

PIM TRAINING DOCUMENT USER: VENDOR

Display Unit Management

Latest Version: R3 Upgrade September 2020

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Purpose

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

NOTE: It is recommended to use the Excel Template when updating multiple display units at once.

Before You Begin

Here's a step by step flow of the Display Unit Management Process:



Before you begin, please take note of the following:

- The L icon indicates that an action is required. The L 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⁽¹⁾. **TIP:** You will need to double click on the ⁽¹⁾ 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 \P

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

Indigo PIM				a 🗹	? 🌲 (iA indigovendor1 A	Admin
Home							
My To-Do's All tasks Created by Vendor Online Enrichment Workflow Artice Call Article Creation Rework Rework	Last refreshed 2 minutes ago	Task Progress Summary Type Entity Data Imports Q. Search	Al No batch task	s found	v	Last refreshed now From Last 2 Days	
Saved Searches Favorites My Search Shared Search Results	S						
No Favorites							
	Indigo PIM :: Release 2020 RS	3 :: Powered by					

Fig. 2 Home

DISPLAY UNIT MANAGEMENT USER INTERFACE

Update Display Unit Attributes

1. Click on ^Q then 💩 Search Thing Domain

Indigo PIM			० 🖸 😗 🌢	indigovendor1 A	dmin
Home					
My To-Do's Last refreshed 5 minutes a All tasks	go 🗭 Task Progress Summary Type Entity Data Imports	Ţ	Last Status All	refreshed 2 minutes ago From Last r 2 Days	ວ -
Online Enrichment Workflow Article Update Workflow D Online Enrichment Workflow O Onli	Q. Search	No batch ta	isks found		
Rework More det	ails »				
Saved Searches Favorites My Search Shared Search Results	Ø				
No Favorites					
Indigo PIM :: Rele	ase 2020 R3 :: Powered by Friversand				
				Fia. 3-1 Se	e

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

•	Indig!	() PIM	
4	Searc	h Thing Domain 🔻 🏼 Reset	
•	Q Search	💿 🍸 Filter 🔻 🐺 Type:	: Display Unit
P	show "Display	ay Unit" sorted by Created On desc	O Search
Q		UPC	Antiple
0.		9999900110210	Display Unit
		123456789128	
	DU	123456789647	
		123456789777	Close Apply
		123456789784	epromeoroadon i/ 1/ Eo

Fig. 3-2 Search

- 4. Search for the display unit to update by either typing in the search bar or filtering by clicking on **Filter**
- 5. Click on the UPC of the Display Unit you'd like to update

ŧ	Indig!	PIM			🔍 🥐 🌲 🚺 indigovendor3 Admin 🔻
4	Searc	h Thing Domain 🔻 🛛 Reset			🛐 English - United States 💌 🗕 🗙
•	Q Search	💿 🔽 Filter 💌 🗍	Type: Display Unit		
e	show "Display	Unit" sorted by Created On desc	L	ast refreshed 22 seconds ago 🛛 1 - 23 / 23 🗹 Actio	ns 🔽 🕼 🛍 🖌 🛓 🗸 💭 🛛 Tabular 👻
Q		UPC	DISPLAY UNIT NAME	BUYER GROUP	CREATED ON \Leftrightarrow
9		882709618805	NOTEBOOK 1 SUBJECT	Creativity - Winnie Sum, Emily Nelson, Patrycja	03/18/2020 01:19:23 PM
		9999900110210	testDSCU7861211	Journals - Maria Gomba , Jennifer Iseler	01/20/2020 04:06:10 AM
		123456789128	test #3 Jan 18/20	Baby - Laura Kaye, Sarah Martins, Nicole Savo	01/18/2020 09:44:59 PM
		123456789647	Text #2 Jan 18/20	Baby - Laura Kaye, Sarah Martins, Nicole Savo	01/18/2020 09:24:23 PM
		123456789777	Test DP Unit Creation 2 1/17/20	Preschool - Stacey Burnett, Sarah Martins, Ashl	01/17/2020 07:55:29 PM
		123456789784	Test DP Unit Creation 1/17/20	Preschool - Stacey Burnett, Sarah Martins, Ashl	01/17/2020 06:59:59 PM

