

**Display Unit Creation** 

Latest Version: R3 Upgrade September 2020





## **TABLE OF CONTENTS**

PREFACE	3
Login to PIM	4
DISPLAY UNIT CREATION USER INTERFACE	5
Required Attributes	6
Add Component Articles	9
Send to Merchant for Approval	11
DISPLAY UNIT CREATION EXCEL TEMPLATE	12
Required Attributes	13
Add Component Articles using the UI	17
Add Component Articles using Excel	17
Send to Merchant Multiple Display Units for Approval	21
APPENDIX 1: UPDATING DISPLAY UNITS SENT BACK FOR REWORK	23



### Purpose

This document outlines how to create a display unit using both the user interface (UI) and excel template.

### **Before You Begin**

Here's a step by step flow of the Display Unit Creation process:



Before you begin, please take note of the following:

- The icon indicates that an action is required. The icon is used to draw your attention to specific areas, however no action is required.
- If no action step is required and the information displayed is for your information only, a grey box will surround the text.
- For additional guidance in the UI, click on the information icon<sup>1</sup>.
   TIP: You will need to double click on the<sup>1</sup> for drop-down fields.
- Along the way, we will be providing tips such as the one above. To help you navigate these,

we will *italicize* the text and begin the tip with the following icon

\*NOTE: All article information in this manual is fictional and is used for training purposes only\*

### Login to PIM

- 1. Go to <a href="https://indigobm.riversand.com/">https://indigobm.riversand.com/</a>
- 2. Enter your Username and Password
- 3. Press 'Enter' or click on 'Log In'



Fig. 1 Login Screen

After successful login you will be taken to the Home page

÷	Indigo PIM	Q 🗹 🕜 🌲 i Migovendor1 Admin 🔻
۶	Home	
1 0 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	My To-Do's Last refreshed 2 minutes ago All tasks Created by Vendor Online Enrichment Workflow Article Update Workflow Disp Disp All tasks Rework More details > More details >	Task Progress Summary     Last refreshed now C       Type     Status     From Last       Entity Data Imports     All     2 Days       Q. Search     No batch tasks found
	Saved Searches 💭 🖓	
	Indigo PIM :: Release 2020	R3 :: Powered by #riversand

Fig. 2 Home

### \*Before you begin, ensure that the component articles are already created in PIM\*

## DISPLAY UNIT CREATION USER INTERFACE

## **Required Attributes**

1. Click on 🕐 (Quick Actions), then on Display Unit

ŧ	Indigo PIM					۹ (	👔 🌲 🤼 indigovendor3 Admin 👻
4	Quick Actions						
•	CREATE	Last refreshed 21 minutes ago 🞜	Task Progress Summar	у			Last refreshed 4 minutes ago 🧯
	Display Unit UPLOAD	<u> </u>	Type Asset Upload	Status All	From Last 7 Days	v	Q, Search
8	Upload Assets	Vendor Online Enrichment Workflow Article Update Workflow Display Unit C >		N	o batch tasks found	d	

Fig. 3 Quick Actions – Display Unit

2. Fill in the required attributes. Refer to the Data Dictionary for guidance.



**TIP:** Fill in fields from left to right, then move on to the next row.

3. Click on Create

The following message will appear: Display Unit Created

÷	<b>Indigo</b> PIM		Q 🕜 🌲 🚯 indigovendor3 Admi	in 🔻
۶	Create Display Unit		-	- ×
<b>↑</b> <b>€</b>		Basic Information	Finish	
Q 194	Vendor Name 🖲	UPC/EAN 0	Display Unit Name 🔍	
	Required Buyer Group <b>(</b> )	Required	Required	
	Required	0		

Fig. 4-1 Required Attributes

4. Click on Next

ŧ	Indigo PIM			Q 📀 🏚 🕼 ind	digovendor3 Admin 🔻
۶	Create Display Unit				- ×
<b>↑</b> <b>€</b>		Basic Info	rmation	Finish	Next
Q 8	Vendor Name  714664-XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX	•	UPC/EAN 0 882709202639	Display Unit Name   NOTEBOOK, MINI DOODLE ASSORTMENT	Update
	Buyer Group  Creativity - Winnie Sum, Emily Nelso x	•			
<u> </u>				Fig. 40 De su ins al A	the first stars

Fig. 4-2 Required Attributes

### 5. Click Show me the Display Unit

÷	Indigo PIM	Q 🕜 🌲 🕼 indigovendor3 Admin 🕶
۶	Create Display Unit	- ×
† ₽		Basic Information     Finish
Q 8		Display Unit processed
		☑ Take Me back to Where Is ☑ Show me the Display Unit ☑ Create one more
		Fig. 5 Show me the Display Unit

## 6. Click on Mandatory Vendor Attributes

NOTE: The Summary tab shows Display Unit business conditions that must be met. Indicates that the business condition has not been met. Once they have been met, the <sup>®</sup> will turn into a <sup>©</sup>.



