USER GUIDE

END-USER ROLE

Version 1.6

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GLOSSARY

Asset

An asset is used to represent a digital resource. A digital resource may be an image (illustration, photo,...), a video (animation,...), an audio file (music, podcast,...) or other multimedia or office documents.

Category

A category or a category tree is a hierarchical way to organize and classify products in a catalog in Akeneo PIM.

Akeneo can handle multiple classification product trees (no limitation), a default tree is mandatory, usually called “Master Catalog” category.

General rules concerning categories: a product can be classified in any one or more categories and/or in any one or more existing category trees.

A category is composed of a unique code to identify it and of labels that can be translated.

Channel

A channel in Akeneo PIM defines a selection of products and information to be exported via the use of an export profile.

For example, an e-commerce channel for the website, another channel for an iPad application.

A channel works like a filter on the catalog with the following properties:

- A tree of categories: to define the selection of products to export.
- One or several locales: to specify which values the channel requires (product information in French but not those in Italian, even if these values exist).
- One or several currencies: to define which price attribute values the channel requires (prices in Euros and Dollars, but not in Pounds).
- Completeness: to define which product information is mandatory for a product, it is configured per channel, at the family level. For instance: the product’s description must be exported for the e-commerce channel, but only the product’s name must be exported for the mobile channel.
- Statuses: disabled products are ignored by channels.

At least one channel must be created in the PIM.

Completeness

The completeness defines and tracks when a product's enrichment is complete.

A product is complete for a channel and a locale when all attributes defined as "required" (set at the family level) for this channel have values for these specific channel and locale.

Connector

Connectors are external modules implemented to interact with external systems and Akeneo PIM. They manage rules for reading a source of information and they export the information according to the needs of third-party applications.

Akeneo PIM provides a platform of connectors management: various services are available like the import configuration screen.

A connector can be generated to import data (products, categories, attributes...) from different sources (ERP, CSV files, XLSX files...) into Akeneo. Other connectors can be created to export, for instance, the products from Akeneo to a e-commerce platform such as Shopify, Drupal, Magento, etc.

Natively Akeneo proposes CSV and a XLSX connectors.

Family

In Akeneo, a product family is a set of attributes (or characteristics), which is defined by your product typology. For example, a family can be:

- A mug,
- A T-shirt,
- A pair of shoes.

Each product family has a code and a label that can be translated.

A product family can use all the attributes available in the PIM. Several families of products can use the same attributes.

This means that a product family is used as a product model: the set of attributes generates the product edit form automatically and each product belonging to the same family has the same attributes.

Example: the "Mug" family is composed of the following attributes:

- Name,
- Weight,
- Description,
- Color.

If a product belongs to the “Mug” family, the above attributes are automatically added to the product. These attributes cannot be removed from the product.

Any product can be part of a family, but a product can be without a family. In this case, the product has no default attributes.

A family can also define the completeness of products.

Locale

A locale is a combination of:

- A language (English, German, French...),
- A country (United States, United Kingdom, France...).

A locale is identified in Akeneo by 4 letters: 2 letters for the language (en, de, fr) followed by 2 letters for the country (US, UK, FR).
Examples of locales: British English (en_UK), American English (en_US).

A product in Akeneo can have different values per locale for some attributes (these attributes are “localizable”). Akeneo supports more than 200 locales.

Reference data

A reference data is a data that defines the set of permissible values to be used by other data fields. Reference data often represents business entities such as suppliers and materials with all the necessary detail (e.g., for suppliers: number, name, address, country and contact)

Variant group

A variant group is a type of product group. It is used to gather products that have common characteristics, like a product range for instance. A variant group has its own properties compared to the other types of product groups:

- A variant group has at least one variation axis (required). The variation axis allows to secure the unique combination of values for some attributes, in the products added to the group. For example, in a variant group for T-shirts with the following attributes used as axes “Color” and “Size”, there will be only one product with the values “Purple” for the attribute Color and “M” for the attribute Size in the group.
- (Optional) it has attribute values. A variant group may have some attribute values, in order to apply them for each product belonged to the variant group.

Notes

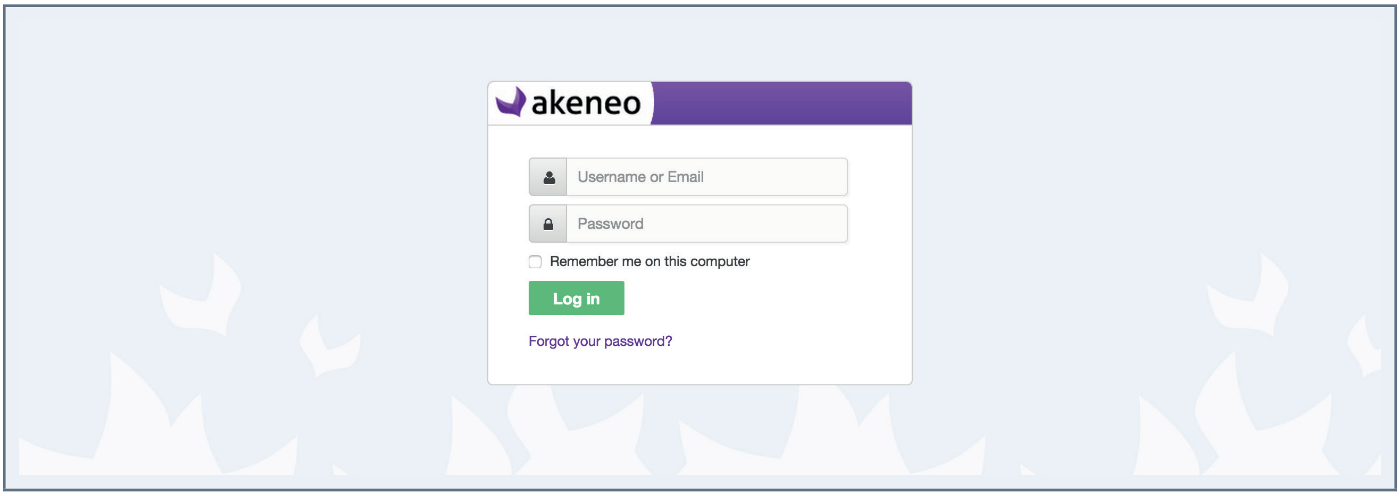
1 - A variant group does not allow you to set attributes for products (like families). Only attribute values are applied. E.g.: If an attribute is added to a variant group but no value is given, then the considered value is "" (empty) for all products in the group.

2 - Only simple select attributes can be used as variation axes to secure the unique combination of data.

FIRST STEPS INTO AKENEO PIM

Login

The login page will be displayed when you will not be connected to the application:



1. Enter your username and password,
2. Click on the “Log in” button.

The home page is displayed, also called Akeneo Dashboard.

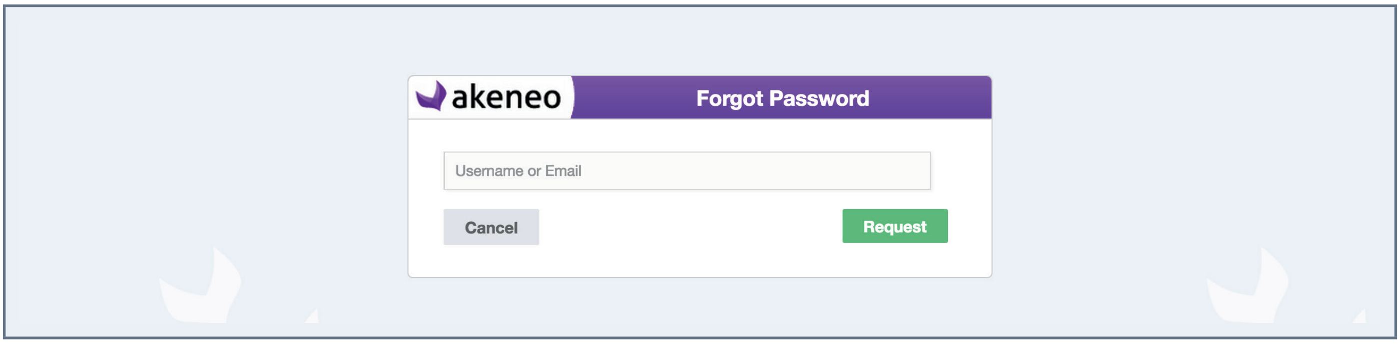
Note

Check the option “Remember me on this computer“ so that you will not have to re-enter your login information to connect to the PIM.

Recovering your password

1. Click on the “Forgot your password?“ link,
2. Type in your username or email address entered in your Akeneo user account,
3. Click on the “Request” button.

A link will be sent to this email. Follow the instructions to log in and change your password.



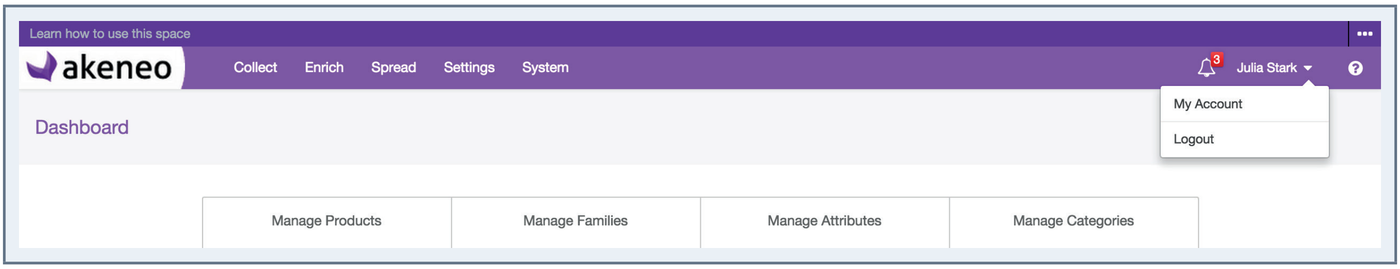
Note

If you do not know which email address is set in your Akeneo user account, please contact your Akeneo administrator.

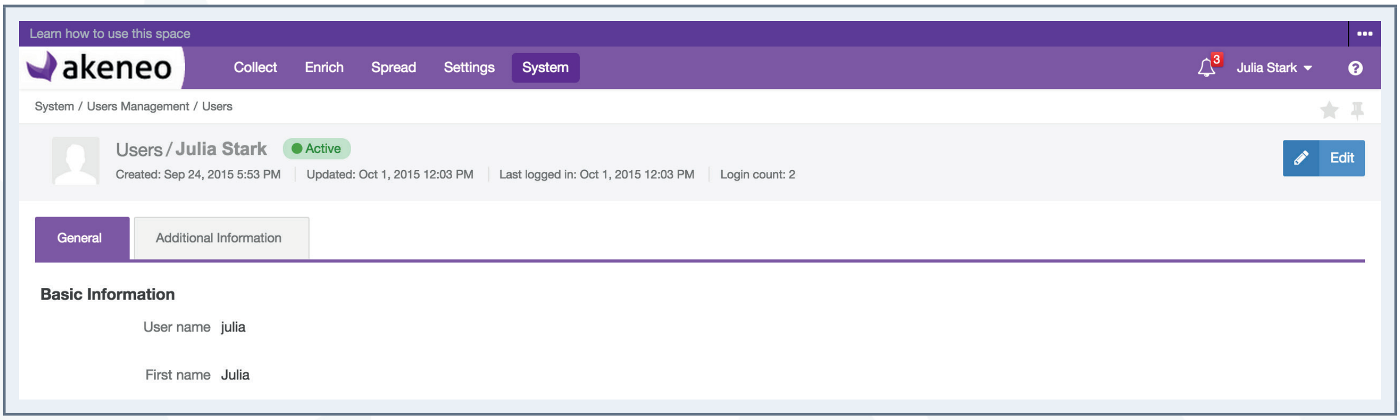
Changing your password

To change your password once you are logged into the application:

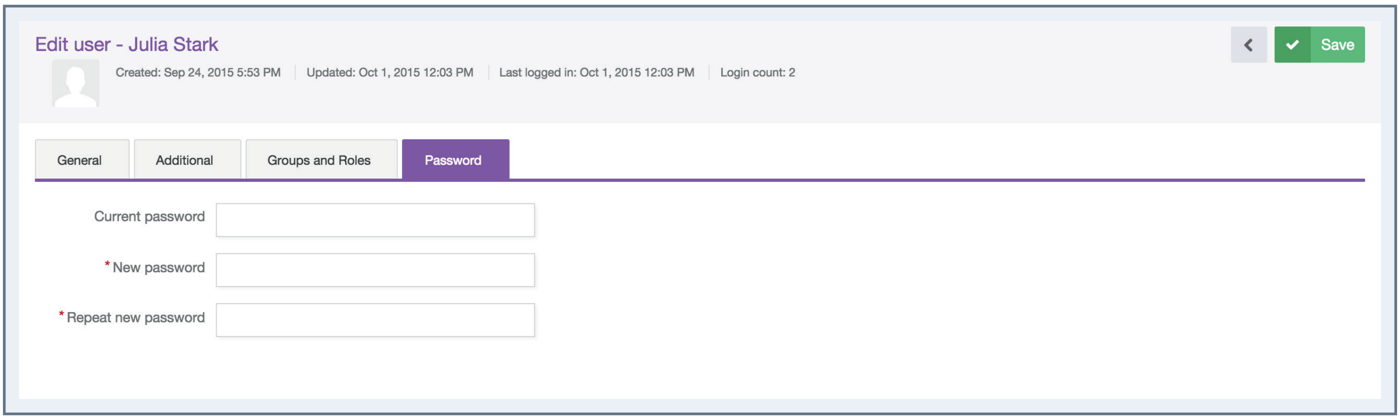
1. Click on your name at the top right hand corner and select "My Account",



2. Your profile is displayed. Click on the top right button,



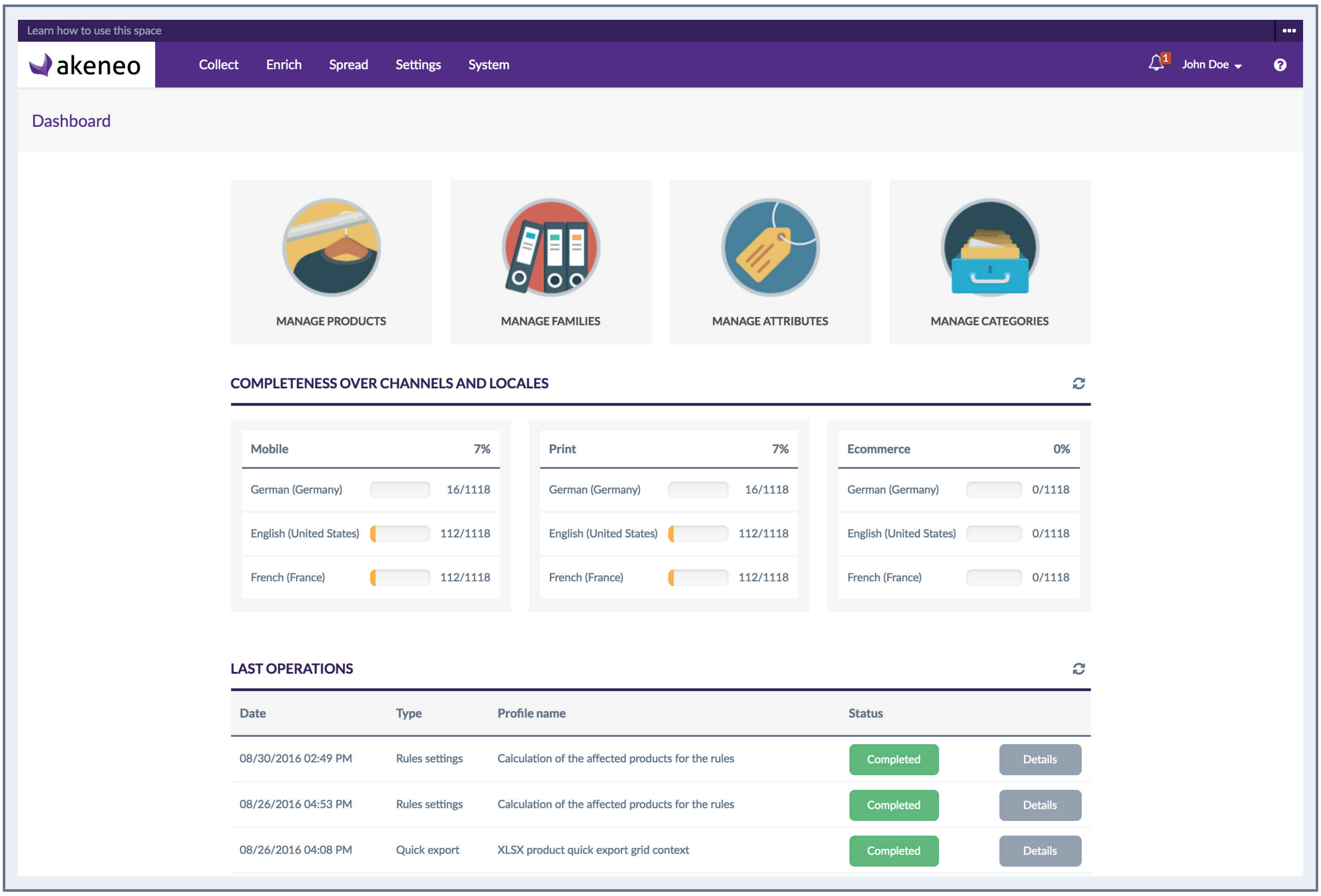
3. Your profile goes into edit mode. Select the password tab,



4. Fill in the fields as shown to change your password,
5. Click on the “Save“ button.

Your password has now been changed.

Exploring the working area in Akeneo PIM



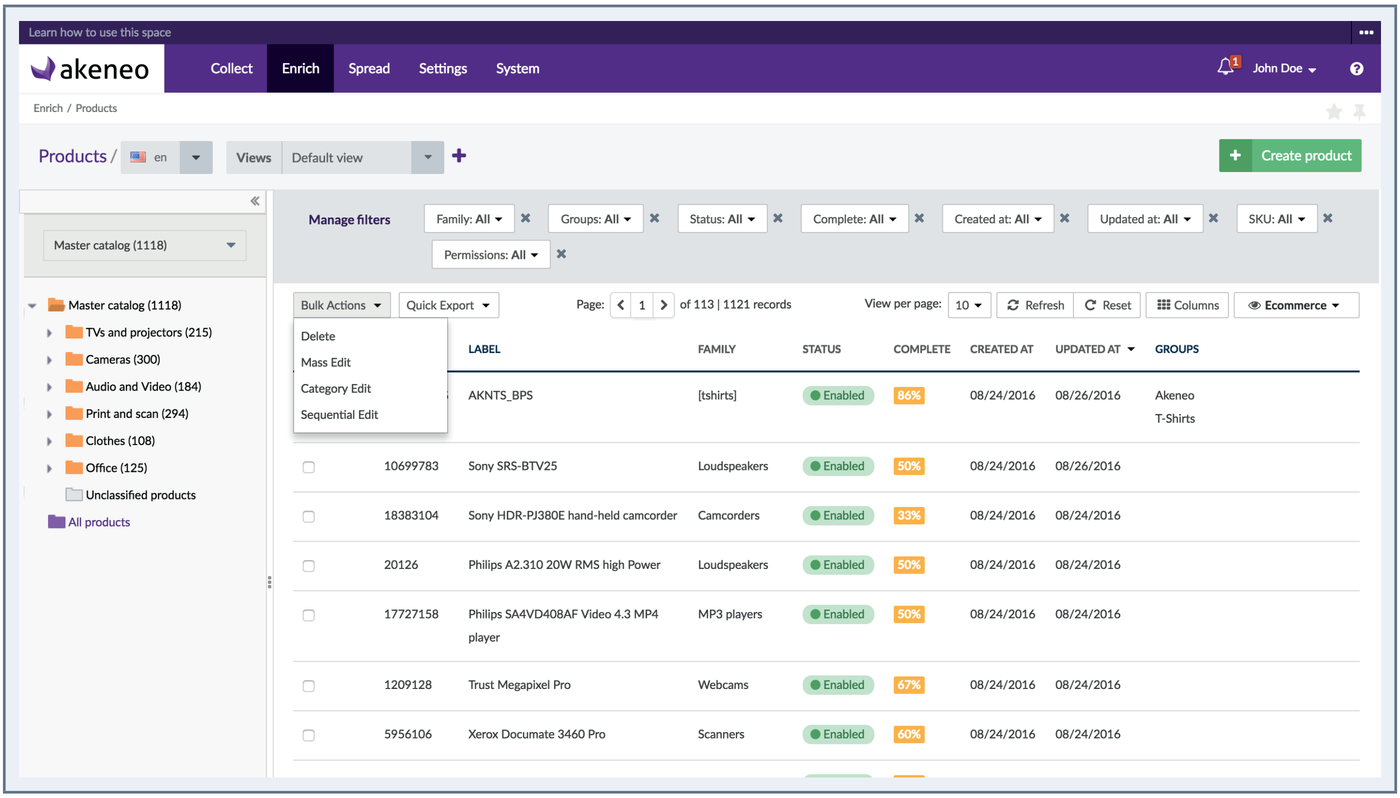
The Akeneo Dashboard is the page that appears by default when connecting to the PIM.

The navigation bar (top of the screen in lighter purple) is the same on all screens in Akeneo. This navigation bar displays the menu to access all the features available in Akeneo PIM.

The light grey part of the screen (below the purple bar) contains the path of your current page.

USING THE PRODUCT GRID

To start, go to Enrich > Products. From this page, there are many ways to work within the product grid below.



