B2B - Setting up Item Categories & Customer Categories

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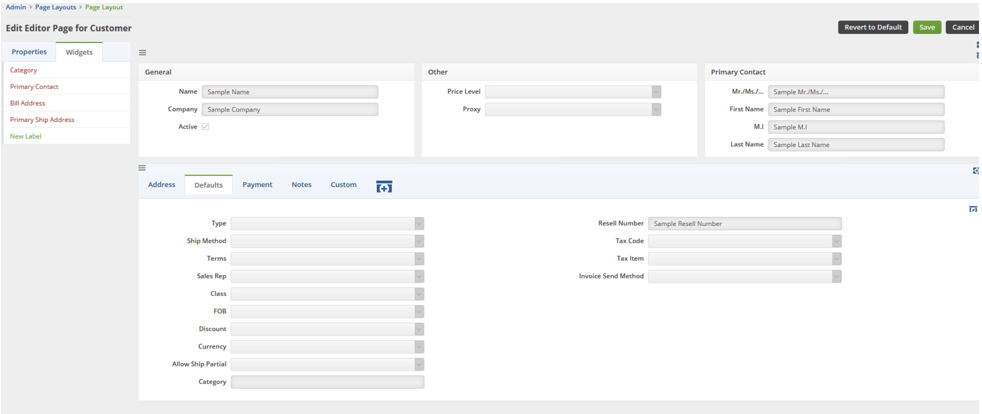
Here are the instructions for setting up Item Categories & Customer categories for use in the Order Time B2B Portal.

- ## 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**

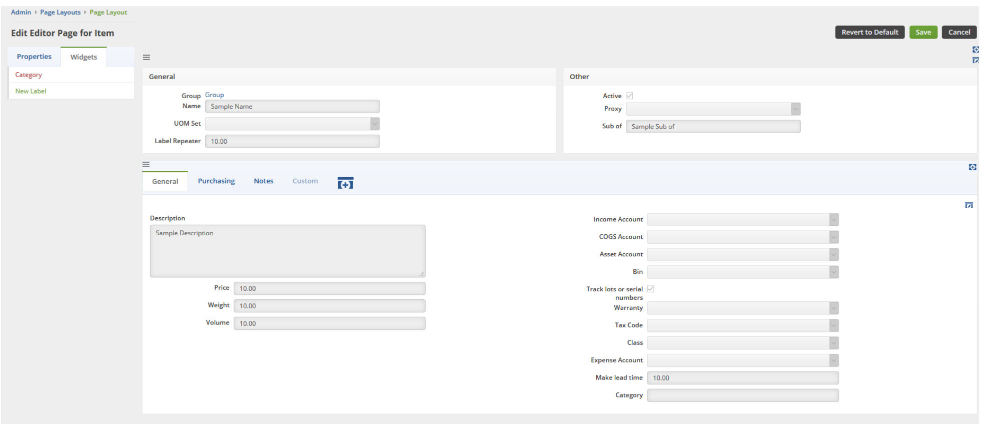
- You can always return to these settings by going to Admin > Profile Lists > Categories

- ## 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



  - 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



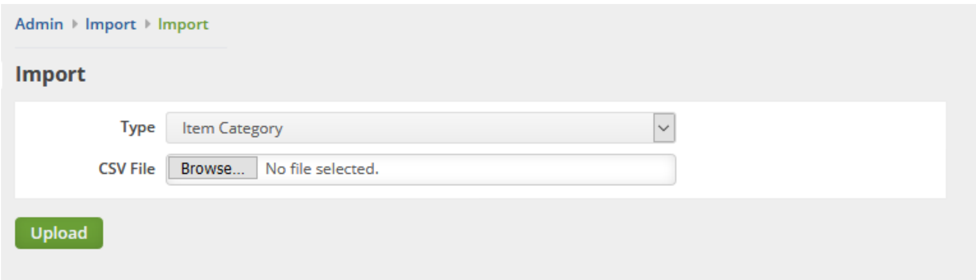
  - Hit Save

- ## 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

        - 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



        - 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