Fig. 6-1 Mandatory Vendor Attributes

- 7. Fill in the remaining required attributes. Refer to the Data Dictionary for guidance.
- 8. Click on Save

The following message will appear: Data saved

÷	Indigo PIM				Q 🧿 🌲 🕼 indigovende	or3 Admin 🔻
۶	Manage Display Unit 🖾 882709202639				English - United States	s <b>* - x</b>
ŧ	Display Unit Name Indigo Store Retail Price NOTEBOOK, MINI DOODLE ASSORT	CA 🛈	Cost Price		o 🖍 🖬 🕌	±• 0
<b>P</b>	Summary Product US Item and Carton Component Articl	es Mandatory Ve	endor Att 🗴			<b>v</b>
9						Save
	Vendor Name  Vendor Name  Vendor S.R.L. x	•	UPC/EAN () 882709202639		Display Unit Name   NOTEBOOK, MINI DOODLE ASSORTMENT	
	Display Unit Length 🕼		Display Unit Width 🕖		Display Unit Height 🜒	
	Required	0	Required	0	Required	
	Consumer Package Length 🕖		Consumer Package Width 🕖		Consumer Package Height 🔍	
	Required	0	Required	0	Required	
	Display Unit/Package Measurement Unit 🜒	_	Display Unit Weight 🕕		Consumer Package Weight 🕕	
	Required	0	Required	0	Required	
	Display Unit/Package Weight Unit 🕕		Master Carton Quantity 🕖		Master Carton Length 🕖	
		•				
			Indigo PIM :: Release 2020 R1 :: Por	wered by <b>iriversand</b>		

Fig. 6-2 Mandatory Vendor Attributes

9. Click on the Summary tab, and click on \$\mathcal{C}\$ (refresh)
 The Mandatory Vendor Attributes will show a \$\log\$

mmary Product US Item and Carton	Component Articles 💌	Mandatory Vendor
Things I need to fix		<b>S</b>
Display Unit Created by Vendor		
<ul> <li>Mandatory Vendor Attributes</li> </ul>	·]	
Should Contain At Least One Component	· /	
General		
🗴 Contains At Least One Component		
<ul> <li>Mandatory Vendor Attributes for Rework</li> </ul>		

## Add Component Articles

Because each display unit must contain component articles, at least one component article must be added in order to approve and publish the display unit.

1. Click on Component Articles



Fig. 8-1 Component Articles

2. Click on More Actions, then on Add

ų	Indigo PIM		🔍 ? 🌲 🤼 indigovendor3 Admin 👻
4	Manage Display Unit 🕮 88	32709202639	🔄 English - United States 💌 🗕 🗙
	Display Unit Name  UNOTEBOOK, MINI DOODLE ASSORTMENT	ndigo Store Retail Price CA 0 Cost Price 0	50) × 11 + ±• 0
8	Summary Product US Item and Car	ton Component Articles	Workflow Recent Activity
	INFO	Last refreshed 6 minutes ago 0 - 0 / 0 COMPONENT QUA UPC VENDOR ARTICLE Add SP VENDOR COST PRI Create & Add SP	Display Unit Created by Vendor Workflow started at 03/19/2020 03:59:36 PM     O     Rework     Merchant Approval     Display Unit Creation     Massigned     Add a comment     Send for Merchant Approval

Fig. 8-2 Component Articles

- 3. Use the **Search bar** or **Filter** to search for and select which component articles to add to the display unit
- 4. select the UPCs you want to add as component articles
- 5. Click on Save

The following message will appear: Relationships saved

Add Relatio	nship - 882	709202639							×
Reset     Reset     Show "Article	202660 e" and _ANY=	<b>Filte</b> 882709202660	<b>•••</b> }		Last refreshed 2	minutes ago   1 selected	1-1/1 <b>1/2 10 </b> 🖌	Cancel	Save
✓ -	TH	UPC/EAN	VENDOR ARTIC	PIM HIERARCHY	BRAND	BUYER GROUP	ONLINE ITEM N	CREATED ON 🜩	
		882709202660	NOTEBOOK, 1 SUB	PIM Hierarchy>>F	D	Creativity - Winnie		03/19/2020 02:15	5:

