

PIM TRAINING DOCUMENT

USER: VENDOR

Display Unit Management

Latest Version: R3 Upgrade September 2020



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PREFACE

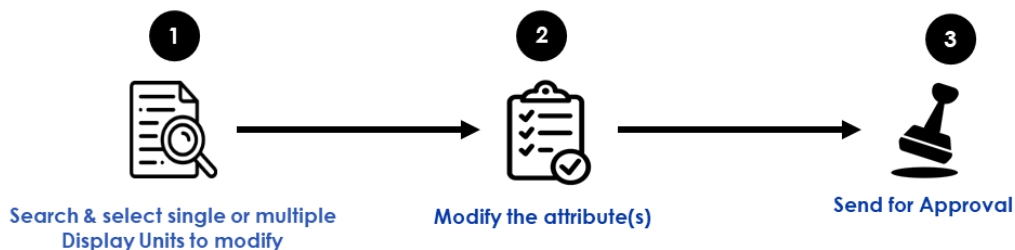
Purpose

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  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.syndigo.com/>
2. Enter your **Username** and **Password**
3. Press **'Enter'** or click on **'Log In'**

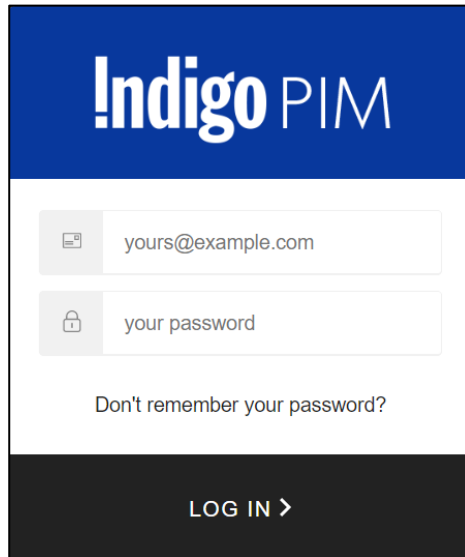


Fig. 1 Login Screen

