Cool Things in Graphical

eCommerce Industries, Inc.

ddms distribution software

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Contents

Introduction

This handout covers some of the new and cool features in Ensite Pro Accounts Receivable, Accounts Payable, and Order Entry. All of the features described in this handout are included in the Ensite Pro online help. Some of these features also have complete handouts. All of the handouts are available on our web site at www.ddms.com/support/doc/ver8doc.htm

Accounts Receivable

In this section, we'll discuss disputed invoices, groups, quick pay, query, and deposits.

Disputed Invoices

A new feature lets you mark invoices that have been disputed. This allows your A/R clerk to be aware of any invoices that are being disputed before ever making a collection call.

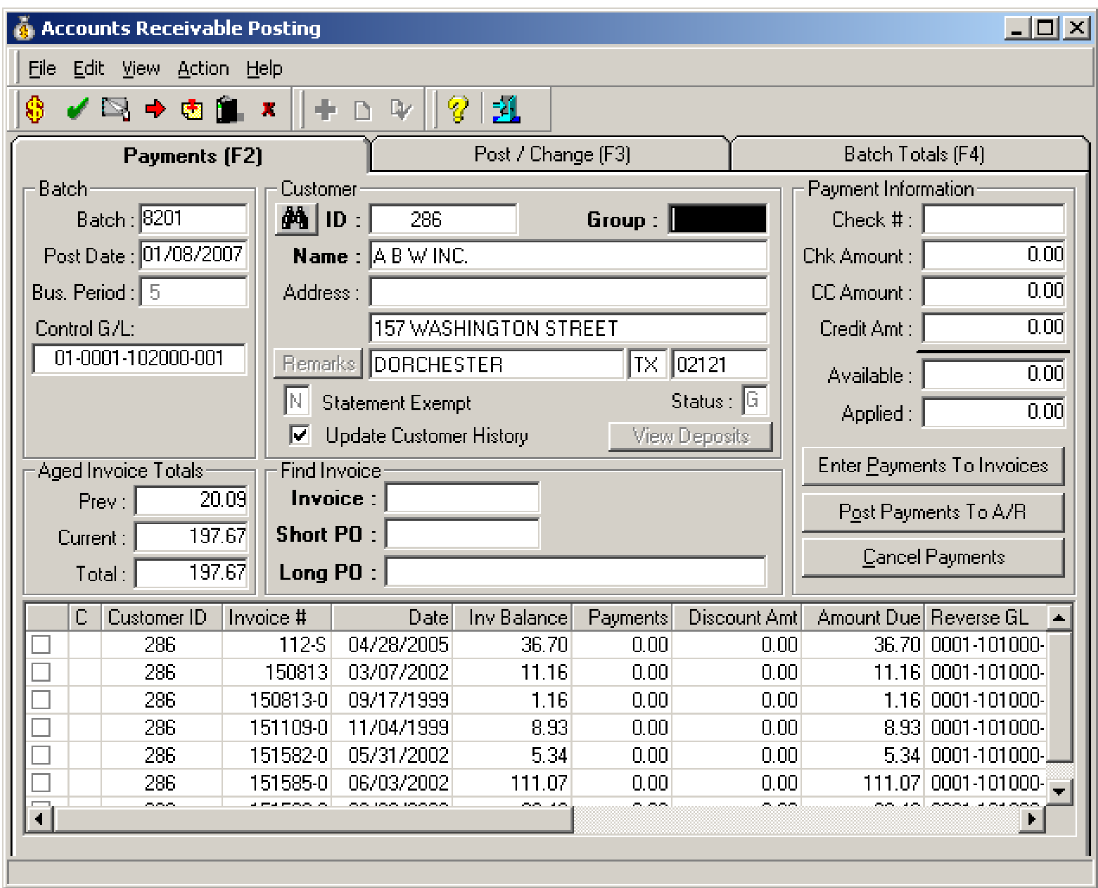


Figure 1: The Group Box in the Accounts Receivable Payments Tab

Pay by Groups

Use the new Group box in the Accounts Receivable Payments Tab to retrieve the customer using the customer's group code. This box allows you to retrieve customers assigned to a specific group. See Figure 1. If you retrieve using this method, you can post payments to customers with a specific group code.

Enter the group code in the Group box and press Enter. The system displays the group code that most closely matches the one you specified. This information comes from the Group box in the Customer Master tab.

Note: This feature is not included in all software packages and may require authorization. For more information, contact ECI^2 sales.

Quick Pay Posting

Quick pay posting is the Ensite Pro equivalent of the text-based Multiple Accounts Per Check method in the (BQ) Accounts Receivable Check Posting screen. You can apply a payment to multiple accounts at once, applying a particular check amount to more than one account.

When you post payments, Quick Pay posts the check number, date, and last payment information to all accounts. The program also updates the 90 $, 60 $, and 30 $ boxes in the Customer Credit tab for every account for which you paid invoices. In addition, the Check # field in the C-AUX file is updated for all posted accounts.

1 Double-click 

. The Accounts Receivable Posting window opens, displaying the Payments tab.

2 Click  or type **Ctrl + Y**. You can also click the Action menu and select Pay Multiple Accounts.

3 The Batch Information dialog box opens. You can use this dialog box to specify the batch number, the control general ledger account number, and the posting date for this transaction. Click each box and enter the information.

