Chapter 2 – Shopping

Catalog Search

*Note: To advance from slide to slide press your **Page Down** key*
Or the right button on your mouse

Shopping > Catalog Search

- ### The Catalog Tab

- ### Global Searches (search for)

  - Products

  - Categories

  - Suppliers

- ### Drill Down the Catalog Structure

- ### Search within a Catalog

- ### Search within one Supplier

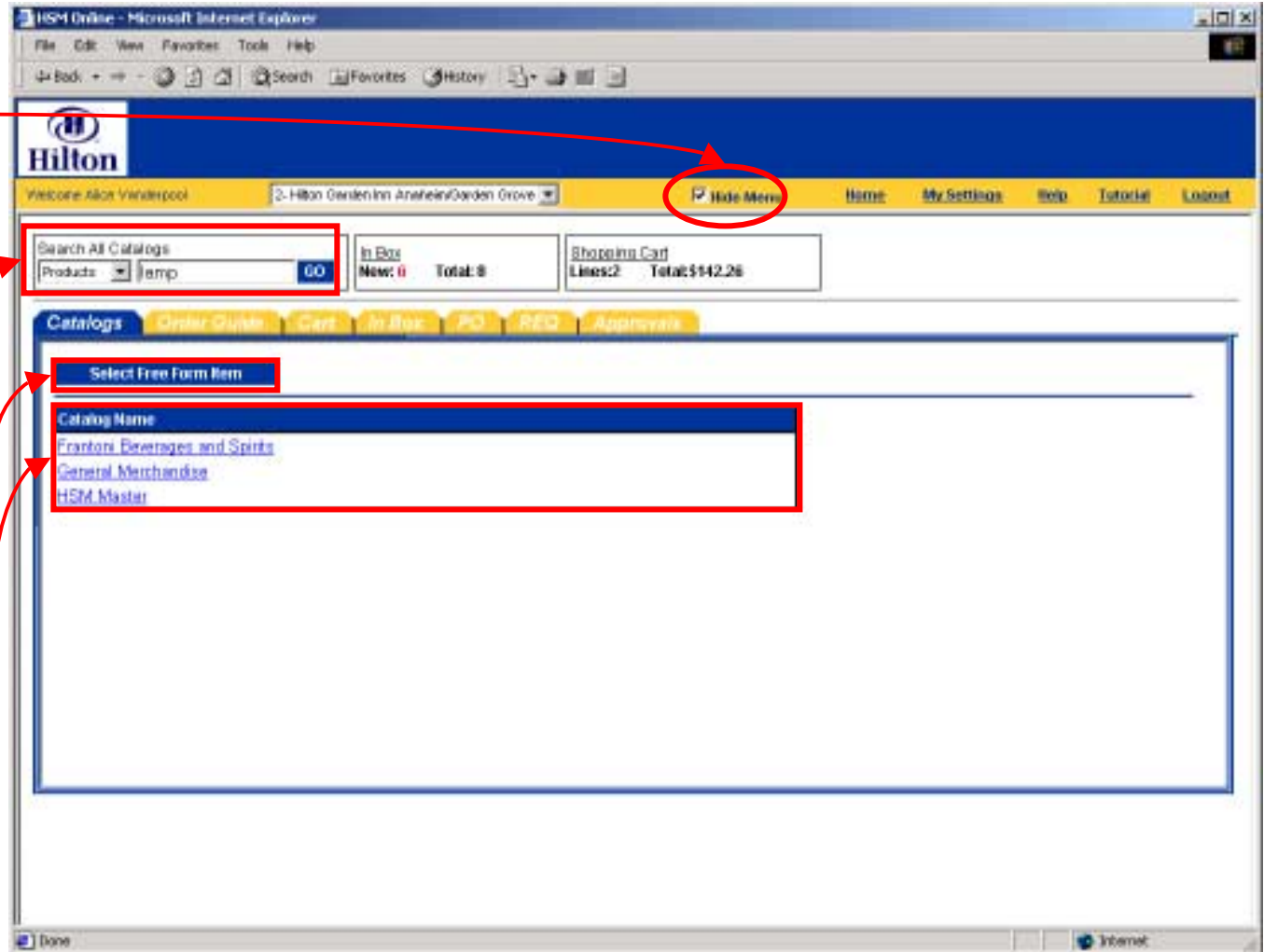- ### Selecting Products

- ### Adding Non-Catalog Items

Shopping > Catalog Search > The Catalog Tab

You can always return to this view by clicking on the 'Home' link

The Search area allows you to globally search all catalogs. (explained later)

Click here to add Non-Catalog items (explained later)

The Catalog Homepage shows the names of the catalogs you have access to

A 'global search' searches **all available** catalogs. Select either

- Product
- Category or
- Supplier

Depending on what you are looking for

For example if you want to search for a Floor Lamp.

