Multi-Vendor Catalog

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Getting Started

Technical Support

Welcome to the instructional manual for the Multi-Vendor Catalog module within the Eagle Business Management System (EBMS). Eagle Solutions is pleased to provide you with instructions and tips regarding the Windows version of EBMS. In the sections following, explanations and examples of the available features in the Eagle Business Management System will be explained for optimal use of the System. If you need to reach our staff for further help, contact us using the information below:

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Overview

The Multiple Vendor Catalog module is an EBMS add-on that allows the user to view or select parts or products from a vendor supplied product list or file. This module includes many powerful features that allow the user to accomplish the following:

- The user can view information from multiple vendors, with varied file formats, from a common interface without adding all the parts into the EBMS inventory system.
- The vendor supplied parts information can be viewed or selected from within EBMS using the inventory list dialog. This allows the user to select a product from a vendor-supplied list from within an EBMS invoice.
- Product information can be copied into the EBMS inventory database without retyping descriptions, costs, and other details from the vendor's product list.
- List pricing, unit costs, UPC codes, and other information can be updated directly from a list or file supplied by a vendor.

Vendors distribute their product information in a variety of file formats with a variation of product information. Organizing and viewing this valuable information with a common interface can save a lot of time and frustration. Not only can this information be viewed from within EBMS but the information can directly update inventory items within EBMS.

The following file formats are recommended:

- Dbase II, III, IV or FoxPro - *.DBF (No conversion required)

Converted by MS Excel

- Excel - *.XLS
- Comma delimited - *.CSV
- Text (Tab delimited & fixed width) - *.TXT
- Data interchange - *.DIF
- Lotus 123 – *.WKS, *.WK1, *.WK3, *.WK4

Refer to the Creating an EBMS Compatible File Using MS Excel

This module simplifies inventory management within EBMS since only selected items are imported into the EBMS inventory list. This minimizes clutter within the user's product list.

This Multiple Vendor Catalog module can also be used to update the EBMS inventory file with new pricing based on a specific date. Export the current price list into MS Excel and then import back into EBMS at the time the changes are required.

Adding a New Vendor Catalog

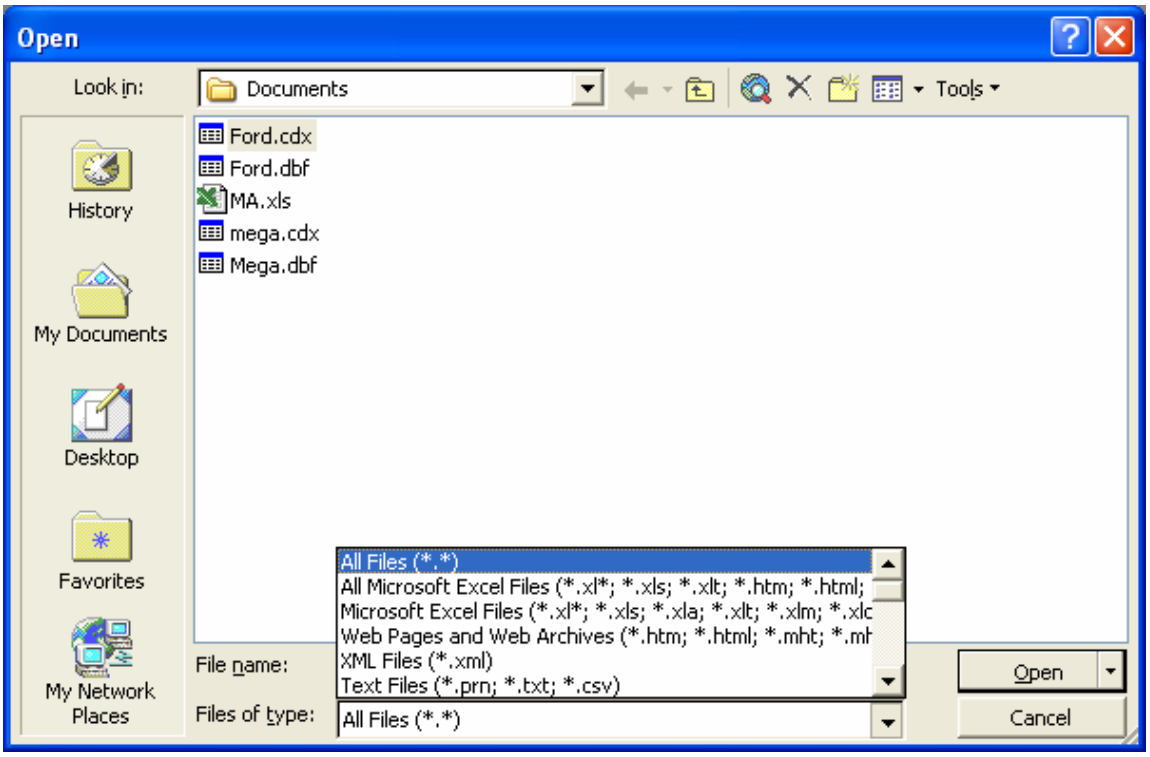
Creating a EBMS Compatible File Using MS Excel

All Vendor Catalogs must be converted to a Dbase or FoxPro compatible file (*.DBF) in order to be read by this product.

When using MSExcel to convert a spreadsheet into a database file, it becomes important to first define the data in the spreadsheet cells with characteristics that are compatible with and which will convert to the data format of database cells.

Complete the following steps using Microsoft Excel:

1. Open MS Excel. Microsoft Excel is included in all MS Office suites or can be purchased as a separate application. MS Excel or MS Office can be purchased at any computer software store.
2. Select the **Open** option from the **File** menu within MS Excel and the following dialog will open:



3. Set the **Files of Type** option to **All** or the specific file type that is being imported.

4. Select the file to import. Excel may use an import wizard depending on the data type. Complete the import wizard to import the data in each column into Excel so that each field or column in the file is within separate cells in Excel.

5. If data appears as "######" (cell data overflow error) or "3.2986+E11" (scientific notation for cell number overflow error), columns of the spreadsheet must be expanded to resolve overflow errors. Cells with overflow errors are likely to be discarded during conversion.

6. The data must be formatted to specific standards to successfully convert to a Dbase format. (Use the Eagle WDBMaint utility to change the format if the original file is in DBF format.) Repeat the following formatting steps for each column based on the type of data within the column:

   a) Time Data – Time data will not be converted to dBase properly without using the TEXT worksheet function within Excel. For example, to change the time 12:34 PM to text data, use the function =TEXT("12:34", "hh:mm AM/PM"). Complete the next step (Text Data) as well for time data.

   b) Text Data – Information such as part numbers, IDs, alphanumeric codes, and numeric codes such as phone numbers must be formatted as text (left justified).

      i) Highlight column **-** Highlight the entire column by clicking on the column label above the data (Example: A for the first column)

      ii) Format as Text - Select **Format > Cells** to format cell. Select **Text** category within the **Number** tab. Do not use cells formatted as General since text that appears as formulas could alter the text.

      iii) Set column font to Currier - Apply a monospaced font such as courier within the **Font** tab.

iv) Adjust column width - Select **Format > Column > Autofit Selection**. This step will widen the column to the maximum width required to include all text. If the text information in a column is greater than the visual width of the Excel, cell the data will be truncated.

c) Numeric Data

i) Highlight column **-** Highlight the entire column by clicking on the column label above the data

ii) Format as Date - Select **Format > Cells** to format cell. Select **Number** category within the **Number** tab. Note that all text within this column becomes null when copied into the dBase file.

iii) Do not use the "1000 Separator" option.

iv) Set the 'Negative Numbers:' selection to '-1234.10'

v) Set number of decimals – Most numeric fields within EBMS are set with 2 decimals although cost fields may have more than two.

d) Date Data

i) Highlight column **-** Highlight the entire column by clicking on the column label above the data

ii) Format as Number - Select **Format > Cells** to format cell. Select **Date** category within the **Number** tab.

e) Inventory UPC Code Data

i) Special treatment is required. A UPC is composed solely of numbers, however it must be converted to alpha-numeric data.

ii) Highlight column **-** Highlight the entire column by clicking on the column label above the data

iii) Format as Text - Select **Format > Cells** to format cell. Select **Custom** category within the **Number** tab. Do not use cells formatted as General since text that appears as formulas could alter the text.

iv) Set the 'Type:' selection to '000000000000' [12 zeros]. It is also imperative that UPC codes be exactly 12 digits long. If this format option is not present, you will need to define it.

