

WEBINAR WEDNESDAY

Snaptracker: Part 01 – Creating a Basic Catalog
for Stock Inventory



AGENDA

- ▶ Purpose and Benefit of the Catalog
- ▶ Basic structure and how to create a stock catalog
- ▶ Q & A

- ▶ Catalogs provide a professional way to present clients with their stock inventory
- ▶ With catalogs you can restrict the content your end user views
- ▶ It helps to organize the product in a meaningful way for your end user and internal staff (i.e.: managerial catalog vs a standard catalog)
- ▶ They can be customized in a number of different ways
- ▶ It's about reducing the amount of short service calls between your clients and your customer reps or account managers
- ▶ People often need things last min, and having the ability to place an order quickly throughout the day or after hours is definitely a value add
- ▶ Provides clients with online access and the ability to order product directly creates – ease of use

THE BENEFITS OF USING CATALOGS



[Home](#) | [My Profile](#) | [Help](#) | [Logout](#)

POWERED BY 

Onsite Solutions
 Welcome SYSTEM MANAGER

Cart : Cart Name: Goss here (Reserved)
 Items in Cart : 15
 Reserve No. : 108
 Sub-Total : \$0.00
[Go to Cart](#)

BROWSE FOR...

- ☒ Sample Catalog
 - Sample Meeting Area
 - Sample Panel Building
 - Sample Task Chair
 - ☐ Steelcase
 - ☐ Knoll
 - ☐ Allsteel
 - ☐ Herman Miller
 - ☐ Haworth
 - ☐ Tekmon
- ☐ Sample Stock Catalog

Request Services
 QUICK SEARCH
 Inquiry

- Quick Search
- Product Picture Search
- Product Catalogs
- Item Search
- Location Contents
- Miscellaneous Search
- Item Transaction History
- Reservation
- Work Orders

 My Account
 Accounting
 Movements
 PURA Processing
 Work Orders
 Reports and Analysis
 Setup
 Utilities

QUICK SEARCH
 REVIEW REQUESTS
 REQUESTS

Sample Catalog

[Home](#) > [Inquiry](#) > [Product Catalog](#)

Sample Meeting Area

SUMMARY
 PRODUCTS USED
 FEATURES
 RESOURCES

GLEEM
 Experience the staying power of classic design paired with keen, modern interiors. The Gleem Gusst Collection ushers in elegance and grace with scale and proportion for today's work environments. Gleem's proven steam bending technique and handcrafted mortise and tenon construction create a long lasting, superior chair.

JOT
 Discover the perfect table collection to go anywhere. Jot offers a materials mix to complement a diverse range of interiors from ultra modern to classic. Its metal base supports top in veneer. Scaled for a perfect fit, Jot makes a great first impression front and center or corner-tucked for convenient storage. Jot's UV Advantage finish features a crystal clear topcoat developed for durability in high traffic areas with anti-microbial protection.