Select 'Product' from the pull down menu

Type 'Lamp' and hit the 'Go' button.
Note: the system supports wild card searches. You do not need to use the * symbol. For instance, instead of 'Lamp' you can type 'Lam' also. However a blank field will return no values.

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Shopping > Catalog Search > Global Search > Product

The result will be a global listing (across all catalogs and suppliers) of all products that contain the word 'Lamp' in the product name, description or number.

Click on the 'More Product Info' to display more detail about the item.

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Shopping > Catalog Search > Drill Down within Catalog

There are other ways to arrive at the same result, depending on what you know about the product.

You can browse through the catalog or search within a supplier

Return to the catalog homepage by clicking the 'Home' button.

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Shopping > Catalog Search > Drill Down within Catalog

If you know which catalog the floor lamps are in, select it from the list.

For our example, click on General Merchandise

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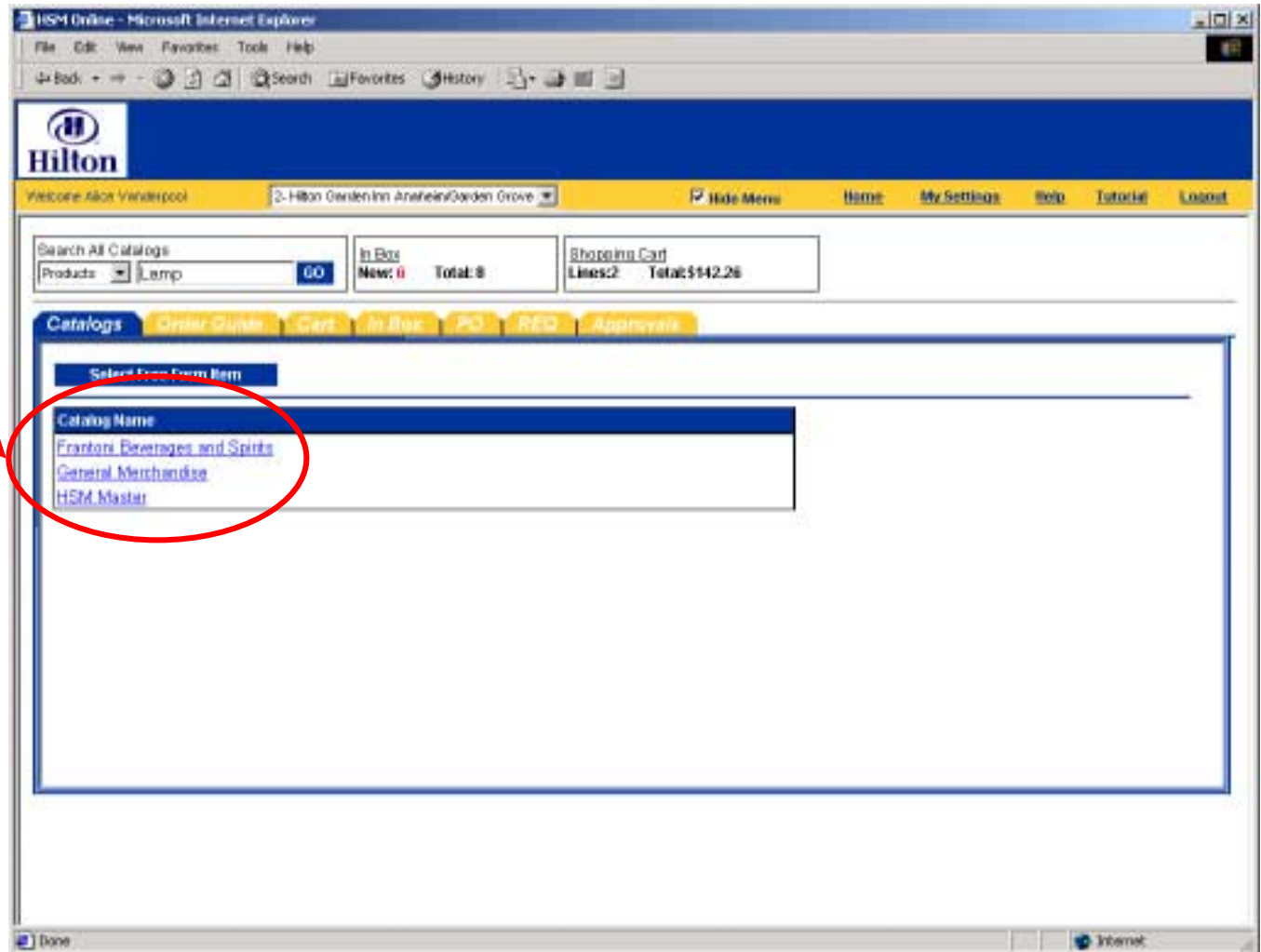
Shopping > Catalog Search > Drill Down within Catalog