Complete the steps listed above for each column.

7. Enter a field label for each column in row one if it does not already exist. To add labels above row one, highlight a cell on row one and select **Insert > Row** from the Excel menu. Enter a field name into each column describing the text.

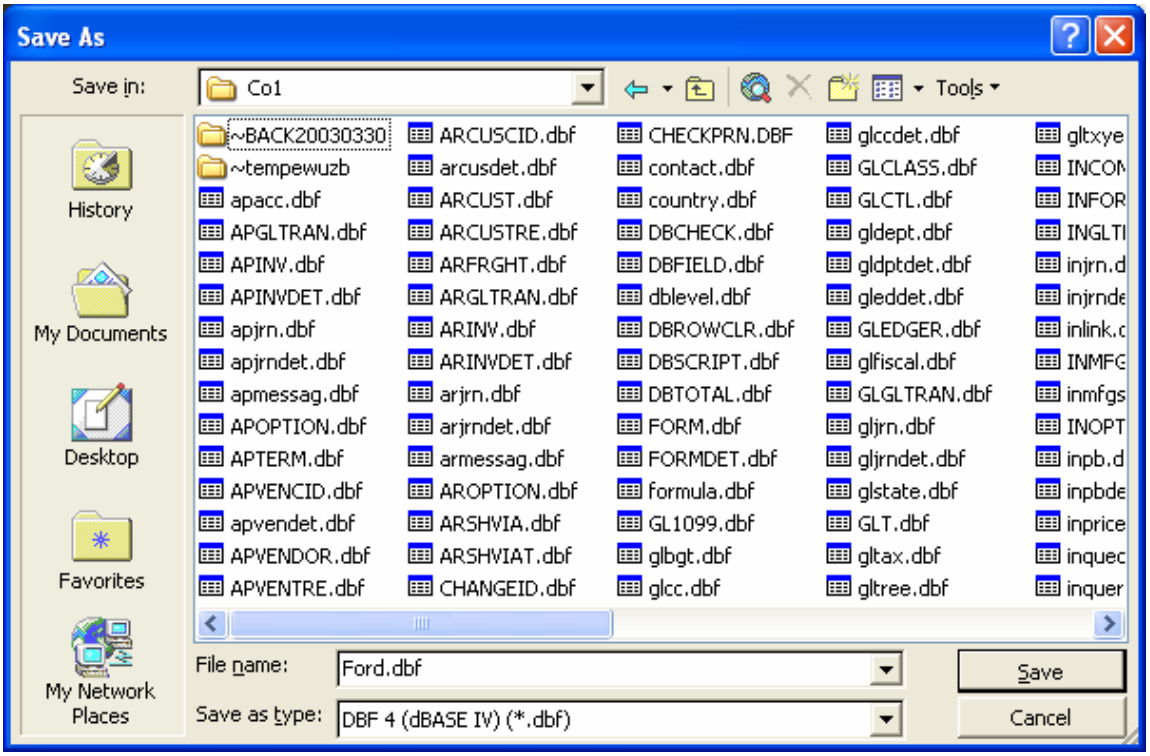
8. Enter a data definition for each column in row two if it does not already exist. To insert a line for definitions, highlight a cell on row two and select **Insert > Row** from the Excel menu.

a) For those columns of data that should be considered alpha-numeric (i.e. characters or text), place one (or more) Z's in the cell of row #2.

b) For those columns of data that should be considered as numeric, place one or more 9's in the cell of row #2.

9. Identify the data that is to be saved in the database. If there is no range named "Database" on the sheet, the data in all directions to the first empty row or column will be saved. To specify a range select **Insert > Name > Define**. Name a range "Database" and specify the range of the database in the **Refers To** entry.

10. Save data as a DBF file. All formatting must be done before the file is saved as a DBF file. Select File > Save As from the Excel menu to open the following dialog:



11. **Save** the file **in** the EBMS data directory. Select **File > Company > Advanced Tab** from the EBMS menu to view the current **Data Path**.

12. The **Save as type** setting must be set to **DBF 4 (dBase IV)**.

13. Enter a file name that identifies the vendor and click on the **Save** button to save the file.

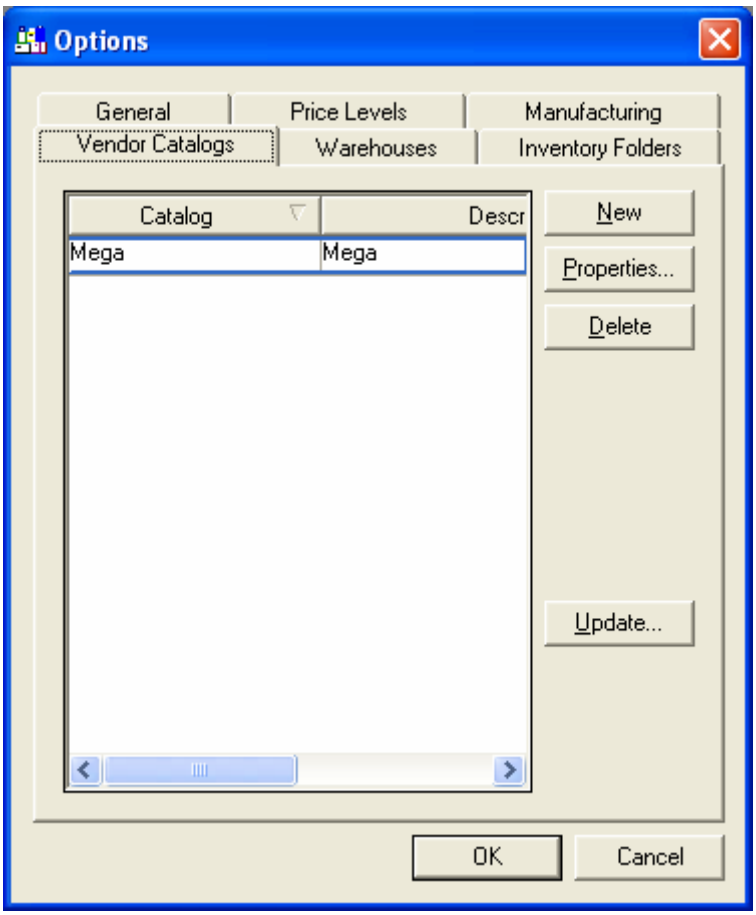
Repeat the steps listed above for each Vendor Catalog file.

Review the steps of creating a file index and connecting the file to EBMS in the next section.

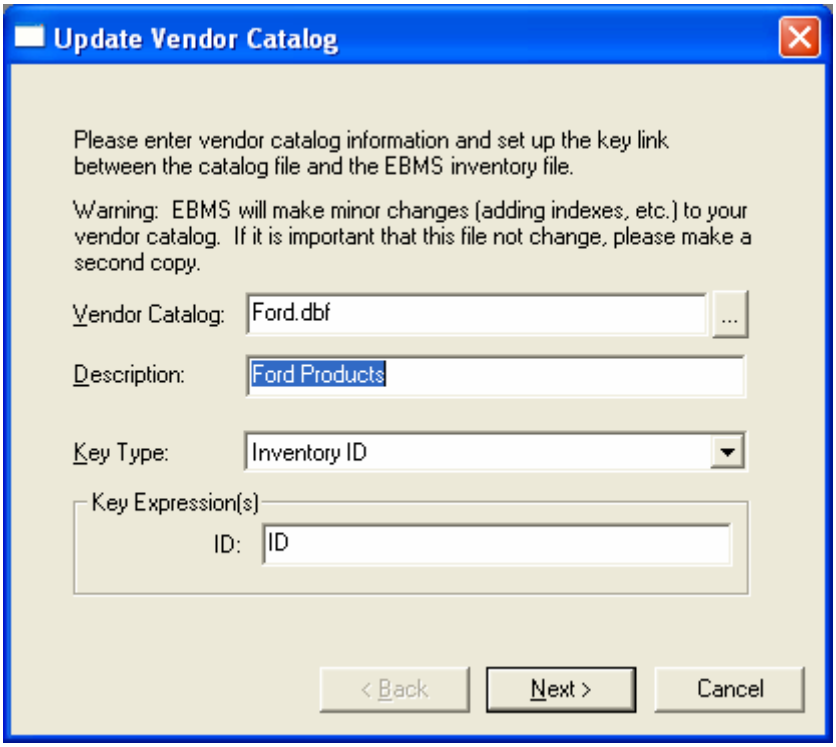
Creating a relationship between the Product Catalog and EBMS

A vendor's product catalog file must be in dBASE (*.DBF) format and must be saved in the company's data directory before continuing with this section. See the previous section for details in using MS Excel to convert files to the DBF format.

