# How To: Manage Materials



By C-Ware, Ind



## **Table of Contents**

How to Manage Materials	1
Table of Contents	2
How to Create New Materials	3
How to Change Material Settings	5
How to Add Pictures	6
How to Add and Edit Plant Facts	7
How to Add and Edit Categories	9



## How to Create New Materials

1) Select the "Materials" button in the top menu.



2) Click green plus icon to add a new material.



3) Fill in the botanical and common names. Make sure to check "Name Suggestions" for faster entry.

Add Material	
Botanical	(R) TM
Common	
Abbreviated	💶 🗹 Auto fill
Grouping 1	Auto fill with genus
Grouping 2	Auto fill with specie
Grouping 3	Auto fill with variety
Grouping 4	Auto fill with cultivar
lame Suggestions	
Botanical	Common

4) Repeat steps two and three for all plants. Using the copy button may be faster.

5) Once all plants have been entered into "Materials" they will be automatically

populated into inventory with a <No Attribute> inventory item.



6) You may also import your material list by using the Material Import Sheet as a guide on the Tutorials page here: https://www.plantx.net/tutorials.html

👂 Exemplar I	Nursery PlantX Grower
Action View	Material Window Help
🔁 Customers	Print Material Listing
🛃 Materials	Print Material Facts
Materials	Create Initial Catalog Items
÷ • Abelia	Batch Change
🕂 🖶 Achillea	Import



# How to Change Material Settings

- 1) Select a Material from the list on the left.
- 2) Click on the settings tab on the right.
- 3) Adjust settings according to company needs.



- I) Publish: To publish a material means to show on the catalog page of the website.
- Feature on website: This enables a special banner to be shown on your website.
   \*Make sure to double check with C-Ware that this is activated for your website.
- III) Hide: We recommend to never delete anything from PlantX. Instead, the hide feature will hide the plant from your material list. It will also hide all inventory supplies, unpublish from the website, and remove from being featured on the website.

IV) Tag Color: If your company uses colored tags for different materials, you can input that here.

- V) Patent information can also be added during this step.
- 4) Click Apply button on the bottom right to apply your changes.



## How to Add Pictures

1) Pictures are used for your website, tags, and some reports. To add a photo, select the Pictures tab.

Action View Material Window Help				
🚵 Customers 🏨 Materials 🗰 Inventory 🎬 Orders 🕎 Trucks 🔛 Sort Email 🚔 Reports 👟 Add Report				🖾 👘
🛃 Materials				- # X
Search Botanical or Common		Name Plant Facts Pictures Categories	Settings	
Naterial    Bodia y grandfora   Could a y grandfora (Could of "" (Count of Could of	* <b>-</b> × • H	Pchre	Caption Caption: Keywords: Source: Abele x grandifors "Edward Gouther" jag	Published Published

- 2) Select the green plus button on the right-hand side.
- 3) A smaller window will pop up giving you the option to upload your new picture.
  - I) Add picture from disk: This allows you to choose a photo from your computer.
  - II) Add from existing pictures: This allows you to choose a photo from photos
  - already uploaded to PlantX.

aa Picture	

4) Photos are automatically published to your website, to hide the photo from your website, select the photo and click the green check mark on the right-hand side.

Name Plant Facts Pictures Categories Settings			
Picture	Caption	Published	Q
			H
a state and a state of the stat		<b>→</b>	- 1
	Caption: Keywords:		-
	Source: Abelia x grandiflora 'Edward Goucher'.jpg		120

5) If you have multiple photos for one plant, you can change the order they show up on the website by clicking and dragging the pictures into the order you want.

6) You can also send a picture directly to the web gallery using the green arrow.



## How to Add and Edit Plant Facts

1) Plants facts show up on your website and are used for tags. Select Plant Facts on the right-hand side of the screen.

Fact 🛉	Particular
Description	Beautiful, semi-evergreen shrub with gracefully arching branches. Small, bell-shaped, lilac-pink flowers; leaves turn bronzy in fall. Useful in a border planting, divider or informal hedge. Full to partial sun. Moderate grower up to 5 feet tall and 6 feet wide!
Sun	Partial Sun
Growth Rate	
Mature Height	
Mature Spread	5'
Zone	Zone 2-6
Water	Minimal
Foliage	Green
Flower	
Deer Resistant	No
Tag Desc	Semi-everareen shrub.

2) Double click on a fact to edit it.

3) To add more facts, or to add fact presets, click the Action menu, then select Maintain, then Material Facts.

	VIEW IVIC	aterial win	dow	Help
C	ustomers laterials	F4	ve	ntory <sub></sub> Orders 📘 Truc
In	venton	E8		
0	-days	50		
0	rders	F9		
C	rops	F3		
Tr	ucks		ar	d Goucher'™ (Edward Gouch
Lo	bads			
Su	upplies			Admin Settings
Lo	ocations	F6		Member Settings
0	rder Items			Users and Apps
A	llocations			My Profile
Pi	ictures			Email Manager
Pi	icture Assig	gnment		Attributes
W	/eb		>	Sales Reps
R	enorts	F11		Taxes
Δ	dd Renort	F12		Chart of Accounts
0	at Email	112		Payment Terms
				Categories
La	ibeis		-	Catalog Item Types
D	ocuments		Г	Material Facts
St	atements			Mail Templates
M	laintain		>	Local Settings



4) Here you can select the facts you would like to show on your website and add new facts.

