



Global Adjustments and File Upload

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Using Global Adjustment

Introduction

The Global Adjustment screen is a powerful screen within the SnapTracker application and needs to be used with caution. The Global Adjustment screen enables you to globally search and replace data in certain fields within specific SnapTracker tables.

Updates to the database can be completed directly through the Global Adjustment interface or by downloading the information in an Excel spreadsheet format. The file can be edited and then uploaded within the File Upload screen.

Tables available in the Global Adjustment screen include:

- Item
- Item Supplemental (Item Userfields)
- Item Maintenance
- Item Transaction
- Standard
- Standard Attribute
- Standard Class

Within the Global Adjustment screen, one table can be adjusted at a time, but within that table, a user can update multiple fields at the same time.

Accessing the Global Adjustment Screen

1. From the left navigation bar, select **Utilities, Maintenance, Global Adjustment**.

The Global Adjustment screen displays.

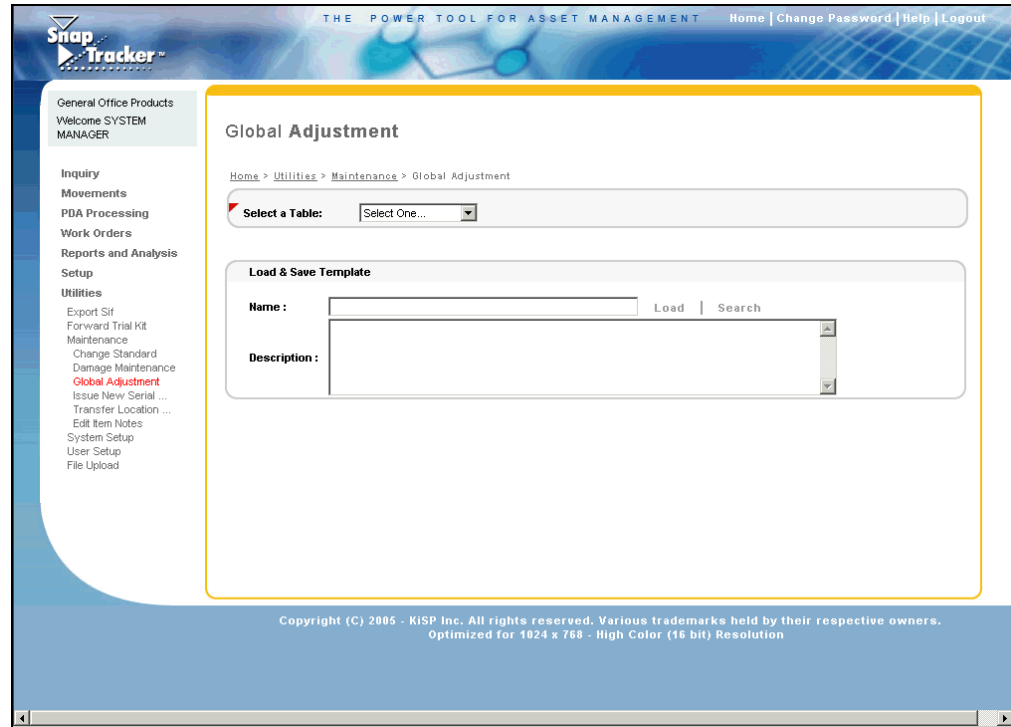


Figure 1 – Global Adjustment Screen

There are two ways you can populate the screen.

1. Select the table in which you would like to edit information. (For more information on this option, see the section titled “Selecting a Table”).
2. Select a template that was saved from a previous occasion. (For more information on the template option, see the section titled “Loading a Template”).

Selecting a Table

1. From the Select a Table drop-down selection box, select the **table** in which you would like to edit data.

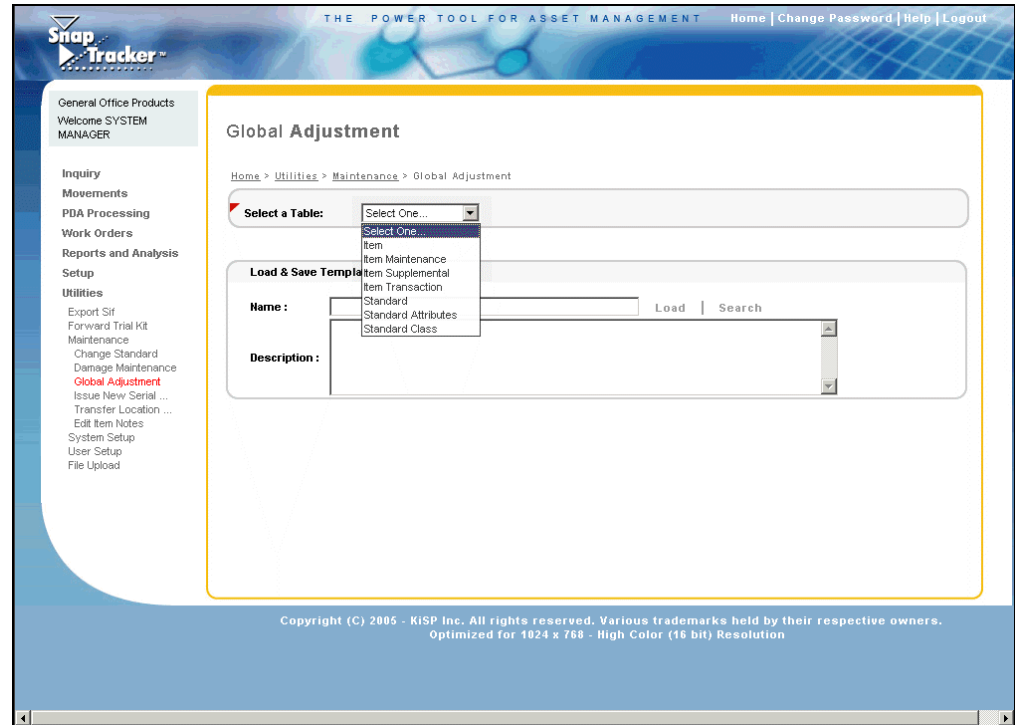


Figure 2 – Global Adjustment – Displaying Tables

Tables available in the Global Adjustment screen include:

- Item
- Item Supplemental (Item Userfields)
- Item Maintenance
- Item Transaction
- Standard
- Standard Attribute
- Standard Class

The screen refreshes based on the table you selected. Each table has certain fields that are pre-selected for you and that are mandatory. The mandatory fields are not editable within the results, but do display on the results screen.

Table	Mandatory Fields
Item	Company Code Customer Number Serial Number
Item Supplemental	Company Code Customer Number Serial Number
Item Transaction	Company Code Customer Number Serial Number
Item Maintenance	Company Code Customer Number Serial Number
Standard	Company Code Customer Number Standard
Standard Attributes	Company Code Customer Number Standard
Standard Class	Company Code Customer Number Standard Class

The mandatory fields for the table display in the Selected Fields section of the screen.

Note: The mandatory fields cannot be removed from the Selected Fields box on the screen.

The greater the number of fields you select to display from the list, the longer it takes to display the results. To maximize performance, it is recommended you only select the fields you need to modify. For example, there are 40 fields within the Standard table that you can adjust. If all of these fields are selected for display at the same time, the Global Adjustment Spreadsheet page may take some time to load. It is recommended that you only select the fields you intend to modify.



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 System Setup
 User Setup
 File Upload

Global Adjustment

Home > Utilities > Maintenance > Global Adjustment

Select a Table: Standard Class

Select Fields
 Select the fields you would like displayed and in the order you would like to see them on the spreadsheet.

Description 1
 Description 2
 Description 3
 Description 4
 Description 5
 Description 6
 Maintenance Cost

Selected Fields
 Company
 Customer No
 Standard Class

All

Select Customer(s): Select One... Add To List

Selected Customer(s)

Enter any values you would like to filter the items for selection by:
 Select Criteria: Select One... Conditions: Equal to Value: Search
 Enter Criteria: Get Record Relation: AND OR Add To List

Selected Filter(s)

Load & Save Template
 Name: Load Search Save
 Description:

Reset View Data

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Figure 3 – Global Adjustment Screen

- From Select Fields, highlight the fields you would like to display or modify in the selected table.
- Click  .
The highlighted fields move to the Selected Fields box.