1. Select **Inventory > Options** from the EBMS menu and click on the **Vendor Catalogs** tab as shown below:



2. Click on the **New** button to open the catalog dialog:



3. Enter the **Catalog File** name or click on the lookup button to the right of the field to select the database from the file list.

4. Enter a brief **Description** of the product catalog.

5. Select the appropriate **Key Type**. This setting determines how product information within the catalog file is related to the EBMS inventory items. The key must be unique for every product in the catalog. The following options are available:

- **Manufacturer + Manufacturer Part Number** – This option links the vendor catalog field names entered in the **Key Expressions** to the manufacturer and part number in the fields on the **Inventory Item General** tab. This option should be used if the manufacturer of the products distributes the product catalog that is being created.

- **UPC Code –** This setting should be used only if the UPC Code is the only unique product ID in the vendor's catalog.

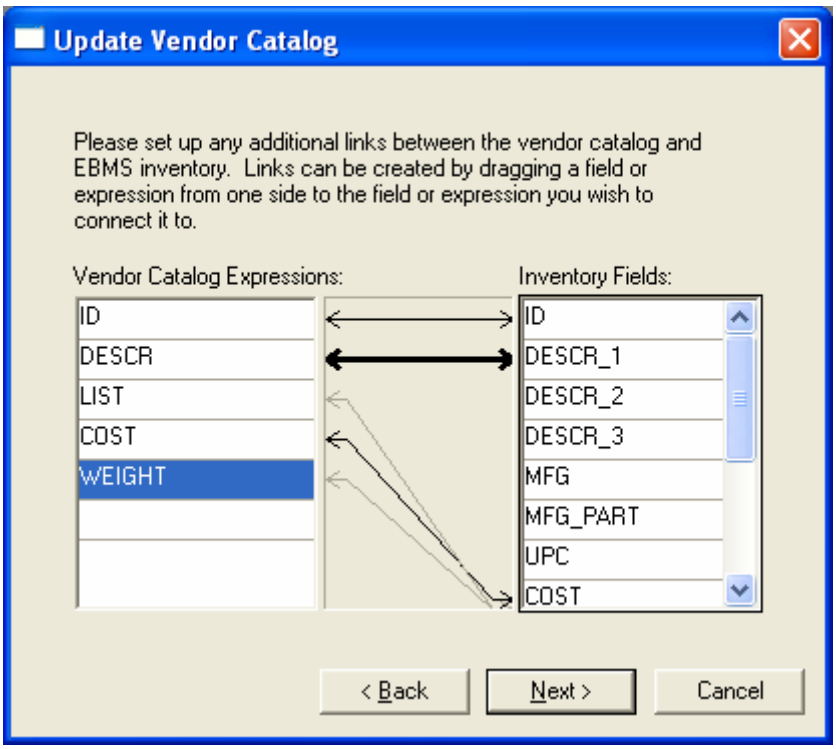
- **Inventory ID –** This option should be used if the EBMS inventory ID is the same as the vendor's part number in the catalog. The inventory ID within EBMS can also be created by a dBase formula within the ID expression.

- **Distributor + Distributor Part Number -** This option links the vendor catalog filed names entered in the **Key Expressions** to the vendor and part number in the **Purchasing** tab of the fields on the **Inventory Item**. This option should be used if the distributor rather than the manufacturer is distributing the product catalog.

6. Enter the **Key Expression(s)**. The vendor catalog field name containing the part number or id should be typed in the expression field without quotes or any other punctuation. These expressions will normally contain field names but may contain static text or dBase formulas. All static text must be enclosed with double quotes. For example if the entire products catalog is from a single manufacturer or distributor, the manufacturer or distributors id should be enter as "FORD" including the double quotes.

   Reminder: The combination of all the **Key Expression** information must be unique for every product that is imported into EBMS.

7. Click the **Next** button to continue.

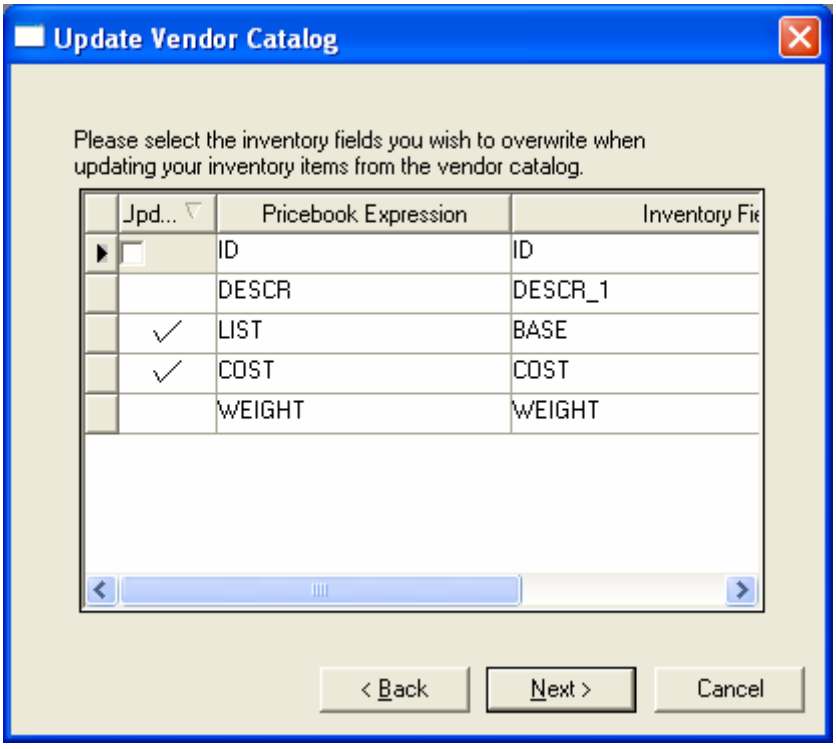


   The fields within the product **Catalog Expressions** must be associated to the **Inventory Fields** found in EBMS. Click on the **Catalog Expressions** on the left and drag them (by suppressing the left mouse button) to the appropriate **Inventory Field** on the right. A connecting line will show to indicate the associations between the two files.

8. Right click on the connecting line and select **Delete Link** to remove a link.

   This association will determine what information is copied from the vendor's catalog file into EBMS when a new item is created in inventory.

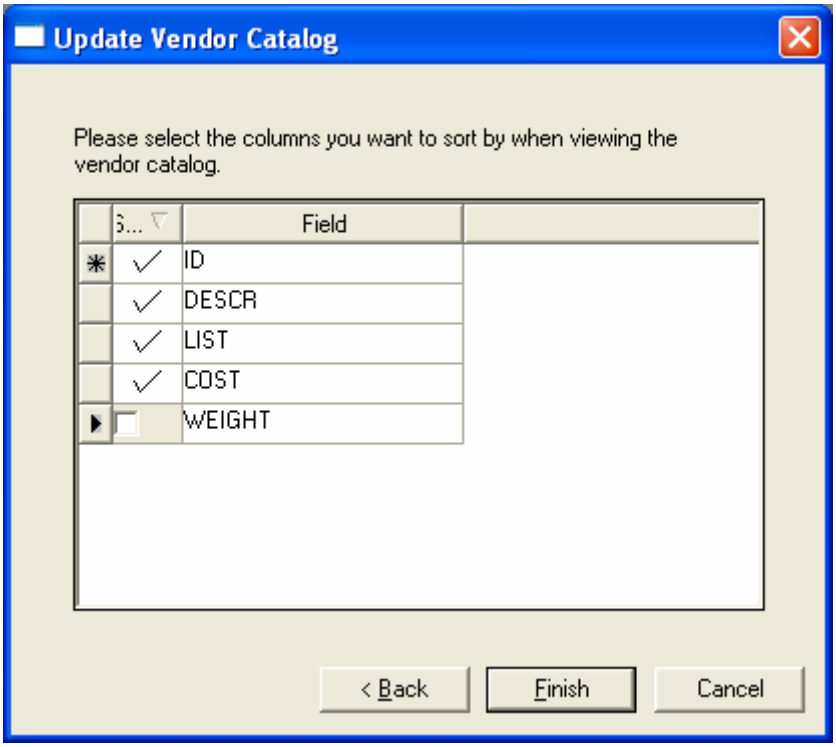
9. Click **Next** to continue.



