



Item
Maintenance
Guide

INDEX

How to Add and Edit an Item	1
How to Add a UPC	2
How to Add a Promotion	3
How to Add a Vendor Part	4
Price Lists	5
Terms	6
Item Details	7
Mass Updates	8
Stamps	11

How to Add a New Item

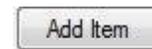
- 1) Open the FasTrax Warehouse program
- 2) Select your user name and enter your password



- 3) On the left side of the Warehouse screen, select the Item Maintenance icon



- 4) To add a new item, click the Add Item button located at the lower right

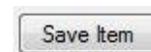


- 5) In the General Information section, type the Item Number, Description, and select the Product Line for the item you are adding

- 6) Under Cost Information enter your Last Cost, Manufacturer List Cost, Default Price, and the MSRP

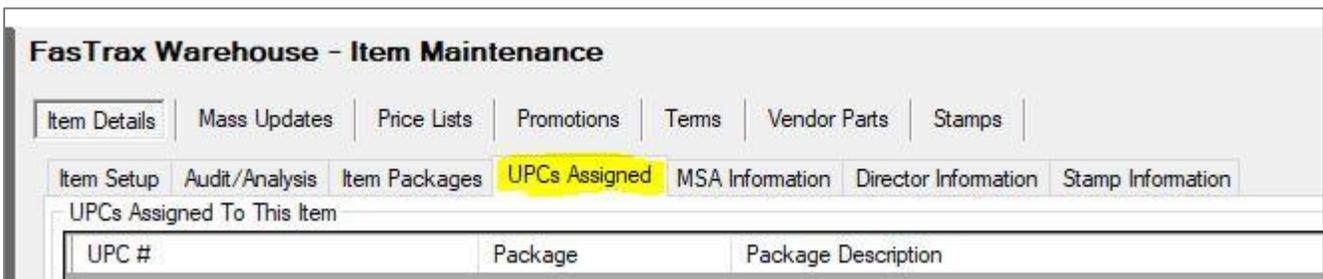
- 7) Under MSA Information section, add any MSA information to the item that it is needed

- 8) Select the Save Item button at the bottom right

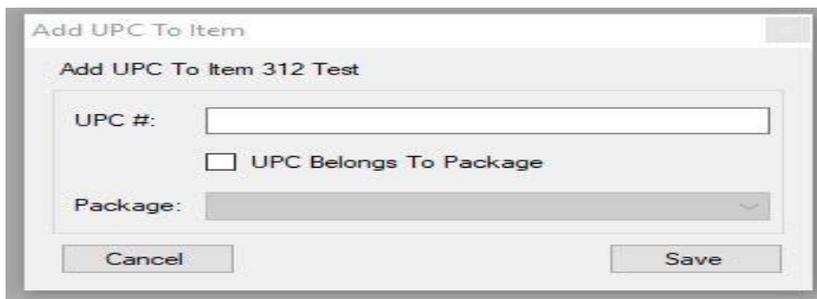


How to Add a UPC to an Item

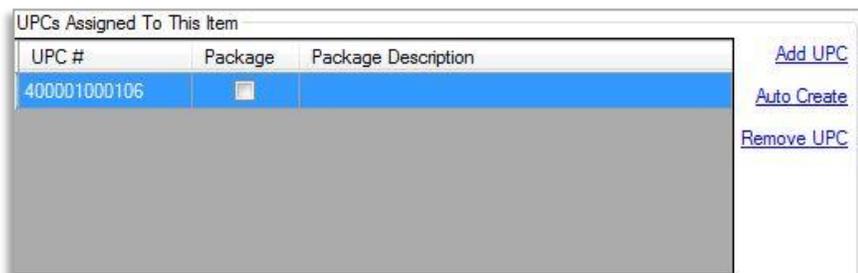
- 1) From Item Maintenance, Locate UPCs Assigned tab



- 2) Click the Add UPC button at the bottom right of the page
- 3) Enter the UPC for the item and click Save



- 4) Now the UPC shows up in the UPCs Assigned To This Item box



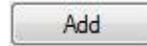
If the item does not have a UPC and you need to create one, you can click the Auto Create link to automatically generate a UPC for the item. This will generate a pop up box to let you know the UPC # was created. The new UPC will show in the UPCs Assigned To This Item box.

