



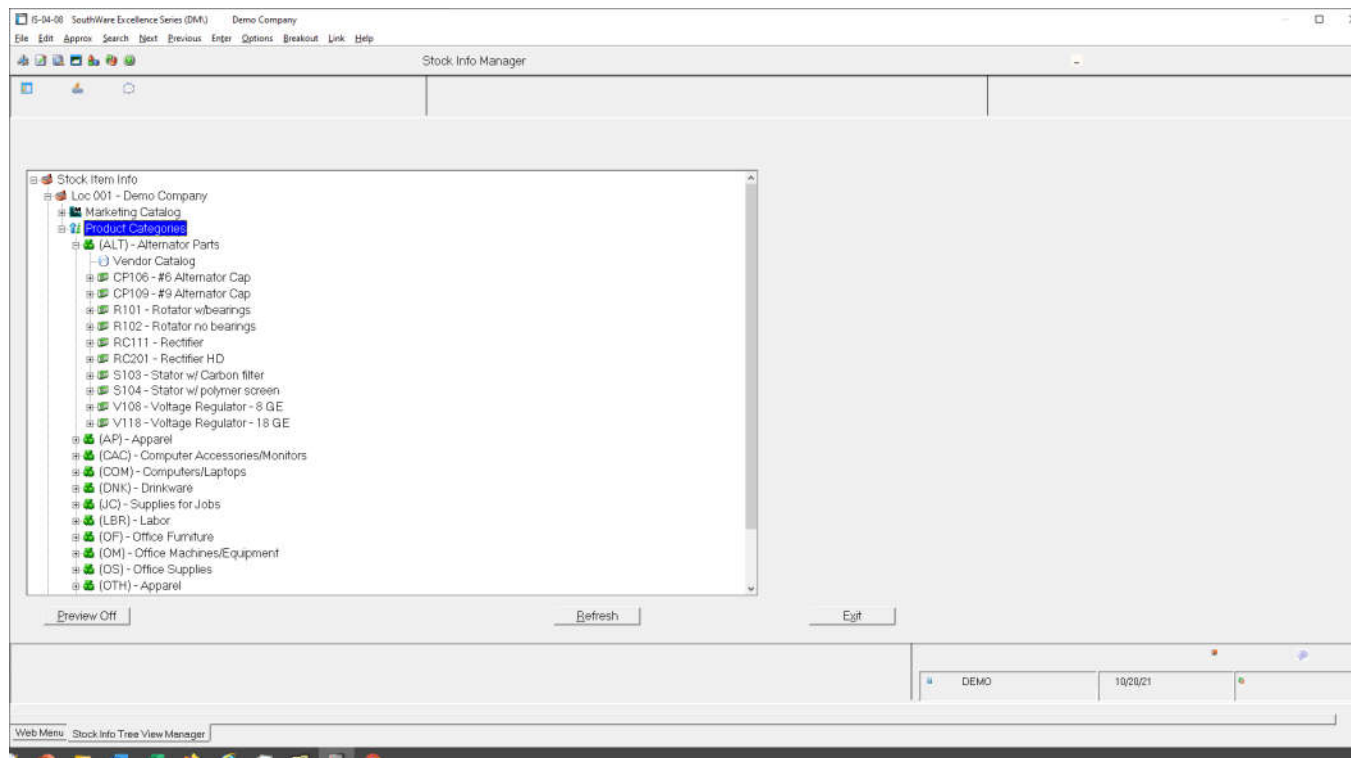
Be a Southware Genius

2021 SPA Digital Conference

Using the Marketing Catalog

- You already have a variety of ways to look up parts but the purpose of a catalog is to let you find the parts you need in a manner that makes sense and is organized.
- You want this capability to be available thru out the system.
- You need it to be flexible and easy to adjust.
 - To take full advantage of the catalog, you need ImportMate, which you should already have, and also have someone who knows your stock and knows how to use ImportMate and Excel.
- You can also guide staff and customers to particular items once they are used to using the catalog, and encourage upselling or add on products, just by how you group items.

Product categories can show you parts that are of the same general... well, category, but for specific needs you need them more deeply organized.