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

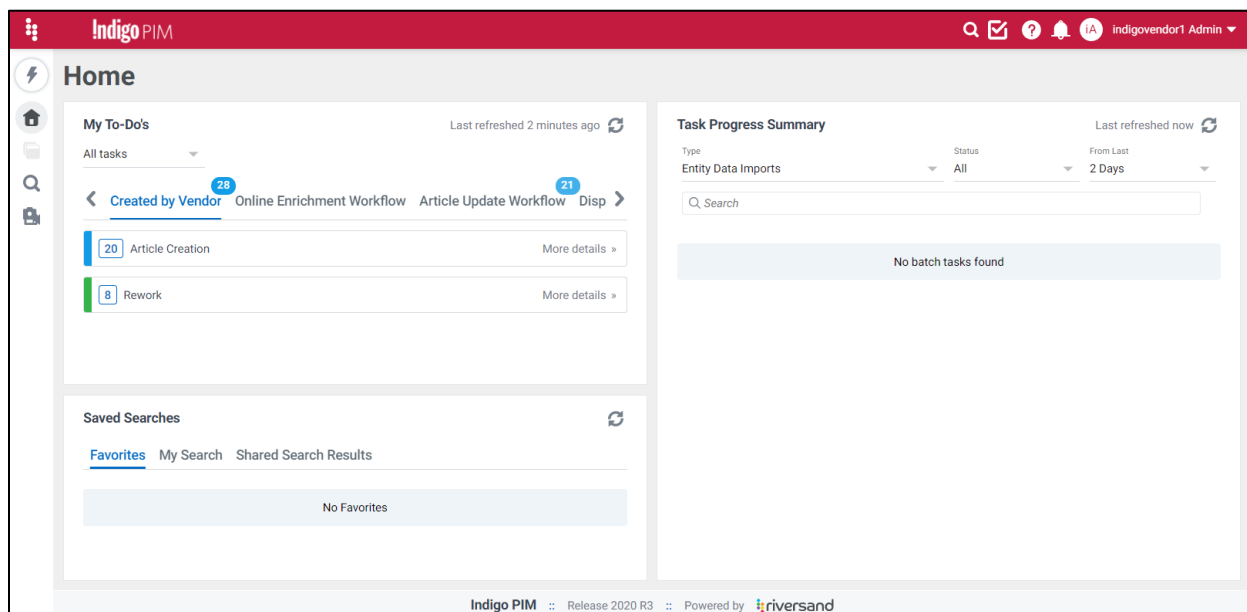


Fig. 2 Home

DISPLAY UNIT MANAGEMENT USER INTERFACE

Update Display Unit Attributes

1. Click on  then  Search Thing Domain

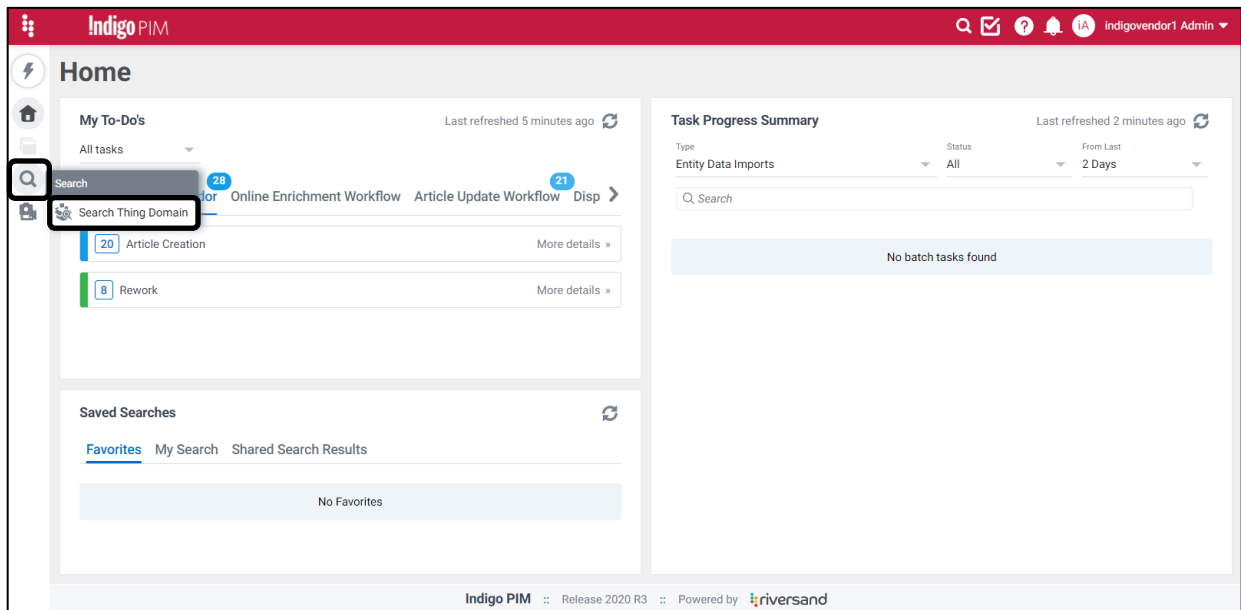


Fig. 3-1 Search

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

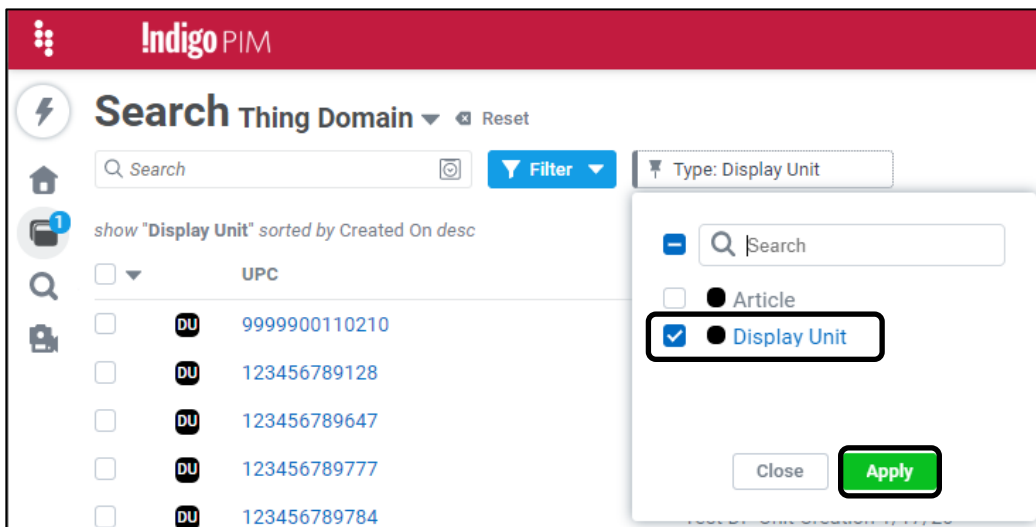


Fig. 3-2 Search

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

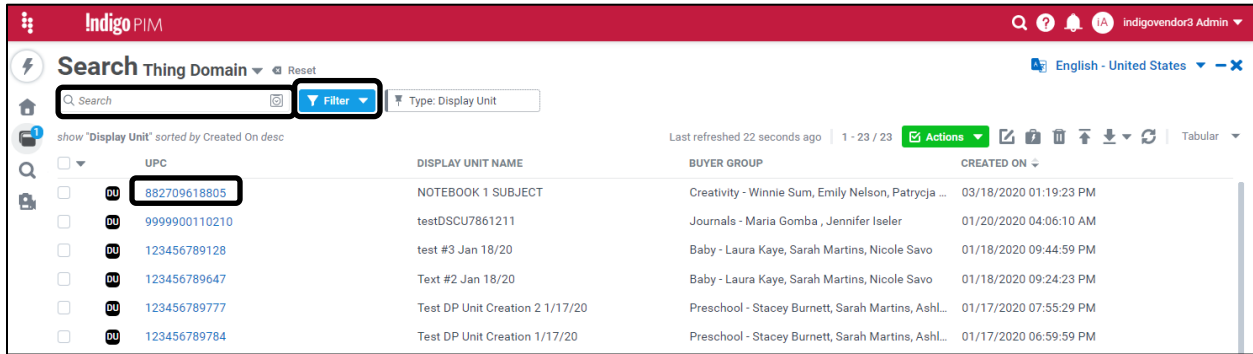



