

# Customized List of SKUs

Item Lists allow you to create a customized list of SKUs and then use it to easily select items to include in a particular process or report.

When the standard 'From/To' and Code selection criteria are not sufficient in a report or function, you can now use an Item List.

In this course we will review how and when Item Lists are used and the Types available. We will also walk through the process to Add, Delete and Change them.

## Topics

- Item List Overview
- Adding Item Lists
- Deleting Item Lists
- Changing Item Lists

## Item List Overview

Item Lists can be used in the following applications:

- The Order Point Report or ROP
- The Suggested Order Report or RSO
- Eagle Mobile Physical Inventory
- The Physical Inventory Process (to add items to a count or to print count sheets)
- Printing Labels
- And finally, Dynamic Promotions

There are several List Types available when creating a new group of items. These include:

Type 'B', for BOGO, used in Dynamic Promotions.

Type 'L' is used when creating lists for Label Printing.

'O' Type lists are used for Ordering with the RSO and ROP reports.

And finally Type 'P' lists are utilized during Physical Inventory.

## Adding Item Lists

Item lists are created using the Item List Maintenance viewer.

To open the viewer, type 'Lists' into the Eagle Browser launch bar.

Once the viewer is open, select 'Add List' to begin defining it.

You are prompted to give your list a unique name, ideally one that will allow you to recognize what's in it without having to open it each time.

For this example we will create a Dynamic Promotion list and call it 'Battery Promotion'.

Next, select 'B', Dynamic Promotions as the 'List Type'.

Determine what Store will utilize this List.

Add any relevant 'Comment' that help to describe the items on or function of this List.

If you want to start with an empty grid, make sure 'Y' is in the 'Clear Grid?' field.

If you're adding items to an existing list to create a new one, you will set this field to 'N'.

Finally, decide how you want to Add the Items to the list. If this is a small list and you know the SKUs of the items. Adding them one at a time may be easiest. For longer lists, it makes sense to import a file or use a viewer to select items.

Let's use a 'Viewer' for this Battery Promotion list.

Press 'OK'.

The Inventory Viewer is now open.

Click 'Change Lookup' and select 'Description' and press 'OK'.

Type 'Batteries' and press Enter.

Add checkboxes if necessary, and mark the batteries that are eligible for your promotion.

Then press 'Select' to add them to your Item List.

You now have an Item List that can be used for any Dynamic Promotion.

## Deleting Item Lists

Item Lists will stay in your system until you remove them manually or set the option to do so automatically. It may be that you use an Item List again and again if you repeat a promotion throughout the year.

If you know that you'll only be using an Item List for a single promotion, you can delete the list when the promotion is over by pressing 'Delete List', here. Click 'Yes' to confirm and the Item List is successfully removed.

You can also select the checkboxes in the viewer and delete multiple lists at once.

Lists will not delete if they are associated with an Active Dynamic Promotion.

If you want to avoid the manual process of deleting Item Lists you can use Options ID number 9850 to allow Eagle to purge them after the number of days you specify.

The Item List will be deleted once its 'Updated' date is older than the number of days entered in this option and the Dynamic Promotions which use it are no longer Active.

## Changing Item Lists

You can Change individual Item Lists as needed.

To open the Item Lists Header Viewer, click in the 'All Lists' hyperlink in the Item List Maintenance Viewer.

You may also click the 'Misc' button and choose 'Maintain All Item Lists'.

You have full grid functionality here and you can see that each list is assigned a 'List ID'.

'Physical' 'List Types', used when conducting Physical Inventory, utilize the 'Assigned' field and the 'Count List Locked' status.

Be sure to watch the Training on Demand course titled 'Streamlined Physical Inventory Process' for more information on Physical Type Lists.

Use the 'List Type' drop down menu to view 'All' List Types or specify one.

We will examine a 'Label' Type List. Choose 'L' and press 'Refresh'.

Double click on the Item List to view its contents.

From here you can 'Add' or 'Delete' SKUs as needed.

Check a line and click 'Delete'. Confirm your action.

Press 'Add' and enter a SKU. Click 'Cancel' to close the window.

When the Change Button is selected you can alter the 'List Type', the 'Store' field and add or update 'Comments'.

You can even change the 'List Name'.

Press 'OK' to save your changes.

Item Lists are an invaluable tool for streamlining Physical Inventory and Suggested Ordering, to more easily print Labels, and to provide flexibility within Dynamic Promotions.

Simple mouse clicks allow you to Add and make Changes while automating the deletion process keeps your Eagle data manageable and accurate.

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