

USER GUIDE

CATALOG SETTINGS

Version 1.5

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MANAGE ATTRIBUTES

To help to adjust the PIM application to your needs, Akeneo PIM enables you to define attributes. For example, if you need to capture data about the weight of your products, you can add an attribute type as 'metric'.

You will be able to select the most appropriate attribute type for your needs, please refer to the section below. For example, you can choose to create a field as a text, in which users can write what they want, or as a drop down list with a selection of values, forcing users to select from a list of predefined options.

Once you have created a new attribute (see below), you'll need to assign it to one or more families or directly to a product to make it available to users.

To learn more on how the attributes and products interact, please refer to "Adding attributes to a product" or "Add attributes to a family" section.

Attributes are always optional data fields. This means that all attributes can be with no values for the products except the SKU, which identifies a product, and is therefore mandatory with a value entered as of you create a product.

View Attributes

To start, go to Settings > Attributes. From this page, you will have several options to work with the datagrid of attributes as described below.

Page numbering

The attribute datagrid displays a page number. All attributes are displayed in the datagrid per set of N attributes. The number of attributes is indicated at the top right of the grid.

This number of attributes per page can be amended if you click on the drop down list to select another number:



The screenshot shows a datagrid interface for managing attributes. At the top right, there is a 'View per page:' dropdown menu currently set to '10'. Below it, a dropdown menu is open, showing options for 10, 25, 50, and 100. To the right of the dropdown are 'Refresh' and 'Reset' buttons. The datagrid has columns for 'SCOPABLE', 'LOCALIZABLE', 'GROUP', and 'PART'. The first two columns contain checkboxes. The 'GROUP' column shows 'Technical' for two rows.

| SCOPABLE | LOCALIZABLE | GROUP | PART |
|--------------------------|--------------------------|-----------|------|
| <input type="checkbox"/> | <input type="checkbox"/> | Technical | |
| <input type="checkbox"/> | <input type="checkbox"/> | Technical | |

Note

This number is not taken in account as a contextual element of work.

This means for instance, that when you leave the page to view and edit an attribute, and you go back to the page of the screen display of the attribute datagrid, then the number of attributes per page comes back to the initial configuration, which is “10”.

In order to navigate through the different pages of the attribute datagrid, the navigation buttons “next” and “previous” are available above the grid. Eventually, the page number is displayed at the center. You can directly go to a specific page by amending the field of the ongoing page number.



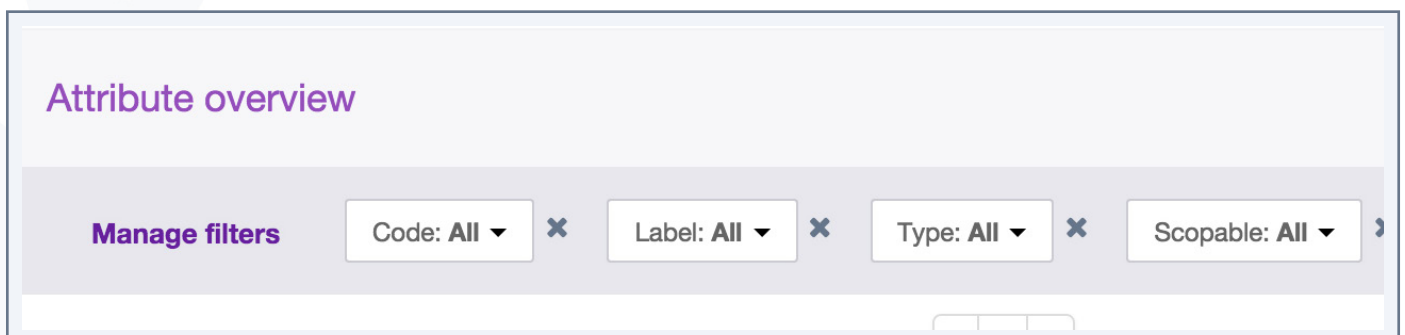
The screenshot shows a filter bar with five dropdown menus: 'Code: All', 'Label: All', 'Type: All', 'Scopable: All', and 'Localizable: All'. Below the filter bar is a pagination control showing 'Page: < 1 > of 6 | 55 records'. Below the pagination is a table header with three columns: 'LABEL', 'TYPE', and 'SCOPABLE'.

Note

The navigation through the pages of the attribute datagrid is not taken into account as a contextual element of work. This means that when you leave the page to display an attribute and go back to the attribute datagrid, then the page number comes back to the original configuration, which is “1”.

The filters

The attribute datagrid comes with a filter bar.



The screenshot shows the 'Attribute overview' section with a filter bar. The filter bar includes a 'Manage filters' button and four dropdown menus: 'Code: All', 'Label: All', 'Type: All', and 'Scopable: All'. Below the filter bar is a table header with three columns: 'LABEL', 'TYPE', and 'SCOPABLE'.

1. Enter your criteria. If the displayed criteria are not sufficient or relevant you can add additional criteria by selecting from the list that appears via the “Manage filters” button.
2. The grid is automatically updated when a new filter is added.

Labels filters are localised: If an attribute has a label in the locale preference, then this wording is used. If there is no available language, then the attribute code will be displayed in brackets. For example: [COLOR].

Filters can be sorted out on the following attribute information:

- The code,
- The label,
- The attribute type,
- The “scopable” property,
- The “localizable” property,
- The group it belongs to,
- If there is a set of conditions and actions to execute the rule for a smart attribute (Enterprise Edition only).

Screening product attributes

To sort out the attributes, you can click on the column header in the datagrid.



Note

The following type of information cannot be used to sort out the list:

- The attribute type
- If it is a “Smart attributes”

Shortcut actions on each attribute

There is a set of actions available for each attribute, that you can find in the last column of the grid. The buttons are prompted when you hover your mouse over the line.

| | | | | |
|--------------------------|-------------------------------------|-----------|-------------------------------------|---|
| <input type="checkbox"/> | <input checked="" type="checkbox"/> | Technical | <input type="checkbox"/> | |
| <input type="checkbox"/> | <input type="checkbox"/> | Technical | <input checked="" type="checkbox"/> | |
| <input type="checkbox"/> | <input type="checkbox"/> | Technical | <input checked="" type="checkbox"/> |   |
| <input type="checkbox"/> | <input type="checkbox"/> | Technical | <input checked="" type="checkbox"/> | |
| <input type="checkbox"/> | <input type="checkbox"/> | Technical | <input checked="" type="checkbox"/> | |

Note

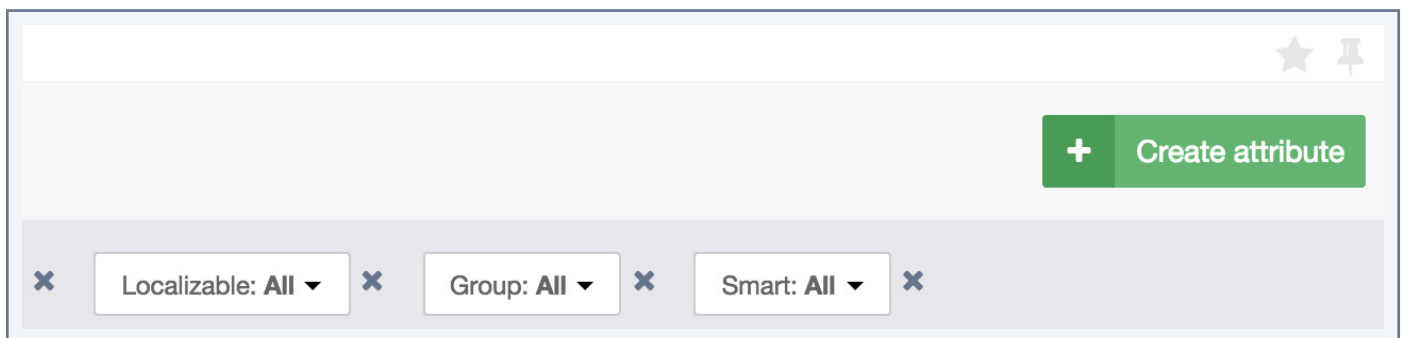
The shortcut actions are only displayed if you have been granted the appropriate rights

Create an attribute

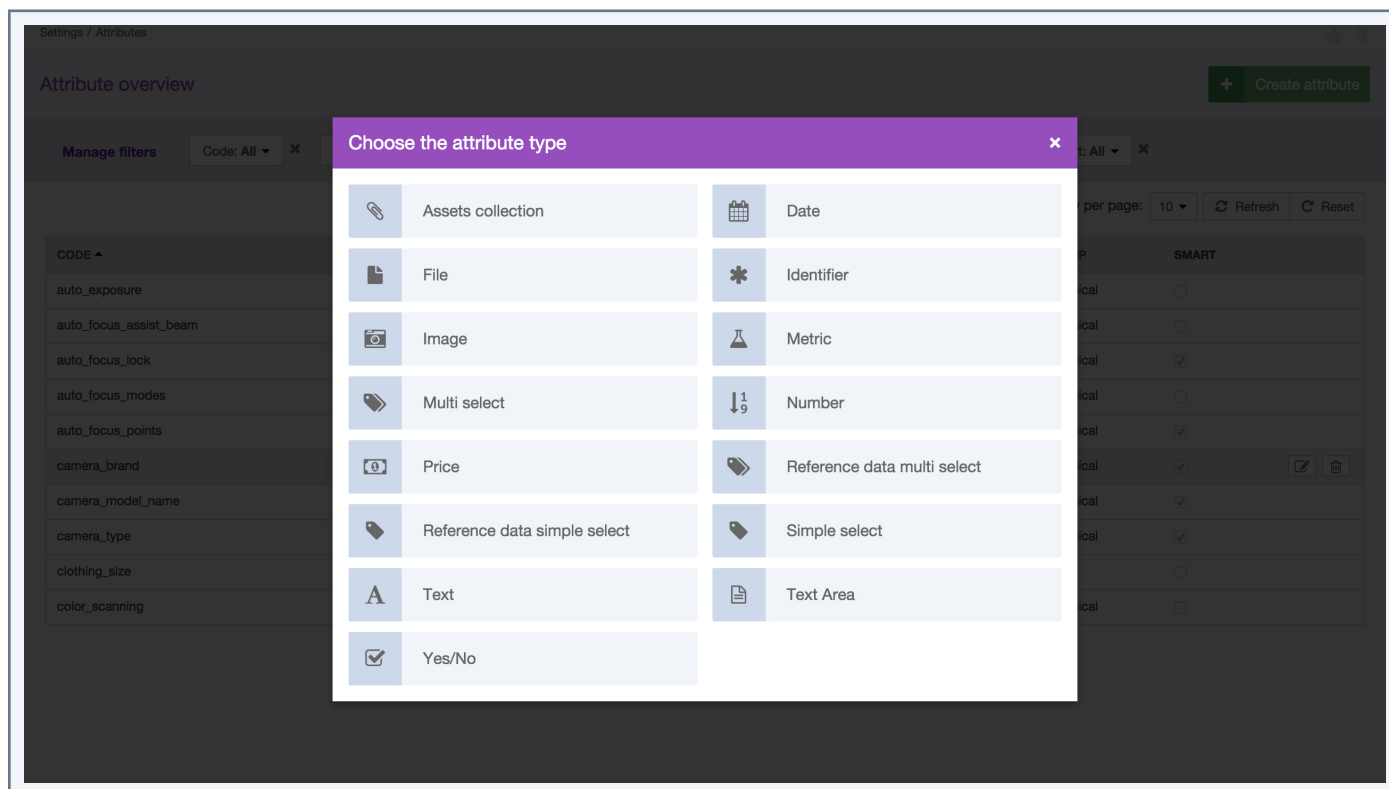
To create an attribute from the PIM user interface (without going through imports), you must have a specific permission. If you do not have it, please contact your administrator.