Fig. 8-3 Component Articles

6. Click on 🖉 (edit) and add the Component Quantity for each component article

**NOTE:** The quantity should be an integer

7. Click on Save

The following message will appear: Relationships saved

4	Indigo PIM		🔍 🥐 🌲 🤖 indigovendor3 Admin 👻
4	Manage Display Unit 🛛 882709202639		📓 English - United States 💌 🗕 🗙
1 1 1 1 1	Display Unit Name I Indigo Store Retail Price CA I NOTEBOOK, MINI DOODLE ASSORTMENT	Cost Price 🔮	50) × th 7 ±- 8
8	Summary Product US Item and Carton Component Articles		Workflow Recent Activity
	Last refreshed no	w   1-1/1   Cancel More Actions V I E C C   Tabidar VENDOR ARTICLE VENDOR MSRP VENDOR COST PR	Display Unit Created by Vendor Workflow started at 03/19/2020 03:59:36 PM
	3	882709202660 NOTEBOOK, 1 SUBJE 12.95 2.18	<ul> <li>Rework</li> <li>Merchant Approval</li> <li>Display Unit Creation         <ul> <li>Unassigned</li> <li>Add a comment</li> </ul> </li> </ul>
			Send for Merchant Approval

Fig. 8-4 Component Articles

**NOTE:** You can click the **Product** tab to fill in additional attributes for the display unit that are not mandatory for display unit creation (and therefore are not covered under the 'Mandatory Vendor Attributes' business condition) but could benefit your reporting.

## Send to Merchant for Approval

- 1. Click on C (Refresh)
- 2. Click on the **Summary** tab
- 3. Now that all the business conditions are met (indicated by a <sup>(2)</sup>), click on **Send for Merchant Approval**

The following message will appear: Workflow action completed successfully

4	Indigo PIM				🔍 🕐 🌲 🚯 indigovendor3 Admin 🛩
۶	Manage Display Unit 🖾 882709202639				🕼 English - United States 🔻 🗕 🗙
1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	Display Unit Name  Indigo Store Retail Price CA NOTEBOOK, MINI DOODLE ASSORTMENT	Cost Pri	ce <b>0</b>		<u>(100</u> <b>m</b> ∓ ± (27
8	Summary Product US Item and Carton Component Articles 👻				Workflow Recent Activity
	Things I need to fix         Display Unit Created by Vendor         Image: Standard Contain At Least One Component         General         Image: Standard Contain At Least One Component         Image: Standard Contain At Least One Component	Ø :	Component Articles Component Articles (1)	Ø :	
	Things I can do No to-dos available for this entity			Ø 1	Send for Merchant Approval

Fig. 9-1 Send for Merchant Approval

4	Indigo PIM				🔍 🥐 🌲 🕼 indigovendor3 Admin 👻
۶	Manage Display Unit 🖾 882709202639				🔊 English - United States 💌 🗕 🗙
€ ₽ 0	Display Unit Name  Indigo Store Retail Price CA NOTEBOOK, MINI DODLE ASSORTMENT	Cost Pric	c <b>0</b>		100 to 7 ± - 3
8	Summary Product US Item and Carton Component Articles 👻				Workflow Recent Activity
	Things I need to fix         Display Unit Created by Vendor         Contains At Least One Component         General         Mandatory Vendor Attributes         Mandatory Vendor Attributes for Rework         Should Contain At Least One Component	Ø :	Component Articles Component Articles (1)	Ø:	Display Unit Created by Vendor Workflow started at 03/19/2020 03:59:36 PM     Rework     Merchant Approval     Add a comment     Approve and Publish
	Things I can do No to-dos available for this entity			Ø :	Send to Display Unit Creator  Display Unit Creation  Send for Merchant Approval® On 03/19/2020 0
				Fig. 9-2 Se	end for Merchant Approva

#### YOU HAVE SUCCESSFULLY CREATED A DISPLAY UNIT USING THE USER INTERFACE

# DISPLAY UNIT CREATION EXCEL TEMPLATE

## **Required Attributes**

1. Click on <sup>Q</sup> then 🔄 Search Thing Domain

Indigo PIM	Q 🗹 🥜 🌲 🚯 indigovendor1 Admin 👻
Home	
My To-Do's All tasks Search Search Control Online Enrichment Workflow Search Control Online Enrichment Workflow Control Online Enri	Task Progress Summary       Last refreshed 2 minutes ago 2         Type       Status       From Last         Entity Data Imports       ✓       All       ✓       2 Days       ✓         Q. Search       No batch tasks found       No batch tasks found       Image: Status im
Saved Searches	: Powered by <b>triversand</b>
inger in Recode 2020 Ro	Eig 10.1 Soor