EBMS facilitates information updates from Vendor Catalogs such as price, UPC, or part number changes. Review the Updating a Vendor's Product Catalog section of this manual for more details and features of this update.

10. Select the information that is to be copied to EBMS during the update procedure by checking the field OFF or ON.

11. Click the **Next** button to continue.



Any column checked on this page can be used to sort the products within the vendor's catalog. Removing the check marks of fields or columns that will never be used to sort will enhance performance of the list.

Click the **Finish** button to complete.

You can change the values set by this wizard by selecting the product catalog from the list and clicking on the **Properties** button. Note the tabs to change **General**, **Links**, **Update**, and **Sort** controls.

Using the Vendor Catalog

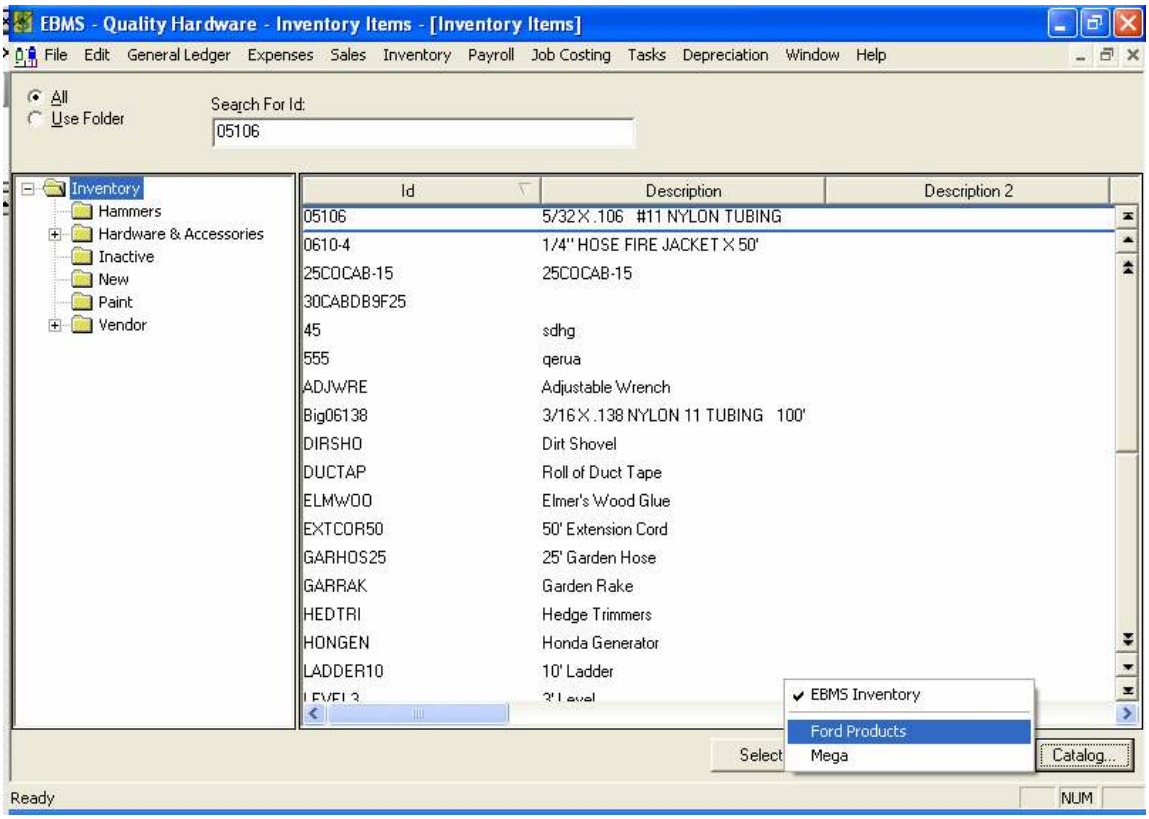
Creating Inventory Items from a Product Catalog

The Multiple Vendor Catalog module can be a time saver when a larger number of inventory items as well as item details need to be entered into EBMS. Product information can be copied directly into the EBMS inventory database without retyping descriptions, costs, manufacturer's part numbers, and other details from the vendor's catalog.

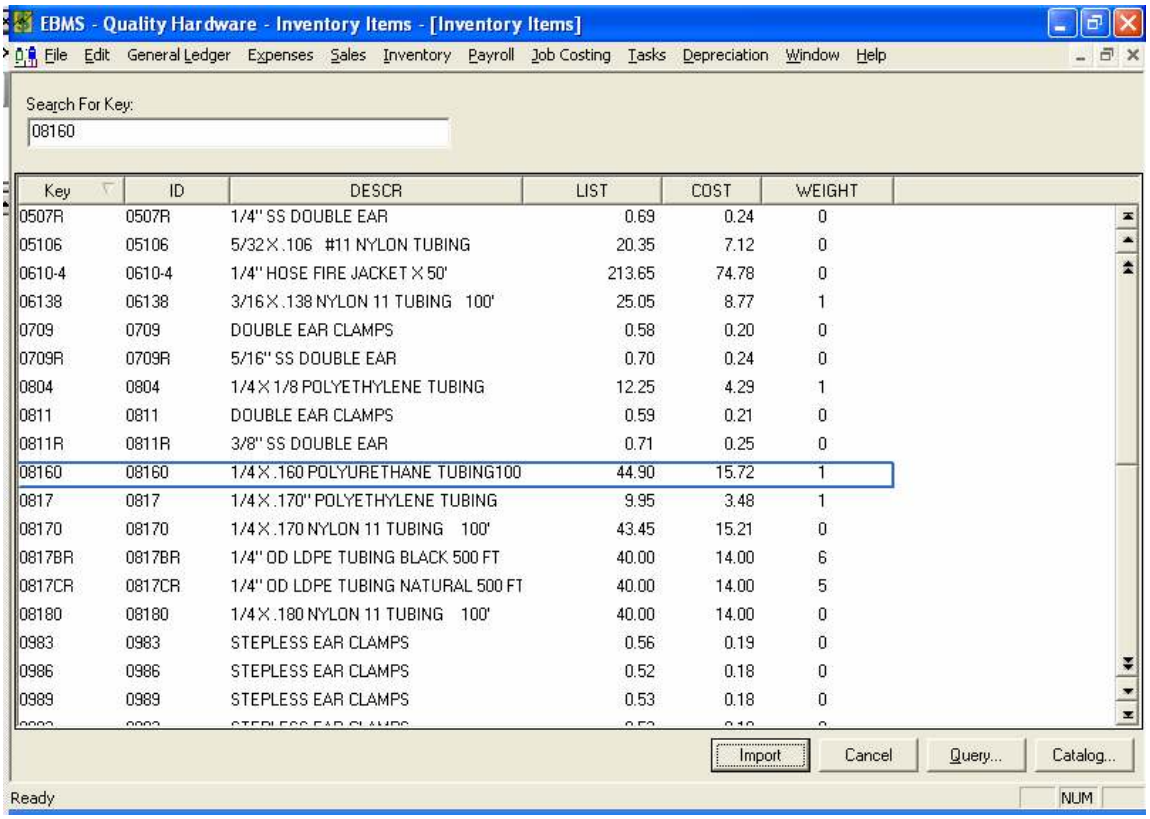
It is not recommended that vendor products be inserted into the EBMS inventory item database unless the products are purchased or sold by the user. Inventory items can be easily viewed and created at the time they are entered in a purchase order or sales invoice.

Complete the following steps to insert products from the vendor catalog into EBMS:

1. Select **Inventory > Inventory Items** from the EBMS menu and click on the **Catalog** button.
2. Select the desired catalog from the drop down menu as shown below.



