

Catalog Management - How To's

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Catalog Management

Overview

The **Catalog Management** screen allows administrators to manage catalog Part Types and define how they behave throughout 1place. From this screen, you can:

- organize catalog categories,
- assign pricing and purchasing categories,
- configure default discounts,
- establish stocking thresholds,
- determine whether specific Part Types should be excluded from **Find Parts** searches.

By maintaining these settings, businesses can improve search results, standardize pricing behavior, and better organize inventory for sales and purchasing.

Accessing Catalog Management

There are 3 ways to access the **Catalog Management** screen in 1place.

Option 1: From Find Parts

1. Open the **Find Parts** screen.
2. Perform a part search to display the search results.
3. Click the **Settings** (gear) icon.
4. Select **Catalog Management**.

The 'Find Parts' interface includes search filters for Ship To, Bill To, Customer PO #, Payment Terms, Ship Via, Warehouse, and Comments. It also has a VIN # search section and a 'Search' button. A table lists parts with columns for X, Item #, OEM #, and Description. On the right, there are 'Customer Lists Settings' and a 'Manage Catalog' button circled in green.

Option 2: From the Item Details Catalog Tab

1. Open an inventory item.
2. In the **Item Details** screen, select the **Catalog** tab.
3. Click **Manage Catalog**.

The 'Item Detail' screen shows information for 'ACURA VIGOR 93-94 - Front bumper cover (GS, prima)'. It includes a 'To Sync' checkbox, a 'Last Synced' timestamp, and a 'Catalog' tab in the navigation bar. The 'Manage Catalog' button is circled in green.

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This opens the **Catalog Management** screen, where you can manage Part Types, catalog categories, pricing categories, purchasing categories, inventory thresholds, and other catalog settings.

Option 3: From the Settings > Sales > Find Parts Tab

- 1.

Setting Part Type Defaults

- Each row in the Catalog Management table represents a **Part Type** and its associated configuration.
- Administrators can update the information directly within the grid to customize how each Part Type behaves throughout the system.

Available Columns

Column	Description
Exclude PartType	Excludes the selected Part Type from appearing in Find Parts searches.
Part Type	The unique identifier assigned to the catalog Part Type.
Sort Order	This defines the ORDER the parts will be displayed in on the Find Parts screen and the Customer Portal (Find Parts screen). This sort order will be copied to the Item Detail > Find Parts Sort Order field.
Search Catalog Category	The primary category used when searching for parts on the Find Parts and Customer Portal screens.
Search Catalog Sub-Category	A more specific grouping used to further filter the search results, by Sub-Category.
Item Pricing Category	Determines the pricing category assigned to items within this Part Type (on the Customer Details > Pricing screen and the Item Detail > Pricing Category).
PO Category	Specifies the purchasing category used when creating Purchase Orders using the Replenish Stock screen.
Discount % List Price	Default discount percentage applied to this Part Type to create a new List Price (x % off of the EOM List Price).
Min	Minimum recommended inventory quantity. This will put a blanket Minimum on all new parts for the Part Type (but only when the part is first created). This is an option on the Replenish Stock screen.
Max	Maximum recommended inventory quantity. This will put a blanket Maximum on all new parts for the Part Type (but only when the part is first created). This is an option on the Replenish Stock screen.
# Sales (Last 365)	Number of sales recorded during the previous 365 days. This will help determine how 'active' the part type is.
# Units in Stock	Current inventory quantity available for the Part Type.

Excluding Part Types from Find Parts

The **Exclude PartType** option allows administrators to prevent selected Part Types from appearing in **Find Parts** search results.

To exclude a Part Type:

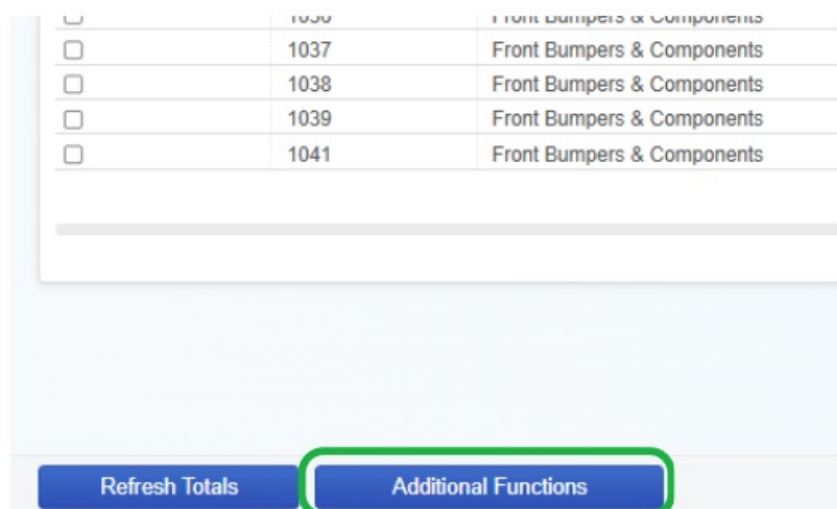
1. Locate the desired Part Type.
2. Select the **Exclude PartType** checkbox.
3. Save your changes.