Fig. 3-3 Search

- 6. Click on the tab that contains the attribute you'd like to update. In this example, we're updating Cost Price so click on the **Products** tab.
- 7. Click on 🖍 (edit) next to the field you're updating or on the top right-hand corner

:	Indigo PIM			
4	Manage Display	Unit 🕮 882709618805		100 🔎 🖬 🖬 🛛
↑↑↑↑↑↑↑↑↑↑↑↑↑↑↑↑↑↑↑↑↑↑↑↑↑↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓↓<	Display Unit Name 🛈 NOTEBOOK 1 SUBJECT	Indigo Store Retail Price CA 4 80.00	Cost Price 1 20.00	Ŭ
8	Summary Product US I	tem and Carton Component Articles 💌		
	▼ 1D-Product Pricing —			
	Cost Price (Excluding La 20.00	inding Cost) 🕦	Cost Price Currency USD - United States Dollar	
	Indigo Store Retail Price	(CAD) 🚺		
	80.00			

Fig. 4-1 Display Unit Edit

8. Update the attribute

NOTE: Attributes that are in grey font are read-only and cannot be edited

9. Click on Save

The following message will appear: Data Saved

10. Click on *C* (refresh)

Indigo PIM		Q 🥐 🌲 i indigovendor3 Admin 🤊
Manage Display Unit 🖤 882709618805		💵 English - United S 🔻 🗕 🕽
Display Unit Name Indigo Store Retail Price CA Cost F NOTEBOOK 1 SUBJECT 80.00 20.00	Price 0	100 × 🖬 🖬 🛃
Summary Product US Item and Carton Component Articles 💌		Workflow Recent Activity
 ▼ 1D-Product Pricing Cost Price (Excluding Landing Cost) ● 24.00 Indigo Store Retail Price (CAD) ● 80.00 	Cancel Save	 Update Display Unit Workflow started at 03/18/2020 02:36:14 PM Master Data Team Approval Display Unit Update Unassigned Add a comment Publish
▼ 1E-Product Details Brand ^①	Country of Origin China x	 Display Unit Created by Vendor
Handling Indicator 🖤	HS Code Canada 🗊	
Indigo P	IM :: Release 2020 R1 :: Powered by Friversand	

NOTE ON UPDATING DISPLAY UNIT COMPONENT ARTICLES:

Component Articles can only be added during the Display Unit Creation process. If you need to update component articles (add, delete or change quantity) for an existing Display Unit, contact your Indigo Merchant team for assistance.

Publish

 To publish your attribute updates, under Workflow, click on Publish. The following message will appear: Workflow action completed successfully

NOTE: When you click on Publish, the Display Unit modifications will be sent to the Master Data team for approval.



Fig. 5 Publish

DISPLAY UNIT MANAGEMENT EXCEL TEMPLATE

Update Multiple Display Units

1. Click on ^Q then search Thing Domain

Task Progress Summary Last refreshed 2 minutes ago Type Status Type Status From Last Entity Data Imports All
Task Progress Summary Last refreshed 2 minutes ago 2 Type Status Entity Data Imports ✓ All
Q, Search No batch tasks found
F

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



Fig. 6-2 Search

- 3. Search for the display unit(s) to update by either typing in the search bar or clicking on **Filter**
- 4. Select the Display Unit(s) you'd like to update
- 5. Click on $\stackrel{\bullet}{=}$ and **Download in Excel**

:	Indigo!	PIM			🔍 🥐 🌲 🚯 indigovendor3 Admin 🔻
4	Searc	h Thing Domain 👻 🛛	Reset		💽 English - United States 💌 🗕 🗙
•	Q "12345678	89777" or "123456789647" 💿	Filter Type: Display Unit		
e	show "Display	Unit" and _ANY="123456789777	" or "123456789647" sorted by Created On desc	Last refreshed 1 minute ago 2 selected 1 - 2 / 2	ns 🔽 🖸 🗓 🖬 🛨 🖸 🗘 Tabular 👻
Q		UPC	DISPLAY UNIT NAME	BUYER GROUP	CREA' CONNIcad in Excel
O.	2	123456789647	Display Unit Test SOP 1	Baby - Laura Kaye, Sarah Martins, Nicole Savo	01/18 Download in CSV
	2	123456789777	Display Unit Test SOP 2	Preschool - Stacey Burnett, Sarah Martins, As	01/17/2020 07:55:29 PM
	U				
					Fig. 7-1 Download

