Chapter 2 – Shopping

Order Guide

*Note: To advance from slide to slide press your **Page Down** key
Or the right button on your mouse*
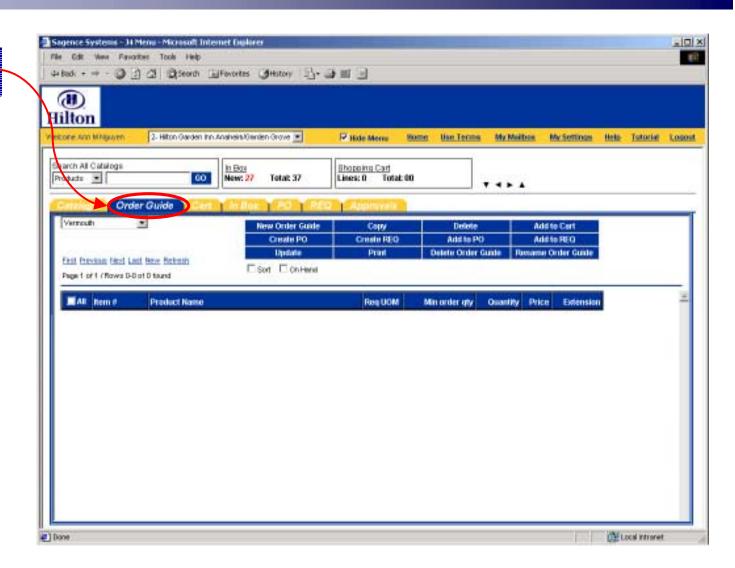
- **The Order Guide Tab**
  - Selecting an Order Guide
  - Browsing an Order Guide
  - Exposing hidden columns
- **Creating New Order Guides**
- **Moving Products to an Order Guide**
- **Purchasing from your Order Guide**
- **Other Functionality**
  - Updating & Printing
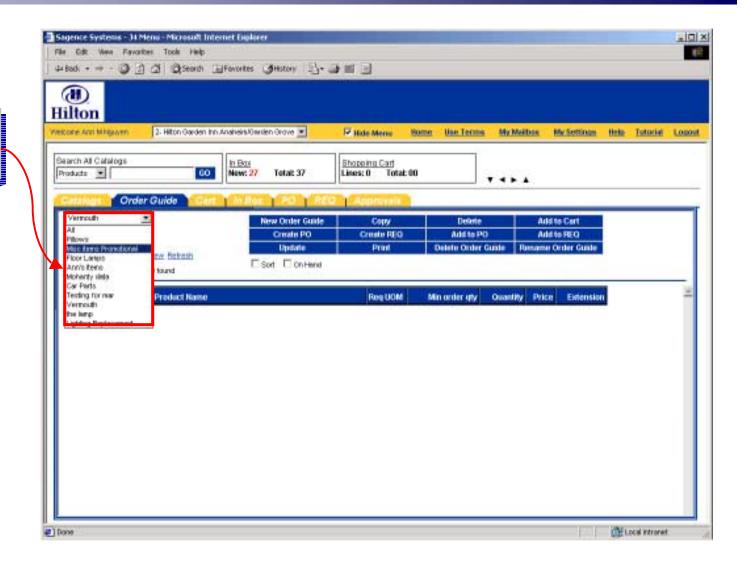 - Copying Items Between Order Guides
  - Renaming and Deleting

Shopping > Order Guide > The Order Guide Tab

Click on the Order Guide tab to get to this screen.

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Shopping > Order Guide > The Order Guide Tab

Select Order Guide
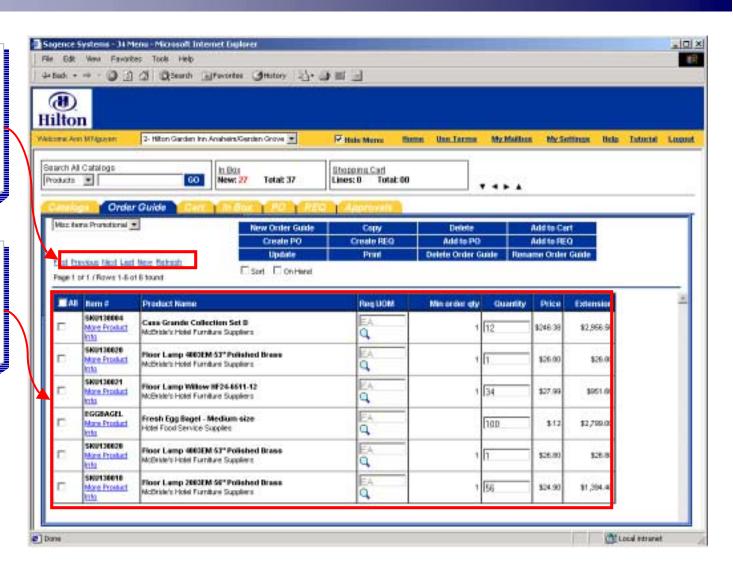Select an Order Guide from the Drop Down List

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Browsing
If the selected Order Guide contains many Products, the system will break it up into several pages, which can be browsed using these commands.

