

B2B - Setting up Item Categories & Customer Categories

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Here are the instructions for setting up Item Categories & Customer categories for use in the Order Time B2B Portal.

- **How to get to the Categories**

- Admin > Profile Lists > Categories

- **Records**

- This list shows you the current categories and the nesting for child categories
 - Example
 - *Valves*
 - *Ball*
 - *Butterfly*
 - *Check*
 - *Diaphragm*
 - *Gate*
 - *Parallel Slide*

- **Creating a Record**

- Name
 - Enter the name for your category
- Parent
 - Choose the parent category if you are nesting a child category
- Active
 - Checked - Category is active
 - Unchecked - Sets Category to inactive

- **MAKE SURE YOU HIT SAVE ON THE TOP-RIGHT**

- You can always return to these settings by going to Admin > Profile Lists > Categories

• Add the Category Drop-Down to Customers

- Head to Admin > Page Layouts
- Select Record Type: Entities
- Select Layout Type: Editors
- Click on the Edit button for Customer
- We suggest dragging the Category Drop-Down from Widgets into the Defaults Tab shown below

The screenshot shows the 'Edit Editor Page for Customer' interface. The 'Defaults' tab is selected, displaying various configuration fields for a customer profile. The 'Category' field is highlighted in the left sidebar. The interface includes sections for General, Other, Primary Contact, Address, Payment, Notes, and Custom. The 'Category' field is located in the 'Custom' section.

- Hit Save

• Add the Category Drop-Down to Items

- Head to Admin > Page Layouts
- Select Record Type: Entities
- Select Layout Type: Editors
- Click on the Edit button for Items
- We suggest dragging the Category Drop-Down from Widgets into the General Tab shown below

The screenshot shows the 'Edit Editor Page for Item' interface. The 'General' tab is selected, displaying various configuration fields for an item profile. The 'Category' field is highlighted in the left sidebar. The interface includes sections for General, Purchasing, Notes, and Custom. The 'Category' field is located in the 'Custom' section.

- Hit Save

• Importing Categories

- You can import categories the same way you import any data into Order Time.
- Head to Admin >> Import >> Click on the button that says New Import Job

- **You can import the Customer Category**



Admin > Import > Import

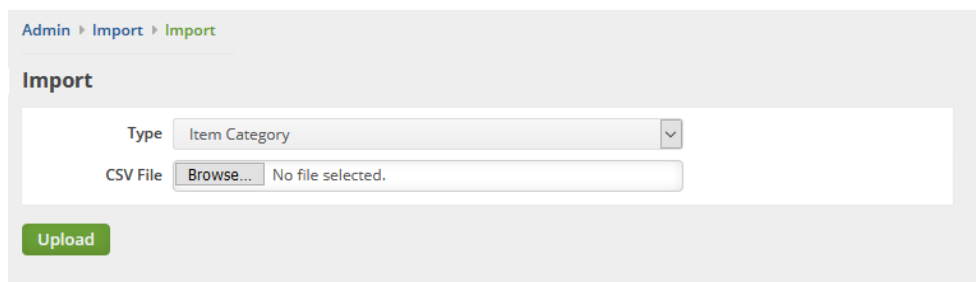
Import

Type

CSV File No file selected.

- When importing customer categories you are importing which categories that you'd like to limit them to.
- When the portal setting (Only show products in customer categories) is checked, they will only see the categories they are attached to.
- To learn more, refer to the section above "Add the Category Drop-Down to Customers"

- **You can import the Item Category**



Admin > Import > Import

Import

Type

CSV File No file selected.

- When importing item categories make sure you import the parent categories first.
- If the parent category is something like Cleaning Supplies, you'd upload those first.
- Then upload the child categories such as Floor Cleaners, Windows and Glass Cleaners, etc.

- **TO APPLY ALL OF THESE CHANGES YOU MUST REFRESH YOUR PORTAL**
 - To do this go to Admin > B2B Customer Portals > Click Refresh Portal (It's below the Configure & Deactivate Buttons)
- Next Step, **[Setting up Contacts with Portal Access](#)**

[Return to the B2B Portal Guide](#)