If there is a UPC that is no longer valid for the item you can highlight the UPC and click on the Remove UPC link.

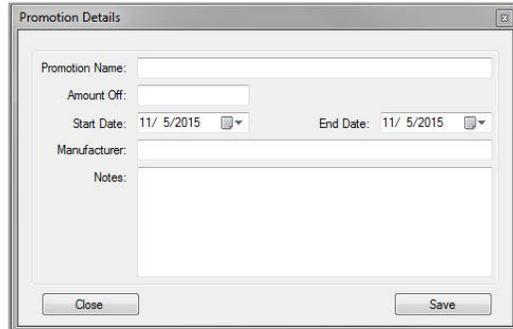
Once you remove the UPC you will need to refresh the screen for it to show the UPC has been removed from that item.

How to Add a Promotion

- 1) From the Promotions tab, click the Add button

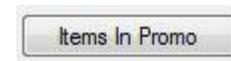


- 2) Name the promotion, assign the amount to be discounted, and set the running date of the promotion.

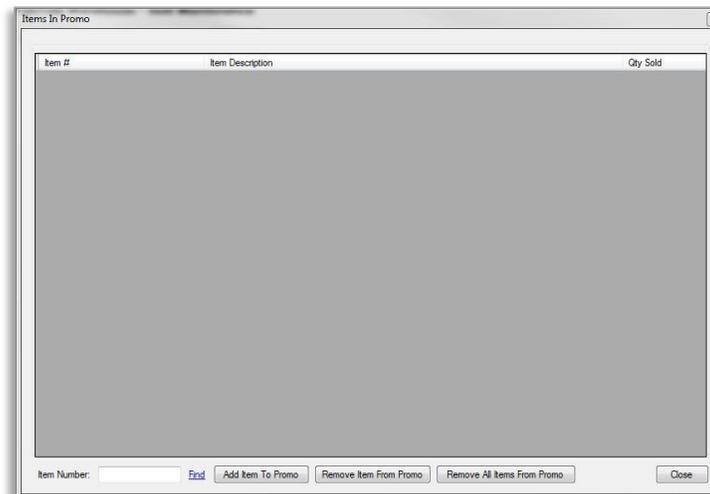
A dialog box titled "Promotion Details" with a close button in the top right corner. It contains several input fields: "Promotion Name:" with a text box, "Amount Off:" with a text box, "Start Date:" with a date picker set to "11/ 5/2015", "End Date:" with a date picker set to "11/ 5/2015", "Manufacturer:" with a text box, and "Notes:" with a larger text area. At the bottom, there are "Close" and "Save" buttons.

- 3) Click Save

- 4) Highlight the promotion you just created; click Items In Promo

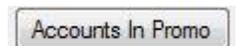


- 5) Enter the item number you want to add and click Add Item To Promo

A dialog box titled "Items In Promo" with a close button in the top right corner. It features a table with three columns: "Item #", "Item Description", and "Qty Sold". The table area is currently empty. Below the table, there is an "Item Number:" input field with a "Find" button next to it. To the right of the input field are three buttons: "Add Item To Promo", "Remove Item From Promo", and "Remove All Items From Promo". A "Close" button is located at the bottom right of the dialog.

