

Heartland

Global Inventory Changes

Rev 09/2019

Cash
Register
Express

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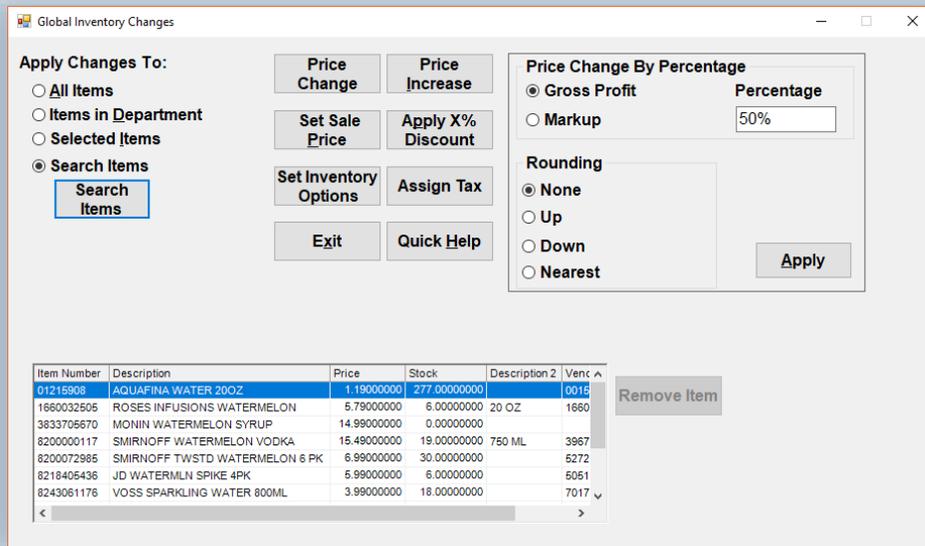
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Revision History

| Doc Version | Date | Author | Description of Changes |
|-------------|------------|--------|--|
| 1.0 | 02/09/2010 | RH | 1st Release |
| 1.1 | 12/01/2015 | MP | Updated Header |
| 1.2 | 06/09/2017 | MP | Updated Screenshots of UI |
| 1.3 | 08/03/2017 | MP | Includes Changes for version 12.8020, Price changes by Profit or Markup Percentage |
| 1.4 | 09/20/2019 | BG | Added Set Inventory Options and Search Items functions. |

Overview

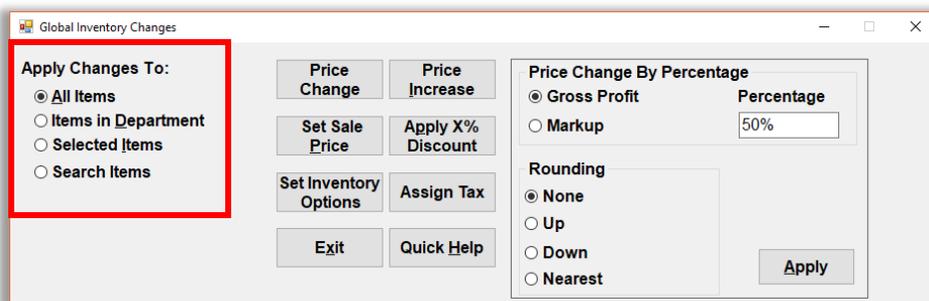
This guide will help you successfully navigate CRE's **Global Inventory Changes** feature, which enables you to make changes to the pricing of all items, items in a specific department, or a group of individually selected items, in one efficient action. Some changes are permanent, whereas others expire outside a provided date range.



