

Enable Catalog Ordering

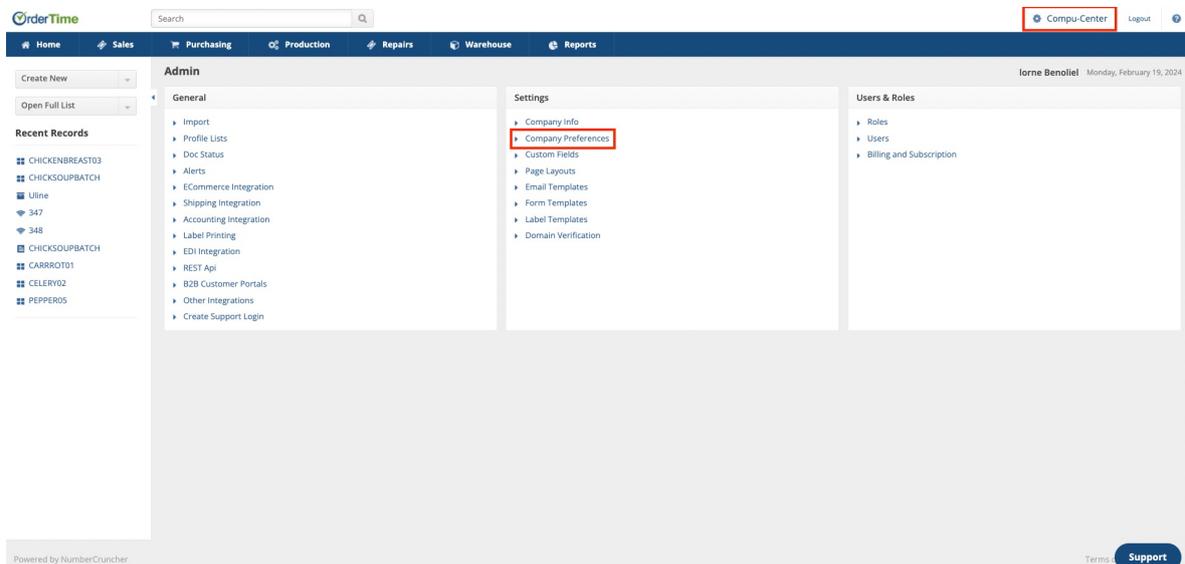
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Overview

In today's fast-paced sales environment, the ability to quickly and efficiently add multiple items to a Sales Order is crucial. The purpose of catalog ordering within the Order Time system is to expedite this process, providing sales representatives with a streamlined method to browse, select, and add items to Sales Orders. Moreover, catalog ordering offers the added advantage of displaying key statistics about each item directly in the catalog view. This feature is designed to give sales reps valuable insights into the products they are considering, enabling them to make informed decisions about what to include in a customer's Sales Order.

With the steps outlined below, users can easily enable catalog ordering in their Order Time account, access the catalog, select items, and utilize advanced features such as filtering the catalog and employing customer item aliases, enhancing the overall sales order process.

How to Enable Catalog Ordering



1. Navigate to the **Admin Menu**
 - o Click on your company name in the top right corner of your Order Time screen.
2. Access **Company Preferences**
 - o Click on "Company Preferences" in the Settings column.
3. Navigate to **Sales Preferences**
 - o Move to the Sales section of the menu.
4. Enable Catalog Ordering
 - o Click the **Advanced tab** and scroll down to find the checkbox labeled "**Enable Catalog**

Ordering"

- Select the checkbox to enable catalog ordering for your account.
- Click **Save**

OrderTime

Admin > Company Preferences

Company Preferences

General Rounding **Advanced**

Sales - Advanced

- Limit items for selling to items that have an item # listed for the current customer
- Use last customer price (ignores pricing levels)
- When adding items to sales documents show all price level pricing, including price levels assigned to other customers.
- Move attachments from quote to sales order on conversion.
- Apply price levels to Kit selections.
- Enable generating vendor RFQs from quotes.
- Require Ship Method.
- Show kit selections on sales orders and quotes.
- Calculate tax rates based on zip codes instead of Item Sales Tax
- When printing a form template with styles, show the variants as rows instead of in matrix format.
- Enable creating a transfer from a sales order.
- Use sales order promise dates on linked work orders.

