

PIM TRAINING DOCUMENT

USER: VENDOR

Display Unit Creation

Latest Version: R3 Upgrade September 2020



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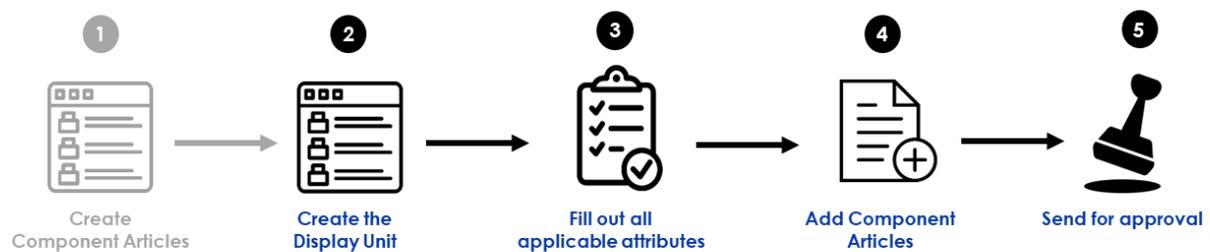
PREFACE

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  .
TIP: You will need to double click on the  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 <https://indigobm.riversand.com/>
2. Enter your **Username** and **Password**
3. Press **'Enter'** or click on **'Log In'**