- 6) Once you enter all the items for the promotion, click close

- 7) Now click Accounts In Promo to add customers who will receive the promotion



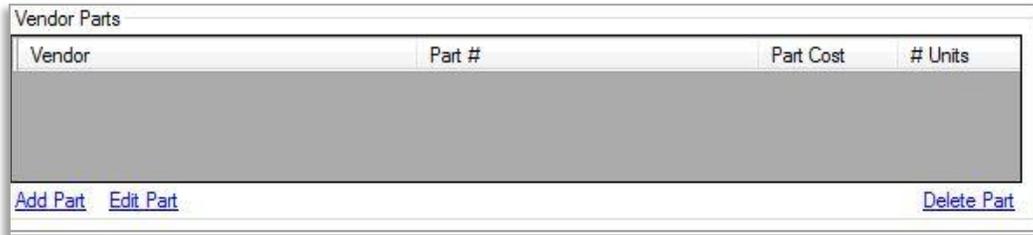
- 8) There are 3 options to adding accounts
 - a) Add a single account
 - b) Add an account group
 - c) Add all accounts

A dialog box for adding accounts. It has two rows of input fields. The first row has "Account:" with a dropdown menu showing "A Clause Distributing", a magnifying glass icon, and "Add Account" and "Add All" buttons. The second row has "Account Group:" with a dropdown menu showing "FTX Stores" and an "Add Group" button.

- 9) Once all accounts are added for the promotion click Close

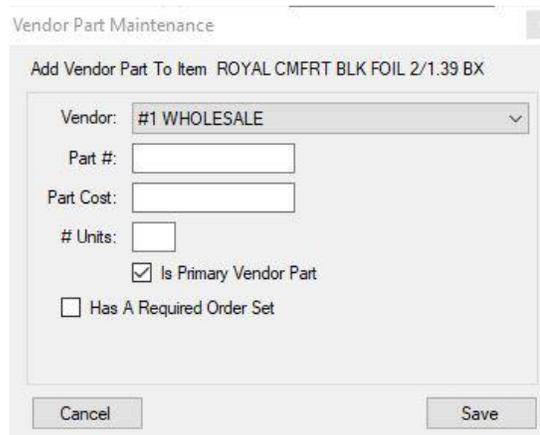
How to Add a Vendor Part

- 1) From the Item Details tab, type in the item number that you want to create a vendor part for
- 2) Under Vendor Parts on the bottom right, click Add Part



The screenshot shows a window titled "Vendor Parts" containing a table with the following columns: Vendor, Part #, Part Cost, and # Units. Below the table are three buttons: "Add Part" (underlined), "Edit Part" (underlined), and "Delete Part" (underlined).

- 3) Enter the Vendor, Part #, Part Cost, and the # of Units



The screenshot shows a dialog box titled "Vendor Part Maintenance" with the subtitle "Add Vendor Part To Item ROYAL CMFRT BLK FOIL 2/1.39 BX". The form contains the following fields and options:

- Vendor: #1 WHOLESALE (dropdown menu)
- Part #: [text input field]
- Part Cost: [text input field]
- # Units: [text input field]
- Is Primary Vendor Part
- Has A Required Order Set

At the bottom of the dialog are "Cancel" and "Save" buttons.

- 4) Click Save

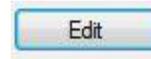
An alternative way to create Vendor Parts:

- 1) From Item Maintenance go to the Vendor Parts tab
- 2) Click Add Part
- 3) Enter the Item # for the item you are creating the vendor part for
- 4) Press enter
- 5) Select the Vendor
- 6) Enter the Vendor Part #
- 7) Click Save Part

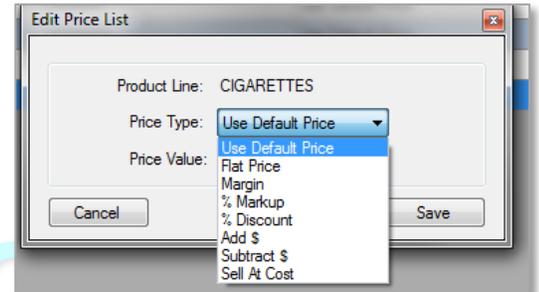
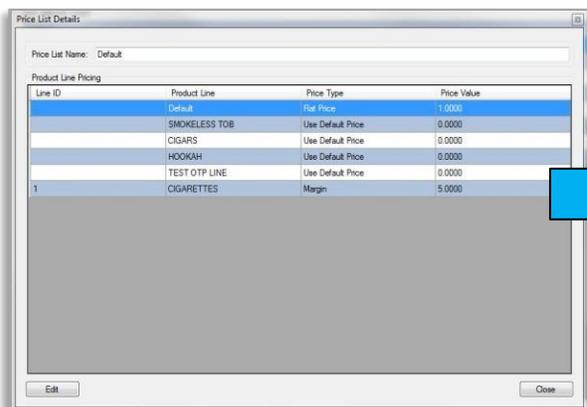
Price Lists

Price lists are a way to set how you charge customers for a product line based on how the price type is set up.