- 1. Change Type to Display Unit
- 2. Click on **Apply**



Fig. 10-2 Search

3. Click on 千 (Upload)

i:	Indigo PIM			Q 🕜 🌲 🚺 indigovendor3 Admin 🕶
4	Search Thing Domain 🔻 @ Reset			🛐 English - United States 💌 🗕 🗙
•	Q Search 💿 🝸 Filter 🔻	f Type: Display Unit		_
<b>P</b>	show "Display Unit" sorted by Created On desc		Last refreshed 31 seconds ago   1 - 26 / 26 🗹 🗛	tions 🔽 🖻 🗊 🚡 🖢 😴 📋 Tabular 👻
Q	UPC UPC	DISPLAY UNIT NAME	BUYER GROUP	CREATED ON 🜩
9	<b>DU</b> 882709202639	NOTEBOOK, MINI DOODLE ASSORTMENT	Creativity - Winnie Sum, Emily Nelson, Patrycja Ka	03/19/2020 02:58:34 PM
		Display Unit for SOP 1	Journals - Maria Gomba , Jennifer Iseler	03/18/2020 04:52:47 PM
		Display Unit for SOP 2	Journals - Maria Gomba , Jennifer Iseler	03/18/2020 04:52:47 PM

#### 4. Click on Download

Upload Bulk Entities			×
	• Upload file	2 Finish	Next
	Download a ten	nplate	
	Drag & Drop fil Upload File	es here	
		 Fig. 12-	1 Download Template

Ç .

### 5. Click on **Download**

- TIP: There are no hierarchies to select when creating a Display Unit

Download smart excel template		×
Select 1 or more classifications to download the smart excel template. You can select the classification at any level and the data requi	red for all child classificatio	ns is
displayed in the template. You can also download the template without selecting the classification.	Select path for classifications	
	PIM Hierarchy	
Q, Search		
	•	Reset Search
0 classifications selected		
Baby & Kids		
Electronics		
▶ Experiences		
▶ Fashion		
▶ Gift Cards		
▶ Gourmet		
Health & Beauty		
Home & Office		
▶ Paper		
Temporary Fixtures		
Toys & Games		
Unclassified		
Cancel Download		
	E. 10.0 Day mile	a al Tana al

Fig. 12-2 Download Template

- 6. Open the excel spreadsheet, 'Enable Editing' and 'Enable Content'
- 7. Click on the 'Entities' tab
- 8. Fill in the template so that all mandatory attributes are filled in

**NOTE:** Leave Action, ID, and Name columns blank

**NOTE:** Ensure the fields have the correct formatting, as per the Data Dictionary

9. Save the template in your folder of choice so its ready for upload

	Α	В	С	D		E	F	G	Н	1	J	K	L	М	N	0	Р	Q	R	S	Т	U	V	W	Х	Y	Z	AA .	AB
1	System	Attribute	s				Matchin	1A-Ven	d 1B-Prod	luct Desc	ription		1C-Prod	uct Cate	gory				1D-Prod	uct Prici	ng			1E-Prod	uct Deta	ils			
2	Action	Туре			N	ame	UPC/EA	Vendor	Article	Season	Year	Origina	Buyer G	MCAT	Layout	Market	Layout	Tax Cod	Cost Pri	Cost Pri	i Indigo	Retail N	Is MAP	Product	Retail A	Retail C	Brand	Sub Brar Ret	turi
3																													
4																													
_																								E:	- 14		- L T -	e ve e ve L evi	<u> </u>

Fig. 13 Excel Template

wnload smart excel template		;
lect 1 or more classifications to download the smart excel template. You can select the classification at any level and the d splayed in the template. You can also download the template without selecting the classification.	lata required for all child classifications is Select path for classifications PIM Hierarchy	Ŧ
l, Search		
	Rese	t Search
) classifications selected		
Experiences Experiences Gurmet Health & Beauty Home & Office Paper Temporary Fixtures Toys & Games Unclassified		
Cancel Download		

11. Click on Upload File or drag and drop the file



Fig. 15-1 Excel Upload

### 12. To check that the upload was successful, click on Show task details

Upload Bulk Entities	×
- Upload file	Finish
Entitie: View the task status 12 区 Finish & Cic	e are created/updated using the uploaded file 9c0957-6fba-4db1-ac9c-20d82378fca4 in 'Task Details' page se 🗹 Upload more entities 🛛 😰 Show task details
	Fig. 15-2 Excel Upload

13. Click on Refresh. The Processing Details pie chart should be green, and the Sub-details pie chart should be blue.

**NOTE:** If Processing Details appears red, indicating an error, click on the word 'error' to investigate and make necessary changes.



You can add component articles by either using the UI or excel. Follow 1 of the 2 options below:

## Add Component Articles using the UI

1. Click on the Success Detail tab and click on the first UPC.

**NOTE:** You'll need to add components separately to each display unit. Start by clicking the first UPC in the list below and follow the <u>Add Component Articles</u> instructions (pg. 9-10). To add components to the next display unit, come back to the screen below, click on the next display unit and repeat the <u>Add Component Articles</u> steps. Repeat until component articles are added to all display units in the list.

