkbox"/>	20 oz Coca Cola Classic	20 OZ CSD			\$0.84	\$2.54	1

3

Price
 Cost
 Points

Alter Price By Price

4

Amount
 Percentage

5

Amount

To raise the price by 25 cents enter .25
To reduce the price by 25 cents enter -.25

Update

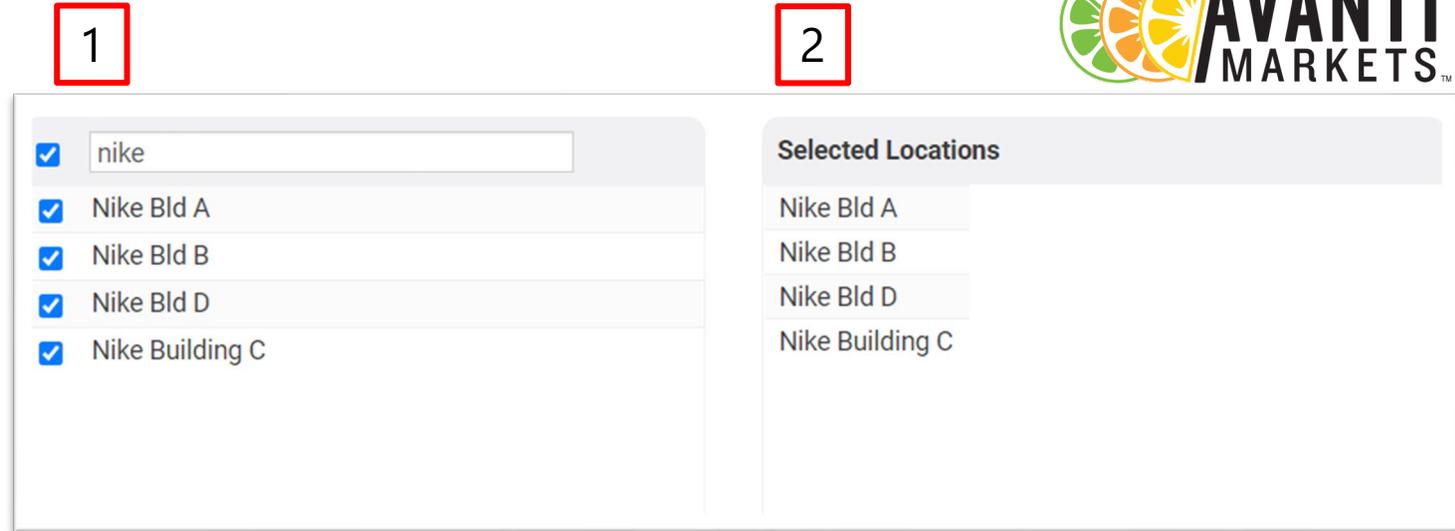
How To Use The Legacy Bulk Update Tool (Continued)

1. Select the market locations you want to update using the search field
2. Review and confirm the selected locations are correct
3. Check the Product Catalogue box if you want to change the master product list price or cost in addition to the market locations
 - Review your changes carefully as all updates are final. There is no undo option
4. Select the update button to implement the changes
5. Spot check your changes to ensure they were completed successfully

Note: The new import pricing location tool is a better option to make changes to multiple locations

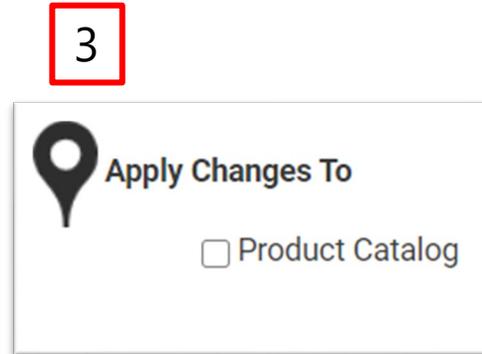
1

2



The screenshot shows a search interface with a search bar containing 'nike'. Below the search bar is a list of search results, each with a checked checkbox: Nike Bld A, Nike Bld B, Nike Bld D, and Nike Building C. To the right of the search results is a 'Selected Locations' panel containing a list of the same four locations: Nike Bld A, Nike Bld B, Nike Bld D, and Nike Building C.

