OFFLINE CATALOGUE

(ENTERPRISE & K8 TRADER)

IQ OFFLINE CATALOGUE

The Offline Catalogue will make it possible to have access to stock items that are not part of your original stock items.

Offline Catalogue will allow you to carry a smaller list of stock items to sell. The rest of the stock items you can sell out of the catalogue book as "Specials".
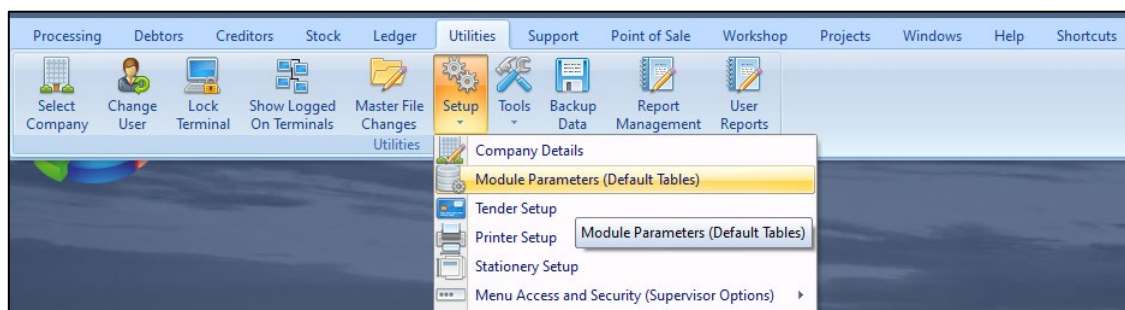
The Offline Catalogues can be uploaded from their suppliers on the same principle as Stock Price Update utility. The system will then allow them to select this product to sell when it is required.

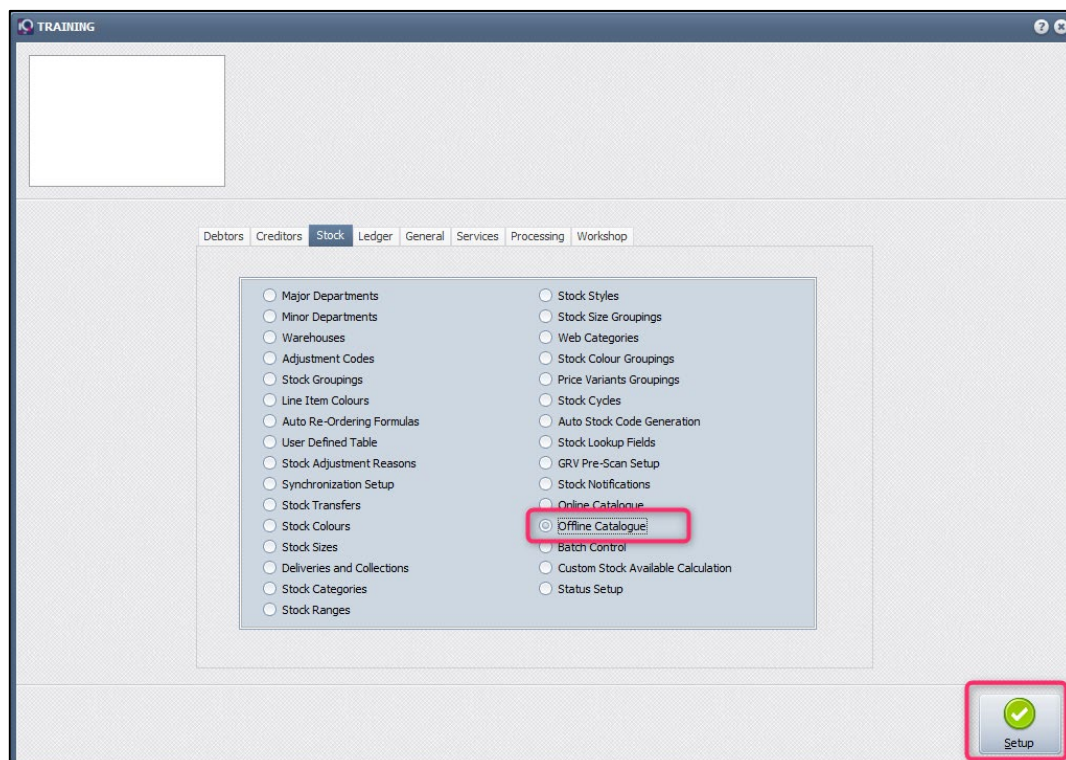Stock items from the Catalogue can be added as stock item or can be used as a buyout item.