Locale / Channel context

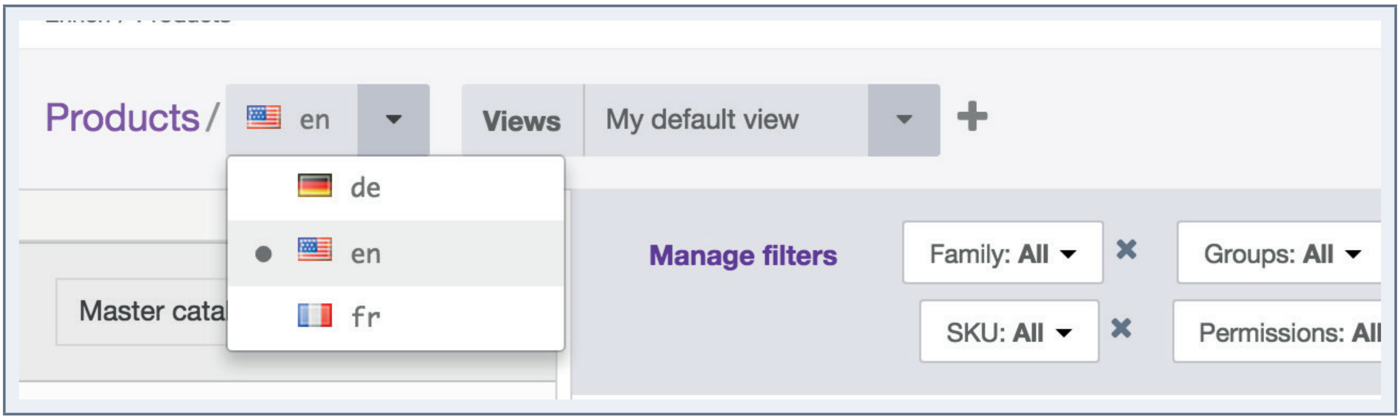
Setting the locale context

On the product grid page, you will find all your products. You can choose your working locale, if several locales have been activated. The locale selection will impact the following information on the page:

- The category labels (on the left panel),
- The attribute labels that can be used as filters (on the Manage filters panel),
- The labels of attribute groups,
- The option labels that are used as a value (on the product grid),
- The completeness displayed (its percentage in the «complete» grid column),
- The product or attribute values on the product grid.

akeneo

Hence the page will be updated when the working locale is changed.



Notes

1- The locales displayed are those added to at least one channel. If you do not see your working locale, it is more likely that:

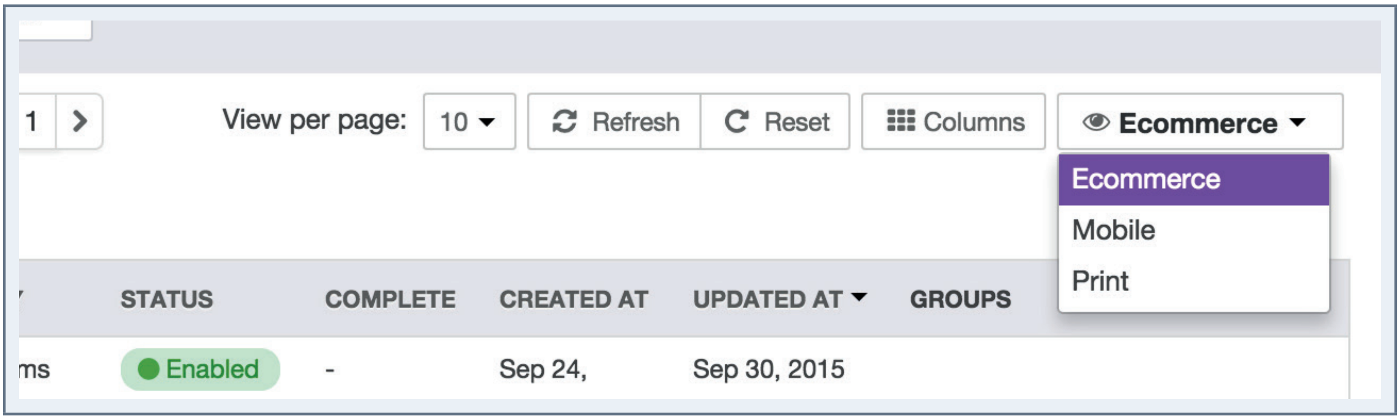
- You do not have the appropriate access rights to view or edit products for this working locale (Enterprise version). In this case, then please contact your administrator.
- The locale is not required by any channel, therefore it is not activated. To add a locale to a channel, please refer to “Manage channels” in the PIM Catalog Settings Guide.

2- The working locale selected on the product grid’s page is applied when editing or viewing a product form.

3- The working locale is very different from the interface locale of the user, refer to the section “Change your interface locale”.

Setting the channel context

Above the product grid, on the right side, you have a drop down menu to select your channel.



The selection of a working channel impacts the values displayed on the product grid, especially if your values differ depending on the channel.

This also impacts the completeness (percentage in the column), since there can be one percentage of completeness per channel / locale combination.

Therefore the product grid is updated whenever the working channel changes.

Notes

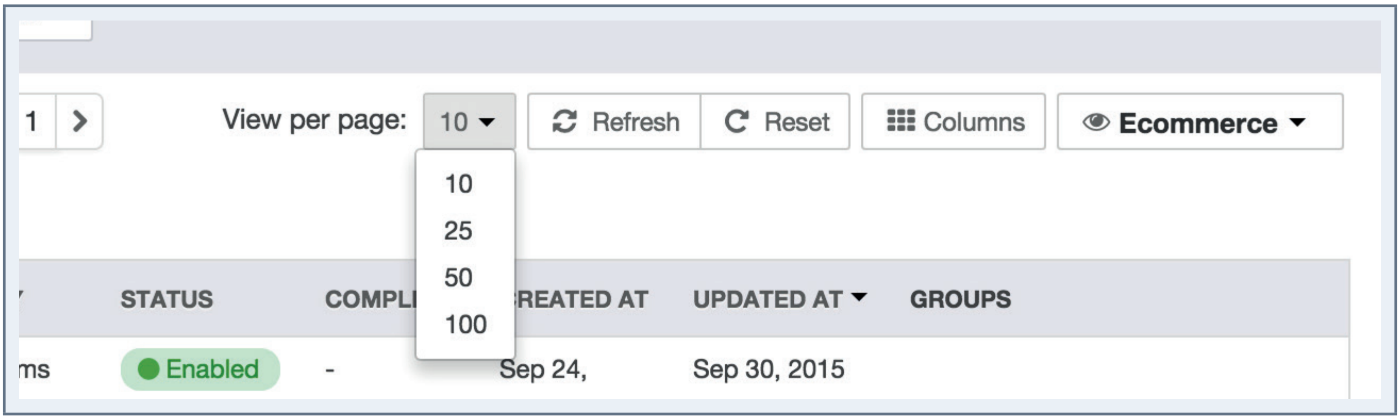
1- The available channels are those concerned with the locale selected higher up on the page. If you don't find your channel, it means the locale selected is not required for the channel you want, so it is not proposed. To add a locale to a channel, refer to "Manage channels" in the PIM Catalog Settings Guide.

2- Like the locale, the channel selected on the product grid's page is applied when editing a product form.

Page numbering

The product grid displays a page number: all the products in the grid come per a set of N products. The number of products is shown on the top right of the grid.

The number of products per page can be changed via the drop down list, you can then decide to view more products per page.

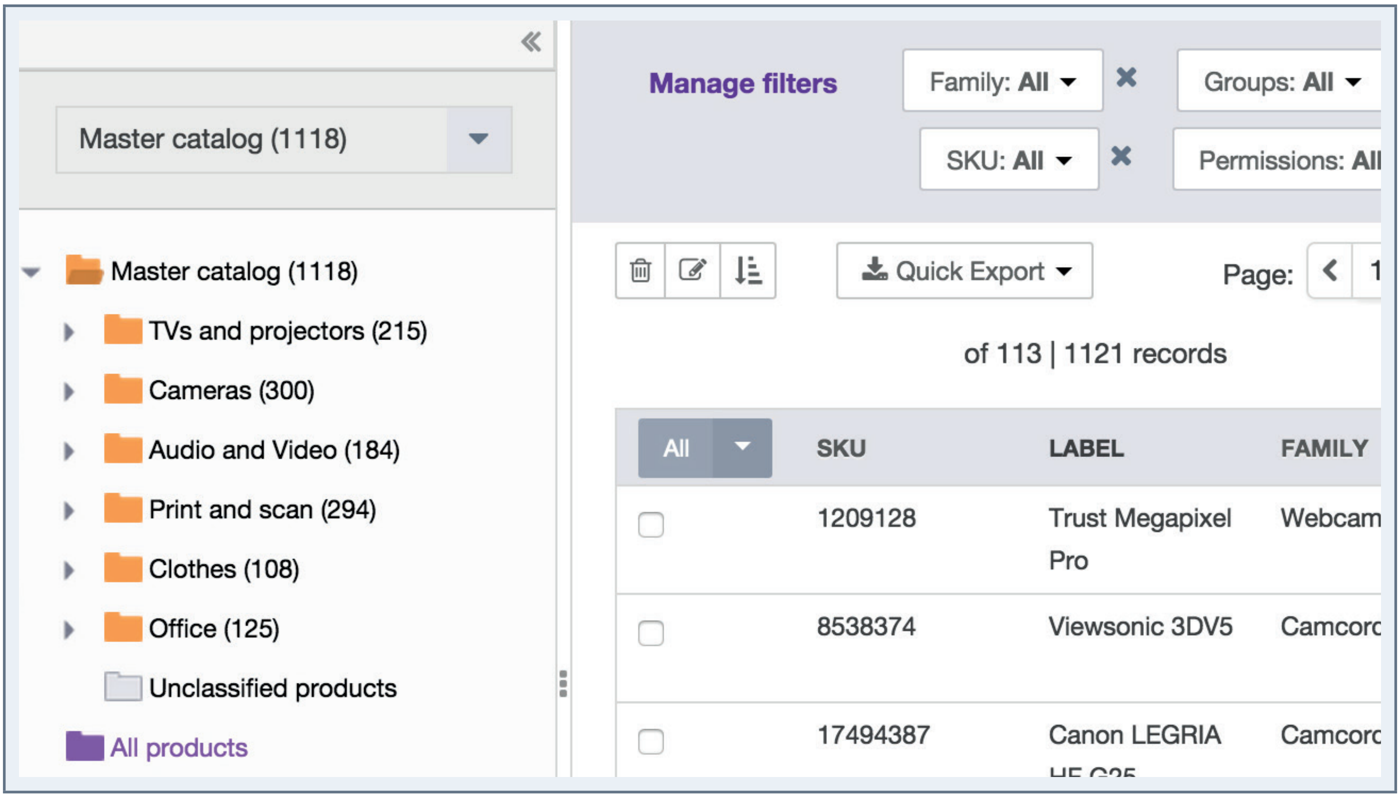


There are two navigation buttons allowing to go to the next / previous page in the product grid. The current page number you are on is displayed in the middle.

It is possible to go directly to a specific page by modifying the field indicating the current page number.

Browsing the product catalog by category

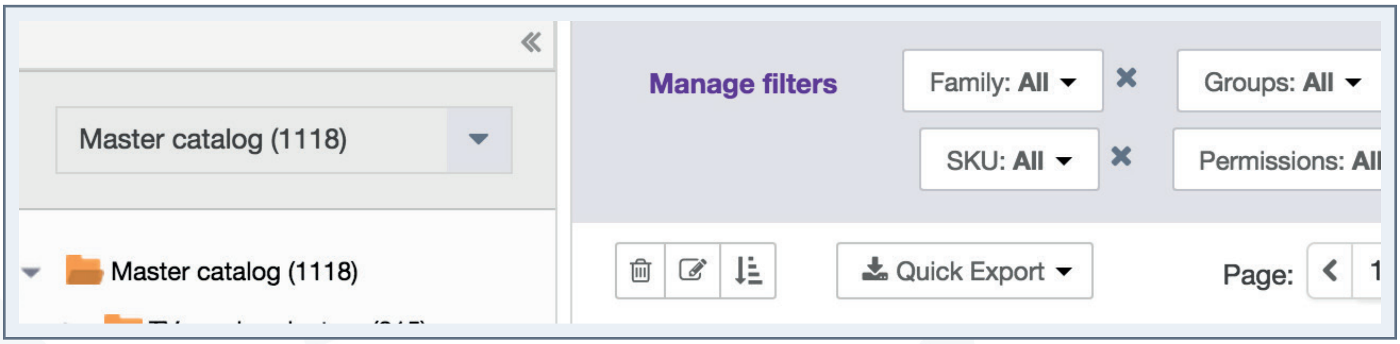
In the left panel of the product grid stands the catalog tree, displaying all your categories. This panel allows you to browse the product catalog.



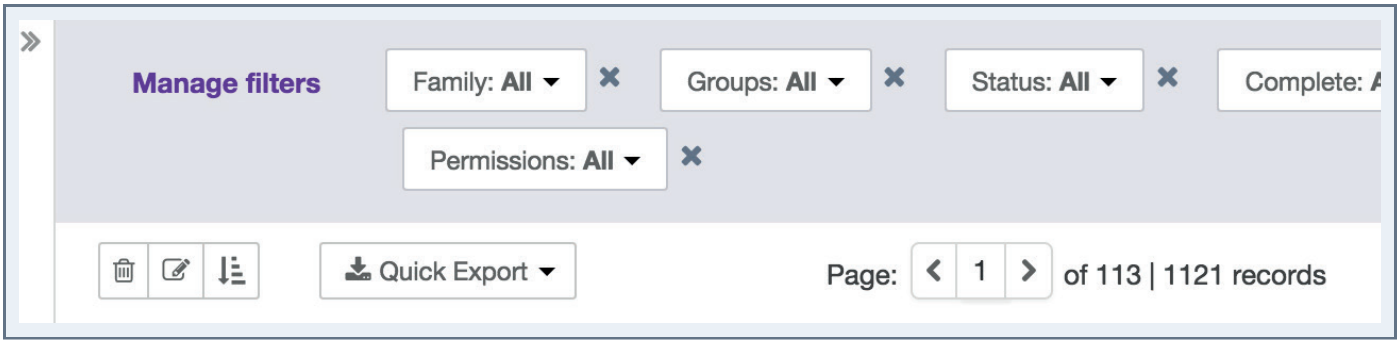
Reducing the navigation panel per category

When there is a lot of information on the grid, it can be convenient to expand the text over the full width of the page. For this, it is possible to reduce the navigation panel by category.

To do so, click on the icon on the top right of the panel. The panel will be reduced automatically.



To show the panel again, click on the icon on the top right of the panel. The panel will be displayed automatically.



Changing the width of the navigation panel per category

When the category name is too long for a given locale, the category name might not be fully displayed in the navigation panel. It may be convenient in this case to expand the panel width in order to read the whole name.

Changing the panel width may also be useful in the case of a very deep tree (with many subcategories) which, when unfolded, has not enough space to properly display all the subcategories.

To change the width of the panel, you can keep the left click of your mouse on the banner on the right (shown with the 3 points) to change the width of the panel. When you reach the desired width, release the mouse button.

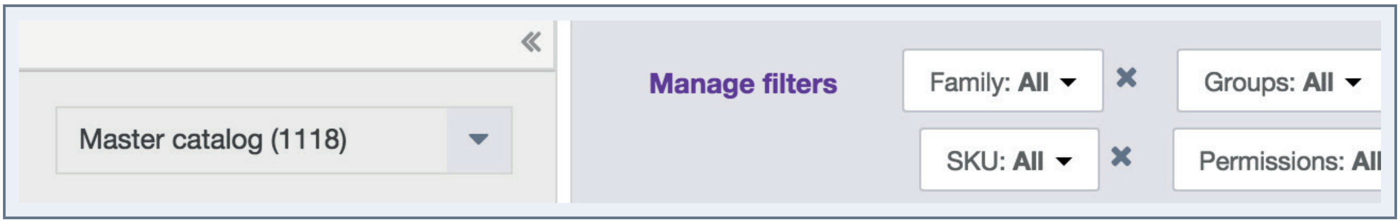
Note

There is a minimum width for the fixed panel. It cannot be reduced completely to the left.

Viewing a category tree

A category tree is a set of categories interrelated and having the same root. There may be as many trees as needed in the PIM. You can have for example, a business-driven tree, and a category tree that is the same as the one on your website. This organisation aims at making the user navigation easier.

To view a category tree, select the tree to be displayed in the drop down list at the top of the navigation panel.

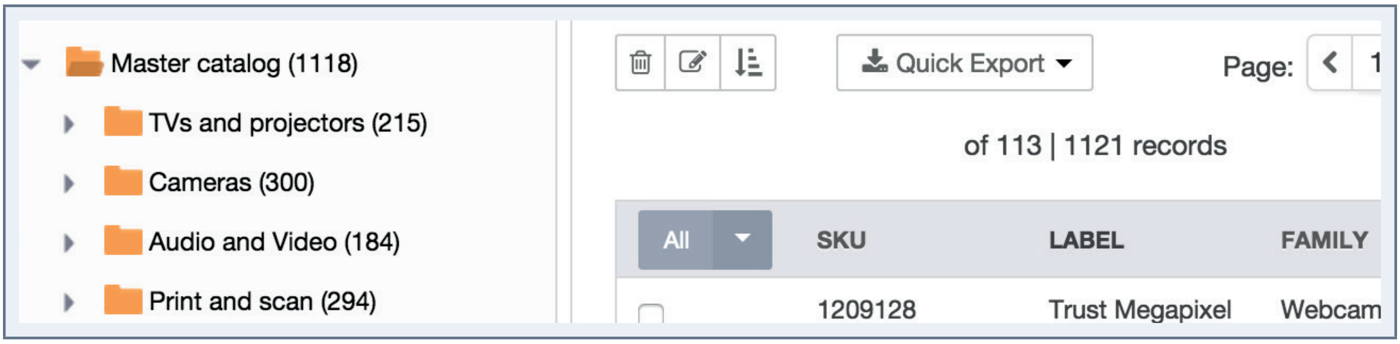


Note for the Enterprise Edition

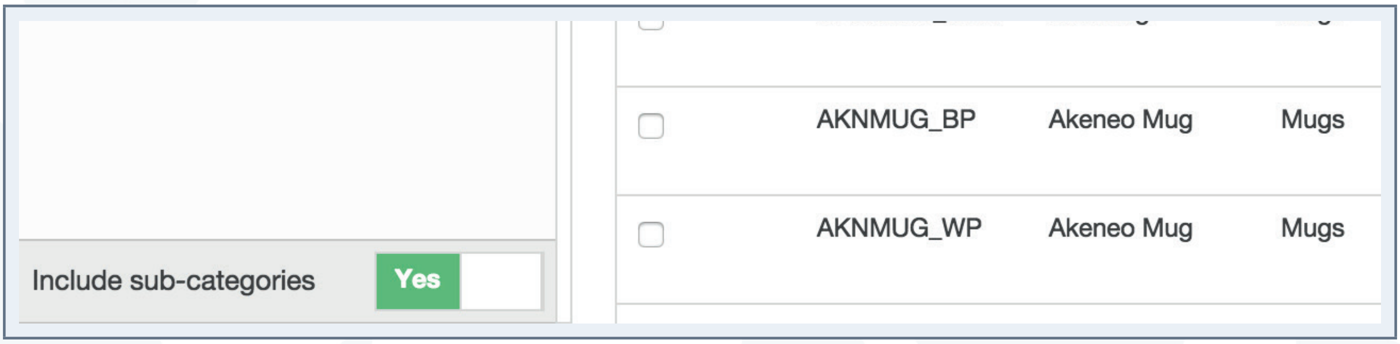
In the Enterprise Edition, if you do not have the rights to see a tree, it will not be part of the list in the drop down menu. In this case, please contact your administrator.

Include subcategories for the product counter per category

On the right-hand side of each category label, there is a number into brackets showing the number of products classified in this category.



There is an option available at the bottom of the navigation panel for categories.



This option takes into account the number of products classified in sub-categories. By default, this option is set to “Yes”, hence subcategories are included.

If you do not want to take into account the products classified in subcategories, click on ”No” at the bottom of the navigation panel. The tree will be then updated accordingly.

Note for Enterprise Edition

In the Enterprise Edition, only the products on which you have rights to view and publish are counted. The other products are not taken into account.

How to view products according to their classification

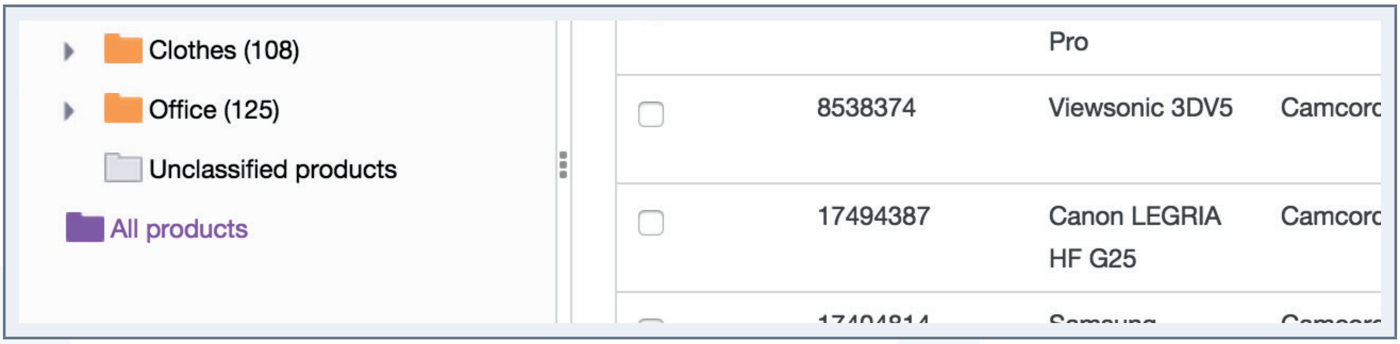
The category panel enables you to filter the product grid according to their categorization. To see the products belonging to a category, click on the desired category on the left side. The product grid will be then updated according to your selectio

Note for Enterprise Edition

Only products that you can view or edit are displayed in the grid, without applying any filters.