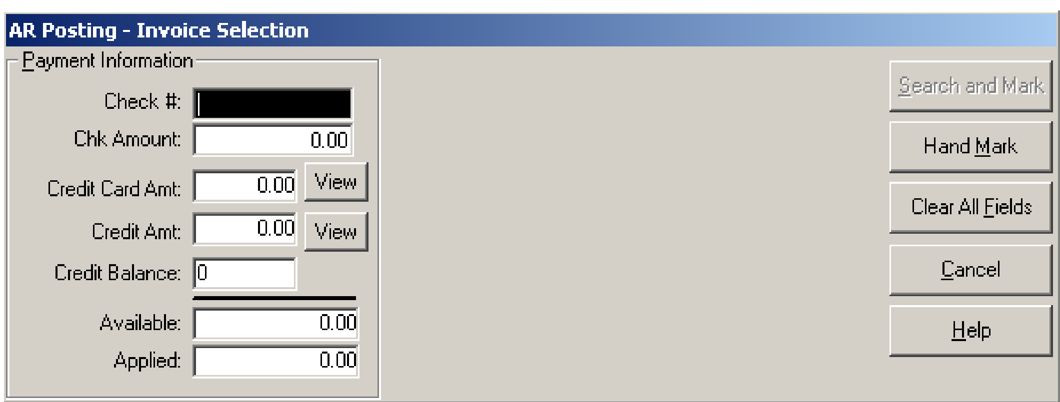
4 After you finish, click OK.

5 The A/R Posting Invoice Selection dialog box opens, as shown in Figure 2. The cursor moves to the Check # box. At this point, you must specify the customer's payment information.

- **Paying by Cash or Check:** In the Check # box, enter the customer’s check number, or the word CASH for cash transactions. You can enter up to eight characters. The check number is reported to the check register. Enter the amount of the cash or check payment in the Check Amt box. When you enter the amount, include the decimal. You can specify up to seven digits before the decimal and two digits after the decimal. Unless the payment amount is an even dollar amount, you must include the decimal point. For example, if the check is for $250.34, and you enter 25034, the account is credited $25,304. However, if the check is for $250.00, you can enter 250.
- **Paying by Credit Card:** To post a credit card payment, click View. The Credit Card Number though Pay Balance boxes display. Click each box and enter the credit card information for this posting.
- **Paying by Credit Memo:** To specify a credit memo, click View. The Credit Invoice Selection boxes open at the bottom of the tab. Check the box corresponding to the credit invoices to apply to this posting session or click Select All to select all the available credit invoices. As you mark credit invoices, the amount in the Credit Amt box increases. To deselect all the credit invoices you have marked, click Clear All.

6 When you finish, click Hand Mark.

Figure 2: The A/R Posting Invoice Selection Dialog Box



7 At the Update Customer History with Check prompt:

- To update the Last Payment, Of $, and On Check # boxes in the Customer History window, click Yes.
- To leave these boxes as they are, click No.

8 In the Payments tab, and the cursor moves to the Invoice box. Specify the invoice number, including the extension number to which to apply the payment, and press Enter. If you enter an invalid invoice number, the cursor returns to the Invoice box. You can also specify a credit invoice number ito apply a credit amount to this invoice.

9 When you specify a valid invoice number, the invoice information displays at the bottom of the tab, along with the Pay Invoice # XXXXX prompt.

To pay the displayed invoice, click Yes. Click No to return to the Invoice box and specify a different invoice number.

- If the amount is sufficient to pay the invoices, the amount in the Available box decreases and the amount in the Applied box increases by the amount applied.
- If the amount is not sufficient to pay the invoices, the Partial Payment dialog box opens, listing the invoice number that was partially paid, along with the amount that was applied. Click OK. At this point, the Amount Due box is updated with the remaining amount of the invoice that could not be paid.

10 The cursor returns to the Invoice # box so you can continue to enter invoice numbers to pay.

11 When you finish, click Post Payments to A/R.

- If the available amount matches the total outstanding invoices due, the Post to Account prompt displays, along with the Are You Sure message. Click Yes.
- If the amount remaining is greater than the invoices you selected to pay, the You Have Not Applied All of the Available Funds, Do You Still Want to Post prompt appears. Click Yes to specify another invoice number.
- If you're posting a cash or check payment, the payments are posted, and the Complete message opens. If you're posting a credit card payment, the Approve message appears. This message lets you specify whether to have the customer's credit card approved before posting the payments. If you specify to approve the card, you must enter the approval code before posting payments. If you specify not to approve the card, the payments are automatically posted. When the Complete message opens, click OK.

