FasTraxPOS

Cost and Price Import Guide

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Overview of Cost and Price Import

Using the Cost and Price Import tool is a simple, fast way to import all prices and/or costs to a **Pricebook Zone** from a specific vendor.

This can be performed as needed, and serves to view costs changed by a vendor before actually receiving an invoice. This assists in utilizing the **Alternate Vendor** feature within the ordering system for comparing item costs.

1. **Import Data From File** – the file location and name
2. **Import Price/Cost** – imports both price and cost
3. **Import Price** – imports price
4. **Pricebook Zone For Import** – choose the **Pricebook Zone** to be updated
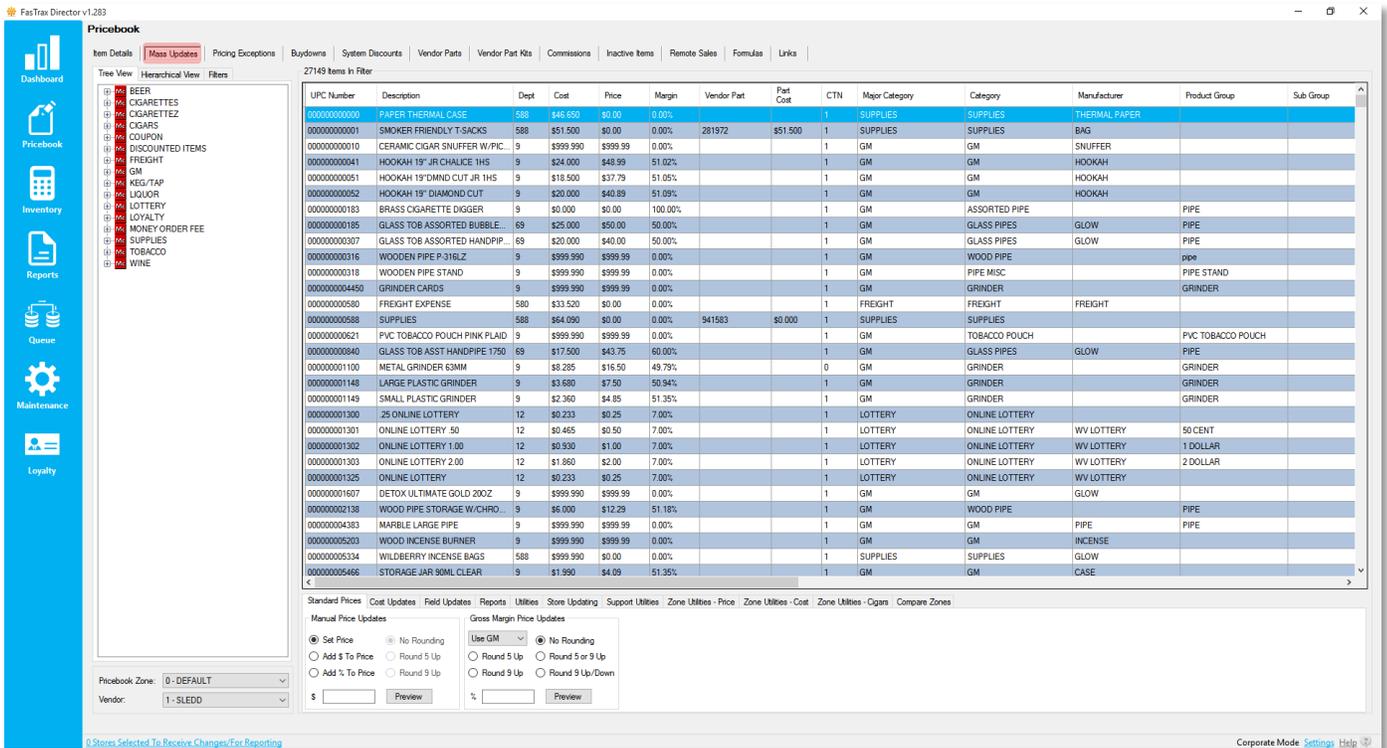5. **Vendor For Import** – choose the applicable Vendor to be updated