Viewing products which are not classified in a tree

A “category“ as a filter is displayed for the whole tree. The “folder” icon is gray and on the bottom of the tree. This category named as “unclassified products” is automatically managed by the PIM and cannot be set.



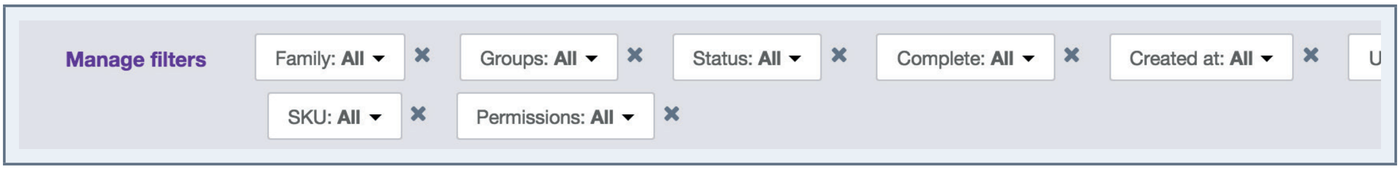
To see all products that are not classified in any category of the selected category tree, click on the “unclassified products” category at the bottom of the category tree.

Viewing all the products of the catalog

To view all products (categorised and uncategorised) of the category tree, click on the category "All products".

Using Filters

The product grid includes a filter bar. By default, the PIM displays the System Attributes (Family, Groups...):



You can use the filters displayed or add new filters: click on the "Manage filters" menu and select the new attributes you want to use as filters. The new filters will appear in the filter bar. You can now filter your products displayed in the grid.

If an attribute or an attribute option is not translated in the active locale, its code will be displayed into brackets like [name] and only the attributes having the property «usable as grid filter» enabled are available to be used as filters.

The filters can be applied on the following product information:

- Product information managed by the PIM: Family, Groups, Status, Complete, Creation date, Updated date, product identifier, Permissions, Categories.
- Product information managed via the attributes.

Notes

1 - You can define your own default product grid filters in your user account, refer to the section "Change your default preferences".

2 - If no default filters are set in your user account, the PIM will use the system attributes as default product grid filters: family, groups, status, completeness, creation date, updated date, product identifier and permissions.

3 - If you are missing an attribute in the Manage filters menu check if it is well activated as «usable as grid filter».

Note for the Enterprise Edition

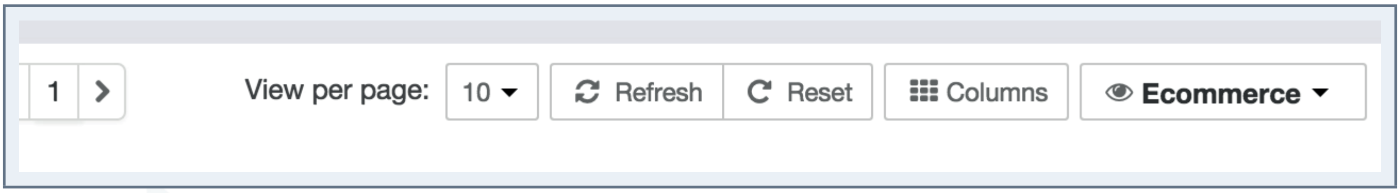
Only the attributes that you can view or edit are available in the list of filters on the product grid.

Configuring columns

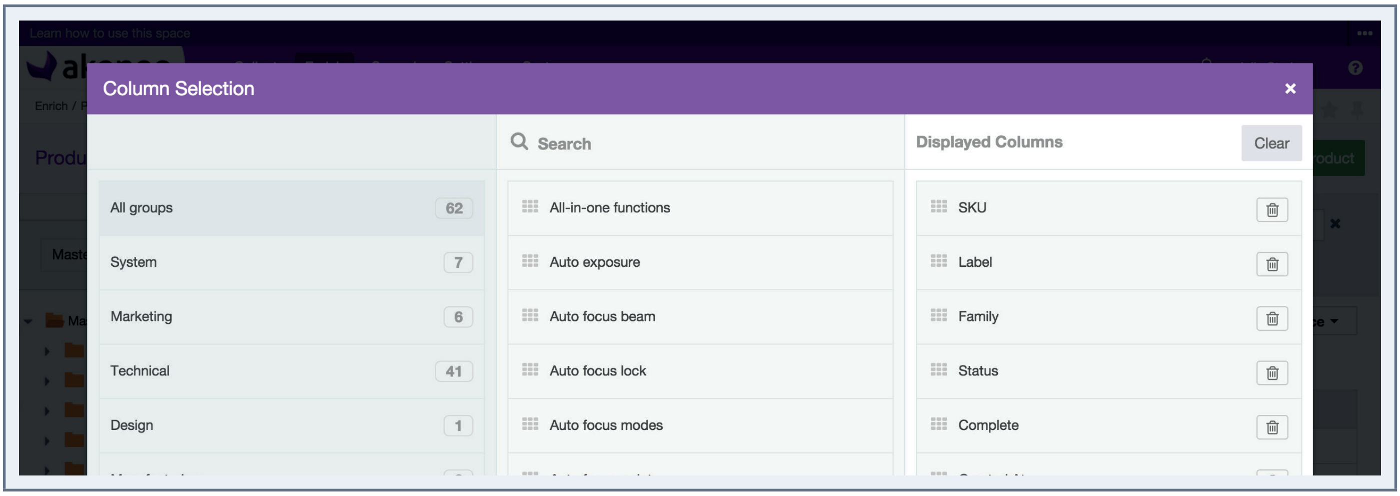
Akeneo PIM enables you to customise the columns on the product grid so it can fit your needs for results viewing. System attributes and your attributes having the property «usable as grid filter» can be used as columns.

To configure the columns of the product grid:

1. Click on the "Columns" button at the top right above the product grid.



2. The popin column configuration is prompted. On the right side, you will see the list of columns currently displayed in the product grid.

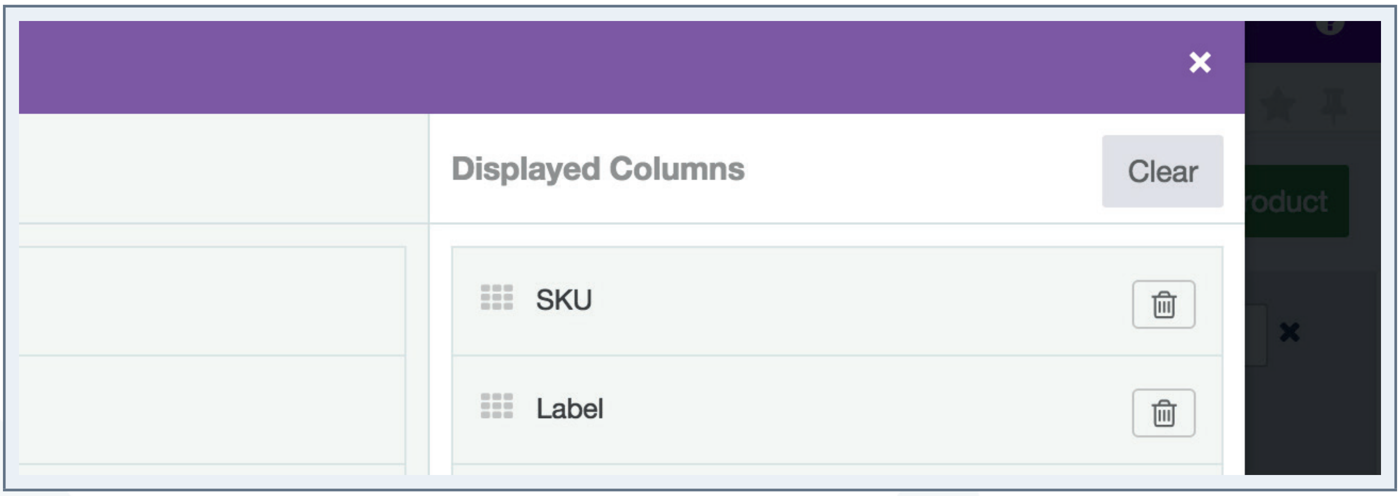


Adding Columns

To add new columns:
Select an attribute group on the left side or select «All groups» to search for attributes in all attribute groups (selecting an attribute group can be useful if you have many attributes). Then look for attributes you want to add using the Search bar (in the middle) and finally drag and drop them to the right column.

Removing columns

You can remove a column by clicking on the “trash” icon nearby the attribute name.



You can also remove all selected columns by clicking on the button “Clear”. You need to have at least one attribute as a column.

Note

If you are missing an attribute in the Column Selection menu check if it is well activated as «usable as grid filter».

Note for the Enterprise Edition

If you are missing an attribute (whereas it is activated as «usable as grid filter»), it is more likely because you do not have the access right on the attribute group. Contact your administrator to check your rights on the PIM application.

Sorting out columns

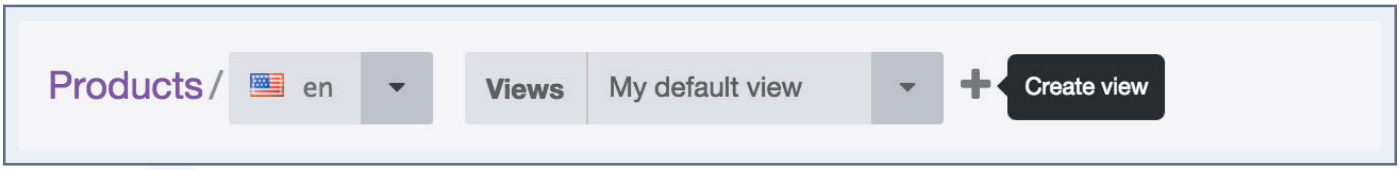
To sort out the columns, drag up and/or down the attributes in the right column. Once you have defined the attributes to be displayed and their order, click on «Apply».

Using the different views

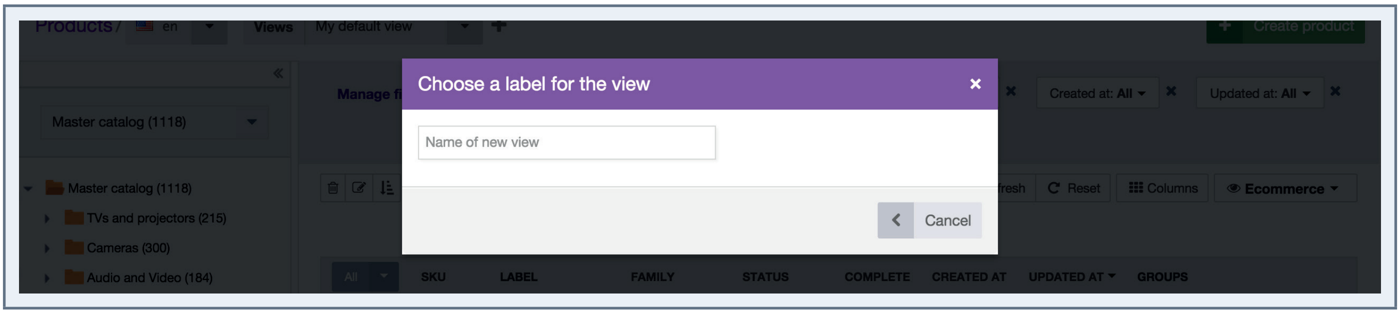
The product grid as well as the various options to search or view results available in the PIM is enhanced by the possibility to save filters and the grid configurations. This feature is called "view" in Akeneo PIM.

Creating a view

To create a new view:



1. Select your active filters and your column configuration (if both applicable).
2. Click on the "+" icon next to "My default view" tab.
3. The popin to create a view is prompted. Enter your view name.

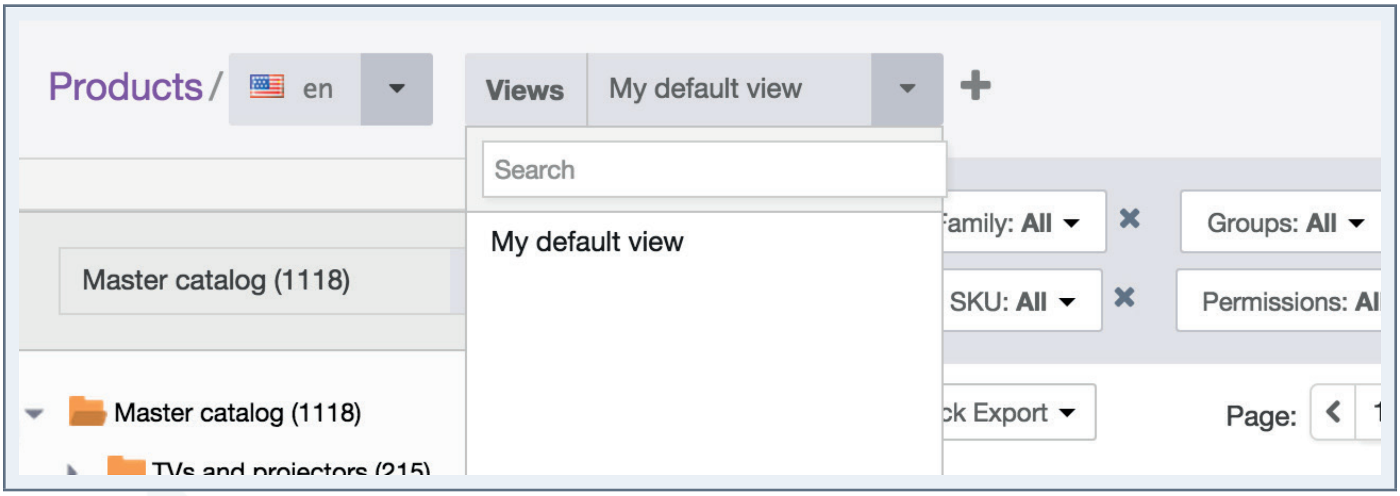


4. Once you have entered a name, click on the "OK" button. Your view is now created and visible amongst the available views.

5. Once you have entered a name, click on the "OK" button. Your view is now created and visible amongst the available views.

Applying a specific view

You can apply a specific view if you select it from the drop down list of available views.



A search engine is available above the list: you can start typing the first letters of the name the views, the list will be updated to match what you have entered.

Once you have selected a view, the product grid is updated accordingly with the results of the filters applied, and the configuration of the product grid that has been saved.

You can add, delete, or edit filters to refine your search results. You can also update the view (if it is your own view) and then make a copy of these filters and of the configuration as a new view.

Notes

1 - Only the views you can apply are available in the list of available views.

2 - You can define a default view when you open the product grid in your user account, refer to "Change your default preferences".

3 - The default view option is only available **if you have already created a view in the Product Grid**. Otherwise the field will not appear.

Concerning the views that you created:

- Your view is shared and can be used by all Akeneo PIM users.
- Your view cannot be modified or deleted by another user than you.
- Only you can change or delete the views you have created.

Notes

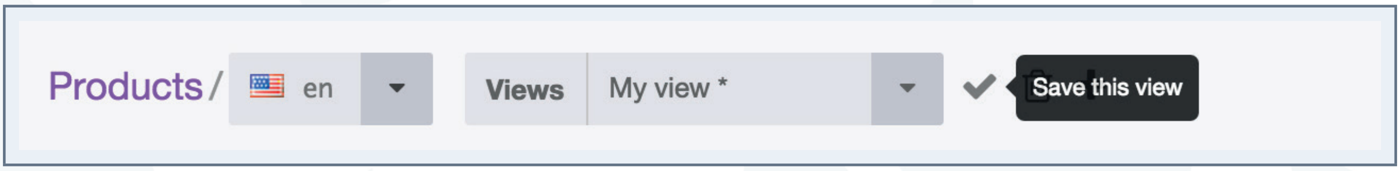
1 - When you create a new view, you can save a grid configuration as well as the active filters. Please note that the **system filters** will be always added to your filter menu, unless you customise default filters in your account - See Catalog guide

2 - Only the **active filters** will be kept, meaning that filters added but not used will not be saved. For instance, an attribute filtered on ALL will disappear when saving your view, because ALL is the default filter value.

Updating one of your views

To update the filters or the column configuration of the views you have created:

1. Select the view that you want to edit.
2. Change the filter and/or the grid columns, when you make changes an asterisk "*" is shown nearby your view name.

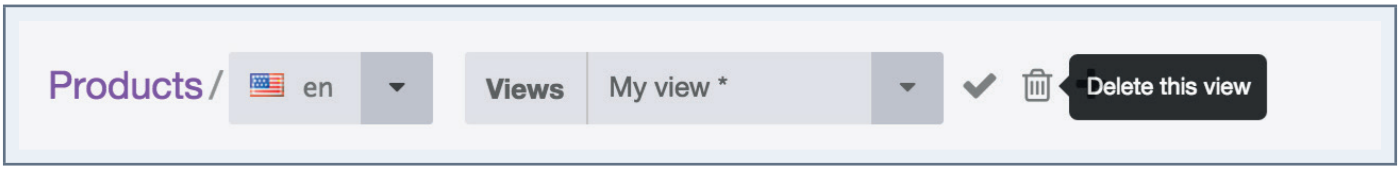


3. Click on the Check Mark icon to save your changes.

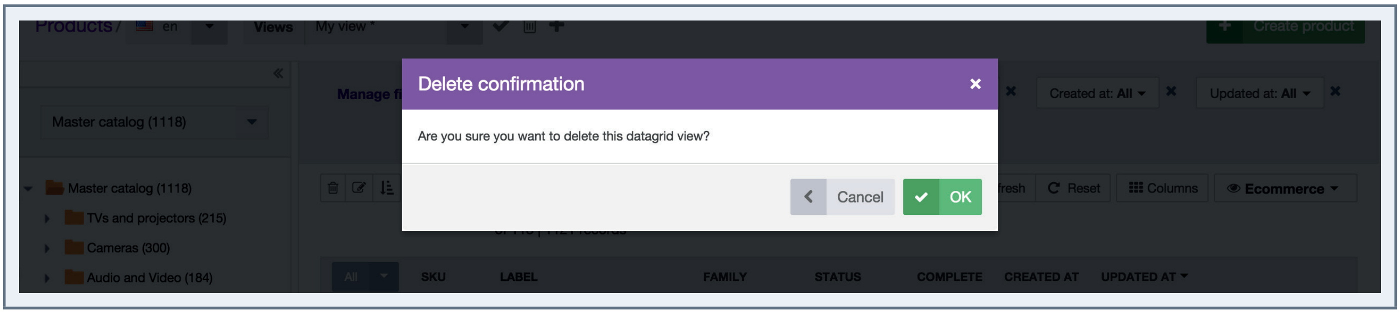
Deleting one of your views

To remove one or all the views you have created, follow the steps below:

1. Select the view you want to delete.
2. Click on the "trash" button nearby the views' list.



3. Confirm or cancel the suppression of the view.



Once confirmed, the view is permanently deleted.

Applying sort orders on the product grid

To sort the products on the product grid, click on the column's header.

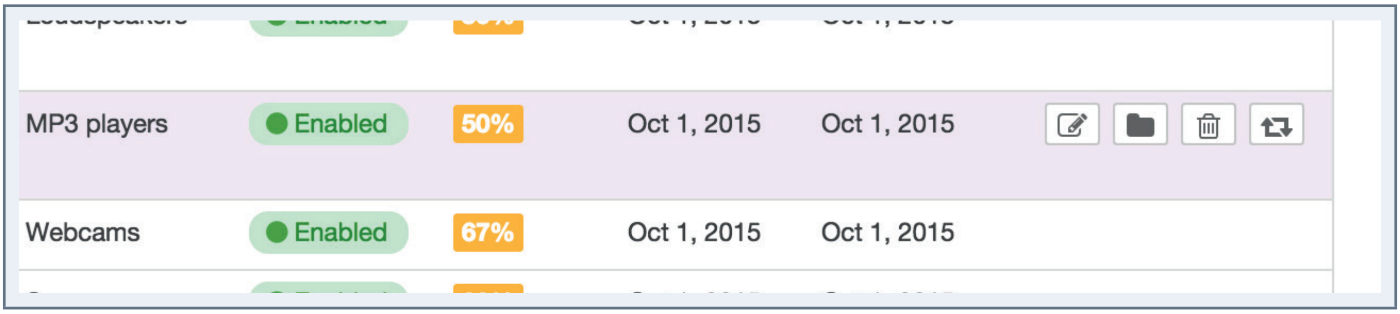
The following information cannot be sorted:

- The column "label",
- Groups,
- Prices,
- Multiselect attribute type,
- Pictures and files.

Shortcut actions on the product

Shortcut actions for each product

There is a set of actions available for each product. They are available on the right side of the product grid. The buttons are displayed when you place your mouse cursor over the product line.



Note

The shortcut actions are displayed if you have the appropriate rights, or as if you are working with the Enterprise Edition or the Community Version of the Akeneo PIM

Shortcut actions for a selection of products

If you select several products in the datagrid, you can perform actions on this selection directly from the product grid. Here the available actions:

- Delete all selected products: a popin is prompted to confirm or cancel the action.
- Mass edit products: for further details on these actions, please refer to the Section “mass edit on products”.
- Sequential edit products: for further details on this action, please refer to the “Sequential Edition on products” section.
- Move products in categories: for further details on this action, please refer to the “ Move products in categories” section.

