

AGENDA

PBM 201: Taking It to the Next Level

March 16-17, 2011

9:00 a.m. – 4:00 p.m.

Location: CMI Headquarters
7520 E. Independence Blvd Suite 400
Charlotte, NC 28227

Wednesday, March 16

8:45 a.m. – 9:00 a.m.	Registration Continental Breakfast
9:00 a.m. – 9:15 a.m.	Welcome Presentation and introductions Guidelines for the day's activities
9:15 a.m. – 10:15 a.m.	Invoice & Pricebook Imports File Formats Import Setups & Functions Importing & Posting Pricebook Files & Invoices
10:15 a.m. – 11:15 a.m.	Item Groups & Price Groups Setup Assigning Item & Price Groups to Items Various Uses of the Item & Price Groups
11:15 a.m. – 12:15 p.m.	Stores Selection in Pricebook Setup Uses
12:15 p.m. – 1:15 p.m.	Lunch
1:15 p.m. – 2:15 p.m.	Rebates and Alternative Methods Rebate Function in PBM Alternative Methods to Rebate Function in PBM Rebate Reporting
2:15 p.m. – 3:15 p.m.	Pricebook Integrity Reports Pricebook Zone Exceptions Pricebook Exceptions Pricebook Integrity Check
3:15 p.m. – 4:15 p.m.	Mix and Match Combos Setup Item List Setup Mix/Match Setup Combos
4:15 p.m.	Class Adjourned

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Thursday, March 17

9:00 a.m. – 9:15 a.m. **Welcome**
Recap of topics previously discussed
Guidelines for the day's activities

9:15 a.m. – 10:15 a.m. **Lottery**
Lottery Setups
Lottery Games Setup
Lottery Transactions

10:15 a.m. – 11:15 a.m. **Purging Pricebook**
Purge Pricebook Utility

11:15 a.m. – 12:15 p.m. **Item Level Physical Counts**
Entering and Posting the Item Level Count
Physical Count Import/Export
Inventory Valuation Report
Category Physical Count

12:15 p.m. – 1:15 p.m. **Lunch**

1:15 p.m. – 2:15 p.m. **Excel Addin**
Functions
How to Create Excel Addin Reports

2:15 p.m. – 4:00 p.m. **User Defined Question & Answer Session**
This is your opportunity to decide what YOU want to learn. Would you like to know more about a topic we did not list above? Let us know! You will be asked to submit your topic suggestions and/or questions after you register. We will try to answer all topics/questions during class, but, if time does not allow, we will work with you on an individual basis.

4:15 p.m. **Class Adjourned**