FYI: you can hit the 'Up' button to ascend one level

Name of the selected catalog

The result will be a list of top level categories within that catalog. Clicking on the category links will show the corresponding products (or further subcategories if applicable)

For our example, click on Electronics & Lighting
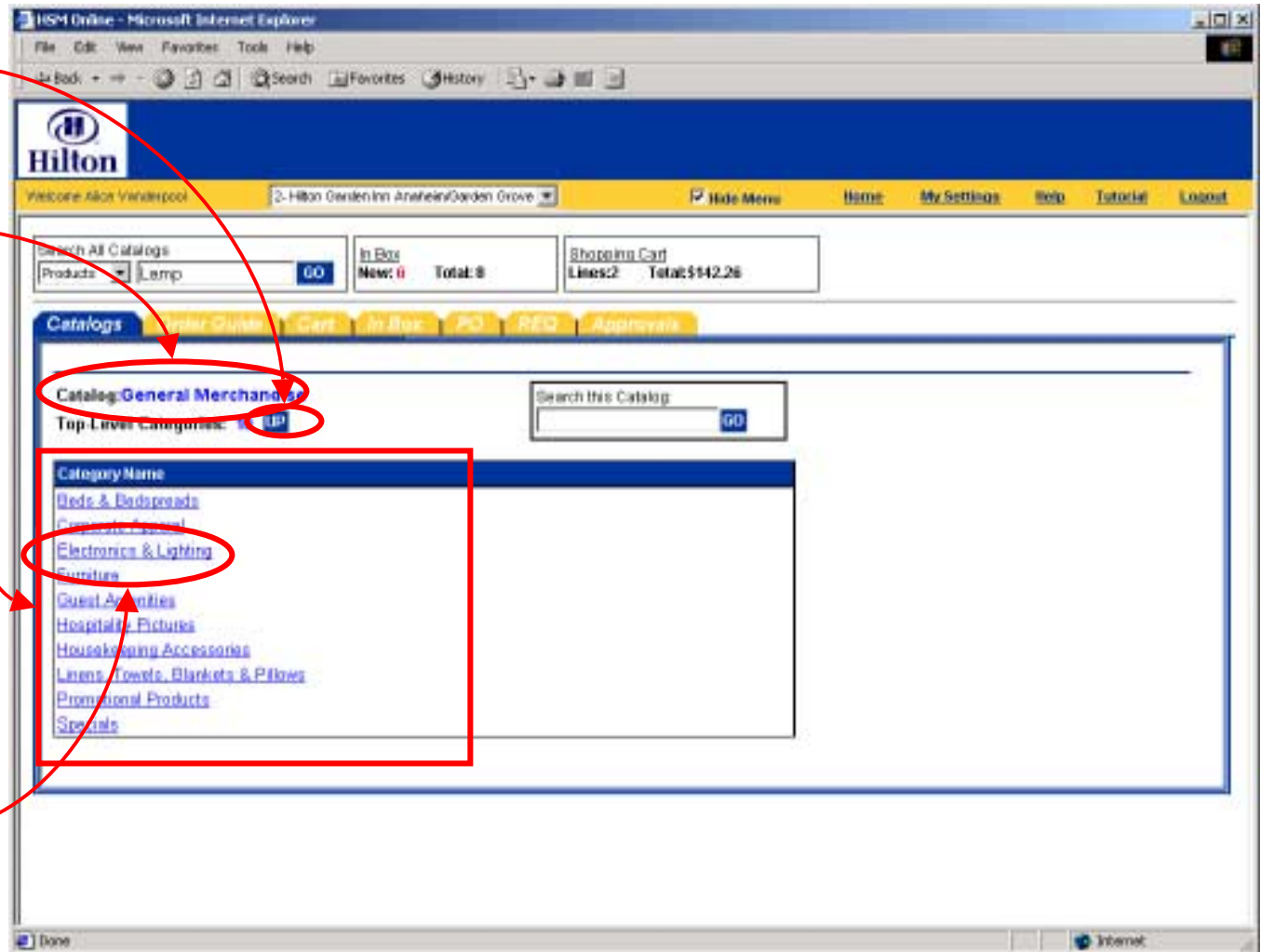
Shopping > Catalog Search > Drill Down within Catalog