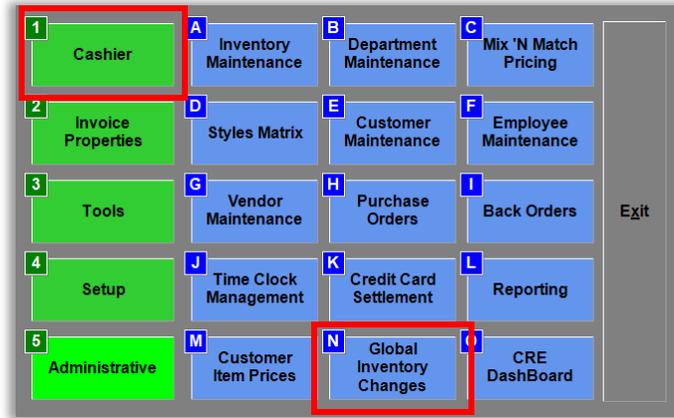
NOTE: Given the scope and the irreversibility of changes made during this process, we strongly recommend first making a backup of your database. To facilitate this process, as of version 13.1001, CRE will prompt you to perform this action before it effects any changes. If you are running an older version of CRE, you must initiate the backup process manually before using Global Inventory Changes. You can find instructions for this process [here](#).

Selecting Inventory Items

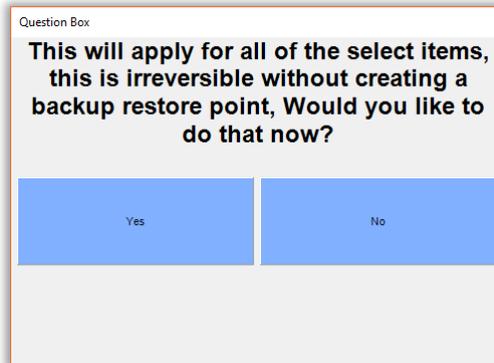
To begin the Global Inventory Changes process, select the inventory items that are to be changed.



- 1 Click Administrative, then Global Inventory Changes.

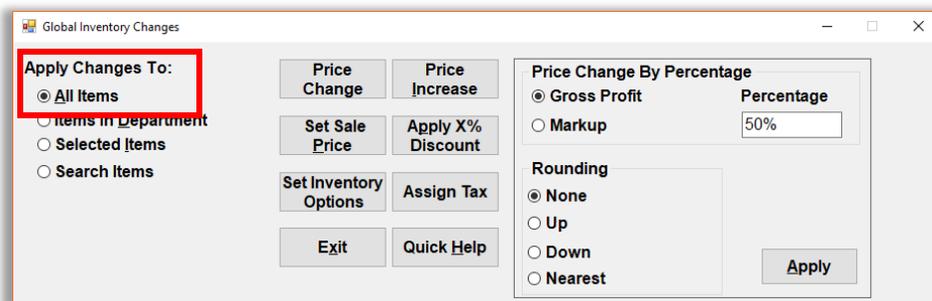


- 2 Answer the database backup prompt (only in version 13.1001 and later). **Yes** is recommended.

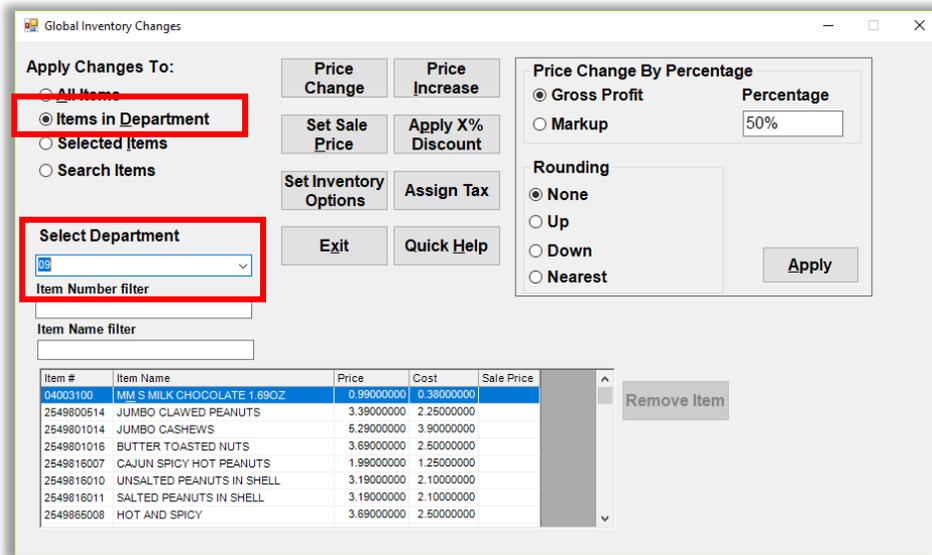


As noted in the overview, you can backup your database manually by following the steps in [this document](#).