Fig. 3-3 Search

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

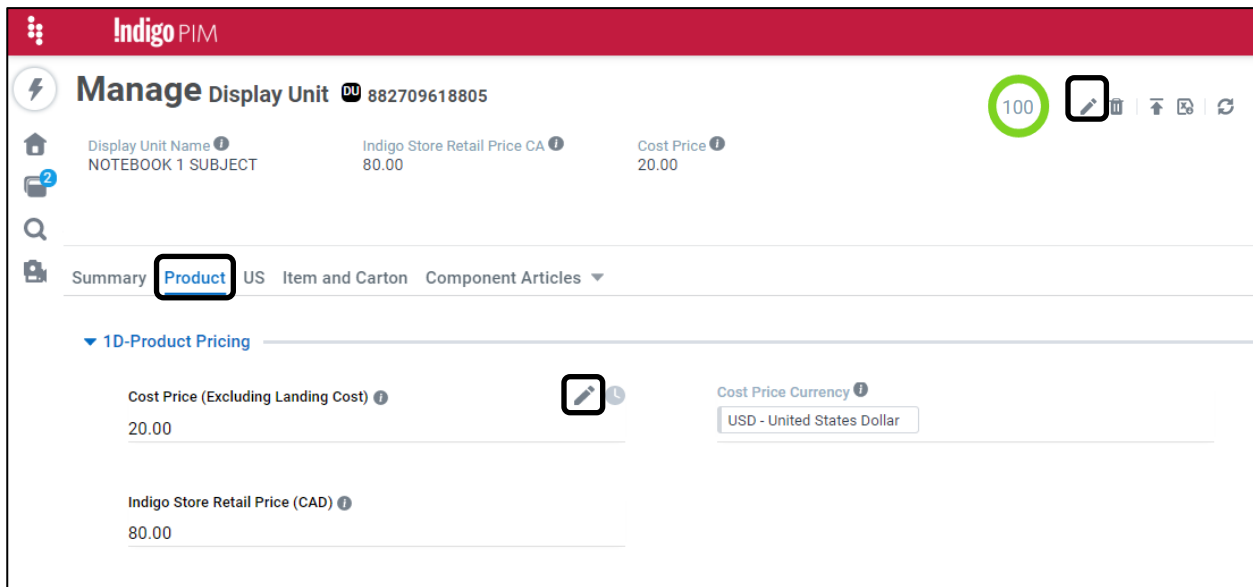


Fig. 4-1 Display Unit Edit

- Update the attribute

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

- Click on  Save
The following message will appear: **Data Saved**

- Click on  (refresh)

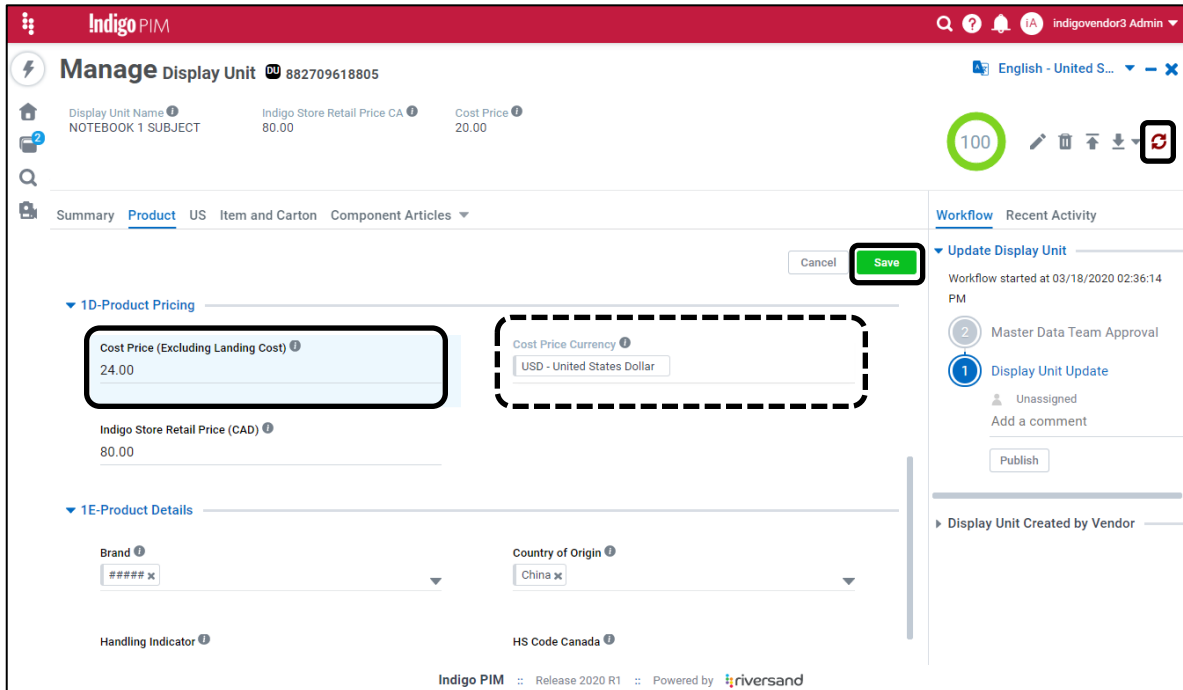


Fig. 4-2 Display Unit Edit

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

1. 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.