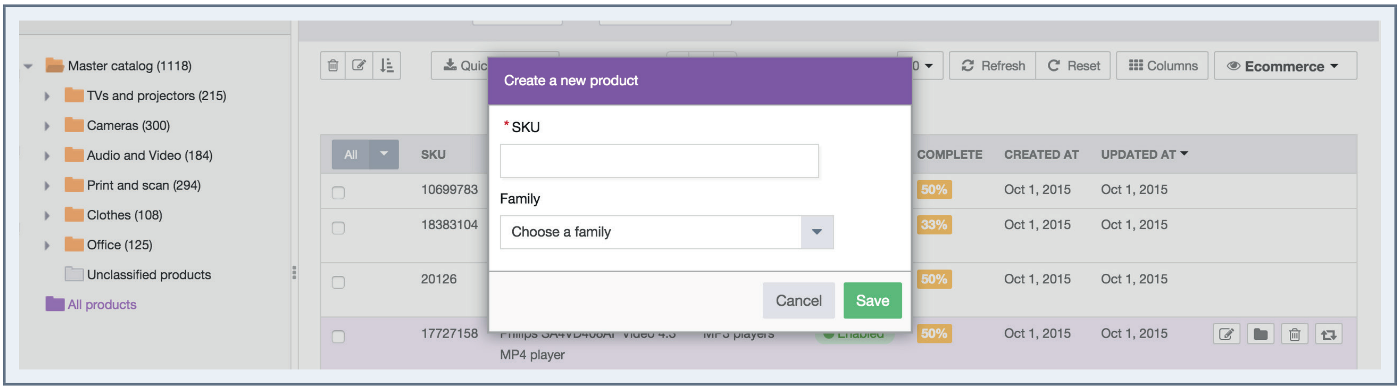
Creating a product

You can create products directly in the PIM user interface (without going through imports), please note that you must have a special permission. If this is not the case, please contact your administrator.

To create a product in the PIM

1. Click on the "Create product" button at the top right-hand side of the page Enrich > Products.

2. Select a family for the new product and specify a unique ID.
3. Click on the "save" button.



The product is created and the Product Edit Form is displayed, you can start filling in the attribute values.

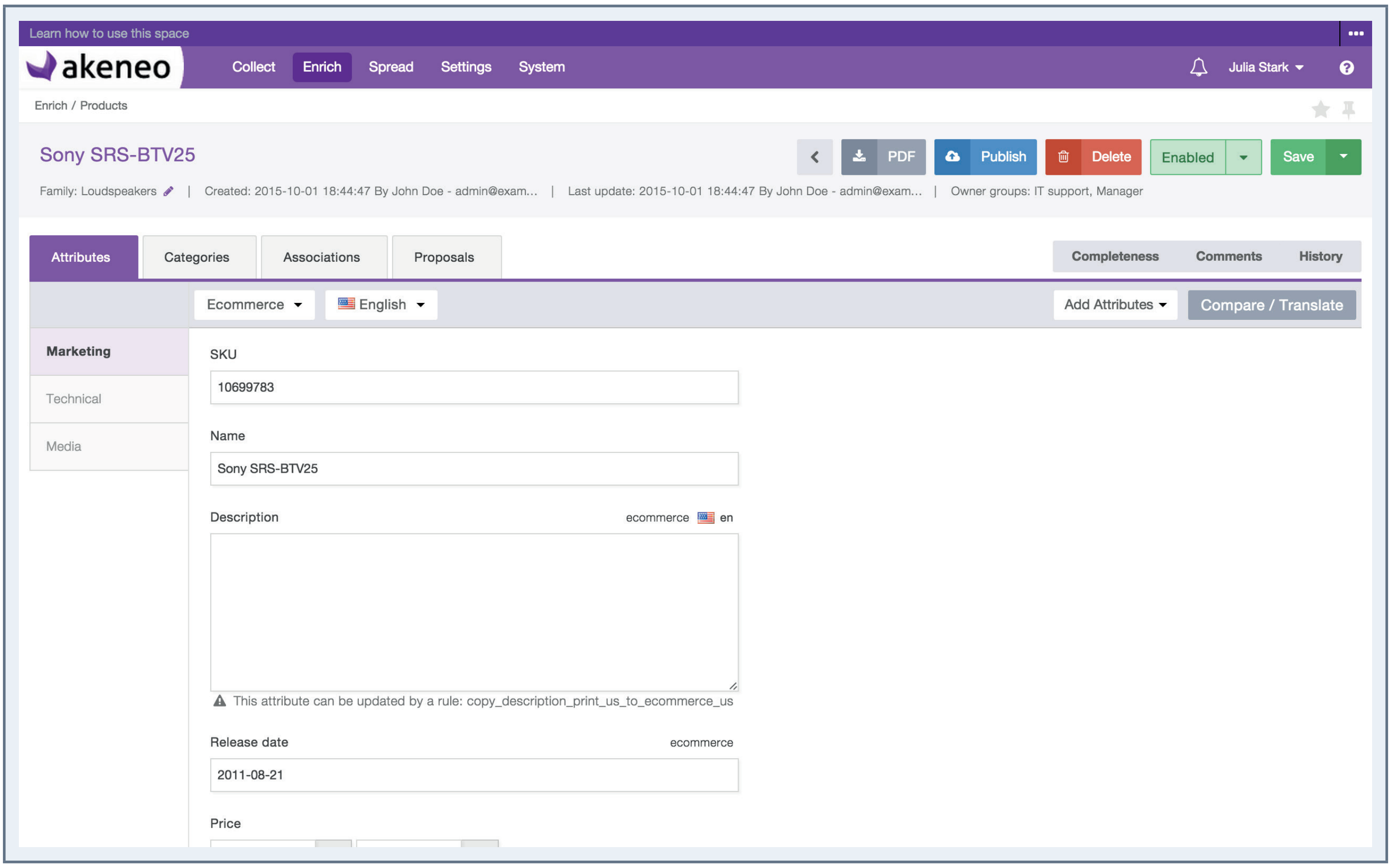
Notes

1 - To create a product you need to have at least one attribute created in the PIM: an Identifier attribute type.

2 - A product can be created without a family, but no attributes will be shown in the Product Edit Form.

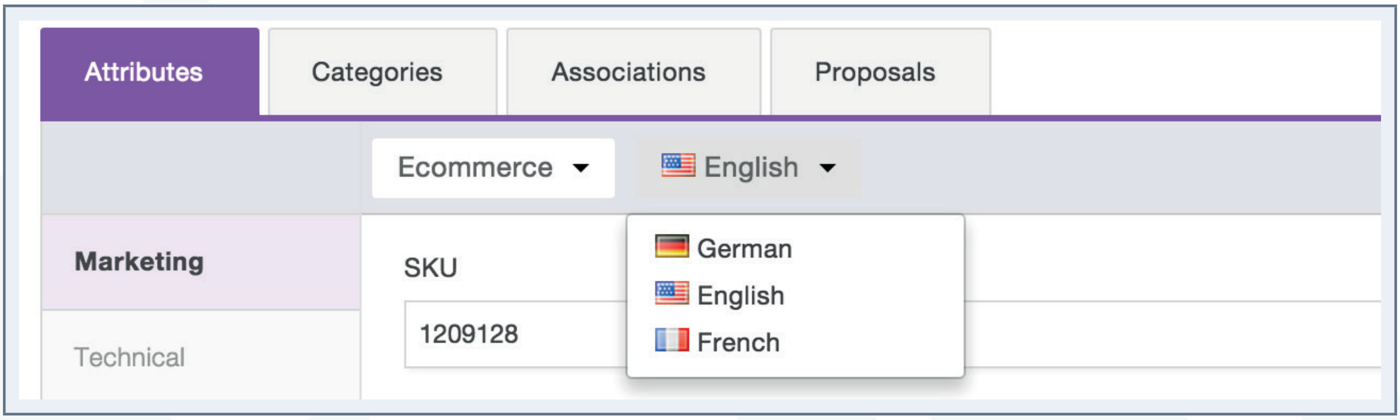
3 - The product automatically inherits from the attributes set at the family level.

WORKING ON THE PRODUCT DATA



Editing a product

1. Click on the “Attributes” tab.
2. Select the locale you want to edit.



3. Change or complete your product information.
4. Click on the “Save” button (top right hand corner).

The product is updated and a new product version is created. You can view the product versions on the “History” tab.

Note for the Enterprise Edition

1 - You can define specific rights on locales, if you have no access to a specific locale contact your administrator.

2- You can define specific rights on users that can check the product’s history.

Selecting the working locale

For each product page, it is possible to define your working locale. The selection of the locale impacts the following information on the Product Edit Form:

- The Family label in the product header,
- The Attribute groups label,
- The Attributes label,
- The Categories label,
- The Association label.

For the localizable attributes (with the indicated locale on top of the field), the entered values will be saved only for the working locale.

If you are working on several locales, you can edit one locale then another one and save all changes at once.

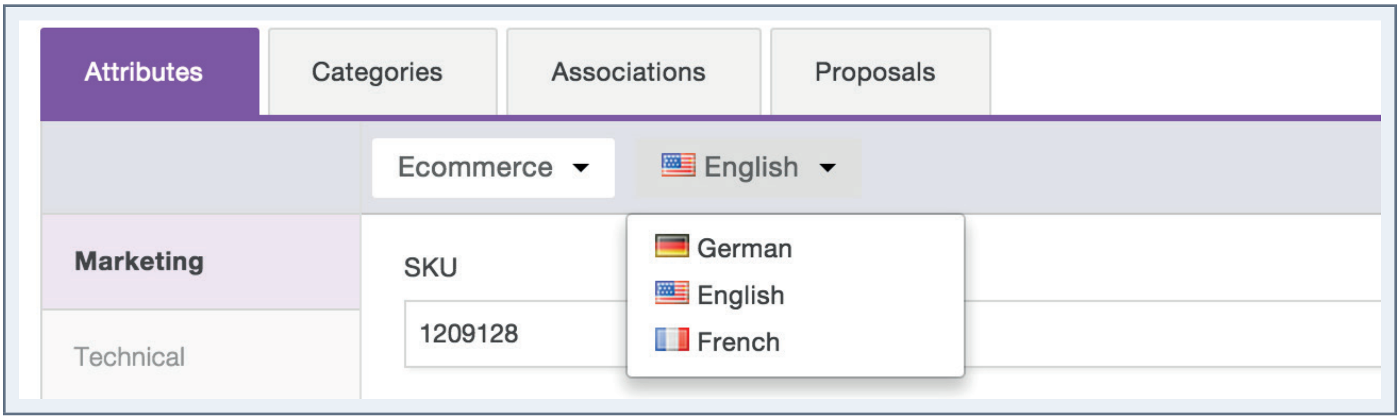
The localizable attributes for some locales exclusively (*locale specific*), are only displayed when they are concerned by the working locale.

Note

The global attributes are displayed regardless of the working locale. Hence, these attributes can be edited in all working locales.

To select your working locale:

1. Select the locale you want to work with.



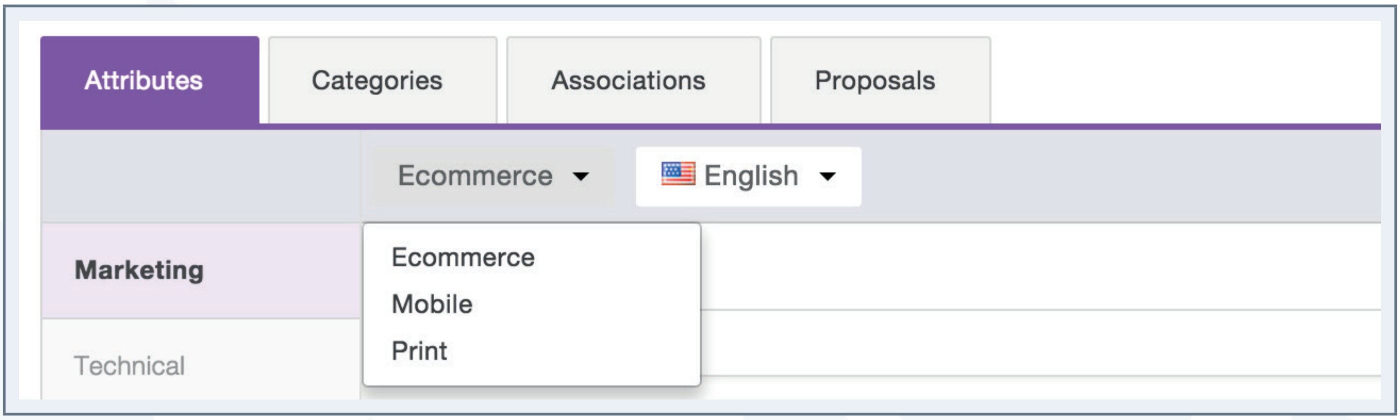
In the drop-down menu, you will find the locales (at least those that have been added to a channel). If you cannot find your working locale listed, you have two options:

- You do not have the appropriate rights to view or edit the product for this locale. Please contact your administrator in this case.
- The locale is not required by any of the channels: therefore it is not enabled. To add a locale to a channel, please refer to the section "Channel configuration" in the PIM Administrator user guide.

Selecting the working channel

To select the channel you want to edit:

1. Select your channel in the drop down list on the top of the Product Edit Form:



The suggested channels in the list will concern the relevant working channel (not locale ??) selected earlier.

Editing several channels at once

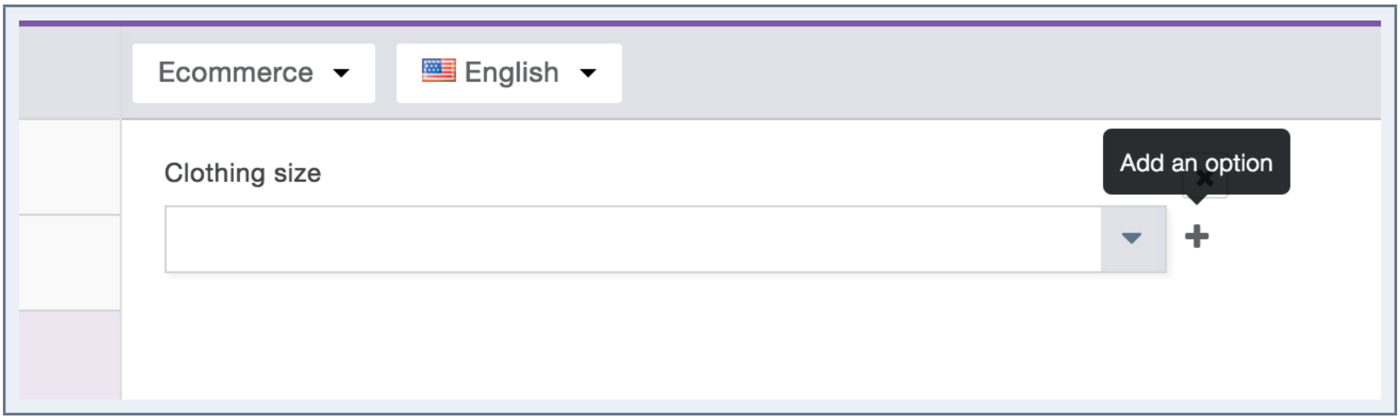
If you want to edit several channels at once, you can edit the product information for one channel then another one and save all changes at once.

Adding options to a simple or multi-select attribute

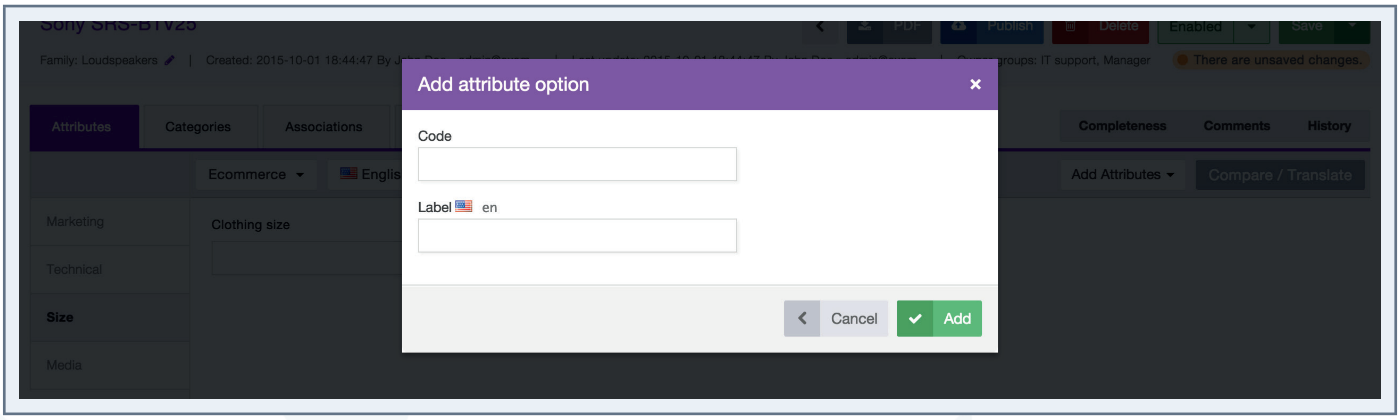
If an attribute option is missing for a select attribute type (simple or multiselect), you can directly add it within the Product Edit Form.

From the Product Edit Form

1. Click on the "+" icon on the right side of the attribute.



2. A popin appears, add the attribute option code and its label for the working locale.



3. Click on the "Add" button to create the option, it will be automatically added to the product for this attribute.

If you do not see "+" icon, you might not have the appropriate rights to add an option. In this case, please get in touch with your administrator.

Adding / removing product attributes

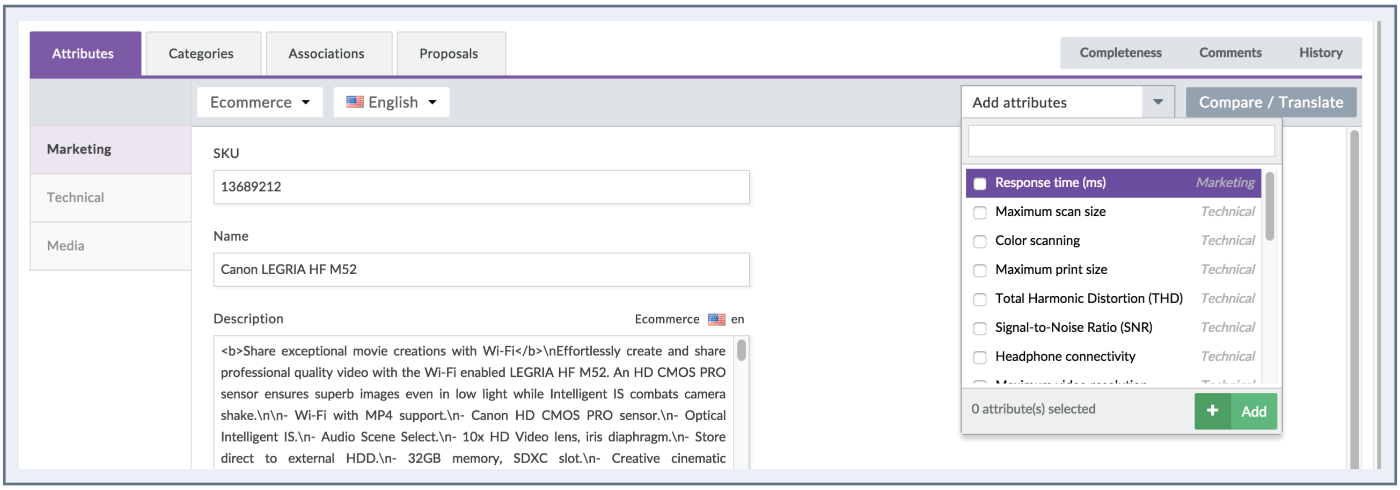
You can add attributes to a product, which are not part of the product's family.

Note

An attribute added to the product is not added to a family. It is only added to the current product. Hence, this attribute cannot be taken into account when calculating the completeness.

From the Product Edit Form

1. Click on the "Add Attributes" menu on the right side of the "Attributes" tab.



2. Look for the attributes you want to add to your product form using their labels or codes

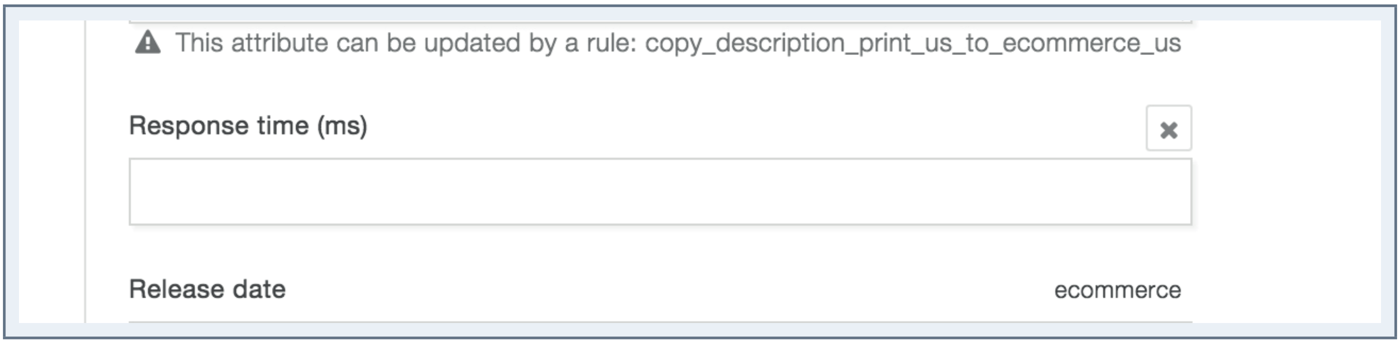
3. Check the attributes you want to add, you can add several attributes at the same time. The number of attributes selected is displayed at the bottom of the drop down.

4. Click on the "Add" button below the list.

The attributes are added to current the Product Form.

If you do not see the button "Add Attributes", you might not have the right to add attributes. Please contact your administrator in this case.

These attributes can also be removed from the product form by clicking on the cross icon nearby each attribute added.



