

Application	ChreosClient – Chreos 3
Module	Stock
Access	“Stock Price Book”
Minimum service pack	SP39
This document	Price Book Search Ref 5.22 Published May 2004

Overview

“Price book Search” allows items that have been loaded into price book to be located and their details to be imported to Chreos stock data. An item can then be imported into Chreos. Note: This screen searches all data that has been loaded into price book through “Stock | Load price book data”. Refer to “Load Price Book Data (5.22)”.

Text Search

Overview

This tab page is used to search for an item in the price book.

Details Displayed

- **Search Field.** The field that the ‘Starting with’ and ‘Containing’ fields are searching.
- **Starting With** – Enter all, or the first part of the ‘Search field’ that is being searched. This is not case sensitive.
- **Containing** – Enter any part of the ‘Search field’. This is not case sensitive. While this is not a multi-word search it will find a string that is offered where a string is a contiguous group of letters, spaces and other characters. For example, ‘a ch’ as a search brings up ‘Nutra **ch**oc 100g’ and ‘Sancho tortilla **ch**ips double cheese 190g’. To search for two words that do not form a single string, search for one and then search for the other as a second search on the subset. Refer to ‘To search for an item’ on this information sheet.

Form View

Overview

This tab page displays various details for the item currently selected from the results grid of the “Text search” tab page. Note: Most of these details are also displayed on the results grid.

Details Displayed

- **Item Code.** The code used to identify the stock item.
- **Item Code 2.** The second code for the item if required. Note, this will only be displayed if you have set Chreos to use 'Item 2' in "Setup (9.1)".
- **Item Name.** The name of the item.
- **Item Type.** The item type of the item.
- **Product Code.** The product code of the item. Note: This field is a display field on this tab page and in the "Price book search" screen only. It will not correspond with a standard Chreos field but can be used for searching in the "Text search" tab page of "Price book search".
- **Category.** The category of the item.
- **Availability.** The availability of the item. Note: This field is a display field on this tab page and in the "Price book search" screen only. It will not correspond with a standard Chreos field but can be used for searching in the "Text search" tab page of "Price book search".
- **Supply Code.** The supplier's code for the item.
- **Make & Maker.** Two user-defined fields. These can be defined under "Setup (9.1)". To clear this combo once an option has been selected right-click and select 'Clear selected field'.
- **Quantity on Hand.** The quantity of the item that is currently in stock.
- **Cost Price.** The cost price of the item.
- **Cost Currency.** The currency that the 'Cost price' for the item is in. Note: This field is a display field on this tab page and in the "Price book search" screen only. It will not correspond with a standard Chreos field but can be used for searching in the "Text search" tab page of "Price book search".
- **Date Processed.** The date that the item was imported through the price book wizard. Note: This field is a display field on this tab page and in the "Price book search" screen only. It will not correspond with a standard Chreos field but can be used for searching in the "Text search" tab page of "Price book search".
- **Sell Price.** The selling price of the item.
- **Sell Currency.** The currency that the 'Sell price' for the item is in. Note: This field is a display field on this tab page and in the "Price book search" screen only. It will not correspond with a standard Chreos field but can be used for searching in the "Text search" tab page of "Price book search".
- **Sell Price Includes Tax.** Whether or not the sell price includes tax. The currency that the 'Cost price' for the item is in. Note: This field is a display field on this tab page and in the "Price book search" screen only. It will not correspond with a standard Chreos field but can be used for searching in the "Text search" tab page of "Price book search".
- **User Defined Fields.** 3 check boxes, 2 character boxes, and 2 combos. These are user-defined fields that can be defined under "Setup (9.1)". If one is not defined then an empty space will appear in its place.

To Search for an Item

- Set the parameters on the “Text Search” and click [Find Now].
- As you complete each search, the results grid will display the matches found. If there are no matches the table will be empty.
- To do a further search on the results of the previous search and further narrow down the results, enter the new parameters and click [Find Now]. The parameters of the search/es will be displayed on the right of ‘Search Field’.
- To return to the previous search, click [Back].
- To clear all previous searches and start a new one, click [New Search].
- When an item is selected on the results grid further details can be viewed on the “Form view” tab page or it can be imported into Chreos by clicking the [Import] button. Refer to ‘Form view’ on this information sheet.
- Note: The search engine does not support searches for suppliers or true/false fields.