The number of possible drill downs depends on how many subcategories are defined

For our example, click on Lighting

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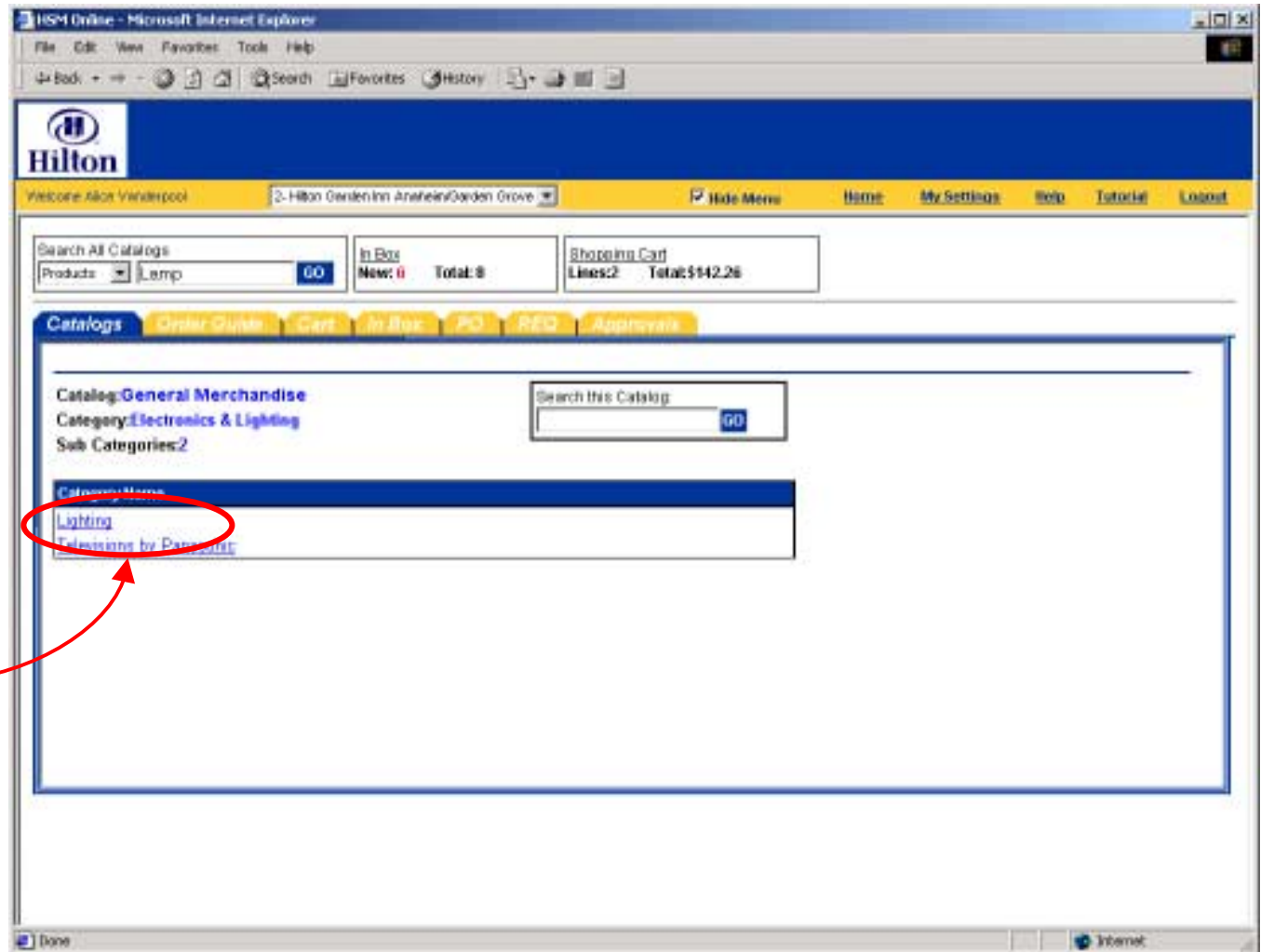
Shopping > Catalog Search > Drill Down within Catalog

To finally arrive at the product level click on the remaining subcategory name Floor Lamps