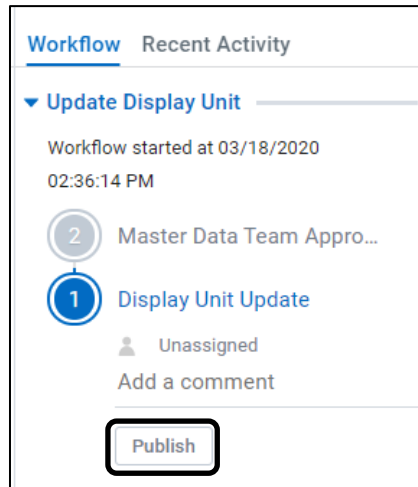


Fig. 5 Publish

DISPLAY UNIT MANAGEMENT EXCEL TEMPLATE

Update Multiple Display Units

1. Click on  then  Search Thing Domain

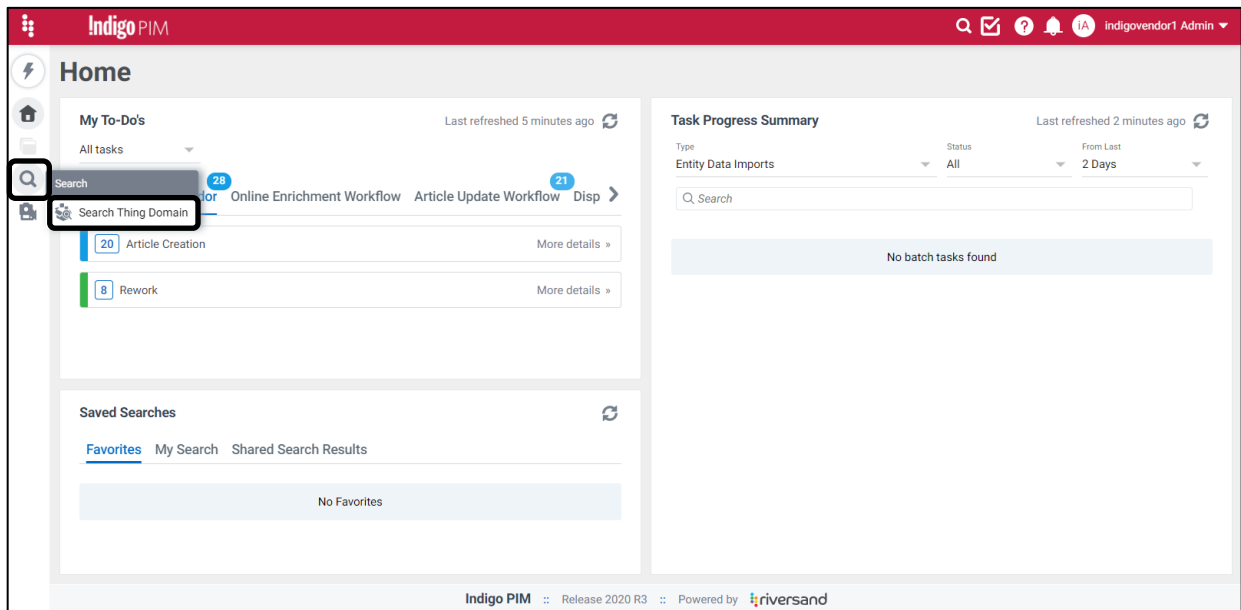


Fig. 6-1 Search

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

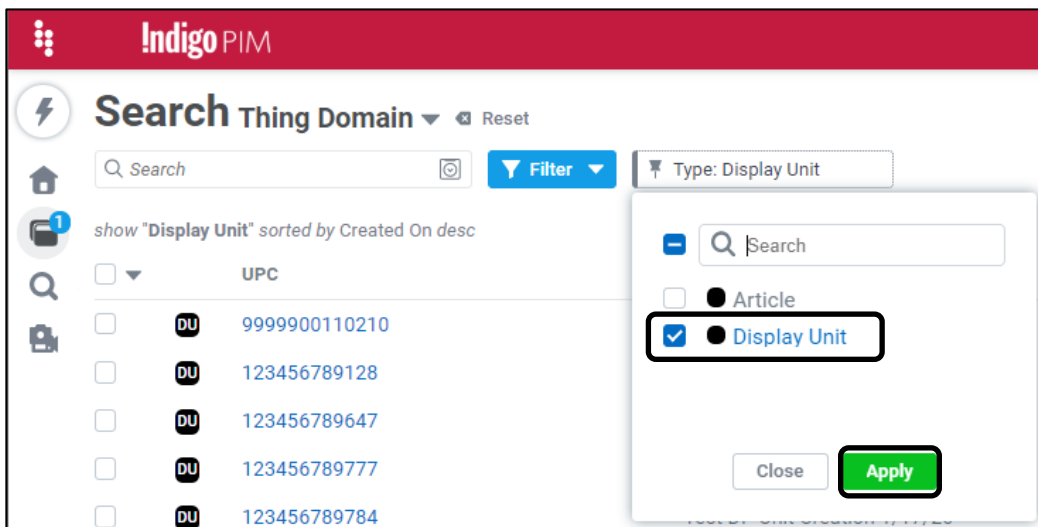



Fig. 6-2 Search

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  and **Download in Excel**

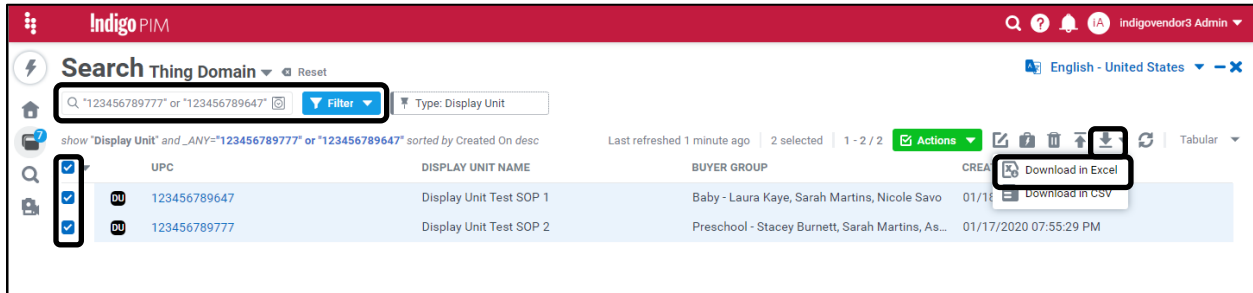



Fig. 7-1 Download