To Import an Item

- Search for the item.
- Select the item from the results grid.
- Click the [Import] button.
- “Stock management” will open with the “Item detail” tab page displayed. The “Source Data” tab page will also be displayed as part of the “Item details” tab page. Refer to ‘Source data’ on this information sheet.
- Some of the fields on the “Item details” tab page will automatically contain the corresponding information from price book and others will default to the first option available. Refer to “Source data” on this information sheet for details on which fields are displayed and the functionality of those fields.
- Enter an extra information required. This is done in the same way as entering the details for a new item. Refer to “Stock management (5.1)”.
- Click the [Save] button.
- A new item from the same search results can be imported by clicking the [Next] or [Previous] buttons until the required item is found. Click the [Add] button and enter the required details into the “Item details” tab page.
- Refer to “Stock management (5.1)” for further information regarding the “Item details” tab page.

Source Data

Overview

This tab page displays the imported information of the item currently selected on the results grid of the “Text search” tab page. This tab page only appears

when importing an item from price book into Chreos and is displayed as part of the “Item details” tab page of “Stock Note: When this screen is first displayed it is in edit mode and it is not a standard page of “Stock management”, it is only available through “Stock | Price book search”.

Details Displayed

The following fields from the “Form view” tab page are displayed:

- **Name.** Note: This field is unlabeled. The data in this field is automatically transferred to the ‘Item code’ field on the “Item details” tab page.
- **Item Code.** The data in this field is automatically transferred to the ‘Item code’ field on the “Item details” tab page.
- **Item Code 2.** If this field is set up the data in this field is automatically transferred to the ‘Item code’ field on the “Item details” tab page.
- **Item Type.** The item type of the item. The closest match available will be selected in “Item details”.
- **Category.** The ‘Category’ field on the “Item details” tab page will try to find an exact match to the category on this tab page. If it is not successful it will default to the first category available. To transfer the data in this field into the ‘Category’ field on the “Item details” tab page click the [...] button. When a new ‘Category’ is transferred it is automatically entered as a new category in “Stock | Stock maintenance | Stock lookups”.
- **Make.** The ‘Make’ field on the “Item details” tab page will try to find an exact match to the make on this tab page. If it is not successful it will default to the first make available. To transfer the data in this field into the ‘Make’ field on the “Item details” tab page click the [...] button. When a new ‘Make’ is transferred it is automatically entered as a new category in “Stock | Stock maintenance | Stock lookups”.
- **Maker.** The ‘Maker’ field on the “Item details” tab page will try to find an exact match to the maker on this tab page. If it is not successful it will default to the first maker available. To transfer the data in this field into the ‘Maker’ field on the “Item details” tab page click the [...] button. When a new ‘Maker’ is transferred it is automatically entered as a new category in “Stock | Stock maintenance | Stock lookups”.
- **Sell.** The data in this field is automatically transferred to the ‘Sell price’ field on the “Item details tab page.
- **Sell Price Includes Tax.** This field is display only.
- **Sell Currency.** This field is display only.
- **Cost Price.** This field is display only.
- **Cost Currency.** This field is display only.
- **Availability.** This field is display only.
- **Supplier Code.** The code in this field will be saved in the ‘Supplier’s code’ field on the “Supplier” tab page of “Stock management”. The supplier’s name will be entered into the ‘Supplier field’ on the same page.

- **Quantity on Hand.** This field is display only.
- **User Defined Fields.** The user-definable field on the “Item details” tab page will try to find an exact match to the entry on this tab page. If it is not successful it will default to the first entry available. To transfer the data in this field into the two user-definable combos on the “Item details” tab page click the [...] button. When a new entry is transferred to one of these fields it is automatically entered as a new category in “Maintenance | Support tables | Local values”.

To Edit an Item

An item can be edited on the “Source data” tab page when it is scrolled to using the [Previous] and [Next] buttons and it has previously been imported into stock. Note: Price book determines that an item has already been imported into Chreos if the ‘Item code] already exists.

- Select the required item.
- Click the [Edit] button.
- Make the required changes.
- Click the [Save] button.

When To Use Price Book Search

- To search for a single item across multiple suppliers.
- To import the supplier’s item from price book and into Chreos data;

An Example of Using the Price Book Search

Use the search functionality to focus the data down to a group of items, many of which you want to import. Click the [Import] button for the first item and on the “Source data” tab page make sure that the imported details are correct. Click the [Save] button and then use the [Previous] and [Next] buttons to move through the results list. Click [Add] and [Save] for each required item. If the [Edit] button is enabled that means the item is already available in Chreos.

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