- 3 At the Global Inventory Changes screen, to start the process, make your selection under **Apply Changes To:**
 - ▶ **All Items** will apply changes to all inventory items.

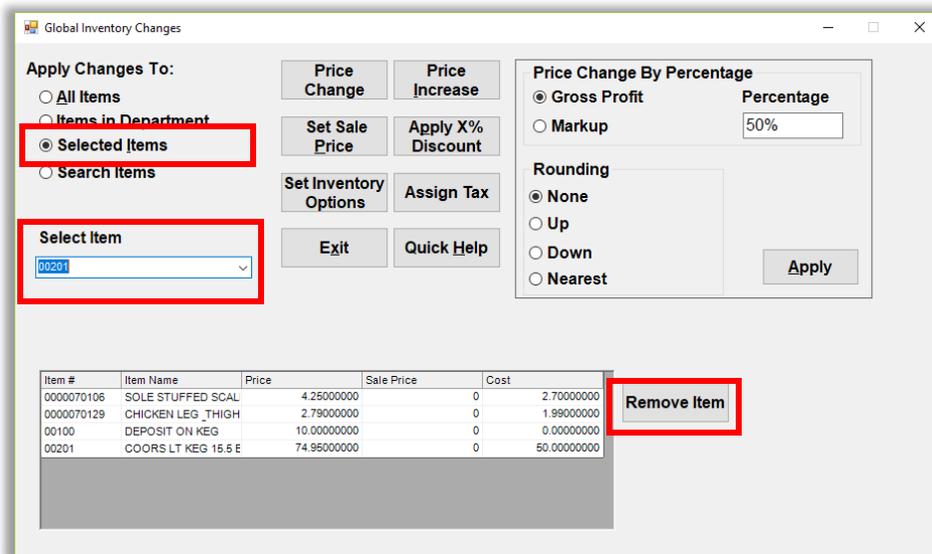


- ▶ **Items in Department** allows you to select a department from a list and apply changes to all items therein.



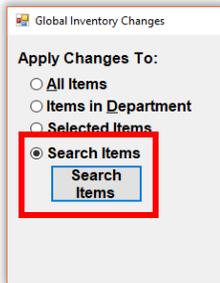
You can remove an item from the list by highlighting it and pressing **Delete** on your keyboard.

- ▶ **Selected Items** allows you to select items from a list, and will apply changes to any selected item(s).



You can remove an item from the list by highlighting it and clicking **Remove Item**.