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**

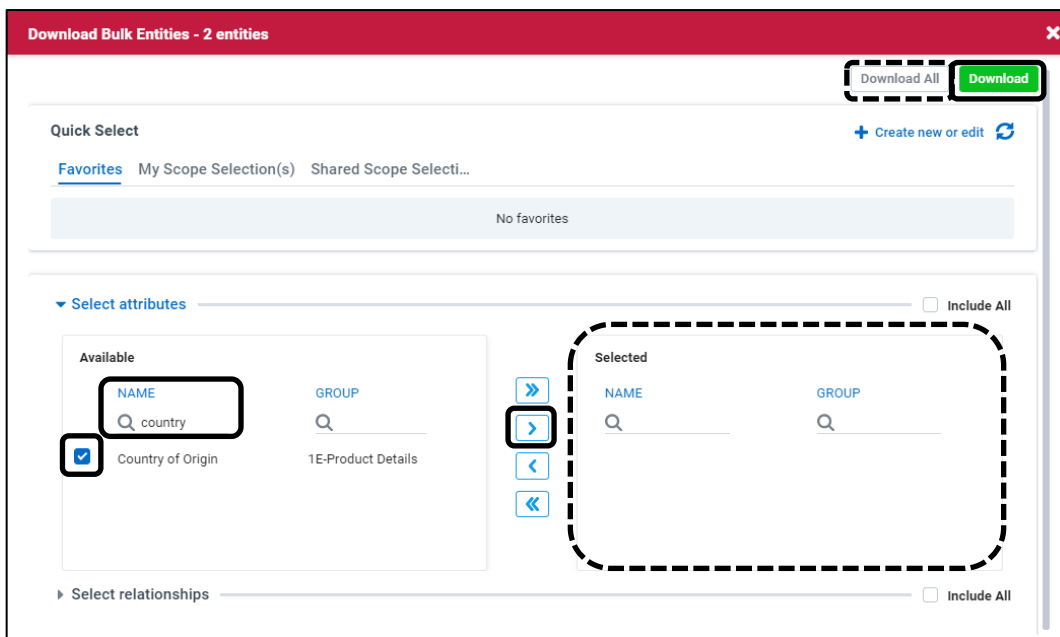


Fig. 7-2 Download

- 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)

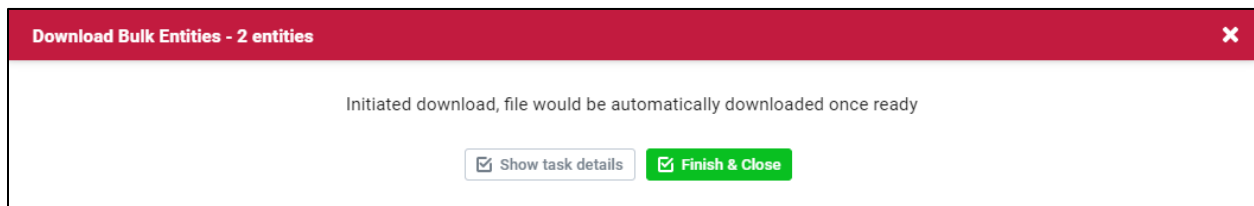


Fig. 7-3 Download

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

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

	A	B	C	D	E	F
1	System Attributes				Matching Attribute(s)	1E-Product Details
2	Action Type	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.