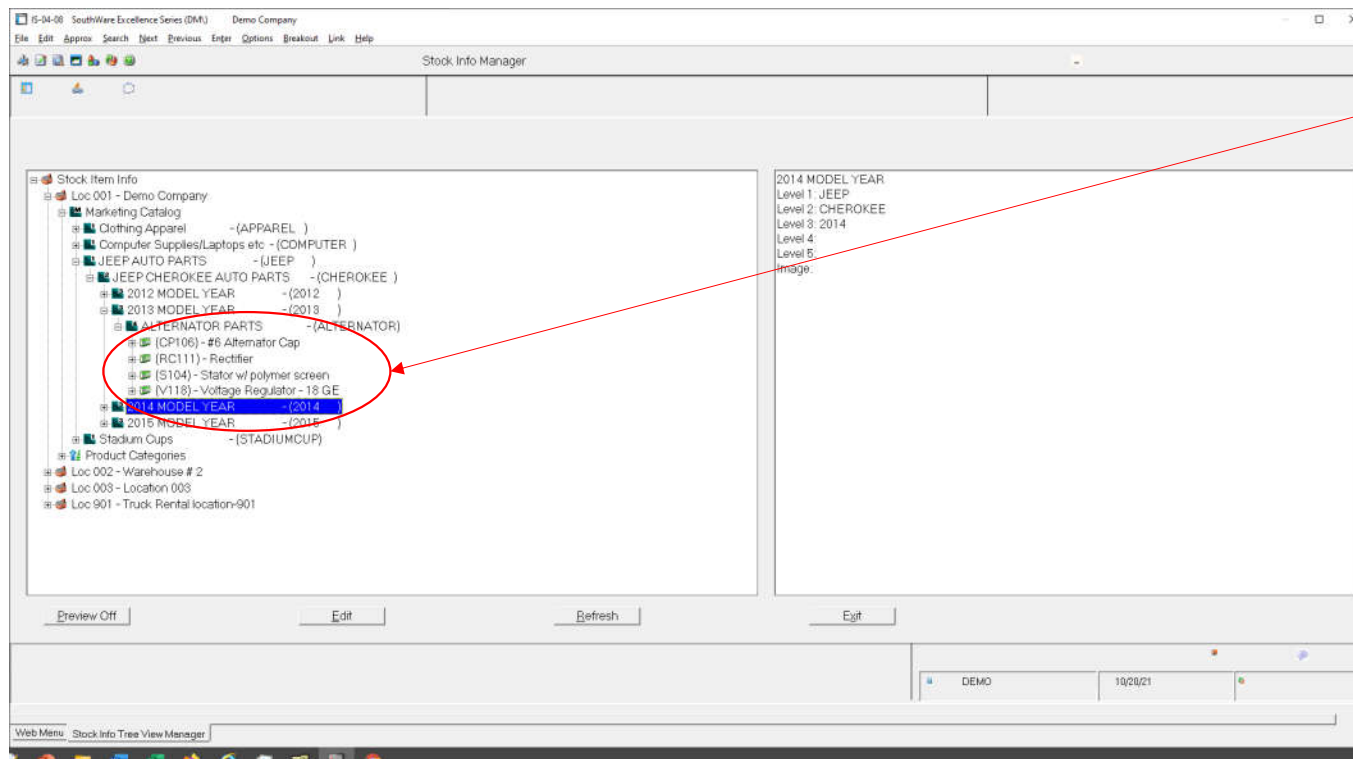


Here, you can see all the automobile alternator parts you have in one big long list, but your customer has no idea which Voltage Regulator they need.

As the items you keep as inventory expand, it can get ever harder for your staff to remember all the connections between different parts.

