Catalog Administration

Catalog Administration manages data for catalogs, catalog administrators and contacts.

Topics

How do I locate catalog administration?

How do I set up catalog administration?

What is an internal and an external catalog?

How do I add sections and fields?

How do I manage contacts & users?

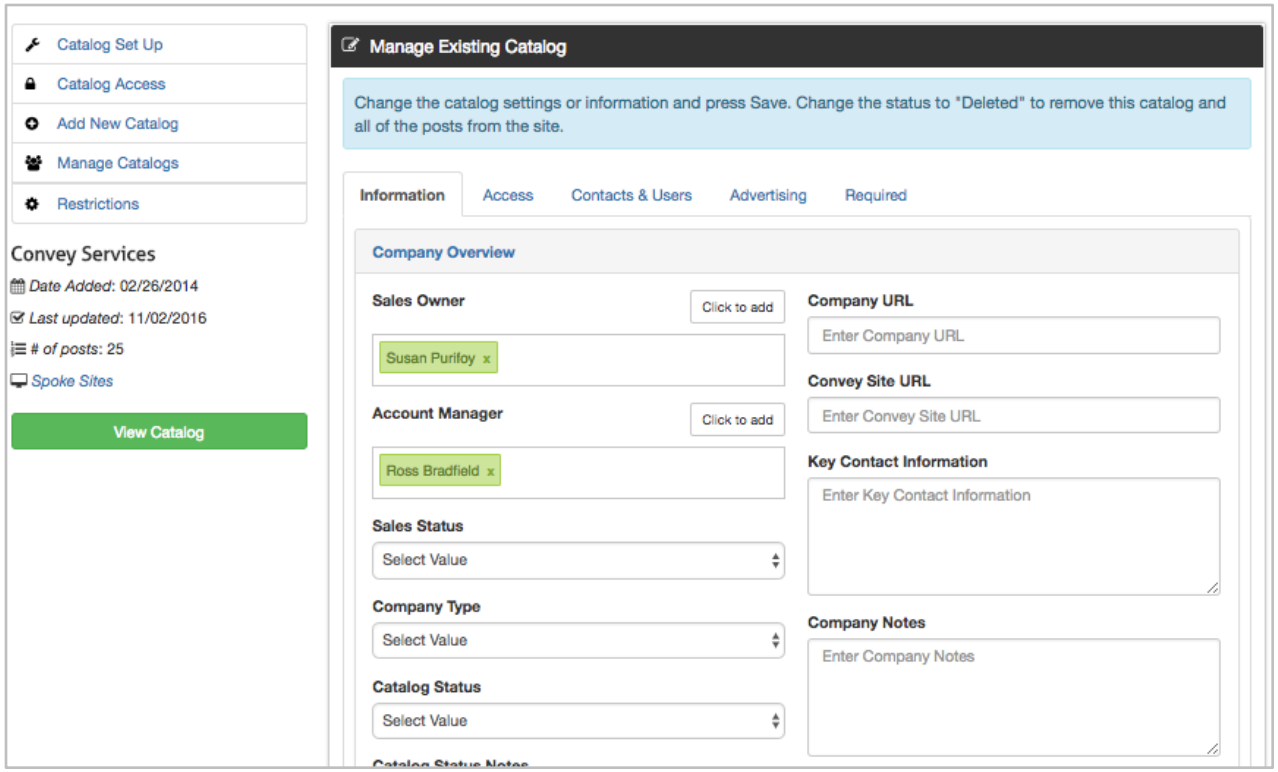
What is Access?

What is Advertising?

What is the Required Information?

Catalog Administration

Catalog Administration manages data for catalogs, catalog administrators and contacts. Set up catalog administration by adding sections and then fields within those sections. Catalog administration contains custom fields in the information section, privacy settings, contacts & users, and advertising information. It also displays required information such as the catalog name and subdomain.