Only attributes added manually in the Product Edit Form can be deleted, if you do not see a cross nearby an attribute, it either means that this attribute has been added at the family level, nor that you do not have the right to remove attributes manually added. In the last case, get in touch with your administrator.

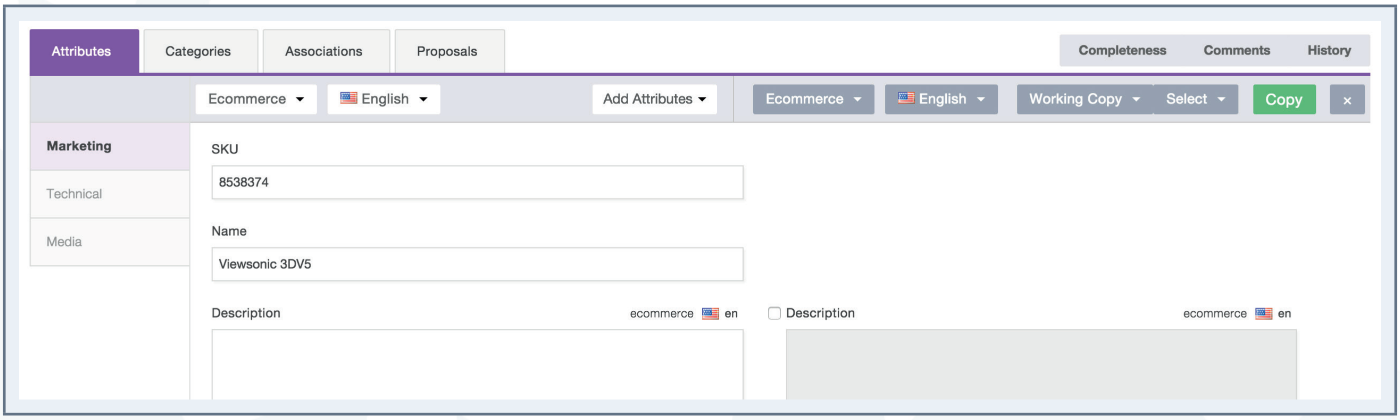
Viewing product information from another locale and/or channel

In the Product Edit Form, it is possible to view the values of the product for another locale or channel, to assist capturing the data on an ongoing work, like for instance when translating the product information, or retrieving the product information coming from another team (you are in the e-commerce team and you need the product information from the mobile team or the print team).

To view the data in another locale and/or channel:

1. Open the Product Edit Form that you need to translate.
2. Select the locale to be edited.
3. Click on the button “compare / translate” on the right side of the form («working copy» is selected by default).
4. Select the locale and channel to be displayed in the drop down menus on the right side of the form.

The localized or scopable values are displayed on the right side of the product form in the compare / translate panel.



The values on the right side can only be viewed, no edition is possible.

Additionally, it is possible to copy the values in the product form. For further details, see the next section.

Copying product information from a locale and/or a channel

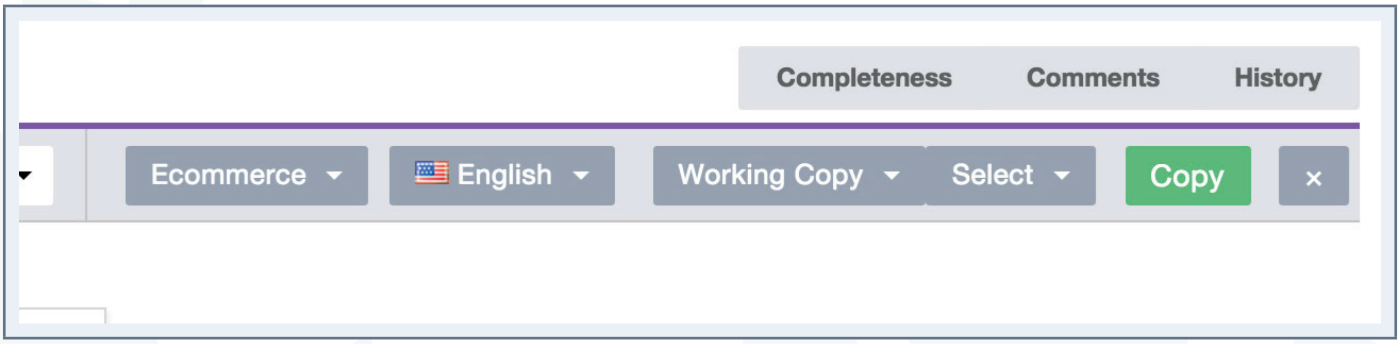
When a locale is displayed for convenient reference in the Product Edit Form (refer to the section "View product information from another locale and/or channel") you will be able to copy the values in the product form.

To copy the product information from a locale:

1. Follow the guidelines on "View product information from another locale and/or channel".
2. There are multiple option values that can be selected from the «Select» drop down menu on the top the «Attributes» tab.

The "All" option enables you to select all localized values of the locale of reference.
The "All visible" option enables you to select all the attribute group values displayed.
The "None" option enables you to deselect all the localized values of the locale of reference.

3. Click on the "Copy" button. The selected values are copied to the Product Edit Form.



Viewing the product versions

The history of changes applied to a product are taking into account for the following operations:

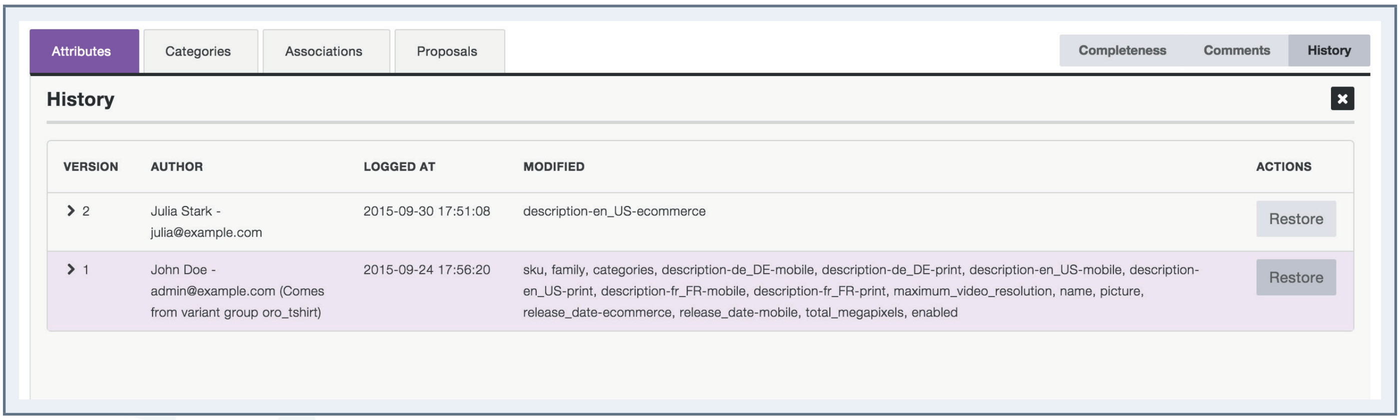
- Changes of Attribute values in the Product Edit Form,
- Changes on the product Status (enabled / disabled),
- Changes on Family,
- Changes on Association,
- Changes on Categories,
- Changes on Attribute groups.

For each change, a new product version is created. What is tracked down for each version:

- The author or system that made the changes,
- The date and time (up to seconds) at which the changes took place
- The old and the new value of each amended product information.

To view the product versions:

1. Open the product edit form.
2. Click on the “History” tab to see the whole list of versions.



Note for Enterprise Edition

The Enterprise Edition comes with a Restore Feature, allowing you to rollback a product version.

Checking the product completeness

In Akeneo PIM, a product is considered as complete if all its required vaues are filled in.

The completeness for a product is defined according to several aspects:

- According to a family: for instance a product from the family “TV” will not have the same information that another product from the family “Book”;
- According to a locale: a product can be considered complete in French but not in English as the translation has not been finished;
- According to a channel: a product can be complete for an iPad application but not for an E-commerce website due to different data requirements.

Therefore the completeness of a product is a percentage that represents the number of required attributes for a channel and a family, and which have values.

To check the completeness of a product:

You can check the completeness of a product directly in the product grid by adding the completeness information in the columns. You can also check the completeness in the Product Edit Form:

1. In the product grid, select a product to check and click on it to display the Product Edit Form.
2. Click on the “Completeness” tab. A table will sum up the product’s completeness according to the channels and the activated locales.

When a locale is not activated for a channel, the completeness progress bar is not displayed.

The list of missing attributes is displayed below the completeness progress bar. If you click on the label of the missing attribute, the Product Edit Form will be update accordingly to put the focus on missing attribute value so you can fill it in directly.

Commenting a product

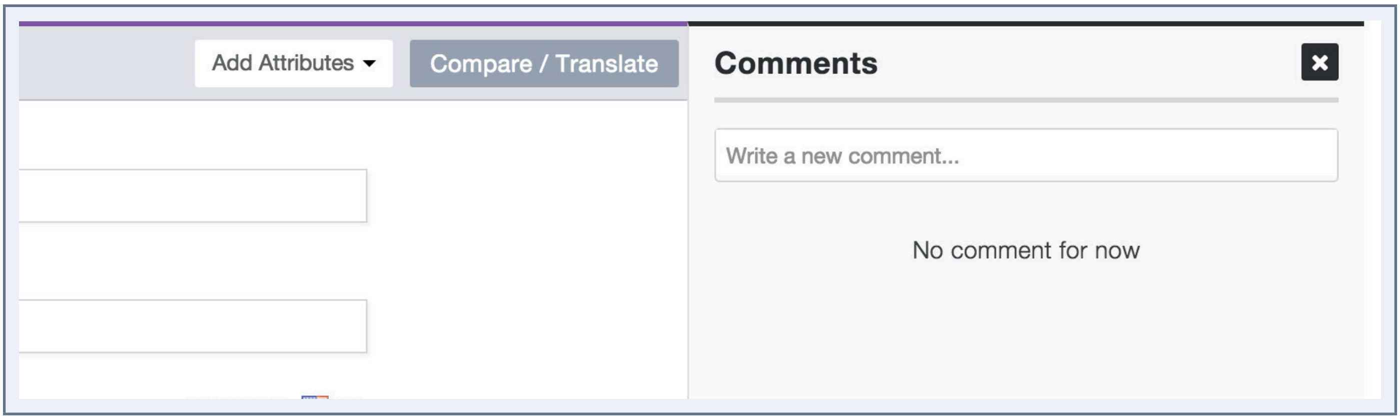
Commenting a product is a convenient way to add additional product information and facilitate the collaboration between team members.

Comments are available under the “Comments” tab in the Product Edit Form.

Adding comments

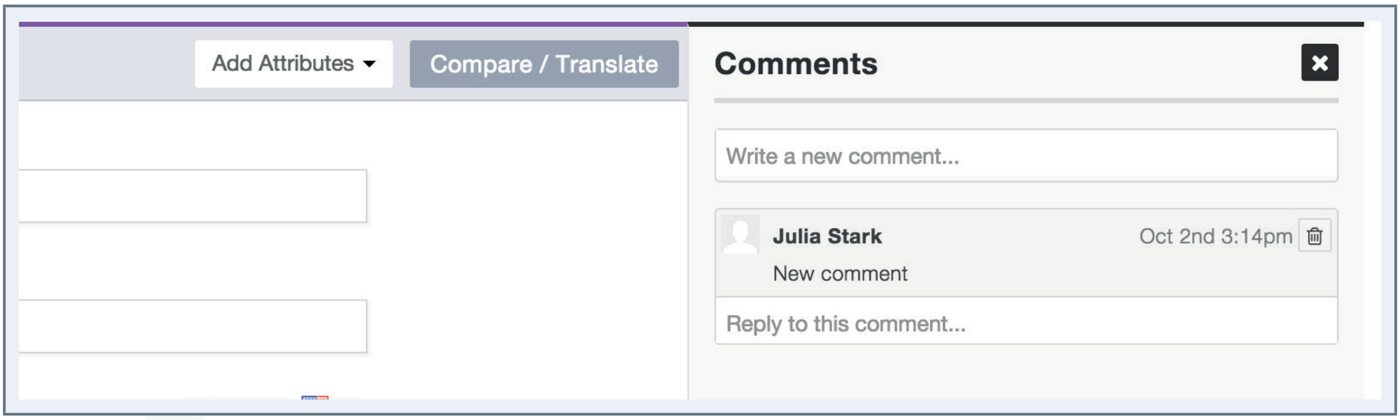
1. Open the Product Edit Form of the product you want to comment.

2. Click on the “Comments” tab.
3. In the text field, type in your comment (there is no length restrictions).
4. Click on the “add a new comment” button.



Note

For each comment left on a product, a smaller version of the author’s avatar appears nearby his/her full name.

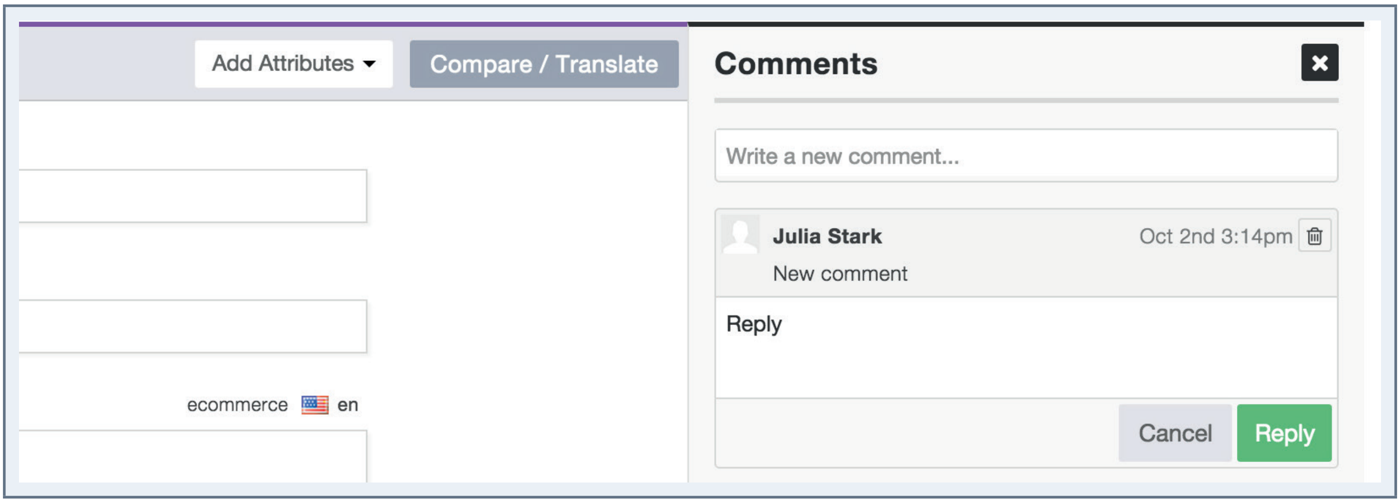


Replying to a comment

You can reply to all comments made on a product.

To reply to a comment

1. Place your mouse over the comment to reply to.
2. Click on the reply icon (back arrow) which appears nearby the comment.
3. A new text field will appear. Click on the “Reply” button to have your new comment sent.

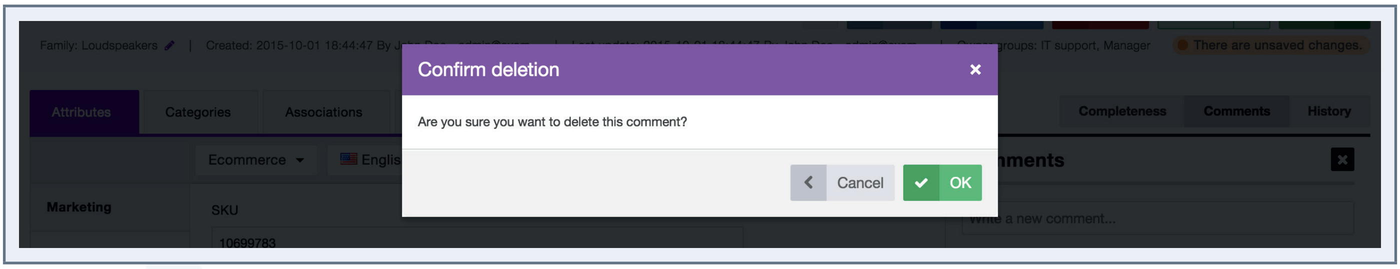


Deleting your comments

You can only delete your own comments.

To delete a comment:

1. Place your mouse over the comment to delete.
2. Click on the "trash" icon which is prompted.
3. Confirm you want to delete the comment by clicking on the "OK" button in the popin.



Classifying a product in categories

A product can be classified in none, one or more categories. A product can be classified in one category tree or more.

Checking the categories a product is classified in

You have 2 ways to proceed

- Through the Product Edit Form:

1. Click on the “Categories” tab

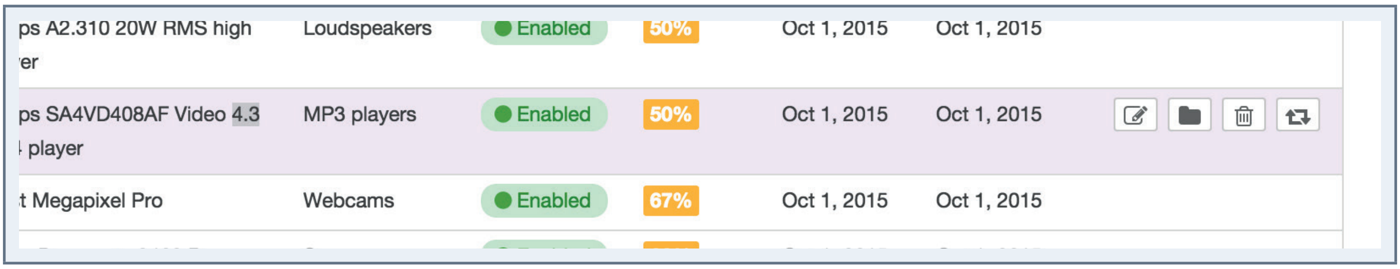
2. A green check mark nearby the Category tree indicates if the product is classified in this tree. Next to the category tree name, a number tells you in how many categories the product is added.

3. Click on the name of a category tree to see the categories in which the products are classified.

- Through the shortcut in the grid:

1. Select the product for which you want to see the classification in the grid.

2. Hover your mouse over the product line in the grid, then the category button (a folder icon) will be displayed

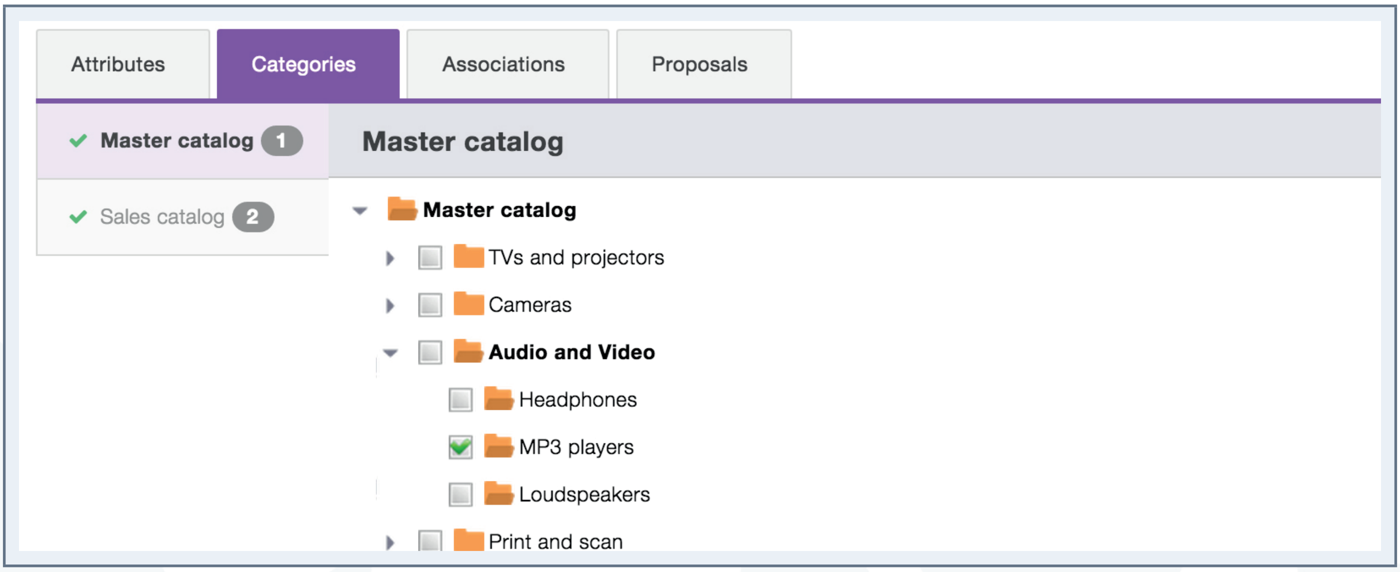


3. Click on the “Classify the product” button. The product category tab will be displayed.

4. A green check mark nearby the Category tree indicates if the product is classified in this tree. Next to the category tree name, a number tells you in how many categories the product is added.

5. Click on the name of a category tree to see the categories in which the products are classified.

By default the first category tree is displayed and only shows the categories in which the product is classified are expanded. The categories in which the product is classified are ticked.



Classifying / declassifying a product in / from categories

To classify a product:

1. Open the Product Edit Form you want to classify.
2. Click on the “Categories” tab
3. Click on category tree name.
4. Check the categories in which your want to classify the product
5. Uncheck the categories in which the product should no longer be listed.
6. Then click on the “Save” button.

Classifying a selection of products in categories

In order to save you some time, you can now directly classify products in categories without an import / export thanks to a bulk action menu in the product grid.