Default Location

- Enable Location lookup based on Shipping Regions
- Highlight line items with inventory deficiencies
- Enable charging additional fees on orders
- When adding an item to a quote or sales order, increment the quantity instead of adding a new line no.
- Validate Shipping Address
- Enable Allocation

Enable Catalog Ordering - Beta

Accessing the Catalog

- To access the catalog when adding items to your sales orders, click the button labeled "Catalog"

OrderTime

Sales > Sales Orders > Sale Order

Sales Order - 26

General

No. 26
Customer: Bob Barker
Date: 2/19/2024
Promise Date: 2/19/2024
Customer PO
Contact
project number #

Bill Address map
PACIFIC CREST FINANCIAL SERVICES
123 FORMULA DR
NAPERVILLE, ILLINOIS 14520
UNITED STATES

Ship Address map
PACIFIC CREST FINANCIAL SERVICES
123 FORMULA DR
NAPERVILLE, ILLINOIS 14520
UNITED STATES

Summary Revision: 1

Subtotal	0.00
Ship Amount	0.00
Discount Amount	-0.00
Taxes	0.00
Total Amount	0.00
Paid	-0.00
Balance	0.00

Items Details Memo & Instructions Custom Payments Ship Docs Dependency Attachments Open Activities Activity History

Name/Number Search Item Scan **CATALOG**

LINE NO.	ITEM	DESCRIPTION	QUANTITY	FILLED	UOM	PRICE	EXT.	TAX CODE	CLEARED	ACTIONS
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- **Select Items and Add to Sales Order**

- On the catalog page, select the **quantity** of the items you want to add to your sales order.
- Hit the button in the top left corner to add the selected items to your sales order.

Open Full List Customer: Bob Barker

Recent Records

- 26
- 05-GRN-CONC-65(C6G)
- 09555
- Bob Barker
- CHICKENBREAST03
- CHICKSOUPBATCH
- Uline
- 347
- 348

05-GRN-CONC-65(C6G) 485.00 Available

NO IMAGE potion

Availability: In Stock Price 53.75

Weight: Tax Code Non

53.75 Quantity EA

09155-BRMPH-24BR-ASS 291.00 Available

NO IMAGE Mithril plate

Availability: In Stock Price 22.78

Weight: Tax Code Tax

22.78 Quantity EA

09360-00-BRUGR 892.00 Available

NO IMAGE Iron Helmet

Availability: In Stock Price 17.96

Weight: Tax Code Tax

17.96 Quantity EA

09555 589.00 Available

NO IMAGE Ore

Availability: In Stock Price 78.00

Weight: Tax Code Tax

78.00 Quantity EA

09820-00-BUCMO 639.00 Available

NO IMAGE Silk Vest

Availability: In Stock Price 53.48

Weight: Tax Code Tax

53.48 Quantity EA

09940-00-MOPBO 970.00 Available

NO IMAGE glass armband

Availability: In Stock Price 1.90

Weight: Tax Code Tax

1.90 Quantity EA

17250-20-TECAS 448.00 Available

NO IMAGE echo screen

Availability: In Stock Price 49.50

Weight: Tax Code Tax

49.50 Quantity EA

17348-20-TCARB 278.00 Available

NO IMAGE phoenix down

Availability: In Stock Price 48.00

Weight: Tax Code Tax

48.00 Quantity EA

17350-20-CARBC 148.00 Available

NO IMAGE phoenix pinion

Availability: In Stock Price 59.99

Weight: Tax Code Tax

59.99 Quantity EA

17450-20-POWCA 84.00 Available

• Filter the Catalog

- You can filter the catalog with all of the filters available on a regular list view.
- To filter down the catalog to the categories you would like, click the cog icon.
- For more information on filters, see ["List Filters"](#)

• Utilize Customer Item Aliases

- If you have customer part numbers or aliases that you want to add to Items or see while utilizing the catalog, there is a section at the bottom of the page.
- For more information about item aliases, see ["Utilizing Item Aliases"](#)

⚙️ 📄 📧
Add

ITEM	CUSTOMER PART NO	NOTE	ACTIONS
05-GRN-CONC-65(C6G)	20122-Test Alias		📄 ⚙️
09555	10121-Test alias		📄 ⚙️

Total Records: 2

By following these steps, you can easily enable catalog ordering in Order Time and utilize the catalog when adding items to your sales orders.