



Catalog Item Categories

	Define and manage groupings associated with milestone rate catalogs.
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Please note that depending on your Beeline Platform settings, this feature may, or may not, be turned on. Reach out to your Beeline Representative to adjust settings.

How to Navigate to Catalog Item Categories via Self-Service:

1. Log in to the Beeline Platform using your *username* and *password*. Your Home page appears.
2. Click the **My Preferences** icon  at the top right of your page in the Header Menu.
3. Hover over the **VMS Settings** menu item and click **Statement of Work**.
4. Click **Catalog Item Categories** from the list of available Statement of Work Self-Service features to be taken to the **Catalog Item Categories** screen.

How to create a new Catalog Item Category:

Complete steps 1-4 above.

5. Click **Add New**.
6. Fill out the following fields:
 - **Name:** Name the Catalog Item
 - **Code:** Create a code with no spaces
 - **Description:** Add a description to help identify the Catalog item.
 - **Is Active (checkbox):** Check box for Catalog Item to be viewable
7. Click **Ok** to save and return to the Catalog Item Categories screen or click **Save and Add New** to Save and create another Catalog Item Category.

How to associate a Catalog Item to a Catalog Item Category:

(Please see the [Catalog Item Self-Service](#) document to see how to set Catalog Items up.)

Complete the steps under the “**How to Create a New Catalog Item**” section of the Catalog Item Self-Service Document above and select the Category Item Category to associate.

Main Benefits:

- Allows set costs to be predetermined.

Things to Note:

- The Catalog Search within a SOW only respects the driving fields (I.e., Supplier, Industry) if they have been Saved in the SOW. Therefore, it is important to complete and Save the General Info tabs before creating a new milestone and reviewing Catalog Items and Catalog Item Categories.