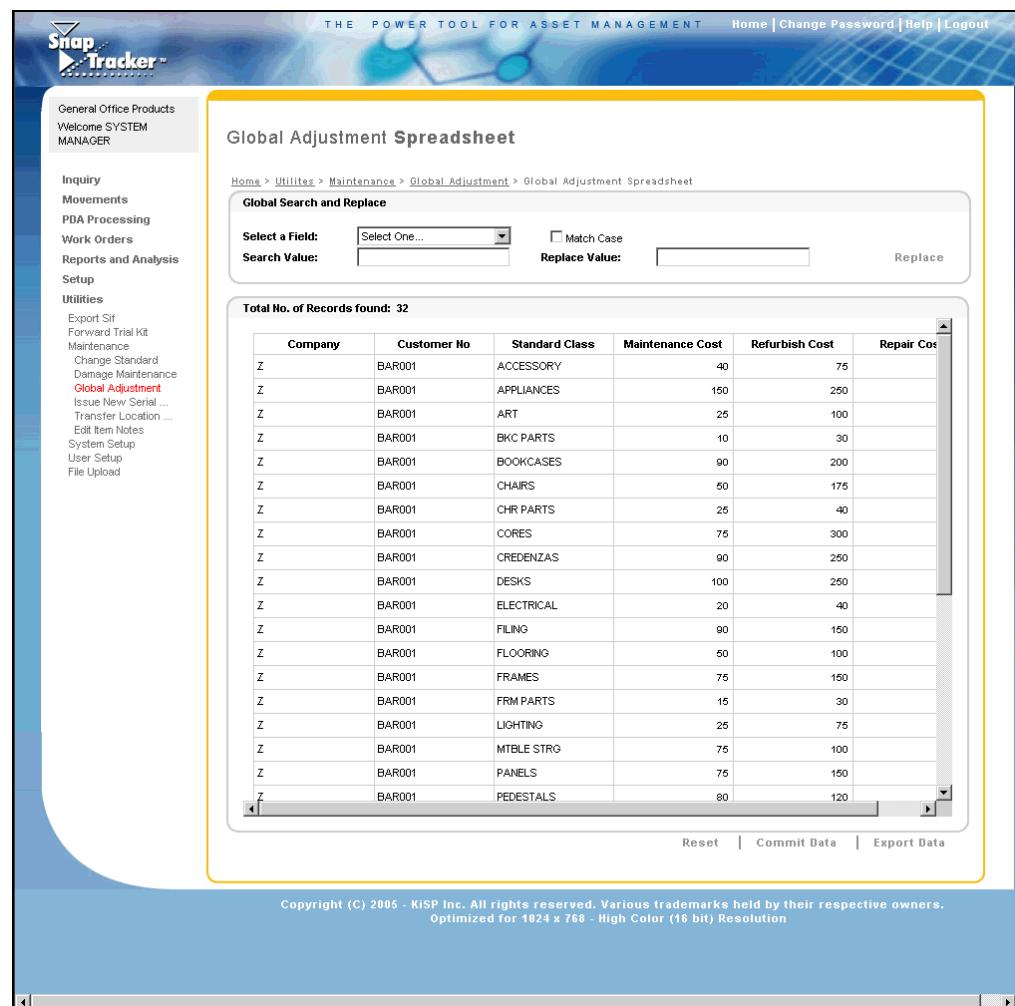
4. Determine the order you would like the fields to display in.

If you want to...	Then do this...
View the data in the order the Selected Fields are currently displayed	Move on to the next step.
Modify the order the columns display in	1. Highlight the field you would like to move. 2. Click the  or  to move the fields to the desired order.

5. From the Select Customer(s) drop-down selection box, select the **Customer(s)** you would like included in your search.
6. Click **Add to List**.
The selected Customer(s) display in the Selected Customer(s) box.

7. Determine if you would like to further filter your search.

If you want to...	Then do this...
View the data without filtering any further.	Click View Data . The Global Adjustment Spreadsheet screen displays.
Further filter your search.	- From the Enter any values you would like to filter the items for selection by select the parameters you would like to filter the results by. - Click View Data. The Global Adjustment Spreadsheet screen displays.



Global Adjustment Spreadsheet

Home > Utilities > Maintenance > Global Adjustment > Global Adjustment Spreadsheet

Global Search and Replace

Select a Field: ☐ Match Case
 Search Value: Replace Value:

Total No. of Records found: 32

Company	Customer No	Standard Class	Maintenance Cost	Refurbish Cost	Repair Cost
Z	BAR001	ACCESSORY	40	75	
Z	BAR001	APPLIANCES	150	250	
Z	BAR001	ART	25	100	
Z	BAR001	BKC PARTS	10	30	
Z	BAR001	BOOKCASES	90	200	
Z	BAR001	CHAIRS	50	175	
Z	BAR001	CHR PARTS	25	40	
Z	BAR001	CORES	75	300	
Z	BAR001	CREDENZAS	90	250	
Z	BAR001	DESKS	100	250	
Z	BAR001	ELECTRICAL	20	40	
Z	BAR001	FILING	90	150	
Z	BAR001	FLOORING	50	100	
Z	BAR001	FRAMES	75	150	
Z	BAR001	FRM PARTS	15	30	
Z	BAR001	LIGHTING	25	75	
Z	BAR001	MTBLE STRG	75	100	
Z	BAR001	PANELS	75	150	
Z	BAR001	PEDESTALS	80	120	

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Figure 4 – Global Adjustment Spreadsheet Screen

Filtering the Global Adjustment Search Using Parameters

Within the Global Adjustment screen, you are able to filter your search by using parameters and creating conditions within the screen from different tables. To see what filters are available for each table; refer to “Appendix B”.

The conditions that are available are:

- Equal to
- Greater than
- Less than
- Greater than or equal to
- Less than or equal to
- Not equal to
- Like – this would be for a wildcard search

In order to use the Search filters, do the following:

1. From the From the Enter any values you would like to filter the items for selection by drop-down selection box, select the field you would like to use to filter the search results by. For example, if you want to filter by Standard Class, select Table_Prefix_Std_Class.
2. From the Conditions drop-down selection box, select the condition you would like the field to use. For example, if you want a specific Standard Class, select Equal To.
3. In the Value test box, enter the value you would like to use. For example, enter the Standard Class of CHAIRS.

Note: If you are not sure, you can click **Search**. A list of available values from the selected field displays. Highlight the field name within the pop-up box and click **Assign**. The listing is not filtered by the selected Customers.

4. Click **Add to List**.

The selected filter displays in the Selected Filter(s) box.

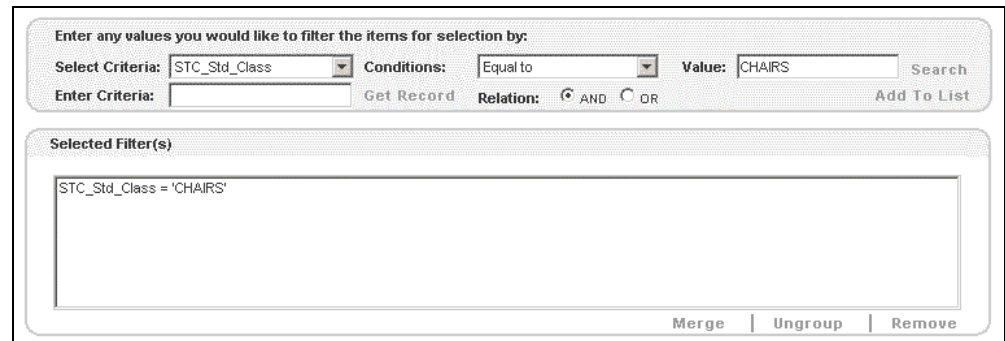


Figure 5 – Global Adjustment Screen, Filtering Portion

You can filter using more than one criteria so that you can really isolate the specific records you need to modify. For example, you may want only the items assigned to the Standard Class of CHAIRS that have a Repair Cost less than or equal to 1.

5. Determine if you would like to further filter your search.

If you want to...	Then do this...
View the data without filtering any further.	Click View Data . The Global Adjustment Spreadsheet screen displays.
Further filter your search.	From the Enter any values you would like to filter the items for selection by select the parameters you would like to filter the results by.

