



Catalog Items

	Define and manage milestones and deliverables with pre-negotiated rates.
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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 Items 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 Items** from the list of available Statement of Work Self-Service features to be taken to the **Catalog Item List screen**.

How to create a new Catalog Item:

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 List screen or click **Save and Add New** to Save and create another Catalog Item.
8. After creating the Catalog Item and returning to the Catalog Item List screen, click the **name link** of the Catalog Item that you set-up from the **Translated Name column** to update the Catalog Item amounts.
9. From the Catalog Item Amounts screen, click **Add New** to be taken to the Add New Catalog Item Amount screen.
10. Fill out the necessary fields in the **Drivers** section:
 - **Currency** (required): select the currency of the Catalog Item
 - **Industry:** select the industry of the Catalog Item

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- **Supplier:** select the supplier of the Catalog Item. If a supplier is selected, this means that if you select that supplier on a SOW and save before you get to the financial section, it will pull in this client-specific catalog item.
- **Catalog Item Category:** If Catalog Item Categories are set-up you can associate it to one. *(Please see the [Catalog Item Category Self-Service](#) document to see how to set them up.)*

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.