



RMH ADVANCED ITEM AND INVENTORY WIZARDS

Retail Management Hero (RMH)

rmhsupport@rrdisti.com www.rmhpos.com

Copyright 2016, Retail Realm. All Rights Reserved. RMHDOCWIZARD050916

Disclaimer

Information in this document, including URL and other Internet Web site references, is subject to change without notice. Unless otherwise noted, the example companies, organizations, products, domain names, e-mail addresses, logos, people, places and events depicted herein are fictitious, and no association with any real company, organization, product, domain name, email address, logo, person, place or event is intended or should be inferred. Complying with all applicable copyright laws is the responsibility of the user.

Without limiting the rights under copyright, no part of this document may be reproduced, stored in or introduced into a retrieval system, or transmitted in any form or by any means (electronic, mechanical, photocopying, recording, or otherwise), or for any purpose, without the express written permission of Retail Realm. Retail Realm or Retail Hero may have patents, patent applications, trademarks, copyrights, or other intellectual property rights covering subject matter in this document. Except as expressly provided in any written RMH license agreement, the furnishing of this document does not give you any license to these patents, trademarks, copyrights, or other intellectual property.

The document, SDK help file and demo projects are subject to the Partner's non-disclosure and VAR agreements signed by Retail Realm.

© 2016 Retail Realm. All rights reserved. Doc ID: RMH_How-To_Wizards_0501016. Publication date: June 2016

Support is provided through the RMH support system: <http://support.rrdisti.com/account/login>.

RMH Product Website: www.rmhpos.com

RMH Wizards

RMH provides many wizards you can use to quickly make multiple changes to your database – all at the same time. The following guides you through the Advanced Item Update Wizard and Inventory Wizard.

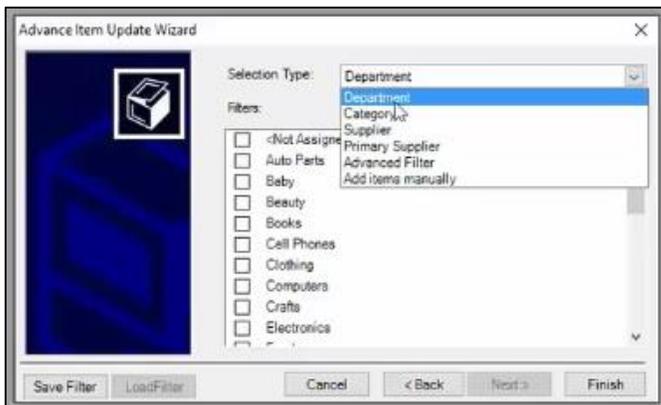
Online Training Video: <https://vimeo.com/album/3520470/video/160322879>

Advanced Item Update Wizard

The Advanced Item Update Wizard allows you to easily and quickly change multiple desired item properties in RMH en masse using an Excel-like screen. For example, update item prices, price levels and cost prices.

Tip: If you want to change only a single field for multiple items, use the Inventory Wizard.

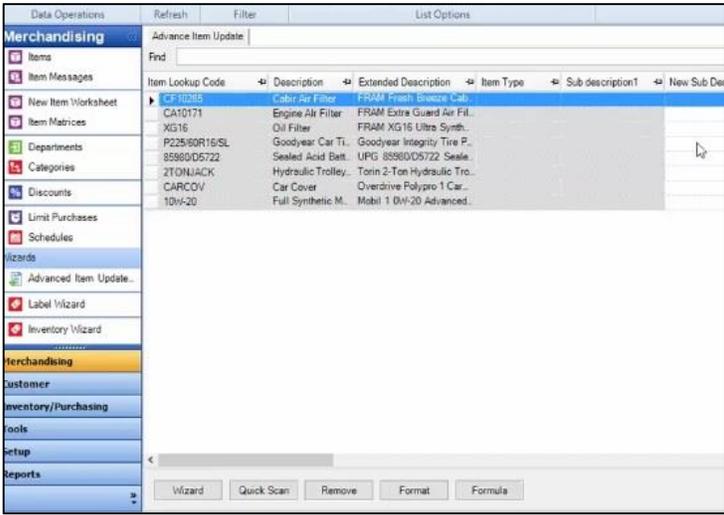
1. Log onto the **RMH Store Manager**.
2. Click the **Merchandising** option in the left navigation pane, navigate to the **Wizards** section, and then select the **Advanced Item Update Wizard** option.
3. On the Welcome screen, click **Next**.
4. Select the type of items you want to change. For example, Department, Category, Supplier, etc.