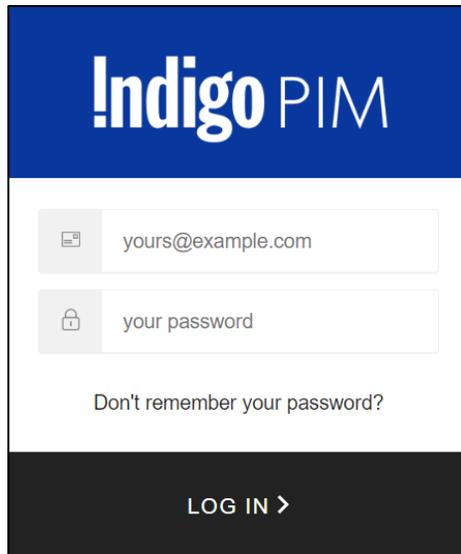


Fig. 1 Login Screen

After successful login you will be taken to the **Home** page

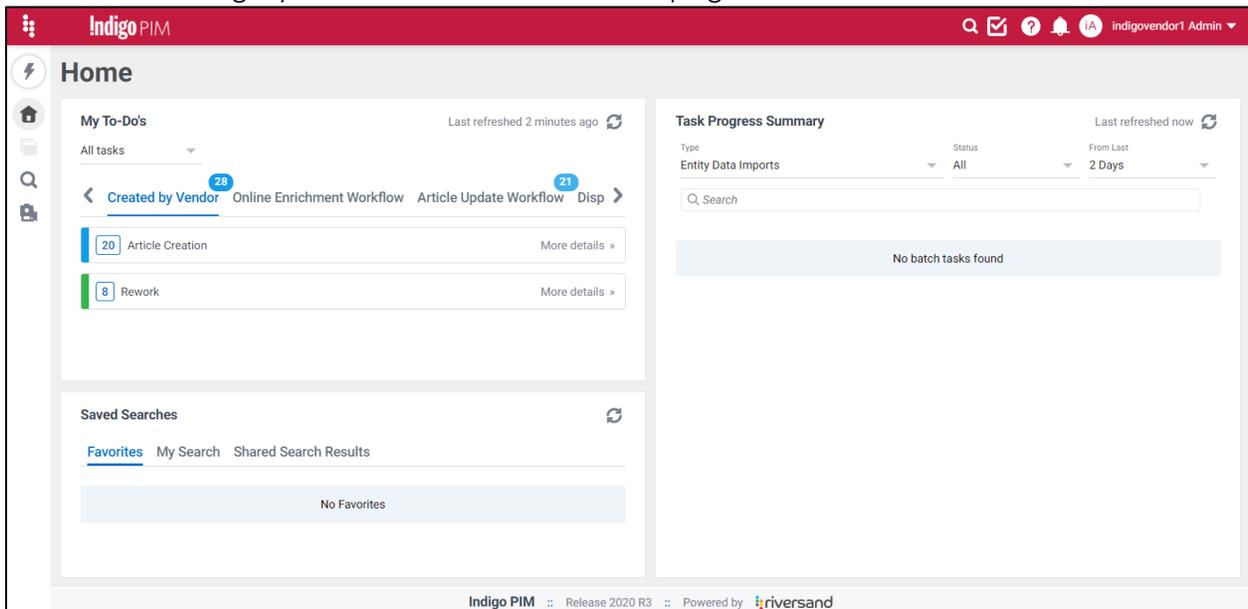


Fig. 2 Home

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**

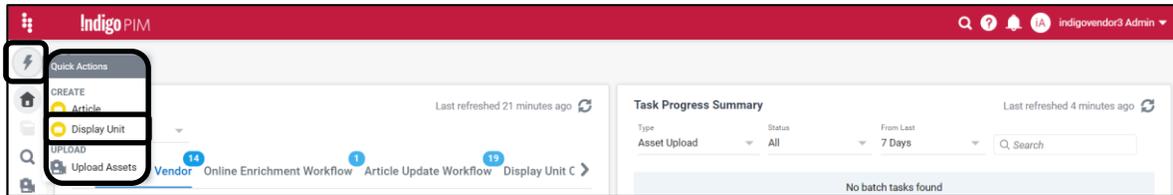


Fig. 3 Quick Actions – Display Unit

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**

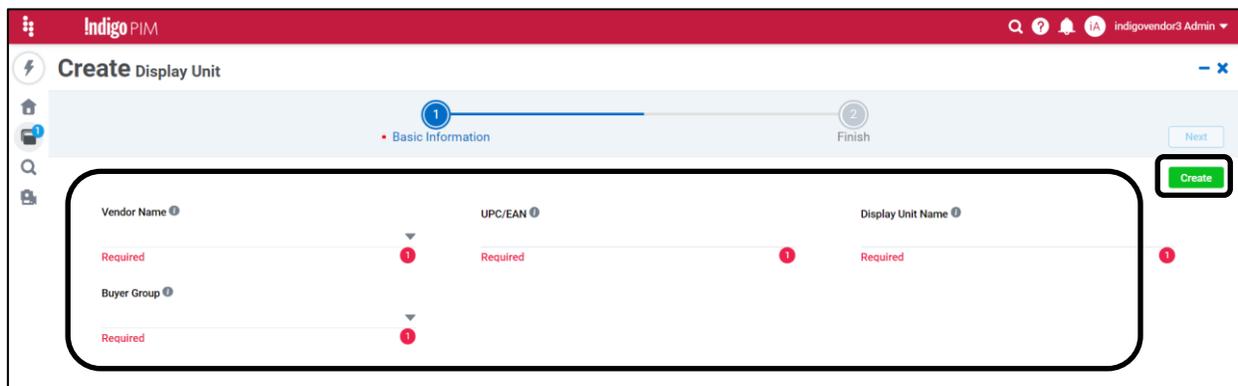


Fig. 4-1 Required Attributes

4. Click on **Next**

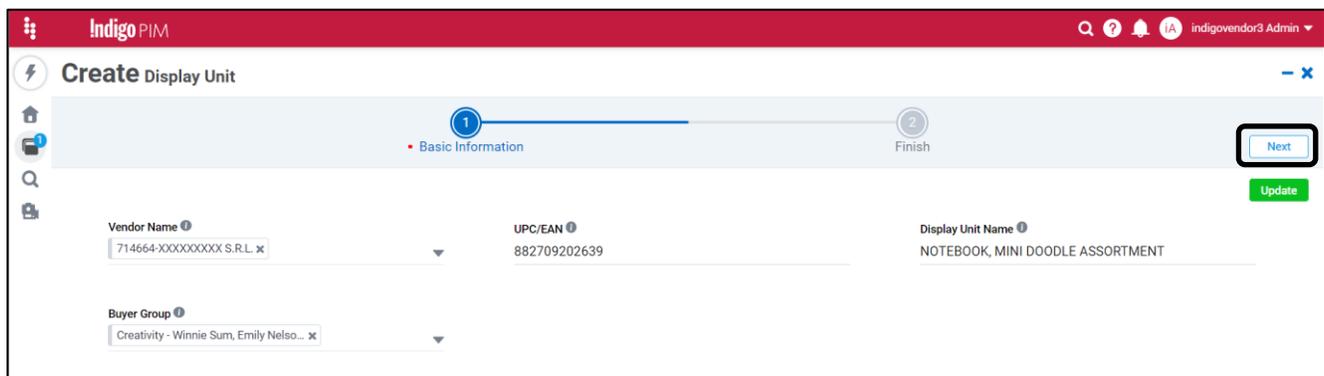


Fig. 4-2 Required Attributes

5. Click **Show me the Display Unit**

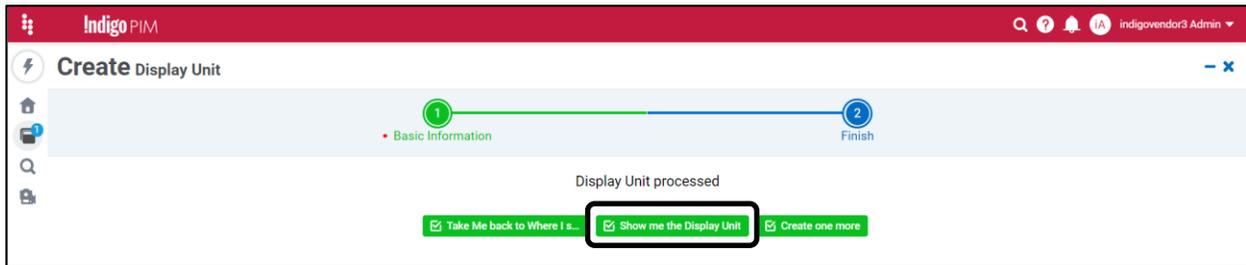


Fig. 5 Show me the Display Unit

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 ✖ will turn into a ✔.