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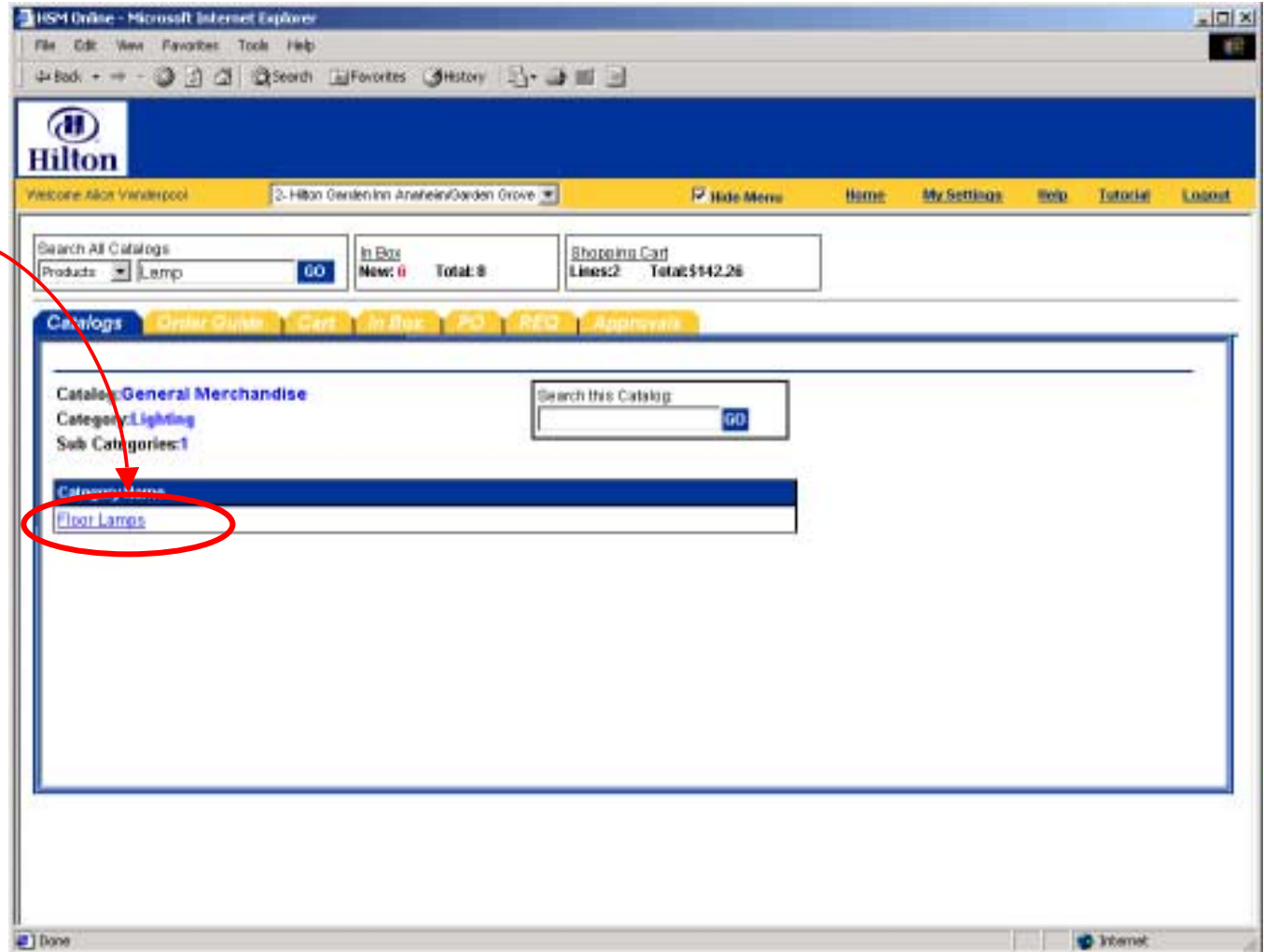
Shopping > Catalog Search > Drill Down within Catalog

Your final result will be the same as if you would have done a global search for the product.

There is a way to search within a catalog without having to drill all the way through the subcategories. Please go back to the catalog homepage.

Return to the catalog homepage by clicking the '**Home**' button.

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Shopping > Catalog Search > Search within Catalog