To create an attribute in the PIM:

1. Click on the “Create attribute” button.



2. Select the attribute type you want to create.



3. The Edit Attribute page is displayed. The following properties are required to create an attribute:

- A code
- A scope (global or per channel)
- Localization (global or local)
- Unique value (will be required according to the attribute type)
- Specific locale
- Attribute group
- Usable in grid (whether or not the attribute can be displayed as a column or used as a filter in products grids)

4. Click on the “Save” button.

The attribute has been created and some properties can be added or amended over time.


Edit the properties of an attribute

You can change the following properties of an attribute

- Labels: these are labels that appear when they are displayed in the PIM.
- Specific properties to attributes (see below)
- Options (for single or multi select attribute type only): these are predefined values that the user can select
- The attribute group: the group the attribute belongs to.

To edit an attribute:

1. Go to Settings > Attributes.
2. Select the attribute to edit in the datagrid and click on the line or on the shortcut.

| | | | | |
|--------------------------|-------------------------------------|-----------|-------------------------------------|---|
| <input type="checkbox"/> | <input checked="" type="checkbox"/> | Technical | <input type="checkbox"/> | |
| <input type="checkbox"/> | <input type="checkbox"/> | Technical | <input checked="" type="checkbox"/> | |
| <input type="checkbox"/> | <input type="checkbox"/> | Technical | <input checked="" type="checkbox"/> |   |
| <input type="checkbox"/> | <input type="checkbox"/> | Technical | <input checked="" type="checkbox"/> | |
| <input type="checkbox"/> | <input type="checkbox"/> | Technical | <input checked="" type="checkbox"/> | |

3. Change the properties and click on the Save button.

★ 📌

< 🗑️ Delete ✓ Save

Validation by setting properties for the different attribute types

Each attribute has specific properties to validate values:

- Date:
 - Min date: the earliest date that can be accepted
 - Max date: the latest date that can be accepted

- A short text field: text
 - Maximum number of characters: maximum number of characters that an attribute value can have.
 - Validation rule: how the value should be validated: such as an URL, as an Email, or using a regular expression.
- A long text field: text area
 - Maximum number of characters: like for the previous text attribute type
 - Enable WYSIWYG: activates the WYSIWYG feature.
- File and picture
 - Maximum size allowed in Mb
 - Allowed extensions files: png, jpg, pdf, doc, etc ...
- Metric
 - Allow negative values for the attribute
 - Allow decimal values for this attribute
 - Minimum value: the smallest value allowed
 - Maximum value: the largest value allowed
 - Metric family: family units of measurement to be used for the attribute (weight, dimensions, area, etc.)
 - The default unit of measurement
- Price
 - Allow decimals for the attribute values
 - minimum value: the smallest allowed value
 - maximum value: the largest allowed value
- Number
 - Allow negative values for the attribute
 - Allow decimals
 - Minimum value: the smallest allowed value
 - Maximum value: the largest allowed value

The single and multi select attribute types, as well as boolean attribute (yes / no) have no specific properties to validate the attributes.

Manage the attribute options

You can define values for single and multi-select attribute types. Options can be added, modified, sorted, or deleted.

The screenshot shows the 'Values' tab of the catalog settings. It is divided into two main sections: 'Label translations' and 'Options'.

Label translations: This section contains three input fields for different languages: German (Germany) with the value 'Hersteller', English (United States) with 'Brand', and French (France) with 'Marque'.

Options: This section includes a toggle for 'Automatic option sorting' set to 'No'. Below it is a table with the following data:

| Code | de_DE | en_US | fr_FR | Action |
|-------------|-------|-------|-------|-----------------|
| canon_brand | Canon | Canon | Canon | [Edit] [Delete] |
| nikon_brand | Nikon | Nikon | Nikon | [Edit] [Delete] |

An 'Add an option' button is located at the bottom right of the table.

The actions are instantly applied. You do not need to click on the “Save” button at the top of the page to apply the changes.







List attribute options

To edit an attribute options

1. Go to Settings > Attributes.
2. Select the attribute to edit, then click on the relevant row in the attribute datagrid.
3. Click on the “Values” tab.

Add an option





1. Click on “Add an option”.
2. Give a unique code to the new option.
3. Click on the confirm or cancel, button.

| en_US | fr_FR | Action |
|--|----------------------|---|
| | Canon |   |
| | Nikon |   |
| <input type="text"/> | <input type="text"/> |   |
| <input type="button" value="Add an option"/> | | |

The option is instantly created.

Edit option labels

1. Click on the “Edit” button to change the option code. A code is unique, it means that all the attribute options have different codes.
2. Click on the button to confirm or on the button to cancel.

| en_US | fr_FR | Action |
|--|-------|---|
| | Canon |   |
| <input type="text"/> | Nikon |   |
| <input type="button" value="Add an option"/> | | |

Sort out options

1. Drag and drop the rows to reorder options manually via the icon at the beginning of each row of options.

Options

Automatic option sorting **No** i

| Code | de_DE | |
|--|-------|-------|
| ☰ canon_brand | Canon | Canon |
| ☰ nikon_brand | Nikon | Nikon |

Delete an option

1. Click on the “delete” button to remove an option.

| en_US | fr_FR | Action |
|-------|-------|---|
| | Canon | ✎ 🗑 |
| | Nikon | ✎ 🗑 |

Add an option

A deleted option can no longer be used as a value for the attribute for a product. If a product had this value, the product has no value anymore for the attribute.

Enterprise Edition Note

An option that is used by a published product cannot be deleted.

View the rules applied to the attribute (Enterprise Edition)

The rules applied to attributes are available in the “Rules” tab from the attribute “edit” page.

The screenshot shows the Akeneo Settings / Rules page. At the top, there is a navigation bar with 'akeneo' logo and tabs for 'Collect', 'Enrich', 'Spread', 'Settings', and 'System'. Below the navigation bar, the page title is 'Settings / Rules'. There is a 'Manage filters' section with a dropdown menu set to 'Code: All'. Below this, there is a pagination control showing 'Page: < 1 > of 1 | 10 records' and a 'View per page: 10' dropdown with 'Refresh' and 'Reset' buttons. The main content is a table with three columns: 'CODE', 'CONDITION', and 'ACTION'.

| CODE | CONDITION | ACTION |
|----------------------------|--|--|
| camera_copy_name_to_model | If family.code in camcorders | Then name is copied into camera_model_name |
| camera_set_autofocus | If family.code in camcorders If name contains Canon | Then true is set into auto_focus_lock |
| camera_set_autofocus_point | If family.code in camcorders | Then 4 is set into auto_focus_points |

The display screen is composed of 3 vertical columns

- The rule code
- Conditions which are displayed below each other starting by “If”.
- The rule action, beginning with “Then”.

| CODE | CONDITION | ACTION |
|---------------------------|--|--|
| camera_copy_name_to_model | If family.code in camcorders | Then name is copied into camera_model_name |
| camera_set_autofocus | If family.code in camcorders If name contains Canon | Then true is set into auto_focus_lock |

The rules have to be read from left to right.

Note

A dedicated screen lists all the rules (Settings > Rules), the rules can be applied on attributes, categories, system attributes.

Delete a rule applied to the attribute

You have a “Delete” button to remove the rule at the end of each line in the datagrid.

A confirmation message validates the action of deleting a rule.

A deleted rule can no longer be executed by the rules engine. The values generated by the deleted rule are not changed, the products keep the values calculated by the deleted rule.

Check the attribute history

The change history made to an attribute take in account all actions carried out from the attribute page. For example: property changes, label changes, etc.

For each change, an attribute version is created. The following information is tracked down for each version:

- The person or system that generated changes,
- The date and time (up to seconds) at which the changes took place,
- The old value and the new value of each modified field.

To view the attribute versions:

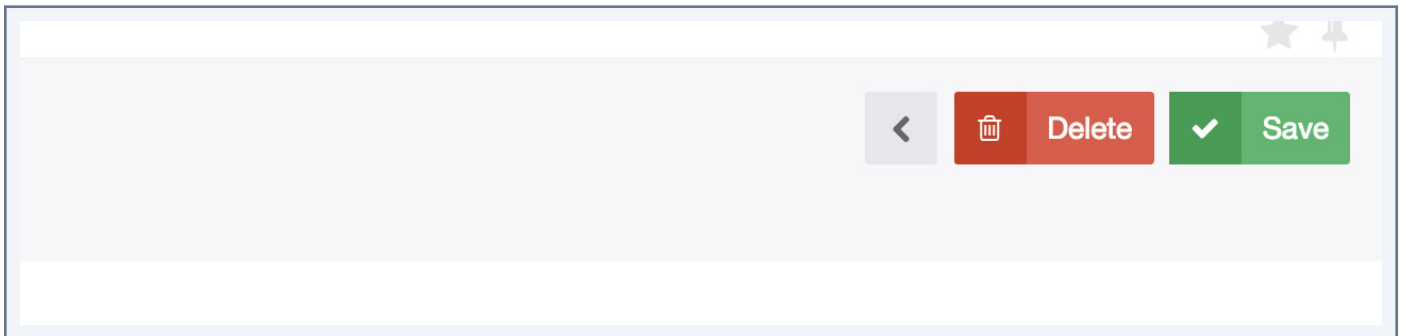
1. Open and edit the attribute page,
2. Click on the “History” tab and the list of version will be displayed.

Delete Attribute

An attribute can be removed. This means that all information concerning the attribute will be removed from PIM. Once you have confirmed the action, the action cannot be undone.



To remove an attribute, you have two ways to proceed:

- Via the attribute “edit” form:



- Open the attribute form you want to delete.
 - Click on the “Delete” button in the header of the attribute page.
 - Confirm the action in the popin.
- Via the shortcut in the grid:

A screenshot of a data grid showing several rows of attribute information. Each row has a checkbox on the left, a dropdown menu, and a "Technical" label. The third row is highlighted in light purple and has a trash can icon and an edit icon on the right side. The other rows have a checkmark in the rightmost column.

| | | | | |
|--------------------------|--------------------------|-----------|-------------------------------------|---|
| <input type="checkbox"/> | | Technical | <input type="checkbox"/> | |
| <input type="checkbox"/> | <input type="checkbox"/> | Technical | <input checked="" type="checkbox"/> | |
| <input type="checkbox"/> | <input type="checkbox"/> | Technical | <input checked="" type="checkbox"/> |   |
| <input type="checkbox"/> | <input type="checkbox"/> | Technical | <input checked="" type="checkbox"/> | |
| <input type="checkbox"/> | <input type="checkbox"/> | Technical | <input checked="" type="checkbox"/> | |

- Identify the attribute you want to remove from the attribute datagrid.
- Hover your mouse over the line of attribute in the grid, the button delete is prompted (“trash can icon”).
- Click on the “Delete” button.
- Confirm the action in the popin.