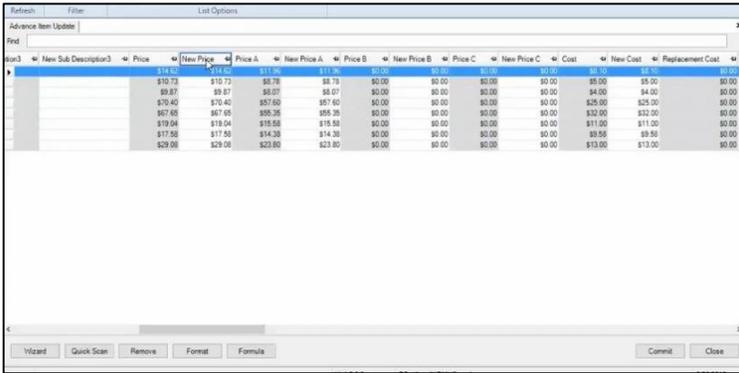
Or, use an Advanced Filter, which lets you select a subset of items to change (by item lookup code).



5. After selecting the type of items to change, click **Finish**. The system will then display on a grid all the items that match the specified filter criteria along with their detailed field information that was entered during the item setup process. Use the arrow bar at the bottom of the screen and scroll to the right to display additional fields. See following sample figure.

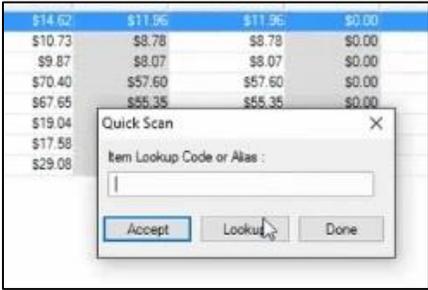


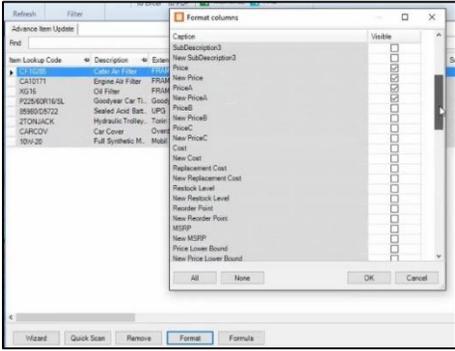
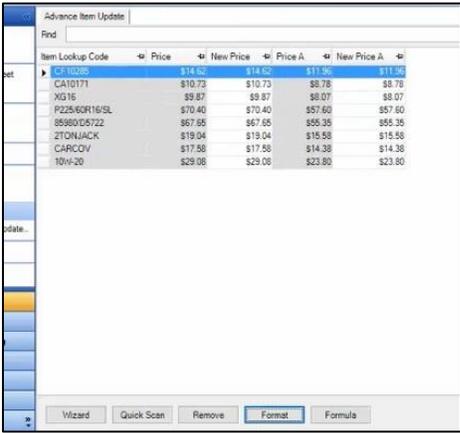
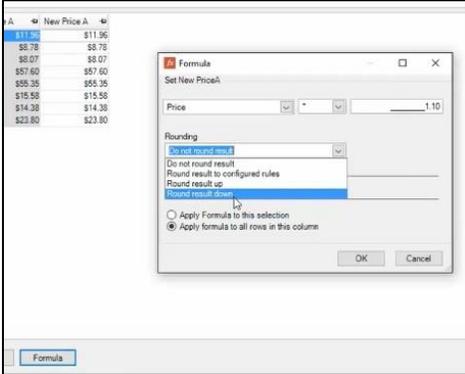
6. Each field provides two columns – one with the existing data and the other with the desired updated data. In the **New** column for the applicable item field, enter the updated data (price, etc.). For example, to change an existing item price, enter the updated price in the **New Price** column.



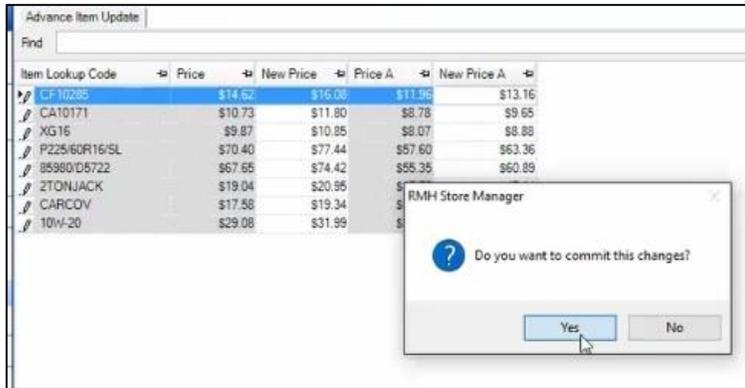
This screen also offers various options to facilitate item updates.

