



11 A budget manager's guide to using catalogues

There are three buyer catalogue groups within Budget Manager. These are:

- **Public catalogue** - all organisations have access to this catalogue. When an organisation is created, the public catalogue is automatically assigned to it.
- **Local authority catalogue** – a local authority catalogue is created automatically when an organisation is set-up. The local authority catalogue can be set as a private or shared public catalogue.
- **Individual's private catalogue** – this type of buyer catalogue is created exclusively for an individual's use and can contain specific products tailored to an individual.

There are 3 possible ways to navigate to the Catalogue page:

- From the Schedule Order/Draft folder summary screen, using the Create Order button.
- From the Purchase Order Draft folder summary screen, using the Create Order button.
- By selecting the Catalogue link in the bottom left navigation panel.

In all cases the catalogue selection default page will be displayed.

You will need to select the Personal Budget Manager, Individual and Buyer Catalogue Group filters when there is more than one Personal Budget Manager and one Personal Budget Account available to you.

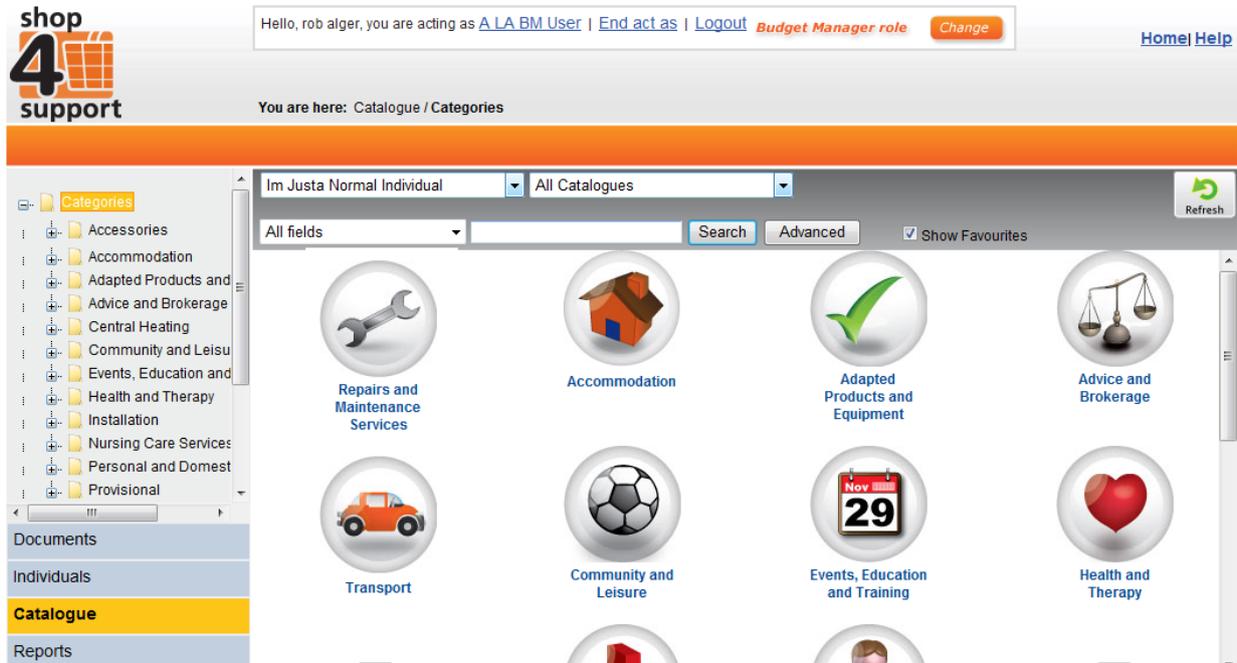
The screen below shows the filters you will use to select a catalogue.

Personal budget manager:	Ima Budget Manager
Individual:	Justan Individual of Hesselink
Buyer catalogue group:	- Select Buyer catalogue group -

Fig. 1 Catalogue Selection Filters

The Catalogue summary screen shown below displays images representing the different shopping categories available to you, such as 'Accommodation.' Each of these corresponds to the shopping categories listed in the left hand panel of the screen.

You can use the filters at the top of the page to control what your catalogue displays.



If you have ticked the Show Favourites selection box (at the top of the screen) the catalogue will only display products and services that have been selected as favourites within an individual catalogue.