6. Determine how you want to group the criteria together. You have two options:

- And
- Or

7. To group the criteria together, highlight the fields in the Selected Filters box.

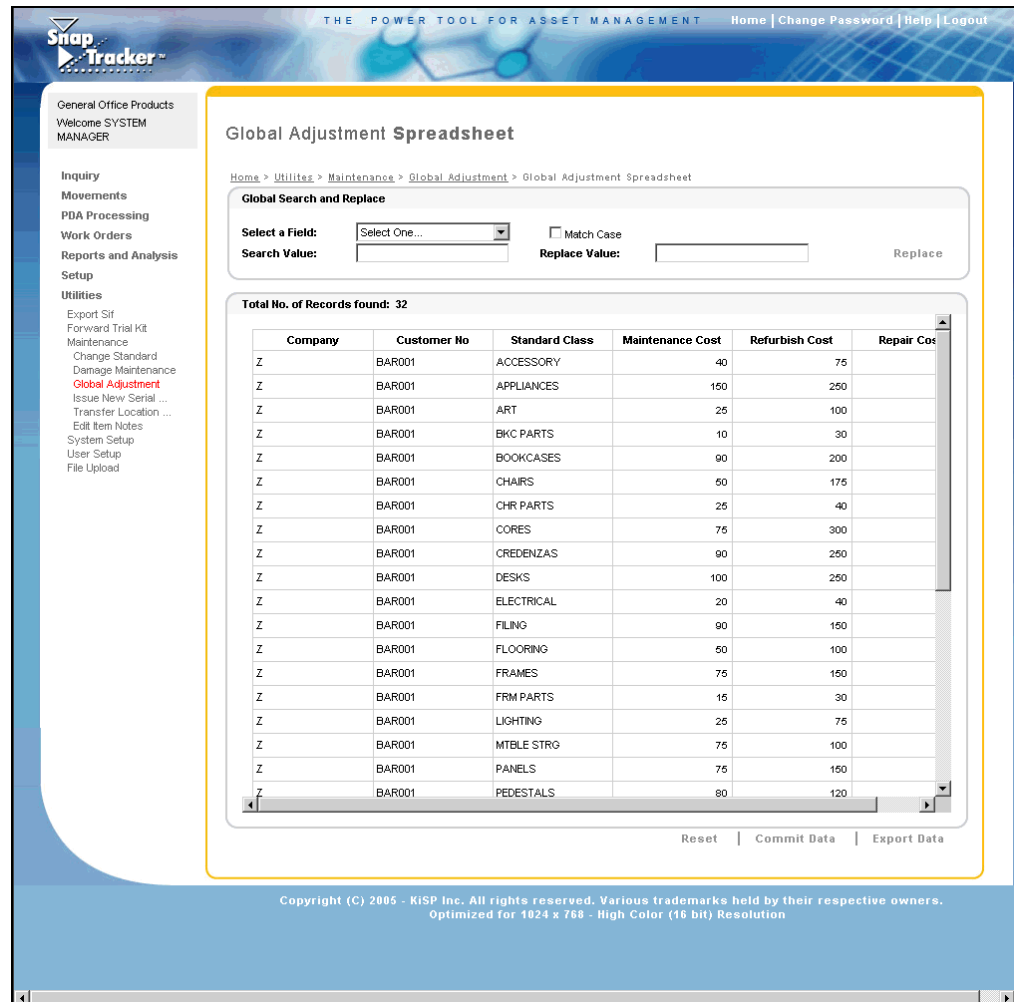
8. Click **Merge**.

Note: If you would like to separate the filters once they are combined, highlight the fields and click **Ungroup**.

If you would like to remove a filter from the selected filters, highlight the filter and click **Remove**.

9. Click **View Data**.

The Global Adjustment Spreadsheet screen displays.



Global Adjustment Spreadsheet

Home > Utilities > Maintenance > Global Adjustment > Global Adjustment Spreadsheet

Global Search and Replace

Select a Field: ☐ Match Case

Search Value: Replace Value:

Total No. of Records found: 32

Company	Customer No	Standard Class	Maintenance Cost	Refurbish Cost	Repair Cost
Z	BAR001	ACCESSORY	40	75	
Z	BAR001	APPLIANCES	150	250	
Z	BAR001	ART	25	100	
Z	BAR001	BKC PARTS	10	30	
Z	BAR001	BOOKCASES	90	200	
Z	BAR001	CHAIRS	50	175	
Z	BAR001	CHR PARTS	25	40	
Z	BAR001	CORES	75	300	
Z	BAR001	CREDENZAS	90	250	
Z	BAR001	DESKS	100	250	
Z	BAR001	ELECTRICAL	20	40	
Z	BAR001	FILING	90	150	
Z	BAR001	FLOORING	50	100	
Z	BAR001	FRAMES	75	150	
Z	BAR001	FRM PARTS	15	30	
Z	BAR001	LIGHTING	25	75	
Z	BAR001	MTBLE STRG	75	100	
Z	BAR001	PANELS	75	150	
Z	BAR001	PEDESTALS	80	120	

Reset | Commit Data | Export Data

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Figure 6 – Global Adjustment Spreadsheet Screen

Modifying Data in the Global Adjustment Spreadsheet Screen

The Global Adjustment Spreadsheet screen displays the records in the database that meet the selection criteria made in the Global Adjustment Screen in a grid format. The screen enables you to modify the data for specified fields within the database. To see what fields are available for editing within each table; refer to “Appendix A”.

Within the screen, you can perform:

- Search and replace functions.
- Update individual columns.
- Export the data to an Excel spreadsheet for modifications and uploading into SnapTracker from within the File Upload screen.
- Commit the data to the database overwriting previous information.

Searching and Replacing

The Global Search and Replace section enables users to select a field within the spreadsheet, search for a specific value and replace it with an updated value.

The Global Adjustment Spreadsheet screen needs to be displayed before using this function.

1. From the Select a Field drop-down selection box, select the field within the spreadsheet that you would like to update. For example Repair Cost.

Note: The fields available in the Select a Field drop-down selection box are the fields selected from the Global Adjustment, Selected Fields that are not mandatory.

2. In the Search Value text box, enter the value you want to update. For example, you want to update the Maintenance Cost value of 75 with another value.
3. In the Replace Value text box, enter the value you want the field updated with. For example, you want to update the Maintenance Cost value of 75 to 90.

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Global Adjustment Spreadsheet

Home > Utilities > Maintenance > Global Adjustment > Global Adjustment Spreadsheet

Global Search and Replace

Select a Field: Maintenance Cost ☐ Match Case
Search Value: 75 Replace Value: 90 Replace

Total No. of Records found: 32

Company	Customer No	Standard Class	Maintenance Cost	Refurbish Cost	Repair Cost
Z	BAR001	ACCESSORY	40	75	
Z	BAR001	APPLIANCES	150	250	
Z	BAR001	ART	25	100	
Z	BAR001	BKC PARTS	10	30	
Z	BAR001	BOOKCASES	90	200	
Z	BAR001	CHAIRS	50	175	
Z	BAR001	CHR PARTS	25	40	
Z	BAR001	CORES	75	300	
Z	BAR001	CREDENZAS	90	250	
Z	BAR001	DESKS	100	250	
Z	BAR001	ELECTRICAL	20	40	
Z	BAR001	FILING	90	150	
Z	BAR001	FLOORING	50	100	
Z	BAR001	FRAMES	75	150	
Z	BAR001	FRM PARTS	15	30	
Z	BAR001	LIGHTING	25	75	
Z	BAR001	MTBLE STRG	75	100	
Z	BAR001	PANELS	75	150	
Z	BAR001	PEDESTALS	80	120	

Reset | Commit Data | Export Data

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Figure 7 – Global Adjustment Spreadsheet Screen – Search and Replace Values Populated

4. Click **Replace**.

SnapTracker searches for the value and replaces it. Once complete, a pop up message displays telling you how many replacements were made in the spreadsheet.



Figure 8 – Notification Box

5. Click **OK**.

Note: Only the values displayed within the screen are modified at this time. The database has not been updated.

Updating Individual Columns

Users are able to update individual cells within the spreadsheet. Mandatory information such as Company Code and Customer Number are not editable within the screen.

The Global Adjustment Spreadsheet screen needs to be displayed before using this function.

1. To activate the cell, click it.
The cell becomes active.
2. Enter the value you want the database updated to.
3. To save the information within the spreadsheet, click out of the cell.

Note: Only the values displayed within the screen are modified at this time.
The database has not been updated.

Exporting Data to an Excel Spreadsheet

Users are able to export and download the data from the Global Adjustment Spreadsheet screen into an Excel spreadsheet. If you are making a large number of modifications, it may be faster to download the spreadsheet and make the modifications within Excel. When the changes are complete within the Excel spreadsheet, you can upload the changes to the database using the File Upload screen.

The Global Adjustment Spreadsheet screen needs to be displayed before using this function.