Select the catalog that contains floor lamps

Click on
General Merchandise

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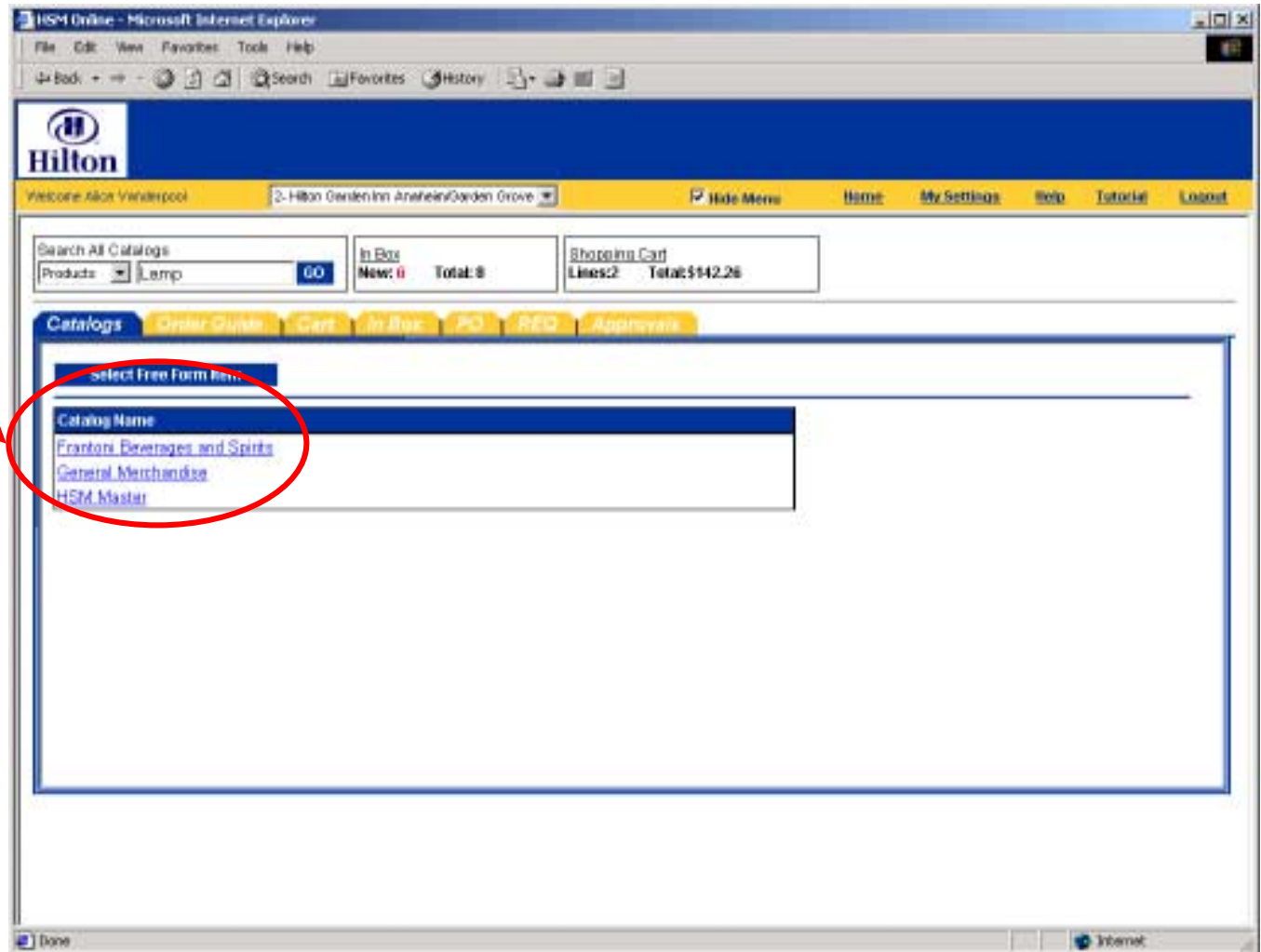
Shopping > Catalog Search > Search within Catalog