Line Items
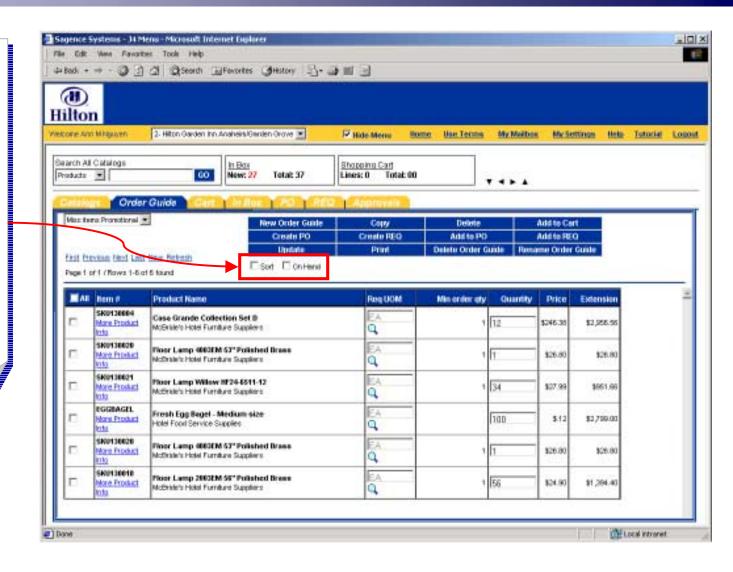This table contains the line items for the corresponding Order Guide (or a subset thereof resulting from a search)

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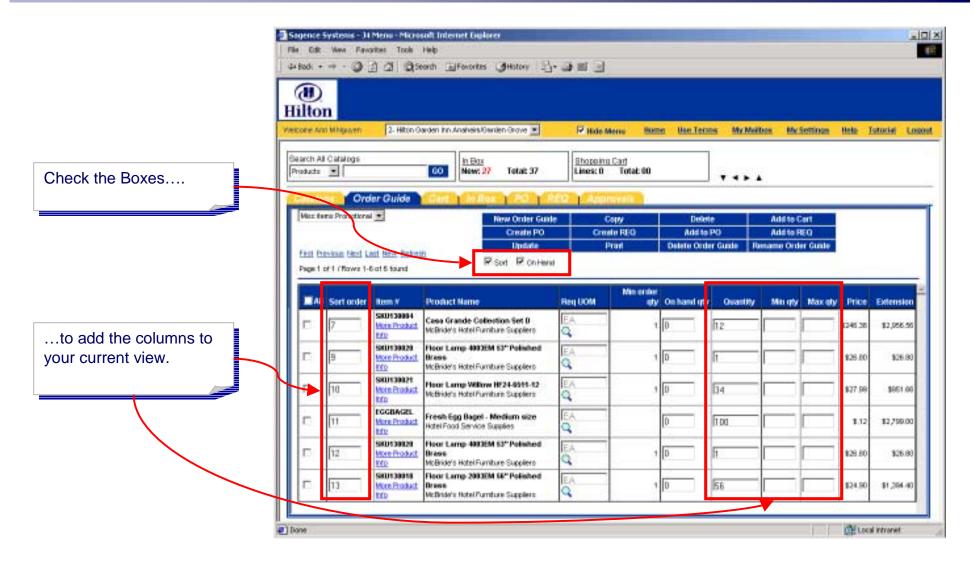
Expose Hidden Columns
Check these boxes to expose hidden columns. **Sort** will show the sort order column and **On Hand** will expose a column where on hand quantities can be recorded (as well as the minimum and maximum quantity memo fields per line item to help determine what quantity needs to be ordered)

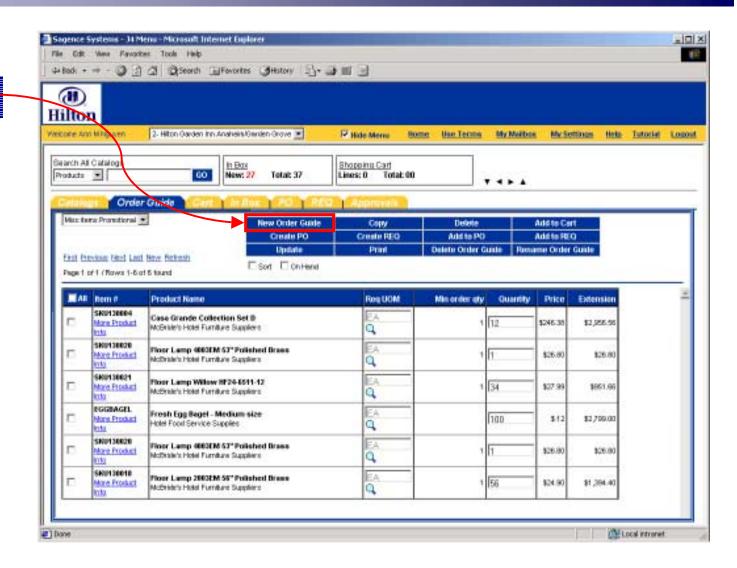# Shopping > Order Guide > The Order Guide Tab

Check the Boxes….