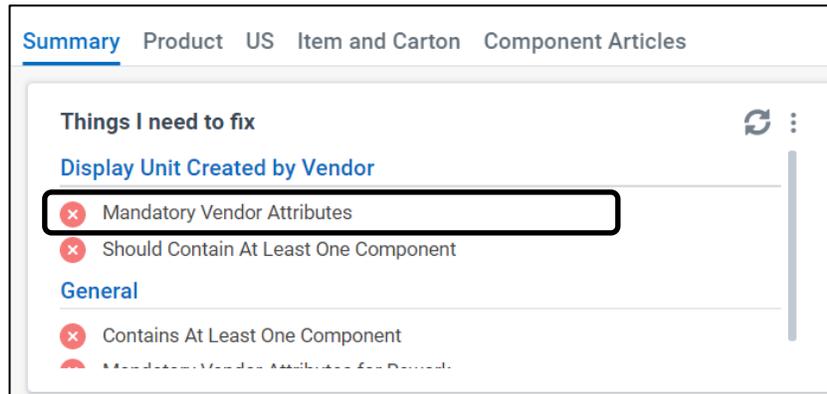


Fig. 6-1 Mandatory Vendor Attributes

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**

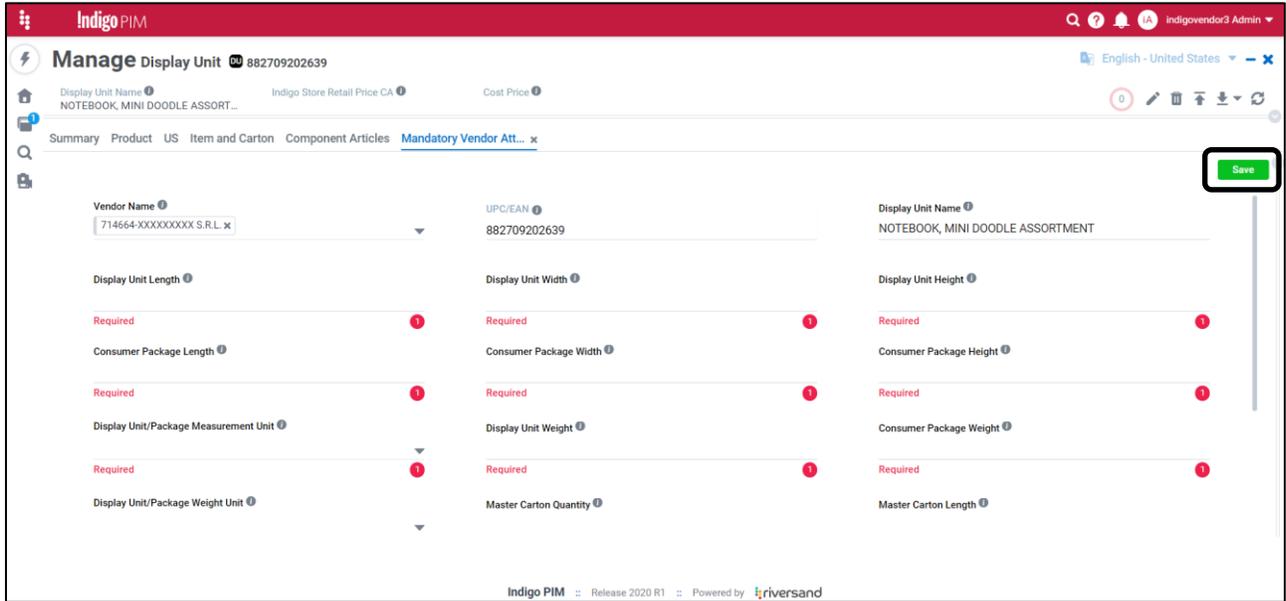


Fig. 6-2 Mandatory Vendor Attributes

9. Click on the **Summary** tab, and click on  (refresh)
The **Mandatory Vendor Attributes** will show a 

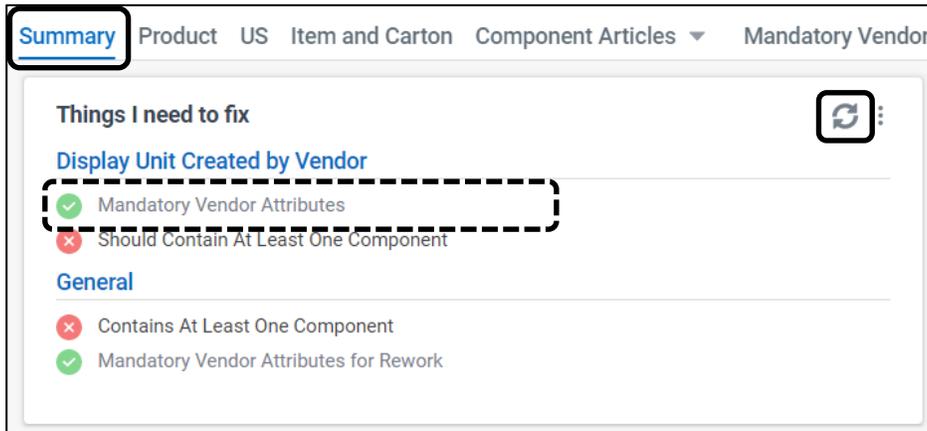


Fig. 7 Refresh

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**

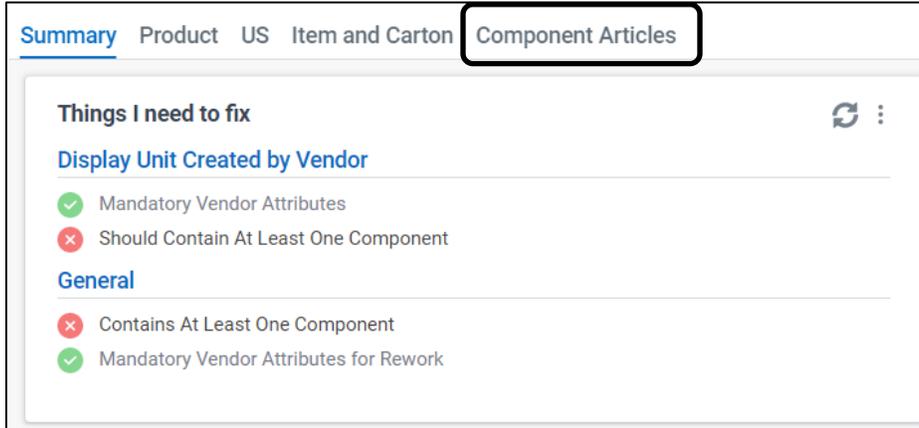


Fig. 8-1 Component Articles

2. Click on **More Actions**, then on **Add**

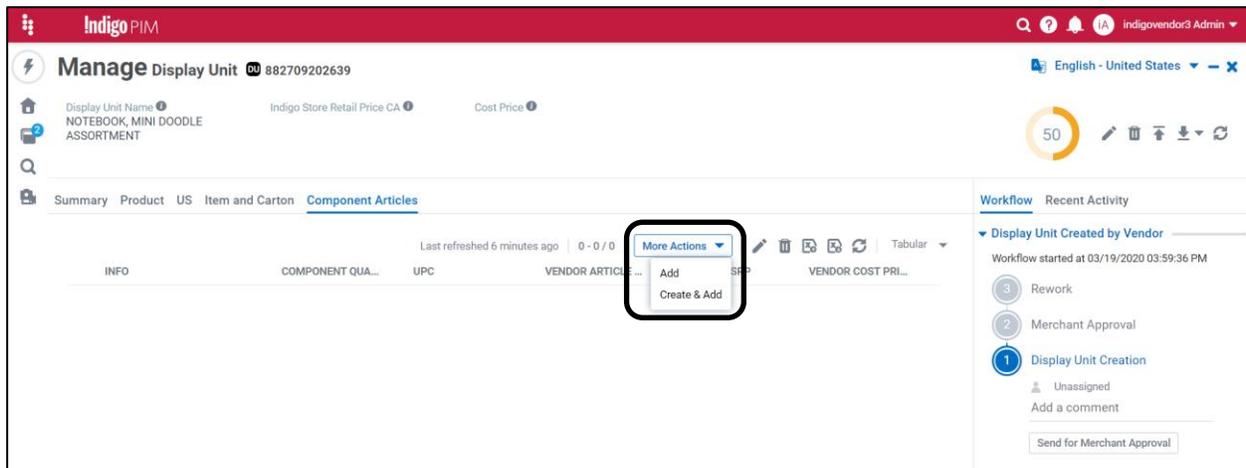


Fig. 8-2 Component Articles

- Use the **Search bar** or **Filter** to search for and select which component articles to add to the display unit
- select the UPCs you want to add as component articles
- Click on **Save**
The following message will appear: **Relationships saved**

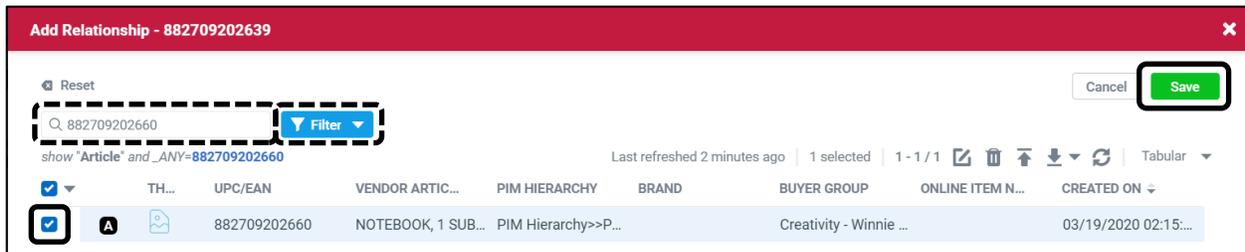


Fig. 8-3 Component Articles

- Click on  (edit) and add the **Component Quantity** for each component article
NOTE: The quantity should be an integer