÷	<b>Indigo</b> PIM					Q 🗹 🕜 🌲 🕼 indiga	ovendor1 Admin 🔻
۶	Task Detail Entit	y Data Imports Completed					- ×
•	File Name Test_data.xlsm	Task ID e65fab91-39c4-457e-8767-e	Profile Name sys_import_data_excel_ui_ta	Task Status Completed			
Q	Start Time 08/12/2020 08:58:36 AM	End Time 08/12/2020 08:58:40 AM	Submitted by indigovendor1 Admin	Total Records 8			± 5
8	Summary Success Detail	Errors/Messages Related Tasks 🔻					
	Processing Details		Sub-details			Related Tasks	c
	Success (8)		Create (8) Update (0)			🄀 Parent Tasks (0) 🛛 🔆 Child Tasks (0)	
	<ul> <li>Error (0)</li> </ul>	100%	<ul> <li>Delete (0)</li> </ul>	100%			
	<ul> <li>Ignore (0)</li> </ul>		No Change (0)		- 14		

Fig. 16 Processing and Sub-details charts

### **2** Add Component Articles using Excel

- 1. Have handy the UPC numbers of the component articles you want to add to the display unit (i.e. copy onto a notepad or blank excel sheet)
- 2. Click on Q then search Thing Domain to get to the Search Page.
- 3. Change Type to Display Unit
- 4. Click on Apply

Searc	<b>ch</b> Thing	) Domain 💌			
Q Search		$\overline{\bigcirc}$	<b>Y</b> Filter <b>v</b>	be: Article	
show "Articl	l <b>e</b> " sorted by C	reated On <i>desc</i>		Q Search	
- ▼	TH	UPC/EAN	VENDOF	Article	
		882709202660	NOTEB	Display Unit	
		8827096202666	NOTEB		
		882709202653	NOTEB		
		882709202646	NOTEB	Close Apply	
		882709616702	NOTEB		

Fig. 17 Search

- 5. Search for the display units to add component articles to by either copying and pasting the Display Unit UPCs in the Search bar or filtering using **Filter**
- 6. Select the UPCs of the Display Units to add component articles to
- 7. Click on  $\stackrel{1}{2}$  (download) and **Download in Excel**

ŧ	Indigo!	PIM			🔍 🥐 🌲 🚺 indigovendor3 Admin 👻
(4)	Search	Thing Domain 🔻 🛯 Reset			🔄 English - United States 🔻 🗕 🗙
•	Q, Search		Type: Display Unit		
<b>_</b>	show "Display U	nit" sorted by Created On desc		Last refreshed now 2 selected 1 - 29 / 29 🗹 Ac	tions 🔽 🖻 🗊 🚡 🛨 😴 🛛 Tabular 👻
Q		UPC	DISPLAY UNIT NAME	BUYER GROUP	CREATE Download in Excel
0		882709202622	NOTEBOOK, MINI DOODLE ASSOTMENT	Creativity - Winnie Sum, Emily Nelson, Patrycja Ka	03/19/20 Download in CSV
		882709202622	NOTEBOOK, MINI DOODLE ASSORTMENT	Creativity - Winnie Sum, Emily Nelson, Patrycja Ka	03/19/2020 07:48:20 PM
		882709202639	NOTEBOOK, MINI DOODLE ASSORTMENT	Creativity - Winnie Sum, Emily Nelson, Patrycja Ka	03/19/2020 07:42:23 PM

8. Fig. 18-1 Download

### 9. Click on Download All

nload E	Bulk Entities - 2 entities			_	
					Download All Download
uick Se	elect				+ Create new or edit 🞜
avorit	My Scope Selection(s)	Shared Scope Selecti			
			No favorites		
- Soloo	at attributos				
<ul> <li>Select</li> <li>Avail</li> </ul>	ct attributes		Selected		Include All
<ul> <li>Select</li> <li>Avail</li> </ul>	ilable	GROUP	Selected	GROUP	Include All
<ul> <li>Select</li> <li>Avail</li> </ul>	Iable NAME Q	GROUP	Selected NAME Q	GROUP	Include All
Avail	lable NAME Q Display Name	GROUP Q Basic	Selected NAME Q	GROUP	Include All
Selec     Avail	Iable NAME Q Display Name Identifier	GROUP Q Basic Basic	Selected NAME Q	GROUP	Include All
Selec     Avail	Iable NAME Q Display Name Identifier 1st Battery Quantity	GROUP Q Basic Basic 58-Battery Information	Selected NAME Q C C C	GROUP	Include All