…to add the columns to your current view.

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Shopping > Order Guide > Creating New Order Guides

To Create a New Order Guide, click here.

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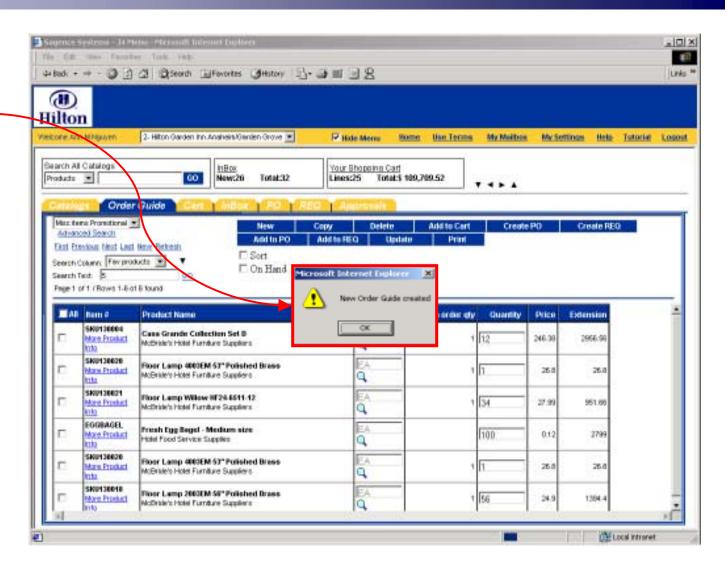
Type the name of the Order Guide here (in the example it is "Lighting Replacement"). Click OK to proceed.

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Shopping > Order Guide > Creating New Order Guides

Click OK to confirm the system message.

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Shopping > Order Guide > Creating New Order Guides

Your new Order Guide has been created and can be found in the drop down list

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Shopping > Order Guide > Moving Products to an Order Guide

You can add products to an Order Guide from the catalog search results.

Click the Catalog Tab

Suppose you want to add two types of Floor Lamps to your Order Guide. Select the models by checking the boxes at the line item level

Type the typical order quantities here.

Click the 'Add to Order Guide' button to copy the items.

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Select the Order Guide you want to add the items to (in our case 'Lighting Replacement') from the list of existing Order Guides

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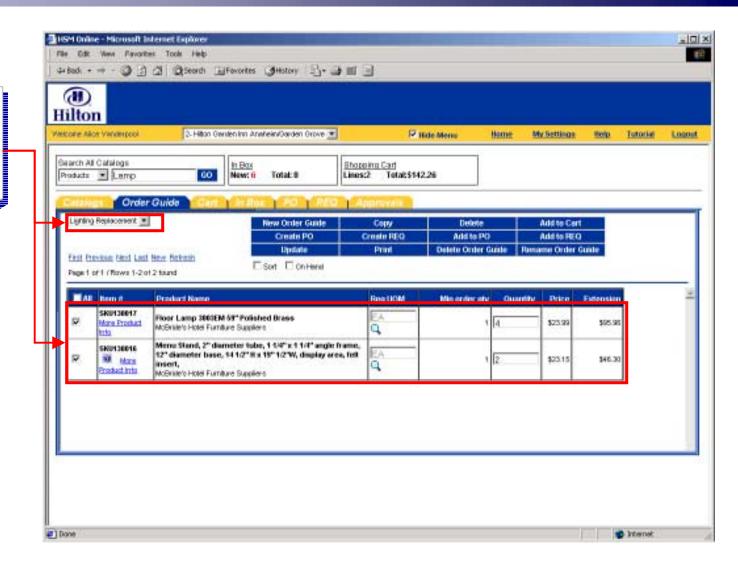
The system will now take you to the selected Order Guide. Below are the two products you have just added.

Shopping > Order Guide > Purchasing from your Order Guide

There are multiple ways to launch the shopping process from your Order Guide

First, check the items you want to purchase

1. Purchase Order
You can either create a new PO or add to an existing one

2. Requisition
You can either create a new REQ or add to an existing one

3. Cart
You can add items to your Shopping Cart and continue from there

Shopping > Order Guide > Other Functionality

Delete
Deletes the selected Items

Copy
Lets you copy the selected item to another order guide

Print
Click here if you need a paper version of your order guide to take inventory for example. The system create an Excel file. (Either open the file from the current location or save it to your computer)

Update
When you make changes to your

Delete/Rename Order Guide