IQ Offline Catalogue is only available in IQ Enterprise and K8 Trader.
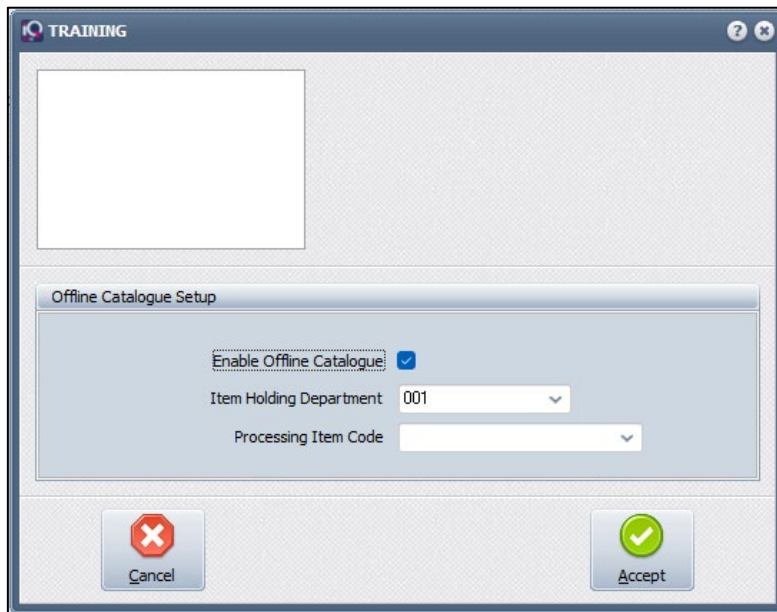
SETUP

In the Main Menu → Utilities → Setup → Module Parameters → Stock
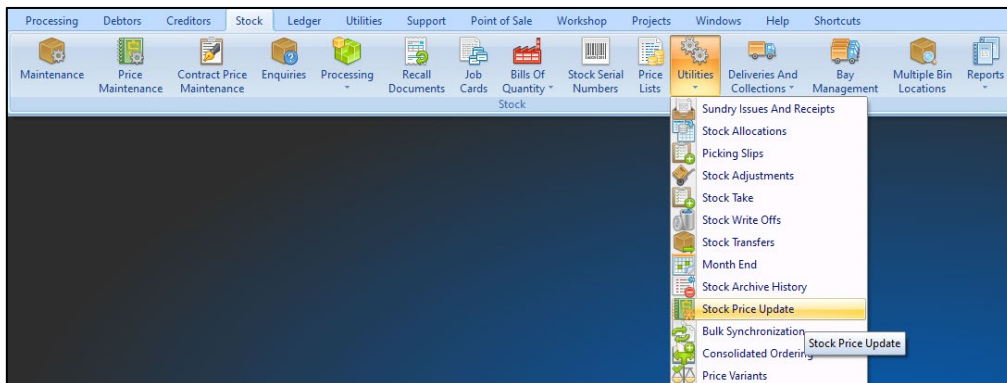

Select the Offline

ENABLE OFFLINE CATALOGUE	Select Enable Offline Catalogue to access the stock item in the catalogue and make the option available under the Stock Price Update Import option.
ITEM HOLDING DEPARTMENT	Select the default Major Stock item department. Will be possible to change if the buyout option is used
PROCESSING ITEM CODE	Creating a Standard Buyout Stock item will allow the user to select the item regularly. The Reason for this can be the item from the catalogue might only be sold once, in other words the item will change every time it is used. If the stock item, then become popular the item can be added to the Stock item list.