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

- If you clicked on Show task details in step 10 above, click on the

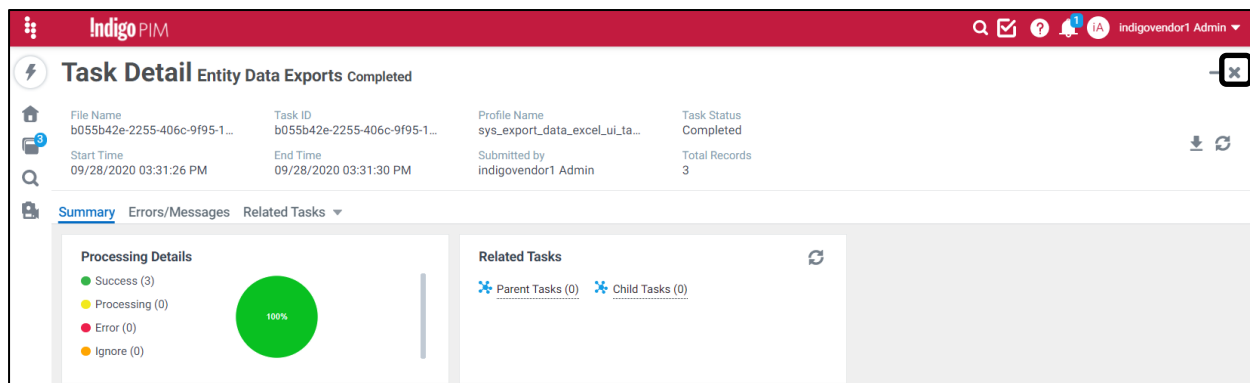



Fig. 9 Close Task Detail

15. Click on  (Upload)

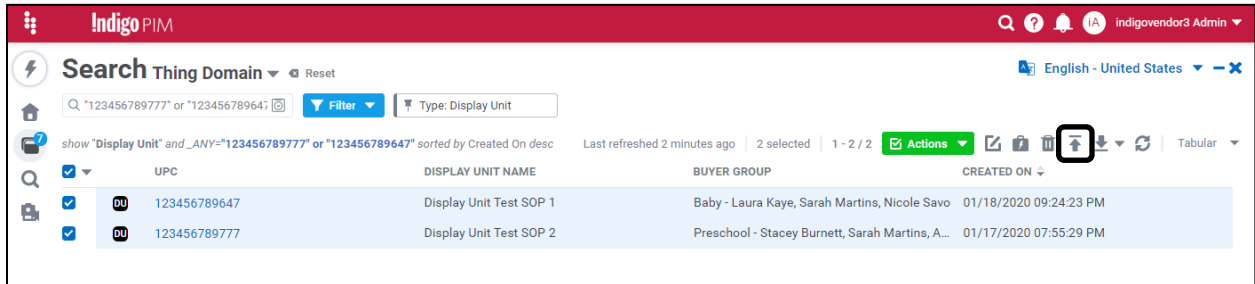


Fig. 10-1 Upload

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

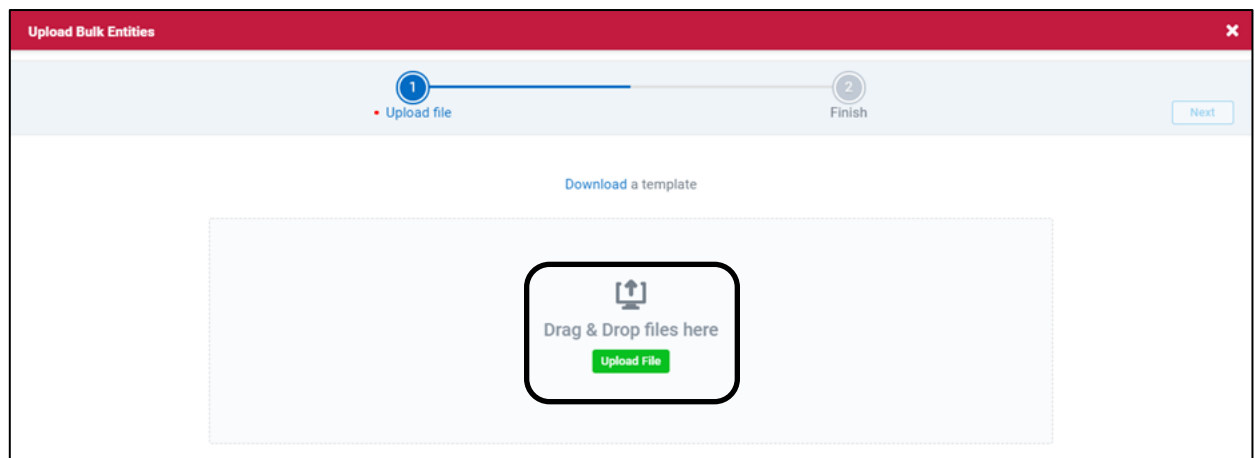


Fig. 10-2 Upload

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

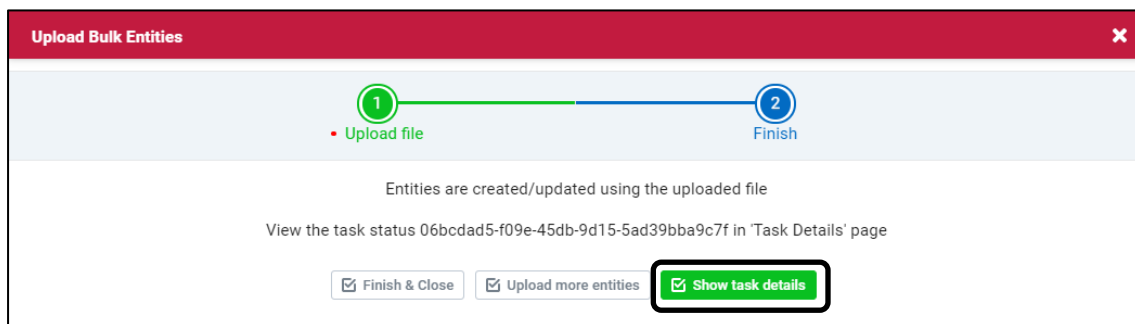


Fig. 10-3 Upload

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 see error details.