- Click on **Save**
The following message will appear: **Relationships saved**

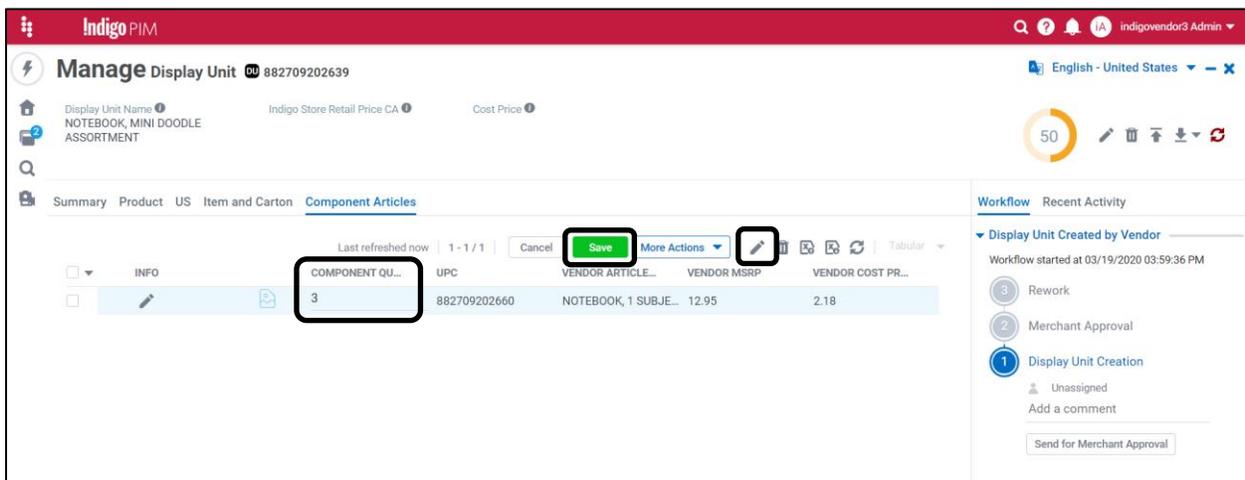


Fig. 8-4 Component Articles

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

The following message will appear: **Workflow action completed successfully**

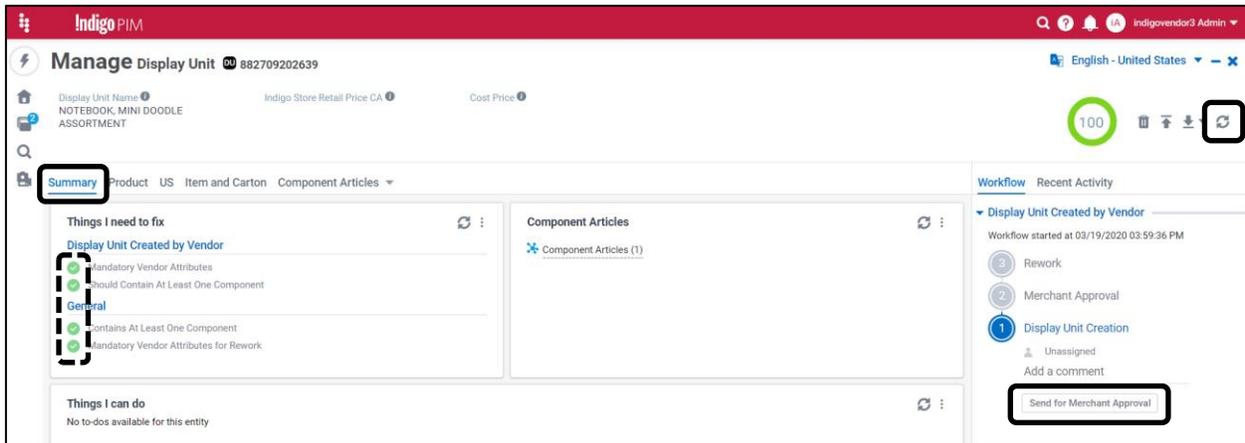


Fig. 9-1 Send for Merchant Approval

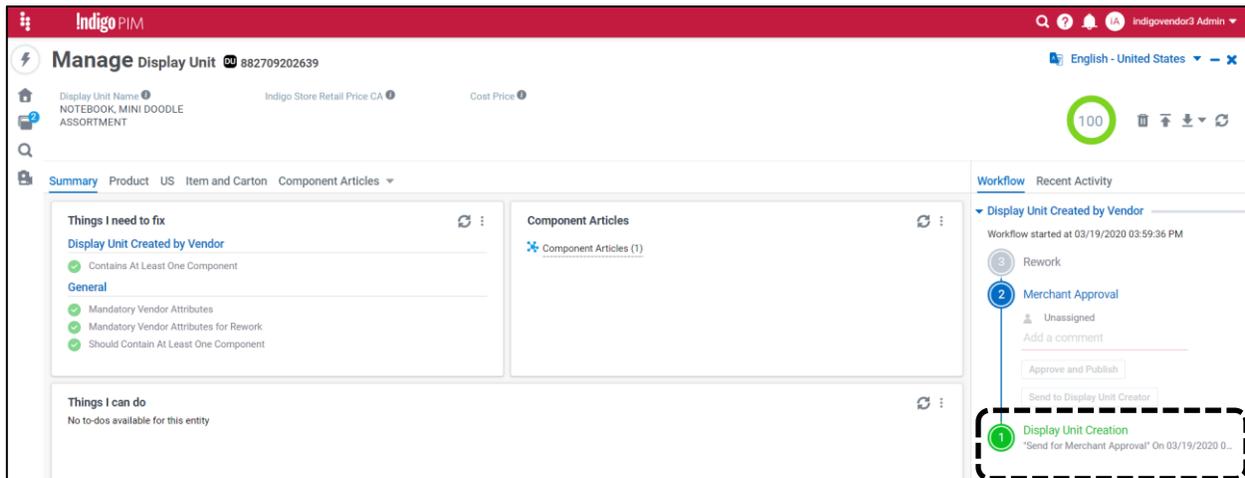


Fig. 9-2 Send for Merchant Approval

YOU HAVE SUCCESSFULLY CREATED A DISPLAY UNIT USING THE USER INTERFACE

DISPLAY UNIT CREATION

EXCEL TEMPLATE

Required Attributes

1. Click on  then  Search Thing Domain

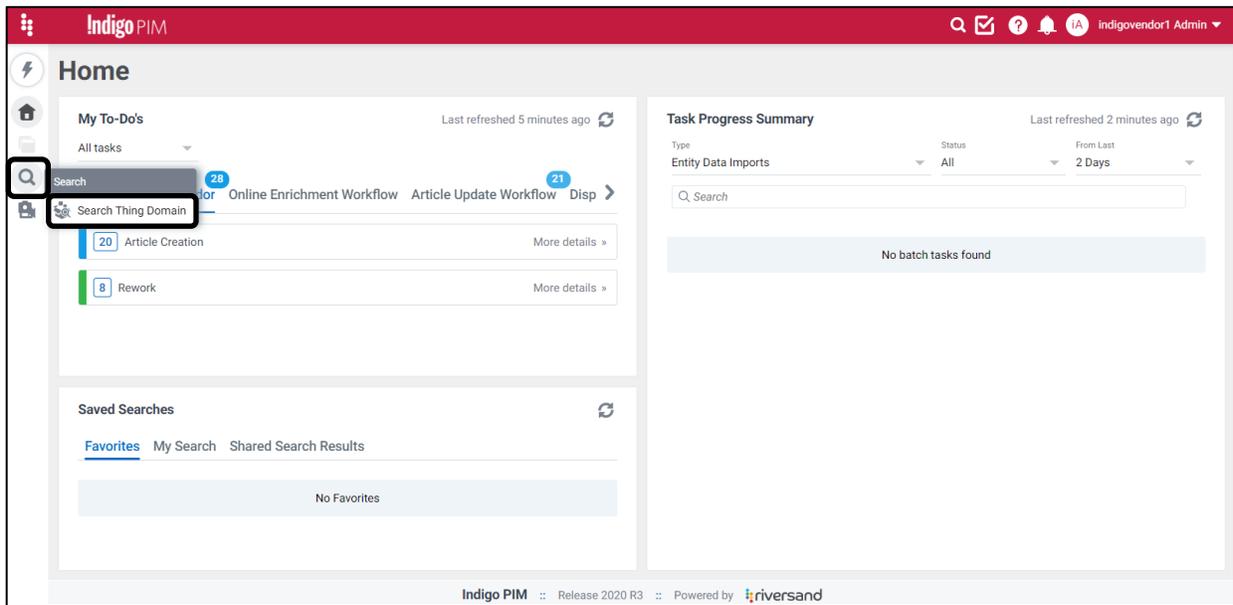


Fig. 10-1 Search

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

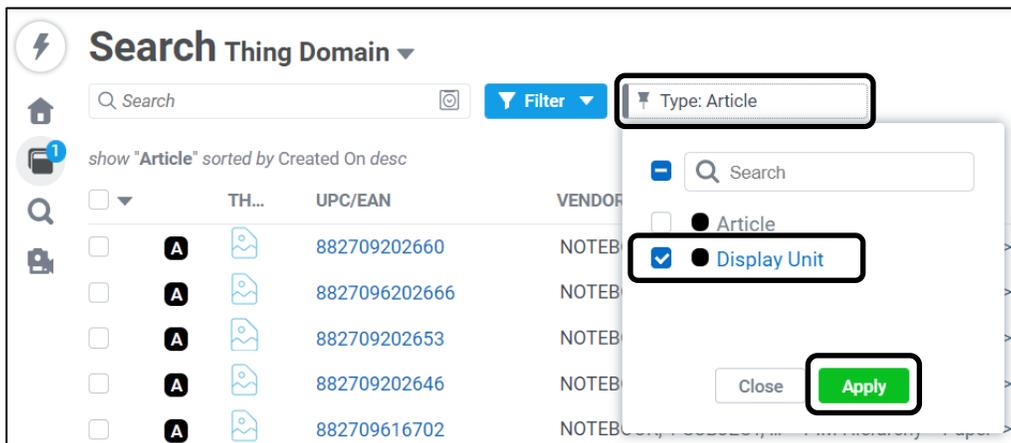
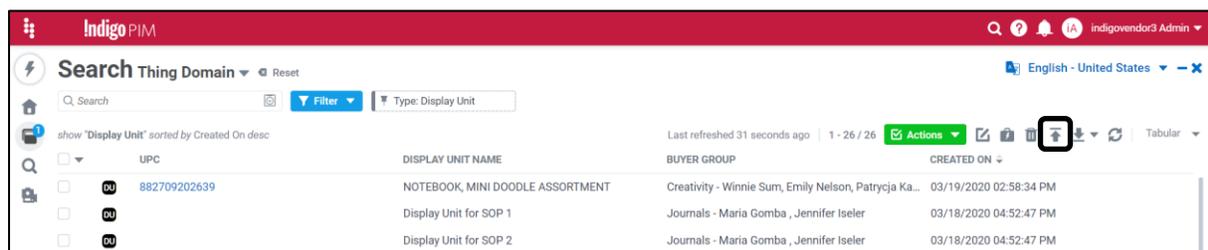