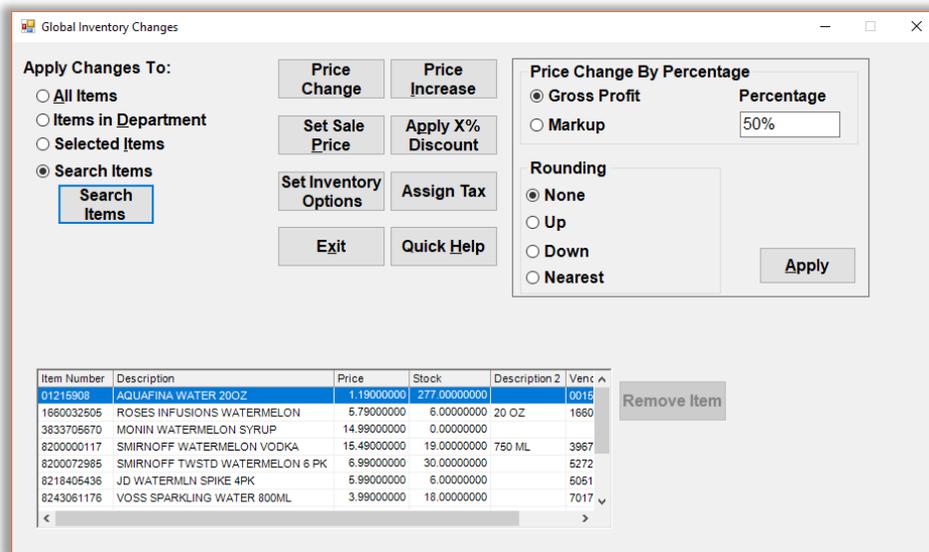
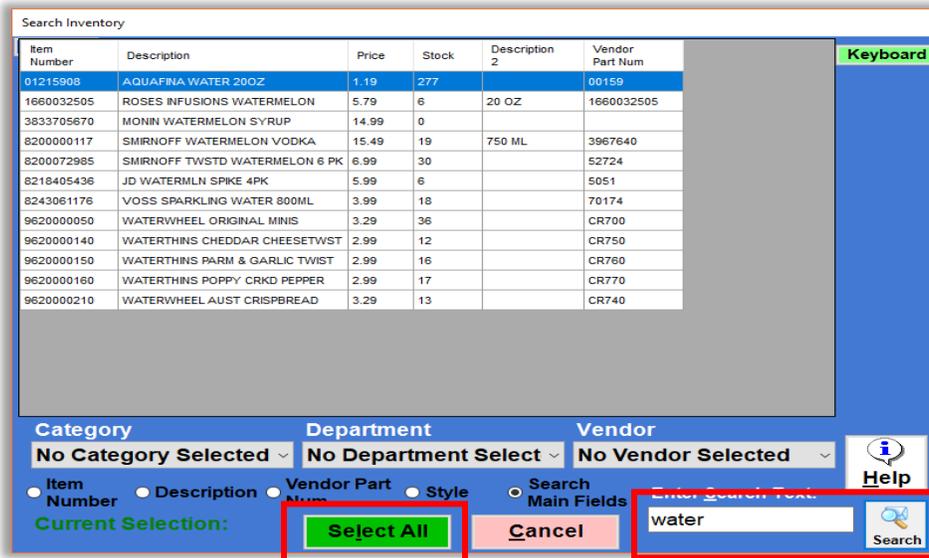
- ▶ **Search Items** will allow you to type search criteria, and to then select from the list of matching items.



If you select **Search Items**, a **Search Items** button will appear. Click it to open the Search Inventory window.

Enter desired value in the **Enter Search Text** box, and click **Search**.

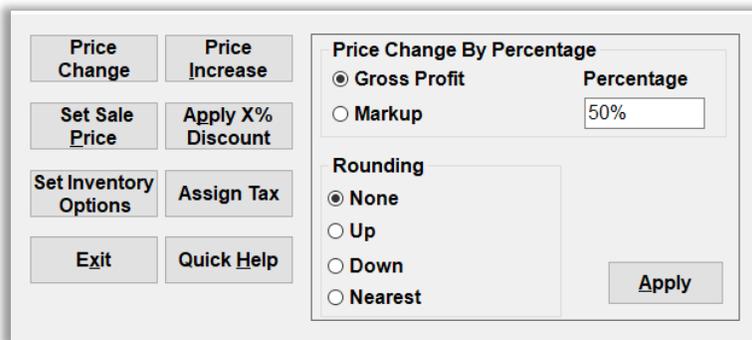
Click **Select All** to add search results to the Global Inventory Changes page.



Once your list of items is ready, proceed to the next section.

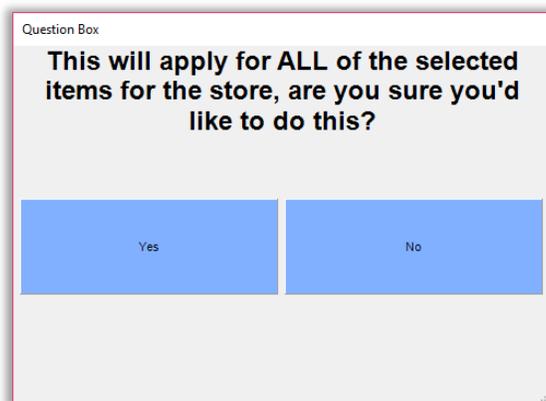
Global Inventory Changes

Now that you've selected the inventory items to be edited, we are ready to select the type of change to effect.