The attribute and all its relevant information have been deleted in Akeneo PIM.

Note (Enterprise Edition Only)


An attribute used by a product that is published, cannot be deleted.

MANAGE ATTRIBUTE GROUPS




View attribute groups

To help you to configure Akeneo to your needs, Akeneo PIM enables you to define attribute groups. These groups are used to bring attributes together. For instance, you can group all attributes for Marketing in a group named "Marketing". You can also add, delete, and define an order in groups.

Viewsonic 3DV5

Family: Camcorders  | Created: 2015-09-24 17:56:20 By John Doe - admin@exam... | Last update: 2015-09-24

- Attributes**
- Categories
- Associations
- Proposals

Ecommerce  English  

| | |
|------------------|----------------|
| Marketing | SKU |
| Technical | 8538374 |
| Media | Name |
| | Viewsonic 3DV5 |
| | Description |
| | ecommerce |

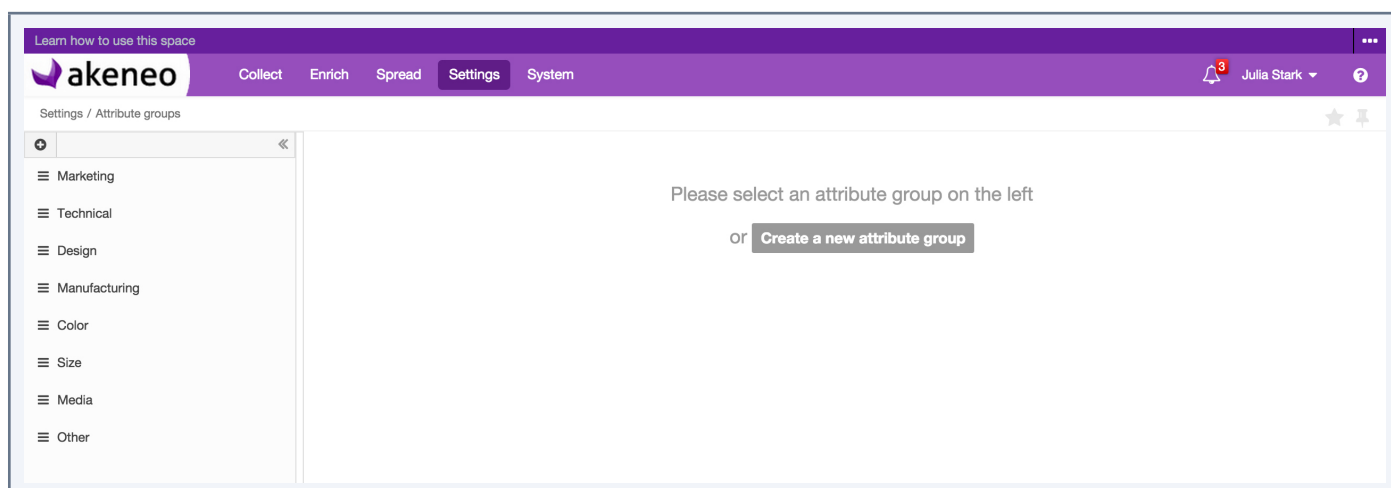
You can select the most appropriate labels as required.

Once you have created an attribute group and it will include at least one attribute for the product, the group will appear automatically.

If no attribute group is used for the product family nor directly added to the product, then the group does not appear in the product page when you edit your product form.

Notes: The attribute groups are optional

A default group has been labeled as “Other”. This is a group managed by Akeneo PIM, it cannot be deleted. If you do not create an attribute group, all product forms will only be composed of the group “Other.”



Check the history list of an attribute group

The change history made to an attribute group take into account all actions carried out from the page of the attribute group. For example: label change, attribute change, etc.

For each change, a version of the attribute group is created. The following information is tracked down for each version:

- The person or system that generated changes,
- The date and time (up to seconds) at which the changes took place,
- The old value and the new value of each modified field.

To view the versions of an attribute:

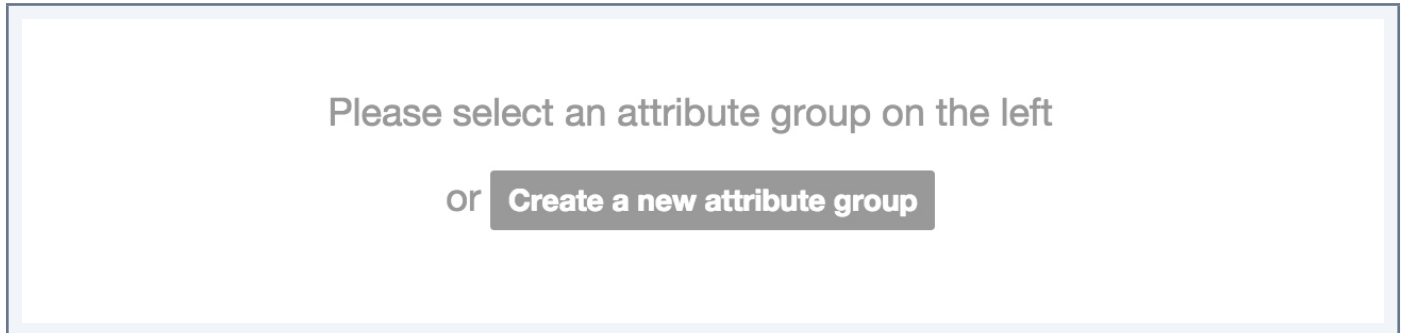
1. Open and edit the page of the attribute group,
2. Click on the “History” tab and the list of versions will be displayed.

Create an attribute group

To create an attribute group from the PIM interface, you must have specific permission to do so. If this is not the case, please contact your PIM administrator.

To create an attribute group:

1. Go to Settings > Attribute groups,
2. Click on “Create a new attribute group”,



3. The page of the new attribute group is displayed. Enter a unique code and a label,
4. Click on “Save”.

The attribute group is created.

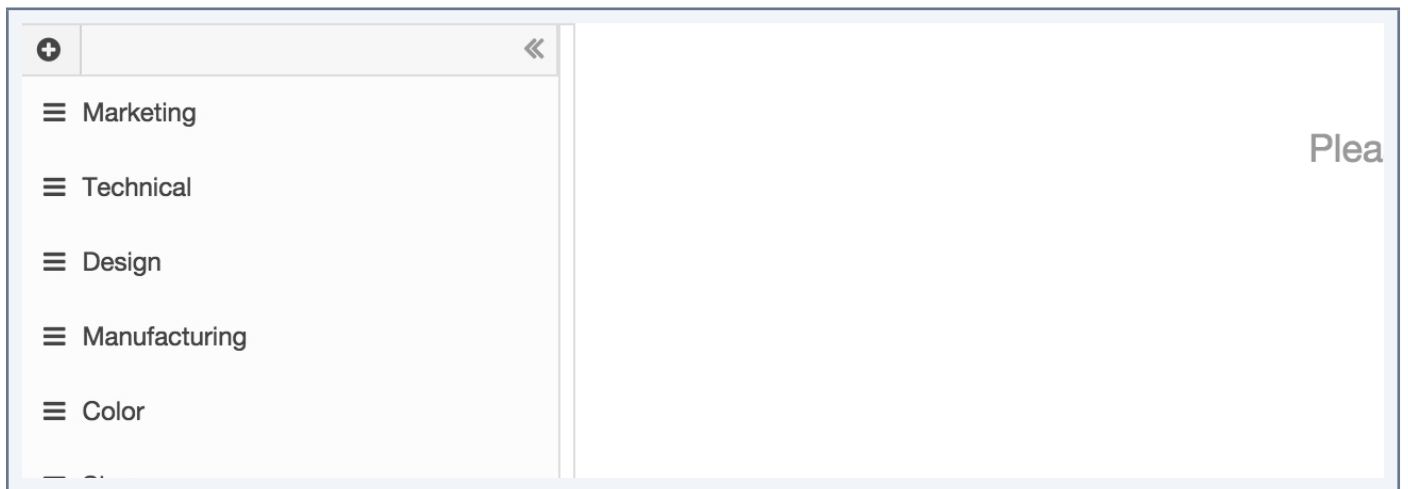
You can amend the attribute groups on the following items:

- Labels in the different locales that have been enabled for the catalog,
- The order for the group compared to other attributes,
- The attributes in the group.

Order the attribute groups

To order an attribute group:

1. Go to Settings > Attribute Groups,
2. Drag and drop attribute groups you want via this icon .



Edit the labels of an attribute group

To edit an attribute group:

1. Go to Settings > Attribute Groups,
2. Identify the attribute group to be edited in the left panel and click on the label,
3. The “edit” page is displayed. Change the labels, and click on the Save button.

Manage attributes in a group

Only the attributes in the “Other” group can be added to another attribute group.

Add Attribute

It is possible to add attributes to an attribute group.

From the attribute group “edit” form, “Attributes” tab:

1. Click on the “Add Attributes” button in the top right of the tab attributes of an attribute group.

| Name | Type | Scope |
|--------------------|------------|--------|
| SKU | Identifier | Global |
| Name | Text | Global |
| Response time (ms) | Number | Global |

OTHER

- Release date
- Price
- Description

2. Select the attributes to be added and click on their labels.

- You can find an attribute by its label via the quick search box at the top of the list.
- You can select all the attributes and click on the label of the attribute group “Other”

3. Click on the “add” button below the list.

The attributes are added to the group which is being edited.

| Name | Type | Scope | Localizable |
|--------------------|------------|---------|-------------------------------------|
| SKU | Identifier | Global | <input type="checkbox"/> |
| Name | Text | Global | <input type="checkbox"/> |
| Response time (ms) | Number | Global | <input type="checkbox"/> |
| Description | Text Area | Channel | <input checked="" type="checkbox"/> |
| Release date | Date | Channel | <input type="checkbox"/> |
| Price | Price | Global | <input type="checkbox"/> |

Note




If you do not see the button “Add Attributes” you more likely do not have the appropriate rights to add attributes. Should it be the case, please contact your administrator.

Remove an attribute

For each attribute added to a group, you have a delete button (trash can icon) displayed.

To remove an attribute:

1. From the “Attributes” tab of an attribute group, click on the “delete” icon to remove the relevant attribute.

| Attribute | Scope | Visible | Delete |
|------------|--------|--------------------------|---|
| Identifier | Global | <input type="checkbox"/> |  |
| Text | Global | <input type="checkbox"/> |  |
| Number | Global | <input type="checkbox"/> |  |

2. Confirm the action via the validation popin.

The attribute is set back in the group “other”, it can now be added to another group.

Sort out attributes

To order the attributes:

1. Go to Settings > Attribute Groups to open the attribute group.
2. Click on the attribute group to be edited in the left panel.
3. Click on the “Attributes” tab to display the list of attributes included in the group.
4. Drag and drop attributes via the icon.

| | Name | Type | Scope |
|---|--------------------|------------|---------|
| ☰ | SKU | Identifier | Global |
| ☰ | Name | Text | Global |
| ☰ | Response time (ms) | Number | Global |
| ☰ | Description | Text Area | Channel |
| ☰ | Release date | Date | Channel |
| ☰ | Price | Price | Global |

Delete an attribute group

Deleting an attribute group does not remove the attributes it includes. The attributes will be again positioned in the default attribute group “Other”.