- 1) From the Item Maintenance click on the Price Lists tab
- 2) Click Add
- 3) Enter the name for the new price list
- 4) Highlight the price list you created and click Edit



- 5) Select the product line you want to set and click edit



- 6) Select the price type to be assigned

- 7) Set the value for the price type (if you selected default price or sell at cost, skip this step)



- 8) Click Save
- 9) Continue until you have all product lines complete
- 10) When finished click Close

Terms

Terms allow you to give select customers discounts on certain items

- 1) From Item Maintenance, choose Terms and click add
- 2) Give it a name and set the amount off
- 3) There are two discount types - Dollars Off and Percent Off

Terms Details

Terms Name:

Amount Off:

Discount Type: Dollars Off ▼

Notes:

Close Save

- 4) Click Save
- 5) Now add items by clicking the Items In Terms
- 6) From here you can enter the item number to add or click find to search for the item
- 7) Click Add To Terms once you have the number entered
- 8) To add customer to the Term, click Accounts In Terms
- 9) From here you can add a single account, an entire account group, or all accounts.
 - a) To add an account, select the account and click Add Account
 - b) To add groups, select the group and click Add Group
 - c) The Add All button will add all accounts to the Terms

Items In Terms

Item #	Item Description
000	Vendor test
008218400346	JACK DANIEL'S TENNESSEE HONEY - 375
008982000063	TECATE 6 PK CN
011711751211	ROYAL BALI 12/5 CT EA
012300112130	WINSTON BX
018200005374	BUD 16oz 6PK CAN

Item Number: Find Add Item To Terms Remove Item From Terms Remove All Items From Terms Close

Accounts In Terms

Account Name	Account Group
FasTrax Store 1	FTX Stores
FasTrax Store 10	FTX Stores
FasTrax Store 11	FTX Stores
FasTrax Store 12	FTX Stores
FasTrax Store 14	FTX Stores
FasTrax Store 15	FTX Stores
FasTrax Store 16	FTX Stores
FasTrax Store 17	FTX Stores
FasTrax Store 18	FTX Stores
FasTrax Store 2	FTX Stores
FasTrax Store 3	FTX Stores
FasTrax Store 4	FTX Stores
FasTrax Store 6	FTX Stores
FasTrax Store 7	FTX Stores
FasTrax Store 8	FTX Stores
FasTrax Store 9	FTX Stores
Jeff Samona	FTX Stores

Account: A Clause Distributing Add Account Add All

Account Group: FTX Stores Add Group

Remove All Remove Account Close

Item Details

1) Audit / Analysis

a) Audit Information shows when the item was created and the last time it was updated

b) Analysis

i) Order History shows all orders that have the item on it

ii) Purchase History shows all purchase orders that the item is on

iii) Change History shows when the price has changed on the item

iv) Adjustments show any adjustments that have been done on the item

2) Item Packages are used if you are selling partial item. For example, if you sell individual packs from cartons:

a) Click add package

b) Enter an item number for the package

c) Enter a package description

d) Enter the default retail and MSRP

e) Select if it is a partial or full package type

f) Enter the number of units in the package

g) Click Save

For a partial package, the number of units in package is how many is in the main item. In this example there are 10 packs in one carton therefore the # units in package is 10.