The screenshot shows a dialog box with several sections. On the left, there are buttons for 'Price Change', 'Price Increase', 'Set Sale Price', 'Apply X% Discount', 'Set Inventory Options', 'Assign Tax', 'Exit', and 'Quick Help'. On the right, there is a section titled 'Price Change By Percentage' with radio buttons for 'Gross Profit' (selected) and 'Markup', and a text input field for 'Percentage' containing '50%'. Below this is a 'Rounding' section with radio buttons for 'None' (selected), 'Up', 'Down', and 'Nearest'. An 'Apply' button is located at the bottom right of the dialog.

Regardless of selection, CRE will display the following confirmation prompt, which you should answer appropriately:



The screenshot shows a 'Question Box' with the text: 'This will apply for ALL of the selected items for the store, are you sure you'd like to do this?'. Below the text are two blue buttons labeled 'Yes' and 'No'.

In the pages that follow, we cover all of the available changes and an explanation of how to use them.

Price Change

CRE will display a simple prompt for new price:

Enter new price

\$0.00

| | | |
|---|---|-----|
| 7 | 8 | 9 |
| 4 | 5 | 6 |
| 1 | 2 | 3 |
| . | 0 | +/- |

Clear Cancel

OK

Enter desired price and click **OK**. CRE will display a confirmation message when the changes are complete.

Set Sale Price

CRE will prompt you for a sale price and start/end dates for sale.

Enter sale price

\$0.00

| | | |
|---|---|-----|
| 7 | 8 | 9 |
| 4 | 5 | 6 |
| 1 | 2 | 3 |
| . | 0 | +/- |

Clear Cancel

OK

Info Prompt

Please enter the start date of the sale

OK Cancel

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Info Prompt

Please enter the end date of the sale

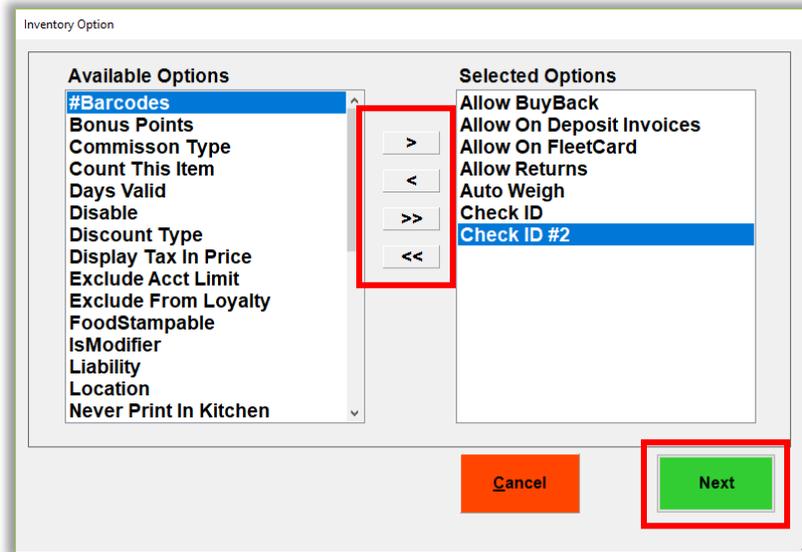
OK Cancel

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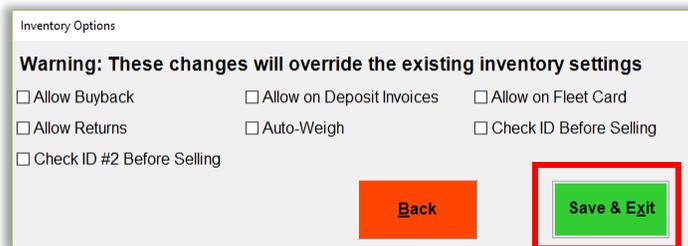
CRE will display a confirmation message when the changes are complete. All selected items will be changed to reflect the new price while the sale is in effect.

