

HOW TO ADD ITEMS TO THE CATALOG FROM SALES ORDERS AND QUOTES

ADD ITEM TO CATALOG

Requirements: Sales Person Setup

In order to add a product from sales orders and quotes, the salesperson must have one or both of the following fields set to Yes. If both fields are set to No, the salesperson will not be allowed to add products to the company catalog.

- **Allow Add Product:** Allows the salesperson to add products to the system.
- **Allow Add Product From Ix:** Allows the salesperson to select and add products from the Ix file.

There are two ways to add a new item to the Product Catalog while working on a sales order or sales quote:

- **Product Search:** While doing a product search, click the **Add** link from the Product Search page of the item you want to import from the Ix Catalog and complete the New Product form.
- **Sales Order Items page:** While on the Sales Orders Items page click the **New Prod** button.

NEW PRODUCT SEARCH

There are two ways to find items that are part of the Ix file.

- **By Vendor:** Enter the UCC, or Alpha Code, or the Vendor name and click **Continue**.
- **By Product Identification:** Enter the UPC or enter the Mfr Catalog# and click **Continue**.

If you are adding an item that is part of the Price Service file (Ix), complete the Price Service Lookup form and click **Continue**. If the item is not part of Ix, click **Continue** without filling anything in, this will open the New Product form.

Ximple - CLOUD
New Product
01/11/2019 11:38:59
Ximple Admin

Price Service Lookup (P0262)

Vendor		Product Identification	
UCC	<input type="text"/>	OR	
Alpha	<input type="text"/>	OR	
Name	<input type="text"/>		
		UPC	<input type="text"/>
		Mfr. Catalog #	<input type="text"/>


Continue >> Cancel

NEW PRODUCT FORM

The New Product page contains all of the fields necessary to add the item to your company catalog and allow you to add the item directly to your sales order or quote. Complete the New Product form and click **Save**.

When you create a new item from a sales order or quote, the item you added will be displayed in the Line Detail portion of the sales order or quote.

Note: The new item is added to the catalog with an incomplete status. The persons in charge of maintaining the company catalog should verify the information and then set the product's flag to Complete.



Ximple - CLOUD
New Product

01/11/2019
11:46:04
Ximple Admin

New Product (P0263)

*Name	98100 THHN-14-BLK-19STR-CU-1000SR		
*Short Description	BUILDING WIRE		
Long Description	THHN; 600 V; 15 AMPERE; CONDUCTOR MATERIAL SOFT ANNEALED COPPER; 14 AWG CONDUCTOR; 19 STRANDS; NYLON JACKET; PVC INSULATION MATERIAL; BLACK INSULATION; OUTER DIAMETER 109 MIL; LENGTH 1000 FT; TEMPERATURE RATING 90 DEG C (DRY), 75 DEG C 514 characters remaining on your input limit		
*Type	Material ▼	Generic	<input type="radio"/> Yes <input checked="" type="radio"/> No
*Manufacturer	98 Copper Building Wire	Stock Item	<input checked="" type="radio"/> Yes <input type="radio"/> No
Brand	Carlton	Inventory Item	<input checked="" type="radio"/> Yes <input type="radio"/> No
*Product Line	01130 - Copper Building Wire THHN - T90 - S	Serialized	<input type="radio"/> Yes <input checked="" type="radio"/> No
Category	Pricing ▼ Default	Lot Controlled	<input type="radio"/> Yes <input checked="" type="radio"/> No
*Price Maint. By	Price Service ▼	System Gen. Lot #	<input type="radio"/> Yes <input checked="" type="radio"/> No
Wire Reel	<input type="radio"/> Yes <input checked="" type="radio"/> No	Scrap Length	
Seasonal	<input type="radio"/> Yes <input checked="" type="radio"/> No	From - To	▼ - ▼
		Allow Wire Cut	<input type="radio"/> Yes <input checked="" type="radio"/> No
		Is Returnable	<input type="radio"/> Yes <input checked="" type="radio"/> No
		Hide for Webstore	<input type="radio"/> Yes <input checked="" type="radio"/> No

Unit of Measure

*Stocking	Unit - Each ▼	
*Selling	Unit - Each ▼	Min Selling Qty 1 Increment Qty 1
*Purchasing	Unit - Each ▼	
*Manufacturing	Unit - Each ▼	
*Sell Price	Unit - Each ▼	

Identification

EAN	
*Mfr. Catalog #	THHN-14-BLK-19STR-CU-1000SR
Nickname	
SKU	
UPC	98010022801

Vendor Item Price

*Vendor	98 Copper Building Wire		
*Distr. Cost	94.3500	US Dollar ▼	Length - Thousand Feet ▼
Vendor Returnable	<input checked="" type="radio"/> Yes <input type="radio"/> No		

Compliance

RoHS Compliance	<input type="radio"/> Yes <input checked="" type="radio"/> No
COOL Compliance	<input type="radio"/> Yes <input checked="" type="radio"/> No
Country of Origin	▼

Save
Reset
Cancel

MAIN DATA SECTION

If the item was selected from the Ix file, information will be pre-loaded. Other information will default from the Product Template.