Package Details

Package Details For Item WINSTON BX

Package Item Number: 012300000123

Package Description: WINSTON BX

Default Retail: 4.51

MSRP: 4.51

Package Type: Partial

Units In Package: 10

Print Label:

Locations (If blank, base item location is used)

Section

Aisle

Bay

Shelf

Bin

Location 6

Location 7

Location 8

Location 9

Overstock

Cancel Save

Mass Updates

In Mass Updates, you can make changes to multiple items at one time

The screenshot displays the 'FasTrax Warehouse - Item Maintenance' application. The main window shows a list of 4,251 items. The table columns include Analysis, Item #, Description, Last Cost, Avg Cost, and Manuf Cost. The right sidebar shows item details for Item #: 000, including sales data for various months. The bottom of the window features several update tabs: Price Changes, Cost Changes, Field Updates, Utilities, Add Utilities, Pricebook Zones, Stamps, and Reports. The 'Price Changes' tab is selected, showing options for Manual Price Updates, Gross Margin Price Updates, and MSRP Update.

Caution

Any Item that is in the middle window of mass updates will be affected by any changes made. Be sure to filter to just the items you want to change.

There are eight tabs in Mass Updates:

- 1) Price Changes - Change the price, gross margin / markup, or set the manufacturer suggested retail price for items

Price Changes Cost Changes Field Updates Utilities Pricebook Zones

Manual Price Updates

Set Price Add \$ To Price Add % To Price

No Rounding Round 5 Up Round 9 Up

Gross Margin Price Updates

Use GM No Rounding Round 5 Up Round 5 or 9 Up Round 9 Up Round 9 Up/Down

Base Cost On: Last Cost

MSRP Update

Set MSRP

\$ Preview

% Preview

\$ Preview

The preview screen lets you see the old (current) price and what the new price will be.

6 Items

	Last Cost	Avg Cost	Manuf Cost	MSRP	Default Retail	QOH
NT ...	\$22.44	\$0.000	\$22.44	\$26.45	\$23.00	46,000
SLV...	\$32.04	\$0.000	\$32.04	\$37.77	\$32.84	22,000
2	\$24.96	\$0.000	\$24.96	\$29.42	\$25.58	16,000
N S...	\$22.44	\$0.000	\$22.44	\$26.45	\$23.00	38,000
SLV...	\$24.24	\$0.000	\$24.24	\$28.57	\$24.84	8,000
	\$20.00	\$0.000	\$20.00	\$23.58	\$20.50	6,000

Item #: MIS5484

Qty On Order:

Qty Reserved:

Days Left:

MTD Sales:

June Sales:

Change Preview

6 Items To Be Updated

Item	Description	Cost	Old Price	Old Margin	New Price	New Margin
MIS5484	MISSOURI AMERICAN ASRTMENT SLV...	\$22.44	\$23.00	2.43%	\$29.99	25.18%
MIS6782	MISSOURI #1000 WASHINGTON SLV/...	\$32.04	\$32.84	2.44%	\$29.99	0.00%
MIS7628	MISSOURI #690 LEGEND SLV/12	\$24.96	\$25.58	2.42%	\$29.99	16.77%
MIS7813	MISSOURI COUNTRY GENTLMAN SLV...	\$22.44	\$23.00	2.43%	\$29.99	25.18%
MIS8475	MISSOURI #2000 OZARK MTN SLV/12	\$24.24	\$24.84	2.42%	\$29.99	19.17%
MIS8657	MISSOURI PRIDE PIPE SLV/12	\$20.00	\$20.50	2.44%	\$29.99	33.31%

Cancel Remove Item(s) From Change Apply Changes

- 2) Cost Changes - allows you update the last cost / manufacturer list cost of items
- 3) Field Updates - allows you to change the categories for items
- 4) Utilities - allows you to create vendor parts for items (uses the item number to create the part number), add items to promotions, terms, or prebooks
- 5) Additional Utilities - allows you to undo changes; if you accidentally put an incorrect price or cost, this will allow you to go back and undo those changes