Set Inventory Options

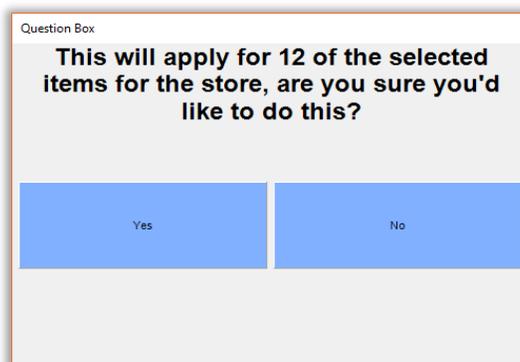
- 1 Make your selections from the **Available Options** box the left, and move them to the **Selected Options** box with the single right-pointing arrow. If you wish to select all options, click the double right-pointing arrow button. When finished, click **Next**.



- 2 Make changes as appropriate and click **Save & Exit** to commit your changes.



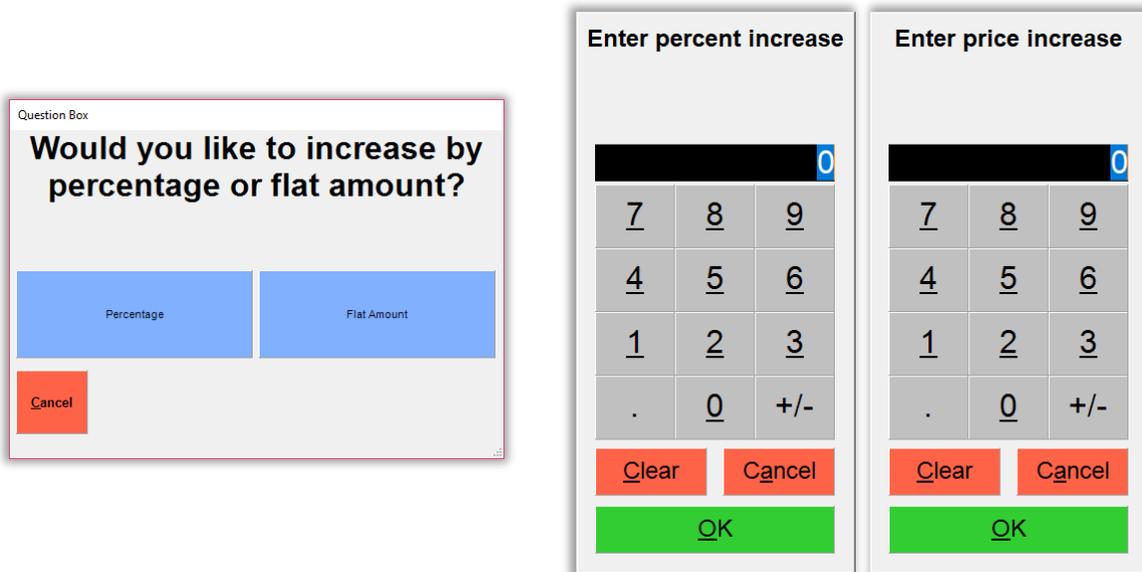
PLEASE NOTE: All options in screen are disabled by default, regardless of items' prior statuses, and that leaving any boxes unchecked will result in the associated option being turned off.



- 3 Answer **Yes** to the confirmation prompt to complete the process.