Fig. 10-2 Search

3. Click on  (Upload)



4. Click on **Download**

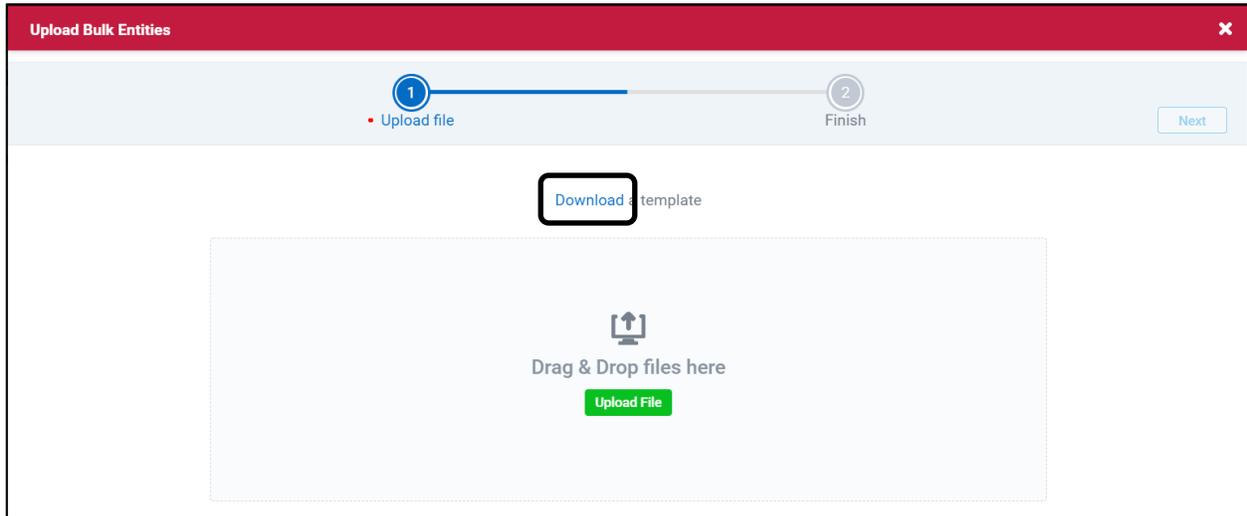


Fig. 12-1 Download Template

5. Click on **Download**

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

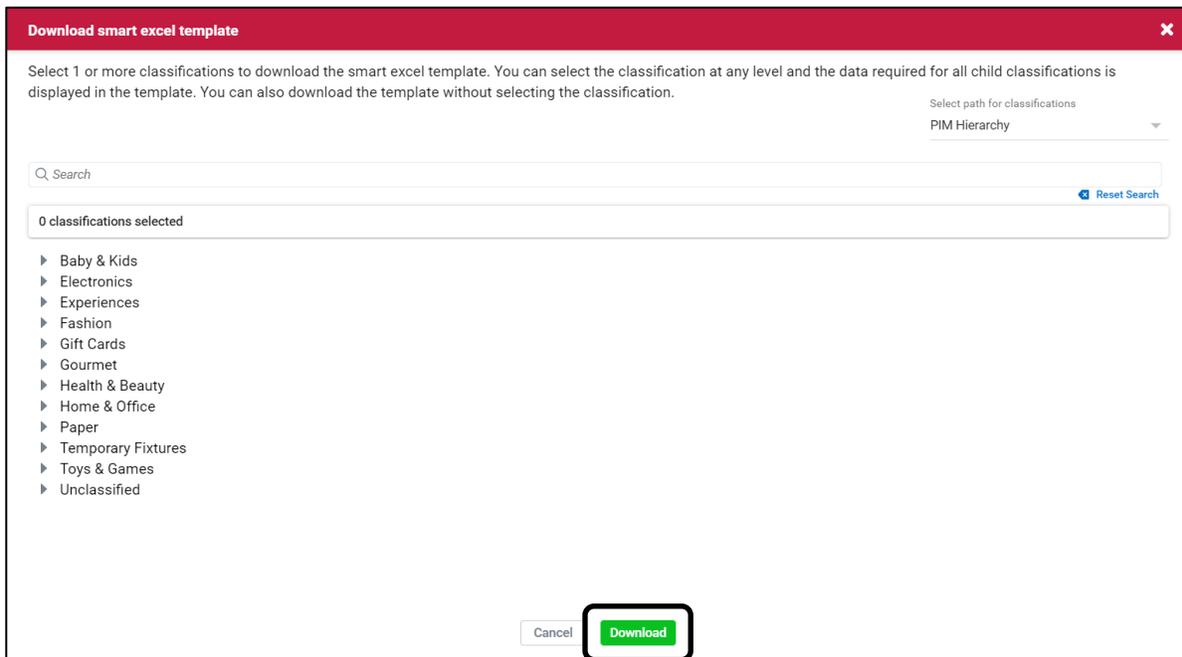


Fig. 12-2 Download Template

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

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	AA	AB
1	System	Attributes				Matchin 1A-Vene	1B-Product Description					1C-Product Category						1D-Product Pricing						1E-Product Details				
2	Action	Type	PIM Hierarchy	ID	Name	UPC/EAN	Vendor	Article	Season	Year	Original Buyer	MCAT	Layout	Market	Layout	Tax Cod	Cost Pri	Cost Pri	Indigo	Retail	MAP	Product	Retail	Retail	Brand	Sub Brand	Return	
3																												
4																												

Fig. 13 Excel Template

10. Click on the 

Download smart excel template
X

Select 1 or more classifications to download the smart excel template. You can select the classification at any level and the data required for all child classifications is displayed in the template. You can also download the template without selecting the classification.

Select path for classifications
 PIM Hierarchy ▼

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

Fig. 14 Close Excel Template

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

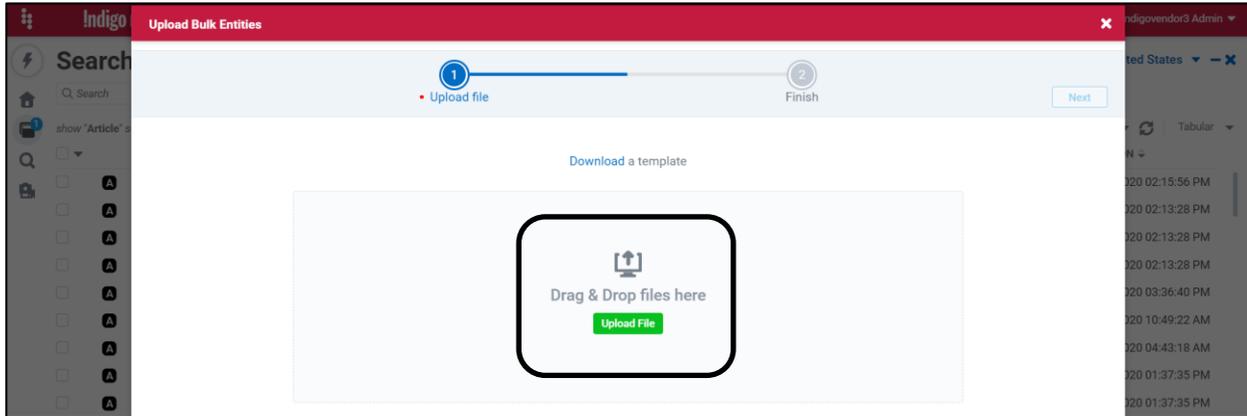


Fig. 15-1 Excel Upload

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

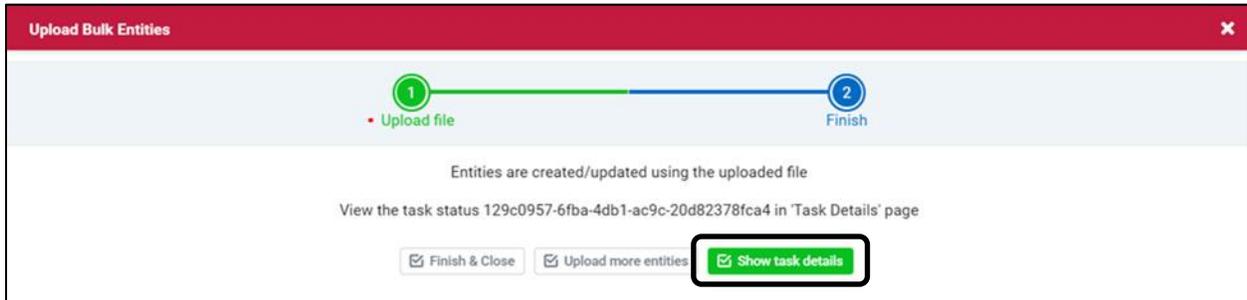


Fig. 15-2 Excel Upload

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.

1 2

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

1 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 [Add Component Articles](#) 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 [Add Component Articles](#) steps. Repeat until component articles are added to all display units in the list.

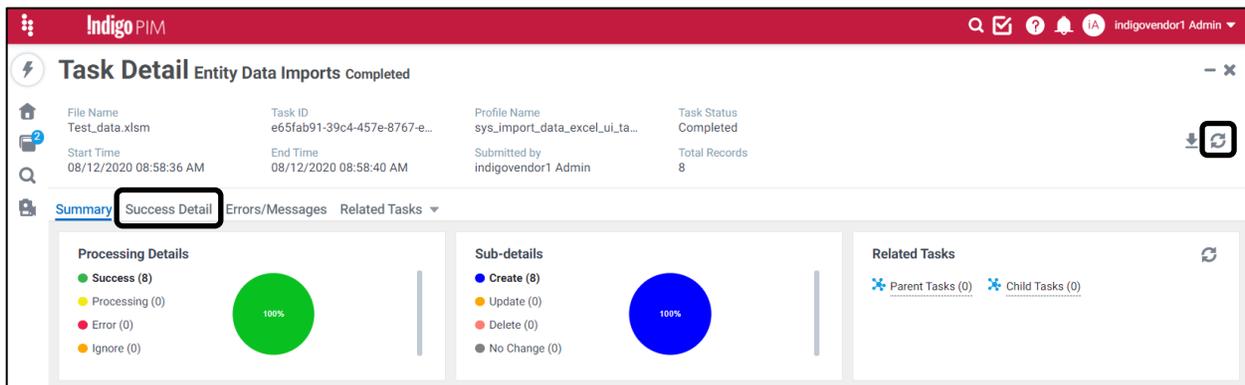


Fig. 16 Processing and Sub-details charts

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 then to get to the Search Page.
3. Change Type to **Display Unit**
4. Click on **Apply**