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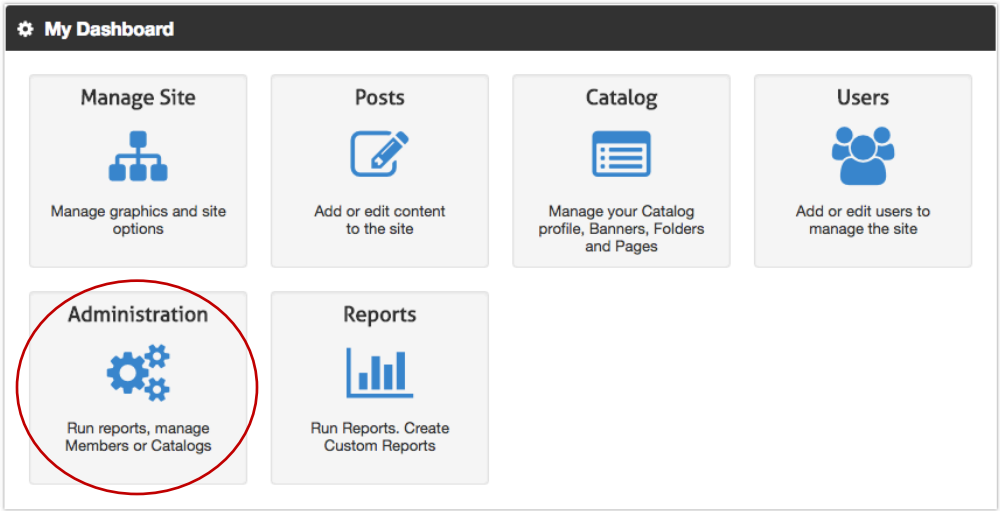
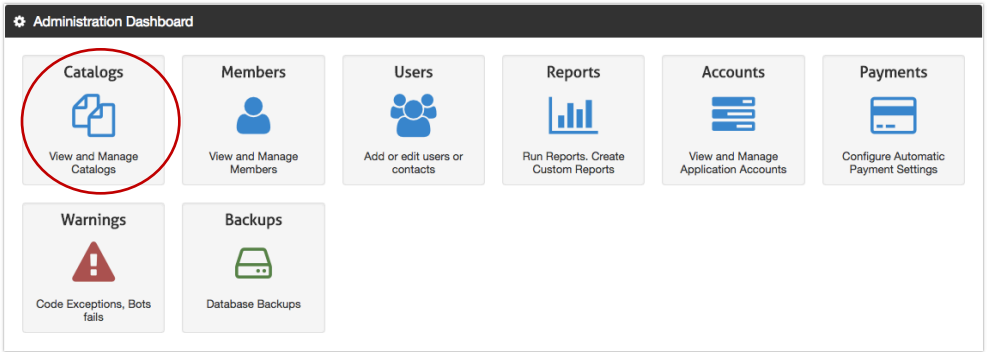
How do I locate this feature?
From your dashboard, select Administration, then select Catalogs.





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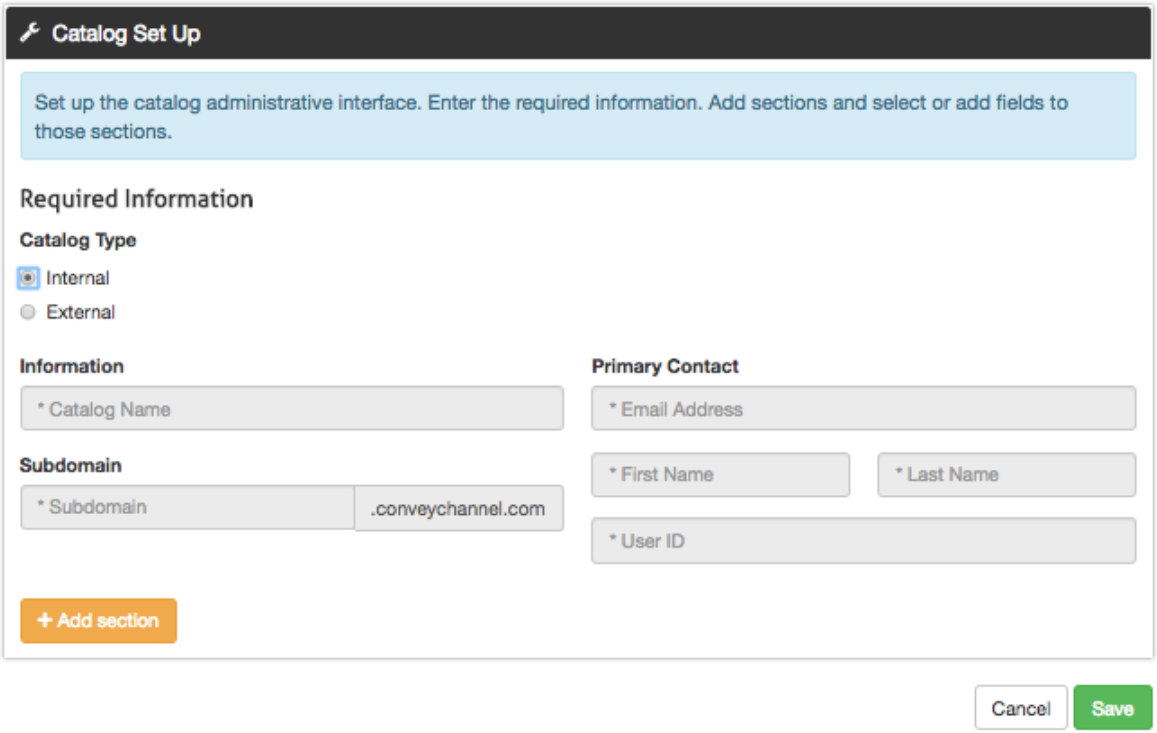
How do I set up catalog administration

Select Catalog Set Up from the left navigation bar in catalog administration. Select if the catalog is “Internal” or “External”. The Required Information fields automatically display. Click the orange “Add Section” button to add a new section for custom fields.