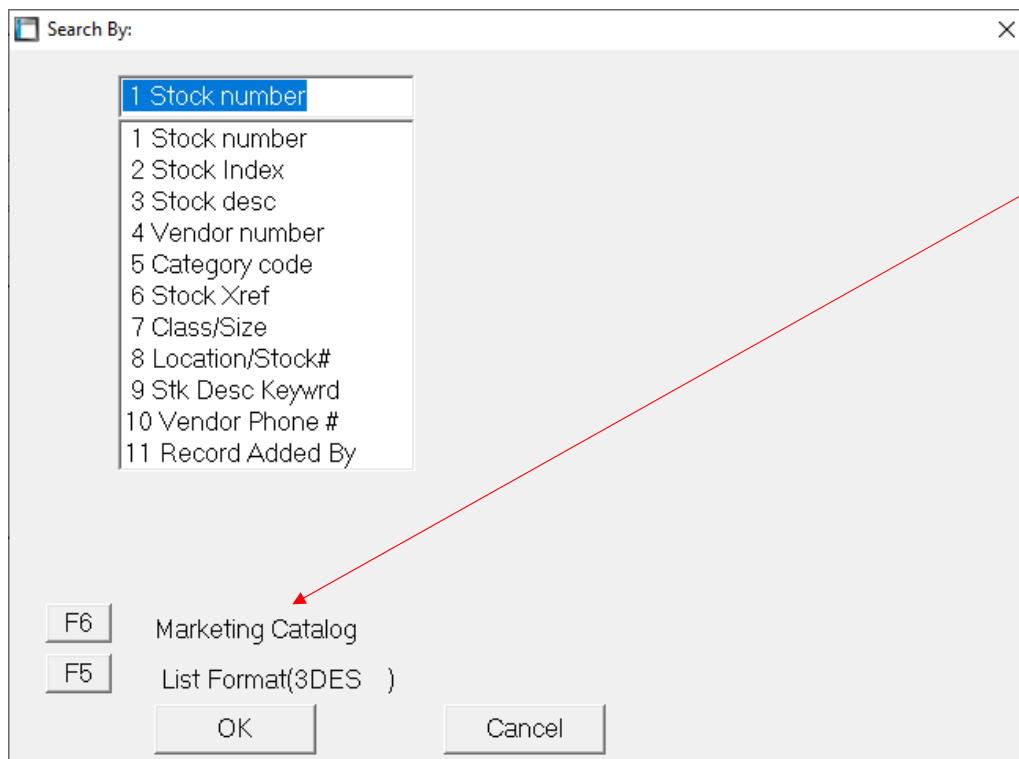
Looking at a list of similar regulators, will your staff remember the right one every time?

But with a well configured catalog....



All the parts for the 2013 Jeep Cherokee are grouped together in one place.

The catalog can be accessed throughout the system....



Everywhere you see a stock lookup, you can see the catalog right there at the F6 button

Catalog levels are defined at IS-07-20-01

The screenshot shows a software window titled 'Catalog Level Maintenance' with a menu bar (File, Edit, Approv, Search, Next, Previous, Enter, Options, Breakout, Link, Help) and a toolbar. The main area contains a form with the following fields:

| | |
|------------------------|---------------------------------|
| *1. Catalog Level 1 | JEEP |
| *2. Catalog Level 2 | CHEROKEE |
| *3. Catalog Level 3 | 2012 |
| *4. Catalog Level 4 | ALTERNATOR |
| *5. Catalog Level 5 | |
| 6. Catalog Description | ALTERNATOR PARTS |
| 7. Image Filename | |
| 8. Status | <input type="checkbox"/> Active |
| 9. Comments | |

At the bottom right of the form, there is a '# to change' field with a minus sign, and 'OK' and 'Cancel' buttons. Below the form, there is a status bar with 'DEMO', '10/20/21', and '92'. A 'Web Menu' tab is visible at the bottom left.

Each level is defined as a separate record, so there is a Level 1 Record for JEEP, a Level 2 Record for JEEP CHEROKEE, and so on down, up to 5 levels deep.

Stock items are assigned to levels at IS-07-20-02

| | | |
|---------------------|------------|------------------|
| *1. Catalog Level 1 | JEEP | |
| *2. Catalog Level 2 | CHEROKEE | |
| *3. Catalog Level 3 | 2012 | |
| *4. Catalog Level 4 | ALTERNATOR | |
| *5. Catalog Level 5 | | |
| *6. XRef Type | S | # Alternator Cap |
| *7. Related ID | CP106 | |
| *8. Vendor Number | | |

Parts can be assigned to multiple places in the catalog. If the same Alternator cap is used for model years 2012 thru 2014, then it gets three separate records, one for each year so that it will be found everywhere it is needed.

Questions

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