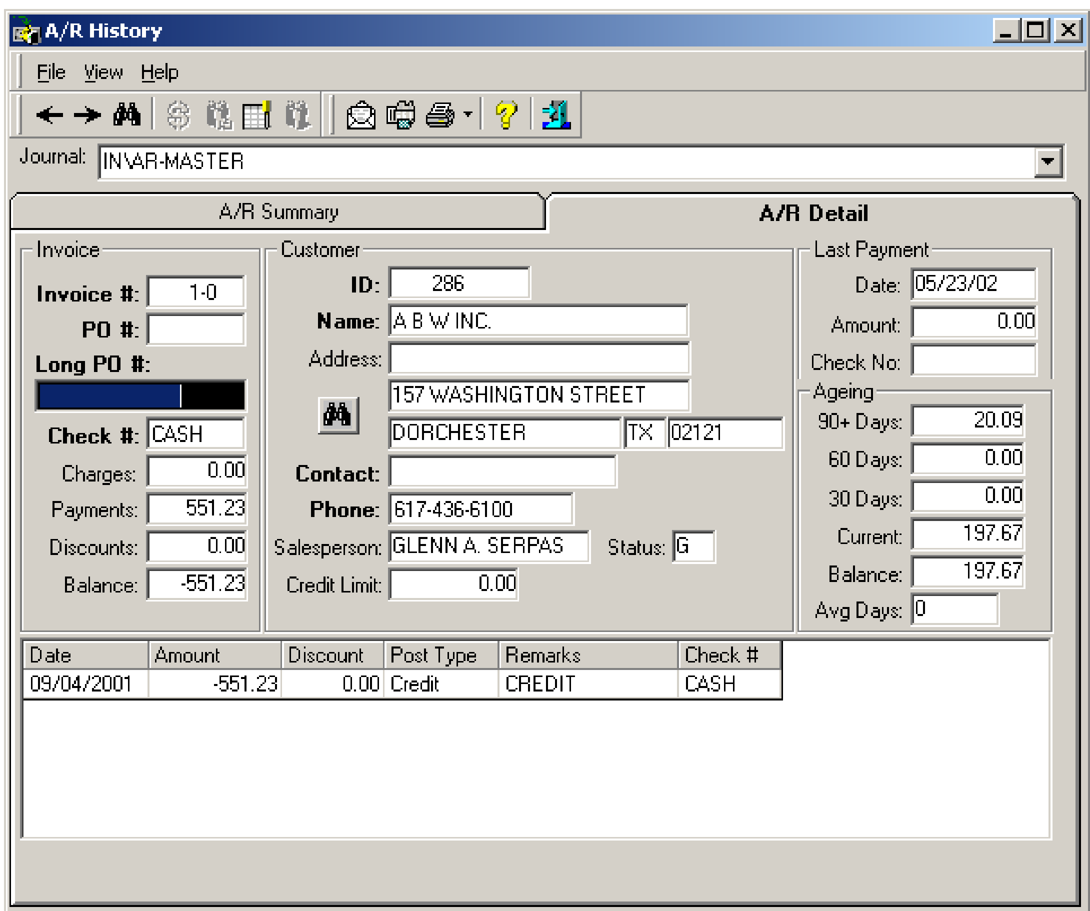
Note:	If you have posted credit card payments for this customer in the past and have entered the approval code, you can click On File to use the approval code previously entered. In addition, if the Prompt for Address Verification on Credit Card Payments field in the (LA2) A/R Parameters screen is set to Y, you are prompted to enter the customer's address.

12 At the Complete message, click OK. The customer's balance is updated, if you so specified. The AR-BATCH and AR-MASTER files are also updated. In addition, the aged totals in the Aged Invoice Totals section of the Payments tab are updated.

A/R Query

The A/R History Invoice Query dialog box lets you locate and select an invoice from a list of invoices. You can search by the following: invoice number, purchase order number, check number, date, payments, and charges.

Figure 3: The Long PO # Box in A/R History Detail Tab



In the A/R History Detail Tab, you can use the Long PO # box to select the invoice to view. See Figure 3. Enter the long purchase order number in the Long PO # box, and press Enter. You can enter up to 30 characters in this box. The invoice that most closely matches the one you specified appears.

You can also use the Long PO # box to retrieve variations of long purchase order numbers. To do so, combine part of the purchase order number with an asterisk (*). The asterisk serves as a wildcard; it represents any character. (The wildcard feature works with short P/O numbers, as well.) Suppose you enter *123 as the purchase order number. The system would display all P/Os ending in 123 — 4123, 56123, a123. Or suppose you specify 123*. The system would include all purchase orders numbers beginning with 123 — 123456, 1239, 123a. Likewise, if you specify *123*, the numbers could appear anywhere in the sequence — 123456, 4123, 51234, a123, and so forth. The system searches for the P/O in the journal set in the Journal box, JNL-AR, for example.

Accounts Receivable Deposits

When you receive a deposit from a customer, you can post it in the A/R Deposits dialog box. The deposit posts as a liability because it is security for the customer's entire order and reduces the customer's A/R. The deposit becomes an asset when you invoice the ticket.

If you also use Auto Apply when posting the deposit, it is automatically applied as a payment to the ticket once it is invoiced.

Understanding How Deposits Affect General Ledger

The following is an example of how deposits are posted to G/L when entered, applied to the invoice, voided or forfeited. When voiding a deposit, it is assumed the credit is returned to the customer, either as cash or a credit to the customer's account. Therefore, when you void a deposit, the amount is credited to the customer's account and you must adjust it accordingly. If the deposit is forfeited, it is assumed the money is not returned to the customer. It is placed in a Forfeit Deposits account listed in the (L21) Additional G/L Master Numbers screen for accounting purposes.

Note: The Cash and A/R accounts are in the (L2) screen. The Customer Deposits and Forfeit Deposits accounts are in the (L21) screen. You must set up these accounts in the Chart of Accounts and in the parameter screens before you can enter deposit amounts.

When you enter a deposit:

Debit = Cash Account

Credit = Customer Deposits Account (L21)

When the deposit is applied:

Debit = Customer Deposit Account

Credit = Accounts Receivable Account (The amount is applied to the invoice, leaving a balance due on the customer's account.)

Note: If you use Auto Apply, deposits are automatically applied when the ticket is billed.

If the deposit is voided and a credit or cash is returned to the customer:

Debit = Customer Deposits

Credit = Accounts Receivable Account

A ticket is added to the customer's account with the invoice number specified in the A/R Deposit Void dialog box. (The default is 2-0.) The dealer must adjust it from A/R, depending on if the customer is receiving any money back.