1. To export the data in the spreadsheet, click **Export Data**.
The File Download screen displays.

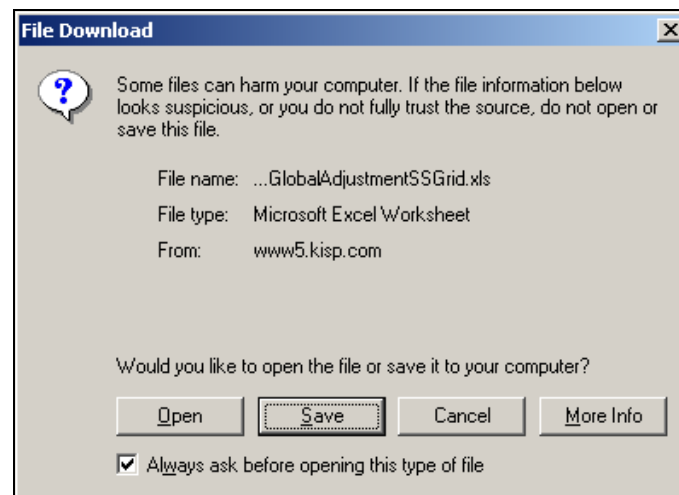


Figure 9 – File Download Screen

2. Determine how you would like to view the file. Click **Open** or **Save**.

Note: For information on editing the spreadsheet to upload, refer to “Appendix D”.

Committing Data to the Database

Users are able to update fields within the database from the Global Adjustment Spreadsheet screen.

Note: If you are making a large number of modifications, it may be faster to download the spreadsheet and make the modifications within Excel.

The Global Adjustment Spreadsheet screen needs to be displayed before using this function.

Once you have made the modifications you want to the spreadsheet within the Global Adjustment Spreadsheet using either Search and Replace or updating individual cells, you can commit the data and overwrite the existing information.

1. Click **Commit Data**.

A pop-up screen displays informing you: “You are about to submit your changes to Batch Processing. Do you wish to continue?”

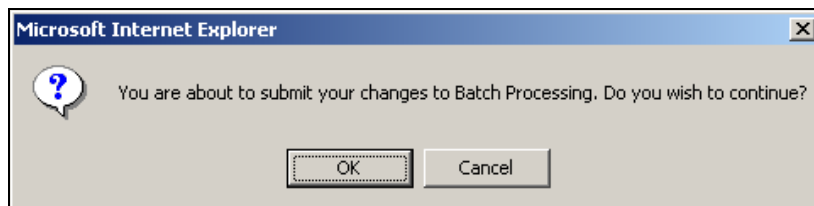
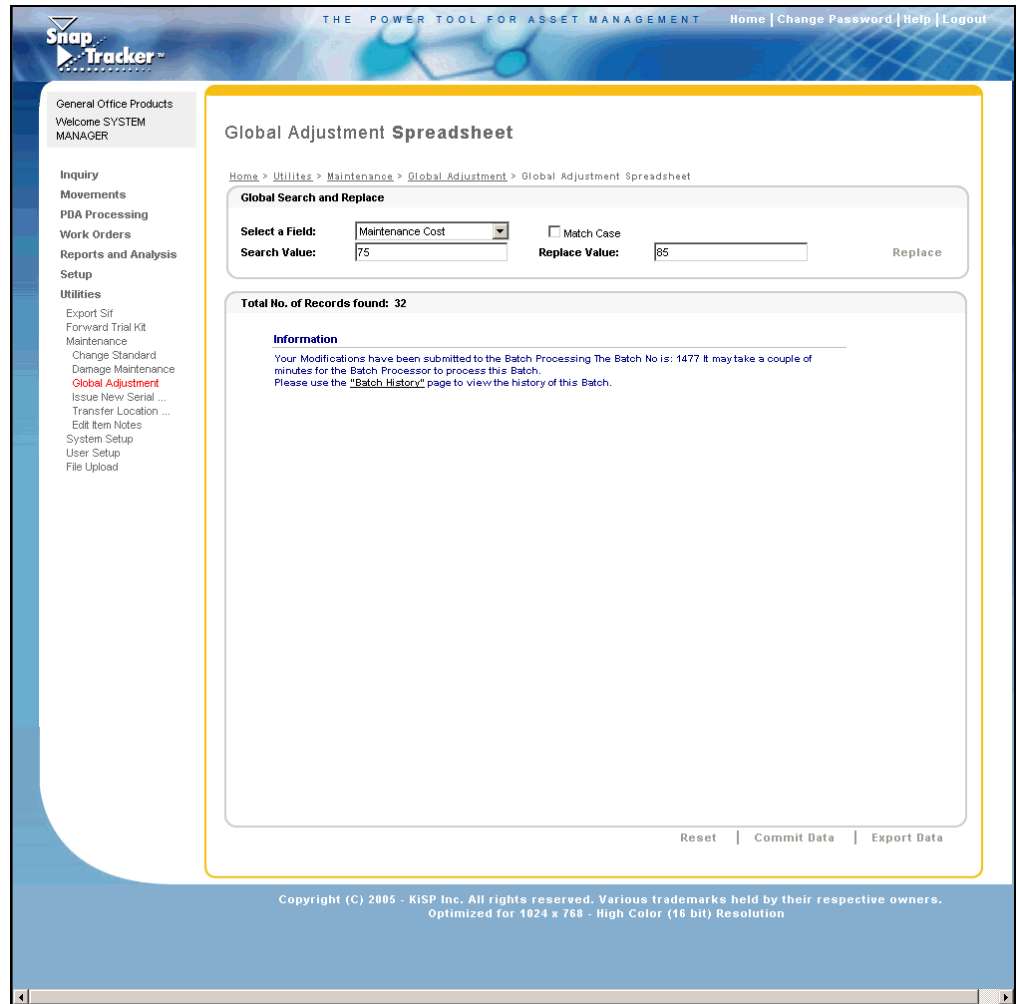


Figure 10 – Microsoft Internet Explorer Message

2. Click **OK**.

The information is submitted to a batch for processing. The screen refreshes and provides you with the batch number assigned to the modifications you have made. The batch is processed. Any errors that occur when updating the information are available for correction in the PDA Processing screens.



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Global Adjustment
Issue New Serial ...
Transfer Location ...
Edit Item Notes
System Setup
User Setup
File Upload

Global Adjustment Spreadsheet

Home > Utilities > Maintenance > Global Adjustment > Global Adjustment Spreadsheet

Global Search and Replace

Select a Field: Maintenance Cost ☐ Match Case
Search Value: 75 Replace Value: 85

Total No. of Records found: 32

Information
Your Modifications have been submitted to the Batch Processing The Batch No is: 1477 It may take a couple of minutes for the Batch Processor to process this Batch.
Please use the "Batch History" page to view the history of this Batch.

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Figure 11 – Global Adjustment Spreadsheet Screen – Information

Saving a Template

Within the Global Adjustment Screen there is an option to save a template. The Save Template option enables users to save the selections made in the Selected Fields and Filters sections as a template for future use.

The templates are saved so that all users have access to use them.

1. In order to save a template, access the Global Adjustment Screen and make the selections you would like to save within the Selected Fields and Filters sections.