Fig. 18-2 Download

10. You can click on **Show task details** (then click on the File Name hyperlink to open the excel spreadsheet) or click on **Finish & Close** (the excel spreadsheet will download when its ready)

Download Bulk Entities - 2 entities	×
Initiated download, file would be automatically downloaded once ready	
Show task details Finish & Close	
	Fig. 18-3 Download

- 11. Open the excel spreadsheet, 'Enable Editing' and 'Enable Content'
- 12. To add the component articles, click on the Relationships tab
- Fill in Type using the dropdown, copy and paste ID from the Entities tab, add the UPCs of the component articles (that you searched/copied in step 1), and add Component Quantity

	A	В	С	D	E	F	G
1	System	n Attributes				RelTo Attribute(s)	Internal
2	Actior	Туре	ID	Name	Related to Type	UPC/EAN	<b>Component Quantity</b>
3		displayunit@@Component Articles	ersUH2e9CNJuvMc	88888888888123	article	9999919986820	3
4		displayunit@@Component Articles	ersUH2e9CNJuvMc	8888888888123	article	9999957747568	5
5							
6							
7							

Fig. 19 Excel Template - Component Articles

- 14. Save the template in your folder of choice so its ready for upload
- 15. Click on 🕈 (upload)

4	!nd	igo PIM		Q 🕜 🌲 🚯 indigovendor3 Admir	•
4	Sear	ch Thing Domain 🔻 🛚 Reset		🕞 English - United States 🔻 🗕	×
•	Q, Search	n 💿 🔽 Filt	er 🔻 📕 Type: Display Unit		
2	show 'Disp	olay Unit" sorted by Created On desc		Last refreshed 34 seconds ago   1 - 29 / 29 🗹 Actions 🔻 🗹 🛍 🛍 🖬 🛃 🖛 🖢 🛪 🖉   Tabular	Ŧ
Q		UPC	DISPLAY UNIT NAME	BUYER GROUP CREATED ON 🗘	
		882709202622	NOTEBOOK, MINI DOODLE ASSOTMENT	Creativity - Winnie Sum, Emily Nelson, Patrycja Ka 03/19/2020 07:57:55 PM	T
-		00	NOTEBOOK, MINI DOODLE ASSORTMENT	Creativity - Winnie Sum, Emily Nelson, Patrycja Ka 03/19/2020 07:48:20 PM	
		00	NOTEBOOK, MINI DOODLE ASSORTMENT	Creativity - Winnie Sum, Emily Nelson, Patrycja Ka 03/19/2020 07:42:23 PM	
	□ (	882709202639	NOTEBOOK, MINI DOODLE ASSORTMENT	Creativity - Winnie Sum, Emily Nelson, Patrycja Ka 03/19/2020 02:58:34 PM	
		00	Display Unit for SOP 1	Journals - Maria Gomba , Jennifer Iseler 03/18/2020 04:52:47 PM	
	0 (	00	Display Unit for SOP 2	Journals - Maria Gomba , Jennifer Iseler 03/18/2020 04:52:47 PM	Ľ

Fig. 20-1 Upload

16. Click on Upload File or drag and drop the file

Upload Bulk Entities	×
• Upload file	Finish Next
Downloa	a template
	<b>↑</b> 1
Drag & Dr Upt	op files here ad File

Fig. 20-2 Upload

17. To check that the upload was successful, click on Show task details

Upload Bulk Entities	×
• Upload file Finish	
Entities are created/updated using the uploaded file View the task status 129c0957-6fba-4db1-ac9c-20d82378fca4 in 'Task Details' page	

18. Click on Refresh. The **Processing Details** pie chart should be green, and the **Sub-details** pie chart should be orange.

**NOTE:** If Processing Details appears red, indicating an error, click on the Errors/Messages tab to investigate and make necessary changes.

:	Indigo PIM				Q 🗹 💡 🌲 🔥 indig	ovendor1 Admin 🔻
4	Task Detail Entity D	ata Imports Completed				- ×
<b>a</b>	File Name ef29ddbb-b151-41a4-bfce-6b	Task ID 6ee0108e-9886-4ba0-8c1d-5	Profile Name sys_import_data_excel_ui_ta	Task Status Completed		<b>.</b> C
Q	Start Time 09/28/2020 03:00:58 PM	End Time 09/28/2020 03:00:59 PM	Submitted by indigovendor1 Admin	Total Records 5		⊻ Đ
9	Summary Success Detail Error	s/Messages Related Tasks 💌				
	Processing Details		Sub-details		Related Tasks	S
	<ul> <li>Success (5)</li> <li>Processing (0)</li> </ul>		<ul> <li>Create (0)</li> <li>Update (5)</li> </ul>		Parent Tasks (0) X Child Tasks (0)	
	<ul> <li>Error (0)</li> <li>Ignore (0)</li> </ul>	100%	<ul> <li>Delete (0)</li> <li>No Change (0)</li> </ul>	100%		
		_	• No onunde (d)		Fig. 01 Brocossing and a	wh dataila