Adding a selection of products to categories

1. Select the products you want to move
2. Click on the bulk action menu
3. Select «Move products in categories»
4. Select «Classify products in categories»
5. Click on next
6. Select the categories you want to add products
7. Click on next
8. An information message is displayed with the number of products
9. Click on confirm
10. an information message is displayed «the bulk action add to categories has been launched, you will be notified when it’s done»
11. A notification is displayed in the notification centre

> **Note**
>
> The products will be positionned into the selected categories, the existing placement is kept.

Move a selection of products from categories

1. Select the products you want to move
2. Click on the bulk action menu
3. Select «Move products in categories»
4. Select move products from categories
5. Click on Next
6. Select the required categories
7. Click on Next
8. An information message is displayed with the number of products
9. Click on Confirm
10. An information message is displayed «the bulk action move products has been launched, you will be notified when it's done»
11. A notification is displayed in the notification centre

Note

The products will be positionned into the selected categories, the existing placement is lost.

Remove a selection of products from categories

If you make a error or have an event category finished, you can remove products from categories.

1. Select the products you want to remove
2. Click on the bulk action menu
3. Select «Move products in categories»
4. Select «Remove products from categories»
5. Click on Next
6. Select the categories you want to remove
7. Click on Next
8. An information message is displayed with the number of products
9. Click on Confirm

10. A message «the bulk action remove products has been launched, you will be notified when it's done»
11. A notification is displayed in the notification centre

> **Note**
>
> The products will be removed from the selected categories.

Remove products from categories using rules (Entreprise Edition)

This action can also be done by a rule, please contact your Administrator for further information.

Linking products

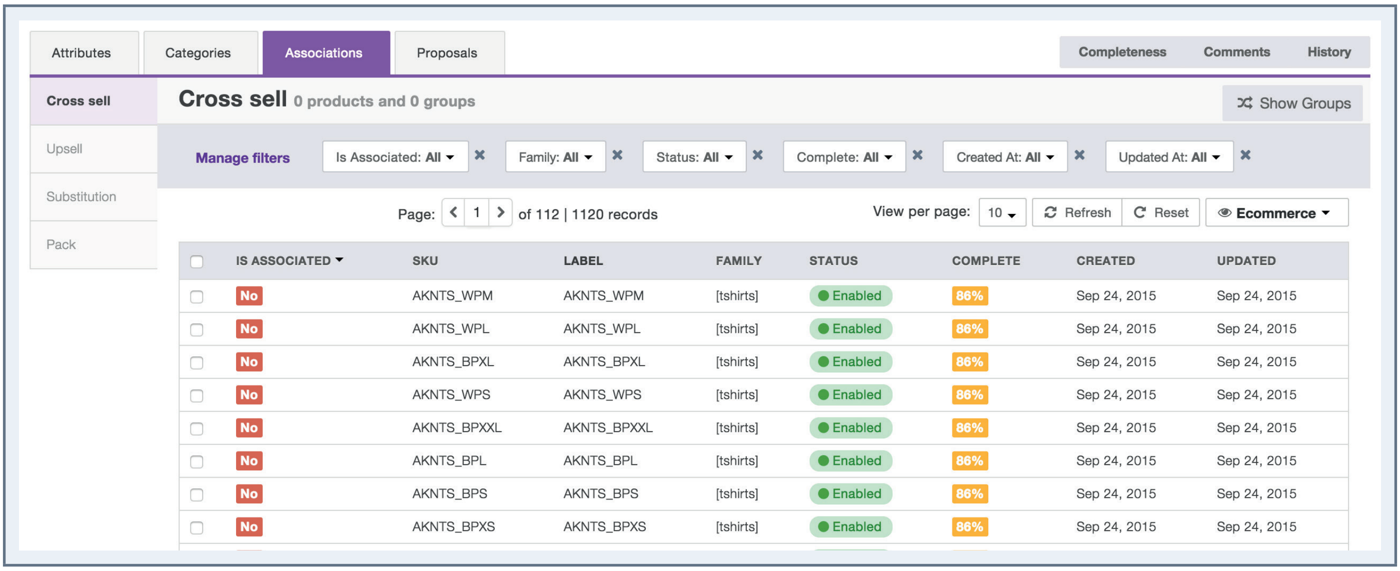
A product may be associated with none or several other products or product groups. This type of link also called a relationship has a direction: e.g. Product "A" --> Product "B" and Product "A" --> Product Group "G". The Product "B" and the product group "G" have no link or associations with the product "A".

> **Note**
>
> This type of relationship enables you to define relationships like an alternative product or a substitution between products for example.

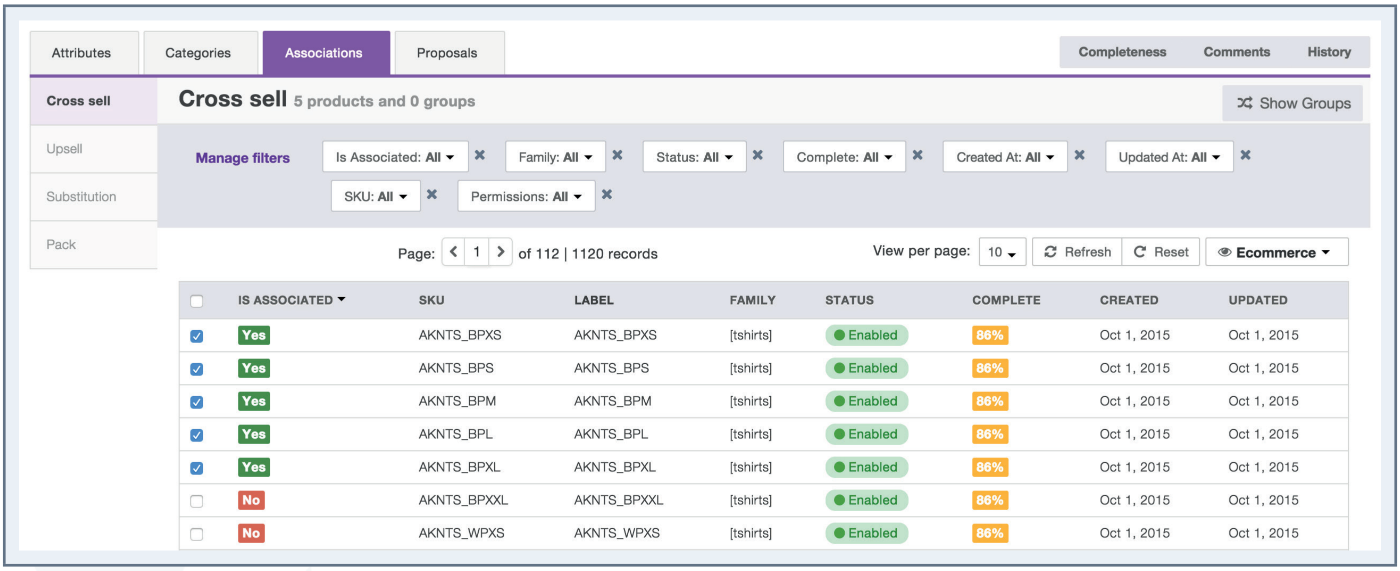
Viewing the product's links

To check the association types:

1. Open the relevant product edit form.
2. Click on the "Association" tab.
3. Click on the association name on the left-hand side.
4. Click on the "Show groups" button on the right-hand side of the tab to display the product groups grid.
5. Click on the "Show products" button on the right-hand side of the tab to display the product grid.



The green icon in front of the name of the association type shows that the product has at least one association with another product or group of products. The first type of association is displayed in the product grid, listing the products on which the type of association has been applied.



The associated products can be identified by the input “Yes” in green in the «Is associated» column of the grid. The boxes are also checked.

Adding / removing associations to / from a product

To associate a product:

1. Open the Product Edit Form.

2. Click on the "Associations" tab.

3. Click on the association name on the left-hand side.

4. Find the products or the product groups and tick them.

5. Untick the products or the product groups that you no longer want to associate with the relevant product.

6. Click on the "Save" button.

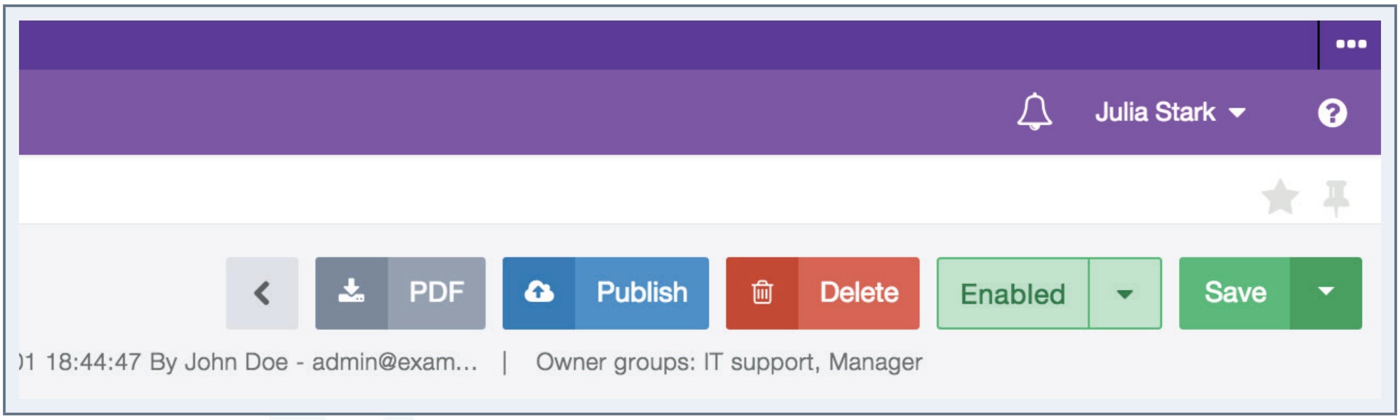
Changing the status of a product

The status of a product enables it not to be taken into account for export, regardless of its status (complete and classified). Thus a product with the status "disabled" will no longer be exported to a channel.

By default, note that a product is "enabled".

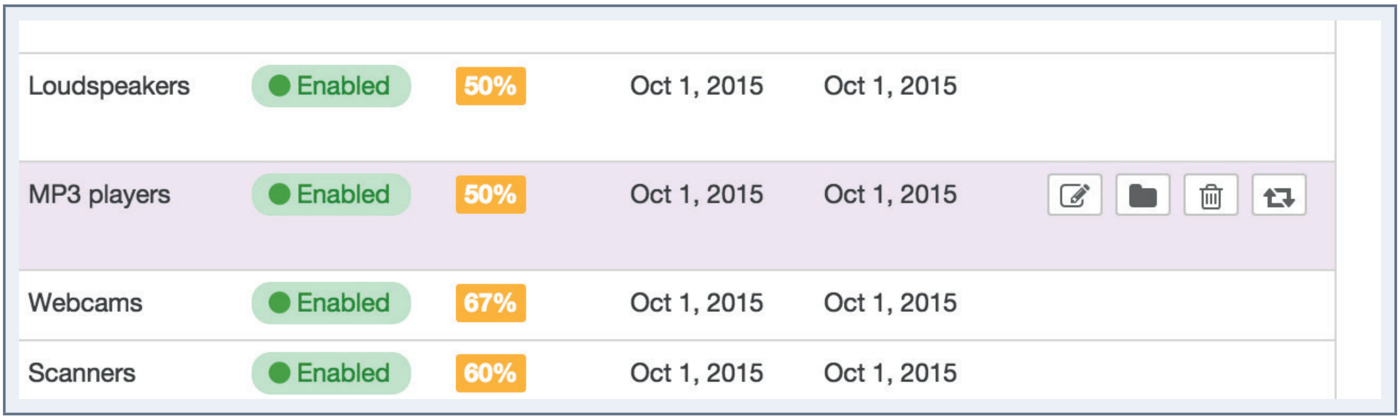
You have two ways to change a product status:

- Through the Product Edit Form:
    1. Open the Product Edit Form to change its status.
    2. Click on "Disabled" or "Enabled" in the product header.



    3. Click on the "Save" button.

- Through the shortcut on the product grid:
    1. Select your product in the Product Grid.
    2. Place your mouse over the product line in the grid, the change status (two arrows icon) button is prompted.



Loudspeakers	Enabled	50%	Oct 1, 2015	Oct 1, 2015
MP3 players	Enabled	50%	Oct 1, 2015	Oct 1, 2015
Webcams	Enabled	67%	Oct 1, 2015	Oct 1, 2015
Scanners	Enabled	60%	Oct 1, 2015	Oct 1, 2015

3. Click on the button to change its the product's status.
4. The product's status is changed.

Generating a PDF from a product form

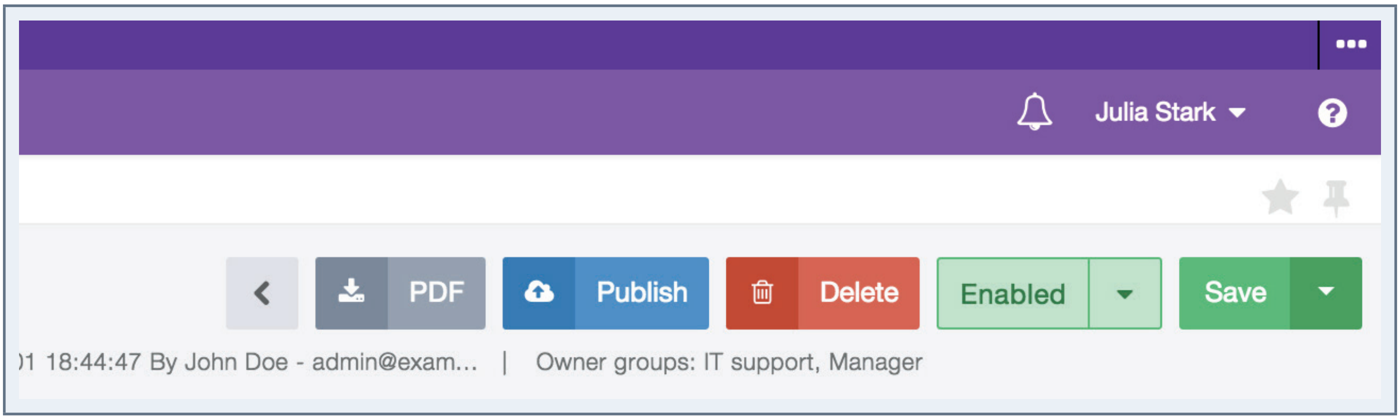
A PDF file can be generated on demand, it will includes all the product information

Note for the Enterprise version

The content of the PDF file matches the working copy of the product form.

To generate a PDF file from a product form:

1. Open the Product Edit Form.
2. Click on the "PDF" button in the product header.



3. The PDF file is automatically downloaded by your web browser.

Note

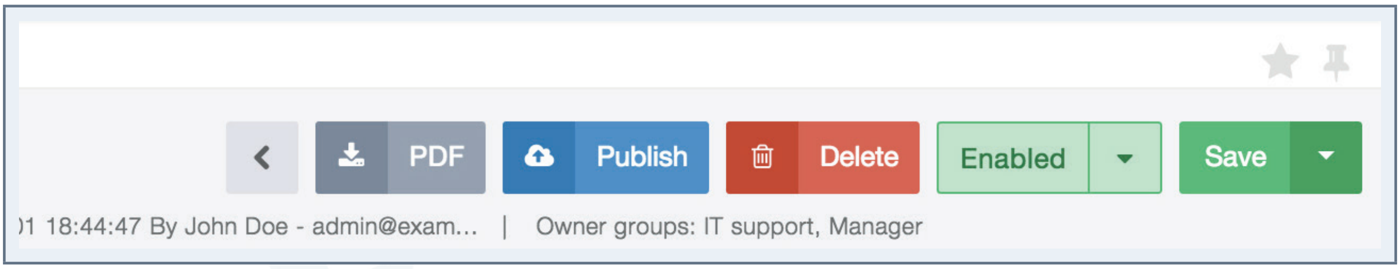
The PDF file has a default template that it can be easily customised.

Deleting a product

A product can be removed directly from the PIM. If you delete a product, all the product information will also be deleted from the PIM. This action cannot be reverted.

You have two ways to delete a product:

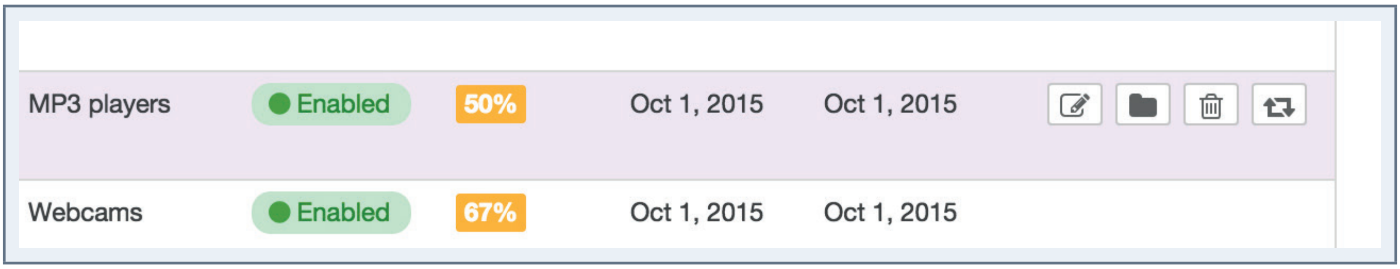
- Through the Product Edit Form:
    1. Open the Product Edit Form.



    2. Click on the "Delete" button in the product's header.
    3. Confirm the action in the popin.

- Through the shortcut on the product grid:

1. Select the product you want to delete.
2. Place the mouse over the product line in the grid, a trash icon is displayed.



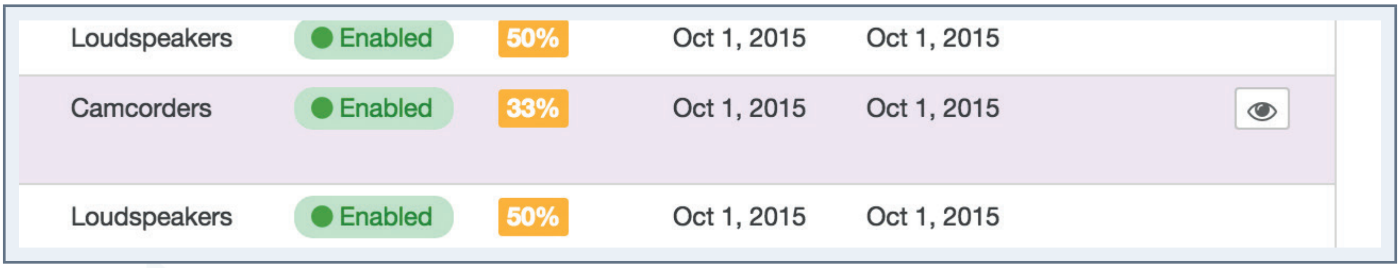
3. Click on the “Delete” button.
4. Confirm the action in the popin.

Consulting a product (Enterprise Edition only)

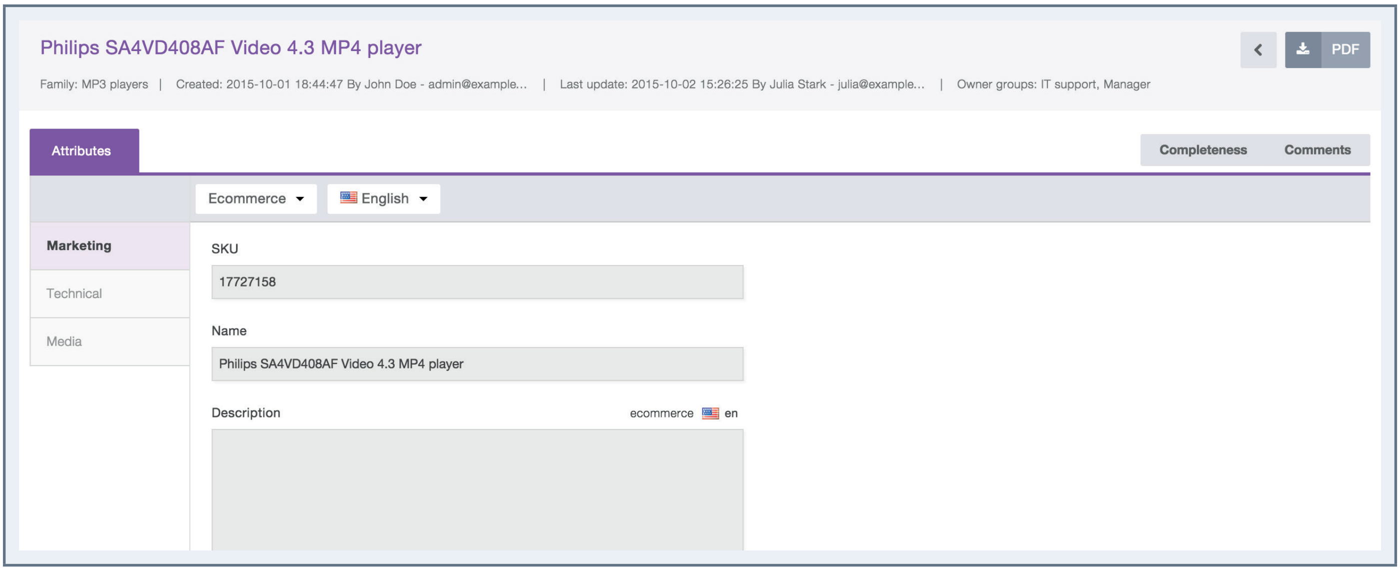
In the Enterprise Edition version, you can view a product page without having the possibility to edit it.

Viewing a product without editing

From the Enrich > Products menu, you are able to consult a product through the shortcut available in the grid, in the last column.

