

Item Data Management

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Purpose of this document

This document is designed to demonstrate how to use the Item Batch Update report to update Item Data. This allows you to quickly update Item Data based on desired filtering.

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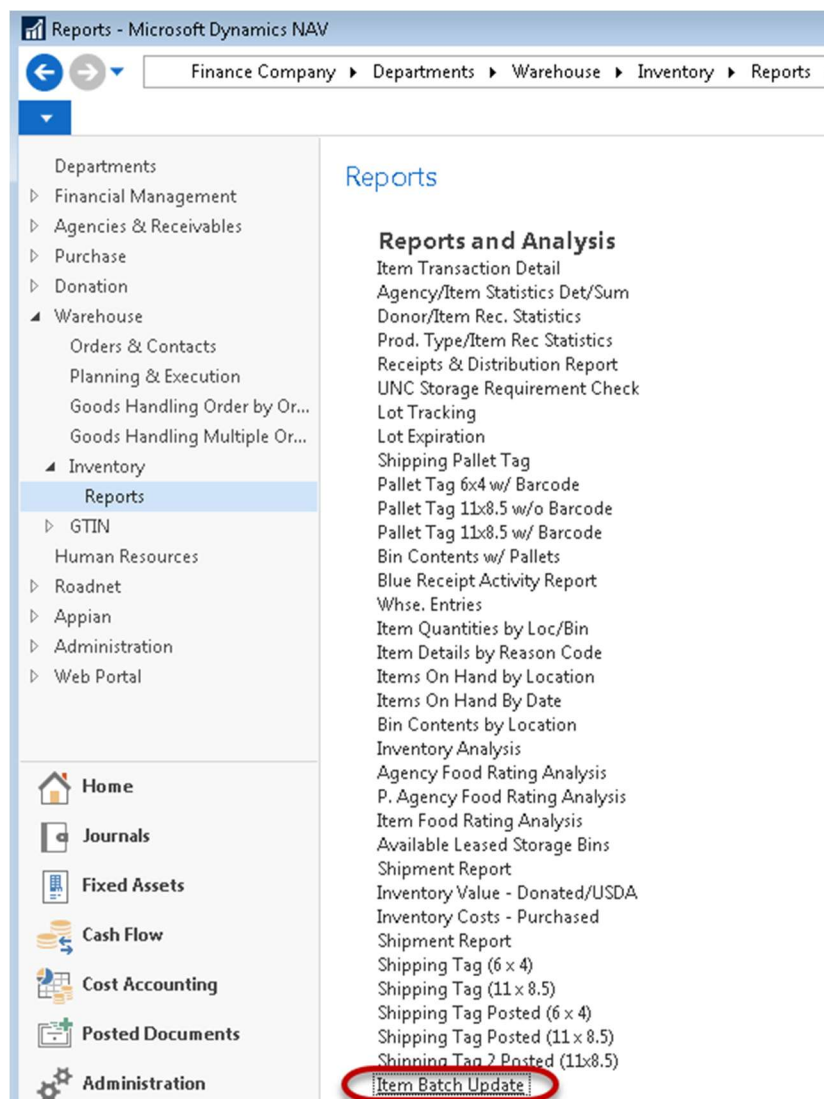
Purpose

The Item Data Management functionality provides food banks with the ability to mass update certain Item fields and allows you select/filter for the Items to be updated. An Excel output is provided after the process has been run to provide the user with immediate feedback as to any errors, and which Items/data have been updated.

Ceres Object release 4.51.49 is required for the functionality described in this document.

Item Batch Update Report

1. The Item Batch Update report link can be found at Departments → Warehouse → Inventory → Reports → Item Batch Update.



2. When you run the Item Batch Update process you can drill down on the Item Update Field List to view the available fields to update.