Any 'favourites' will already have been selected using an individual's Personal details folder, as shown below.

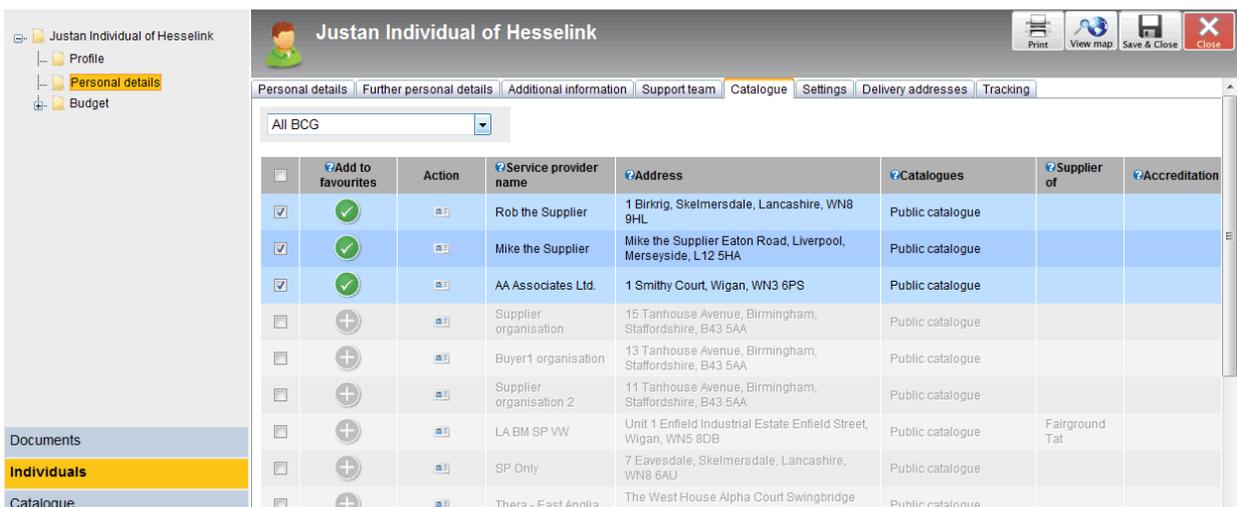
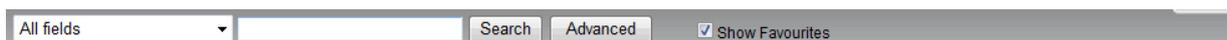


Fig. 3 Catalogue Favorites View in Personal Details

To make looking for products and services easier, you can include search criteria within your filtered catalogue, as well as searching for specific details such as a service provider or a product code.



If you wish to see all the items you have selected, you can visit the basket summary page by clicking on the Basket folder at the bottom of the Categories panel on the left of your screen (show below).

If you are unable to see the Basket folder, this may be because you do not have permission, as a particular user, to view it.

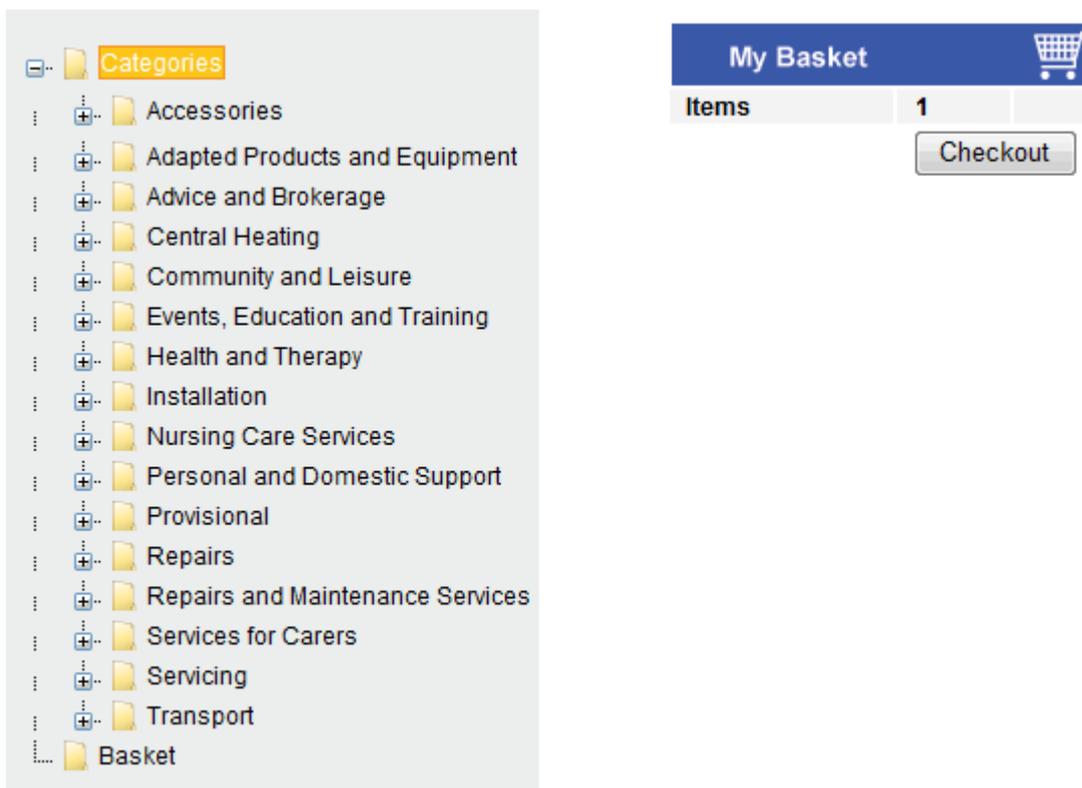
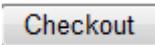