QUICK TIP

Internal catalogs are generally those that are managed by internal employees of the site owner. External catalogs are generally those that are managed by other organizations. Customize administration for internal and external catalogs separately.

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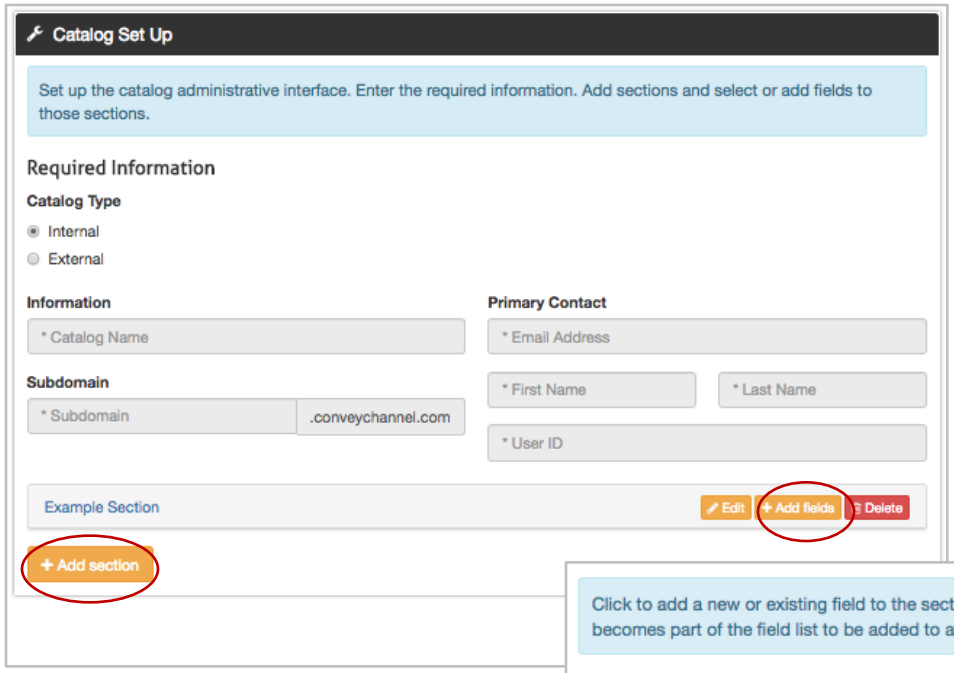
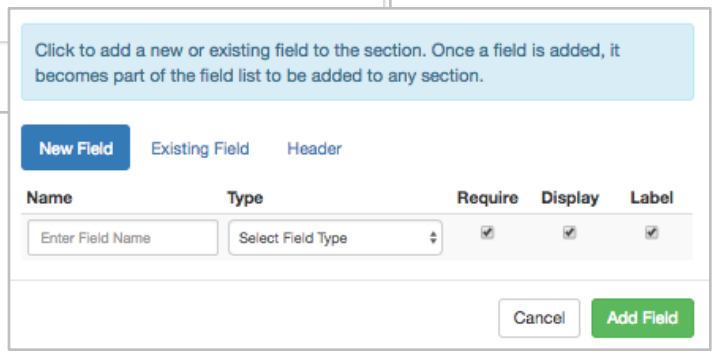
How do I add fields and sections?

Click the "Add Section" button to add a new section, the select "New Field" to add a new field or "Existing Field" to add a field from another section. Click "Header" to separate your fields within a section with a text header.





Click "require" to require that field have data, "display" to have the field seen in administration and "label" to show the field label. Click Add Field when finished.

QUICK TIP

Add an existing field that was previously created and repeat it again in another section if needed. Add a Header to create separation between fields. Move fields up or down and right or left to organize how they appear in two columns.