If the deposit is forfeited, the customer does not receive the money back:

Debit = Customer Deposits Account

Credit = Forfeit Deposits Account (L21)

Creating a Deposit

1 Double-click 

.

2 Click the Action menu and click  or type **Ctrl + D**.

3 The A/R Deposits dialog box opens, and the cursor moves to the Apply To box. See Figure 4. Click the down arrow in this box to specify whether to apply this deposit amount to a project or to a specific invoice.

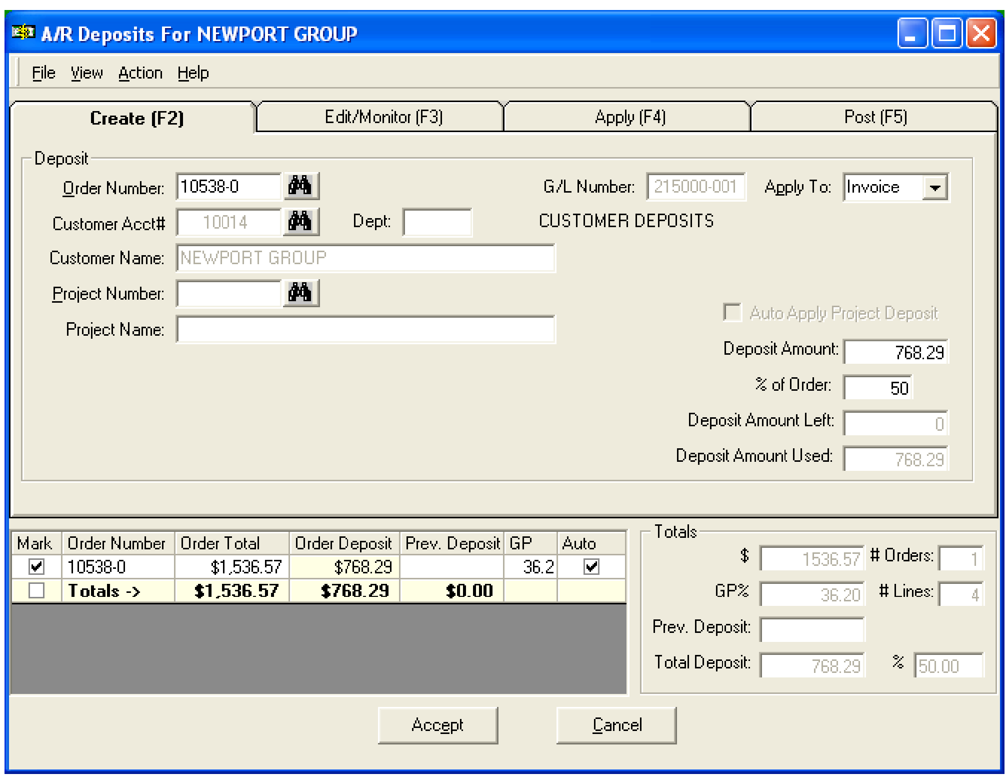
- If you select Project, the cursor moves to the Project Number box. If you know the project number, enter it in this box. If you know the project name, click the Project Name box and enter the name. If you don't remember the name or number, click  to open the Project Query dialog box. Scroll through the list to find the correct customer. Click it, and click OK.

- If you select Invoice, the cursor moves to the Order Number box. If you know the order number, enter it in this box. If you know the customer's account number or name, click the Customer Acct # or Customer Name box and enter the account number or name. If you don't remember the name or number, click to open the Order Browse or Customer Query dialog box. Scroll through the list until the one you need appears. Click it, and click OK.

4 When the cursor moves to the Deposit Amount box, you can enter the amount or you can enter a percentage of the invoice or project the customer is depositing.

- To enter an amount, in the Deposit Amount box, enter it, including the decimal. Press Enter to accept the deposit amount.
- To enter a percentage, click the % of Order box, and enter the percentage to post as a deposit. For example, if the customer is making a 10% deposit, enter 10. Press Enter to accept the deposit percentage.

Figure 4: Creating a Deposit in Accounts Receivable



5 At the bottom of the dialog box, the Auto box corresponding to the invoice is checked. To automatically apply the deposit as a payment to the ticket when it is invoiced, leave the Auto box checked.

6 To view more information about this order in the O/E History window, right-click an invoice and click Display Order History. When you finish viewing order entry history, close the O/E History window.

7 When you finish specifying deposit information, click Accept.

8 In the Check # box in the Post tab, specify how the customer is paying for the deposit.

- If the customer is paying by check, click Pay By Check. In the Check # box, enter the check number.
- If the customer is paying by credit card, click Pay By Credit Card. In the CC # box, enter the credit card number, along with the expiration date, and credit card type in the Exp Date and CC Type boxes. The Address Verification boxes default to the address for the displayed customer. You can change the address, if necessary.
- In the Print Options section of the tab, you can print the deposit receipt. The Format and Printer boxes display the default format and printer. This information comes from the (LA5) screen.

9 When you finish entering information for this deposit, click Post.

10 The Updating Deposits message appears.

- If the customer is paying by cash, go to **Step 11**.
- If the customer is paying by credit card, the Approve message appears. Click Yes to approve the customer's credit card, or click No if you are not approving the card. If you specify to approve the card, the Credit Card Approval Code dialog box opens. Enter the approval code and click OK. If the customer's approval code is on file, you can click On File to select the code.