Ximple - CLOUD		01/11/2019 11:46:04 Ximple Admin	
New Product			
New Product (P0263)			
*Name	98100 THHN-14-BLK-19STR-CU-1000SR		
*Short Description	BUILDING WIRE		
Long Description	THHN; 600 V; 15 AMPERE; CONDUCTOR MATERIAL SOFT ANNEALED COPPER; 14 AWG CONDUCTOR; 19 STRANDS; NYLON JACKET; PVC INSULATION MATERIAL; BLACK INSULATION; OUTER DIAMETER 109 MIL; LENGTH 1000 FT; TEMPERATURE RATING 90 DEG C (DRY), 75 DEG C 514 characters remaining on your input limit		
*Type	Material ▼	Generic	<input type="radio"/> Yes <input checked="" type="radio"/> No
*Manufacturer	98 Copper Building Wire	Stock Item	<input checked="" type="radio"/> Yes <input type="radio"/> No
Brand	Carlson	Inventory Item	<input checked="" type="radio"/> Yes <input type="radio"/> No
*Product Line	01130 - Copper Building Wire THHN - T90 - S	Serialized	<input type="radio"/> Yes <input checked="" type="radio"/> No
Category	Pricing ▼ Default	Lot Controlled	<input type="radio"/> Yes <input checked="" type="radio"/> No
*Price Maint. By	Price Service ▼	System Gen. Lot #	<input type="radio"/> Yes <input checked="" type="radio"/> No
Wire Reel	<input type="radio"/> Yes <input checked="" type="radio"/> No	Scrap Length	<input type="text"/>
Seasonal	<input type="radio"/> Yes <input checked="" type="radio"/> No	From - To	<input type="text"/> - <input type="text"/>
		Allow Wire Cut	<input type="radio"/> Yes <input checked="" type="radio"/> No
		Is Returnable	<input type="radio"/> Yes <input checked="" type="radio"/> No
		Hide for Webstore	<input type="radio"/> Yes <input checked="" type="radio"/> No

- **Name:** Enter the name of the product. Make sure to follow the policy designated by your company regarding product names.
- **Short Description:** Enter a short description of the product.
- **Long Description:** Enter a long description of the product. For items provided by Trade Service or IDW , long descriptions are available for most products.
- **Type:** Use the drop-down list to select the product type. In most cases, you should not change this value.
- **Generic:** Select whether or not the product is generic. (Generic items are typically commodity type items, check with your supervisor when adding these types of items to the system.)
- **Manufacturer:** Use the search field to enter/find the Manufacturer of the product.
- **Stock Item:** Select whether or not the item is Stocking item. A stocking item is an item that the company wants to maintain a level of inventory at all times.
- **Brand:** Use the search field to enter/find the Brand of the product.
- **Inventory Item:** Select whether or not the product is an inventory item.
- **Product Line:** Use the search field to enter/find the product's product line. **Note:** The general company parameter: *Ignore Incoming Ix Comm Code* is checked.
 - If **No:** The system will try and match the product line in the Ix file with the product line in the system.
 - If **Yes:** The system will default the product line from the Product Template.
- **Serialized:** Select whether or not the product is serialized.

- **Category:** Use the drop-down list to select the Category used for pricing. Use the search field to enter/find the correct pricing category name.
- **Lot Controlled:** Select whether or not the product is lot controlled.
- **Price Maintained By:** Use the drop-down list to select who maintains the product price.
- **System Gen Lot#:** Select whether or not the system will generate lot numbers for products at goods receipt.
- **Wire Reel:** Select whether the product is a wire reel.
- **Scrap Length:** If the product is a wire reel, enter the scrap length allowed.
- **Allow Wire Cut:** If the product is a wire reel, select whether or not to allow the wire to be cut from the reel. (Some wire reel items must be sold in full).
- **Seasonal:** Select whether or not the product is a seasonal item (only in stock during a specific time of year)
- **From - To:** If the product is seasonal, use the drop-down list to select the months that the product is in season.
- **Is Returnable:** Select whether or not the product is returnable by the customer.
- **Hide for Webstore:** Select whether or not the product should be hidden from appearing in the Webstore.

UNIT OF MEASURE SECTION

The system uses several types of units of measure. Units of measure enable you to quantify and track inventory items.