Catalog Management						
Part Types Filter To Exclude From Find Parts Searches						
Exclude PartType	Part Type	Search Catalog Category	Search Catalog Sub-Category	Item Pricing Category	PO Category	
☒	1000	Front Bumpers & Components	Front bumper cover	Bumpers	Sheet Metal	
☐	1002	Front Bumpers & Components	Front bumper face bar	Bumpers	Sheet Metal	
☐	1003	Front Bumpers & Components	Front bumper assembly	Bumpers	Sheet Metal	
☐	1004	Front Bumpers & Components	LT Front bumper extension outer	Bumpers	Sheet Metal	
☐	1005	Front Bumpers & Components	RT Front bumper extension outer	Bumpers	Sheet Metal	
☐	1006	Front Bumpers & Components	Front bumper reinforcement	Bumpers	Sheet Metal	
☐	1007	Front Bumpers & Components	Front bumper reinforcement lower	Bumpers	Sheet Metal	

Once excluded, that Part Type will no longer appear in Find Parts searches.

Additional Functions

The **Additional Functions** menu located at the lower left corner of the screen provides administrative tools for managing imported catalog data, updating inventory information, maintaining search catalogs, and configuring Partslink import settings.



Important: Many of these functions perform bulk updates or permanently modify catalog data. They should only be used by authorized administrators who understand their impact.

The available functions are grouped into three categories.

Manage Partslink Import Tool Settings & Filters

Manage Partslink IMPORT TOOL Settings & Filters

- ☐ 1a. UPDATE (to EXCLUDE) All PTypes (on the PTypes Filter list) where the # Sales is < [0] AND the # Units in Stock is < [0] (to NOT import/update parts with those PTypes)
- ☐ 1b. Export PTypes List to Excel.
- ☐ 1c. Import PTypes List from Excel (using the exact Excel PTypes export format in function #5 above)
- ☐ 1d. DEFINE how the Item Description will be created.
- ☒ 1e. FILTER (exclude) certain Makes, Models, and Year Ranges from the Catalog results.

[Choose File](#) No file chosen

1a. Update (Exclude) Part Types

Automatically excludes Part Types that meet specified sales and inventory thresholds.

Enter:

- Maximum number of Sales
- Maximum Units in Stock

Any Part Type with values below the specified thresholds will be excluded from future Partslink imports and updates.

This helps prevent obsolete or inactive Part Types from being imported.

1b. Export Part Types List to Excel

Exports the current Part Types configuration to a Microsoft Excel file.

The exported file can be used for backup purposes or to perform bulk edits before importing the updated configuration back into 1place.

1c. Import Part Types List from Excel

Imports a previously exported Part Types configuration.

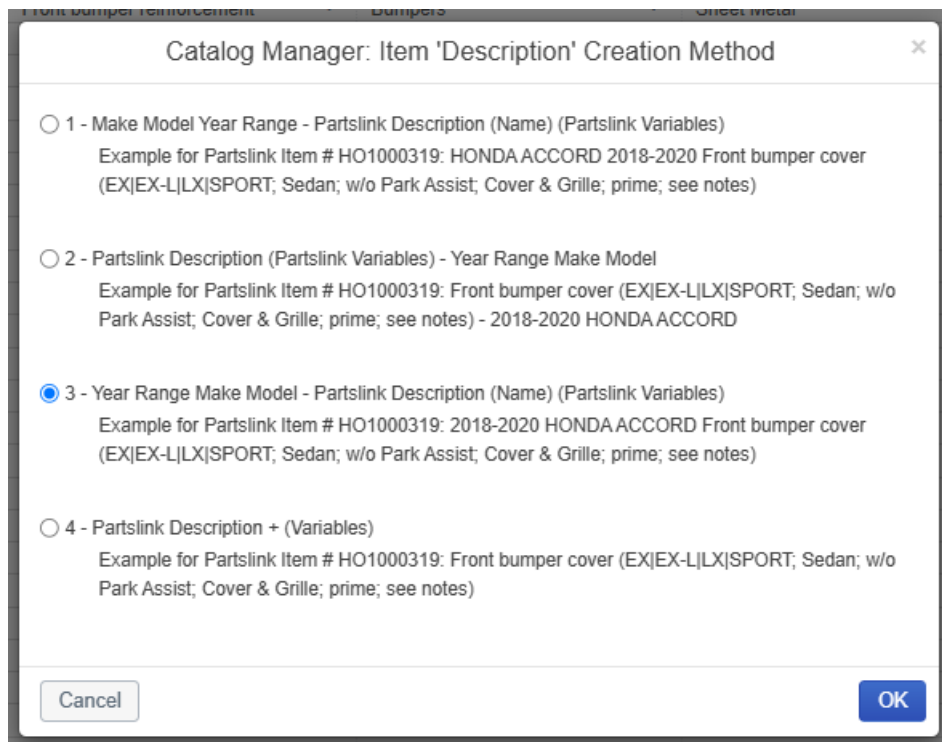
Note: The Excel file must use the same format generated by the **Export Part Types List to Excel** function.

1d. Define Item Description Creation Method

The **Item Description Creation Method** determines how item descriptions are generated when importing Partslink catalog data into 1place.