To delete an attribute group

1. Go to “Settings > Attribute Groups” to list the attribute groups,.
2. Click on the attribute group to be deleted.
3. Click on the “Delete” button.
4. Confirm the action via the validation message.

MANAGE FAMILIES

To help you to adjust Akeneo PIM to your needs, Akeneo PIM enables you to define families. For example, if you need to manage products with common information (description), or specific values to their type (size shoes for the shoe product type), you can add a family "Shoe".

You can choose the appropriate attributes (see below) for each product family as needed.

Once you have created a new family (see below), you will be able to use it to create new products or amend existing products.

For further details on how families and products interact, please refer to the following sections: "Change the product family" or "Create a product."

Families are optional. This means that all products will be created without attributes and therefore will not be able to have the completeness calculated.

View families

Check the family history

The change history made to a family take in account all actions carried out from the family page. For example: property changes, label changes, etc.

For each change, a version of the family is created. The following information is tracked down for each version:

- The person or system that generated changes,
- The date and time (down to seconds) at which the changes took place,
- The old value and the new value of each modified field.

To view the family versions:

1. Open and edit the family tab.
2. Click on the "History" tab. The list of versions is displayed.

Create a family

To create a family in the PIM, you must be granted a specific permission to do so. If this is not the case, contact your administrator.

To create a family:

1. Go to Settings > Families.
2. Click on the “Create family” button.
3. The creation of a family popin is prompted. Enter a unique code.
4. Click on “Save”.

The family is now created.

You can amend the following family information:

- The family labels in the different enabled locales for the catalog,
- The attributes in the family: add / remove / if it needs to be taken into account for the completeness or not,
- Which attribute to be used as a “title” in the product page in this family.

Edit a family label

To edit the family properties:

1. Go to Settings > Families.
2. Identify the family to be edited in the datagrid and click on the line.
3. The “edit” page is displayed. In the “Properties” tab, change the labels and click on the “Save” button.

Manage the attributes in a family

Only the attributes that are not already in the family can be added to a family because an attribute can only be used once in each family.

Add an attribute

From the “edit” family form, “Attributes” tab:

1. Click on “Add Attributes” in the top right of the “Attributes” tab of a family.

| LABEL | ECOMMERCE | MOBILE |
|------------------|-----------|--------|
| Marketing | | |
| SKU | ✓ | ✓ |
| Name | ✓ | ✓ |
| Description | ✓ | ✓ |
| Release date | ● | ● |
| Price | ✓ | ✓ |
| Technical | | |
| Weight | ● | ● |

2. Select the attributes to add and click on their respective labels.

- You can identify an attribute label via the quick search box above the list.
- You can select all the attributes without an attribute group via the attribute group label “Other”

3. Click on the “add” button below the list.

The attributes are added to the family that is being edited.

| LABEL | ECOMMERCE | MOBILE | PRINT |
|------------------|-----------|--------|-------|
| Marketing | | | |
| SKU | ✓ | ✓ | ✓ |
| Name | ✓ | ✓ | ✓ |
| Description | ✓ | ✓ | ✓ |
| Release date | ● | ● | ● |
| Price | ✓ | ✓ | ✓ |
| Technical | | | |
| Weight | ● | ● | ● |

Note

If you do not see the “Add Attributes” button, you may have not been granted the appropriate rights to add attributes. Please contact your administrator in this case.

Note

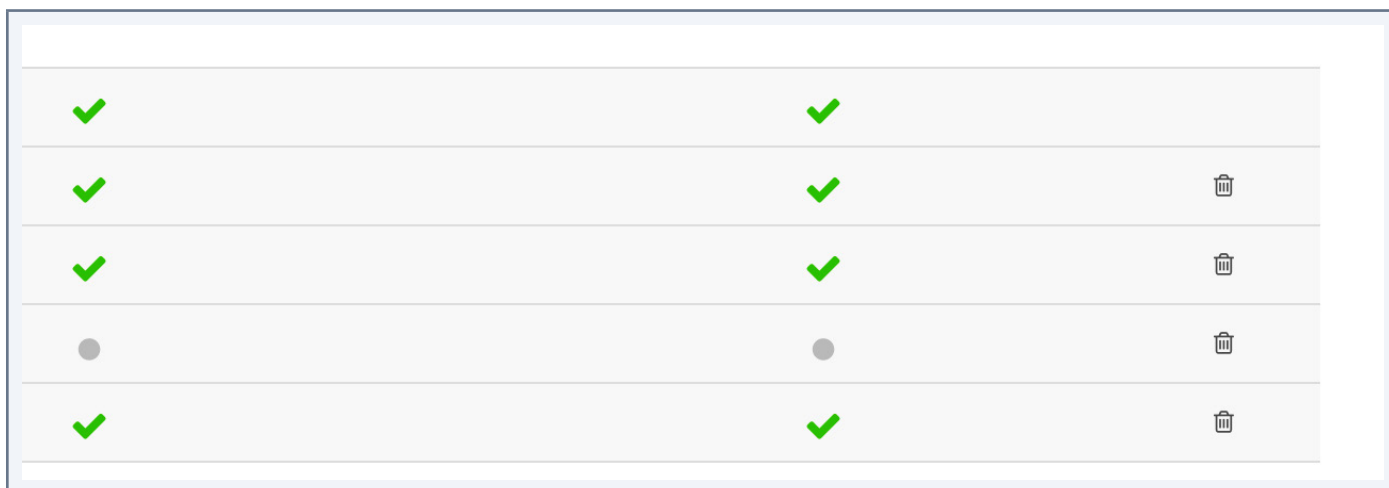
The attributes are sorted according to their order in their attribute group. They cannot be sorted by their inclusion in a family.

Remove an attribute

For each attribute added to a family, a delete button (trash can icon) is displayed

To remove an attribute from a family:

1. From the “Attributes” tab in the family page, click on the “delete” icon to remove the relevant attribute.



The screenshot shows a table with five rows. Each row has three columns. The first column contains a green checkmark (✓) in the first, second, third, and fifth rows, and a grey circle (●) in the fourth row. The second column contains a green checkmark (✓) in the first, second, third, and fifth rows, and a grey circle (●) in the fourth row. The third column contains a trash can icon (🗑️) in the second, third, fourth, and fifth rows. The first row is empty in the third column.

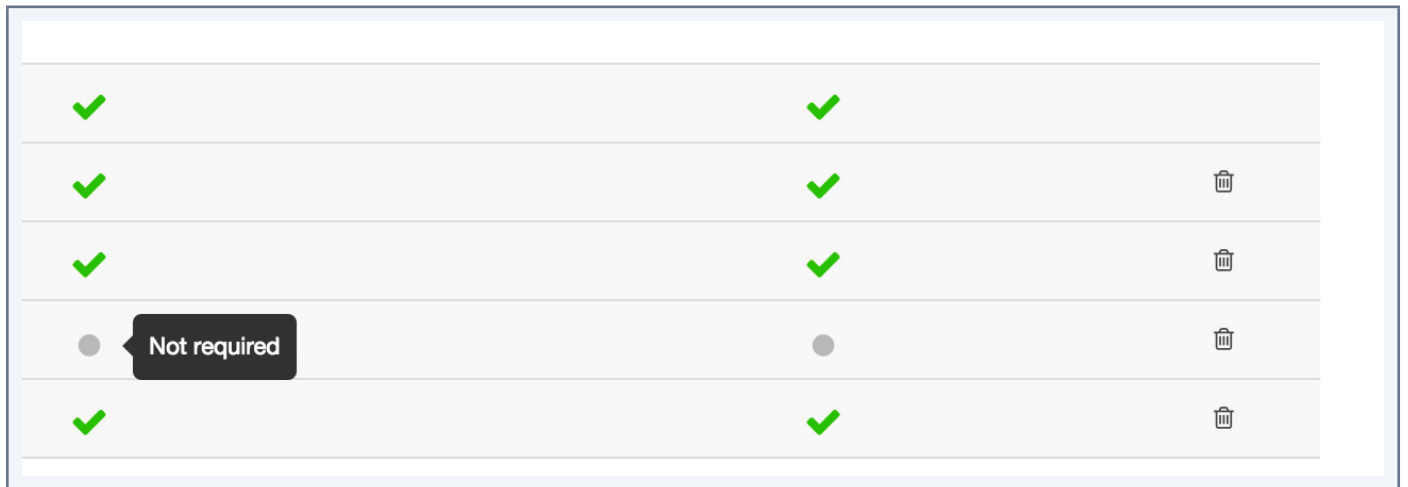
2. Confirm the action in the validation popin.

The attribute is available again, it can be added to the family once more.

Set a required attribute for a channel

When an attribute is added to a family, it is not set required for any channel by default. To set an attribute required for a channel:

1. Click on the point at the junction between the attribute line and the column of the channel to which the attribute should be taken into account to compute the completeness. The point is converted to a green “tick” status.
2. Click on “Save”.



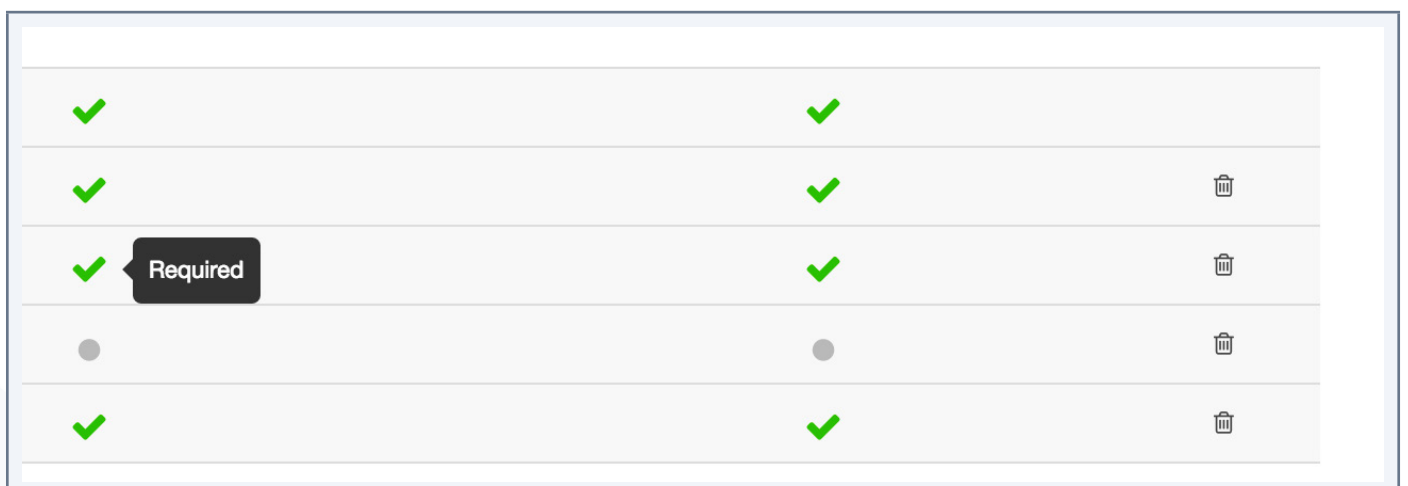
| | | |
|---|---|----|
| ✓ | ✓ | |
| ✓ | ✓ | 🗑️ |
| ✓ | ✓ | 🗑️ |
| ● | ● | 🗑️ |
| ✓ | ✓ | 🗑️ |

The attribute will be taken in account for the completeness computing. Completeness will be then updated when executed.