5) Click the green plus to add a new fact.

Action Window Help		
陷 Customers 🔮 Materials 虪 Inventory 🚰 C	Orders 🧮 Trucks 🛅 Sort Email 🚔 Reports 🔩 Add Report	
🛃 Material Facts		
Fact Name	Publish	Ŧ
Description		
Sun		
Growth Rate		1,2
Mature Height		-2
Mature Spread		

6) Enter the fact name on the smaller pop-up window (i.e. Growth Rate, Mature Height, Zone, etc) then push OK.

Add Fact		×
Fact Name		
OK	Cancel	

7) Your new fact will automatically be published to the website, to unpublish uncheck the publish box.

8) To give fact options (i.e. partial sun/full sun, zone A/zone B), enter different options in the presets box, only one option per line.

Description	
Publish	
Option 1 Option 2	123
	Description Publish Option 1 Option 2

- 9) Push Apply when all changes are done.
- 10) Repeat steps 5 through 9 with new plant facts.
- 11) You may also import your material list by using the Material Import Sheet as a

guide on the Tutorials page here: https://www.plantx.net/tutorials.html



## How to Add and Edit Categories

1) Categories are a way for you to group your plants. These categories are customizable examples include Rock Garden, Deer Resistant, Fruit Tree, etc. To add a plant to an existing category, select the plant from the materials list on the left, then click the Categories tab on the right.

Search Botanical or Common		Name Plant Facts Pictures Categories Settings		
Materials	^ _		Name	+
🖨 🖬 Abelia		•	Deciduous Trees	
🖻 🛢 grandiflora		•	Rock Garden	
Abelia x grandiflora 'Edward Goucher'** (Edward Goucher Glossy Abelia)			Fruit Trees	
🕀 🗰 Acer			l l l l l l l l l l l l l l l l l l l	
🛞 🗰 Achilea				
🛞 📾 Aeonium Decorum		× .		
🛞 🖷 Agave		•		
🛞 🗰 Alyssum		•		
🛞 🖷 Angelica				
🛞 🖷 Arctostaphylos		н.		
🛞 🔳 Asarum				
C Barbaria		w.		

- 2) Click the green plus button on the right to add more categories.
- 3) On the pop-up window select the categories you would like to add and push OK.

select c	ategories to add	
Select	Name	
	Shrubs	
	Annuals	
	Flowers	
		-

4) To remove a category from a plant, select the category you would like to remove and push the red minus sign on the right of the screen





5) To edit categories, click Action, then go to Maintain and then select Categories.



6) To add a new category, push the green plus button.

Name	+
Deciduous Trees	-
Rock Garden	
Fruit Trees	
Shrubs	
Annuals	4
Flowers	·



7) Enter the name of the new category (Rock Garden, Deer Resistant, Fruit Tree, etc.) in the smaller pop-up window.

Add Category			×
Name Category			
	OK	Cancel	

8) To delete a category, select the category you want to remove and push the red minus.

Name	+
Deciduous Trees	
Rock Garden	
Fruit Trees	+
Shrubs	-
Annuals	+
Flowers	

9) To add multiple plants to one category quickly, try selecting the category on the left side and then select the plants you would like to place into the category. Once all your plants have been selected push the green check mark to apply your changes.

			ē	×
Materials		Common		1
E Z All				1941
EV Genus Ab	bela de la constancia de l		_	×
□ □ □ Species g	grandiflora			
A. x g. 'Ed	Edward Goucher'	Edward Goucher Glossy Abelia		
EV Genus Ace	ter de la constant de			
pecies	campestre		_	
Acer camp	npestre	Hedge Maple		
E Species of	circinatum			
Acer circir	inatum	Vine Maple™		
E Species p	palmatum			
Acer pal.	'Crimson Queen'	Crimson Queen Japanese Maple		
Acer palm	natum	Japanese Maple	_	
Acer palm	natum 'Bloodgood'	Bloodgood Japanese Maple	_	
Acer palm	natum 'Butterfly'	Butterfly Japanese Maple	_	
Acer palm	natum 'Crimson Queen'	Crimson Queen Cutleaf Maple	_	
Acer palm	natum 'Red Emperor'	Red Emperor Japanese Maple		
Acer palm	natum 'Sango kaku'	Coral Bark Japanese Maple		
Acer palm	natum 'Shishigashira'	Lions Head Japanese Maple		
Acer palm	matum var. d. 'Tamukeyama'	Tamukeyama Laceleaf Japanese Maple	_	
Acer palm	matum var. diss. 'Garnet'	Garnet Laceleaf Maple	-	
Acer palm	natum var. diss. Viridis'	Green Japanese Laceleaf Maple	_	