Fig. 4 My Basket Link

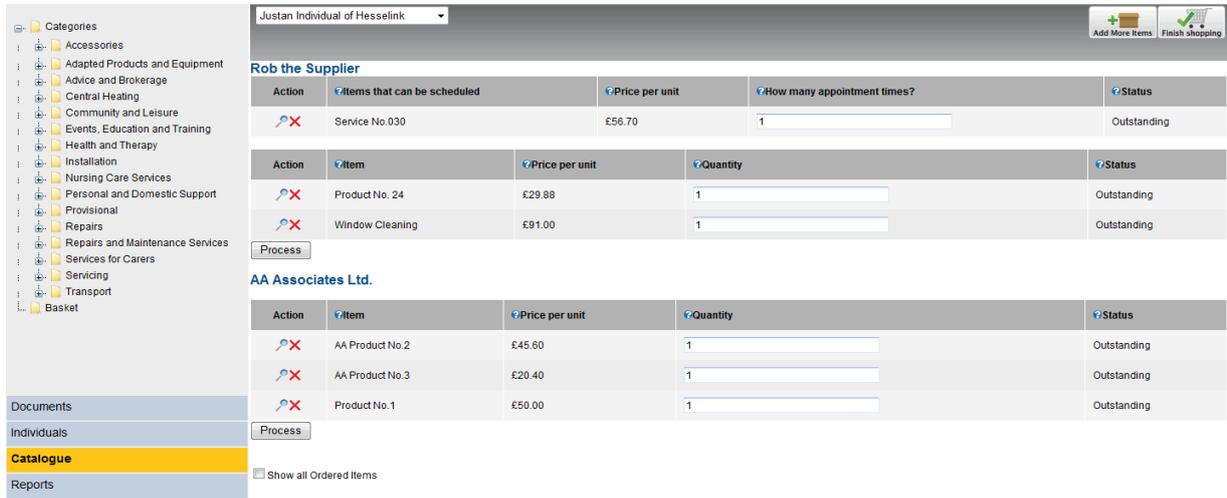
Products and services can be selected from the catalogue, and then added to the basket using the 'Add to Basket' action button 

When you have completed your shopping, click on the Checkout  button to process your order.

If you are unable to see the Add to Basket action button, this may be because you do not have permission, as a particular user, to view it. This may be because you do not have permission to create orders.

Using the product details page

If you'd like to find out more about the product or service you have selected, click on the magnifying glass icon . This can be found in the action column next to an item in the main catalogue screen shown below.