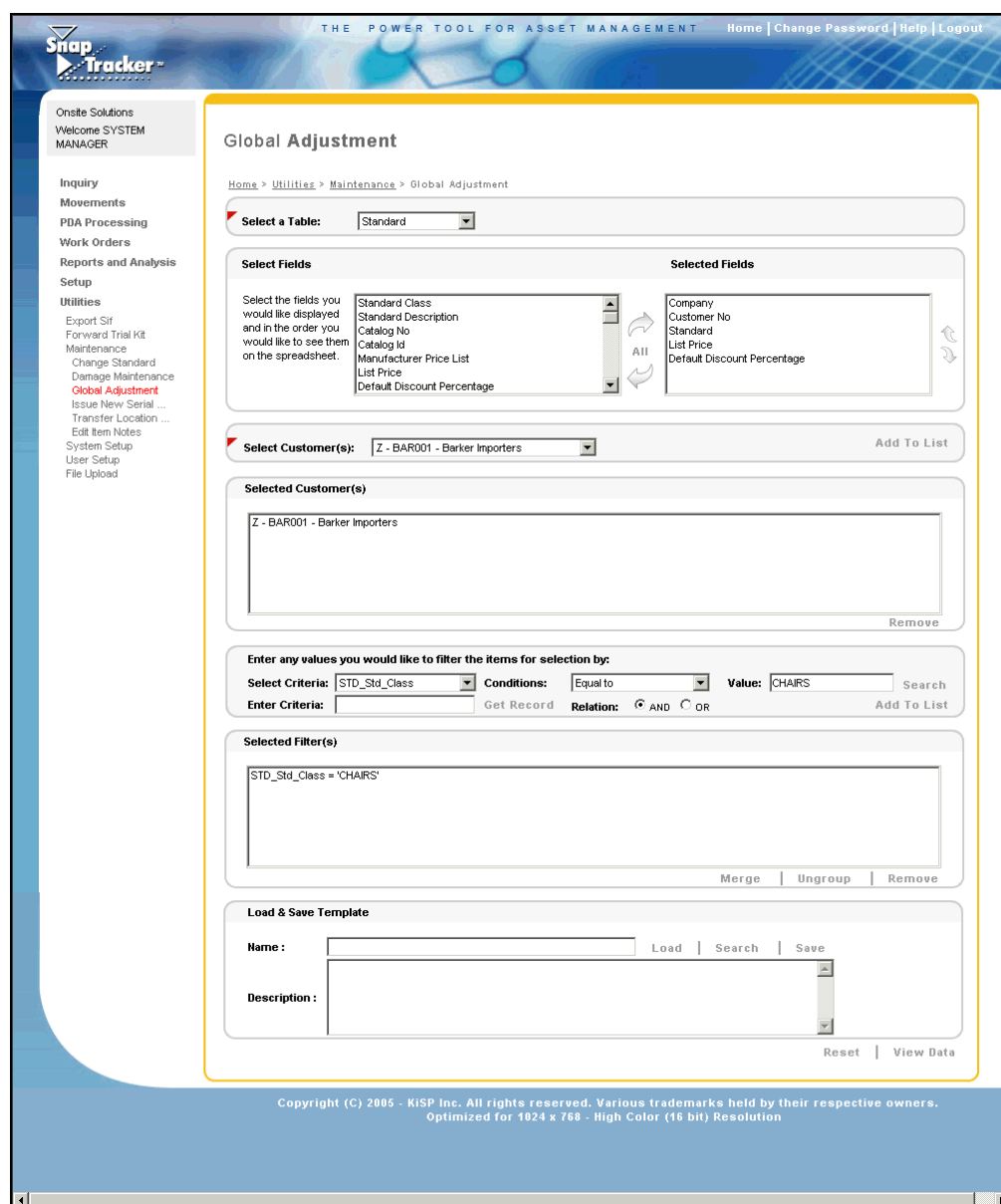


Figure 12 – Global Adjustments Screen – Selections Completed

2. In the Name text box within the Load & Save Template section, enter the **name** of the template you would like to save.
3. In the Description text box, enter a **description** of the report, if you would like.
4. Click **Save**.

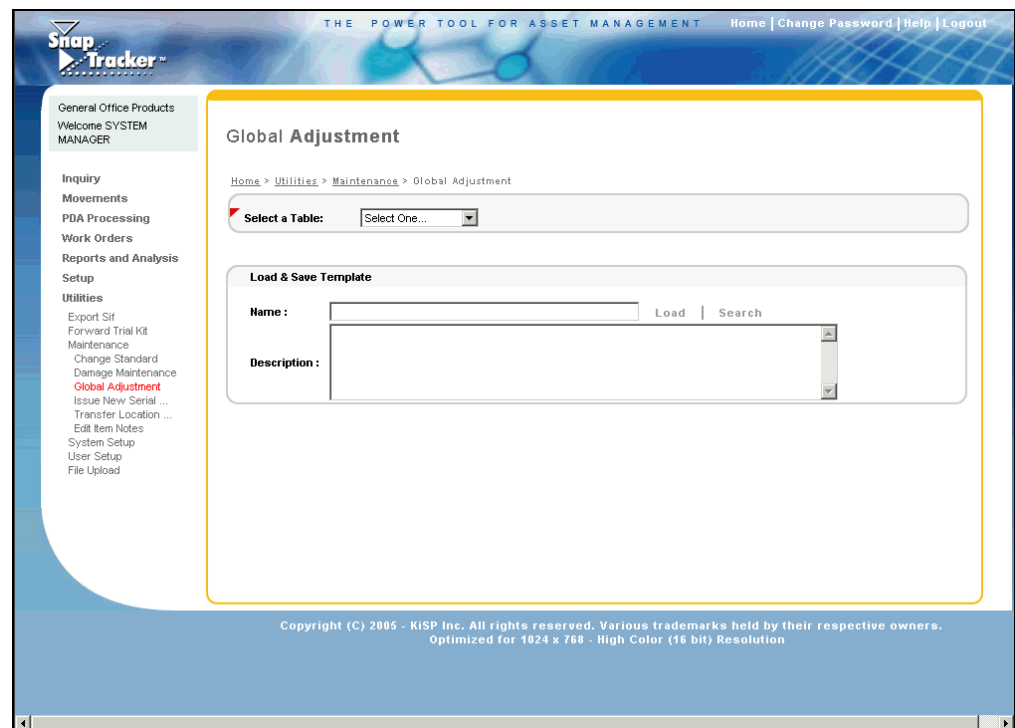
The template is saved for use in the future.

Note: Each template must have a unique name. If you try to save a template with a name that already exists, a message is returned: **The Template Name 'XXXXX' is being used by another template. Unable to save this template with the same name. Please enter another Name.**

Loading a Template

1. From the left navigation bar, select **Utilities, Maintenance, Global Adjustment**.

The Global Adjustment screen displays.



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Edit Item Notes
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User Setup
File Upload

Global Adjustment

Home > Utilities > Maintenance > Global Adjustment

Select a Table: Select One...

Load & Save Template

Name: [Text Box] Load Search

Description: [Text Box]

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Figure 13 – Global Adjustment Screen

2. From the Load & Save a Template section, determine how you would like to load the template.

If you want to...	Then do this...
Enter the name of the template.	1. In the Name text box, enter the name of the template you want to load. 2. Click Load. The Global Adjustment Spreadsheet screen refreshes displaying the selected fields and filters from the template.
Search for the template.	1. From the Load & Save a Template section, click Search. The Search Template Information screen displays. 2. Click Search. All available templates display. 3. To select a template, select the Select bullet beside the template name. 4. Click Select. The Global Adjustment Spreadsheet screen refreshes displaying the selected fields and filters from the template.

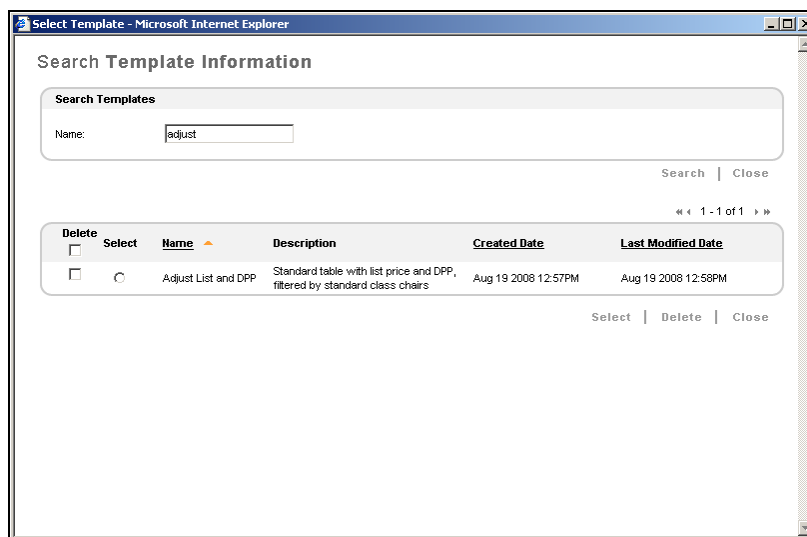
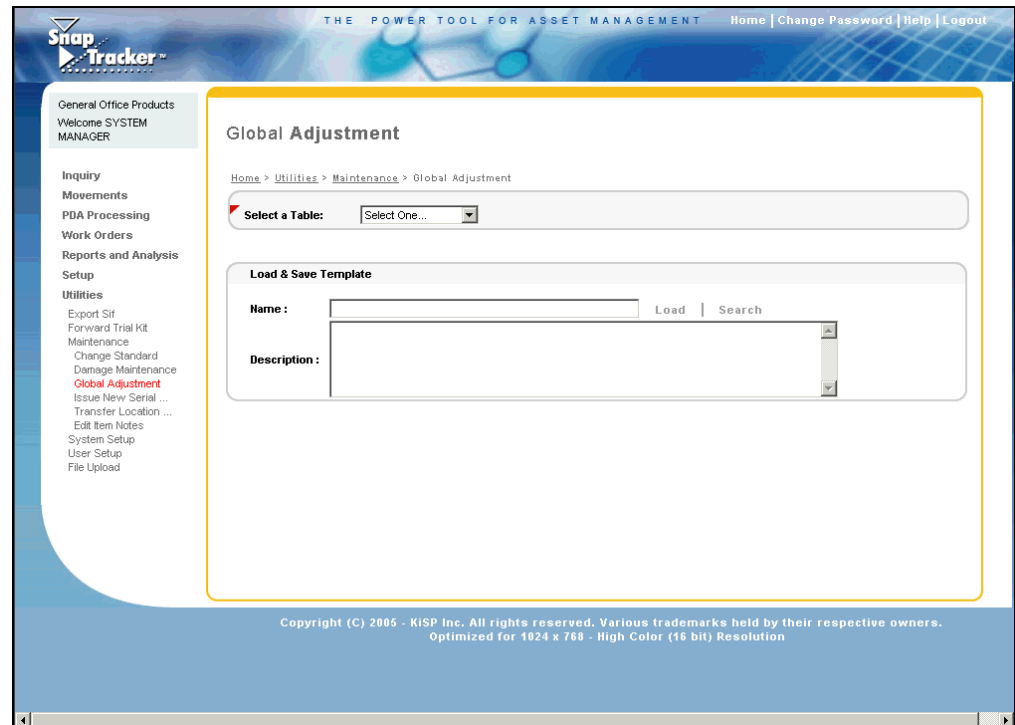