To configure the description format:

1. Open **Additional Functions**.
2. Select **1d. Define Item Description Creation Method**.
3. Choose the preferred description format.



4. Click **OK** to save your selection.

Available Description Formats

Option 1 – Make Model Year Range – Partslink Description (Name) (Partslink Variables)

Displays the vehicle information followed by the Partslink description.

Option 2 – Partslink Description (Partslink Variables) – Year Range Make Model

Displays the Partslink description first, followed by the applicable Year, Make, and Model.

Option 3 – Year Range Make Model – Partslink Description (Name) (Partslink Variables)

Displays the Year Range, Make, and Model first, followed by the Partslink description.

Option 4 – Partslink Description + (Variables)

Displays only the Partslink description and applicable variables without including the vehicle information.

Important: Changing this option affects the description format used during future catalog imports. Existing item descriptions are not automatically updated.

1e. Filter Makes, Models, and Year Ranges

This function allows administrators to exclude specific vehicle Years, Makes, and Models from being included when generating new catalog items.

Makes, Models, Year Ranges to Exclude from Searches
Sytron

BEGINNING YEAR FILTER
(The 4 digit year that you select below will be the HIGHEST year INCLUDED in the list of parts to add. Example: A part for a 2008-2012 Honda Accord would NOT be included on the list of parts to add if the year you selected below was 2009.)
Enter an year :

MAKE / MODEL FILTER
(When the system generates a list of New Parts to add, that are not already in place, any parts with the Makes and/or Models listed below will be filtered off the list.)

Makes to Exclude	Models to Exclude	Action
ALFA ROMEO		Delete
ASUNA		Delete
BLUE BIRD		Delete
		Delete

Beginning Year Filter

The **Beginning Year Filter** specifies the highest model year that will be included during catalog generation.

Enter a four-digit year to exclude newer vehicle models.

Example

If the Beginning Year Filter is set to **2009**, a part applicable to a **2008–2012 Honda Accord** will **not** be included because the application extends beyond the selected year.

Make / Model Filter

Configure the following exclusions:

- **Makes to Exclude** – Excludes all parts associated with the selected make.
- **Models to Exclude** – Excludes only the selected model for the specified make.

To remove an exclusion, click **Delete** beside the corresponding entry.

Note: These filters affect the generation of new catalog items only. Existing inventory and catalog records are not modified.

Mass Update Item List

2a. Update Items with No Part Type

The **Update Items with No Part Type** function automatically assigns a **Part Type** to imported Partslink items that do not already have one.

The process identifies eligible items based on the following conditions:

- The **Part Type** field is empty.
- The Item Number follows the Partslink numbering convention (for example, **HO1000254**).

When these conditions are met, the system extracts the Part Type from the Item Number and populates the **Part Type (Alt 2)** field.

Confirmation Message

When this function is selected, a confirmation window appears explaining the update process.

To continue:

1. Review the confirmation message.

2. Type **YES** into the confirmation field.
3. Click **OK**.

Selecting **Cancel** exits without making any changes.

Example

If the Item Number is **HO1000254**, the system identifies **1000** as the Part Type and automatically inserts **1000** into the **Part Type (Alt 2)** field.

Important: This is a bulk update operation. Verify that imported Partslink items use the expected **Item Number** format before running this function.

2b. Update Item List Categories

Updates existing inventory items using the category values configured in the Catalog Management screen.

The following values are updated when the Part Type matches:

- Item List Category
- Search Catalog Sub-Category
- Pricing Category
- Purchase Order Category

2c. Find and Delete Non-Selling Items

Finds and removes inventory items and their related catalog entries when all of the following conditions are met:

- The Part Type is excluded.
- The item has no recorded sales.
- The item has no inventory currently in stock.

Warning: This function permanently deletes qualifying records.

Mass Update Item Search Catalog

3a. Delete Imported Catalog Records

Deletes all catalog records that were imported through the Catalog Management tool.

Only imported search catalog records are removed. Inventory items are not affected.

3b. Import Catalog from Excel

Imports search catalog records from a Microsoft Excel file.

This function is commonly used when rebuilding or updating catalog information from an external source.

3c. Rebuild the Search Catalog

Rebuilds the complete **Year / Make / Model** search catalog.

Run this function after major catalog imports or updates to ensure the search catalog reflects the latest information.

Other Functions

Refresh Totals

Click **Refresh Totals** to recalculate and update the displayed sales and inventory totals.

Pagination

The bottom-right corner of the screen provides pagination controls.

Users can:

- Navigate to the previous or next page.
- Select a specific page.
- Click **Show All** to display every catalog record.

Best Practices

- Review catalog categories regularly to maintain accurate search results.
 - Configure pricing and purchasing categories consistently across similar Part Types.
 - Use **Exclude PartType** only for categories that should not appear in Find Parts searches.
 - Review inventory **Min** and **Max** values periodically based on sales activity.
 - Export Part Types before performing large updates.
 - Verify import files before importing.
 - Use delete functions only after confirming the affected records are no longer required.
 - Rebuild the search catalog after significant catalog imports or structural changes.
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