- 6. Type the name of the attribute(s) you want to update into the **Name** field. In this example, it's **Country of Origin**.
- 7. Click and >>> for each attribute you're looking to download
- 8. Once all the attributes you want to update are in the '**Selected**' section of the screen, click on **Download**

NOTE: If you want to download all display unit attributes, click on Download All

wnload Bulk Entities - 2 entities			
			Download All
Quick Select			+ Create new or edit 💋
Favorites My Scope Selection(s)	Shared Scope Selecti		
		No favorites	
✓ Select attributes			Include All
Available		Selected	
NAME	GROUP	NAME	GROUP
Q country	Q		Q
Country of Origin 1	E-Product Details		
—			i
			}
		·	<i>i</i>
Select relationships			

Fig. 7-2 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)

Download Bulk Entities - 2 entities	×
Initiated download, file would be automatically downloaded once ready	
Show task details Finish & Close	
	Fig. 7-3 Downlogd

- 10. Open the excel spreadsheet, 'Enable Editing' and 'Enable Content'
- 11. Click on the 'Entities' tab
- 12. Update the attribute(s)

NOTE: Ensure the fields have the correct formatting, as defined in the Data Dictionary

A	Α	В	С	D	E	F
1	System	Attributes		Matching Attribute(s)	1E-Product Details	
2	Action	Туре	ID	Name	UPC/EAN	Country of Origin
3		displayunit	ersuj9am31ry1I8	123456789777	123456789777	Canada
4		displayunit	ersflGOf1ONGVB2	123456789647	123456789647	Canada

Fig. 8 Excel Template - Attributes

NOTE ON UPDATING DISPLAY UNIT COMPONENT ARTICLES:

Components can only be added during the Display Unit Creation process. To update component articles (add, delete or change quantity), contact your Indigo Merchant team for assistance.

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

ų	Indigo PIM					🔍 🗹 🕜 🦺 🚯 indigovendor1 Admin 🔻
4	Task Detail Entity D	Oata Exports Completed				-×
†	File Name b055b42e-2255-406c-9f95-1	Task ID b055b42e-2255-406c-9f95-1	Profile Name sys_export_data_excel_ui_ta	Task Status Completed		1 C
Q	Start Time 09/28/2020 03:31:26 PM	End Time 09/28/2020 03:31:30 PM	Submitted by indigovendor1 Admin	Total Records 3		∑ K∕
8	Summary Errors/Messages R	elated Tasks 💌				
	Processing Details		Related Tasks		C	
	 Success (3) Processing (0) 		🄀 Parent Tasks (0) 🛛 🕻 Child Tas	ks (0)		
	 Error (0) 	100%				
	 Ignore (0) 					
L						Fia. 9 Close Task Detail

14. If you clicked on Show task details in step 10 above, click on the imes

15. Click on (Upload)

÷	!n	ıdigo	PIM			Q ? 🌲 🔥 indigovendor3 Admin 🔻
4	Sea	arch	Thing Domain 🔻 🛯 Reset			🛐 English - United States 💌 🗕 🗙
•	Q *12	3456789	9777" or "123456789647 💿 🍸 Filter 🔻 🗍	Type: Display Unit		_
e	show "D	isplay U	Init" and _ANY="123456789777" or "123456789647"	sorted by Created On desc	Last refreshed 2 minutes ago 2 selected 1 - 2 / 2 🗹 Actions	I i i i i i i i i i i i i i i i i i i i
Q	✓ ▼		UPC	DISPLAY UNIT NAME	BUYER GROUP	CREATED ON 🜩
а.		DU	123456789647	Display Unit Test SOP 1	Baby - Laura Kaye, Sarah Martins, Nicole Savo	01/18/2020 09:24:23 PM
		DU	123456789777	Display Unit Test SOP 2	Preschool - Stacey Burnett, Sarah Martins, A	01/17/2020 07:55:29 PM

Fig. 10-1 Upload

NOTE: You can upload the file from any search page – you don't have to upload it from the same search with the articles selected.