Undo Changes

Changes To Reverse

Changed Time	Item #	Description	Change Type	Change From	Change To
6/19/2018 ...	USA1379	USA GOLD MEN 100 CTN*	Manuf Cost ...	\$47.55	\$48.05
6/19/2018 ...	USA2092	USA RED 100 CTN*	Manuf Cost ...	\$47.55	\$48.05
6/19/2018 ...	USA1355	USA GOLD MEN GOLD CTN*	Manuf Cost ...	\$47.55	\$48.05
6/19/2018 ...	USA1362	USA GOLD MEN GOLD 100 CTN*	Manuf Cost ...	\$47.55	\$48.05
6/19/2018 ...	USA1324	USA GOLD MEN GOLD 100 BOX CTN*	Manuf Cost ...	\$47.55	\$48.05
6/19/2018 ...	USA1331	USA GOLD CTN*	Manuf Cost ...	\$47.55	\$48.05
6/19/2018 ...	USA1348	USA RED CTN*	Manuf Cost ...	\$47.55	\$48.05
6/19/2018 ...	USA1195	USA BLUE 100 CTN*	Manuf Cost ...	\$47.55	\$48.05
6/19/2018 ...	USA1287	USA GOLD 100 CTN*	Manuf Cost ...	\$47.55	\$48.05
6/19/2018 ...	USA1164	USA RED BOX CTN*	Manuf Cost ...	\$47.55	\$48.05
6/19/2018 ...	USA1171	USA GOLD BOX CTN*	Manuf Cost ...	\$47.55	\$48.05
6/19/2018 ...	USA1188	USA BLUE CTN*	Manuf Cost ...	\$47.55	\$48.05
6/19/2018 ...	USA1140	USA GOLD MEN 100 BOX CTN*	Manuf Cost ...	\$47.55	\$48.05
6/19/2018 ...	USA1157	USA NF CTN*	Manuf Cost ...	\$47.55	\$48.05

Filter: From 6/15/2018 To 6/23/2018 [Apply](#)

FasTraxPOS

- 6) Pricebook Zones - allows you to set the price of items in pricebook zones
- 7) Stamps - allows you to add multiple items to a particular stamp
- 8) Reports
 - a) Price List Report - shows items, description, and price (has option to show costs and suspect items)
 - b) List Reports
 - 1) Item Number List - Tree info - shows item number, description and categories
 - 2) Item Number List - UPC info - shows item number, description, cost, price, and UPCs
 - c) Vendor Part Report - shows items from a specific vendor (list includes item number, description, last cost, price, margin, vendor part number, and number of units in the part)

Stamps

- 1) Click on the stamps tab
- 2) Go to Stamp Groups
- 3) Click “Add Group”
- 4) Enter the name of the group and click save
- 5) Now go to Stamp Details
- 6) Click on Add Item under general information
- 7) Enter the name of the stamp and click ok
- 8) Give the stamp a name (it can be the same as the Item name)
- 9) Select the group that the stamp will belong to
- 10) Under value enter the amount of the stamp

If a carton requires a city and a state stamp, on the city stamp check the box “Has an Affiliate” Then select the state stamp that goes with it. This will add the state stamp to any item with the city stamp.

- 11) Click save item
- 12) To add accounts to the stamp click on “Manage Customers” in the customer section of the page
- 13) Here you can add a single account, add by account group, or add by state

The screenshot shows a window titled "Stamp Customers" with a table of accounts and a control panel below. The table has two columns: "Acct #" and "Name". The control panel includes dropdown menus for "Account", "Account Group", and "State", along with buttons for "Add Account", "Add All", "Add Group", "Add State", "Remove All", "Remove Accounts", and "Close".