Figure 14 – Search Template Information Screen

Deleting a Template

1. From the left navigation bar, select **Utilities, Maintenance, Global Adjustment**.

The Global Adjustment screen displays.



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Global Adjustment

Home > Utilities > Maintenance > Global Adjustment

Select a Table:

Load & Save Template

Name : Load | Search

Description :

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Figure 15 – Global Adjustment Screen

2. From the Load & Save a Template section, click **Load**.

The Search Template Information screen displays.

Note: You can only select one template at a time for display.

3. Click **Search**.
All available templates display.

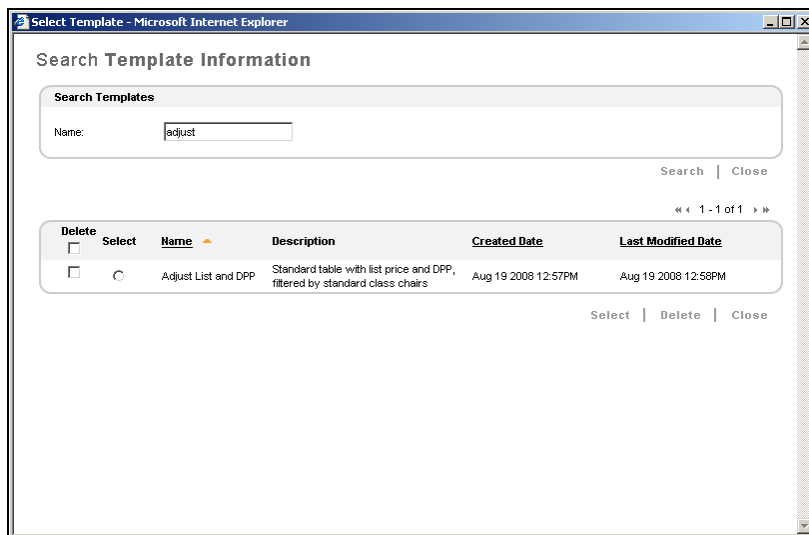


Figure 16 – Search Template Information Screen

4. To select a template, select the **Delete** check-box beside the template name.
5. Click **Delete**.
A warning message displays asking: Are you sure you want to delete selected Template(s)?

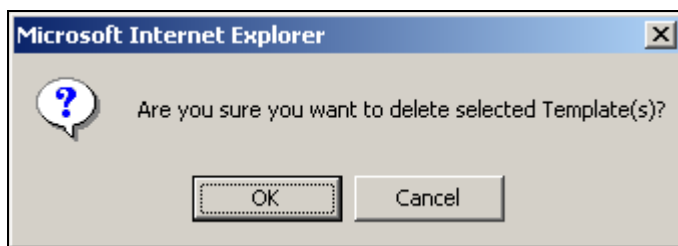


Figure 17 – Warning Message

Note: Multiple templates can be selected for deletion.

6. Click **OK**.
The template is deleted.

File Upload Additions

The File Upload screen has been expanded to accommodate Excel spreadsheets generated from the Global Adjustment screen. The new options introduced within the File Upload screen are:

- Global Adjust Item
- Global Adjust Supplemental
- Global Adjust Item Maintenance
- Global Adjust Item Transaction
- Global Adjust Standard
- Global Adjust Standard Attribute
- Global Adjust Standard Class

Note: For details on the fields available within the Global Adjustment tables, refer to “Appendix A”. For information on editing the spreadsheet to upload, refer to “Appendix D”.

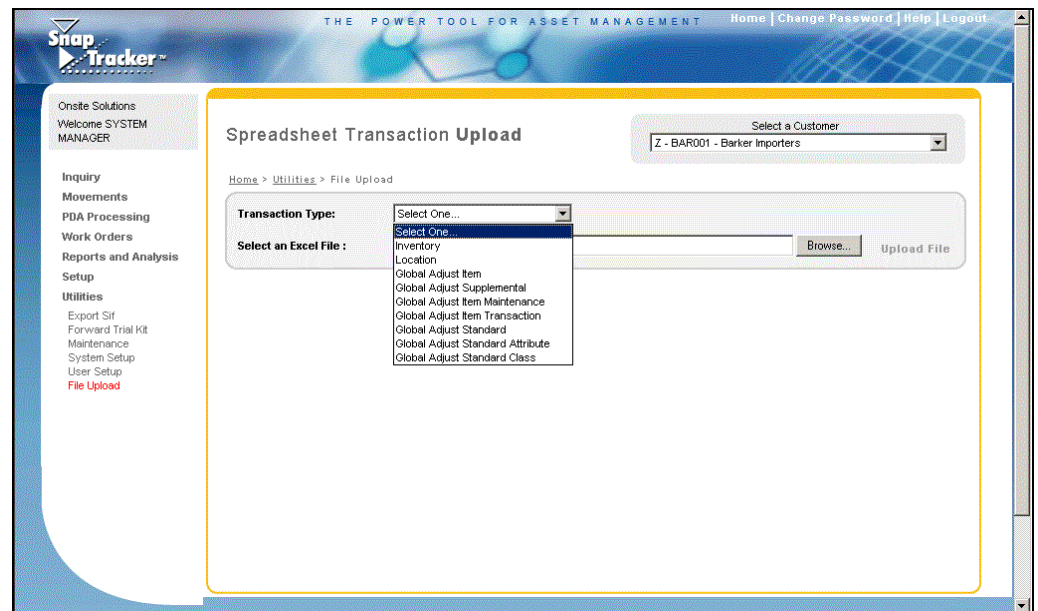


Figure 18 – Spreadsheet Transaction Upload Screen

1. From the Transaction Type drop-down selection box, select **the correct table**.
2. Beside the Select an Excel File text box, click **Browse**.
3. Browse your local computer to find the desired file.

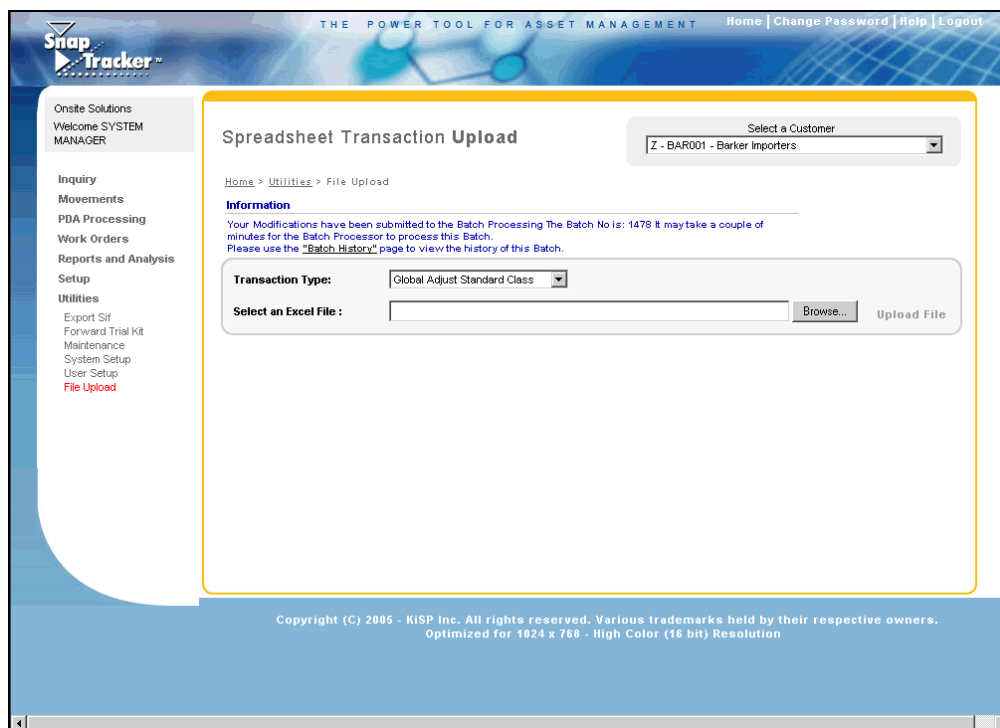
4. Click **Open**.