Remove an attribute required for a channel

To set a non-required attribute for a channel:

1. Click on the green “tick” at the junction between the line of the attribute and the column of the channel for which the attribute is taken into account to compute the completeness. The green “tick” status is converted to a point.
2. Click on “Save”.



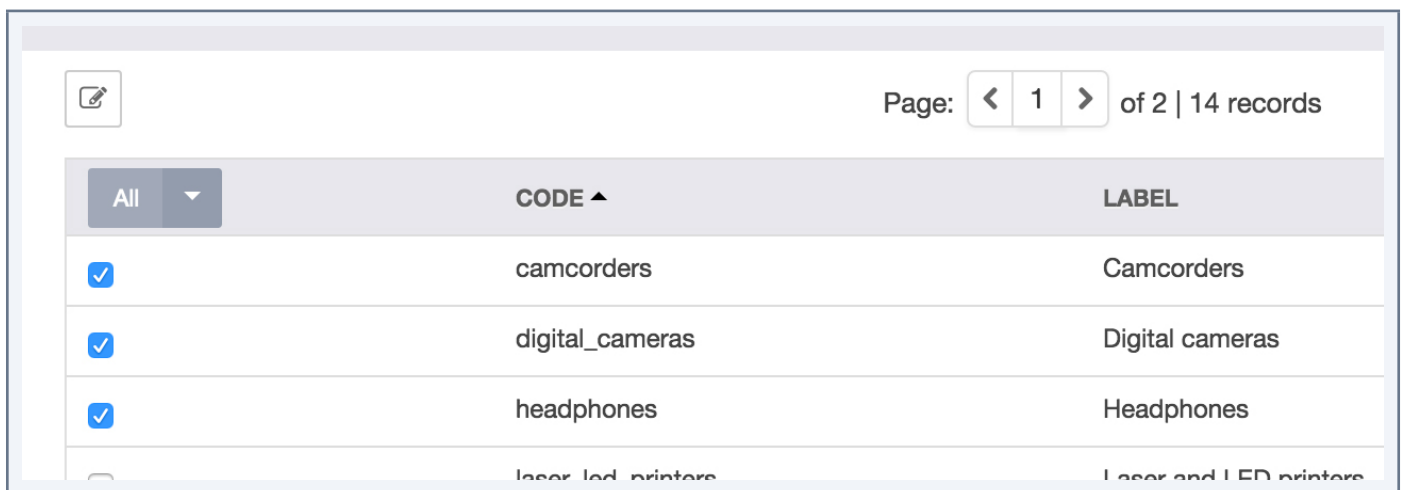
| | | |
|---|---|----|
| ✓ | ✓ | |
| ✓ | ✓ | 🗑️ |
| ✓ | ✓ | 🗑️ |
| ● | ● | 🗑️ |
| ✓ | ✓ | 🗑️ |

The attribute is removed from the completeness computing. Completeness will be updated then updated when executed.

Add the same attributes in several families

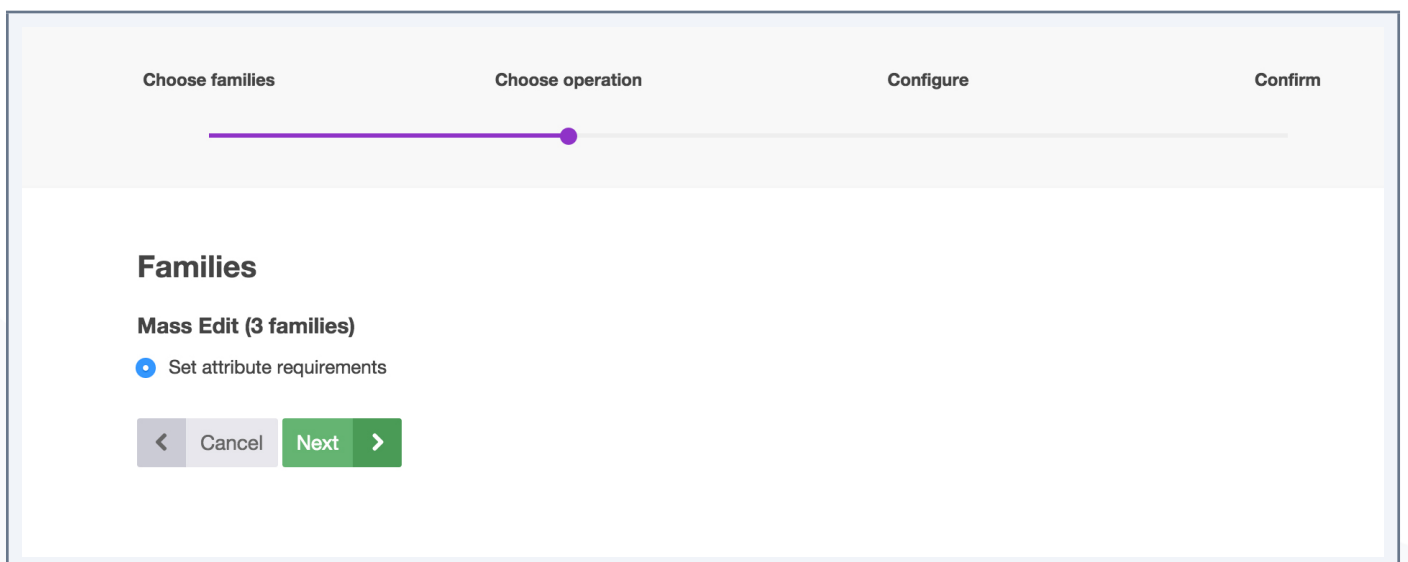
To add the same attributes in several:

1. Go to “Settings” > “Families” to display the family datagrid
2. Select the families for which the same attributes need to be added.
 - Click on “All” to select all the existing families
 - Click on “All visible” to select all the families display on screen.
 - Click on “No” to unselect all the families.
3. Click on the “Mass Edit” at the top left-hand side of the datagrid.



| All ▾ | CODE ▲ | LABEL |
|-------------------------------------|--------------------|------------------------|
| <input checked="" type="checkbox"/> | camcorders | Camcorders |
| <input checked="" type="checkbox"/> | digital_cameras | Digital cameras |
| <input checked="" type="checkbox"/> | headphones | Headphones |
| <input type="checkbox"/> | laser_led_printers | Laser and LED printers |

4. The mass edit wizard is displayed. Select the operation “set attribute requirements” and click on “Next.”



Choose families Choose operation Configure Confirm

Families

Mass Edit (3 families)

Set attribute requirements

5. The same screen as for a single family appears. Add the relevant attributes and set the attributes required for the product completeness of the channels (please refer to the dedicated sections to a family as the process is the same.)
6. Click on “Next” and validate the various steps until the confirmation message.

The attributes have now been added to families.

Delete a family

Deleting a family does not delete the attributes it includes, or the products associated with it. The attributes are always available and the products keep these very same attributes: they will become “optional” and the products with no family will have no longer completeness. The values are though maintained: there is no loss of product information.

To remove a family:

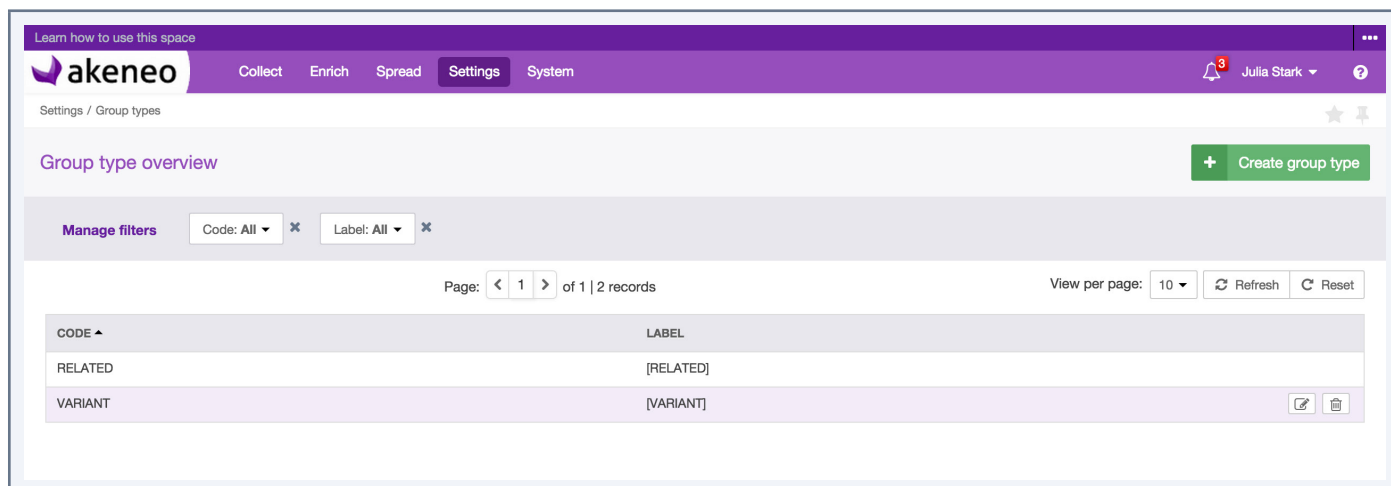
1. Go to “Settings > Families” to list the families.
2. Click on the family to be removed.
3. Click on the “Delete” button.
4. Confirm the action via the validation message.

Note (Enterprise only)

When a family is used by a product that is published, the family cannot be deleted.

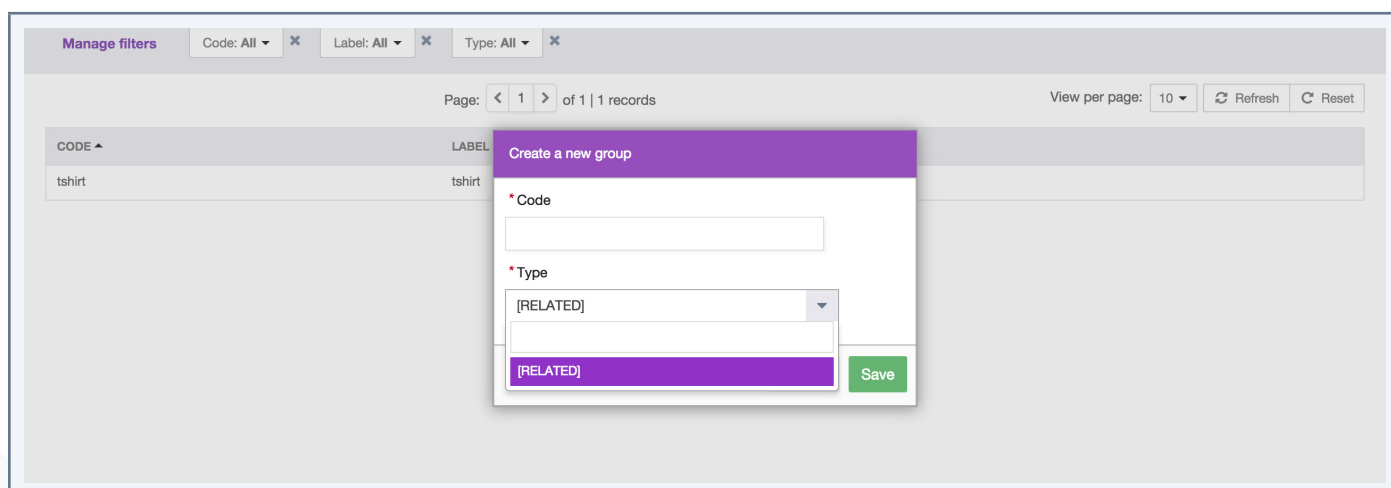
MANAGE THE GROUP TYPES

To help you to configure Akeneo PIM to your needs, Akeneo PIM enables to define product group types. These groups are used to bring products together. You can group all the products on a selection of products to create a gift list, for example a Baby Shower Gift List in a group named “Baby Shower Gift List”, the group type is “selected_gifts.”



