

Setting Up and Using Ace Catalog

You can use the Ace catalog to buy or sell items that you may not normally stock without the need to keep every product listed in your inventory.

Objectives

- Setting Up Ace Catalog
- Using Ace Catalog

Setting Up Ace Catalog

Set up your Ace catalog so that new items are added correctly.

From the main menu, select **Utilities, Integrations** and then **Ace Hardware Integration**.

Please note that you need to set up the Ace retailer information *before* configuring the catalog details. Instructions on how to do this can be found in the Help.

After that is completed, select **Catalog**.

The Ace catalog setup screen appears.

You can configure your catalog defaults *here* when any new items are added.

Fields marked with a red asterisk are mandatory.

Next, use *this* field to determine which store or stores will have access to the Ace catalog.

Decide whether to *always* use a default category for all items added.

Choose **Yes, always**.

Choose **No, only when not matched** if you want to use Ace's categories.

You can set the default category in *this* field.

Similarly, decide whether to always use a default defective policy for all items added from the Ace catalog.

Set the default defective policy *here*.

Use the **Price by Default** field to set how you want the item to be priced.

Prices can be set the same or different for multiple branches.

Enter the default location code for the items you add from the catalog *here*.

You can also add *tags* to easily identify the added items.

Finally, press **Save** to save your changes.

New items will be added accordingly.

Select **Actions** and then **Refresh Catalog Data**.

This will load the entire current catalog, and an alert will be sent when the process is completed.

Using Ace Catalog

After you have registered with Ace and refreshed your catalog, you can use it to buy and sell items and add items to *Products*.

From the main menu, select **Catalog** then **View Catalog**.

If you *only* have the Ace catalog, this field defaults to Ace.

If you have multiple catalogs, select the catalog from the drop-down menu.

Search for an item by its description or UPC.

Leave the box blank to view all items.

You can narrow your search based on category, manufacturer, or price range.

Tap **SEARCH** to view the items based on your search criteria.

The *Catalog: Product Listing* page displays all related items.

A green check in the **My Store** column indicates the item is already available in *Products*.

You can narrow your search by selecting the relevant category, manufacturer, price range, and whether the item is stocked at your store.

Tap **REFINE RESULTS**.

Select the items by checking the boxes next to them.

The Export to Excel, View Items, Add to Product, and Add to Cart buttons are now enabled.

Use the **Export to Excel** button to export the details of selected items to an excel sheet.

Tap the **View Items** button to view more details about selected items.

Here you can see the general information as well as details about purchasing the item.

In the **GENERAL** tab, you can see the retail price of the item received from Ace.

Tap **View Pricing Options** to see the item's alternate price from Ace.

Here, you can see if the item is available or discontinued.

My Store Item number shows the SKU of the selected item in *Products*. Tap the link to view the store's stock.

You can also view the item's manufacturer details, additional information, and item specifications.

The **Buying** tab displays the purchasing information of the item, such as cost, order multiple, order multiple cost, case pack quantity, and vendor information.

Back in the view catalog page, tap **Add to Product** button to add the item(s) to *Products*.

In the **Add New Products** pop up, review the details, and make any necessary changes.

Tap **Add**.

Select the **Add to Cart** button to add the item(s) to your cart.

Set the quantity of the item by using the *plus* and *minus* buttons and then select *this* icon.

Select **View Cart** to view the items added to the cart.

Based on your roles and permissions, you will have the option to either *sell* or *purchase* the selected item.

If the order type is a *sale*, confirm the items are correct and then select **Finalize at POS** to complete the transaction.

If you want to create a purchase order, change the toggle from Sale to Purchase and then press **Add to PO**. Decide whether this is a new PO or if you want to append these items to an existing PO. Finally, tap **Save**.

You will receive a message confirming a PO has been created or appended.

Recap

Use the Ace catalog to easily order special items and sell products and create any related purchase orders. For more information, you can always refer to the help articles, videos, and guided learning.

In this course, we showed you how to set up and use the Ace catalog.

The contents of this document are for informational purposes only and are subject to change without notice. Epicor Software Corporation makes no guarantee, representations or warranties with regard to the enclosed information and specifically disclaims, to the full extent of the law, any applicable implied warranties, such as fitness for a particular purpose, merchantability, satisfactory quality or reasonable skill and care. This document and its contents, including the viewpoints, dates and functional content expressed herein are believed to be accurate as of its date of publication. The usage of any Epicor software shall be pursuant to the applicable end user license agreement and the performance of any consulting services by Epicor personnel shall be pursuant to applicable standard services terms and conditions. Usage of the solution(s) described in this document with other Epicor software or third party products may require the purchase of licenses for such other products. Epicor, the Epicor logo, and are trademarks of Epicor Software Corporation, registered in the United States and other countries. All other marks are owned by their respective owners. Copyright © 2021 Epicor Software Corporation. All rights reserved.

About Epicor

Epicor Software Corporation drives business growth. We provide flexible, industry-specific software that is designed around the needs of our manufacturing, distribution, retail, and service industry customers. More than 40 years of experience with our customers' unique business processes and operational requirements is built into every solution—in the cloud, hosted, or on premises. With a deep understanding of your industry, Epicor solutions spur growth while managing complexity. The result is powerful solutions that free your resources so you can grow your business. For more information, [connect with Epicor](#) or visit www.epicor.com.

EPICOR

Corporate Office

804 Las Cimas Parkway
Austin, TX 78746

USA

Toll Free: +1.888.448.2636

Direct: +1.512.328.2300

Fax: +1.512.278.5590

Latin America and Caribbean

Blvd. Antonio L. Rodriguez #1882 Int. 104

Plaza Central, Col. Santa Maria

Monterrey, Nuevo Leon, CP 64650

Mexico

Phone: +52.81.1551.7100

Fax: +52.81.1551.7117

Europe, Middle East and Africa

No. 1 The Arena

Downshire Way

Bracknell, Berkshire RG12 1PU

United Kingdom

Phone: +44.1344.468468

Fax: +44.1344.468010

Asia

238A Thomson Road #23-06

Novena Square Tower A

Singapore 307684

Singapore

Phone: +65.6333.8121

Fax: +65.6333.8131

Australia and New Zealand

Suite 2 Level 8,

100 Pacific Highway

North Sydney, NSW 2060

Australia

Phone: +61.2.9927.6200

Fax: +61.2.9927.6298