11 The deposit is posted and the G/L asset account you set up in the Chart of Accounts Master window is updated.

Viewing A/R Deposits

1 Double-click 

.

2 Click the Action menu and click  or type **Ctrl + D**.

3 Click the Edit/Monitor tab or press F3.

4 The Edit/Monitor tab displays all the deposits you have created, as shown in Figure 5. To search by customer number or name, click the Customer column.

5 You can right-click to reprint the deposit slip, reprint the customer's order, print all deposits for the displayed customer, or reprint all deposits for all customers.

Applying Deposits

You use this tab to apply the deposits you have created. Instead of automatically applying the deposits, you can apply them separately. For example, if a customer makes two separate deposits, you can use this tab to apply one deposit now and the other one later.

1 Double-click 

.

2 Click the Action menu and click  or type **Ctrl + D**.

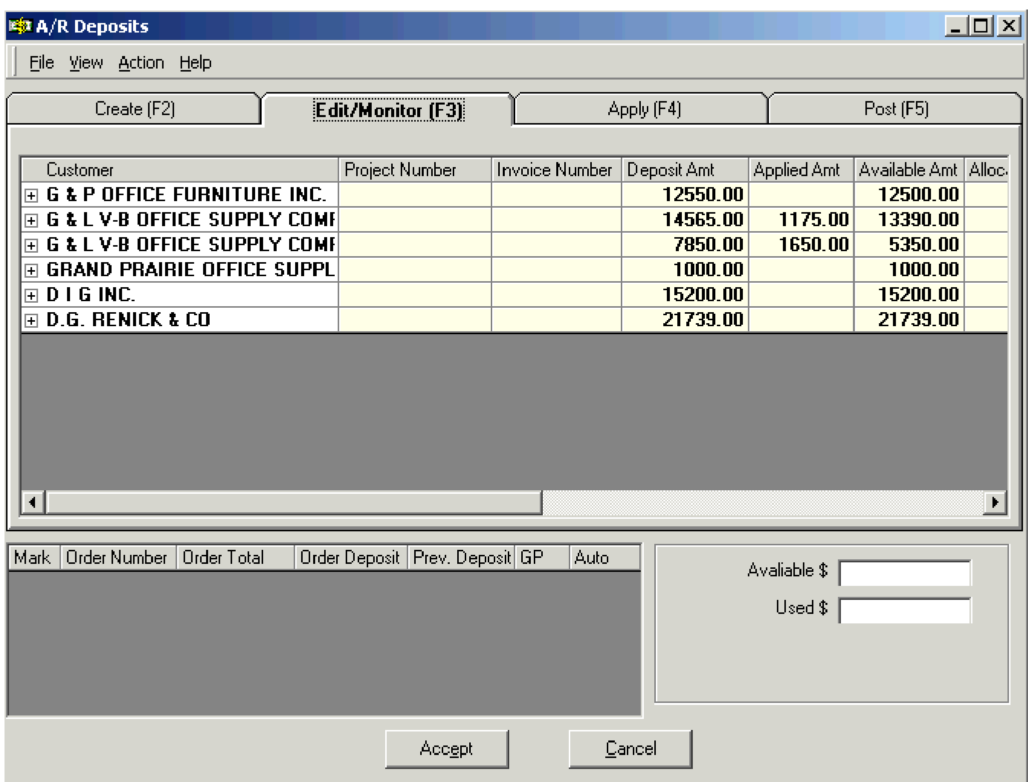


Figure 15: Editing Existing Deposits in Accounts Receivable

3. Click the Apply tab or press F4.
4. The Apply tab displays all the deposits you have created. To apply a displayed deposit, click the customer's name and mark the deposit to apply.
5. When you're ready to apply the deposit, click Accept. The Applying Deposits message appears.

Prorating A/R Deposits

You can now prorate A/R deposits. Previously when you invoiced the ticket, the system applied the entire deposit amount against the ticket, regardless of the amount billed. Prorating A/R deposits lets you apply a percentage of the deposit amount as a payment against the ticket when it is partially invoiced, rather than the entire deposit amount. The system does this by using a prorated percentage equal to the invoiced amount versus the total amount. For example, if you invoice the ticket only once for 100%, the entire 100% of the paid deposit is applied to the invoice. But if you invoice 50% of the items on the order, the applied deposit is 50% of the initial deposit received. The balance of the deposit is not applied until the remainder of the order is invoiced.

Suppose you create a ticket containing ten items selling for $100 each. The ticket amount is $1000. You post a deposit of $500 to the -0 ticket. You invoice the customer for four of those ten items, totaling 40% of the items on the ticket. The system calculates the amount of the deposit posted to the -0 ticket as follows:

40% of $500 = $200 to be applied to the -0 invoice. The resulting 60% of $500 = $300. The $300 remains in the liability account attached to the base ticket and is applied to ascending tickets, -1, -2, -3, and so on.

If you use this feature, the A/R Deposits dialog box has been enhanced to display the original deposit, the amount applied to each ticket, as well as the remaining amount to be applied. When you print the invoice, the system shows only the deposit amount that was applied, not the entire deposit amount. If you print a Pro Forma invoice, the system prints the total deposit available at the time the Pro Forma is printed. The Deposit Report has also been modified to sort by customer and then order number. This lets you easily see the original -0 ticket information, along with the -1 or -2 tickets that were created.

To use the prorating A/R Deposit feature, you must set the Prorate Deposit Amount Across Dash Numbers field in the (LA5) screen to Y. If you set this field to Y, the system immediately begins prorating invoices when the deposits are invoiced. If you leave this field blank or set it to N, the system continues to apply the full deposit amount when the ticket is invoiced.