3



The screenshot shows a section titled 'Apply Changes To' with a location pin icon. Below the title is a checkbox labeled 'Product Catalog', which is currently unchecked.

4



The screenshot shows a green button labeled 'Update'.

All updates are final. Please confirm the update behaves as planned on one product before updating a large number of products.

New Product Import Pricing Tool Overview

The New Location Import Pricing Tool allows operators to make the following changes across many or all market locations

- **Disclaimer: This is NOT a new product import creation tool**
- This import tool allows operators to edit the following fields
 - Product Price
 - Product Cost
 - Product Minimum par level
 - Product Maximum par level
 - EOQ (Economic Order Quantity). This is a rounding rule



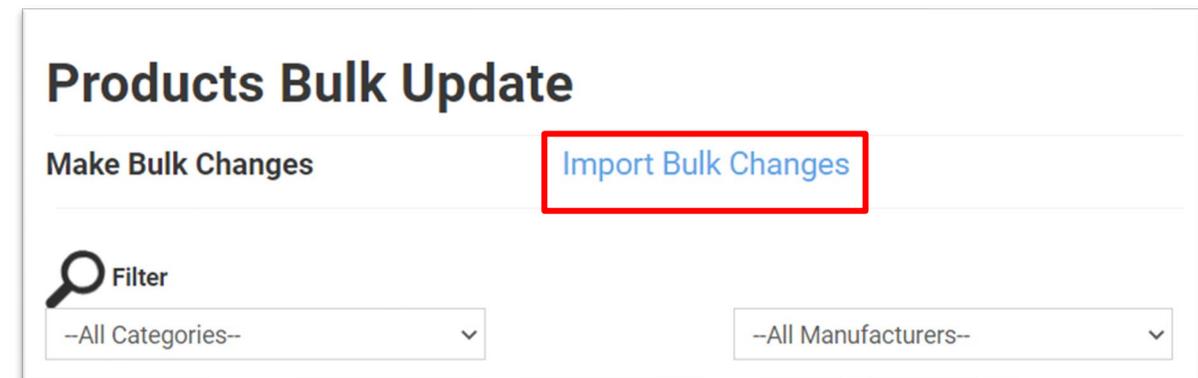
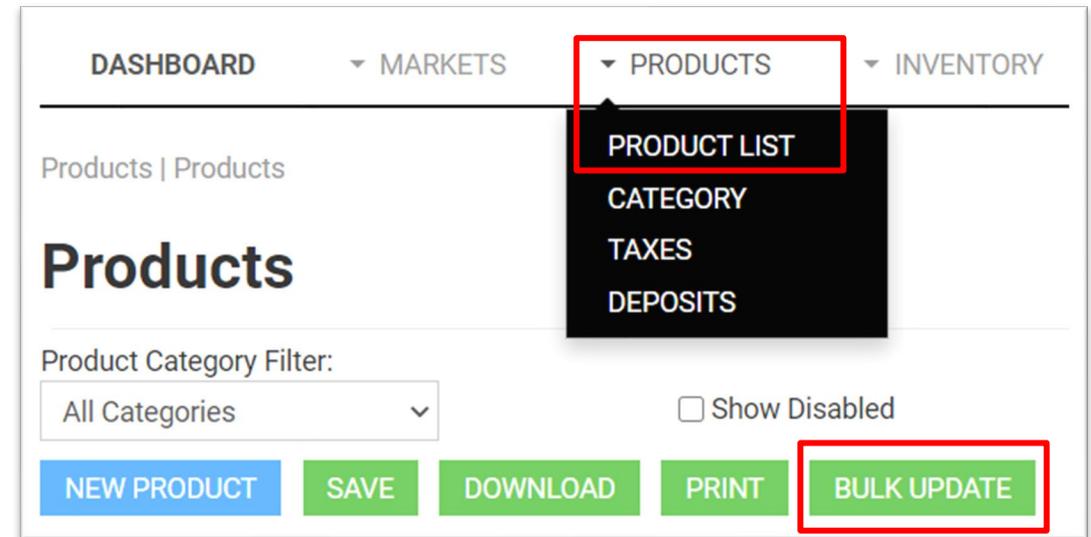
New Product Import Tool