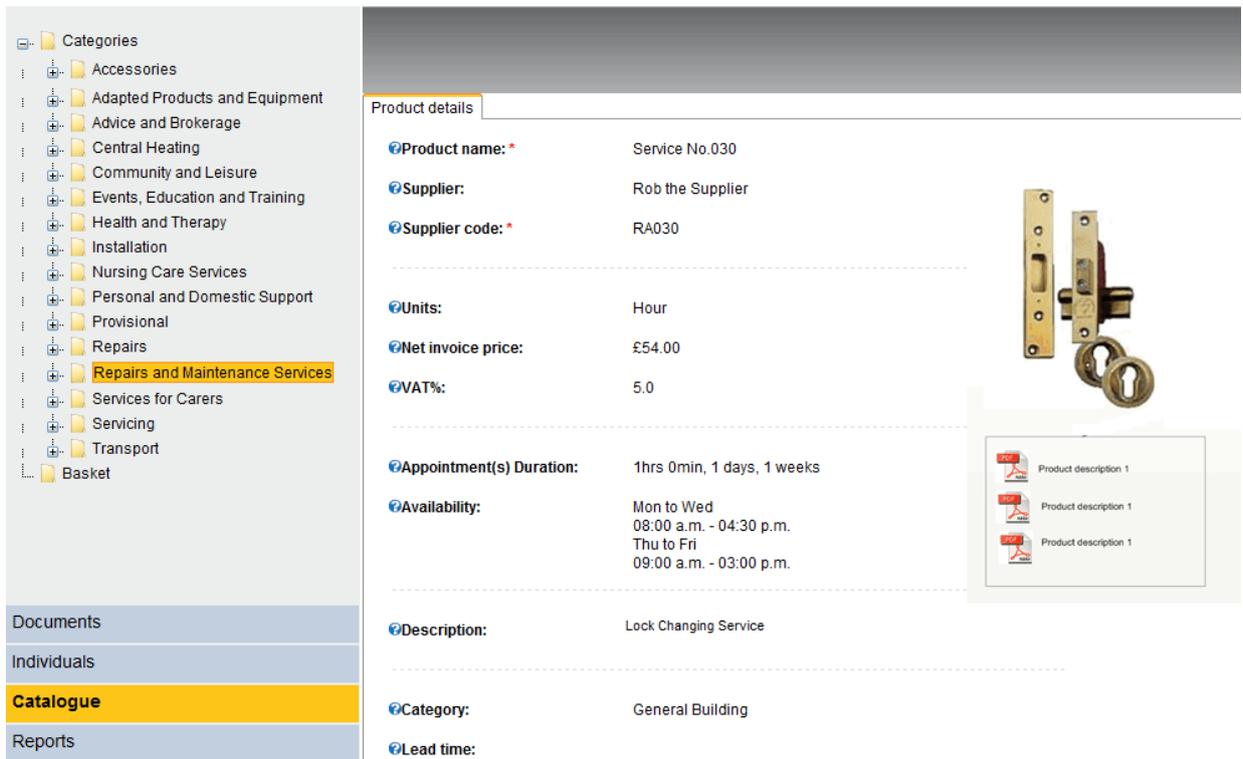
The screenshot shows the 'Order Process Screen' with a sidebar on the left containing a 'Categories' tree. The main area displays a list of items from two suppliers: 'Rob the Supplier' and 'AA Associates Ltd.'. Each item has a magnifying glass icon in the 'Action' column, which is used to view product details.

Rob the Supplier				
Action	Items that can be scheduled	Price per unit	How many appointment times?	Status
	Service No.030	£56.70	1	Outstanding

AA Associates Ltd.				
Action	Item	Price per unit	Quantity	Status
	Product No. 24	£29.88	1	Outstanding
	Window Cleaning	£91.00	1	Outstanding
	AA Product No.2	£45.60	1	Outstanding
	AA Product No.3	£20.40	1	Outstanding
	Product No.1	£50.00	1	Outstanding

Fig. 6 Order Process Screen

Clicking on this will direct you to a Product details page like that shown below, which will give you more information about an item, such as price, description, and availability.



The screenshot shows the 'Product details' page for 'Service No.030'. The left sidebar is the same as in the previous screenshot. The main content area displays various product attributes and a list of descriptions.

Product name:	Service No.030
Supplier:	Rob the Supplier
Supplier code:	RA030
Units:	Hour
Net invoice price:	£54.00
VAT%:	5.0
Appointment(s) Duration:	1hrs 0min, 1 days, 1 weeks
Availability:	Mon to Wed 08:00 a.m. - 04:30 p.m. Thu to Fri 09:00 a.m. - 03:00 p.m.
Description:	Lock Changing Service
Category:	General Building
Lead time:	

On the right side of the page, there is an image of a brass door handle and a set of keys. Below the image is a list of three 'Product description 1' documents, each with a red document icon.