Button	Description
Wizard	Clicking this button displays the Wizard again, enabling you to select additional items for updates
Quick Scan	Clicking this button lets you quickly enter or scan a barcode; clicking the Lookup button lets you add more items to the list. Clicking Done will close the window and populate the item grid with the items



<p>Remove</p>	<p>Clicking this button will delete the desired items from the existing list</p>
<p>Format</p>	<p>Clicking this button enables you to select specific columns you want to work on; for example, if you check the fields for Price, New Price, Price A, and New Price A, as shown in the following figure:</p>  <p>The system will then update the item list to display only those columns selected, as shown in the following figure:</p> 
<p>Formula</p>	<p>Clicking this button lets you define how you want RMH to calculate the new/updated prices. For example, increase prices by a specific percentage, select a rounding rule, and/or apply the formula to a select row or all rows in a column. Clicking OK will close the pop-up window and apply the changes to the grid's New column</p> 

7. After making all the applicable changes to the grid, click the **Commit** button and confirm the action.



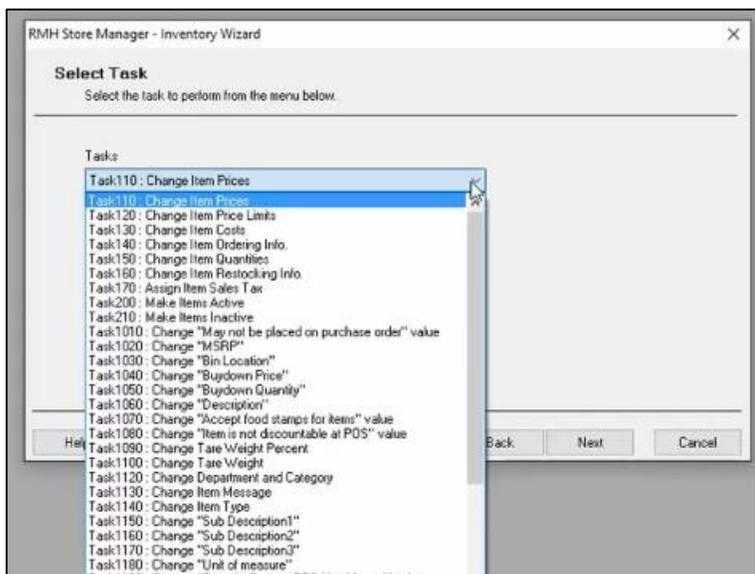
The system will then update the database and you can exit the wizard.

Inventory Wizard

The Inventory Wizard is ideal for quickly updating a single field for multiple items at the same time.

Online Training Video: <https://vimeo.com/album/3520470/video/160322879>

1. Log onto the **RMH Store Manager**.
2. Click the **Merchandising** option in the left navigation pane, navigate to the **Wizards** section, and then select the **Inventory Wizard** option.
3. On the Welcome screen, click **Next**.
4. On the Select Task screen, select the desired task. For example, 'Change Item Costs' or 'Change Item Type.'

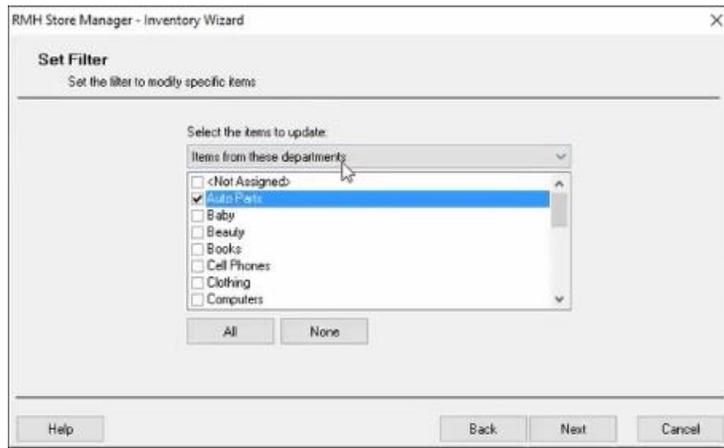


Note: Some of the tasks in this drop-down list box were preserved from the Microsoft Dynamics RMS inventory wizard. RMH includes many additional task options that allow you to use the wizard to change any item property.

5. After selecting the task, click **Next**.

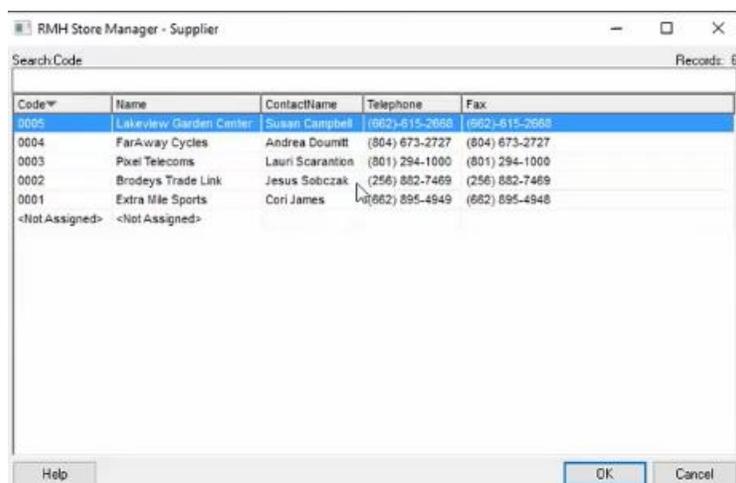
Note: For sample demonstration purposes, the following guidelines assume that the 'Change Primary Supplier' task was selected.