> This should only be performed at corporate. Remember to manually send down changes to stores, as a queue record will not be created by the import

Importing Cost and Price

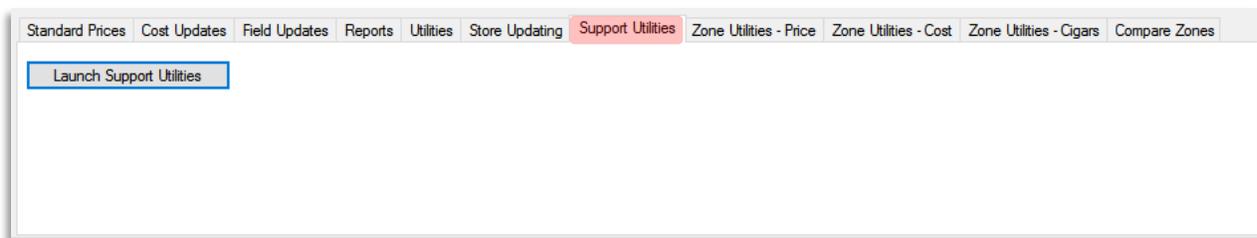1. After logging into **Director**, choose the **Pricebook** module.
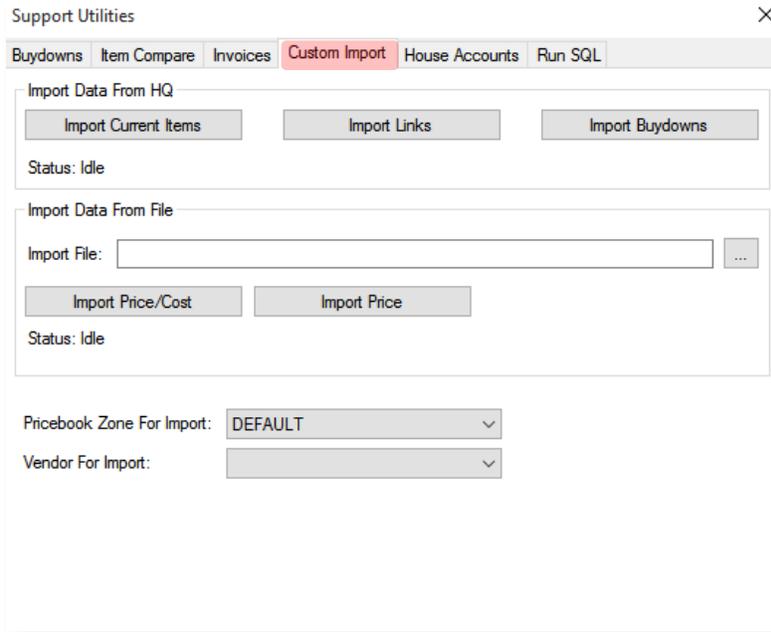

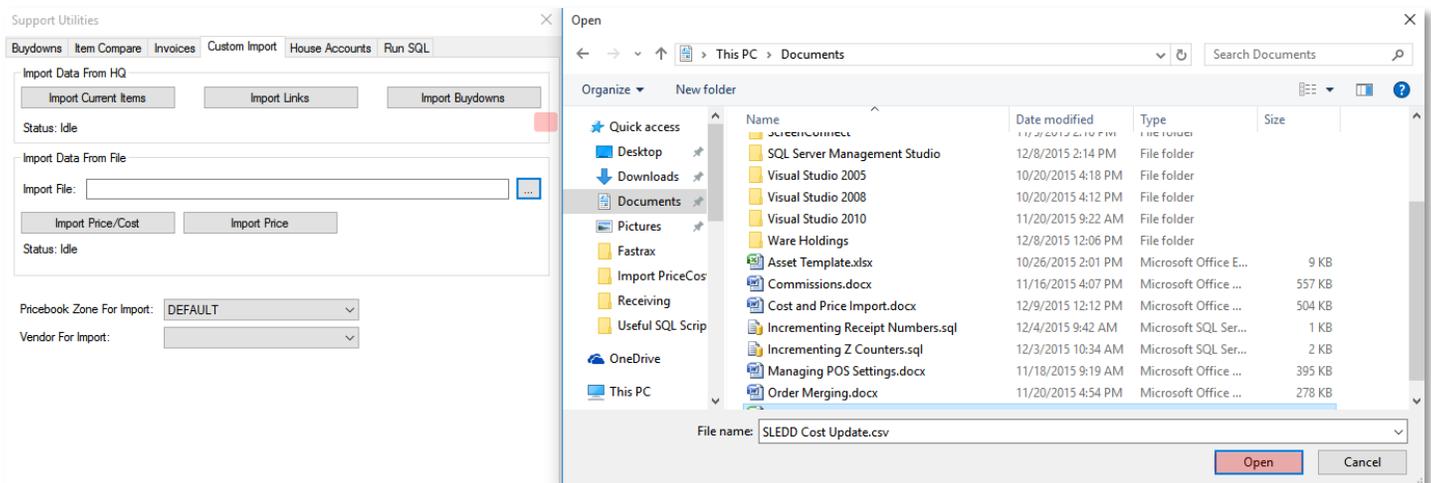2. Within **Pricebook** choose the **Mass Updates** tab