- The Bulk Pricing Import Tool is located within the Legacy Bulk Update Tool
1. Go to the Product tab in AMS and click on the Product list dropdown option
 2. Click on the Bulk Update button to access the tool

Once you have opened the tool you will see the blue text [Import Bulk Changes](#) at the top of the page

Click on the [Blue Import Bulk Import](#) Changes text to access the import feature

Important Tip: Please note that any blue text within AMS allows you to drill down to new features or data details



Import Bulk Changes

- Once you have accessed the Import Bulk changes tool you will need to click on the Download the [Import Template](#) blue text which will display the Product Pricing by Location XLSX Report

Products Bulk Update

[Make Bulk Changes](#)

Import Bulk Changes

Import Bulk Changes

Upload



Click Blue Text

Download the [Import Template](#)



Import Bulk Changes

Product Pricing By Location

** Reports current as of Wednesday 9:24 pm (02/10/2021). **

[Export to XLSX](#)

Select Route:
All Routes

Locations for All Routes		Selected	
<input type="checkbox"/> All	Filter Results	Filter Results	
<input checked="" type="checkbox"/>	Nike Bld A	<input checked="" type="checkbox"/>	Nike Bld A
<input checked="" type="checkbox"/>	Nike Bld B	<input checked="" type="checkbox"/>	Nike Bld B
<input checked="" type="checkbox"/>	Nike Bld D	<input checked="" type="checkbox"/>	Nike Bld D
<input checked="" type="checkbox"/>	Nike Building C	<input checked="" type="checkbox"/>	Nike Building C
<input type="checkbox"/>	NONO Name Changed		
<input type="checkbox"/>	NONO2		

- The Product Pricing by Location Report will be displayed
- Select the market locations that you want to make changes to
- Click the Export to XLSX button to download the tool
- **Very Important Note: We strongly suggest downloading the product pricing by location report for ALL your markets and save for your records as a backup in the event you make pricing errors**

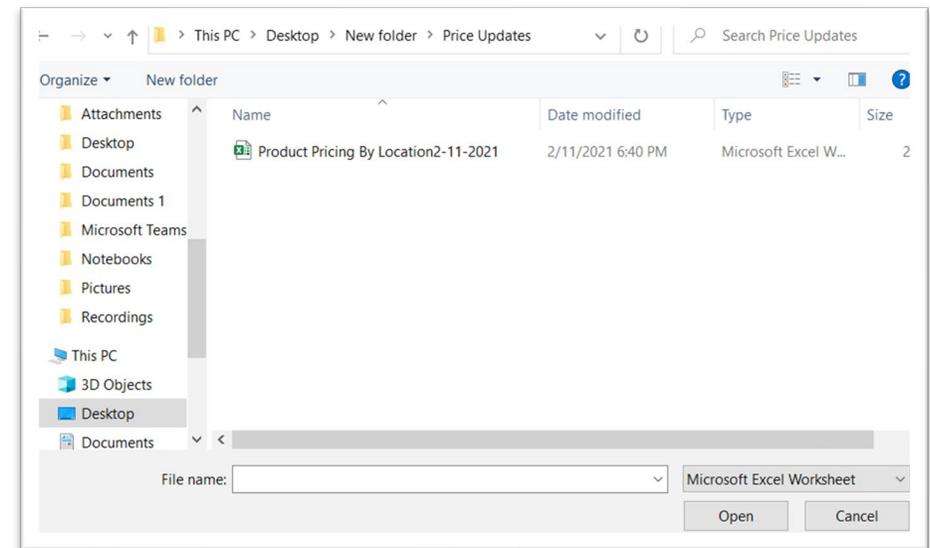
Import Bulk Changes Tool

- Once you have downloaded the spreadsheet it will include full products lists for markets selected
- You can edit the five far right fields on the spreadsheet which include the following
 - Market Cost
 - Market Price
 - Min
 - Max
 - Bulk QTY (Same as EOQ which is a rounding rule)