Note: When you apply deposits to projects, the project is not affected by this feature, with one exception. If you allocate tickets under the project, the allocated tickets go through the prorated deposit process.

Accounts Payable

In this section, we'll discuss posting payables to purchase orders and multiple vendors.

Posting P/Os

Once purchase order information is in JOUR-PO or an archived journal, you can post accounts payable invoices through the Accounts Payable Posting Post P/O tab. The JOUR-PO file lets you cross reference the purchase order information while you are posting accounts payable invoices. This is an important feature, especially, if you do not receive a complete shipment from a vendor. The Post P/O tab lets you select the items on the purchase order to include in the accounts payable invoice.

When you receive a shipment from a vendor, the shipment is compared to your purchase order and the vendor's invoice. If the vendor does not ship all the items listed on the purchase order, post only the items you receive. The Post P/O tab lets you limit the items by acknowledgment number and receiving date when you post the payment.

Through the Post P/O tab, you can also:

- Change a department total.
- Post freight costs to location 01 and multiple locations.
- Change the cost on an item.
- Split invoice costs among departments.

Note: Because the Post P/O tab matches purchase orders to the vendor's invoice, you must purge and archive your completed purchase orders to the JOUR-PO file or other archived journal to use this screen.

Understanding the Relationship Between Purchasing and A/P

Because the Accounts Payable Posting Post P/O tab lets you match purchase orders created in the Purchase Order Entry window to the vendor's invoice, it is important to understand the relationship between the Purchase Order Entry and Accounts Payable applications.

When ordering items from a vendor, you complete a purchase order through the Purchase Order Entry window. Once you create a purchase order, it is stored in the PO-MASTER file.

When you receive the shipment from the vendor, the shipment usually includes an invoice or acknowledgment number. Use the Receive action code in the Purchase Order Entry window to indicate the vendor invoice number or acknowledgment number, and which items were received.

Before using the Post P/O tab, you must purge completed purchase orders. If a purchase order is not complete, only the received items are purged. You purge completed purchase orders through the (S) Purchase Order Selectors or (SR) Purchase Order Reports screens. After you purge, the purchase orders are archived. The default archive file is JOUR-PO.

After you purge, the purchase orders or the individual lines on the purchase orders are no longer in the PO-MASTER file.

To verify that the purchase orders have been purged, you can view them using the [R] Inquire or Report on Archive function in the (SR) screen. If the purchase order does not appear in the (SRR) Purchase Order Archive screen, reindex JOUR-PO after the purchase orders have been purged. You can also verify that the purchase orders have been purged by using the P/O History window.

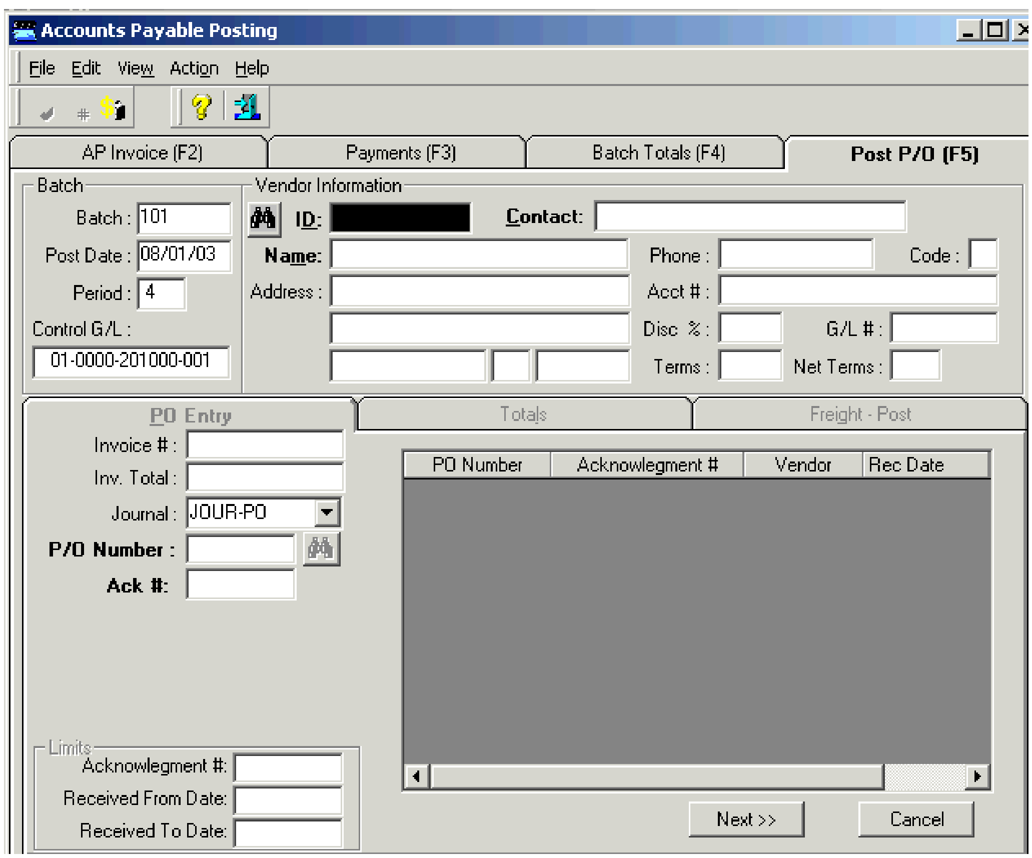


Figure 6: The Accounts Payable Posting Post P/O Tab

Once your P/Os are correctly purged, you can post accounts payable invoices in the Post P/O tab. The JOUR-PO file lets you cross reference the purchase order information while you are posting accounts payable invoices. This is an important feature, especially if you do not receive a complete shipment from a vendor. The Post P/O tab lets you select the items on the purchase order to include in the accounts payable invoice.