You can select the most appropriate labels to your needs.

Once you have created a product group type, it can be used when creating a product group.



Groups types are required to create a product group. There is no default group. Akeneo advises to create a default group type with code “RELATED”.

The group type “VARIANT” is directly managed by the Akeneo PIM application, it cannot be removed.

Check the type group

To start, go to Settings > Group types. From the datagrid of the types groups page, there are many ways to work as described below.

Page numbering

The datagrid of group types displays a page number. All group types are displayed in the datagrid per set of N group types. The number of group types is indicated at the top right of the grid.

This number of group types per page can be changed if you click on the drop down list to select another number:



Note

This number is not taken in account as a contextual element of work. This means that when you leave the page to view and edit a group type for example, and you go back to the datagrid of the group type, then the number of group types per page comes back to the initial configuration, which is "10".

In order to navigate through the different pages of the group types datagrid, the navigation buttons "next" and "previous" are available above the grid. Eventually, the page number is displayed at the center. You can directly go to a specific page by changing the field of the ongoing page number.




Note

the navigation through the pages of the group type datagrid is not taken into account as a contextual element of work. This means that when you leave the page to display the group type form for instance, and go back to the group type datagrid, then the page number comes back to the original configuration, which is "1".

The filters

The group type datagrid comes with a filter bar.



The screenshot shows a user interface for managing group types. At the top, there is a header 'Group type overview'. Below it is a filter bar with a 'Manage filters' button on the left. To the right of the button are two filter boxes: 'Code: All' and 'Label: All', each with a dropdown arrow and a close 'x' button. At the bottom right of the filter bar, there is a pagination control showing 'Page: < 1 > of 1 | 2 records'.

1. Enter your criteria. If the displayed criteria are not sufficient or relevant you can add additional criteria by selecting from the list that appears via the "Manage filters" button.
2. The grid is automatically updated as a new filter is added.

Filters can be applied on the following attribute information:

- The code
- The labels

Screening the group types

To sort out the group types, you can click on a column header in the grid.

The shortcut actions on each group type

There is a set of actions available for each type of group, localised in the last column in the grid. The buttons are displayed when you hover your mouse over the line.



Note

The shortcut actions are displayed if you have been granted the appropriate rights.

There is no versioning available for the group types.

Create a group type

To create a group from the PIM user interface, you must have been granted specific permissions to do so. If not, please contact your administrator.

To create a group type:

1. Click on “Create group type”.
2. Select the group type code you want to create.
3. Confirm.

The group type has now been created and the edit page is displayed. Some properties can be changed or added.

Edit a group type

To edit a group:

1. Go to Settings > Group Type.
2. Click on the group type you want to edit in the grid.

The edit form is displayed. Only the labels can be edited for a group type. The code cannot be changed once created. Click on the “save” button to save your changes.

Delete a group type

To delete a group type:

1. Go to Settings > Group Types.
2. Click on the group type you want to remove from the grid.
3. Click on the “Delete” button.

The group type is deleted.

Note

If a group type is already used by at least one group, then the group type cannot be deleted: an error message appears to tell the user that the group type is used and therefore cannot be deleted.

MANAGE ASSOCIATION TYPES

To help you to configure Akeneo PIM to your needs, Akeneo PIM enables you to define the association types between products. These association types are used to link products together. For example, you can link your product to their substitute product in case of inventory shortage. The code for this association type will be "SUBSTITUTION".

| CODE | LABEL |
|--------------|--------------|
| PACK | Pack |
| SUBSTITUTION | Substitution |
| UPSELL | Upsell |
| X_SELL | Cross sell |

You can choose the most appropriate labels for your needs.

Once you have created an association type between products, it can be used while editing a product.

| IS ASSOCIATED | SKU | LABEL | FAMILY | STATUS | COMPLETE | CREATED | UPDATED |
|---------------|-------------|-------------|-----------|---------|----------|--------------|--------------|
| No | AKNTS_WPM | AKNTS_WPM | [tshirts] | Enabled | 86% | Sep 24, 2015 | Sep 24, 2015 |
| No | AKNTS_WPL | AKNTS_WPL | [tshirts] | Enabled | 86% | Sep 24, 2015 | Sep 24, 2015 |
| No | AKNTS_BPXL | AKNTS_BPXL | [tshirts] | Enabled | 86% | Sep 24, 2015 | Sep 24, 2015 |
| No | AKNTS_WPS | AKNTS_WPS | [tshirts] | Enabled | 86% | Sep 24, 2015 | Sep 24, 2015 |
| No | AKNTS_BPXXL | AKNTS_BPXXL | [tshirts] | Enabled | 86% | Sep 24, 2015 | Sep 24, 2015 |
| No | AKNTS_BPL | AKNTS_BPL | [tshirts] | Enabled | 86% | Sep 24, 2015 | Sep 24, 2015 |
| No | AKNTS_BPS | AKNTS_BPS | [tshirts] | Enabled | 86% | Sep 24, 2015 | Sep 24, 2015 |
| No | AKNTS_BPXS | AKNTS_BPXS | [tshirts] | Enabled | 86% | Sep 24, 2015 | Sep 24, 2015 |
| No | AKNTS_BPM | AKNTS_BPM | [tshirts] | Enabled | 86% | Sep 24, 2015 | Sep 24, 2015 |
| No | AKNTS_WPXS | AKNTS_WPXS | [tshirts] | Enabled | 86% | Sep 24, 2015 | Sep 24, 2015 |

The association types are mandatory to create a link between two products. There is no default association types.

View the association types

To start with, go to Settings > Association types. From this page, there are many ways to work with the association type datagrid, as described below.

Page numbering

The association type datagrid displays a page number. All association types are displayed in the datagrid per set of N association type. The number of association type is indicated at the top right of the grid.

This number of association types per page can be changed if you click on the drop down list to select another number:

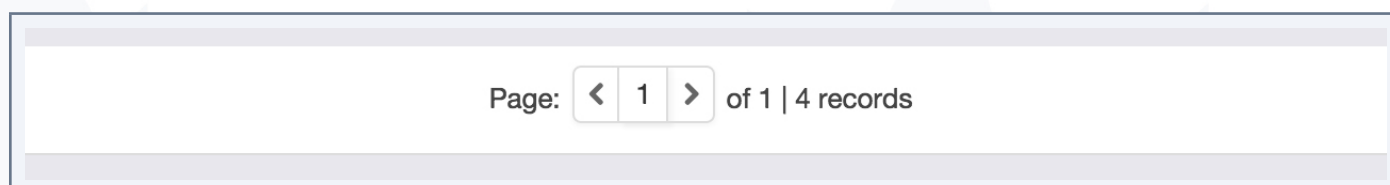


The screenshot shows a datagrid interface. At the top right, there is a 'View per page:' label followed by a dropdown menu currently set to '10'. The dropdown menu is open, showing options for 10, 25, 50, and 100. To the right of the dropdown are two buttons: 'Refresh' and 'Reset'. Below this, the datagrid has a header row with the word 'LABEL' and several data rows with the following labels: 'Pack', 'Substitution', and 'Insell'.

Note

This number is not taken into account as a contextual element of work. This means that when you leave the page to view and edit an association type for example, and go back to the datagrid of the association type, the number of association types per page comes back to its initial configuration, which is "10".

In order to navigate through the different pages of the association type datagrid, the navigation buttons "next" and "previous" are available above the grid. Eventually, the page number is displayed at the center. You can directly go to a specific page by changing the field of the ongoing page number.



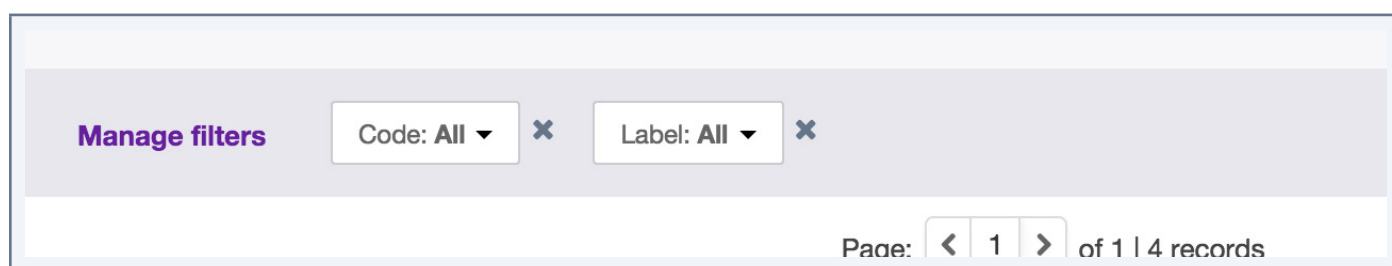
The screenshot shows the page navigation controls. It displays 'Page: < 1 > of 1 | 4 records'. The page number '1' is inside a box with left and right arrow buttons. To the right of the page number is a vertical bar separator followed by '4 records'.

Note

The navigation through the pages of the association type datagrid is not taken into account as a contextual element of work. This means that when you leave the page to display an association type form for instance, and go back to the page of the screen display of the datagrid of an association type, the page number comes back to its original configuration, which is "1".

Filters

The association type datagrid comes with a filter bar.



1. Enter your criteria. If the displayed criteria are not sufficient or relevant you can add additional criteria by selecting from the list that appears via the "Manage filters" button.
2. The grid is automatically updated as a new filter is added.

Filters can be applied on the following information



- The code,
- The labels

Screening the association types

To sort out the association types, you can click on a column header in the datagrid.

The shortcut actions on each association type

You will be able to find a set of actions available for each association type in the last column in the grid. The buttons are displayed when you hover your mouse over the line.

| LABEL |
|--|
| Pack |
| Substitution   |
| Upsell |
| Cross sell |

Note

The shortcut actions are displayed if you have been granted the appropriate rights.

Create an association type

To create an association type from the PIM user interface, you must have been granted specific permissions to do so. If this is not the case, contact your administrator.

To create an association type:

1. Click on the “Create a new association type” button.
2. Select the code of the association type you want to create.
3. Confirm.

The association type has now been created and the edit page is displayed.

Some properties can be changed or completed.

Edit an association type

To edit an association type:

1. Go to Settings > Association Types.
2. Click on the association type you want to edit in the datagrid.

The edit form appears. Only the labels can be edited for a type of association. The code cannot be changed once created. Click on the “save” button to save your changes.

Delete an association type

To remove an association type:

1. Go to Settings > Association types.
2. Click on the association type you want to delete from the grid.
3. Click on the “Delete” button.

The association type is then deleted.