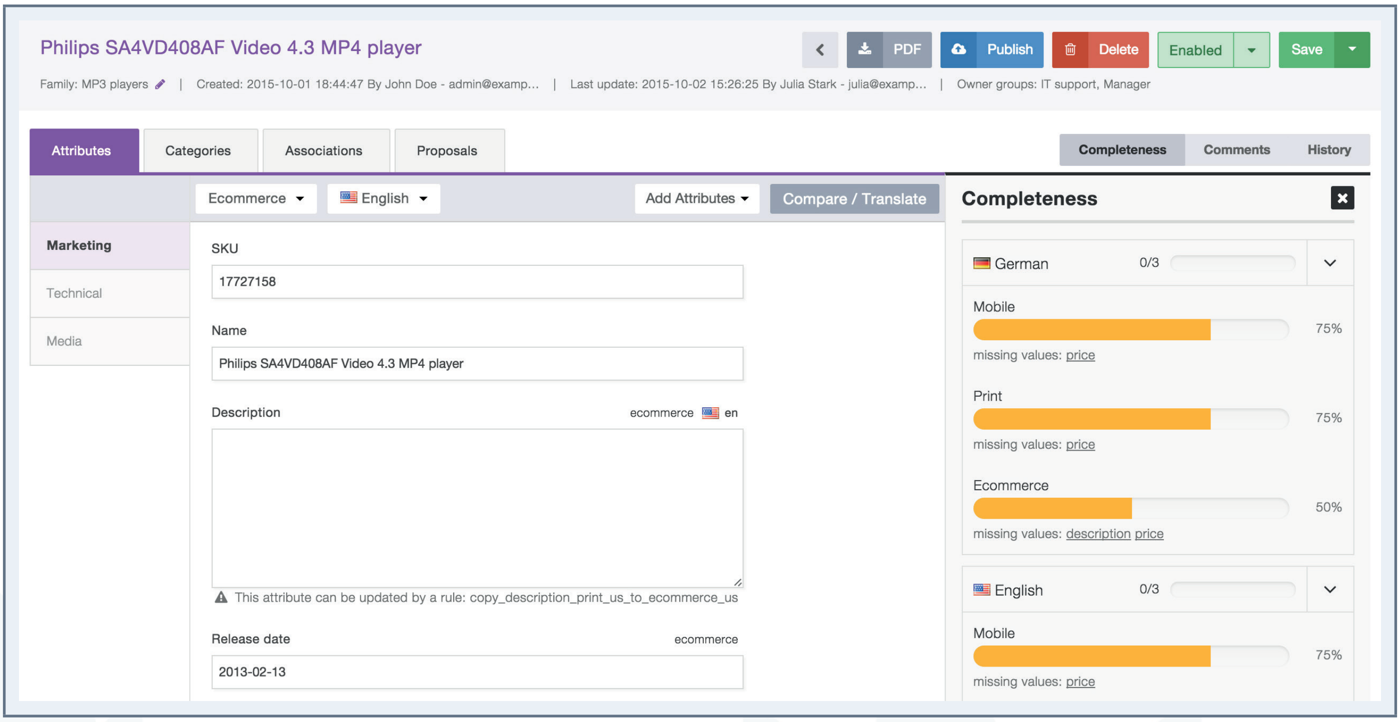


If you do not have the edit permission on a product, when you click on a product in the grid, you will have the result viewing page prompted:



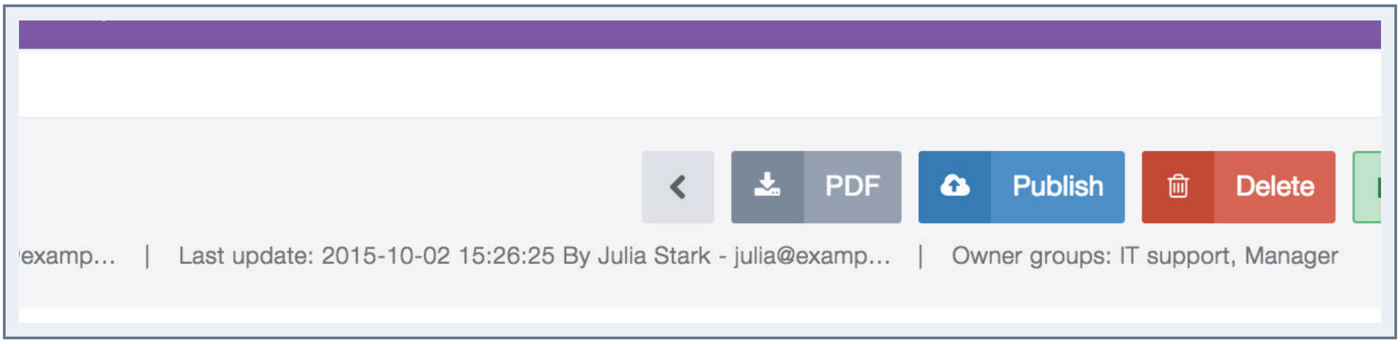
It will use the same header as you can find in the Product Edit Form: it is possible to change the locale of the viewing page. Two tabs are shown: Attributes and Completeness. 3 on the screenshot ??

The completeness of the product is shown in the "Completeness" tab in the same way as in the product edition mode.



Going back to the product grid

The left arrow icon in the header enables you to go back to the product grid.

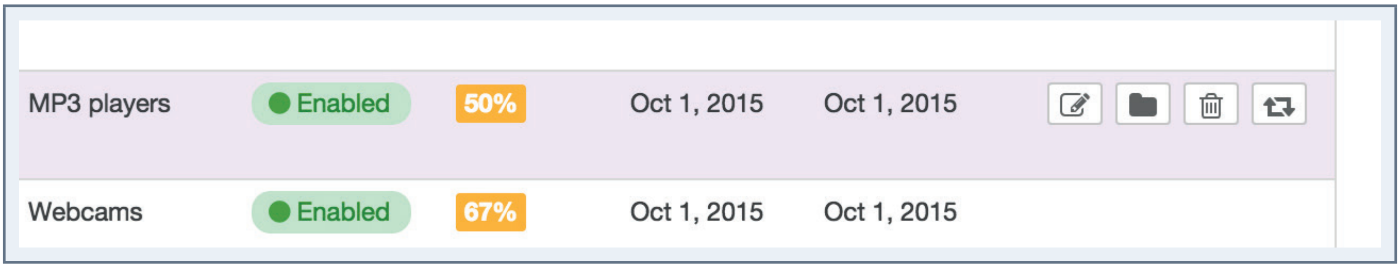


If you have the edit permission for a product, when you click on a product in the grid, the product edit form is always displayed.

Collaborating on a working copy of the product (Enterprise Edition only)

Opening the Product Edit Form

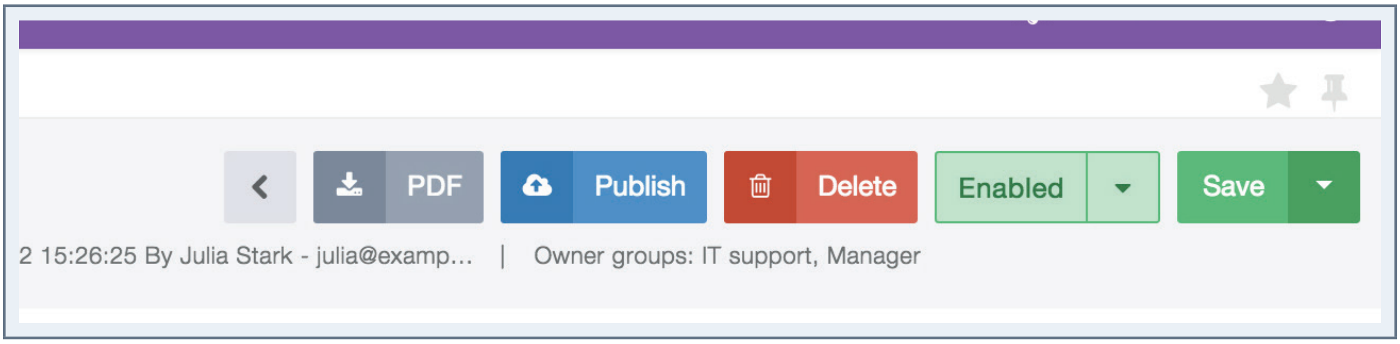
In Enrich > Products, you can access the Product Form Edit can be accessed using the shortcut icon on the grid.



The Product Edit Form is displayed. Only locales you can view or edit are visible in the list in the product header. The other locales of the catalog will not be available.

In the Enterprise Edition version, two more product information are displayed on the product's header:

- The user group(s) owner of the product
- The status of the product form, see below for more information about product form's statuses.



For further details on the user group(s) in charge of the product, you can review the section “Send my product proposal for approval”.

The statuses visible on the Product Edit Form enable you to know which information is displayed in the form. You can have the following statuses on the product form:

- **Working copy**: this is the current form approved by the Product Manager.
- **In progress**: this is the approved product form with your changes in progress. In other words, this a draft for your product form.
- **Waiting for approval**: you are waiting for your draft to be approved by the product manager.

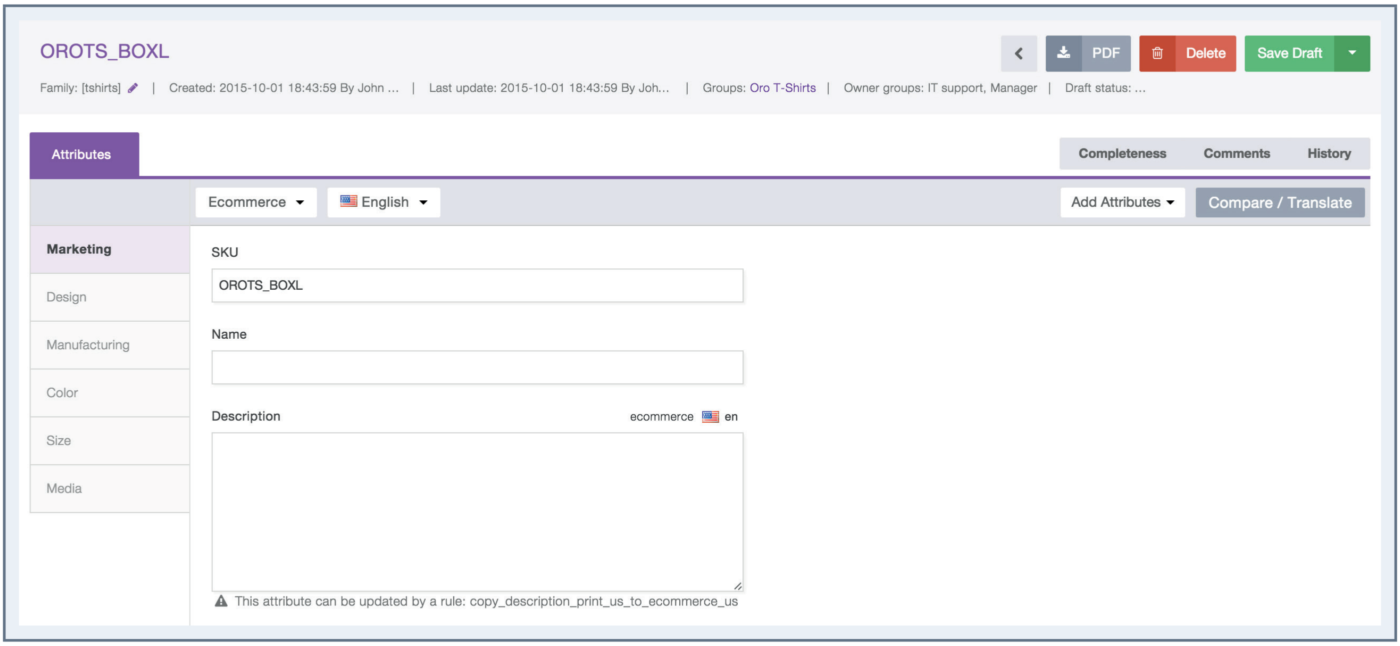
Open and edit product page will always be the same operation, whatever the status on the product form is.

Contributing to a working copy

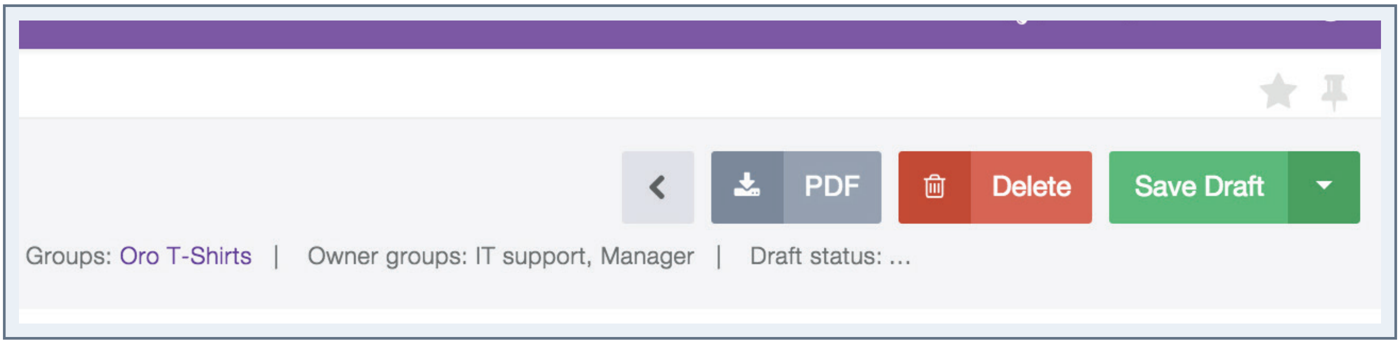
A product form will have the working copy status if you did not previously submit new values for the product information (attributes).

If you do have permissions on an attribute group, the group will not appear in the attribute groups list on the left side of the product form.

If you do not have the edit permission on an attribute group but only read access, the attributes will be displayed but you will not be able to edit them. They will appear as grayed out



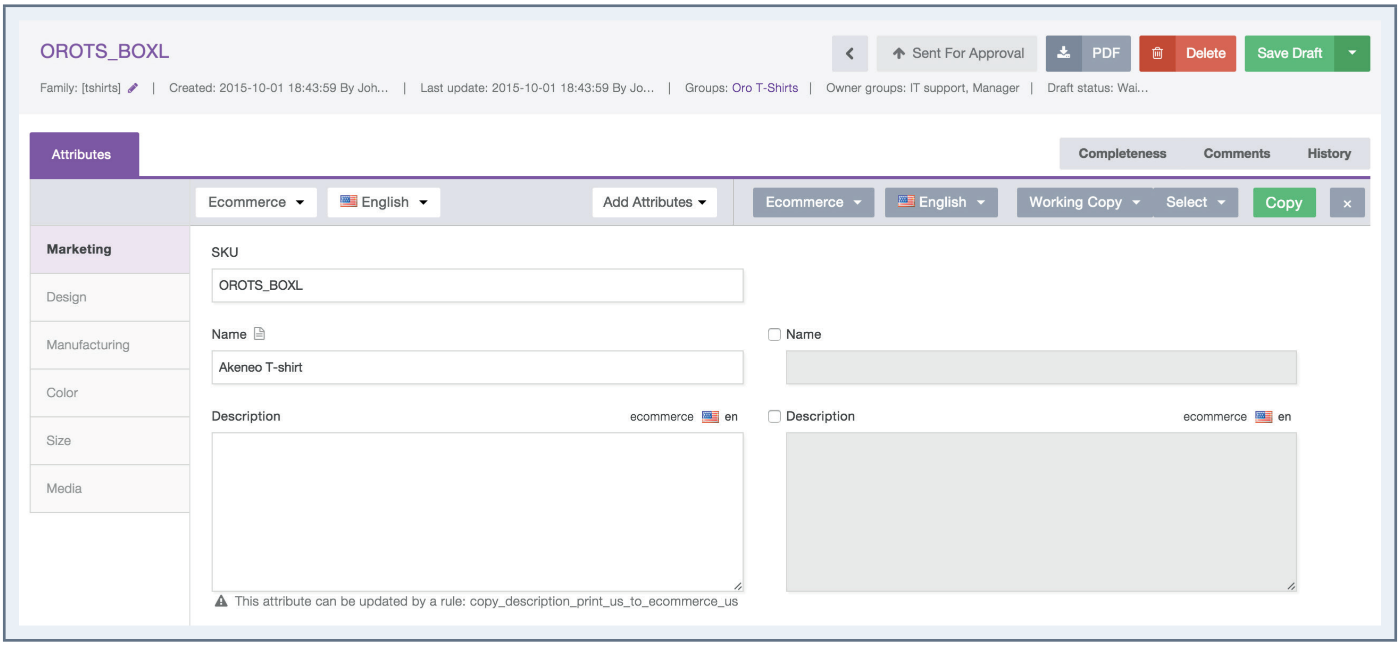
You are able to edit all the product's attributes of an attribute group on which you have the edit permission on the product values of the relevant locale.



Click on the "Save Draft" button to save your changes.

You have now created your own working copy of the product! How could you say?

- The status record has been changed to "In progress"
- All the new changes applied are displayed. For each change an icon is visible nearby the attribute. Place your mouse over the icon, you can view the ongoing approved value. (show where)

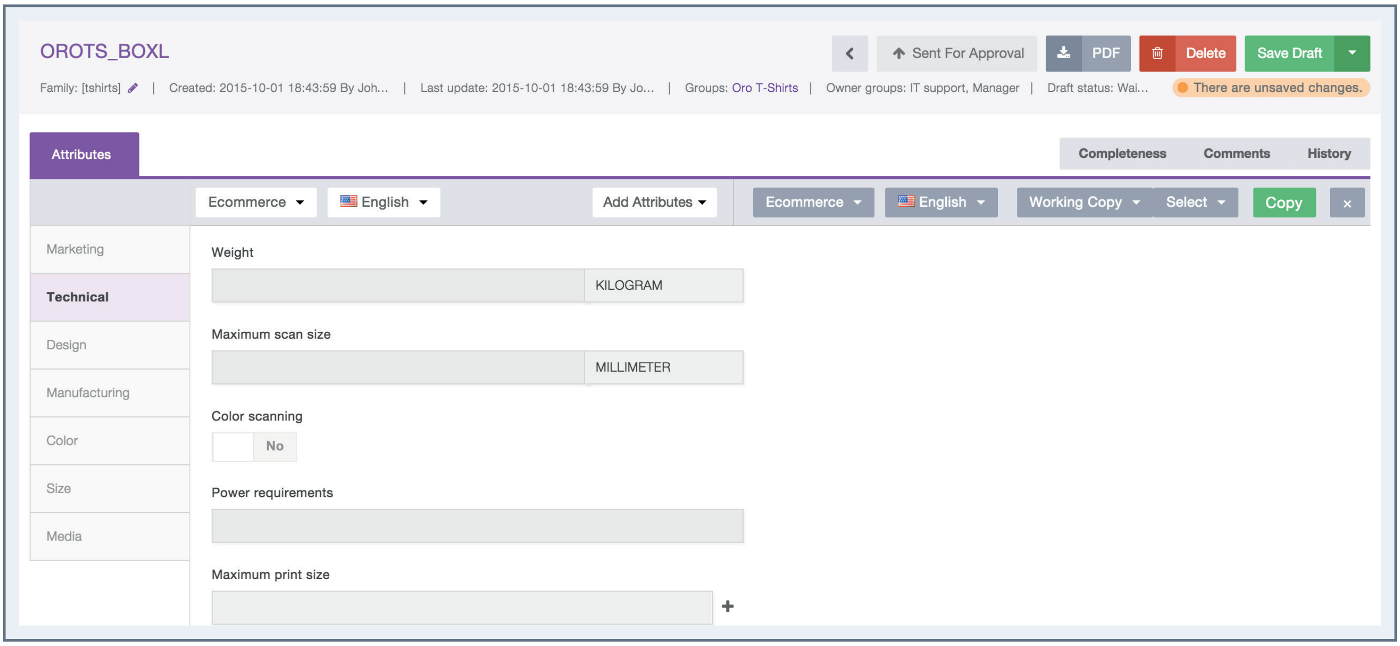


- A new button is prompted in blue “Send for approval“: for further details on this action, please refer to the section “Send my product proposal for approval“.

You can come back later on your product draft version to finish your enrichment work on the product.

Contributing on my current version (Draft)

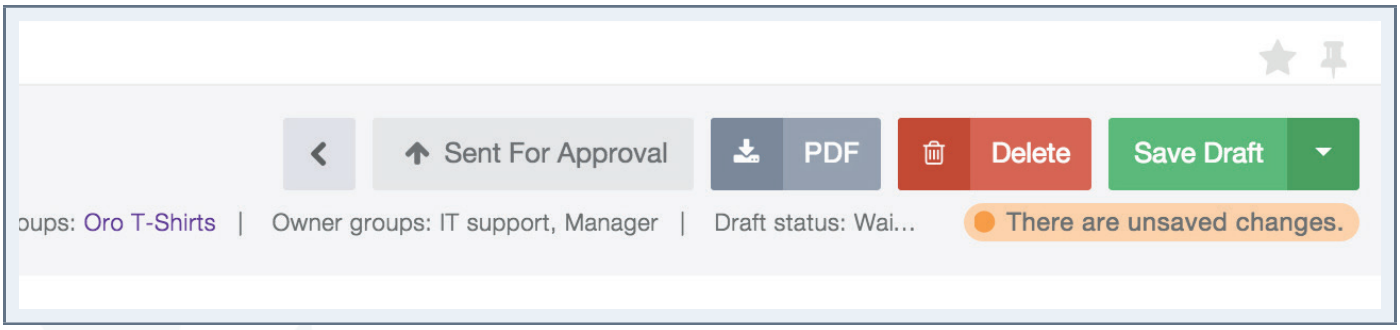
A product form will have the “In progress” status when you propose new values for the product information (attributes), but they have not been yet approved by one of the product managers.



