Part Categories and Sub Categories

07/29/2024 10:02 am CDT

Overview

Parts can be organized in **Categories** and **Sub Categories**. This is a great way to organize large part lists into more manageable buckets. If you are a home remodeler, you can have Kitchen Cabinet as a Category then organize Sub Categories by brand, color, material, etc.

Edit a Part Category		
Name*	Werewolves	
nack internety.	Summarization	
Display in Summary? Order	Display count of parts in this category on contact details	
Subcategories		
Add Name	Active	
Q	(All) 👻	
Edit Delete Big	Yes	
Edit Delete Small	Yes	
10 -	Page 1 of 1 (2 items) $\langle 1 $ of 1 \rangle	

Settings and Navigation

In **Control Panel > Parts**, click the **Categories** button at the top.

Part Co	itegories		Parts	Categories Templates Solutions Vendors
Page 1 of	1 (1 items) (() () () () () () () () () () () () (
<u>Add</u>	Name	Category	Track Inventory?	Disp Summary?
Edit	Werewolves	Werewolves	No	No

Create Part Sub Categories

Sub-part categories and sub-sub categories will help brands with huge quantities of parts be able to more easily organize them, and access parts quickly via the **Mobile App** in the field.

Step 1

Once on the category page, click Add or Edit a part category.

	Add Nam
	Edit Were
Add a New Part Catego	pry
Name*	
Track Inventory?	Enable inventory tracking for parts in this category
	Summarization
Display in Summary?	Display count of parts in this category on contact details
Order	

Don't forget to **SAVE**.

Step 2

Once you've added what you need, you can go into the **Parts** tab and begin organizing, or use the bulk upload feature for Parts.

Edit a Part Category		
Name* Track Inventory?	Werewolves Enable inventory tracking for parts in this Summarization	category
Display in Summary? Order	Display count of parts in this category on	contact details
Subcategories		
Add Name	*	Active
Q	(All)	
Edit Delete Big		Yes
Edit Delete Small		Yes
Add a New F	Part or Add-On	
	Bear trap	
	Active	
	Active Description*	
	Active Description*	
	Active Description* Color Taxable	
	Active Description* Color Taxable Category Werewolves	7

You can then add them to proposal templates or manually add them as needed when generating a proposal. Either start typing in the part or hit "Search", which will appear at the top of the page and include all categories and sub categories.

Find a Part	
Category	Werewolves V
Subcategory 1	None 🔻
Name or Description	Q
Include inactive parts?	
Name	Description
Bear Trap	For lar, er lupins in the field.
Invoice Appointment for	* This field is required
Service Agent	Daphne Blake
Start/Finish Times	time 10:04am
Current Duration	0 mins
Internal Note	
Customer Notes	
	<i>k</i>
ltern	Description
ltem Ghost Spr	Description aying
Ghost Spr	Description raying V repellant for spirits around any propert

FAQs

Why isn't my part category showing when I'm creating a proposal? I've checked and everything with the category is set up correctly.

The most common issue is not having active parts in that category. If you do not see the category show as an option when trying to "search" for a part then it usually means there are no active parts for the system to display. You will need to go in and turn them **Active**, and that should fix the problem.