Fig. 21 Processing and sub-details

Fig. 20-3 Upload

## Send to Merchant Multiple Display Units for Approval

- 1. Click on to get to **Home**
- 2. Click on Display Unit Created by Vendor
- 3. Click on More Details under Display Unit Creation
- 4. Click on **Ready for transition**

ŧ	Indigo PIM	Q 🕜 🌲 🕼 indigovendor3 Admin 🕶
4	Home	
<b>a</b>	My To-Do's Last refreshed 3 hours ago  All tasks  Enrichment Workflow Article Update Workflow Display Unit Created by Vendor Update D >	Task Progress Summary         Last refreshed now C           Type         Streas         From Last           Entity Data Imports         ¥         All         ¥         7 Days         ¥         Q. Search
9	11         Display Unit Creation         Hide details +           2 Ready for transition         9 Mandatory Vendor Attributes         8 Should Contain AI Least One Component	66974019-6a9a-457e-82         03/20/2020 11:20:27 A         indigovendor3@riversand.com           COMPLETED         Total 2 record(s) submil         View Details           66974019-6a9a-457e-82         03/20/2020 11:00:24 A         indigovendor3@riversand.com           COMPLETED         Total 2 record(s) submil         View Details           COMPLETED         Total 2 record(s) submil         View Details
	Rework     More details >	Components f81741a7 03/19/2020 09:42:35 P indigovendor3@riversand.com COMPLETED Total 2 record(s) submi View Details

Fig. 22-1 Send for Merchant Approval Multiple

- 5. select only the Display Units you created/ want to publish
- 6. Click on Actions -
- 7. Click on Workflow Transition

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4	Searc	n Thing Domain 👻 🛯 Res	set		🕞 English - United States 🔻 🗕 🕽	c
t	Q *8827092	02677" or "882709202622"	🍸 Fliter 🔻 🐺 Type: Display Unit			
2	show "Display	Unit <sup>®</sup> Pending Display Unit Created	by Vendor Display Unit Creation and _ANY="882709202677" or "8827092026	52 Last refreshed 2 minutes ago 2 selected	1-2/2 🗹 Actions 🔻 🎤 🔀 🔀 🛪 💋 Tabular 🗸	
Q	<b>2</b> •	UPC	DISPLAY UNIT NAME	BUYER GROUP	BASIC	
	•	882709202677	NOTEBOOK, MINI DOODLE ASSORTMENT	Creativity - Winnie Sum, Emily Nelson, Pat	Copy :01:10 PM	
	•	882709202622	NOTEBOOK, MINI DOODLE ASSORTMENT	Creativity - Winnie Sum, Emily Nelson, Pat	Snapshots :57:55 PM	
<b>'</b>					Compare	
					ASSIGNMENTS	
					Release Task	
					Reassign Task	
				ſ	TRANSITIONS	
				l	Workilow mansition	

Fig. 22-2 Send for Merchant Approval Multiple

8. Click on Send for Merchant Approval

Workflow Transition - Display Unit Created by Vendor - Display Unit Creation - 2entities		×
Workflow Transition	2 Finish	Next
		Send for Merchant Approval
Add a comment		

Fig. 22-3 Send for Merchant Approval Multiple

9. Click on Finish & Close

Workflow Transition - Display Unit Created by Vendor - Display Unit Creation - 2entities	×
Workflow Transition	2 Finish € Finish & Close
	Fig. 22-4 Send for Merchant Approval Multiple

**NOTE:** If some of the display units failed to publish due to some business criteria not being met, you will receive a failure message. For these articles, search for the UPC, correct the errored business condition and republish.

	Workflow Transition	Finish	
ID	MESSAGE	DETAILS	Finish & Close
ICRloCWgQOGF2cf2SUyU0w DpbpqTL4S36Y316FrMMnNA	"Workflow" success Workflow not successful du	e to failed business c Should Contain At Least One Component	

### YOU HAVE SUCCESSFULLY CREATED A DISPLAY UNIT USING THE EXCEL TEMPLATE

## **APPENDIX 1: UPDATING DISPLAY UNITS SENT BACK FOR REWORK**

If the display unit(s) you submitted require rework, the Merchant will send it back to you, accompanied by an email indicating which UPCs to rework.

- 1. Click on the <sup>1</sup> to get to **Home**
- 2. Click on Display Unit Created by Vendor
- 3. Click on More Details under Rework
- 4. Click on Ready for transition or Mandatory Vendor Attributes

**Ready for transition:** Articles will appear here if the attribute requiring rework was filled in with the correct format but incorrect value.