Note

If an association type is used by at least one product, then the association type cannot be deleted: an error message is displayed to let the user know that the association type is used and cannot be deleted.

Check the association type history

The change history made to an association type take into account all actions carried out from the association type page. For example: property changes, label changes, etc.

For each change, a version of the association type is created. The following information is tracked down for each version

- The person or system that generated changes
- The date and time (up to seconds) at which the changes took place
- The old value and the new value of each field modified.

To view the versions of an association type:

1. Open & edit the association type page.
2. Click on the “History” tab. The list of versions will be displayed.

MANAGE CURRENCIES

You have 190 currencies available in the Akeneo PIM. The currency are used to set values for the “Price” attribute type. Currencies are available for all products in Akeneo PIM. The currencies are not based on locales.

When a “Price” attribute type is created, it can have as many values as needed as long as the relevant currency has been activated in the PIM.

Only activated currencies are used in the catalog.

View currencies

To view currency:

- Go to “Settings > Currencies”.

The currency datagrid supported in Akeneo PIM is displayed.

Currency overview

Manage filters Code: All x Activated: All x

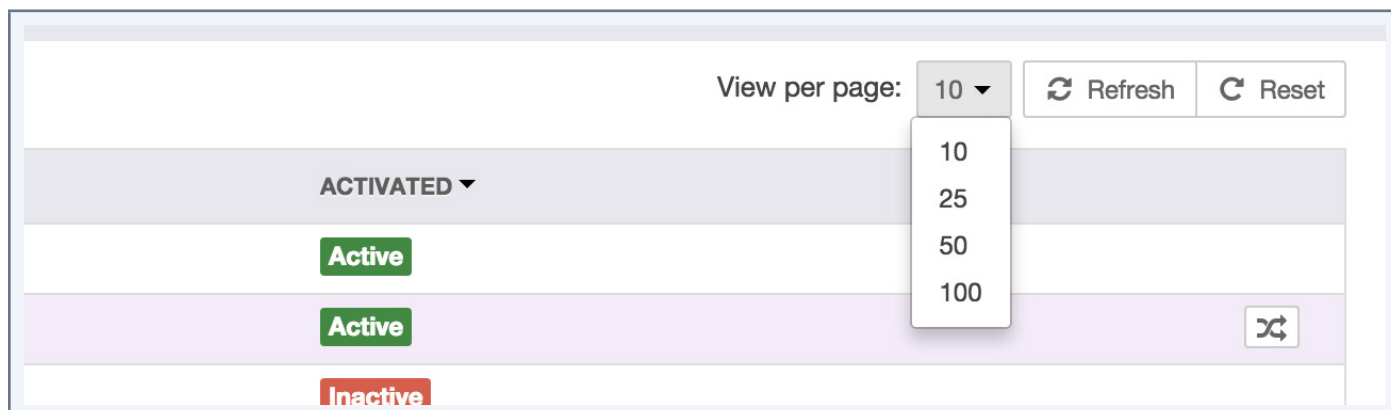
Page: < 1 > of 20 | 197 records View per page: 10 Refresh Reset

| CODE | ACTIVATED |
|--------------------------|-----------|
| EUR (Euro) | Active |
| USD (US Dollar) | Active |
| PAB (Panamanian Balboa) | Inactive |
| PKR (Pakistani Rupee) | Inactive |
| OMR (Omani Rial) | Inactive |
| NOK (Norwegian Krone) | Inactive |
| KPW (North Korean Won) | Inactive |
| NGN (Nigerian Naira) | Inactive |
| NIO (Nicaraguan Córdoba) | Inactive |
| NZD (New Zealand Dollar) | Inactive |

Page numbering

The currency datagrid displays a page number. All the currencies are displayed in the datagrid per set of N currencies. The number of currencies is indicated at the top right of the grid.

This number of currencies per page can be changed if you click on the drop down list to select another number.



Note

This number is not taken into account as a contextual element of work. This means that when you leave the page to view and edit a currency for example, and go back to the currency datagrid, then the number of currencies per page comes back to its initial configuration, which is “10”.

In order to navigate through the different pages of the currency datagrid, the navigation buttons “next” and “previous” are available above the grid. Eventually, the page number is displayed at the center. You can directly go to a specific page by changing the field of the ongoing page number.

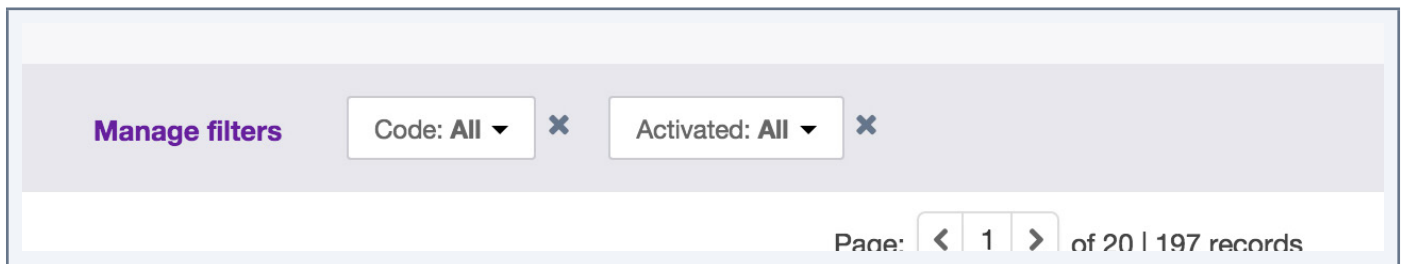


Note

The navigation through the pages of the currency datagrid is not taken into account as a contextual element of work. This means that when you leave the page to display a currency form for instance, and go back to the page of the screen display of the currency datagrid, then the page number comes back to its original configuration, which is “1”.

Filters

The currency datagrid comes with a filter bar.



1. Enter your criteria. If the displayed criteria are not sufficient or relevant you can add additional criteria by selecting from the list that appears via the “Manage filters” button.
2. The datagrid is automatically updated as a new filter is added.

Filters can be applied on the following currency information:

- The currency code,
- The currency statuses: enabled / disabled.

Screening currencies

To sort out the currencies, you can click on the column header in the datagrid.

Enable / disable a currency

For each currency, you will have a shortcut action to enable or disable the relevant currency in the last column in the grid. When you hover the mouse over the line, the “status” button appears.

Note

The shortcut action will be displayed if you have the appropriate rights.



To change the currency status: enable / disable, click on the button. The currency status will be changed, and the currency datagrid will be automatically updated to reflect the new status of the currency.

MANAGE CHANNELS

To help you to configure Akeneo PIM to your needs, Akeneo PIM enables you to set channels. For example, you need to disseminate product information to your website, to a mobile application or to a paper catalog generation tool. For this, you can create three channels in the PIM: “Ecommerce”, “Mobile” and “Print”

You can choose the most appropriate channel name for your needs, please refer. For example, you can choose to create a “Ecommerce PREPROD” channel and another channel “Ecommerce Prod” in order to adapt the dissemination of information to your technical environments (export all available information PREPROD example). This may be also “Print Collection” and “Print Coupon” in order to manage the creation of paper catalogs containing different products.

Once you have created a new channel (see below), all scopables attributes can have a specific value for this new channel. The channel can also be used to modify or create export profiles to suit your needs.

For more information on how to refer to a channel for an export profile, please refer to the “Edit Profile section export”.

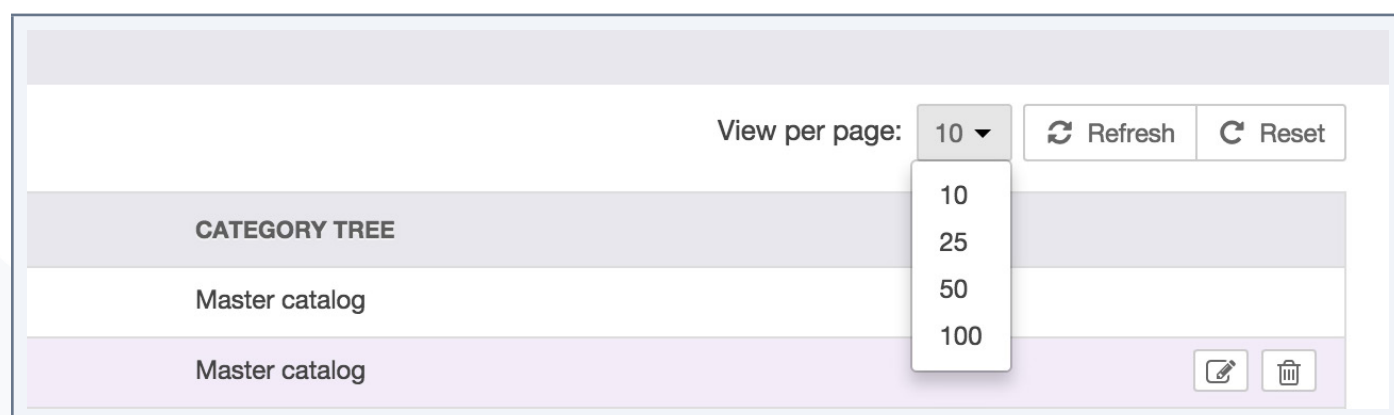
List channels

To start, go to Settings > Channels. From this page, there are many ways to work with the channel datagrid as described below.

Page numbering

The channel datagrid displays a page number. All the channels are displayed in the datagrid per set of N channels. The number of channels is indicated at the top right of the grid.

This number of channels per page can be changed if you click on the drop down list to select another number:



The screenshot shows a datagrid interface for managing channels. At the top right, there is a 'View per page:' dropdown menu currently set to '10'. Below it, a list of options is visible: 10, 25, 50, and 100. To the right of the dropdown are two buttons: 'Refresh' and 'Reset'. The datagrid itself has a header row with the text 'CATEGORY TREE'. Below the header, there are two rows of data, both labeled 'Master catalog'. The second row has two icons at the bottom right: an edit icon and a delete icon.

Note

This number is not taken into account as a contextual element of work. This means that when you leave the page to view and edit a channel for example, and go back to the channel datagrid, then the number of channels per page comes back to its initial configuration, which is “10”.

In order to navigate through the different pages of the channel datagrid, the navigation buttons “next” and “previous” are available above the grid. Eventually, the page number is displayed at the center. You can directly go to a specific page by changing the field of the ongoing page number.

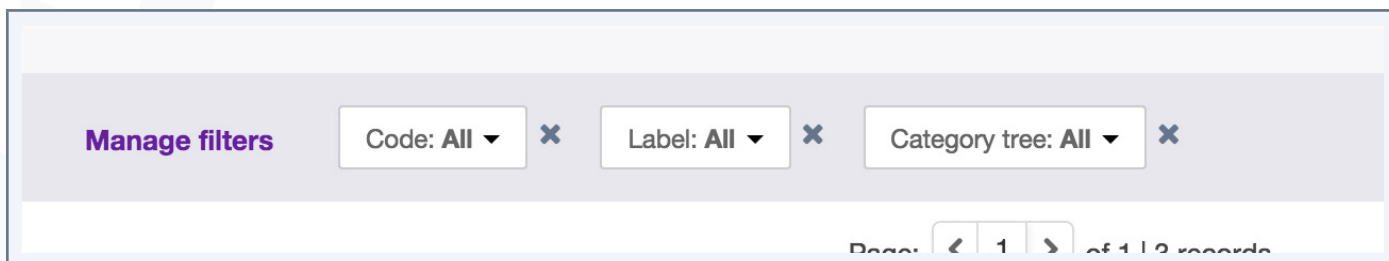


Note

the navigation through the pages of the channel datagrid is not taken into account as a contextual element of work. This means that when you leave the page to display a channel form for instance, and go back to the page of the screen display of the channel datagrid, then the page number comes back to its original configuration, which is “1”.