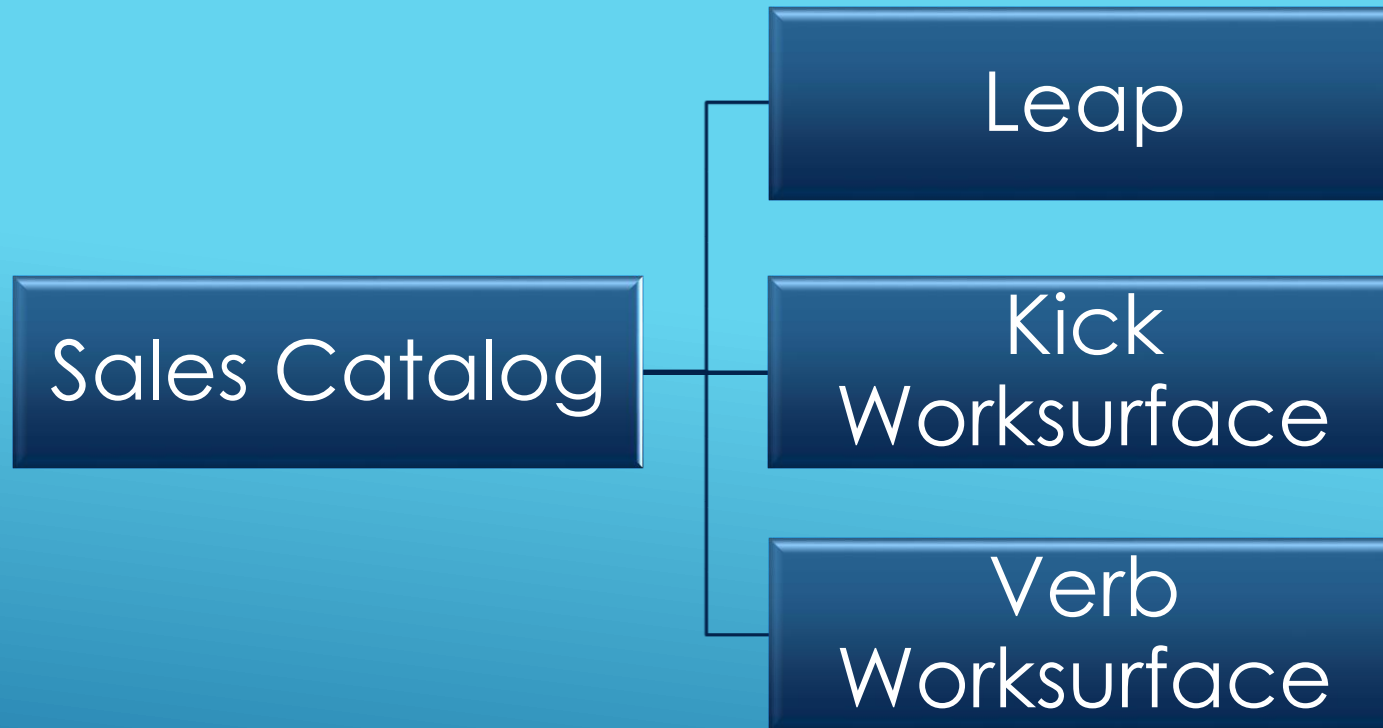


Catalog No:	Version:	Unit Price:	\$1,500.00
Standard:	MPL0001	Discount %:	10.00
Qty Available:	2(2)	Price:	\$1,350.00

THINGS TO KNOW ABOUT CREATING CATALOGS

- When creating catalogs the level of HTML detail is completely optional
- You can determine what information is present in the catalogs (i.e.: pricing)
- Its important to plan the hierarchical structure of the catalog first

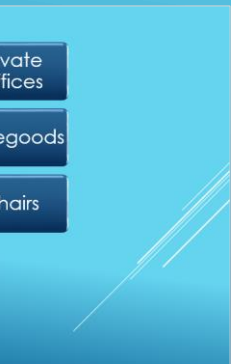
SAMPLE OF HOW TO ORGANIZE A CATALOG



- Before you begin determine the structure of your catalog
- How many layers will be added to the search tree
- What categories are important to your customer



EXAMPLE 02



WHERE DO YOU SET THE TIER?

► In the Catalog main page is where you can determine how many tiers or layers the catalog will have

Select a Customer

Z - BAR001 - Barker Importers Demo Customer

Select a Catalog : Sample Catalog Create Catalog

Product Catalog Information

Catalog Name :	
Category :	Sample Catalog
Label :	<span style="font-weight: bold; font-size: 12px; color: #08
Marketing Text :	
Display Seq. :	1 Show Price Range: ☒ Yes ☐ No
Eligible for Additional Charges :	☐ Yes ☒ No Specified Navigations Only: No
Enabled :	☒ Yes ☐ No

Create at Same Level | Create a level below | Delete | Update Preview

Catalog Access

Select a Customer
Z - BAR001 - Barker Importers Demo Customer

Home > User Setup > Catalog Access

required fields

Menu Access Customer Access Building Access **Catalog Access** Address Access Region Access Resource Area Permissions Service Form Permissions

Select a User: marcin - Marcin Ortel

Enter a User: marcin Get Record | Copy To

☒ New Catalogs Update

All	Catalog Name	Marketing Text
☐		
☒	Sample Catalog	
☒	Sample Stock Catalog	Sample Stock Catalog

Reset | Update

- At the User level you can assign which catalog a specific individual will have access to

ASSIGNING USER ACCESS

THANK YOU FOR ATTENDING

Join us next Wednesday July 5th 2017 – SnapTracker: Stock Catalog
Part 02