**Mandatory Vendor Attributes:** Articles will appear here if the Merchant removed incorrect attribute inputs before sending it to you for rework.

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4	Home							
	My To-Do's Last refreshed 4 minu All tasks •	rtes ago 💋 play Un 义	Task Progre <sub>Type</sub> Entity Data In	ess Summar nports v	y Status All	From Last 7 Days	Ŷ	Last refreshed 4 minutes ago 2
8	10 Display Unit Creation More	e details »	×	Vendor Disp COMPLETED	play Unit Exc	03/20/2020 02:01:08 F Total 1 record(s) subm		indigovendor3@riversand.com View Details
	Rework     Ready for transition     O Mandatory Vendor Attributes for Rework	e details »	×	669740f9-6 COMPLETED	a9a-457e-82	03/20/2020 11:20:27 A Total 2 record(s) subm	L i	indigovendor3@riversand.com View Details
			×	669740f9-6 COMPLETED	a9a-457e-82	03/20/2020 11:00:24 A Total 2 record(s) subm	L i	indigovendor3@riversand.com View Details
	Saved Searches	g	×	Component COMPLETED	ts f81741a7	03/19/2020 09:42:35 F Total 2 record(s) subm		indigovendor3@riversand.com View Details
	Favorites My Search Shared Search Results		×	Component COMPLETED	ts f81741a7	03/19/2020 09:41:07 F Total 2 record(s) subm	 i	indigovendor3@riversand.com View Details
	No favorites		×	Vendor Disp COMPLETED	play Unit Exc	03/19/2020 08:57:55 F Total 1 record(s) subm	 	indigovendor3@riversand.com View Details
				Vendor Dis	play Unit Exc	03/19/2020 08:48:07 F	_	indigovendor3@riversand.com
	Indigo PIM ::	Release 2020 R1	:: Powered by	: riversa	nd			

Fig. 23 Home – Rework

5. Click on the **UPC** of the Display Unit you'd like to rework

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4	Search Thing Domain 👻			🌆 English - United States 💌 🗕 🗙
•	Q Search 💿 🍸 Filter 🔻	Type: Display Unit		
P	show "Display Unit" Pending Display Unit Created by Vendor Rework - Re	ady for transition	Last refreshed now   1 - 1 / 1	🗹 Actions 🔻 💉 🏠 🔣 👻 🗲 🛛 Tabular 👻
Q	UPC UPC	DISPLAY UNIT NAME	BUYER GROUP	CREATED ON
	882709202615	NOTEBOOK, MINI DOODLE ASSORTMENT	Creativity - Winnie Sum, Emily Nelson, Patrycja Ka	03/19/2020 02:58:34 PM

Fig. 24 Search Page

- Go to the Workflow tab and click on Merchant Approval to view the comment that indicates which attribute(s) require rework
   E.g. Of comment: "Change the display unit dimensions"
- 7. Click on either the tab (**Product** or **Item and Carton**) that the attribute to rework is in, or click on **Mandatory Vendor Attributes for Rework** on the Summary tab

4	Indigo PIM	🔍 🥐 🌲 🚯 indigovendor3 Admin 👻
۶	Manage Display Unit 🖾 882709202615	🔄 English - United States 🔻 🗕 🗙
€ ₽ 0	Display Unit Name  Indigo Store Retail Price CA Cost Price NOTEBOOK, MINI DOODLE ASSORTMENT	100 1 7 2 7 3
9	Summary Product US Item and Carton Component Articles	Workflow Recent Activity
0	Things I need to fix     Image: Component Articles     Image: Component Articles       Display Unit Created by Vendor     Image: Component Articles     Image: Component Articles       Image: Contains AL Less One Component     Image: Component Articles     Image: Component Articles       Image: Contains AL Less One Component     Image: Component Articles     Image: Component Articles	Display Unit Created by Vendor Workflow started at 03/19/2020 03:59:36 PM     Rework     Linassigned     Add a comment     Send for Merchant Approval
	Things I can do     CI       No to-dos available for this entity     CI	Delete     Merchant Approval     merchant3@riversand.com     "Send to Display Unit Creator on     02/20/220 02:3706 FM with     the comment Change DU unit     dimensione     Display Unit Creation

Fig. 25 Merchant Comment

8. Edit the attribute to the correct value



9. Click on Save

The following message will appear: Data saved

- 10. Click on  $\mathcal{C}$  (refresh)
- 11. Under the **Workflow** tab, add a comment if you'd like and click on **Send for Merchant Approval**. The following message will appear: **Workflow action completed**



Fig. 26 Send for Merchant Approval

**NOTE:** Rework for Display Units must be done using the UI only