

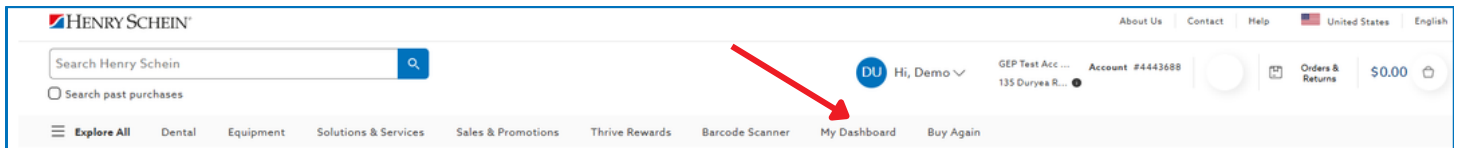
Create a Custom E-Catalog

A quick guide on creating and managing a custom E-Catalog.

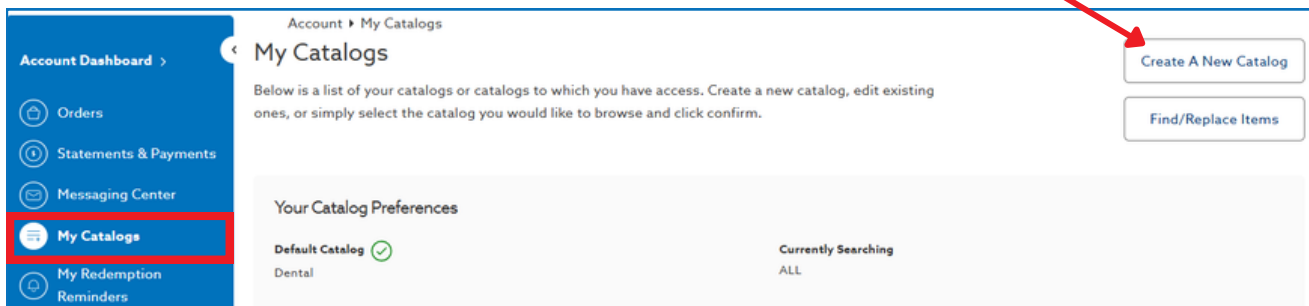
01

How to Create a Custom E- Catalog

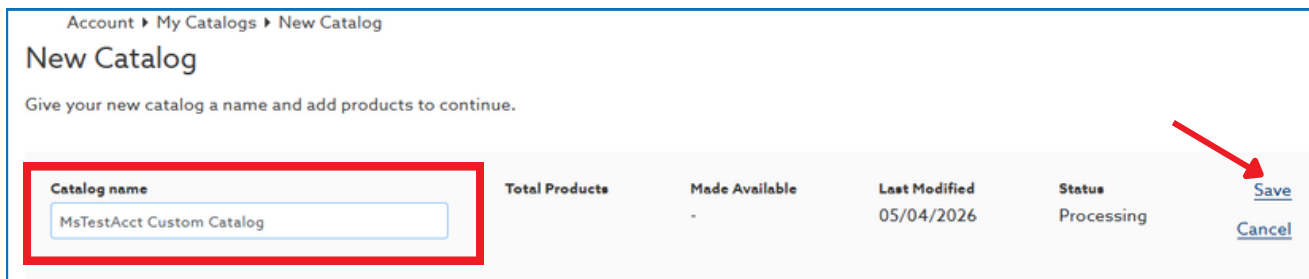
- After logging in, click **My Dashboard**.



- Click **My Catalogs**.
- Click **Create A New Catalog..**



- **Name** your catalog.
- Click **Save**.



Add Items to Custom E-Catalog

Option 1: Add Items Using Item Code Field

- Type **Item Code** in item code field.
- Click **Add To Catalog**.

Catalog Name: MsTestAcct Custom Catalog

Total Products: 0, Users: 1, Made Available: 05/04/2026, Last Modified: 05/04/2026, Status: Unavailable

Products | Add Item + | Exclusions | + | Users | +

Add by Item Code: 5703088 | ☐ Preferred | Add To Catalog

☐ Enable Automatic Substitutions | ☐ Expand All Substitutes

Filter | Search Products | Show 10 per page

Total Results: 0 items

Product (0) | Price | Preferred | Availability | Last Purchased

Option 2: Add Items By Uploading Excel File of Item Codes

- Click **Download Excel File**.
- A blank template file will download.
- Open the template file.
- Type or paste **item codes** in **Column A** (Column A is the only required column).
- Save the template file on your computer.