In other words, this is where user will specify an existing generic buyout item |

Select Accept to complete the Setup of the Offline Catalogue.

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SETUP CONTINUE

Populating / maintaining Offline Catalogue

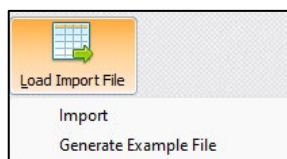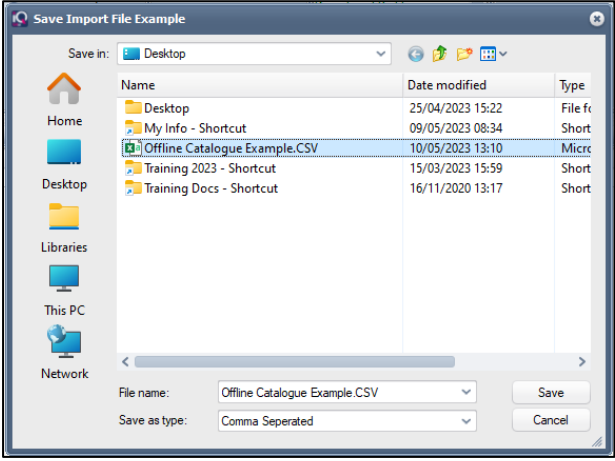In the Main Menu → Stock → Utilities → Stock Price Update

Select the Offline Stock
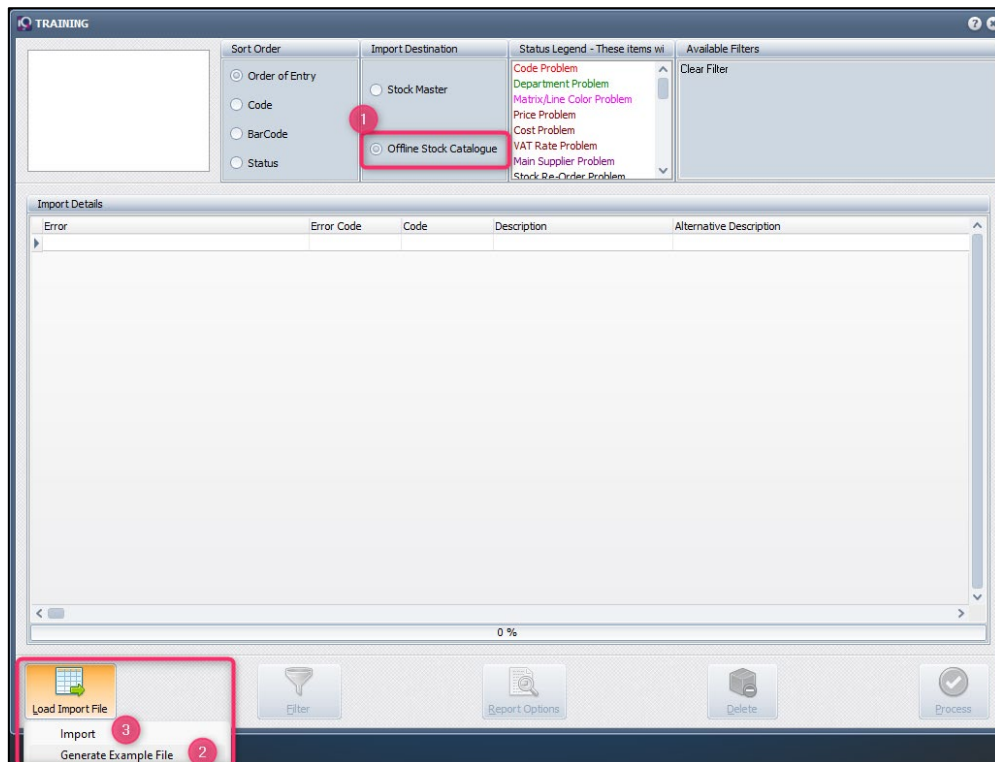
BUTTON FUNCTIONALITY
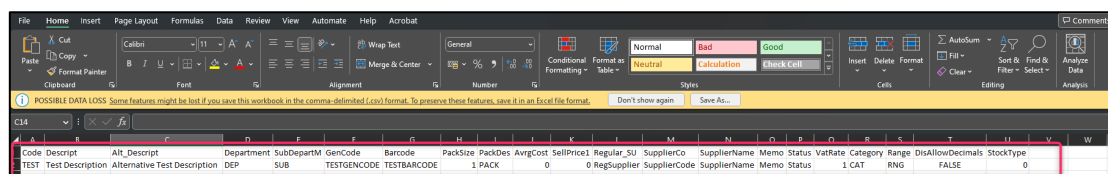
LOAD IMPORT FILE