1 Double-click 

. The Accounts Payable Posting window opens, displaying the Invoice tab.

2 Click the Accounts Payable Posting Post P/O tab. The cursor moves to the ID box. See Figure 6.

3 Select the vendor for whom you are creating an invoice. You can use the ID and Name boxes.

4 After you select a vendor, the Accounts Payable Batch Information dialog box opens. Specify the batch information for this transaction. Click OK.

5 In the Invoice # box, enter the invoice number to create with the purchasing information and press Enter.

6 In the Inv Total box, you can enter the total amount for this invoice and press Tab. If you enter an invoice total, the amount you specify must match the total invoice amount.

7 In the Journal box, click the down arrow to select the name of the file to post from, or press Tab to accept the default, JOUR-PO.

8 At this point, you must select the purchase orders to include on this invoice. You can do so using the purchase order number or the acknowledgment number.

- If you know the number, enter it in the appropriate box and press Enter.
- If you don't know the purchase order number, click . In the browse dialog box, highlight the purchase order and click OK.

9 The system displays information for the purchase order you specified on the right-hand side of the tab. You can continue to select up to 12 purchase orders numbers per invoice.

10 After you have verified the vendors and corresponding purchase order numbers, you can limit the items to include by acknowledgment number in the Ack # box.

11 Click Next. The system begins totaling the invoice and displays the invoice totals by item department. The amount of each item department appears in the Dept Total box corresponding to the department number or letter. The Subtotal box displays the subtotal of all the items on the invoice.

- To view information for an item, click an item department to highlight it, and click Item Detail. At this point, you can change the cost for the line item(s). Click the Cost box and enter the new cost over the existing cost. At the Update Changes message, click Yes. To update the cost in the sales journal, click the corresponding Update S Journals check box. If the item is not found in the JOUR-S or P-MASTER files, the system prompts you to search for the file in the (LGA) Sales Journals Parameters screen. To return to the Post P/O Totals tab, click Exit.
- To exclude departments with zero amount, click the Exclude Zero Amounts box.
- To change department information, click the department number corresponding to the amount to change. For example, if the amount to change is in Dept 6, click Dept 6. Enter the correct amount for this department. The system recalculates the subtotal and total amounts.

12 When you finish changing and viewing department totals, click Next.

13 The Freight - Post tab opens and the cursor moves to the Loc box. Enter the location number for this invoice. Press Tab.

14 In the Additional Charges box, enter any additional charges to add to this invoice. For example, to add a freight charge, enter the amount of the freight charge, including the decimal point, and press Tab.

15 In the G/L # box, enter the General Ledger account number to charge the freight cost to and press Tab. If you don't know the account number, click the down arrow in the G/L # box to select from a list.

16 In the Remarks box, enter any remarks for this additional charge.

17 At this point, you can change the information for this invoice. To do so, click the Sub Total through Remarks boxes and enter the new information over the existing information.

18 When you are ready to post the purchase order information to accounts payable, click Post Invoice.

Multiple Vendors

Using the A/P Multiple Vendors feature, you mark and pay multiple invoices for multiple vendors while issuing only a single check to a buying group for the total of the purchases. You must set up the Vendor window for each vendor that uses this feature. Invoices you create for any vendor that has a Remit ID are stored with the Remit ID in the A/P invoice record. This affects invoices that you create using the AP Invoice tab in the Accounts Payable Posting window as well as invoices you create using the A/P Post P/O tab. However, you have the option of clearing the Remit ID code on each posting. Leaving the code blank indicates to handle the posting using the existing A/P flow and is not paid or reported as part of a vendor group. As with all accounts payable postings, the new Remit ID code is written to the AP-MASTER, AP-BATCH, and GLD-MASTER files. This new feature applies when creating hand checks or when creating system-generated checks.

Order Entry

In this section, we'll discuss viewing item history, changing orders, print groups, and the catalog explorer.

Viewing Order Entry History

In Order Entry, you can view manufacturer information to see which items this customer has purchased in the past.

1. In Order Entry, go to the Item Detail tab.
2. Press F10 to view item history.

Note: If no item history is found, refer to the heading **Building Item Usage**.

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3. A dialog box opens listing the customer's account number, and the cursor moves to the Company box. You can enter the manufacturer's code or the item description.

   To specify a manufacturer's code, you must entire the entire code. Click Find.

   To specify an item description, click the cursor in the Description box and enter part or all of the item description. Click Find. For example, if you enter NOTE, all notebooks and notes sold to this customer display.
4. The item number, company, description, order date, order quantity, and selling price for the times this item was sold to this customer displays. When you finish viewing manufacturer history, close the windows.

Building Item Usage

The following steps *must* be performed on your Ensite Pro server. To keep accurate item history, you must periodically build the P-USAGE file. ECI² recommends that you build your item usage file monthly.

1 Double-click .

2 When the Utilities menu opens, click Build Item Usage.

3 In the Build Customer Item Usage window, enter the location for which you are building item information. For example, to build item usage for location 2, type 2.