Product Id	Product Name	Category	Scancodes	Op Code	Cost	Default Price	Market	Market Cost	Market Price	Min	Max	Bulk Quantity
404715	12 oz Coca Cola Classic	Water	4963406, 49634060000	0	0.49	1.39	Nike Bld A	0.38	1.39	9	9	0
404715	12 oz Coca Cola Classic	Water	4963406, 49634060000	0	0.49	1.39	Nike Bld B	0.38	1.39	9	9	0
44830	12 oz Diet Coke	12 OZ CSD	4965802	0	0.44	1.16	Nike Bld A	0.4	0.85	0	0	6
44830	12 oz Diet Coke	12 OZ CSD	4965802	0	0.44	1.16	Nike Bld B	0.4	0.85	0	0	6
404419	12 oz Diet Coke - 2	12 OZ CSD	ttttttt	0	0.44	1.43	Nike Bld B	0.4	0.2	0	0	6
44831	12 oz Diet Mt Dew	12 OZ CSD	9989976	0	0.41	1.43	Nike Bld A	0.37	0.86	0	0	0
44831	12 oz Diet Mt Dew	12 OZ CSD	9989976	0	0.41	1.43	Nike Bld B	0.37	0.99	0	0	0
404421	12 oz Diet Pepsi	12 OZ CSD	01205008, 01235203, 01256905	A1302	0.41	1.43	Nike Bld A	0.41	1.43	0	0	0
44832	12 oz Diet Pepsi	12 OZ CSD	01205009, 01235203, 01256905	0	0.8	1.75	Nike Bld B	0.8	1.59	0	0	0

Bulk Import

- Once you have completed making edits to your import spreadsheet you need to save to your PC
- Before uploading ensure you saved a product pricing by location for ALL of your markets and save as a backup
- Review your work prior to upload
- When you are ready to upload the import spreadsheet please select the Upload button
- After you have clicked the upload button you will be prompted to add the file from your PC
 - Note – This XLSX spreadsheet is locked so no products, rows, or columns can be added & removed
 - Only products already existing at locations can be edited
 - New products cannot be added to the import spreadsheet



Bulk Upload

Products Bulk Update

[Make Bulk Changes](#) Import Bulk Changes

Review Changes

Product Id	Product Name	Category	Scancodes	Op Code	Cost	Default Price	Market	Market Cost	Market Price	Min	Max	Bi
<input type="text" value="Search"/>												
44830	12 oz Diet Coke		04965802	0	0.44	1.16	Nike Blid A	0.4	0.85	5	2	6
774582	12oz Diet Coke Ginger Lime		049000075090		0.54	2.83	Nike Blid A	0.49	1.29	4	0	0

- After you have uploaded the import sheet you will be presented with the product list to review
- If you have any errors, they will automatically be displayed and will highlight the issues in red
- In the example displayed there are two errors due to the min par levels being higher than the max par
- The min max par levels need to be corrected on the import spreadsheet and re-imported

Import changes to 2 product(s) in 1 location(s)

There was a problem with 2 product in your import file. Please import and try again.

Validation Key

- Black** No Changes
- Green** Changes OK
- Grey** Field can't be bulk modified
- Red** Errors

Show products with errors

- Please note the Validation Key after you upload your spreadsheet
- **Black text:** No changes made to product
- **Grey text :** Fields cannot be edited
- **Red Highlights:** Errors – Need to be corrected
- **Green Highlights:** Successful changes

Bulk Upload

Review Changes

Product Name	Category	Scancodes	Op Code	Cost	Default Price	Market	Market Cost	Market Price	Min	Max	Bulk Quantity
12 oz Coca Cola Classic		4963406,49634060000	0	0.49	1.39	Nike Bld A	0.38	1.49	7	14	0
12 oz Coca Cola Classic		4963406,49634060000	0	0.49	1.39	Nike Bld B	0.38	2.49	7	14	0
12 oz Diet Coke		04965802	0	0.44	1.16	Nike Bld A	0.47	0.99	7	14	6
12 oz Diet Coke		04965802	0	0.44	1.16	Nike Bld B	0.47	0.99	7	14	6
12 oz Diet Coke - 2		ttttttt	0	0.44	1.43	Nike Bld B	0.47	0.2	7	14	6
12 oz Diet Mt Dew		9989976	0	0.41	1.43	Nike Bld A	0.37	0.86	7	14	0
12 oz Diet Mt Dew		9989976	0	0.41	1.43	Nike Bld B	0.37	0.99	7	14	0
12 oz Diet Pepsi		01205008,01235203,01256905	A1302	0.41	1.43	Nike Bld A	0.41	1.43	7	14	0
12 oz Diet Pepsi		01205008,01235203,01256905	0	0.8	1.75	Nike Bld B	0.8	1.50	7	14	0