Catalog Name: MsTestAcct Custom Catalog

Total Products: 0, Users: 1, Made Available: 05/04/2026, Last Modified: 05/04/2026, Status: Unavailable

Products | Add Item + | Exclusions | + | Users | +

Add by Item Code: 5703088 | ☐ Preferred | Add To Catalog

☐ Enable Automatic Substitutions | ☐ Expand All Substitutes

Upload Excel File | Download Excel File

- Return to **Custom E-Catalog** that you created.
- Click **Upload Excel File**.
- Select the file you created, then click **Open**.
- Your file will upload to the catalog.
- Any exceptions that failed to load will be listed on the progress pop-up.

Catalog Name	Total Products	Users	Made Available	Last Modified	Status	
MsTestAcct Custom Catalog	0	1	05/04/2026	05/04/2026	Unavailable	Edit Details Duplicate Delete

Products
Add Item +
Exclusions
+
Users
+

Add by Item Code
☐ Preferred

☐ Enable Automatic Substitutions
☐ Expand All Substitutes

[Upload Excel File](#)
[Download Excel File](#)

03 Additional Options to Build Catalog

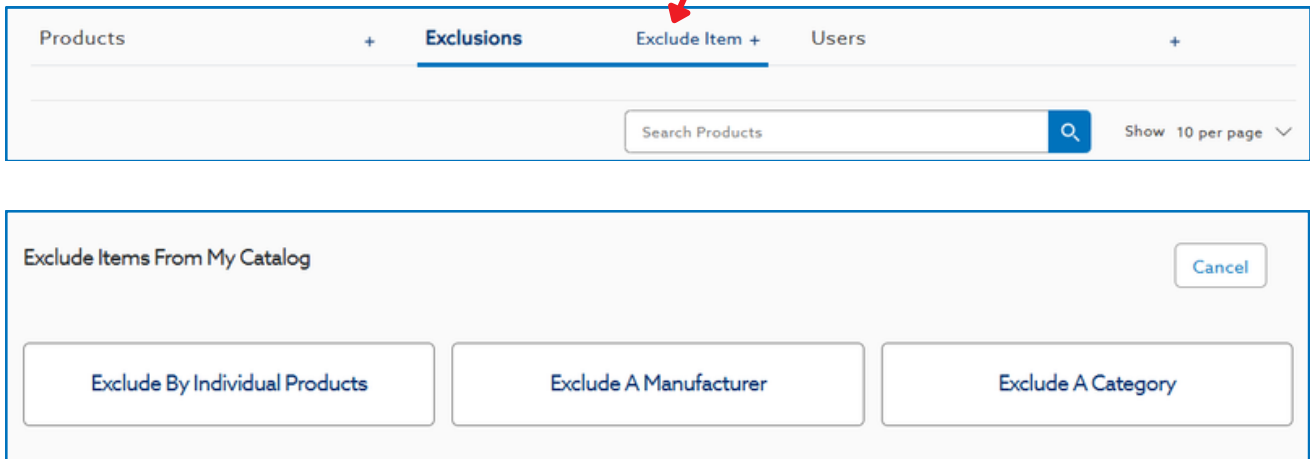
- Add items, exculsions and users to a catalog.
- Click **Add Item +** on the **Products** tab to see additional options.

Products
Add Item +
Exclusions
+
Users
+

Add by Item Code
☐ Preferred

Add Items to My Catalog Products

- Click **Exclude Item +** on the **Exclusions** tab to see additional options.