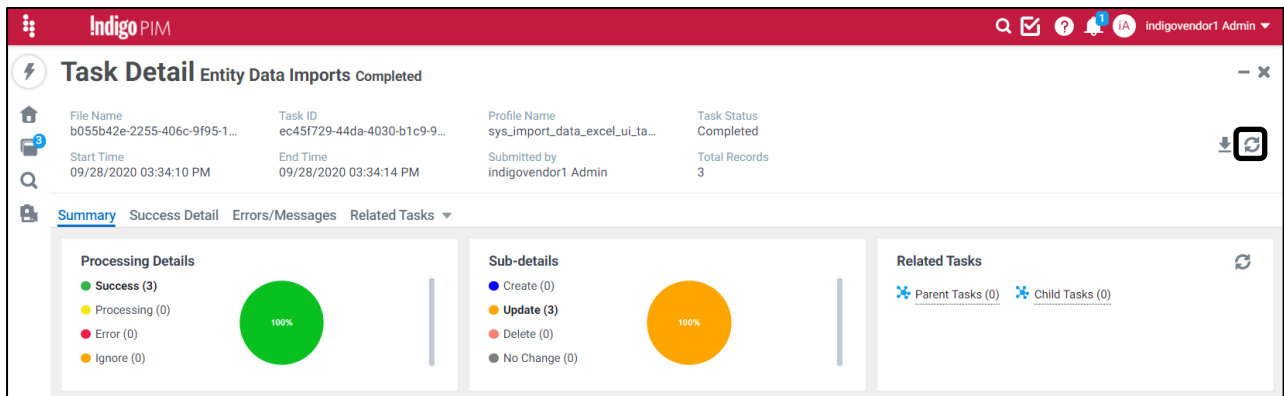



Fig. 11 Processing and sub-details

Publish Multiple Display Units

1. Click on the  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**

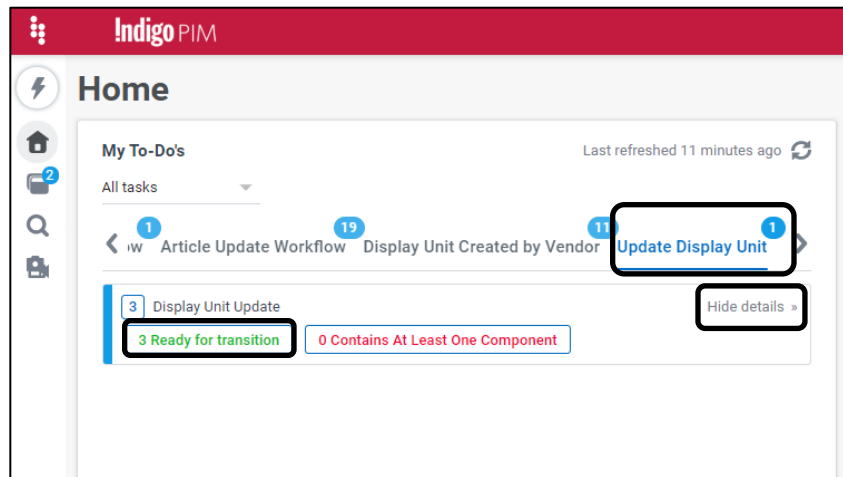



Fig. 12-1 Publish Multiple

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

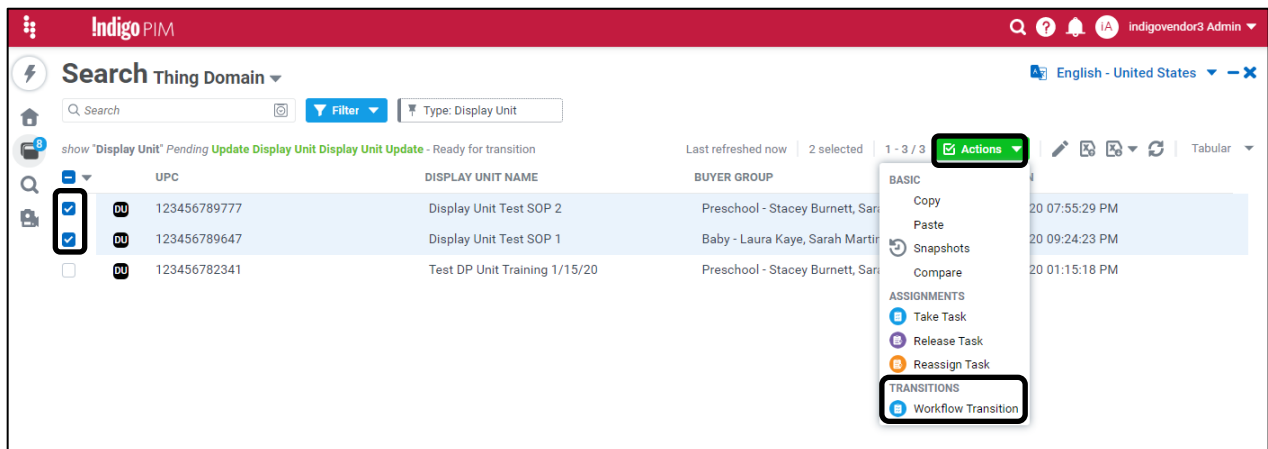


