Part Categories and Sub Categories

09/29/2025 11:19 am CDT

Overview

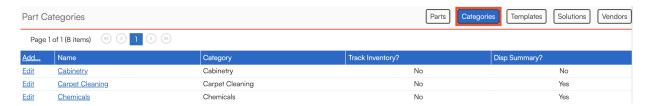
Part Categories and **Sub Categories** are essential tools for organizing and managing large inventories within service**minder**. By grouping parts into logical categories and subcategories, users can streamline part selection, improve inventory tracking, and make proposal generation more efficient. This structure is especially beneficial for businesses with extensive part lists.

This article will review:

- Settings and Navigation
- Create Part Subcategories
- Organizing Parts
- FAQs

Settings and Navigation

In Control Panel > Parts, click the Categories button at the top. Here, you can add and edit categories.

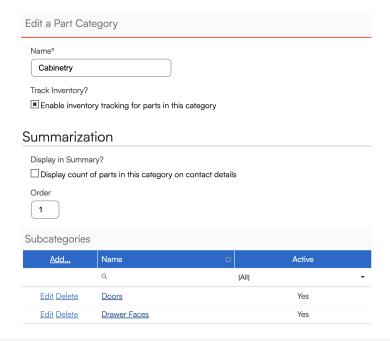


Only users with the "Parts" permission granted can add or modify categories and assign parts to them. Franchisees may have restricted access depending on brand-level settings.

When creating a category, you can:

- Name the category.
- Enable Inventory Tracking for all parts in the category.
- Choose to display part counts in summaries on contact details pages.
- Set the display order for categories (i.e., override alphabetical order to display categories in a custom order).

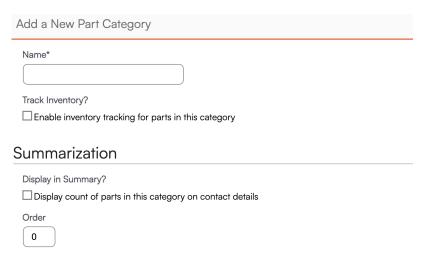
When editing a category, subcategories can be added for even more detailed organization.



Create Part Subcategories

Sub-part 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.

1. First, make sure your category is already created and saved.



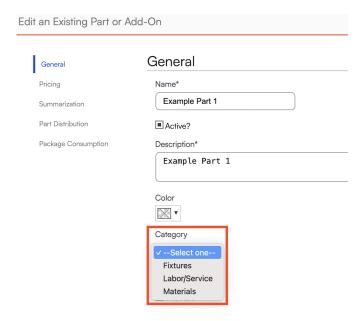
2. **Edit** that part category and use the Subcategories grid at the bottom of the page to create as many new subcategories as you need.



Organizing Parts

Once you've added the categories and subcategories that you need, you can go into the **Parts** tab and begin organizing your parts.

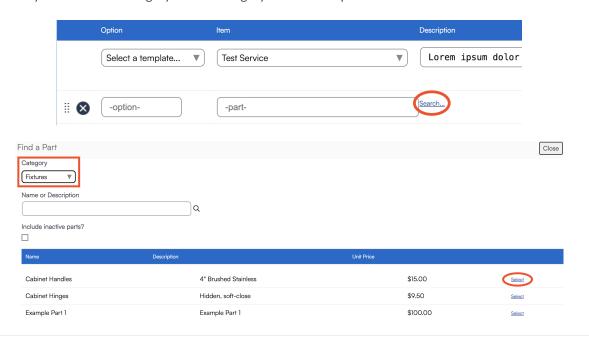
Edit individual parts and select a category and subcategory (if applicable) from the dropdown menu:



Or use the bulk upload feature for Parts.

- 1. Download your list of parts using the download button at the top of the parts grid.
- 2. Edit the Category and Subcategory columns in the CSV file.
- 3. Re-upload the file using the Upload Parts button.

When adding a part to a proposal, appointment, or invoice, click "Search", which will open a tool at the top of the page. Here you can use the category and subcategory to locate the part.



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.

How do I enable inventory tracking for a category?

Edit the category and check the box for "Enable inventory tracking for parts in this category." All parts assigned to this category can then be tracked. Learn more about Inventory Tracking.