- Specify the item filter by defining the filter and then checking the applicable box(es). The available drop-down list box lets you select items by department, category, supplier, or add items manual or from the filter.

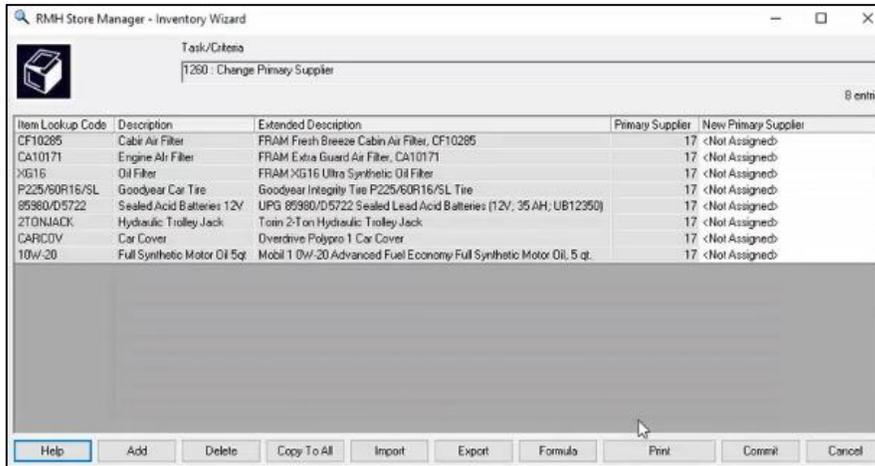


Note: In this scenario, the 'Not Assigned' option will apply the change to all items that currently do not have an assigned supplier.

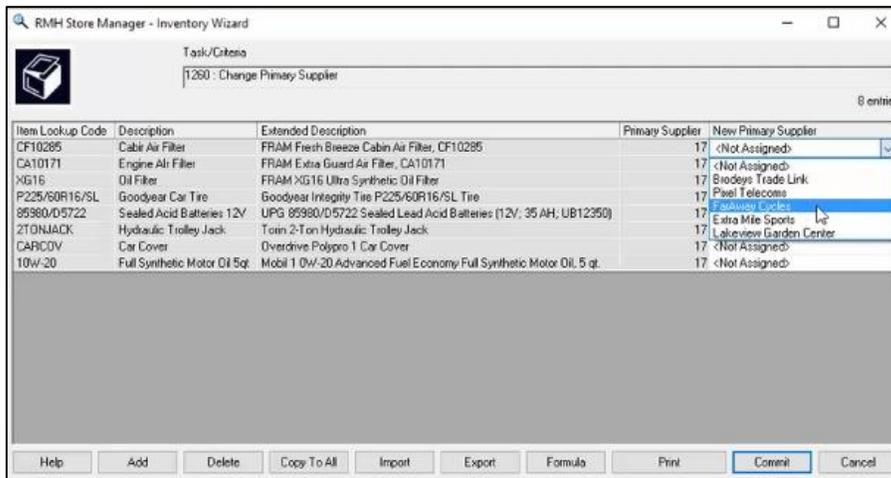
- Click **Next** to continue.
- Select the **Primary Supplier** from the available list, and then click **OK**.



- Click **Next** to continue, and then click **Finish**. A grid will display that shows all the items that matched the filter criteria. See following figure:



10. In the **New** column, edit the fields as desired. For this example, clicking in the white field in the **New Primary Supplier** column will display a drop-down list of all the existing suppliers in the database.



This screen also offers the various functions:

Button	Description
Copy To All	The Copy To All button at the bottom the screen will copy the information in the top row of the New column and automatically apply the information to remainder rows in that column.
Add/Delete	Click the applicable button to manually add or remove items from the grid.
Import/Export	Click these buttons to import/export the data from/to an Excel file. For example, to make changes and then use the Import button to update the RMH database.
Formula	Use this button to create special calculations. For example, for Price field changes, you can apply specific prices based on mathematical formulas. Note that formulas cannot be applied to text fields and thereby would not apply to Suppliers, for instance.
Commit	Clicking this button applies the changes to the database. After confirming the changes, the system will display a notification window with the number of records that were updated.

11. Click **Commit** to apply the changes to the database.