Acct #	Name
32759	FTX 1
32750	FTX 10
32748	FTX 11
32756	FTX 12
32720	FTX 14
32715	FTX 15
32714	FTX 16
32710	FTX 17
32709	FTX 18
32758	FTX 2
32757	FTX 3
32755	FTX 4
32753	FTX 6
32751	FTX 7
32752	FTX 8
32749	FTX 9

Account: FTX 1
Account Group: Alabama Stores
State: Alabama

14) Once you select the account, account group, or state click the appropriate add button

15) You will now have those accounts you just added show in the customers section

Customers:

Customer Name	Account Number
FTX 1	32759
FTX 10	32750
FTX 11	32748
FTX 12	32756
FTX 14	32720
FTX 15	32715
FTX 16	32714
FTX 17	32710
FTX 18	32709
FTX 2	32758
FTX 3	32757
FTX 4	32755
FTX 6	32753
FTX 7	32751
FTX 8	32752
FTX 9	32749

[Manage Customers](#)

16) To add a vendor part, click add part

Vendor Parts

Vendor	Part Num	Num Units	Part Cost
Stamp Vendor	AL Stamp	100	\$250.00

[Add Part](#) [Edit Part](#) [Delete Part](#) Purchase Qty:

17) Enter the vendor, part number, part cost, number of units, and click save

18) To add items to the stamps, go to Mass Updates and choose the Stamps tab

Price Changes Cost Changes Field Updates Utilities Add Utilities Pricebook Zones **Stamps** Reports

Stamp: Alabama State

19) Filter to the category that has the items to be added

Remember that any item in the mass update window will be added to the stamp

20) Select the stamp to add the items to and click "Add Stamp"

249 Items

Analysis	Item #	Description	Last Cost	Avg Cost	Manuf Cost	Default Retail
Analysis	012300112130	WINSTON BK	\$25.24	\$27.007	\$44.04	\$52.49
Analysis	12	Nails Carton	\$25.50	\$25.219	\$46.54	\$46.54
Analysis	2	TEST 2	\$92.48	\$92.259	\$100.50	\$100.50
Analysis	AMS5314	AMER SPIRIT BALANCE BOX CTN*	\$61.07	\$0.000	\$61.57	\$63.51
Analysis	ASP185	AMER SPIRIT BLUE CTN	\$61.07	\$0.000	\$61.57	\$63.51
Analysis	ASP192	AMER SPIRIT MELLOW BX CTN*	\$61.07	\$0.000	\$61.57	\$63.51
Analysis	ASP321	AMER SPIRIT MEN BX CTN*	\$61.07	\$0.000	\$61.57	\$63.51
Analysis	ASP338	AMER SPIRIT SMOOTH MELLOW CTN*	\$61.07	\$0.000	\$61.57	\$63.51
Analysis	CAM0138	CAMEL BLUE 99'S CTN	\$57.20	\$0.000	\$57.70	\$59.49
Analysis	CAM0584	CAMEL 99'S 8.00 OFF CTN*	\$49.16	\$0.000	\$49.66	\$51.21
Analysis	CAM0733	CAMEL WIDE MEN CTN	\$57.20	\$0.000	\$57.70	\$59.49
Analysis	CAM0847	CAMEL WIDE MEN SILVER CTN	\$5.66	\$5.659	\$57.70	\$59.49
Analysis	CAM1003	CAMEL NO 9 PINK 100 CTN	\$57.20	\$0.000	\$57.70	\$59.49
Analysis	CAM1010	CAMEL NO 9 GREEN 100 CTN	\$57.20	\$0.000	\$57.70	\$59.49
Analysis	CAM1134	CAMEL NF CTN	\$70.48	\$0.000	\$70.98	\$73.30
Analysis	CAM2131	CAMEL CTN	\$57.20	\$0.000	\$57.70	\$59.49
Analysis	CAM2135	CAMEL 100 CTN	\$57.20	\$0.000	\$57.70	\$59.49
Analysis	CAM2137	CAMEL SILVER 100 BOX CTN	\$57.20	\$0.000	\$57.70	\$59.49
Analysis	CAM2890	CAMEL TURKISH ROYAL CTN	\$57.20	\$0.000	\$57.70	\$59.49
Analysis	CAM3138	CAMEL BOX CTN	\$57.20	\$48.067	\$57.70	\$59.49

Price Changes Cost Changes Field Updates Utilities Add Utilities Pricebook Zones **Stamps** Reports

Stamp: Alabama State