Processing an order

Once you have chosen your items and clicked into your basket, you can process your orders by individual service providers. Here, you can also select the quantity you would like of each product or service, as shown below.

Rob the Supplier

Action	Items that can be scheduled	Price per unit	How many appointment times?	Status
	Service No.030	£56.70	2	Outstanding

Action	Item	Price per unit	Quantity	Status
	Product No. 24	£29.88	1	Outstanding
	Window Cleaning	£91.00	4	Outstanding

Fig.7 Process an Order

Once you have indicated the quantities you would like, click on the Process button . This will direct you to the first step of the Order Wizard.

Delivery dates & times



Provider name: Rob the Supplier

Action	Item name	Unit quantity	Unit of measure	Unit price	Total VAT	Date/times available	Requested date	Appointment times	Total units	Total gross
	Service No.030	1	Hour	£56.70	5.0	Mon to Wed 08:00 a.m. - 04:30 p.m. Thu to Fri 09:00 a.m. - 03:00 p.m.				£0.00
	Service No.030	1	Hour	£56.70	5.0	Mon to Wed 08:00 a.m. - 04:30 p.m. Thu to Fri 09:00 a.m. - 03:00 p.m.				£0.00
	Window Cleaning	1	Each	£91.00	0.0	N/A		-	4	£364.00
	Product No. 24	1	Each	£29.88	20.0	N/A		-	1	£29.88

<input type="button" value="Recalculate"/>	
Total for this order Total (gross)	£0.00
Scheduled totals Total (gross)	£0.00

Fig. 8 Step 1 Order Wizard

To set dates, times and repeating patterns (for schedule orders) use the calendar icon action button shown below. Products do not require a repeating pattern, only a delivery date is required.

shop 4 support Dates and times

Start date
Start date 09/06/2011

Appointment times

Start time: 01 : 00 @ am pm

End time: 01 : 00 @ am pm

Duration: 00 : 00

All day(24h)

Show repeating options

Fig. 9 Dates & Times for a Purchase Order

Schedule orders can have a repeating pattern set to automatically generate purchase orders at specified dates and times over a set period of time. Simply enter the information in to the relevant fields and press OK, as shown below.

shop 4 support Dates and times

Start date: 09/06/2011

Appointment times:
 Start time: 09 : 00 am pm
 End time: 10 : 00 am pm
 Duration: 01 : 00
 All day(24h)

Show repeating options

Repeating pattern:
 Repeat every 1 week(s) on:
 Monday
 Tuesday
 Wednesday
 Thursday
 Friday
 Saturday
 Sunday

End date:
 End date: 16/06/2011
 End after 10 weeks

Ok Close

Fig. 10 Dates, Times and Repeating Options for Schedule Orders

Once you have done this, you will be shown a summary of the different services you have chosen, as

shown below. If you are happy with the information click the Next button  to be directed to the next stage of the Order Wizard (for more information, please refer to guide 02 A budget manager's guide to creating a purchase order).

Delivery dates & times



Provider name: Rob the Supplier

Action	Item name	Unit quantity	Unit of measure	Unit price	Total VAT	Date/times available	Requested date	Appointment times	Total units	Total gross
	Service No.030	1	Hour	£56.70	5.0	Mon to Wed 08:00 a.m. - 04:30 p.m. Thu to Fri 09:00 a.m. - 03:00 p.m.	09/06/2011	08:00 a.m. - 09:00 a.m.	50	£2,835.00
	Service No.030	1	Hour	£56.70	5.0	Mon to Wed 08:00 a.m. - 04:30 p.m. Thu to Fri 09:00 a.m. - 03:00 p.m.	09/06/2011	09:00 a.m. - 10:00 a.m.	20	£1,134.00
	Window Cleaning	1	Each	£91.00	0.0	N/A	09/06/2011	-	4	£364.00
	Product No. 24	1	Each	£29.88	20.0	N/A	16/06/2011	-	1	£29.88

Recalculate	
Total for this order Total (gross)	£393.88
Scheduled totals Total (gross)	£3,969.00

Fig. 11 Completed Order

Once you have completed the purchase order process, you will see the following message, enabling you to continue or finish shopping:

You have now processed all the items in your basket.
To continue shopping 'Add' further items to your basket or if you have finished shopping select 'Finish Shopping'.