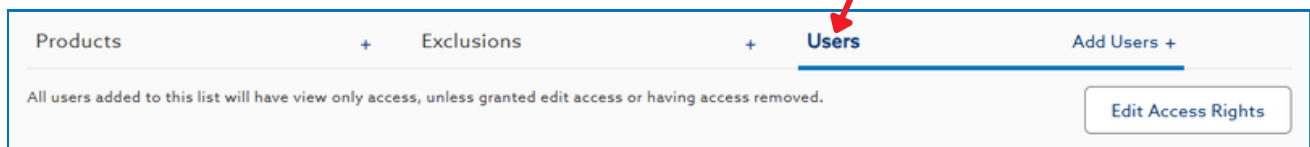


Products + **Exclusions** Exclude Item + Users +

Search Products Show 10 per page ▾

Exclude Items From My Catalog

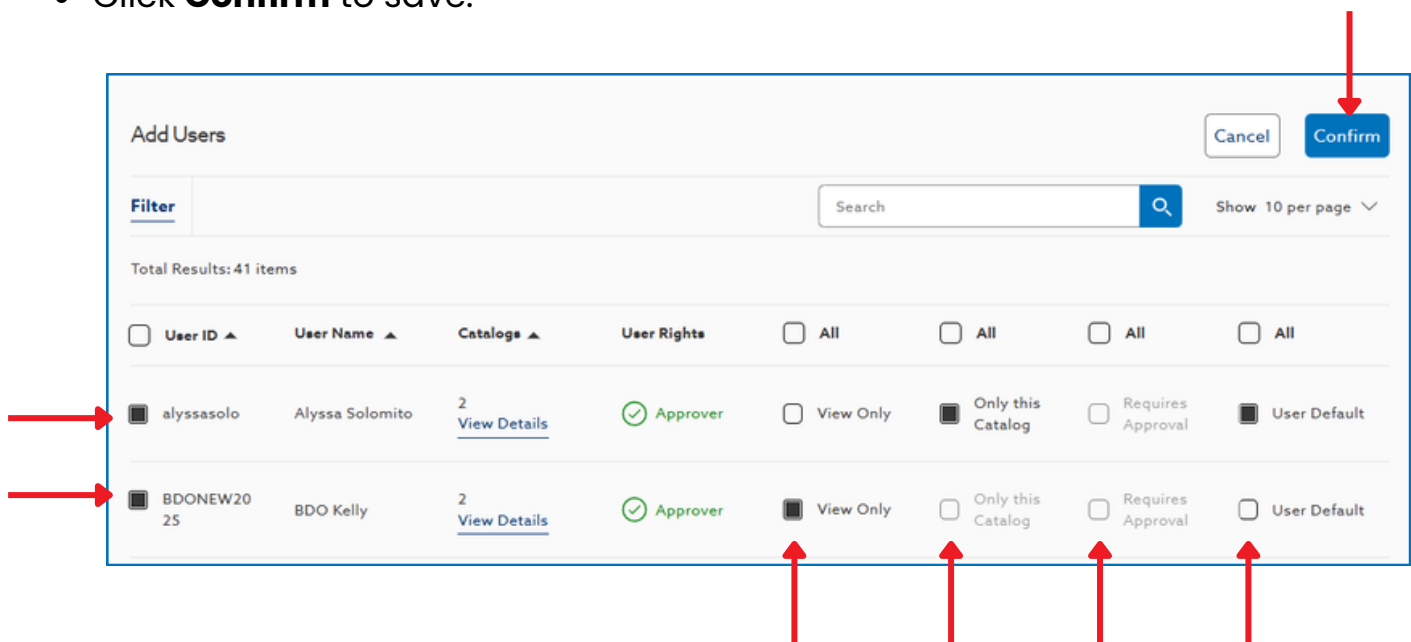
- Click **Add Users +** on the **Users** tab to add specific users to this catalog.



Products + Exclusions + **Users** Add Users +

All users added to this list will have view only access, unless granted edit access or having access removed.

- Select users from list.
- Assign **access rights**.
- Click **Confirm** to save.



Add Users

Filter Show 10 per page ▾

Total Results: 41 items

☐	User ID ▲	User Name ▲	Catalogs ▲	User Rights	☐ All	☐ All	☐ All	☐ All
☒	alyssasolo	Alyssa Solomito	2 View Details	☒ Approver	☐ View Only	☒ Only this Catalog	☐ Requires Approval	☒ User Default
☒	BDONEW2025	BDO Kelly	2 View Details	☒ Approver	☒ View Only	☐ Only this Catalog	☐ Requires Approval	☐ User Default