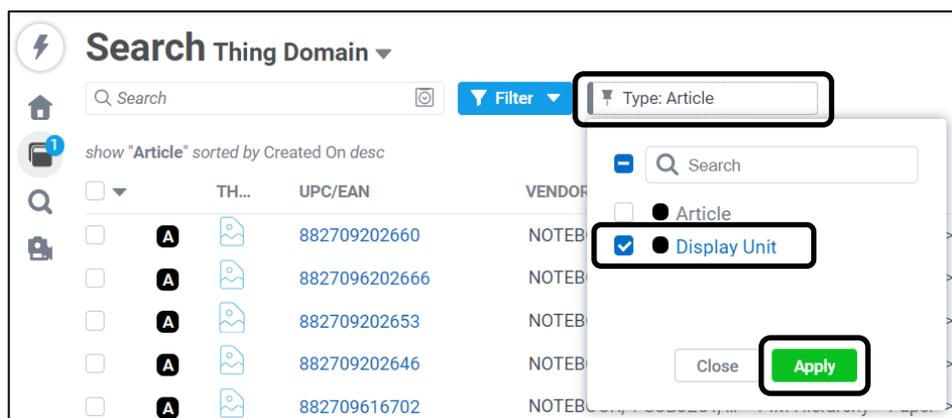
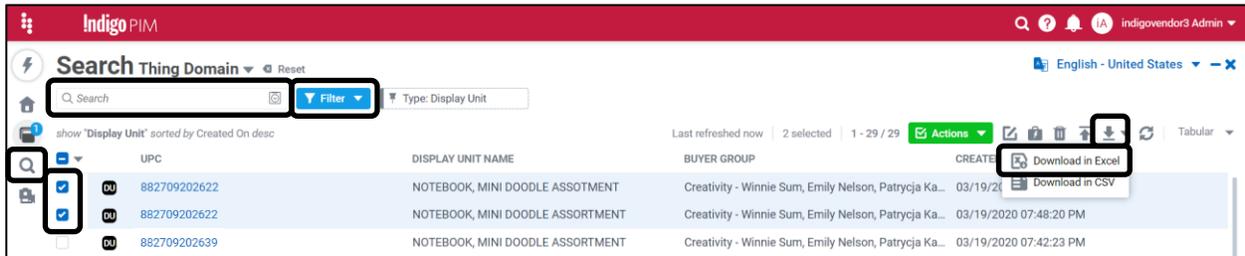


Fig. 17 Search

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  (download) and **Download in Excel**



8. Fig. 18-1 Download

9. Click on **Download All**

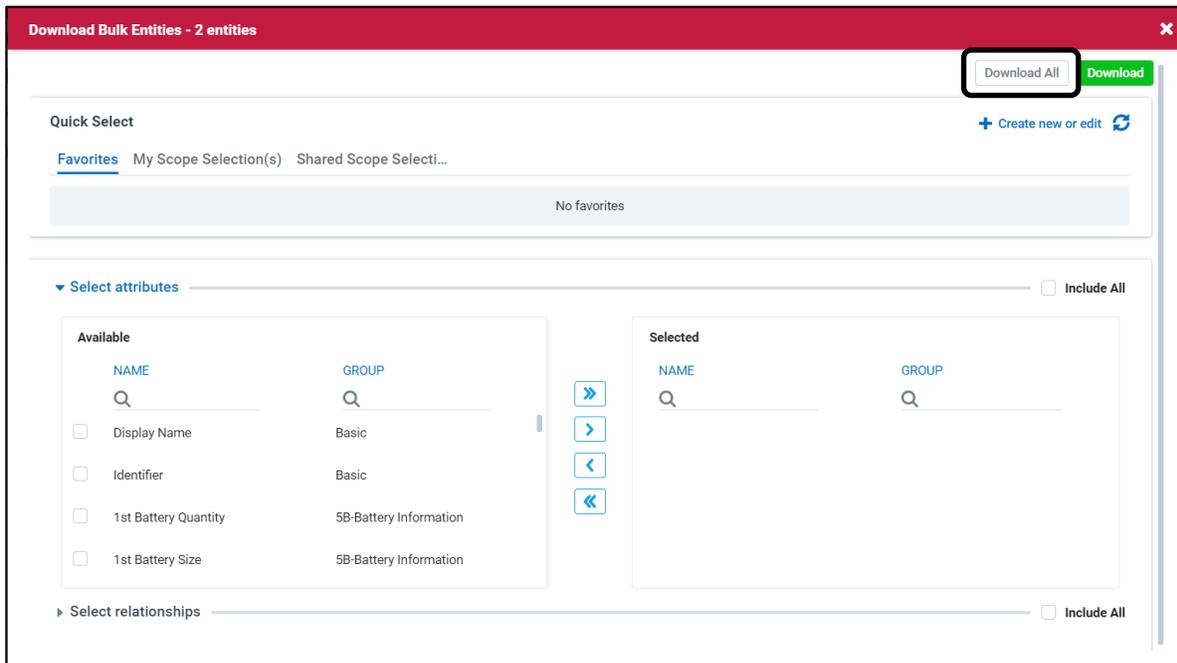


Fig. 18-2 Download

- 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)

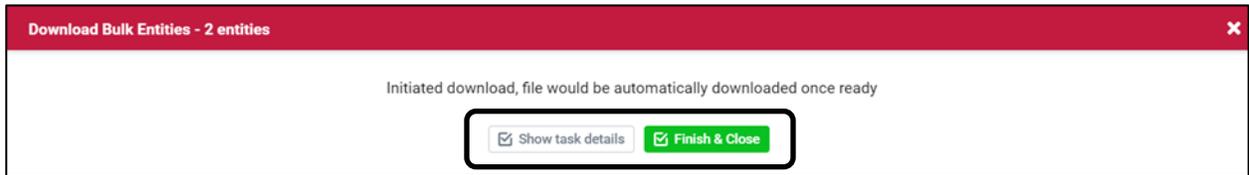


Fig. 18-3 Download

- Open the excel spreadsheet, **'Enable Editing'** and **'Enable Content'**

- 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	B	C	D	E	F	G	
1	System Attributes						RelTo Attribute(s)	Internal
2	Action	Type	ID	Name	Related to Type	UPC/EAN	Component Quantity	
3		displayunit@@Component Articles	ersUH2e9CNJuvMc	8888888888123	article	9999919986820	3	
4		displayunit@@Component Articles	ersUH2e9CNJuvMc	8888888888123	article	9999957747568	5	
5								
6								
7								

Fig. 19 Excel Template – Component Articles

- Save** the template in your folder of choice so its ready for upload

- Click on  (upload)