IMPORT	The Import option will be used to import the CSV text file with the predetermined format. Only fields determined in the Example File can be imported.
GENERATE EXAMPLE FILE	An example CSV file will be created which will assist in the creation of the new stock items to be imported.
	Once the user has clicked on the Generate Example File option, the user will be prompted for an Export location where the newly created CSV file should be saved.
	Once the CSV file has been saved, the user can close the import screen.

IMPORT

Load import file (example below). Similar to 'normal' stock price imports an example file can be generated, but less fields. Data housed in OfflineCatalogue.dat

Open in Ms Excel

Open in Note Pad

Code,Descript,Alt_Descript,Department,SubDepartM,GenCode,Barcode,PackSize,PackDes,AvrgCost,SellPrice1,Regular_SU,SupplierCo,SupplierName,Memo,Status,VatRate,Category,Range,DisAllowDecimals,StockType
TEST,Test Description,Alternative Test Description,DEP,SUB,TESTGENCODE,TESTBARCODE,1,PACK,0.00,0.00,RegSupplier,SupplierCode,SupplierName,Memo,Status,1,CAT,RNG,FALSE,0

IMPORT DETAILS

Once the import of the CSV file is done, all the imported stock items will be displayed on the Stock CSV Import / Update screen.

After the import process has been completed, all the successfully imported items will be removed from the display grid. All items that contained errors have to be rectified in Excel or Notepad and have to be imported again.

FIELD AVAILABILITY

Code, Descript, Alt_Descript, Department, SubDepartM, GenCode, Barcode, PackSize, PackDes, AvrgCost, SellPrice1, Regular_SU, SupplierCo, SupplierName, Memo, Status, VatRate, Category, Range, DisAllowDecimals, StockType

CREATE A CSV FILE

The CSV file which was created as an example, can be imported into Excel or WordPad or Notepad.

NOTE: It is easier to manipulate data in an Excel spreadsheet.

When new stock items are to be imported, there are at least three (3) mandatory fields which must be completed for the file to import correctly:

- Code

- VatRate

- SupplierName

- Department – not required (If you want to add as a stock item Major Department will be mandatory).