- **Units:** These are generally EA=Each, HU=Hundred, TH=Thousand. Older systems used E=Each, C=Hundred, and M=Thousand.
- **Length:** These are generally FT=Foot, HF=Hundred Feet, TF=Thousand Feet. Older systems may have used F=Foot, CF=Hundred Feet, MF=Thousand Feet. In some cases, older systems did not differentiate Unit or Length and used E, C, or M codes for everything.
- **Volume:** These are generally OZ=Ounce, QT=Quart, GA=Gallon.
- **Weight:** These are generally LB=Pound, KG=Kilogram.

This section contains four quantity unit of measure fields, the sell price unit of measure and minimum and increment quantities. It is very important to set the UOMs correctly.

Unit of Measure			
*Stocking	Unit - Each ▼		
*Selling	Unit - Each ▼	Min Selling Qty 1	Increment Qty 1
*Purchasing	Unit - Each ▼		
*Manufacturing	Unit - Each ▼		
*Sell Price	Unit - Each ▼		

- **Quantity Units of Measure:** The stocking units of measure should always be set at the lowest value. Typically this is either Unit-Each, or Length-Foot. Your units of measure may be set up as Unit-EA, or Length-FT. (Example: The lowest UOM for Unit would be Each. The lowest UOM for Length would be

Foot.) If the product uom type is volume or weight, please check with your supervisor regarding the lowest units of measure for the UOM types.

- **Stocking:** Use the drop-down list to select the lowest UOM for the item. (Unit, Length, Volume, Weight).
- **Selling:** Use the drop-down list to select the lowest UOM for the item. (Unit, Length, Volume, Weight)
- **Purchasing:** Use the drop-down list to select the lowest UOM for the item. (Unit, Length, Volume, Weight)
- **Manufacturing:** Use the drop-down list to select the lowest UOM for the item. (Unit, Length, Volume, Weight)
- **Sell Price Unit of Measure:** Use the drop-down list to select the unit of measure that will be used to calculate the sales price for the customer. Should this be each, hundred, thousand, or if the product is sold in lengths, should the price be calculated per foot, per hundred feet, per thousand feet?
- **Min Selling Qty:** Enter the minimum selling quantity of the product. This lets the salesperson know if there is a minimum quantity that must be sold for the item.
- **Increment Qty:** Enter the selling increment quantity for the product. This is how many units of a sale to be incremented by once the minimum selling quantity is met. Example: the product must be sold in quantities of 5. The minimum selling quantity would be set to 5 and the increment quantity would also be set to 5.

IDENTIFICATION SECTION

This section allows you to enter the product identification codes. Products can have more than one type of identifier. Manufacturer Catalog # is required. If the item was selected from the lx file, information will be pre-loaded.

Identification	
EAN	
Mfr. Catalog #	THHN-14-BLK-19STR-CU-1000SR
Nickname	
SKU	
UPC	98010022801

- **EAN:** Enter the 13 digit code for the product. An EAN-13 number includes a 3-digit GS1 prefix (indicating country of registration or a special type of product). If you do not know the EAN, leave the field blank.
- **Mfr Catalog#:** Manufacturer Catalog Number. This field is required.
- **Nickname:** Enter a nickname for the product to be used for product search.
- **SKU:** Enter the Stock Keeping Unit assigned to the product. If you do not use SKUs, leave the field blank.
- **UPC:** Enter the Universal Product Code for the product. (**Note:** if using Trade Service or IDW, use the 11 digit code). Some products do not have UPC identifiers, if that is the case, leave the field blank.

VENDOR ITEM PRICE SECTION

This section identifies the vendor you will purchase from. If the item was selected from the Ix file, information will be pre-loaded. It is recommended that you check if the pre-loaded price is correct before saving the item.

Vendor Item Price			
*Vendor	98 Copper Building Wire		
*Distr. Cost	94.3500	US Dollar ▼	Length - Thousand Feet ▼
Vendor Returnable	<input checked="" type="radio"/> Yes <input type="radio"/> No		

- **Vendor:** Use the search field to enter/find the vendor for the product.
- **Distr. Cost:** Enter the distributor cost for the item.
 - **Currency:** Use the drop-down list to select the currency.
 - **Unit of Measure:** Use the drop-down list to select the correct unit of measure.
- **Vendor Returnable:** Select whether or not the item can be returned to the vendor.

COMPLIANCE SECTION

If the item was selected from the Ix file, information will be pre-loaded.

Compliance			
RoHS Compliance	<input type="radio"/> Yes <input checked="" type="radio"/> No		
COOL Compliance	<input type="radio"/> Yes <input checked="" type="radio"/> No	Country of Origin	▼

- **RoHS Compliance:** Stands for Restriction of Hazardous Substances. Select Yes or No.
- **COOL Compliance:** Stands for Country of Origin Labeling. Enter Yes or No.
- **Country of Origin:** Use the drop-down list to select the Country of Origin.