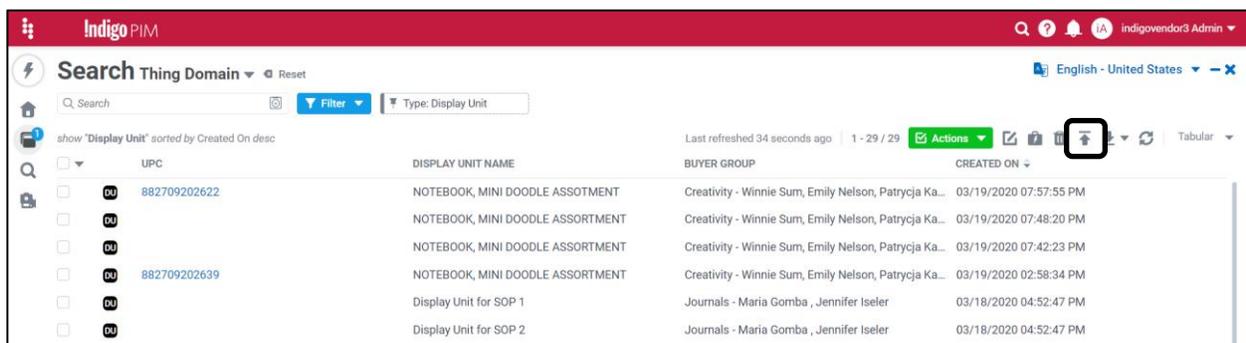


Fig. 20-1 Upload

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

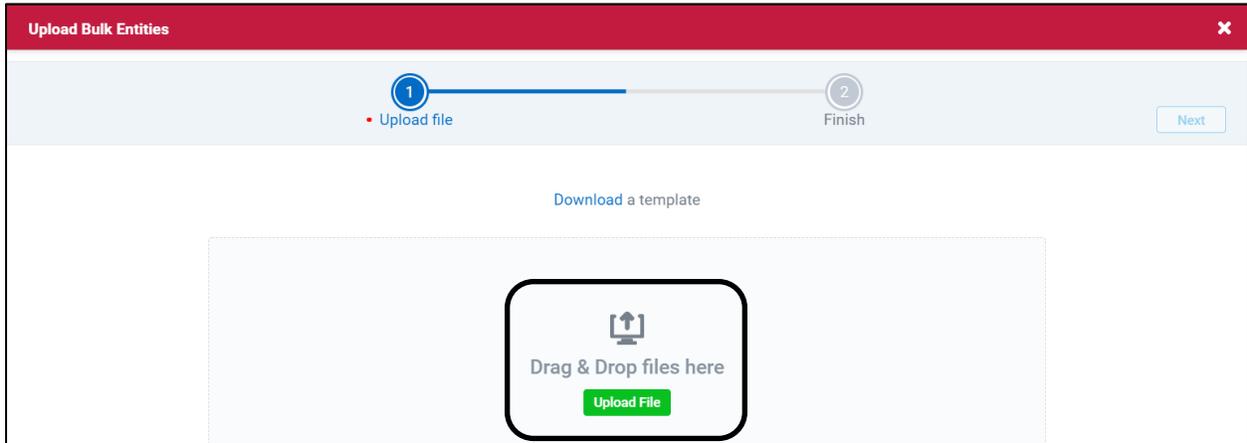


Fig. 20-2 Upload

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

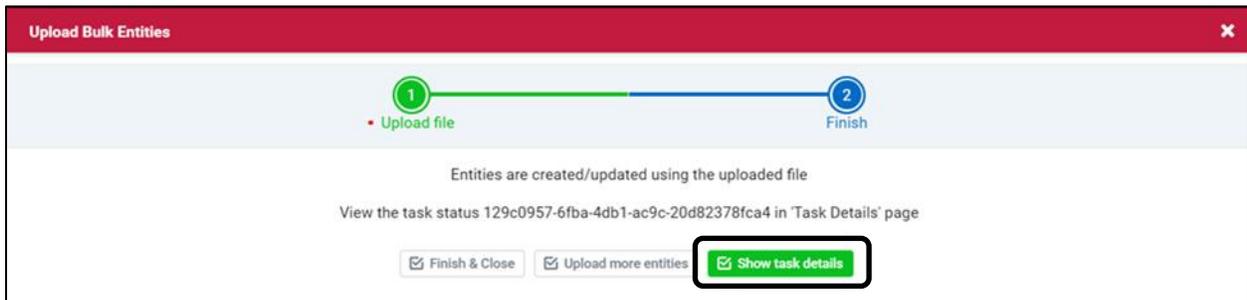


Fig. 20-3 Upload

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.

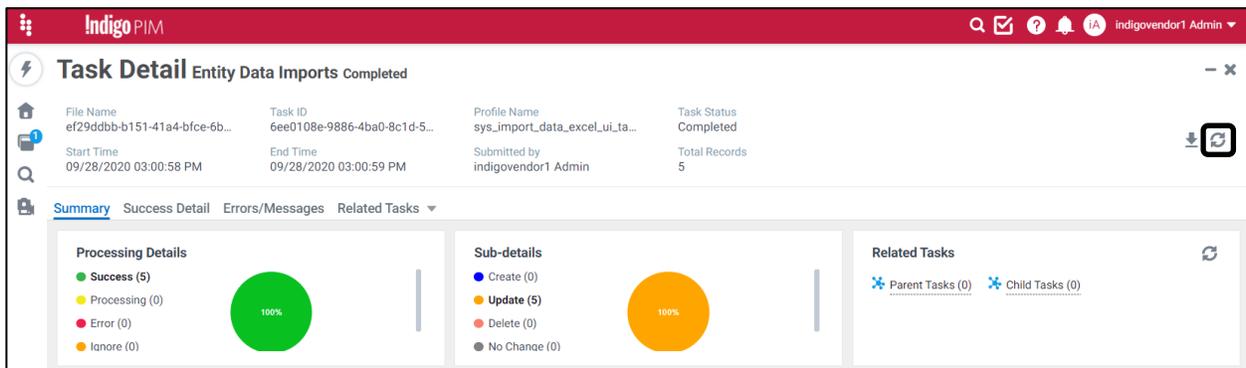


Fig. 21 Processing and sub-details

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**

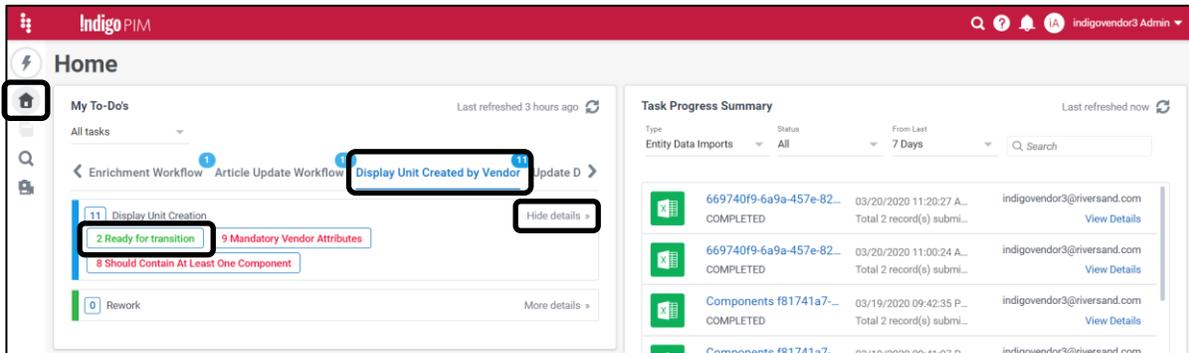


Fig. 22-1 Send for Merchant Approval Multiple

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

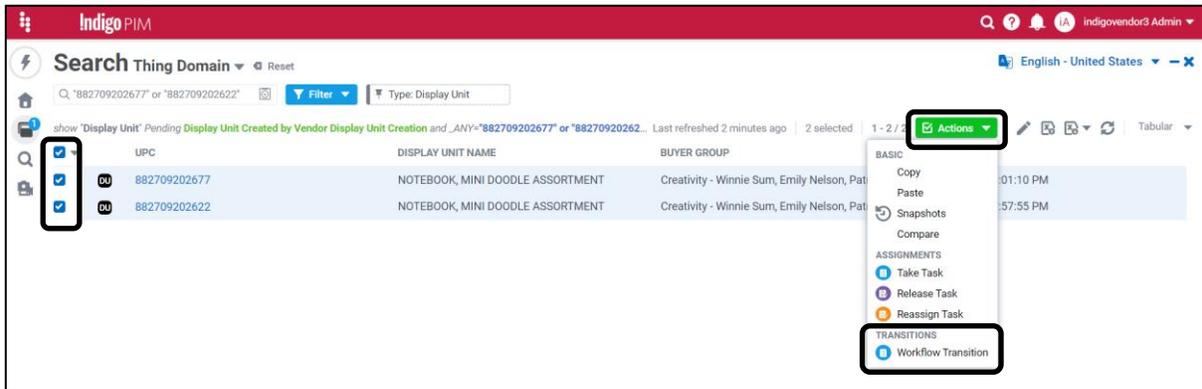


Fig. 22-2 Send for Merchant Approval Multiple

8. Click on **Send for Merchant Approval**

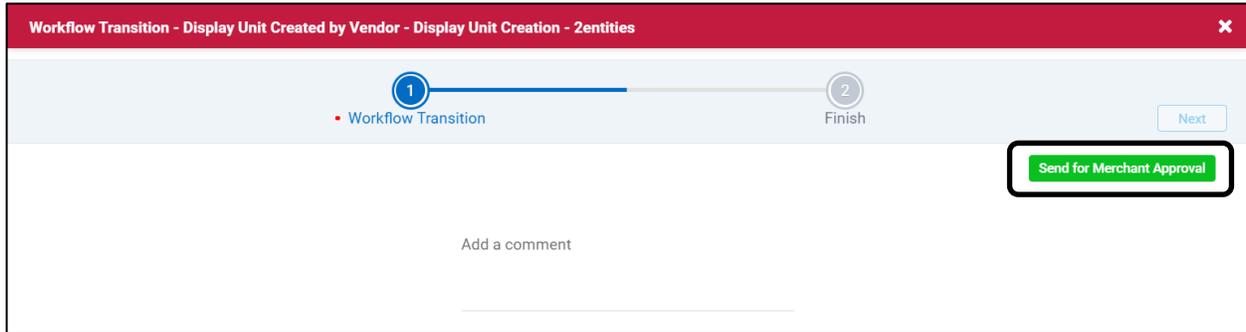


Fig. 22-3 Send for Merchant Approval Multiple

9. Click on **Finish & Close**

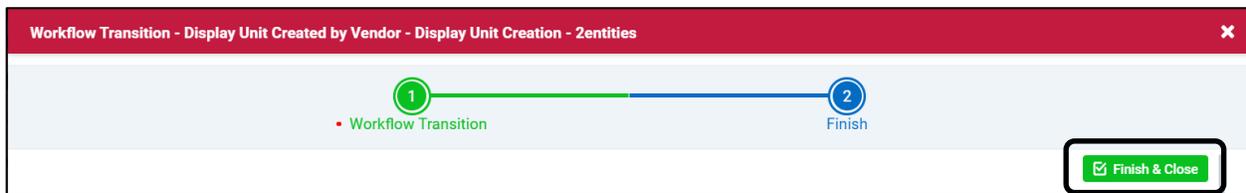


Fig. 22-4 Send for Merchant Approval Multiple

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 erred business condition and republish.