The filters

The channel datagrid comes with a filter bar.



1. Enter your criteria. If the displayed criteria are not sufficient or relevant you can add additional criteria by selecting from the list that appears via the “Manage filters” button.

2. The datagrid is automatically updated as a new filter is added.



Labels filters are localised: if a category tree has a label in the preferred locale, then the label is used. If there is no available label, then the tree code will be displayed into brackets. For example: [TOYS].

Screening channels

To sort out the channels, you can click on a column header in the grid.

Shortcut actions on each channel

For each channel, you will have a shortcut action in the last column in the grid. The buttons are displayed when you hover your mouse over the line.

| CATEGORY TREE | |
|----------------|---|
| Master catalog | |
| Master catalog |   |
| Master catalog | |

Note

The shortcut actions are displayed if you have been the appropriate rights.

Check the channel history

The change history made to a channel takes into account all the actions carried out from the channel page. For example: label change, attribute change, etc.

For each change, a version of the channel is created. The following information is tracked down for each version

- The person or system that generated changes,
- The date and time (down to seconds) at which the changes took place,
- The old value and the new value of each modified field.

To view the versions of a channel:

1. Open & edit the channel tab,
2. Click on the “History” tab, the list of versions will be displayed.

Create a channel

To create a channel from the PIM interface, you must have been granted specific permission to do so. If not, please contact your administrator.

To create a channel:

1. Click on the “Create channel” button. The creation form of a channel is displayed.
2. Provide information for all the mandatory fields in the property tab such as:
 - A unique code to identify the channel in the PIM,
 - The expected currencies for the channel,
 - The expected locales for the channel,
 - The expected category tree for the channel.

Note

This information is used to select which products will be exported to that channel (via the tree selection), and the product information to be exported to that channel (via the selection of locales and currencies).

3. Click on the “Save” button. The channel has now been created:

Some properties can be changed or added

Edit a channel

To edit a channel:

1. Go to the “Setting > Channels” menu.
2. Click on the channel to be edited in the channel grid,
3. The “edit” channel page appears. Make your changes and / or add information (note: only the code cannot be changed once created),
4. Click on the “Save” button.

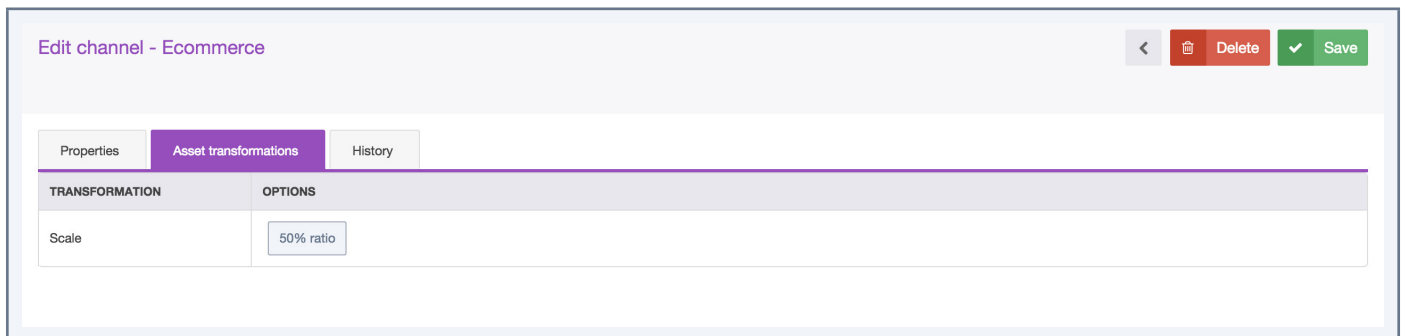
The channel is updated accordingly. The changes will be reflected in the PIM in the next few minutes.

View the channel information (not editable from the UI)

Assets Transformation

To consult the assets transformation for a channel:

1. Click on the channel to consult from the channel grid.
2. The page is displayed. Click on “Assets Transformation” tab.



Delete a channel

To delete a channel:

1. Go to the "Settings > Channels" menu.
2. Click on the channel to be removed from the channel datagrid,
3. The edit page is displayed. Click on the "delete" button,
4. Confirm the deletion.

The channel is deleted. The impacts will be reflected in the PIM just right after the deletion confirmation

MANAGE LOCALES

210 locales are available in Akeneo PIM. The locales are used to set values for attributes which may differ according to the relevant language / locale.

Locales are available for all products in Akeneo PIM. The locales are subject to channels: only those set in at least one channel will be activated automatically. The other way around, if a locale is NOT set to a channel, it is automatically disabled in the PIM.

When a localizable attribute is created, it can have as many values as needed as long as the relevant locale has been activated in the PIM.

Only activated locales are used in the catalog.

The currencies are not based on locales.

View locales

To view locales:

- Go to the “Settings > Locales” menu.

The locale datagrid supported in Akeneo PIM is displayed.

| CODE | ACTIVATED |
|--------|-----------|
| de_DE | Active |
| fr_FR | Active |
| en_US | Active |
| oc_FR | Inactive |
| nso_ZA | Inactive |
| nn_NO | Inactive |
| nl_NL | Inactive |
| nl_BE | Inactive |
| ne_NP | Inactive |
| nb_NO | Inactive |

Page numbering

The locale datagrid displays a page number. All the locales are displayed in the datagrid per set of N locales. The number of locales is indicated at the top right of the grid.

This number of locales per page can be changed if you click on the drop down list to select another number:



Note

This number is not taken into account as a contextual element of work. This means that when you leave the page to view and edit a locale for example, and go back to the locale datagrid, then the number of locales per page comes back to its initial configuration, which is “10”.

In order to navigate through the different pages of the locale datagrid, the navigation buttons “next” and “previous” are available above the grid. Eventually, the page number is displayed at the center. You can directly go to a specific page by changing the field of the ongoing page number.

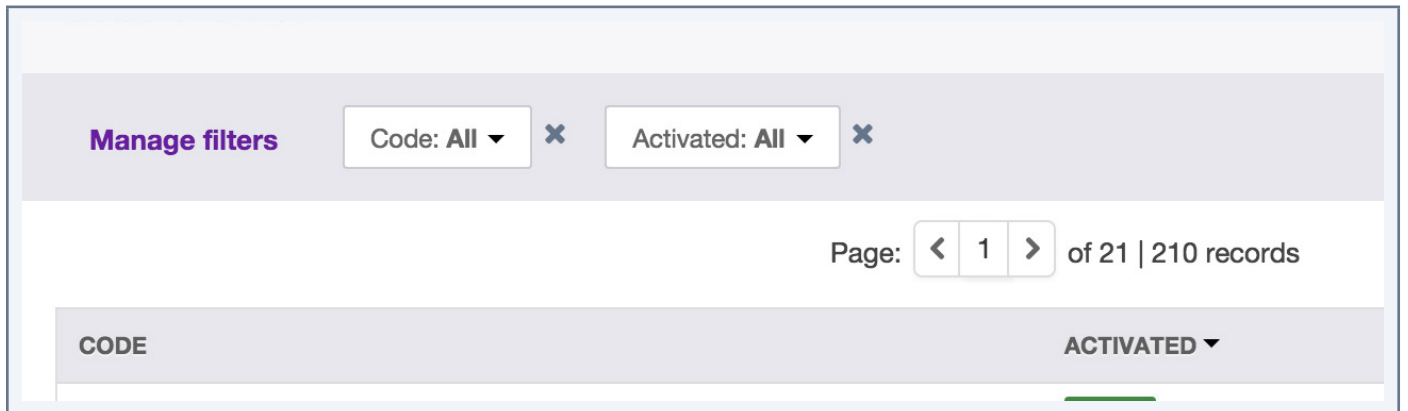


Note

the navigation through the pages of the locale datagrid is not taken into account as a contextual element of work. This means that when you leave the page to display a locale for instance, and go back to the page of the screen display of the locale datagrid, then the page number comes back to its original configuration, which is “1”.

Filters

The locale datagrid comes with a filter bar.



1. Enter your criteria. If the displayed criteria are not sufficient or relevant you can add additional criteria by selecting from the list that appears via the “Manage filters” button.
2. The grid is automatically updated as a new filter is added.

Filters can be applied on the following locale information

- The locale code,
- Its information status: active / inactive

Screening locales

To sort out locales, you can click on a column header in the grid.

LIST ALL RULES (ENTERPRISE EDITION)

View all rules

A dedicated screen Settings > Rules lists all the rules created which apply on attributes, categories, system attributes (status, completeness...).

Rules

Manage filters Code: All ✕

Page: < 1 > of 1 | 10 records View per page: 10 Refresh Reset

| CODE ^ | CONDITION | ACTION |
|---|--|---|
| camera_copy_name_to_model | If family.code in camcorders | Then name is copied into camera_model_name |
| camera_set_autofocus | If family.code in camcorders If name contains Canon | Then true is set into auto_focus_lock |
| camera_set_autofocus_point | If family.code in camcorders If name contains Canon | Then 4 is set into auto_focus_points |
| camera_set_camera_type | If family.code in camcorders If name contains Canon | Then compact is set into camera_type |
| camera_set_canon_brand | If family.code in camcorders If name contains Canon | Then canon_brand is set into camera_brand |
| copy_description_print_us_to_ecommerce_us | If family.code in camcorders | Then description [en print] is copied into description [en ecommerce] |
| set_purple_tshirt_ecommerce_description | If sku contains AKNTS_PB If main_color.code in purple | Then My very new description for purple tshirt is set into description [en ecommerce] |
| set_tshirt_price | If sku contains AKNTS_PB | Then €12.00 is set into price |

Delete a rule

You have a “Delete” button to remove the rule at the end of each line in the datagrid.

A confirmation message validates the action of deleting a rule.

Rules

Manage filters Code: All ✕

Page: < 1 > of 1 | 10 records View per page: 10 Refresh Reset

| CODE ^ | CONDITION | ACTION |
|---------------------------|--|--|
| camera_copy_name_to_model | If family.code in camcorders | Then name is copied into camera_model_name |
| camera_set_autofocus | If family.code in camcorders If name contains Canon | Then true is set into auto_focus_lock |

A deleted rule can no longer be executed by the rules engine. The values generated by the deleted rule are not changed, the products keep the values calculated by the deleted rule.

Note

If you do not see the button “Delete” you do not have the appropriate rights to delete a rule. Please contact your administrator to change your rights.

Create a rule

The rule cannot be created or updated on screen.

To create a rule, you have to import a YML file by executing the import job “Rule import in YML”.

For more details about the format of the file, please refer to our technical documentation.

For more details about how to execute an import, please refer to the user guide “user”, section “Launch an import”.

The rules can be exported to a YML file by executing the export job “Rule export in YML”.

For more details about how to execute an export, please refer to the user guide “user”, section “Launch an export”.

THANK YOU.