VERY IMPORTANT: The created file must be saved in the CSV (comma delimited) file format.
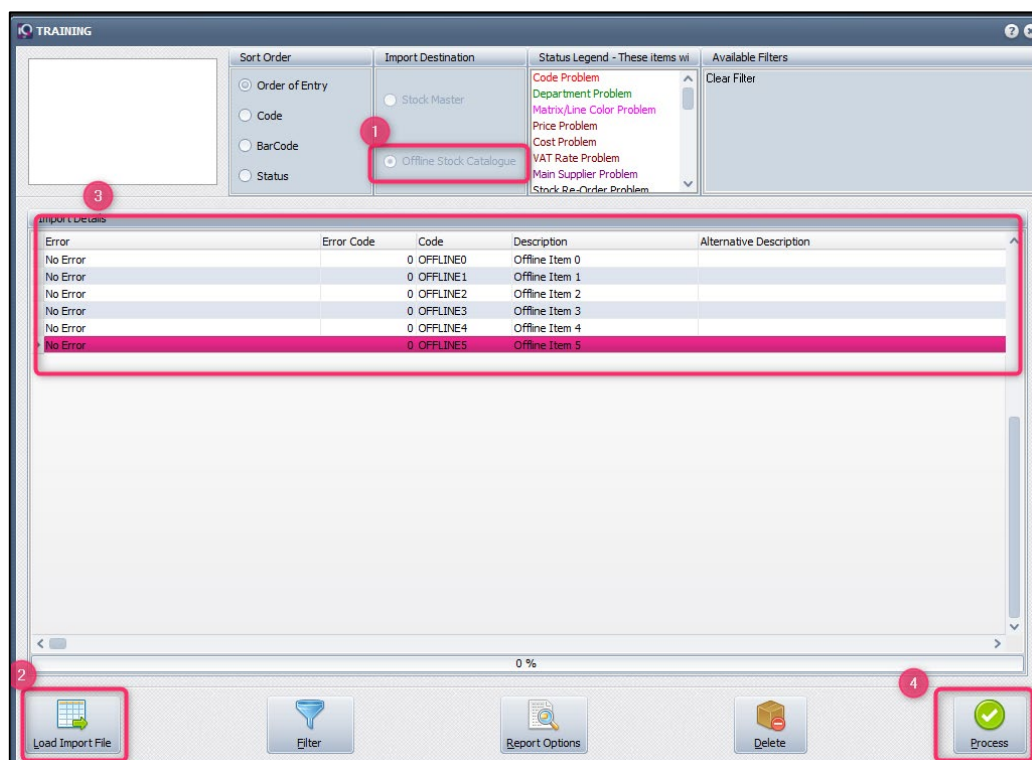
PROCESSING

Offline Catalogue can be accessed in various ways:
Stock Maintenance, Stock Search or Buy item pop-up.

STOCK MAINTENANCE

In the Main Menu → Stock → Maintenance → Catalogue lookup

Select Offline Catalogue

DISPLAY STOCK TEMS

How to display stock items on the Catalogue

Search for the items or Press Enter in the Keyword Field

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ITEMS DETAILS

Select the item and the details will be displayed under the Item Details area.

HOW TO ADD CATALOGUE ITEMS TO STOCK LIST IN STOCK MAINTENANCE

Select one item at a time or select multiple items to add by dragging from left to right or double clicking on the items to move to the right side of the screen.

Select Accept to Continue.

Note: Users can be prevented from accessing the offline catalogue via this method

STOCK SEARCH

In the Main Menu → Processing → Invoicing
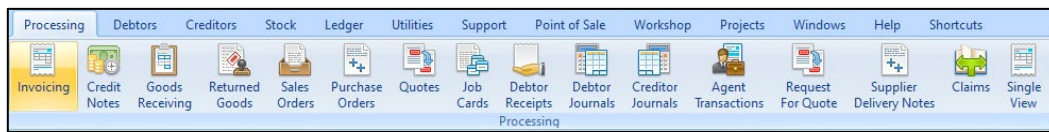
Fill in the detail of the customer and select the Code – Stock Search Drop-down.

Select the Catalogue Lookup

BUYOUT POP-UP

The Buyout option will allow you to use any item from the Offline Catalogue as a Buyout Item. The Buyout Pop-up will be available in Invoicing, Sales Orders and Purchase Orders.

In the Main Menu → Processing → Sales Order

Create a new Sales Order or Edit an Existing Sales Order.

Choose the Buyout Stock Item

Select Offline Catalogue

Select a stock item from the Catalogue and select Accept.

SECURITY:

603920 (Module Parameters Setup) "Offline Catalogue Setup"

130608 (Invoicing) "Allow Offline Catalogue Enquiry"

401126 (Sales Orders) "Allow Offline Catalogue Enquiry"

401221 (Purchase Orders) "Allow Offline Catalogue Enquiry"

82849 (POS) "Allow Offline Catalogue Enquiry"

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