The Select an Excel File text box is populated with the local path to the file.

5. Click **Upload File**.

The file is read and a batch number is assigned.

The screen refreshes displaying the information messages on the screen outlining the batch number assigned. Any records that fail can be accessed in the PDA Processing, Edit Transactions screen.



The screenshot shows the 'Spreadsheet Transaction Upload' screen within the Snap Tracker application. The interface includes a top navigation bar with links for Home, Change Password, Help, and Logout. A left sidebar lists various system management options, with 'File Upload' highlighted under the 'Utilities' section. The main content area features a 'Select a Customer' dropdown menu currently set to 'Z - BAR001 - Barker Importers'. Below this, an information message states: 'Your Modifications have been submitted to the Batch Processing The Batch No is: 1478 It may take a couple of minutes for the Batch Processor to process this Batch. Please use the "Batch History" page to view the history of this Batch.' The 'Transaction Type' is set to 'Global Adjust Standard Class'. At the bottom, there is a 'Select an Excel File' text box with a 'Browse...' button and an 'Upload File' button. The footer contains copyright information for KiSP Inc. (2006) and technical specifications for the application.

Figure 19 Spreadsheet Transaction Upload Screen

Appendix A

Global Adjustments Tables and Editable Fields

Appendix A outlines what fields are available by SnapTracker table for editing within the Global Adjustment module.

Table – Item	
Asset No	Accounting Code
Default Cost Center	Available for Reuse
Date Available	Lifespan Months
Lease Id	Customer Order No
Customer Order Line	Customer Order Date
Last Receive Date	Manufacturer Price List
Purchase Price	Receive Price
Net book Value	Market Value
Standard List Price	MTD Depreciation
Default Discount Percentage	Retired Indicator
Disposal Date	Disposal Sell
Year to Date Depreciation	Accumulated Depreciation
Last Depreciation Date	Month to Date Depreciation
Mandatory columns in results: Company Code, Customer Number, Serial Number.	

Table – Item Supplemental	
Userfield 1	Userfield 2
Userfield 3	Userfield 4
Userfield 5	Userfield 6
Userfield 7	Userfield 8
Userfield 9	Userfield 10
Mandatory columns in results: Company Code, Customer Number, Serial Number.	

Table – Item Transaction	
Adjustment Indicator	Hiding Indicator
Accounting Code	Cost Center
Customer Order No	Disposal Indicator
Workstation No	Share Indicator
Share Indicator	
Mandatory columns in results: Company Code, Customer Number, Serial Number, Transaction Date, Transaction Code, Transaction Qty and Transaction Id.	

Table – Item Maintenance	
Maintenance Due Date	Maintenance Months
Maintenance Labor Hour	Maint_Matl
Maint_Overhead	Maint_Cost
Memo	
Mandatory columns in results: Company Code, Customer Number, Serial Number.	

Table – Standard Attributes	
Attribute Description 1	Attribute Description 2
Attribute Description 3	Attribute Description 4
Attribute Description 5	Attribute Description 6
Attribute Description 7	Attribute Description 8
Attribute Description 9	Attribute Description 10
Mandatory columns in results: Company Code, Customer Number, Standard	

Table – Standard Class	
Description 1	Description 2
Description 3	Description 4
Description 5	Description 6
Touchup Cost	Refurbish Cost
Repair Cost	Web Enabled Indicator
Mandatory columns in results: Company Code, Customer Number, Standard	

Table –Standard	
Standard Class	Standard Description
Catalog No	Catalog Id
Manufacturer Price List	List Price
Default Discount Percentage	Default Purchase Price
Manufacturer Id	Height
Width	Depth
Weight	Cubic Ft
Square Ft	Active Flag
Phantom Flag	Print Indicator
Userfield 1	Userfield 2
Userfield 3	Userfield 4
Userfield 5	Lifespan Months
Maintenance Length	Minimum Quantity
Maximum Quantity	Reorder Level
Product Group	SIF Flag
Price In	Price Out
Color Finish	Touchup Cost
Refurbish Cost	Repair Cost
Stock Only Indicator	Miscellaneous Flag
Web Enabled Indicator	Price Zone
Mandatory columns in results: Company Code, Customer Number, Standard.	

Appendix B

Global Adjustments Tables and Filters

Appendix B outlines which filters are available for each table within the Global Adjustment module.

Selection Criteria for ITEM table	
ITE_COMP_CODE	ITE_CUS_NO
ITE_SERIAL_NO	ITE_STD_ID
ITE_ASSET_NO	ITE_ACCOUNTING_CODE
ITE_DEFAULT_COSTCTR	ITE_CREATED_DATE
ITE_LST_UPDATE_DATE	ITE_AVAIL_FOR_REUSE
ITE_DATE_AVAIL	ITE_LIFESPAN_MONTH
ITE_LST_INV-DATE	ITE_LST_INV_BY
ITE_LEASE_ID	ITE_CUS_ORDER_NO
ITE_CUS_ORDER_LINE	ITE_CUS_ORDER_DATE
ITE_LST_RECEIVE_DATE	ITE_MNFTR_PRICE_LIST
ITE_PURCH_PRICE	ITE_RECEIVE_PRICE
ITE_NET_BOOK_VALUE	ITE_MARKET_VALUE
ITE_STD_LIST_PRICE	ITE_BATCH_NO
ITE_MTD_DEPRECIATION	ITE_YTD_DEPRECIATION
ITE_ACC_DEPRECIATION	ITE_LAST_DEPRECIATION_DATE
ITE_DEFAULT_DISCOUNT_PCNT	ITE_RETIRED_IND
ITE_DISPOSAL_DATE	ITE_DISPOSAL_SELL
STD_STD_CLASS	STD_STD_TIER
STD_INV_TYPE	STD_CATALOG_NO
STD_CATALOG_ID	STD_DEF_DISC_PCNT
STD_DEF_PUR_PRICE	STD_MANUFTR_ID
STD_HEIGHT	STD_WIDTH
STD_DEPTH	STD_WEIGHT
STD_CUBIC_FT	STD_SQUARE_FT
STD_ACTIVE_FLAG	STD_PRINT_IND

Selection Criteria for ITEM table	
STD_USERFLD1	STD_USERFLD2
STD_USERFLD3	STD_USERFLD4
STD_USERFLD5	STD_MAINT_LENGTH
STD_MIN_QTY	STD_MAX_QTY
STD_REORDER_LEVEL	STD_PRODUCT_GROUP
STD_SIF_FLAG	STD_PRICE_IN
STD_PRICE_OUT	STD_COLOR_FINISH
STD_TOUCHUP_COST	STD_REFURBISH_COST
STD_REPAIR_COST	STD_STOCK_ONLY_IND
STD_MISC_FLAG	STD_WEBENABLED_IND
STD_PRICE_ZONE_NO	ITS_USERFLD1
ITS_USERFLD2	ITS_USERFLD3
ITS_USERFLD4	ITS_USERFLD5
ITS_USERFLD6	ITS_USERFLD7
ITS_USERFLD8	ITS_USERFLD9
ITS_USERFLD10	STD_LIST_PRICE

Selection Criteria for ITEM SUPPLEMENTAL table	
ITS_COMP_CODE	ITS_CUS_NO
ITS_SERIAL_NO	ITS_STD_ID
ITS_USERFLD1	ITS_USERFLD2
ITS_USERFLD3	ITS_USERFLD4
ITS_USERFLD5	ITS_USERFLD6
ITS_USERFLD7	ITS_USERFLD8
ITS_USERFLD9	ITS_USERFLD10
STD_STD_CLASS	STD_STD_TIER
STD_INV_TYPE	STD_CATALOG_NO
STD_CATALOG_ID	STD_DEF_DISC_PCNT
STD_DEF_PUR_PRICE	STD_MANUFTR_ID
STD_HEIGHT	STD_WIDTH