Price Increase

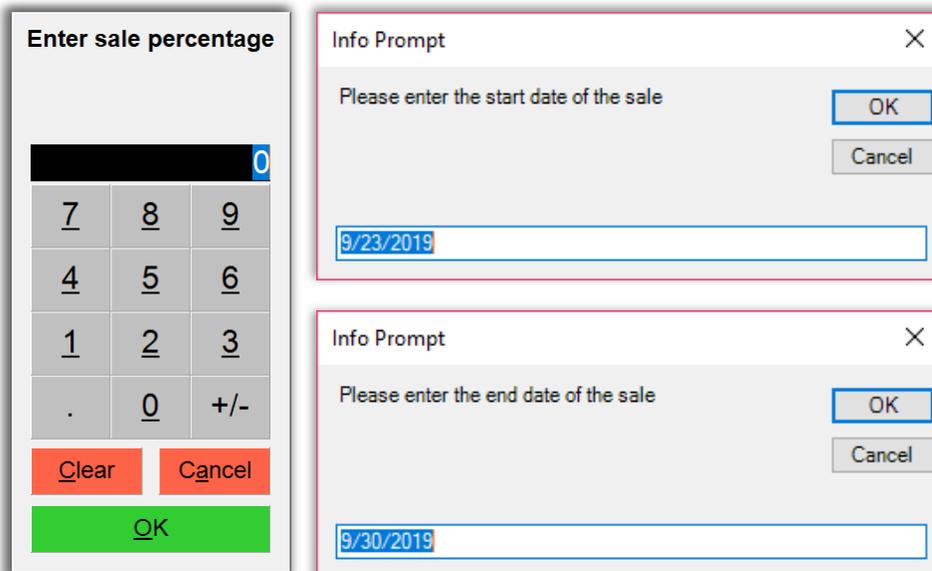
CRE will prompt you to select **Percentage** or **Flat Amount**., and will then prompt you for values based on that selection.



CRE will display a confirmation message when the changes are complete.

Apply % Discount

CRE will prompt you for the sale percentage (amount to be subtracted) and start/end dates for sale.



CRE will display a confirmation message when the changes are complete. The discount will be applied to all selected items while the sale is in effect.

Assign Tax

You will be asked to select which tax rate you want to apply or remove from the selected items. Versions 12.8030 and later allow you to select multiple rates. In this example, we have selected Tax3, Tax4 and Bar Tax.

Please select tax rates you like to change

| | | | | |
|-----------------|----------------|----------------|-----------------|-----------------|
| Tax1 7.000% | Tax2 0.000% | Tax3 0.000% | Tax 4 5.000% | Tax 5 0.000% |
| Tax 6 0.000% | Bar Tax | | | |

Cancel **Select**

After you select the tax rate(s) and click **Select**, CRE will ask whether to **Charge** or **Not Charge** the selected taxes.

Question Box

Would you like to charge or not charge the taxes you selected?

| | |
|--------|------------|
| Charge | Not Charge |
|--------|------------|

- ▶ **Charge:** All selected tax rates will be enabled, and all other tax rates will be disabled, regardless of previous configurations.
- ▶ **Not Charge:** All selected tax rates will be disabled, and all other tax rates will be enabled, regardless of previous configurations.

CRE will display a confirmation message when the changes are complete.

Price Change by Percentage

Global Inventory Changes can update the price of items based on either the gross profit percentage or a markup percentage.

NOTE: In order to use this feature, you **must** have **Cost amount** defined for affected inventory items. This can either be set up in one of two ways.

Average Cost Method: CRE automatically calculates the cost of the item. To learn more about this process, please read the [inventory section](#) of the [setup screen guide](#).

Manual Cost Method: In order to use this method, you must disable the Average Cost Method in the setup screen, and then manually enter the amount of the cost for each item in inventory maintenance. To learn more about this process, please read the [inventory maintenance guide](#).

- After following the steps [above](#) to select the items you want to apply the price changes too, select either **Gross Profit** or **Markup**.
 - The formula used for **Gross Profit** is: $\text{Global Inventory Price} = \text{cost} \times (1 + \text{profit in decimal})$
Gross Profit on an item that costs \$1.00 would result in a selling price of \$1.40 (cost x 40%) with a profit of \$0.40.
 - The formula used for **Markup** is: $\text{Global Inventory Price} = \text{cost} / (1 - \text{markup in decimal})$
 A 40% **Markup** on an item that costs \$1.00 would result in a selling price of \$1.66 (\$1.66 x 40%) with a profit of \$0.66.

- Select the type of **Rounding** to be included in the price change, or select **None** if rounding is not preferred.
 - Up** will round to the next higher matching amount
 - Down** will round the next lower matching amount
 - Nearest** will round to nearest matching amount

- If rounding, select the **Round To** amount, and click **Apply**.
- Answer **Yes** to confirm changes.
- Wait for CRE confirmation prompt that changes are complete and, if desired, check inventory maintenance to verify that the new prices have been applied to the items.