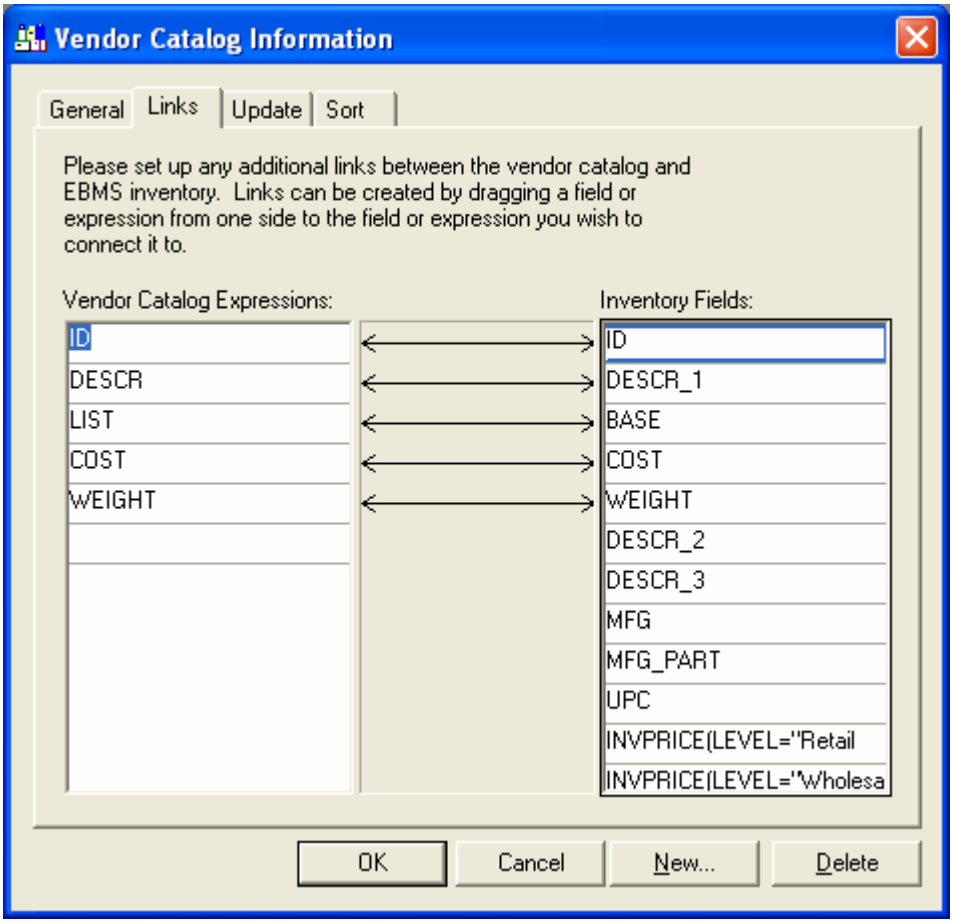
3. Find the desired inventory item and select the **Import** button as seen below.



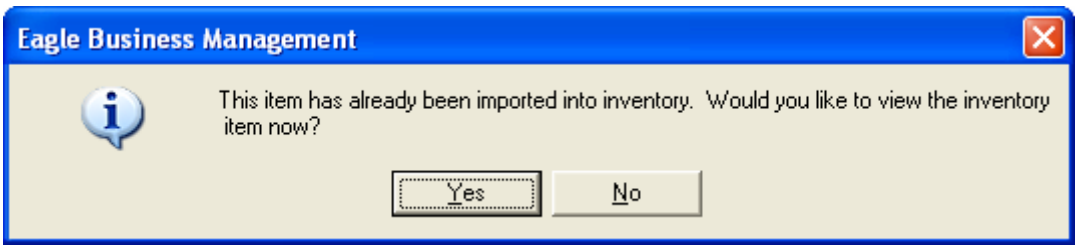
If the item is not in EBMS inventory the import will take you through the new inventory item wizard and the association in the **Links** tab of the catalog properties will determine what information is copied from the vendor's catalog file into EBMS when a new item is created.

For more information on adding a new inventory item, review the **Inventory>Inventory Items>Entering New Inventory Items** section in the main manual.

To see what links are set, go to **Inventory > Options > Vendor Catalogs > Properties** button **> Links** tab section as seen below.



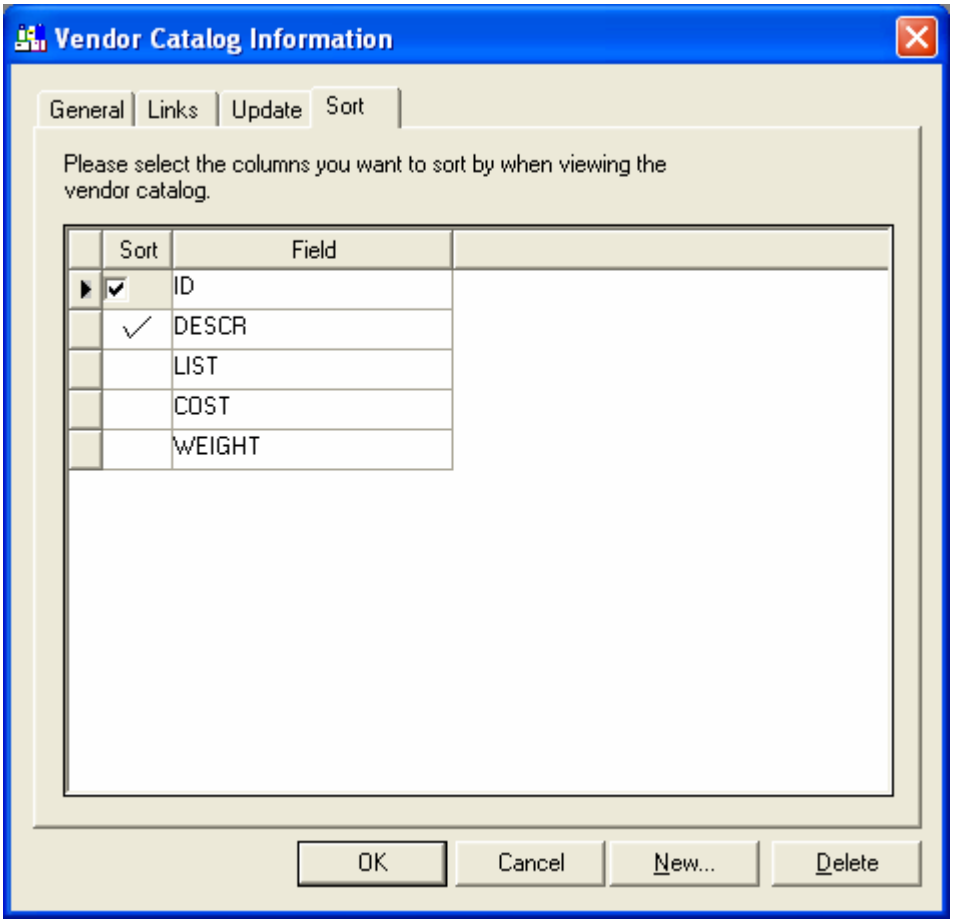
If the item is already in EBMS inventory you will get the following message.