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

Upload Bulk Entities			×
	• Upload file	Finish	Next
	Download	a template	
	Drag & Dro Upto	p files here	
			Fig. 10-2 Upload

 9.	10 2	opic	ac
		0,0.0	
~			

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 06bcdad5-f09e-45db-9d15-5ad39bba9c7f in 'Task Details' pag	ge
	Finish & Close Upload more entities Show task details	
		Fig. 10-3 Ur

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 see error details.

:	Indigo PIM				Q 🗹 🥜 🦺 🛝 indigovenc	dor1 Admin 🔻
۶	Task Detail Entity D	ata Imports Completed				- x
†	File Name b055b42e-2255-406c-9f95-1	Task ID ec45f729-44da-4030-b1c9-9	Profile Name sys_import_data_excel_ui_ta	Task Status Completed		• C
Q	Start Time 09/28/2020 03:34:10 PM	End Time 09/28/2020 03:34:14 PM	Submitted by indigovendor1 Admin	Total Records 3		± ₽
8	Summary Success Detail Error	rs/Messages Related Tasks 💌				
	Processing Details		Sub-details		Related Tasks	ø
	Success (3)		Create (0)		🄀 Parent Tasks (0) 🛛 🔆 Child Tasks (0)	
	 Processing (0) Frace (0) 	100%	Update (3)	100%		
	Error (U)		 Delete (0) No Change (0) 			
			• No change (0)			

Fig. 11 Processing and sub-details

Publish Multiple Display Units

- 1. Click on the ¹ to get to the **Home** page
- 2. Click on Update Display Unit
- 3. Click on More Details under 'Display Unit Update'
- 4. Click on Ready for Transition

:	Indigo PIM			
•	Home			
	My To-Do's All tasks W Article Update Workflow Display Unit Update Ready for transition	19 v Display Unit Created by Ver	Last refreshed 11 minutes ago)
				Fig.

- 5. Select the Display Units you updated/ want to publish
- 6. Click on Actions
- 7. Click on Workflow Transition

ŧ	Indigo I	PIM			Q	? 🌲 i Aindigovendor3 Admin 🔻
4	Search	Thing Domain 🔻				🔄 English - United States 💌 🗕 🗙
•	Q Search	🕞 🍸 Filter 🔻	🖣 Type: Display Unit			
6	show "Display U	nit" Pending Update Display Unit Display Unit Upd	ate - Ready for transition	Last refreshed now 2 selected	1-3/3 🗹 Actions 🔻	🖍 🔀 🔀 🔻 🞜 🛛 Tabular 💌
Q	-	UPC	DISPLAY UNIT NAME	BUYER GROUP	BASIC	4
n .	v	123456789777	Display Unit Test SOP 2	Preschool - Stacey Burnett, Sar	Сору	20 07:55:29 PM
	v	123456789647	Display Unit Test SOP 1	Baby - Laura Kaye, Sarah Martir	Paste Snapshots	20 09:24:23 PM
		123456782341	Test DP Unit Training 1/15/20	Preschool - Stacey Burnett, Sar	Compare ASSIONMENTS Take Task Release Task Reassign Task TRANSITIONS Workflow Transition	20 01:15:18 PM

Fig. 12-2 Publish Multiple

8. Click on **Publish**

The following message will appear: Workflow action completed successfully

Workflow Transition - Update Display Unit - Display Unit Update - 2entities		×
Workflow Transition	2 Finish	Next
		Publish
Add a comment		

Fig. 12-3 Publish Multiple

9. Click on Finish & Close

Workflow Transition - Update Display Unit - Display Unit Update - 2entities						
	Workflow Transition	Finish				
ID	MESSAGE	DETAILS	Finish & Close			
ersuj9am31ry118 ersflGOf10NGVB2	"Workflow" success "Workflow" success					

Fig. 12-4 Publish Multiple

NOTE: When you click Publish, the Display Unit modifications will be sent to the Master Data team for approval.