To search the catalog <u>General Merchandise</u> only, type 'Lamp' in the search field and hit 'Go'
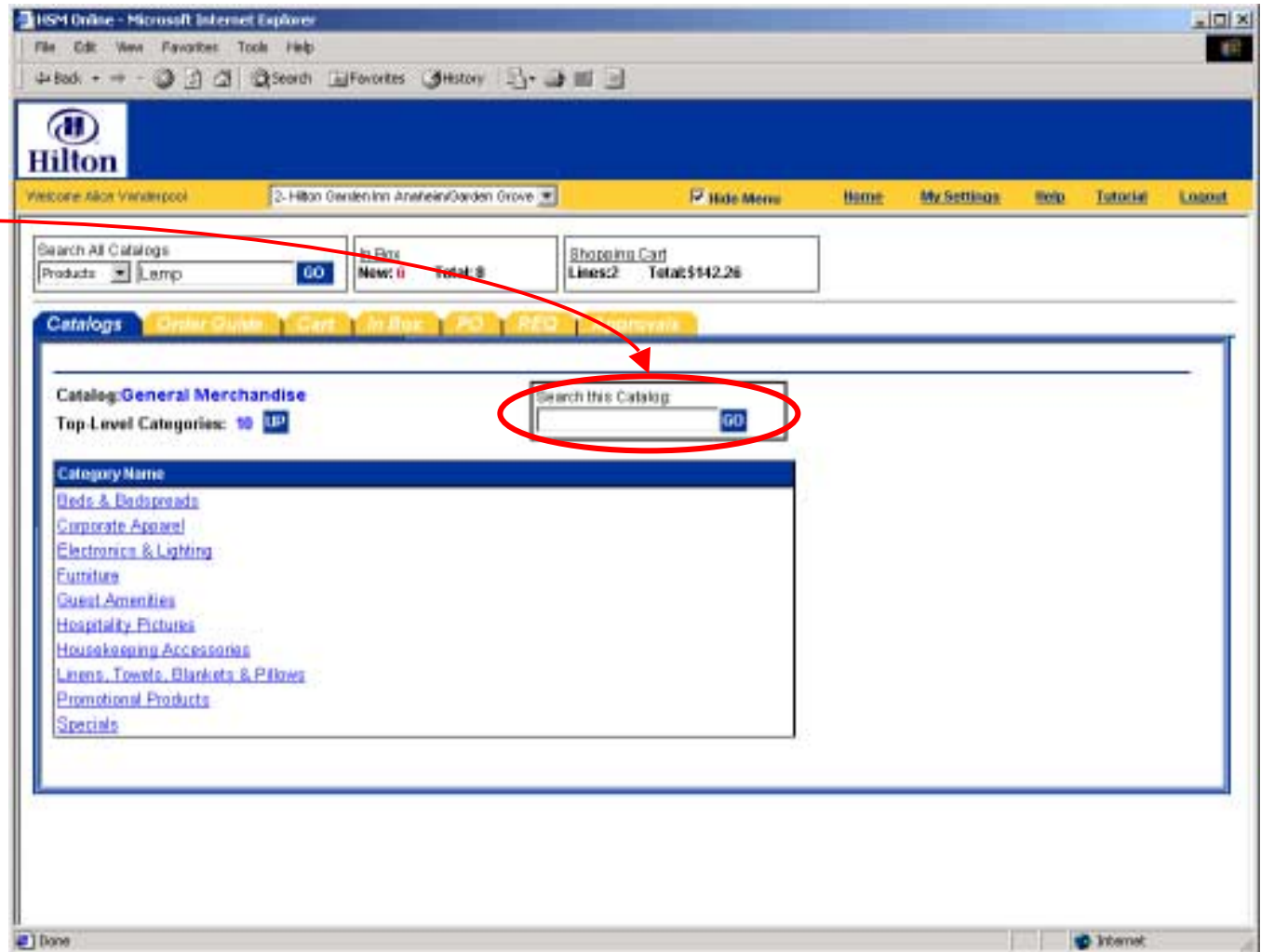
Shopping > Catalog Search > Search within Catalog

The result will be a list of all products within the selected catalog that contain the word 'Lamp' in the product name, description or number.

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Shopping > Catalog Search > Search within Supplier

If you want to search for products within a known supplier, you can perform a global supplier search.

Select '**Supplier**' from the drop down menu

Type the name (or parts there of), in this case 'McBride' and hit go.

Shopping > Catalog Search > Search within Supplier

The result will be a list of Suppliers that match your search criteria

Click on the View Products link.

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Hilton
Supply Management

Shopping > Catalog Search > Search within Supplier

The result will be a list of all products of the specified supplier

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Shopping > Catalog Search > Selecting Products

The end result of any search will be a list of products to select from.

Item #: Supplier defined product Code

Product Name: The Supplier is displayed below the name

Mfr: Name of the Manufacturer

Pack/Size: # of items per case and their size

UOM: Unit of MeasureThe UOM is the base UOM.The item may be priced in multiple UOMs. You can change the UOM in Cart or Order Guide.

Min Qty: Minimum order quantity

Order Qty: type in Order quantity. **Price:** Price per unit. The price per unit is the base price. It doesn't reflect any quantity breaks. You can see the adjusted price in the Cart or Order Guide. However it will be calculated if you go directly to REQ or PO.

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Shopping > Catalog Search > Selecting Products

Select: Select single products by checking the box within the line item or select all by checking the box in the column header.