Edit - Item Batch Update

ACTIONS

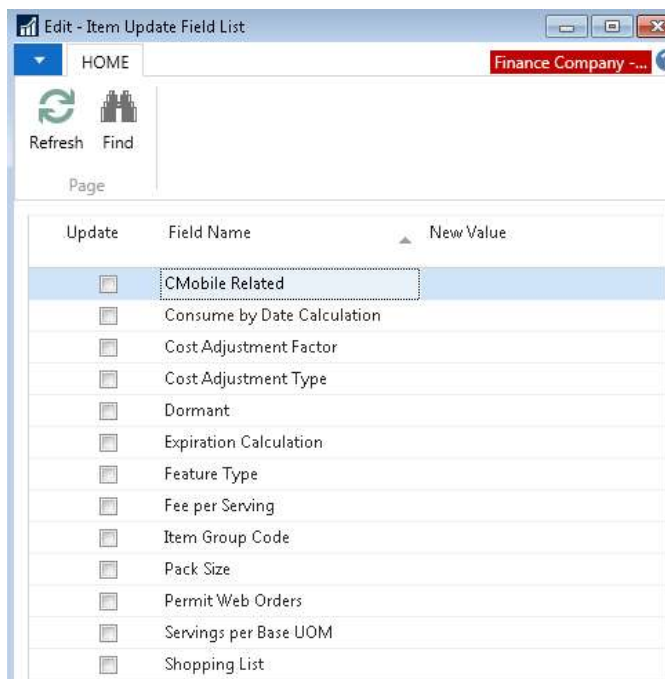
Clear Filter

Page

Option

Item Update Field List:

A new window is displayed showing the list of available fields. You can populate the “New Value” column of any of the fields to update the data. When a value is added to the “New Value” column the “Update” column automatically gets checked to let the system know the field will be updated.



Edit - Item Update Field List

HOME

Refresh Find

Page

Update	Field Name	New Value
<input checked="" type="checkbox"/>	CMobile Related	
<input type="checkbox"/>	Consume by Date Calculation	
<input type="checkbox"/>	Cost Adjustment Factor	
<input type="checkbox"/>	Cost Adjustment Type	
<input type="checkbox"/>	Dormant	
<input type="checkbox"/>	Expiration Calculation	
<input type="checkbox"/>	Feature Type	
<input type="checkbox"/>	Fee per Serving	
<input type="checkbox"/>	Item Group Code	
<input type="checkbox"/>	Pack Size	
<input type="checkbox"/>	Permit Web Orders	
<input type="checkbox"/>	Servings per Base UOM	
<input type="checkbox"/>	Shopping List	

Update: This field gets automatically checked when you enter a value in the “New Value” column. The user can manually check/uncheck this field. If it is checked then the system will update the field data, and if it is not checked, the system will skip it.

Field Name: The field name from the Item Card/List that you would like to update.

New Value: The value that you want to populate/update for desired Items. You can drill down on this column for fields that have options to select.

3. You can then filter for the Items that you want to update.

Item

Sorting: No.

Show results:

Where No. is Test001..Test002

And Pack Size is Enter a value.

And Shopping List is Select a value

And Feature Type is Select a value

And Cost Adjustment Type is Select a value

And Cost Adjustment Factor is Enter a value.

And Item Group Code is Enter a value.

And Servings per Base UOM is Enter a value.

And Fee per Serving is Enter a value.

And Expiration Calculation is Enter a value.

And Consume by Date Calculation is Enter a value.

And Permit Web Orders is Select a value

And Dormant is Select a value

And CMobile Related is Select a value

+ Add Filter

NOTE: All Items meeting the filtered criteria will be updated. **If no filter is specified ALL Items will be updated.**

4. After the report has run an excel sheet opens showing you which Items have been changed, which fields have been changed, and any errors if the report encountered any. **This excel sheet must be manually saved, if you want to keep it for logs.**

Item Update List							
10/30/18 10:51:22 AM							
SWPROS\JBL							
Item No.	Description	Field Name	Error	Error Message	Expiration Calculation	Feature Type	Dormant
TEST001	Test Item 1				1D	Free Item	No
					2D	New Item	No
TEST002	Test Item 2				1D	Free Item	No
					2D	New Item	No

NOTE: The first row for an Item in the Excel spreadsheet is the old value of fields. The second row is the new value.

Related Topics:

1. Item Overview