Viewing and Sorting

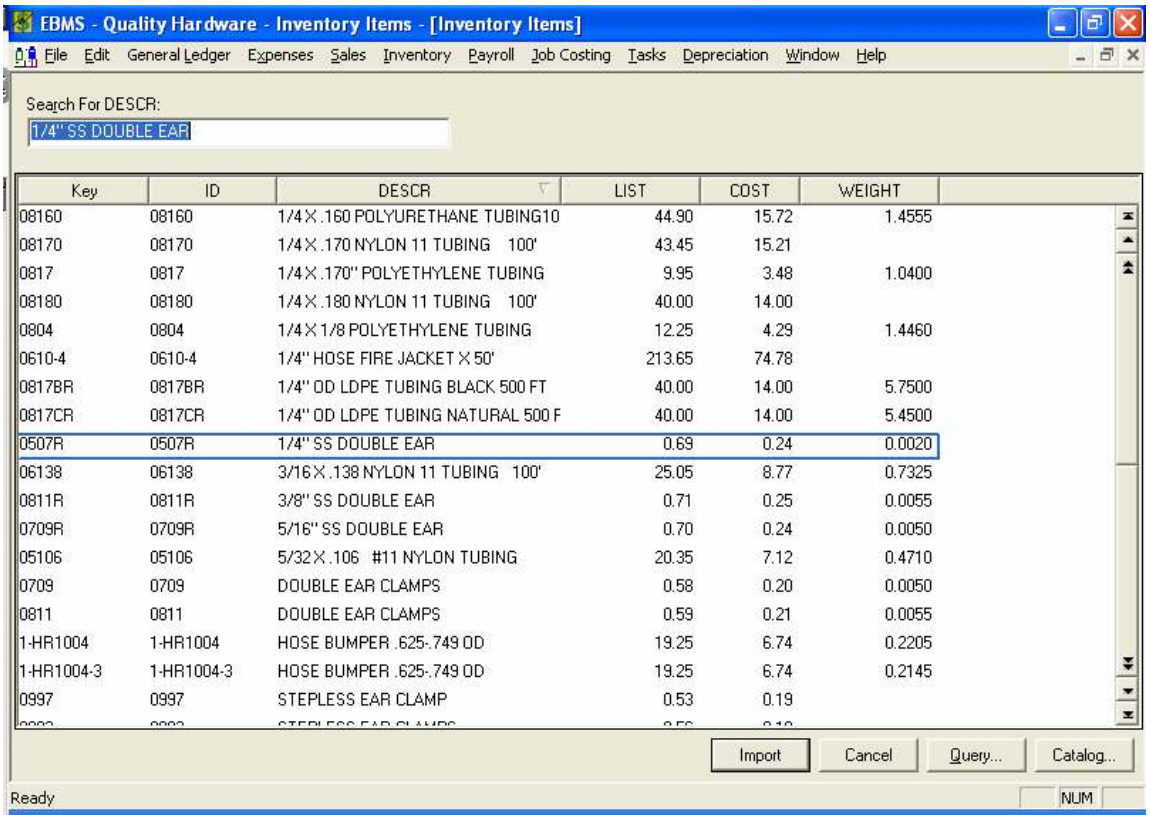
Finding items in a vendor catalog file is simplified with the Multiple Vendor Catalog module. The columns in a vendor catalog file that can be sorted are determined by the user.

To see what columns can be sorted go to **Inventory > Options > Vendor Catalogs > Properties** button **> Sort** tab as seen below.



To sort or to find an item in a vendor catalog open the vendor catalog by selecting **Inventory > Inventory Items** from the EBMS menu and select the desired catalog by clicking on the **Catalog** button.

Click on the title of the column in the vendor catalog that you want to sort or search. A triangle and a search box will appear for that column as seen below. (Example: The description field is being sorted.)


EBMS - Quality Hardware - Inventory Items - [Inventory Items]
File Edit General Ledger Expenses Sales Inventory Payroll Job Costing Tasks Depreciation Window Help
Search For DESCR:
1/4" SS DOUBLE EAR
Key ID DESCR LIST COST WEIGHT
08160 08160 1/4 X .160 POLYURETHANE TUBING10 44.90 15.72 1.4555
08170 08170 1/4 X .170 NYLON 11 TUBING 100' 43.45 15.21
0817 0817 1/4 X .170" POLYETHYLENE TUBING 9.95 3.48 1.0400
08180 08180 1/4 X .180 NYLON 11 TUBING 100' 40.00 14.00
0804 0804 1/4 X 1/8 POLYETHYLENE TUBING 12.25 4.29 1.4460
0610-4 0610-4 1/4" HOSE FIRE JACKET X 50' 213.65 74.78
0817BR 0817BR 1/4" OD LDPE TUBING BLACK 500 FT 40.00 14.00 5.7500
0817CR 0817CR 1/4" OD LDPE TUBING NATURAL 500 F 40.00 14.00 5.4500
0507R 0507R 1/4" SS DOUBLE EAR 0.69 0.24 0.0020
06138 06138 3/16 X .138 NYLON 11 TUBING 100' 25.05 8.77 0.7325
0811R 0811R 3/8" SS DOUBLE EAR 0.71 0.25 0.0055
0709R 0709R 5/16" SS DOUBLE EAR 0.70 0.24 0.0050
05106 05106 5/32 X .106 #11 NYLON TUBING 20.35 7.12 0.4710
0709 0709 DOUBLE EAR CLAMPS 0.58 0.20 0.0050
0811 0811 DOUBLE EAR CLAMPS 0.59 0.21 0.0055
1-HR1004 1-HR1004 HOSE BUMPER .625-.749 OD 19.25 6.74 0.2205
1-HR1004-3 1-HR1004-3 HOSE BUMPER .625-.749 OD 19.25 6.74 0.2145
0997 0997 STEPLESS EAR CLAMP 0.53 0.19
Import Cancel Query... Catalog...
Ready
NUM

Updating a Vendor Catalog

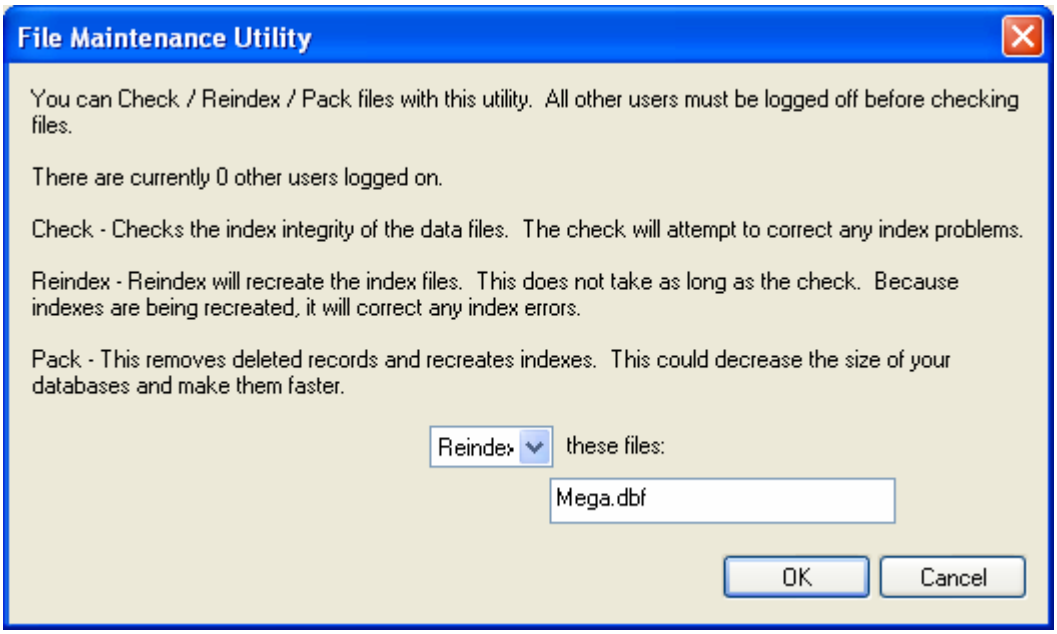
Loading an Updated Catalog

1. Convert the updated vendor catalog file into a Dbase or FoxPro compatible file if the file is not in the proper format. For more information on converting a file review the Creating a EBMS Compatible File Using MS Excel section.

2. **Save** the new file in the EBMS data directory and overwrite the old vendor catalog file. Select **File > Company > Advanced Tab** from the EBMS menu to view the current **Data Path**.

   Make sure the new data file's headings are exactly the same as the old database headings and make sure the file name is the same.

3. Before using the new Vendor Catalog, it must be reindexed. Go to **File>Utilities> Maintenance Utilities**. (Example below. The Mega.dbf file will be reindexed.) Select only the **File Maintenance Utility.** Click on the **Settings** button.