Use the action buttons (explained later) to determine what you want to do with the selected products.
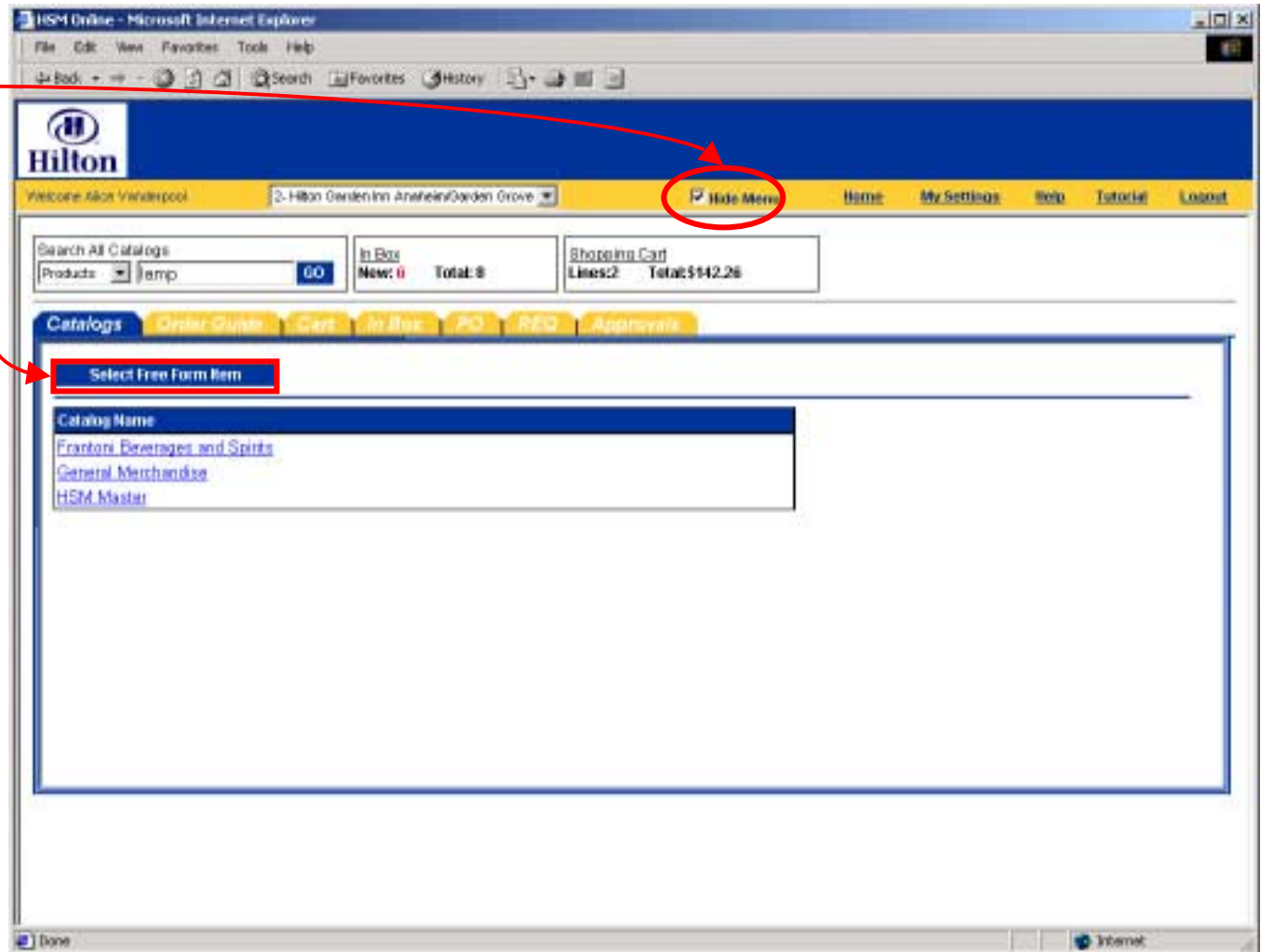
Click here to go back to the Shopping Tutorial

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Shopping > Catalog Search > Creating Non-Catalog Items

Click on the '<u>Home</u>' link

Click the Select Free Form Item button

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Shopping > Catalog Search > Creating Non-Catalog Items

Using this free form screen, you can create items that are not in any of the supplier catalogs. They can then be added to PO's and REQ's just like any other product.

Start by clicking the Select a Supplier button

A supplier search window will pop up. Type the name (or part of it) of the supplier you want to add a non-catalog item for in the search field and hit go

Click the Select button to go ahead with the supplier

Shopping > Catalog Search > Creating Non-Catalog Items

Using this free form screen, you can create items that are not in any of the supplier catalogs. They can then be added to PO's and REQ's just like any other product.

The name of the selected supplier will be shown here

Fill in basic information about the item.

Click the More button for a pop up window that let's you specify additional detail about the product.

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Shopping > Catalog Search > Creating Non-Catalog Items

Decide what you want to do with the newly created item and click the corresponding action button.

Activate the Check box if in order to process the item

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Shopping > Catalog Search > Adding Suppliers On-the-Fly

Decide what you want to do with the newly created item and click the corresponding action button.

Activate the Check box in order to process the item

Under Construction