Fig. 12-2 Publish Multiple

8. Click on **Publish**

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

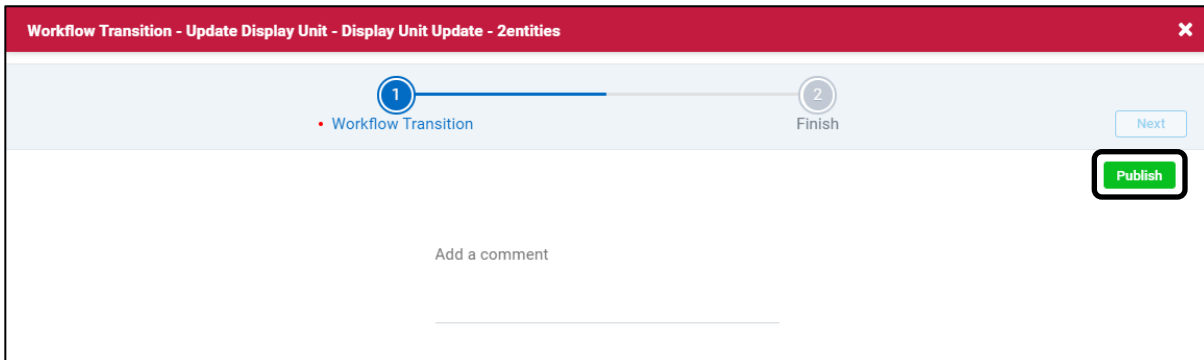


Fig. 12-3 Publish Multiple

9. Click on **Finish & Close**

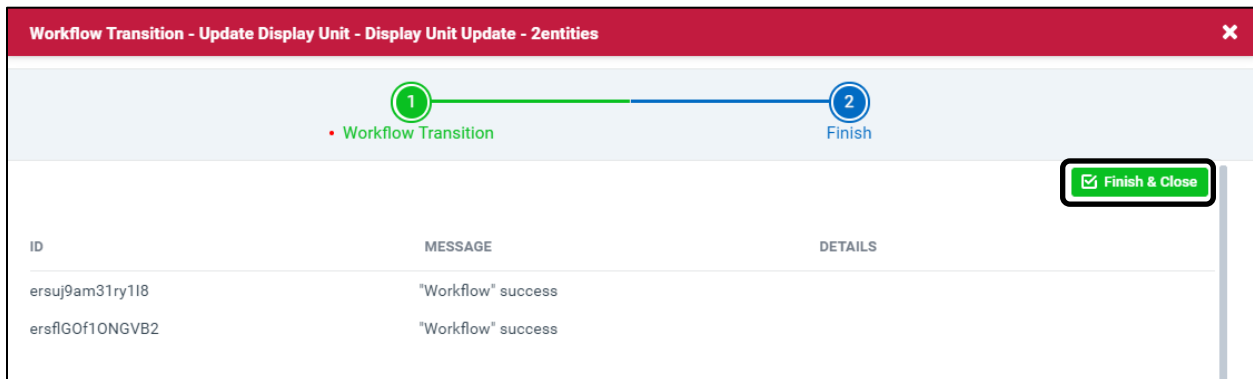


Fig. 12-4 Publish Multiple

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