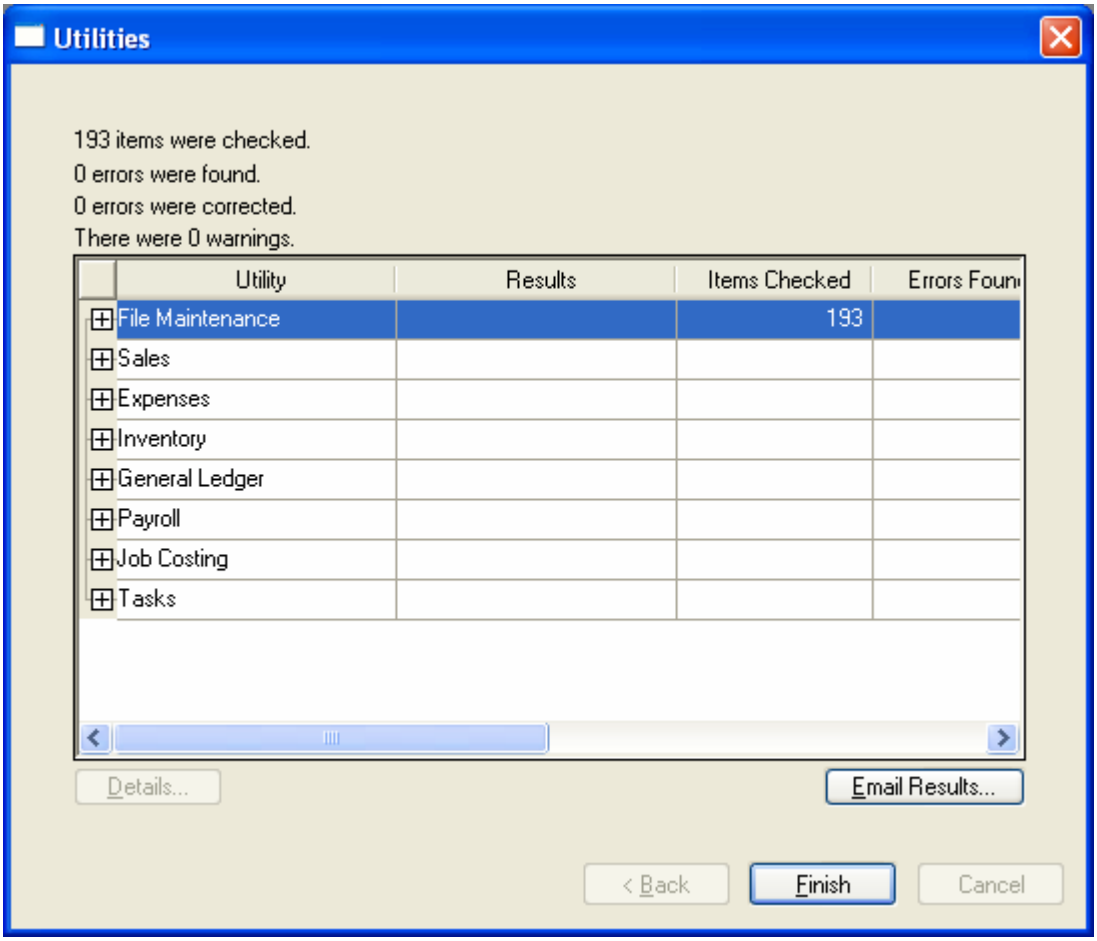


4. Enter the file name of the vendor catalog.

5. Select **OK**

6. Select **Next**

You should get the message below when the reindex is finished.



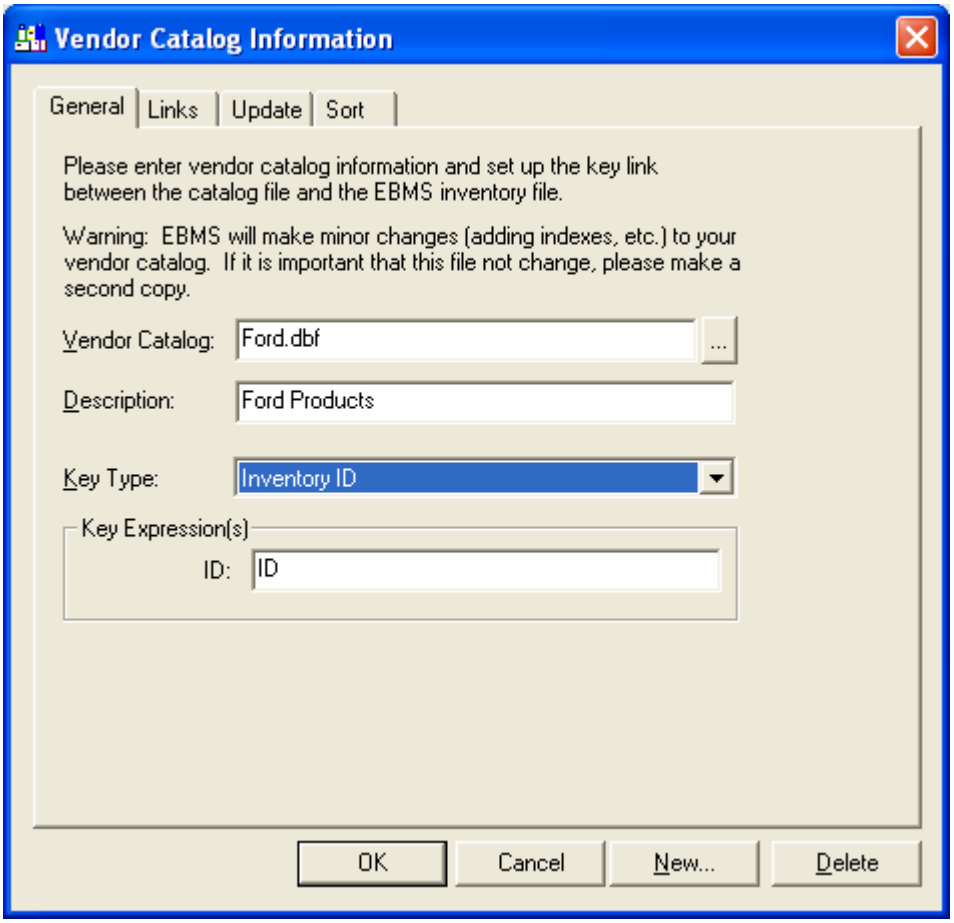
7. Select **Finish**

8. Go to **Inventory > Options >Vendor Catalogs > Properties** button **> Sort** tab and set the fields that need to be sorted. All the other properties of the vendor catalog should be the same as the old vendor catalog.

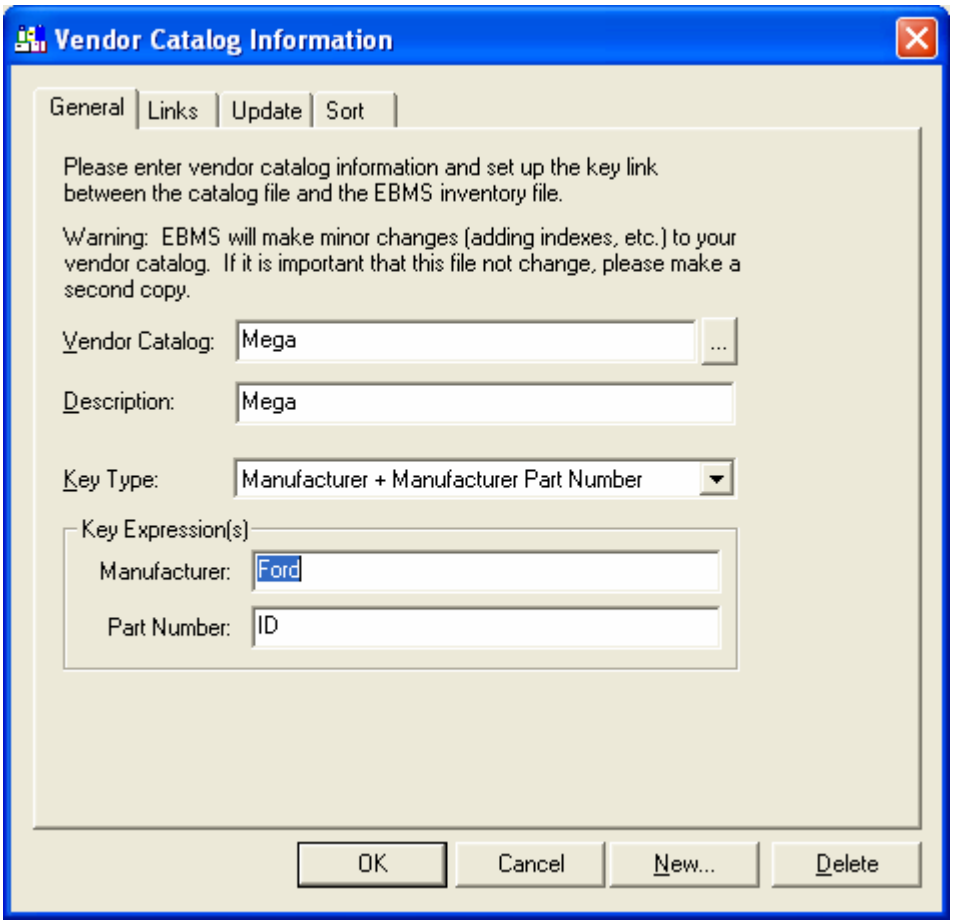
Updating prices and other information from the new file

Updating inventory items in EBMS from a vendor catalog is fast and simple once the correct parameters are set.