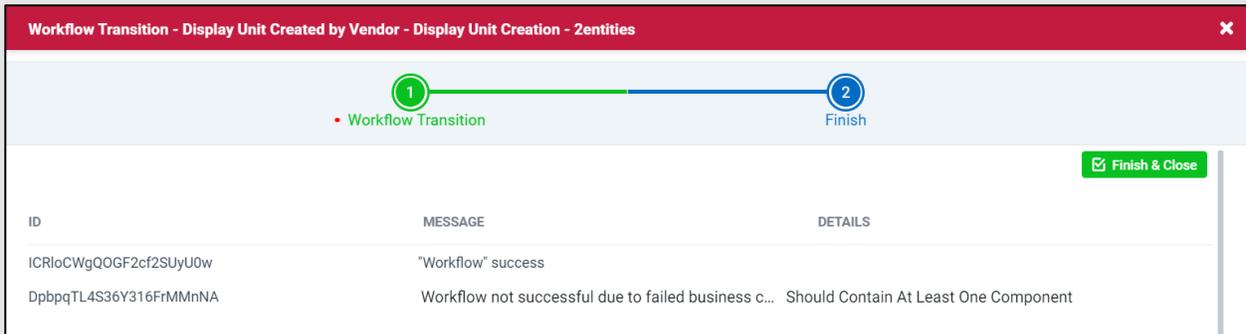


Fig. 22-5 Send for Merchant Approval Multiple

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  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.

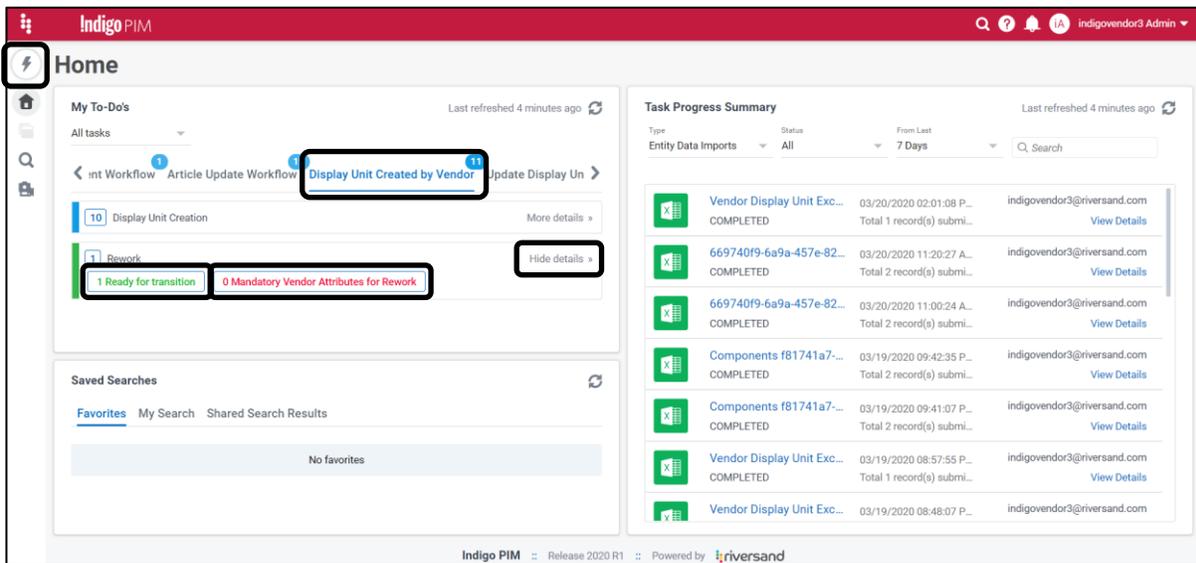


Fig. 23 Home – Rework

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

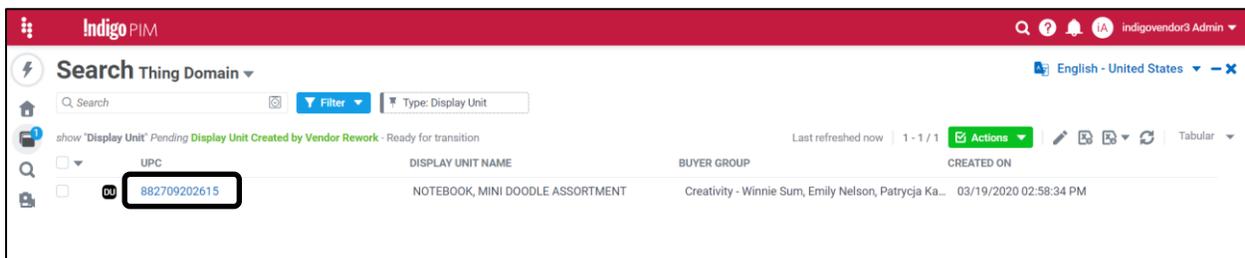


Fig. 24 Search Page

- 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"
- 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

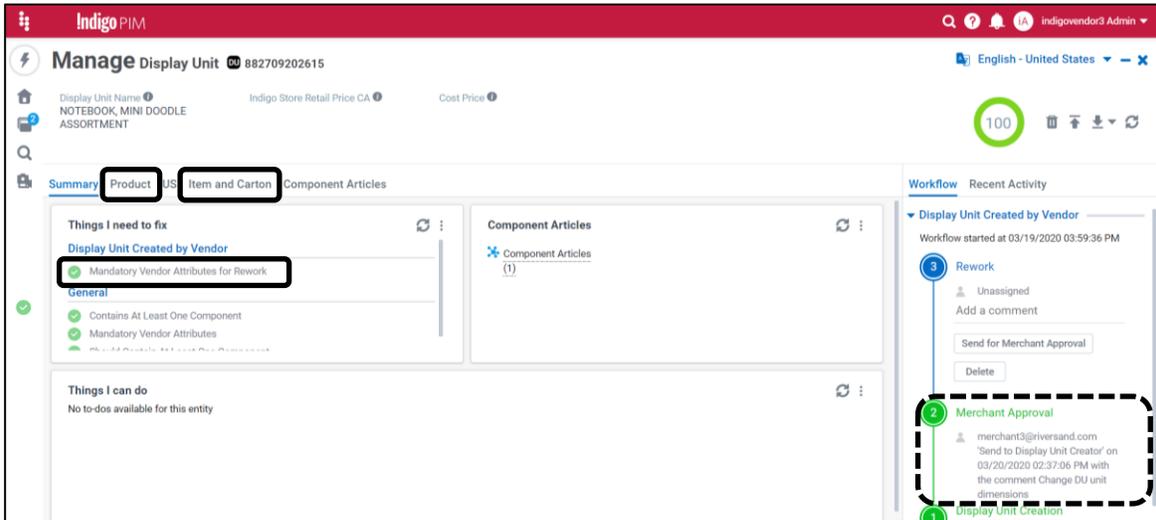


Fig. 25 Merchant Comment

- Edit the attribute to the correct value



TIP: If you clicked on a tab, remember to click on  to open the attribute for editing

- Click on  **Save**
The following message will appear: **Data saved**
- Click on  (refresh)
- 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**

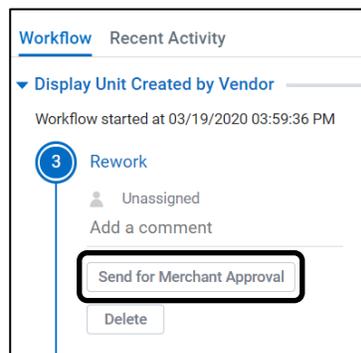


Fig. 26 Send for Merchant Approval

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