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Import changes to 13 product(s) in 2 location(s)

Validation Key
Black No Changes
Green Changes OK
Grey Field can't be bulk modified
Red Errors

APPLY CHANGES CANCEL

Show products with errors

- When you upload your spreadsheet and there are no errors, you will be displayed with the green successful product changes
 - This example shows successful changes made to cost, price, and min/max par levels
- Review all your changes to ensure they are correct
- Click on the "Apply Changes" button
- You will be presented with a warning message informing you all updates are final
- You will be presented with a second pop up message that will display the number of products and locations changes were made
- Click OK to submit the changes
- Process is complete
- **Note: Spot check your work when you have completed your changes to ensure no mistakes were made**

Apply Bulk Import X

All updates are final. Please confirm to apply the import changes.

CANCEL OK

Apply Bulk Import X

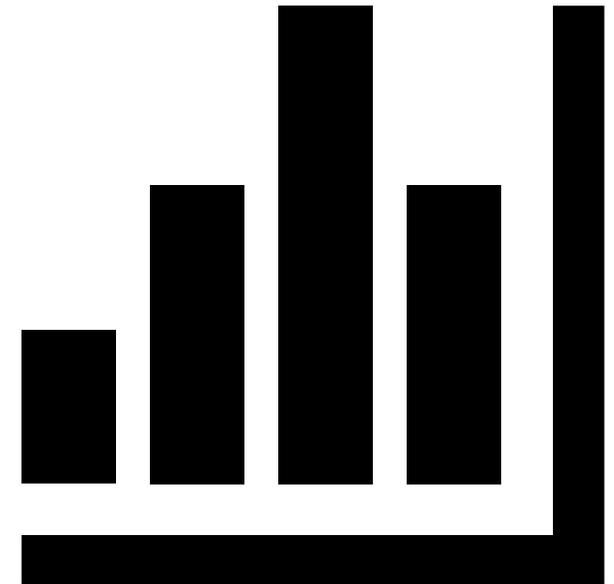
Changes Requested for 13 Products in 2 Locations on February 12, 2021

Changes will be applied on February 13, 2021

OK

Product Management Recap

- **Single product edits** – Go to the master product record to edit the fields you want changed and use the Update Extend or Update Existing options to update multiple locations
 - **Single location Product Edits** – Go to the market location records and select the Products button. Adjust the fields highlighted in orange text and select the save button
 - **Legacy Bulk Update Tool** – Should be used in limited scenarios.
 - Should only be used to update price or cost for a single product category
 - Ensure your team knows how to use this tool
 - Example: Updating selling price to a product category for a single customer that has a few market locations such as Nike Bld A, Bld B, and Bld C
 - **New Product Import Tool** – Best used for updating price, cost, min/max, and EOQ to multiple market locations
- Use the correct tool to complete your task



Summary

- Ensure your team members have access to the Help Center giving them access to the training content such as the product import pricing tool and other features
- The Import Product Pricing Import Tool is available in AMS today
- Download and save the XLSX Product Pricing by Location spreadsheet for ALL your markets periodically and prior to making any product updates
- This tool will not work with VMS integrated markets
- Be sure your team is properly trained before using these tools



Avanti Markets Help Center



- **Are Your Team Members Registered?**
- Contact support for assistance getting access to the HELP CENTER
- Create, track, update your support ticket status activity
- Help Center Materials
 - How to training materials
 - Security and network requirements
 - Sales and Marketing
 - Avanti Features
 - Industry News
 - Covid – 19 resources