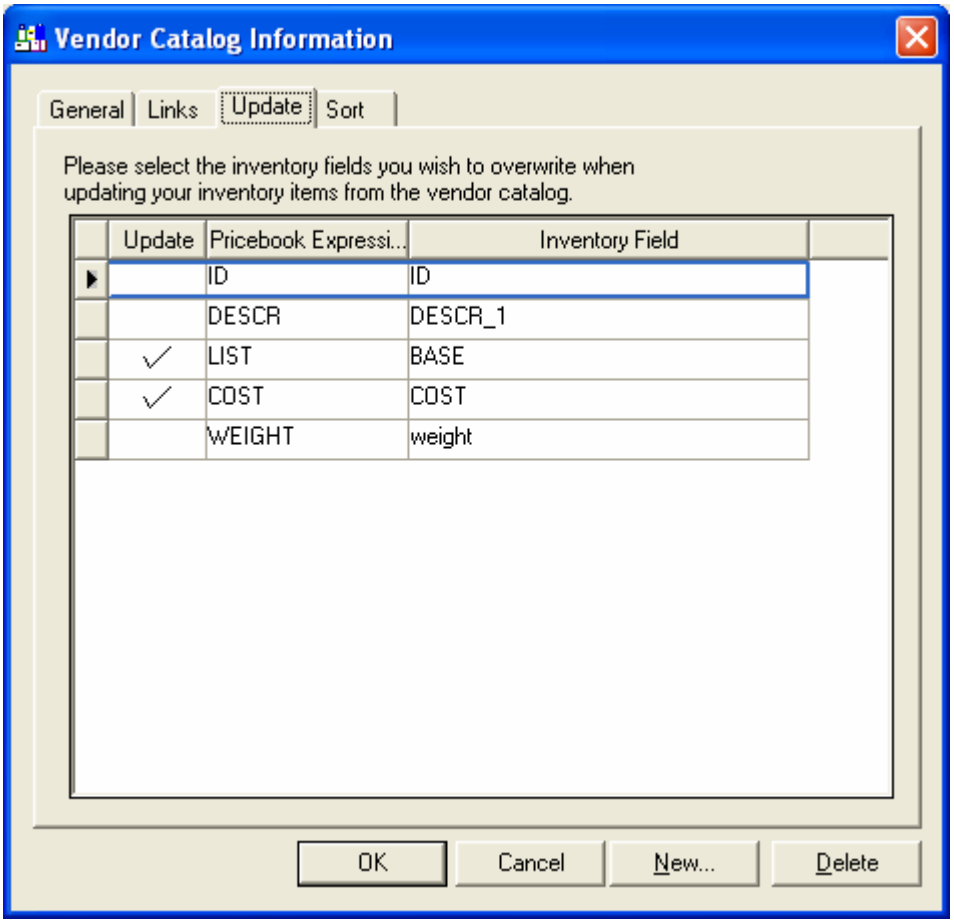
The updated inventory items are controlled by going to **Inventory > Options > Vendor Catalogs > Properties** button **> General** tab. The items that will be updated are the items that the **Key Type** Field matches the **Key Expression** in the vendor catalog. (Example #1 below: The **Inventory ID** of the inventory item in EBMS needs to match the field in the vendor price catalog called **ID**.)



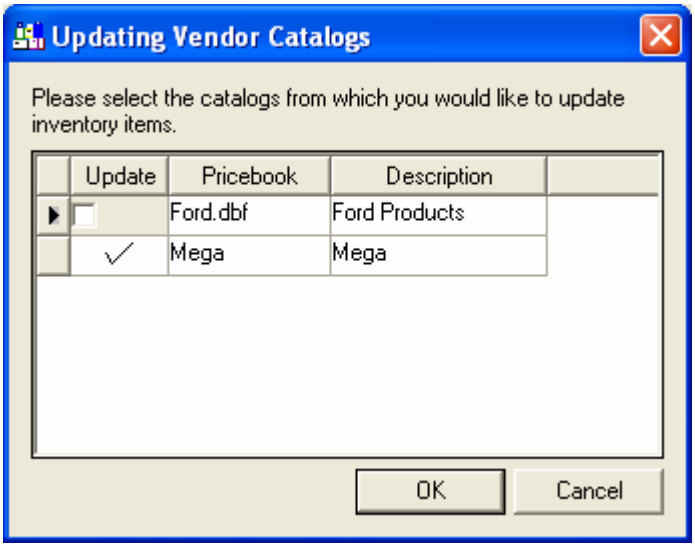
(Example #2 below: The **Manufacturer** field of the inventory item in EBMS needs to contain **Ford** and the **Manufacturer Part Number** field in EBMS needs to match the field in the vendor price catalog called **ID**.)



The fields to be updated in the Inventory item are controlled by going to **Inventory > Options > Vendor Catalogs > Properties** button **> Update** tab as seen below. (Example below: The fields Base Price and Cost will be updated in the EBMS inventory items.)

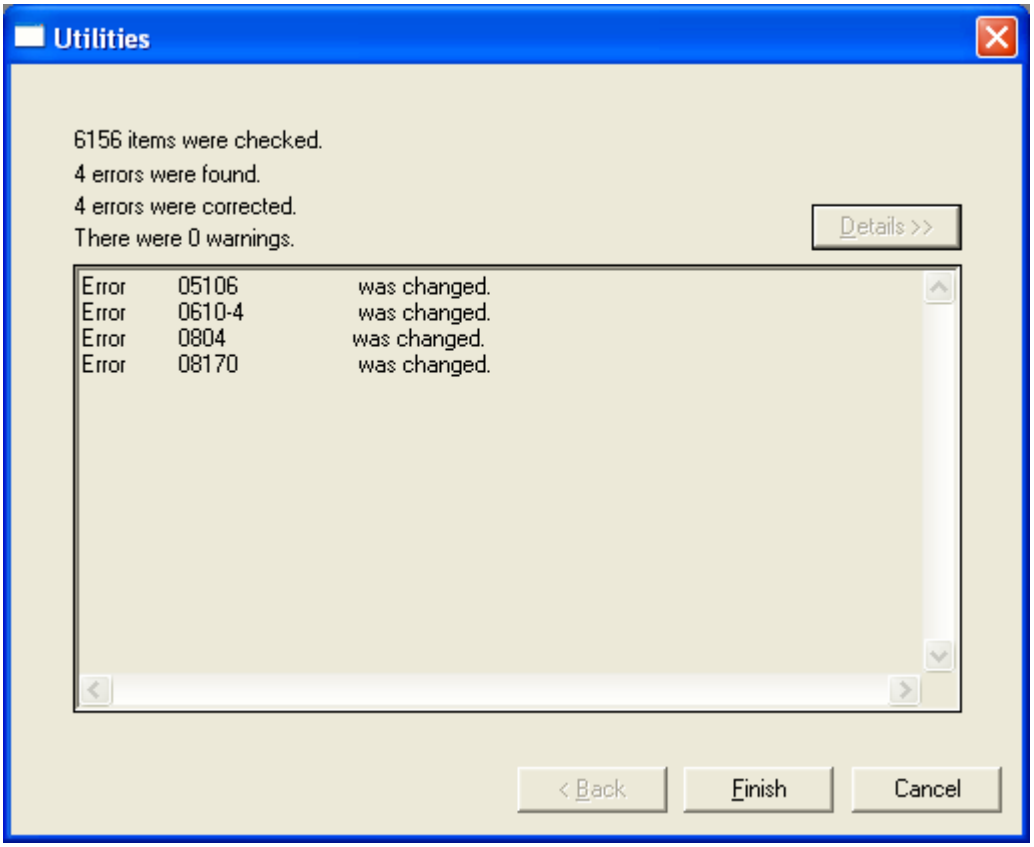


After the new vendor price catalog in saved into the EBMS data directory and the correct parameters are set up, Select **Inventory > Options > Vendor Catalogs > Update** button. The screen below will appear.



Select the Vendor Catalog that needs to be updated by putting a check mark in the **Update** field and select the **OK** button. (Example above: The EBMS inventory items that are linked to the Mega Vendor Catalog will be updated.)

After the utility is finished the following screen will appear with the number of items that have been changed. (Example below: Four EBMS inventory items were changed or updated from the new vendor price catalog.)



Select **Finish** to exit the update utility.

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