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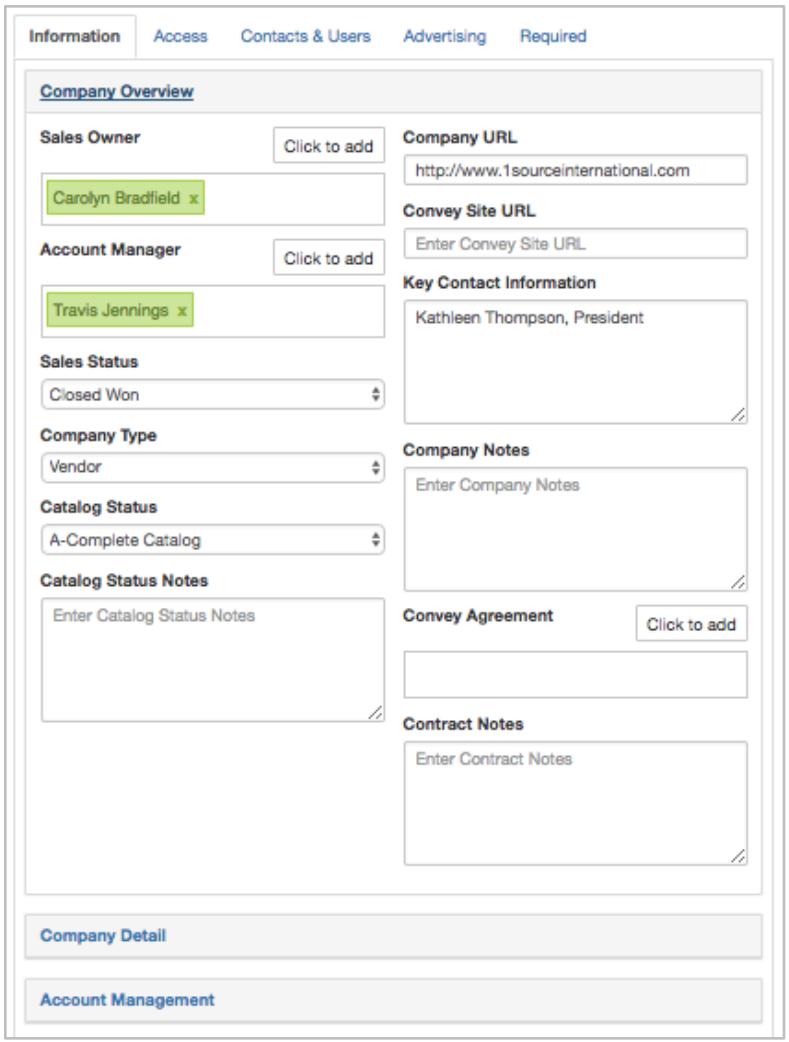
Where do my custom sections and fields appear once set up is complete?
Once you have set up administration, all new sections, headers and fields will appear under the "Information" tab. The first section will be opened and the other sections will display below. Click the name of the section to open or close it.



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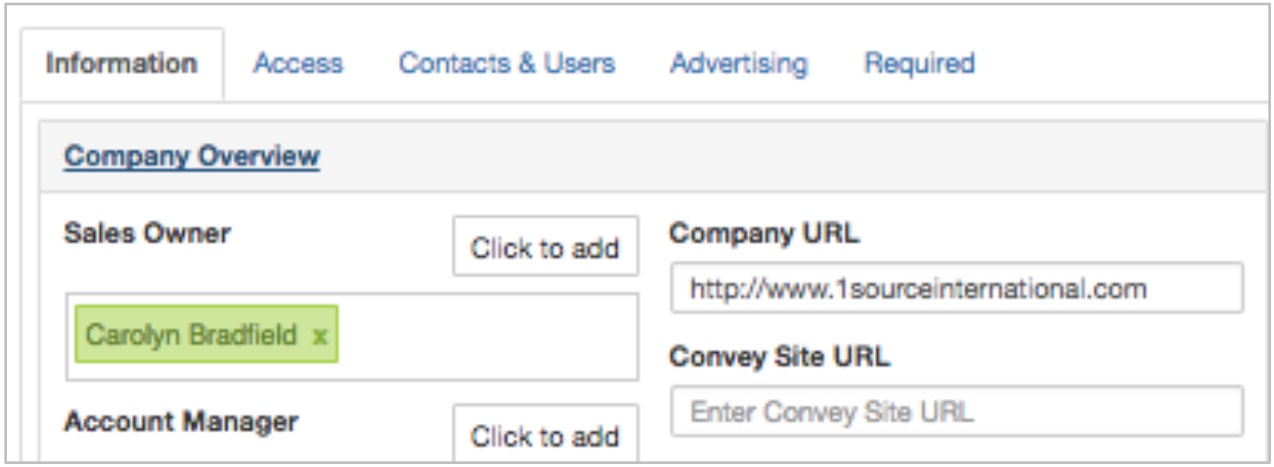
What information is managed in catalog administration?
"Information" contains the fields that were added in catalog set up. "Access" sets a catalog as public or private and can grant access to specific member types. "Contacts & Users" are catalog administrators or general contacts. "Advertising" grants the catalog the ability to place banner ads from the catalog on the site home page. "Required" manages the required catalog information such as catalog name, subdomain and status.



How do I export the information found in administration?
Convey reports lets you create custom reports to view data from administration and export that data to a CVS or Excel file. Access reports by from your dashboard by clicking the "Reports" tile.

QUICK TIP

Contacts & Users can be set up and managed from the Contacts & Users administration tile. Customize the fields you have to collect data on both contacts and users in this part of administration.