4 Click OK.

5 Leave the ASP ID box blank.

6 Click OK.

7 As the item usage is built, the system displays information in the action, file, and progress boxes. When the procedure is complete, the Successfully Build Item Usage File message appears. Click OK.

Order Changes

Our graphical software lets you easily change almost any component of an order, including things that are impossible to change in text-based. For example, suppose you are ready to end the order and realize you retrieved the wrong departmental account. With graphical, you simply retrieve the correct department record, then continue with the order. You can change line items by double-clicking or by highlighting the item and pressing Enter. You can also scroll up or down by clicking the up or down arrow keys to access a line. Once the item is highlighted, press Enter to change the item.

Requiring a Salesperson on Every Order

When placing an order in Order Entry, customers must have a salesperson assigned. If no salesperson has been assigned to the customer, the Must Select a Salesperson for This Order dialog box opens. Click OK and select the salesperson for the customer. Then you can continue with the order.

Using Print Groups in Order Entry

You can use the Print Groups option to group and arrange line items on an order. You can specify a group name and indicate which items added to the order are assigned a specific group name. The Print Groups function is available when using all order entry types, including Commercial Order Entry, Furniture Order Entry, and Serialized Order Entry and can be used in Order, Change, and Verify modes.

For example, you could create a print group named Accounting Department and group five items on the order under this heading. You could then create another print group named Training Department and group three items under this heading. You can create as many print groups and assign as many items to the group as necessary. Once you print the ticket, the system displays the items within the group you specified. This can be helpful when delivering items or when invoicing items on the ticket.

In the O/E History window, items on the ticket appear in the sequence in which they were added to the order. They do not appear in print group order.

If you use your own custom Report Writer format to print the ticket or invoice, you must create a print group format . The Item Print Order on the first line of the format must be set to G for Print Groups.

Also, the format must have a line 91 for the special text written in the print group headers.

Catalog Explorer

The Catalog Explorer lets you select an item from the contents of various wholesaler catalogs including S.P. Richards, United Stationers, and Tech Data. You can use the Catalog Explorer to select an item in the Order Entry Item Detail tab, in the Item window (through the Item Query dialog box), and in the Purchase Order Entry Item Detail tab. Catalog Explorer lets you find an item without knowing the item number. You can view wholesaler catalogs by different levels: multi-level, single-level, and page or vendor.

Using Catalog Explorer in Order Entry

You can use Catalog Explorer to select the item to place on an order.

1. Go to Order Entry and begin entering the order as you normally would.
2. Click the Item Detail tab.
3. To open Catalog Explorer, click .
4. When the Catalog Explorer dialog box opens, click the catalog to view in the Which Catalog box. You can choose from the following catalogs: S.P. Richards, United, or Tech Data.

5 In the Category box, select the method by which to view the information in the catalog. You can choose from the following view options: Multi-Level, Single-Level, Page, and Vendor. (If a category is not available for the catalog you chose, the option is gray.)

6 After you choose your view option, click the item category on the left side of the dialog box. The available items appear on the right side of the dialog box so you can place an item on the order.

Note: If you use Multi-Level, only the lowest level in the box on the left generates a display in the box on the right.

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7 To select an item, double-click it or highlight the item and click Select.

Note: To exit from the Catalog Explorer dialog box without selecting an item, click Cancel.

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8 The cursor returns to the Item Detail tab and displays the item you entered. Continue entering the order as you normally would.

Using Catalog Explorer in the Item Database

You can also use Catalog Explorer in the Item database.

1 In the Item database, click  to search for an item.

2 In the Item Query dialog box, click Catalog Search. The Catalog Explorer dialog box opens.

3 When the Catalog Explorer dialog box opens, click the catalog to view in the Which Catalog box. You can choose from the following catalogs: S.P. Richards, United, or Tech Data.

4 In the Category box, select the method by which to view the information in the catalog. You can choose from the following view options: Multi-Level, Single-Level, Page, and Vendor. (If a category is not available for the catalog you chose, the option is gray.)

5 After you choose your view option, click the item category on the left side of the dialog box. The available items appear on the right side of the dialog box.

Note: If you use Multi-Level, only the lowest level in the box on the left generates a display in the box on the right.

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6 To select an item, double-click it or highlight the item and click Select.

Note: To exit from the Catalog Explorer dialog box without selecting an item, click Cancel.

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7 The cursor returns to the Item Master tab and displays the item you entered. Continue entering information as you normally would.

Using Catalog Explorer in Purchasing

You can also use Catalog Explorer in Purchase Order Entry.

1 Go to Purchase Order Entry and begin entering the purchase order as you normally would.

2 Click the Item Detail tab.

3 To open Catalog Explorer, click .

4 When the Catalog Explorer dialog box opens, click the catalog to view in the Which Catalog box. You can choose from the following catalogs: S.P. Richards, United, or Tech Data.

5 In the Category box, select the method by which to view the information in the catalog. You can choose from the following view options: Multi-Level, Single-Level, Page, and Vendor. (If a category is not available for the catalog you chose, the option is gray.)

6 After you choose your view option, click the item category on the left side of the dialog box. The available items appear on the right side of the dialog box so you can place an item on the order.

Note: If you use Multi-Level, only the lowest level in the box on the left generates a display in the box on the right.

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7 To select an item, double-click it or highlight the item and click Select.

Note: To exit from the Catalog Explorer dialog box without selecting an item, click Cancel.

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8 The cursor returns to the Item Detail tab and displays the item you entered. Continue entering the purchase order as you normally would.