3. In the tabs below the item grid, choose **Support Utilities**, then click **Launch Support Utilities**

4   Choose **Custom Import** from the window that opens

5.   Choose the file supplied by your vendor on your computer after clicking the **...** button then **Choose** the CVS file to be imported

6. Choose the **Pricebook Zone For Import** and **Vendor For Import** from their applicable dropdowns
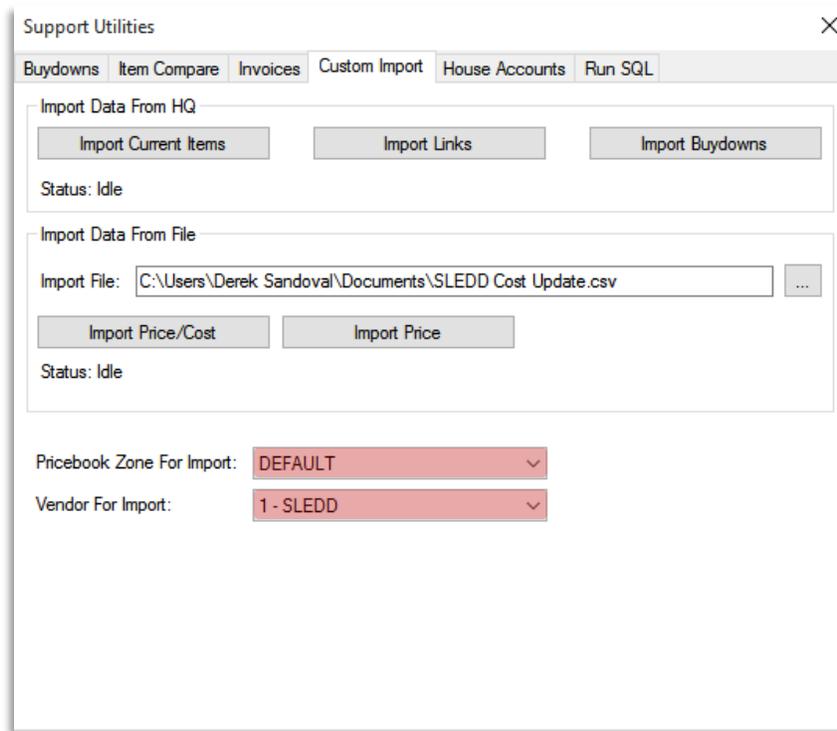
7. Choose either **Import Price/Cost** to update the cost and retail price or **Import Price** to update just retail price

There is no undo for this, so make sure that you check the file thoroughly and the options selected before choosing to import.

File Format Requirements

1. The file will need to be in **CSV** format, otherwise known as **Comma Separated Values**.

A file in CSV format will have a .csv file extension. These types of files can be opened in Notepad and Excel. An Excel file has the option to be saved in a CSV format.

2. The following values will be used for **Cost and Price** imports:

UPC,Cost,Price

3. The following values will be used in **Price** imports:

UPC,Price