Selection Criteria for ITEM SUPPLEMENTAL table	
STD_DEPTH	STD_WEIGHT
STD_CUBIC_FT	STD_SQUARE_FT
STD_ACTIVE_FLAG	STD_PRINT_IND
STD_USERFLD1	STD_USERFLD2
STD_USERFLD3	STD_USERFLD4
STD_USERFLD5	STD_MAINT_LENGTH
STD_MIN_QTY	STD_MAX_QTY
STD_REORDER_LEVEL	STD_PRODUCT_GROUP
STD_SIF_FLAG	STD_PRICE_IN
STD_PRICE_OUT	STD_COLOR_FINISH
STD_TOUCHUP_COST	STD_REFURBISH_COST
STD_REPAIR_COST	STD_STOCK_ONLY_IND
STD_MISC_FLAG	STD_WEBENABLED_IND
STD_PRICE_ZONE_NO	STD_MNFTR_PRICE_LIST
STD_LIST_PRICE	STD_BATCH_NO
STD_LIFESPAN_MONTH	STD_CREATED_DATE
STD_LST_UPDATE_DATE	ITE_DISPOSAL_DATE
ITE_ASSET_NO	ITE_ACCOUNTING_CODE
ITE_DEFAULT_COSTCTR	ITE_CREATED_DATE
ITE_LST_UPDATE_DATE	ITE_AVAIL_FOR_REUSE
ITE_DATE_AVAIL	ITE_LST_INV-DATE
ITE_LEASE_ID	ITE_LST_INV_BY
ITE_CUS_ORDER_LINE	ITE_CUS_ORDER_NO
ITE_LST_RECEIVE_DATE	ITE_CUS_ORDER_DATE
ITE_PURCH_PRICE	ITE_RECEIVE_PRICE
ITE_NET_BOOK_VALUE	ITE_MARKET_VALUE
ITE_STD_LIST_PRICE	ITE_YTD_DEPRECIATION
ITE_MTD_DEPRECIATION	ITE_LAST_DEPRECIATION_DATE
ITE_ACC_DEPRECIATION	ITE_RETIRED_IND
ITE_DEFAULT_DISCOUNT_PCNT	ITE_DISPOSAL_SELL

Selection Criteria for ITEM TRANSACTION table	
ITT_COMP_CODE	ITT_CUS_NO
ITT_SERIAL_NO	ITT_TRAN_CODE
ITT_ADJUSTMENT_IND	ITT_BATCH_NO
ITT_FUNCTION_CODE	ITT_HIDING_IND
ITT_ACCOUNTING_CODE	ITT_COSTCTR_NO
ITT_TRAN_DATE	ITT_BUILDING_ID
ITT_LOCATION_ID	ITT_CONDITION
ITT_FROM_BUILDING_ID	ITT_FROM_LOCATION_ID
ITT_FROM_CONDITION	ITT_STD_ID
ITT_CUS_ORD_NO	ITT_DISPOSAL_IND
ITT_WKN_NUM	ITT_TRAN_QTY
ITT_SHARE_PIECE_IND	ITT_TRANSACTIONID

Selection Criteria for ITEM MAINTENANCE table	
ITM_COMP_CODE	ITM_CUS_NO
ITM_SERIAL_NO	ITM_STD_ID
ITM_MAINT_DONE_DATE	ITM_MAINT_DUE_DATE
ITM_MAINT_MONTHS	ITM_Maint Lbr Hour
ITM_Maint_Matl	ITM_Maint_Overhead
ITM_Maint_Cost	ITM_MEMO

Selection Criteria for STANDARD ATTRIBUTES table	
STR_COMP_CODE	STR_CUS_NO
STR_STD_ID	STR_ATTR1_DESC
STR_ATTR2_DESC	STR_ATTR3_DESC
STR_ATTR4_DESC	STR_ATTR5_DESC
STR_ATTR6_DESC	STR_ATTR7_DESC
STR_ATTR8_DESC	STR_ATTR9_DESC
STR_ATTR10_DESC	

Selection Criteria for STANDARD CLASS table	
STC_COMP_CODE	STC_CUS_NO
STC_STD_CLASS	STC_WEB_ENABLED_IND
STC_DESC1	STC_DESC2
STC_DESC3	STC_DESC4
STC_DESC5	STC_DESC6
STC_Touchup_Cost	STC_Refurbish_Cost
STC_Repair_Cost	

Selection Criteria for STANDARD table	
STD_COMP_CODE	STD_CUS_NO
STD_SERIAL_NO	STD_STD_ID
STD_STD_CLASS	STD_STD_TIER
STD_INV_TYPE	STD_CATALOG_NO
STD_CATALOG_ID	STD_DEF_DISC_PCNT
STD_DEF_PUR_PRICE	STD_MANUFTR_ID
STD_HEIGHT	STD_WIDTH
STD_DEPTH	STD_WEIGHT
STD_CUBIC_FT	STD_SQUARE_FT
STD_ACTIVE_FLAG	STD_PRINT_IND
STD_USERFLD1	STD_USERFLD2
STD_USERFLD3	STD_USERFLD4
STD_USERFLD5	STD_MAINT_LENGTH
STD_MIN_QTY	STD_MAX_QTY
STD_REORDER_LEVEL	STD_PRODUCT_GROUP
STD_SIF_FLAG	STD_PRICE_IN
STD_PRICE_OUT	STD_COLOR_FINISH
STD_TOUCHUP_COST	STD_REFURBISH_COST
STD_REPAIR_COST	STD_STOCK_ONLY_IND
STD_MISC_FLAG	STD_WEBENABLED_IND

Selection Criteria for STANDARD table	
STD_PRICE_ZONE_NO	STD_MNFTR_PRICE_LIST
STD_LIST_PRICE	STD_BATCH_NO
STD_LIFESPAN_MONTH	STD_CREATED_DATE
STD_LST_UPDATE_DATE	STD_DEF_DISC_PCNT
STD_BATCH_NO	

Appendix C

Global Adjustments and Updating Standard Pricing

Appendix C outlines rules for updating Standard pricing fields within the Global Adjustment module. The Standard pricing fields are:

- Default Purchase Price
- Default Discount Percentage
- List Price

It is recommended when you are using the Global Adjustment screen to update Standard pricing that you take the following into consideration.

The Default Purchase Price and Default Discount Percentage fields within the Standard table are reliant on one another. If a value is entered in the Default Purchase Price, the Default Discount Percentage is calculated based on the price. If a value is entered in the Default Discount Percentage, the Default Purchase Price is calculated based on the percentage entered.

If both Default Purchase Price and Default Discount Percentage exist on the spreadsheet, when the information is submitted to SnapTracker for processing, SnapTracker updates the Default Purchase Price as entered on the spreadsheet and then uses it to calculate the Default Discount Percentage.

List Price is not a calculated field. An entry must be made on the spreadsheet in order to update or add a List Price.

If you want to update these fields, you only need to include one field on the spreadsheet. SnapTracker updates both fields when the data is submitted for processing.

Appendix D

Editing Information on the Global Adjustments Spreadsheets

The Excel spreadsheet needs to be in a pre-specified format. There are some rules within the spreadsheet you need to follow in order for the upload to run smoothly.

- Within Excel, the sheet name must be Sheet 1. (This is the default name assigned by Excel). The actual filename can be anything you would like.
- The columns within the spreadsheet need to have the data format set of Text. This enables you to upload data that has a mixed data type.

Instructions: To change the data type, follow these instructions:

Highlight a column (each column must be changed individually).

From the Menu Bar, select **Data, Text to Columns**.

A pop up window displays.

Click **Next** twice.

From the Column Data Format selections, click **Text**.

Click **Finish**.

Note: When the data type is defined this way for a cell, the cell is displayed exactly as entered. This ensures leading zeros for example are not dropped within the spreadsheet. For example, if your Location is 01011 and this is entered in a numeric cell in Excel, the number is changed to 1011. When the batch is processed, any records with an incorrect Location return an error of Location NOT found.

- Optional columns can be hidden or deleted in the spreadsheet if you do not want to use the field.
- You can modify the order of the columns within the spreadsheet if you want. You need to maintain the column names.

Note: Blank lines are imported into the application as well. Ensure any empty lines are deleted. If the lines are blank, the records are discarded when the batch SnapTracker creates is processed.

Using these rules, enter the information in the spreadsheet and save it.