You can send your draft for approval at any time to the product manager. Please refer to the section “Send my product proposal for approval”.

You can also carry on working on the product proposal

If you change an information that you have not yet recorded, it will be added to your draft when you will save it.



For instance: the description attribute, no value has been yet approved. The value you are saving = “example of description” is added to your draft.

If you edit an information you have already saved, the new changes will be saved in your draft. The old values will be deleted.

For instance: the description attribute, no value has been yet approved. The saved value is “example of description “ but you change it for the value “This product is awesome”. When you click on the “Save

Draft" button, the value "This product is awesome" will be added to your draft, and the value "example of description" will be deleted from your draft.

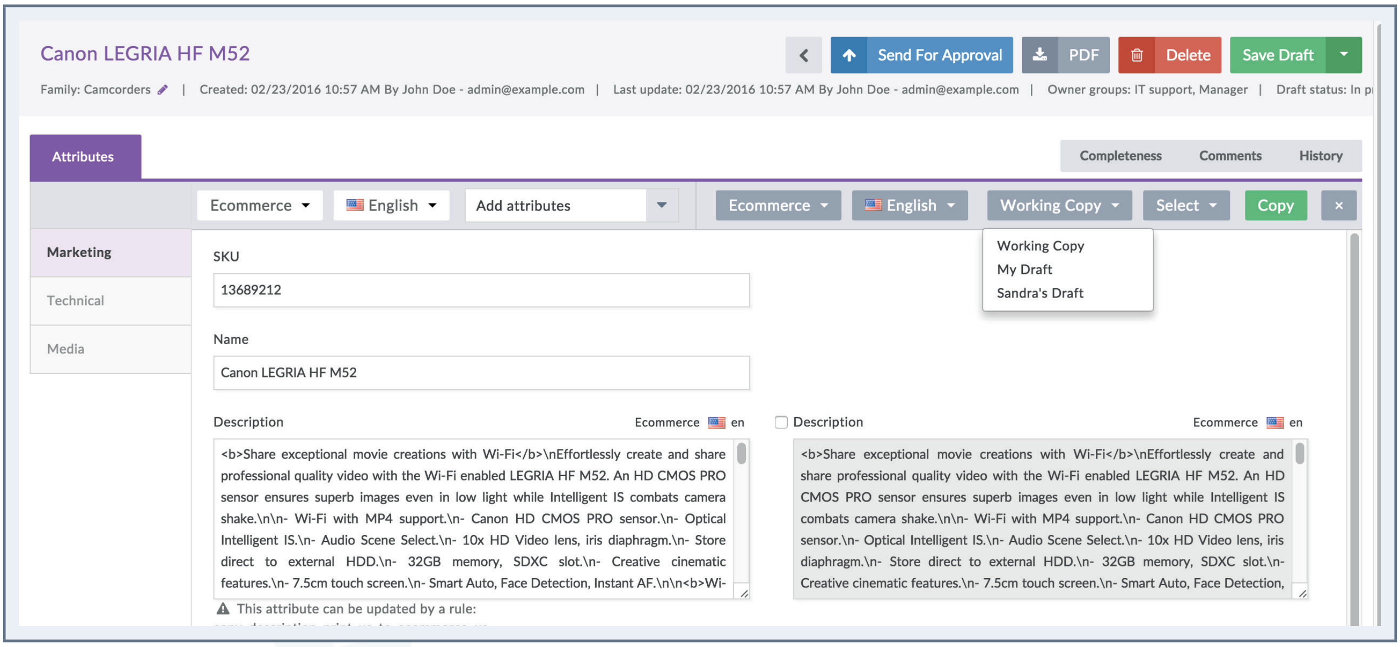
If you propose the same value as the one that has been already approved, the value will not be added to your draft.

For example: the weight attribute. Its approved value corresponds to "5 KG". You have changed the value to "50 KG" and you save the value. Then you realize that you have made a mistake and enter "5 KG" and you click on the save button. No value will be recorded in your draft for the "Weight" attribute. It will remains "5 KG".

Viewing the working copy or my draft in another locale and/or channel

To view the values of a working copy or your draft (in another locale / channel) or another contributor draft:

1. Click on the button "Compare / Translate" to display the right panel.
2. By default, the values of the working copy are displayed. However, you may change the selection with the drop down list on top of the right panel (see below).



3. You can change the channel and the locale in the two drop down lists on top of the right panel.

Selection	Attributes and values displayed
Working copy	Only the attributes with a different value between my draft and the working copy are displayed.
My draft	All the attributes values updated in my draft are displayed.
Contributor's draft	Only the attributes with a different value between the contributor's draft and the working copy are displayed.

Contributing to my product proposal awaiting for approval

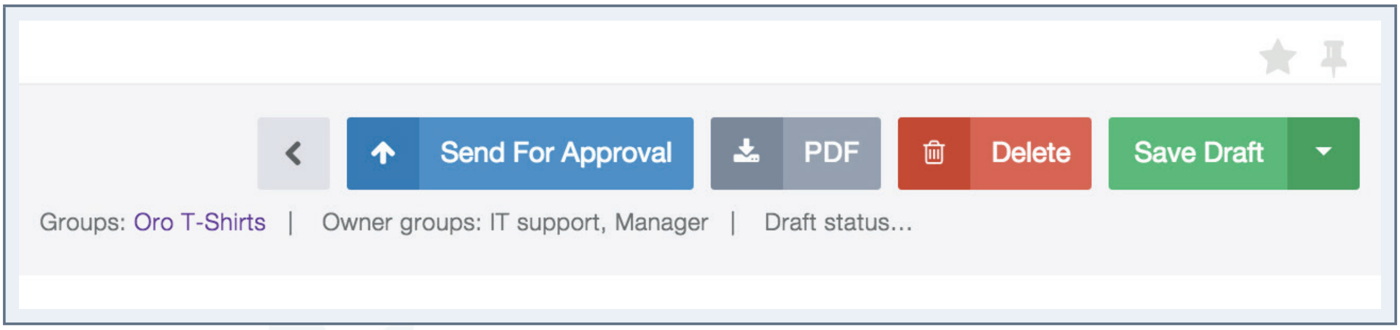
A product form will have the "Waiting for approval" status when you have entered new values for the product information (attributes), and that they have been sent to product managers for approval, but the new values have not been yet validated.

If you have forgotten a product change or want to complete your proposal, you can do it like for the other statuses.

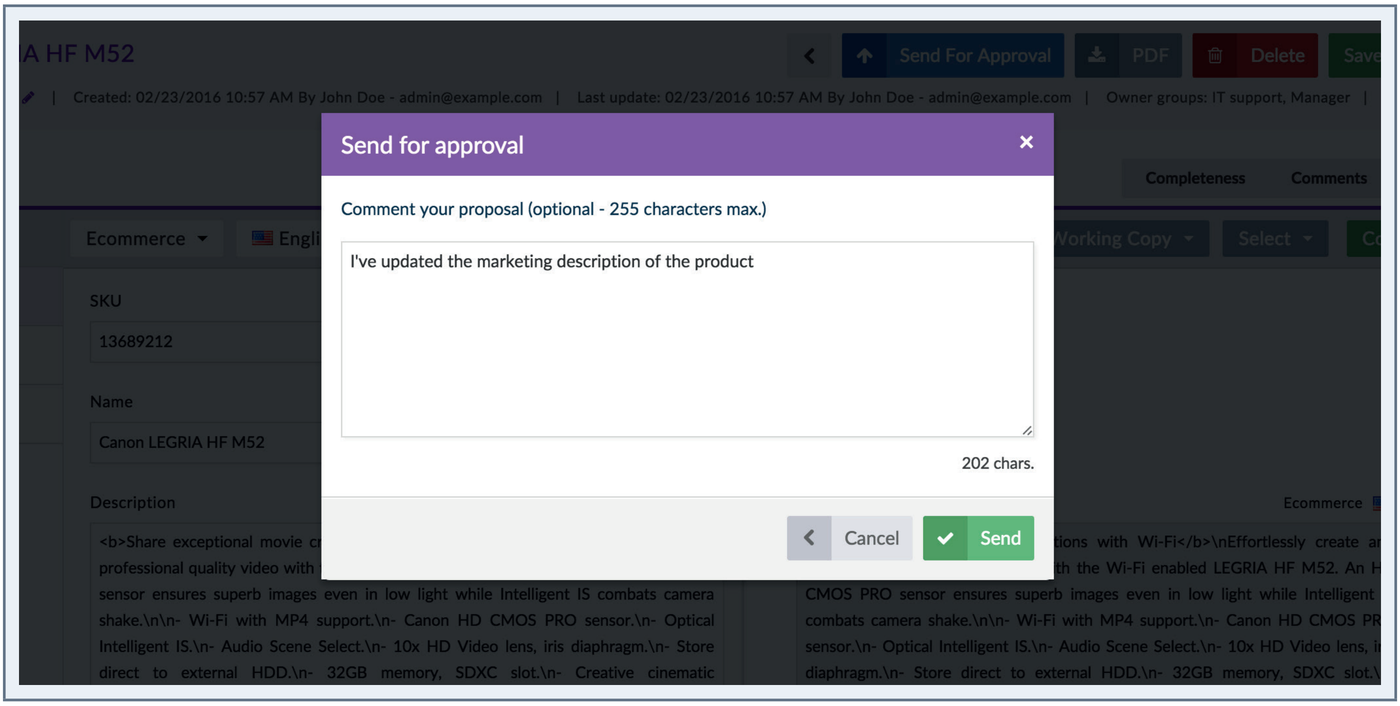
When you save your work, your draft will be updated and the product status will go back to "In progress" and it will be again sent for approval to the product managers who review your changes.

Sending my product proposal for approval (Enterprise Edition only)

Once you have created your product draft, a blue button appears in the header of the product form: "Send for approval".



1. This button allows you to turn your input into a proposal that will be submitted to the product managers so they can approve or reject your proposal.
2. You can add an optional comment for the product managers about your proposal.
3. Click on "Send" to send your proposal for approval.
4. A notification is sent to the product managers to review your proposal.



Reviewing of my proposal by the product managers (Enterprise Edition only)

When the product managers review your proposal, they can:

- Approve or reject all your proposals: they can approve everything or fully reject the proposal.

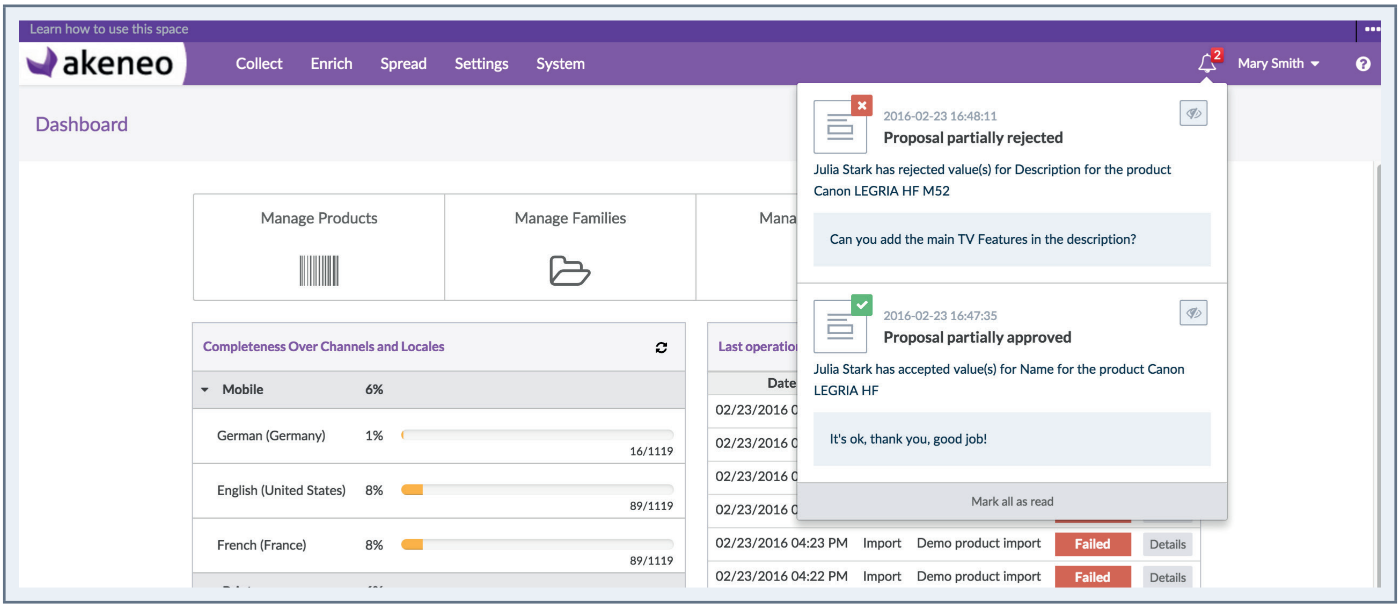
- Approve or reject partially your proposal: they can approve or reject only some changes of the proposal.

Product manager action	My Draft	Working copy	Draft Status
Approve all your proposal	Your draft is deleted.	The values proposed in your draft are saved in the product	Working copy
Reject all your proposal	Your draft is still there with your changes.	No update of the product	In progress
Partially approve your proposal	The changes approved are deleted from your draft. Your draft contains only your changes not reviewed.	The values approved are saved in the product	Waiting for approval

Product manager action	My Draft	Working copy	Draft Status
Partially reject your proposal	Your draft is still there with your changes rejected and your changes not yet reviewed.	No update of the product	Waiting for approval

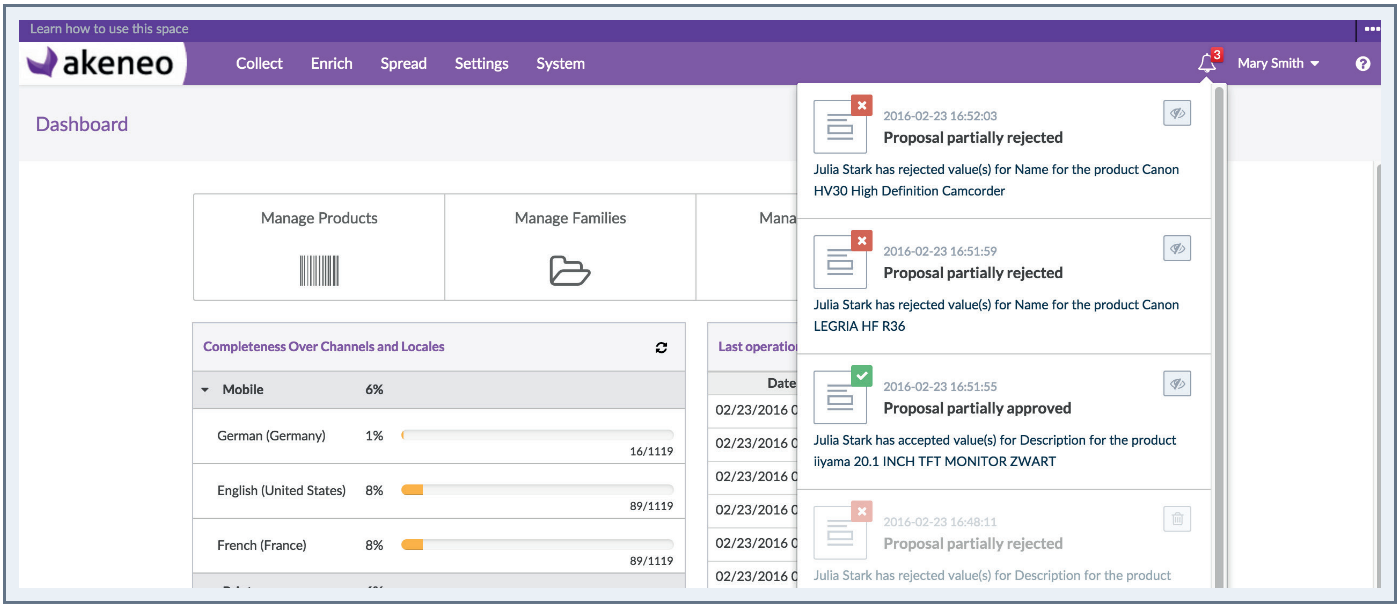
When the product managers validate, reject or delete your proposal, you receive a notification with an optional comment.

Click on the proposal's notification to open the product.



When the product managers validate or reject partially your proposal, you receive a notification with the details of the changes approved and an optional comment.

Click on the proposal's notification to open the product.

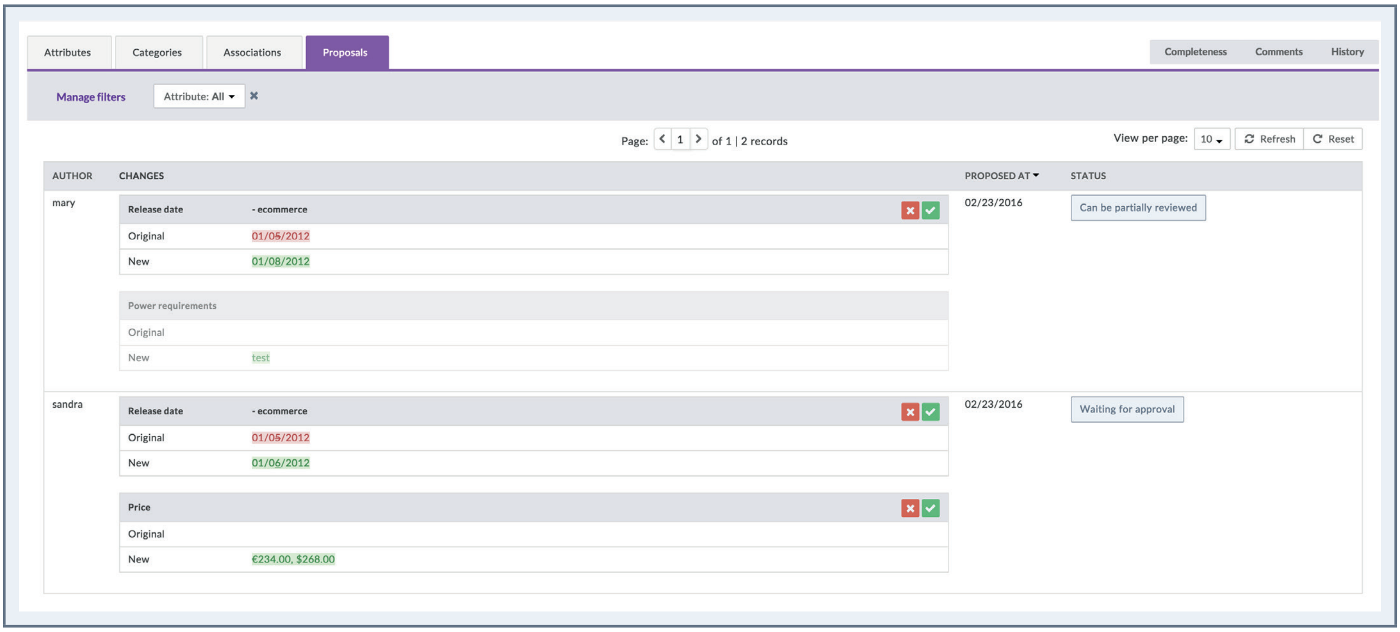


Note for Enterprise Edition

If you didn’t receive a notification after the products managers have validated or rejected your proposal, check your notifications preferences in your user account.

Managing the proposals of a product (Enterprise Edition only)

A proposal is a set of values for product attributes, written by a single contributor. For instance, if two contributors are modifying the same product, 2 proposals will be then created



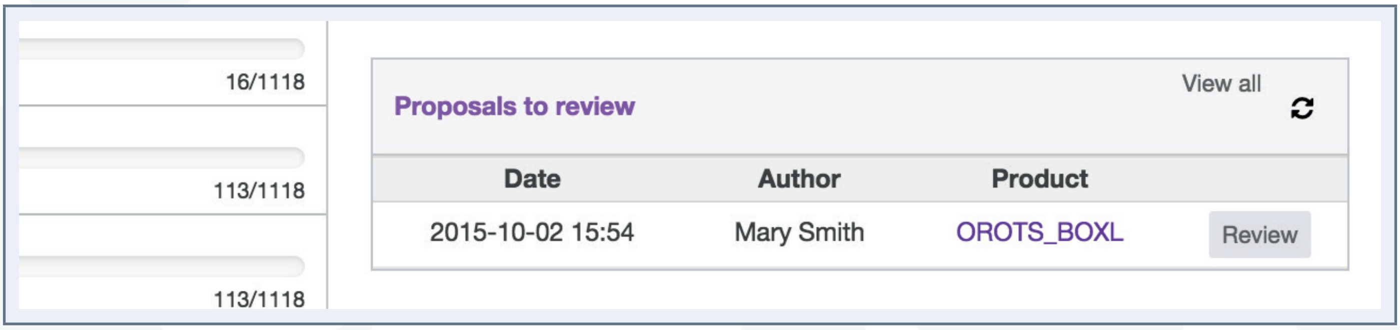
According to your rights, you will be able to list these proposals, to view them in order to approve, reject or even delete them.

Listing the proposals to review

You have 2 ways to list the product proposals:
- From the Akeneo dashboard, through the “Proposals” widget.
- From the menu in Enrich > Proposals.

Any user whose configuration in the PIM defines his role as in charge of some products (role of a product owner), has a specific entry in the menu: Enrich > Proposals. This page allows to list all the proposals of all the products you own, and that you have to review (the proposals with the status “In progress” are not displayed in the grid).

Any user whose configuration in the PIM defines his role as in charge of some products, has a specific widget on the Akeneo Dashboard.



This widget lists the last 10 proposals submitted by contributors to the product manager in charge of reviewing the drafts. Each widget line is a proposal (by product and by user).

Reminder: a contributor can only send one single proposal per product. A proposal can gather several changes on a product.

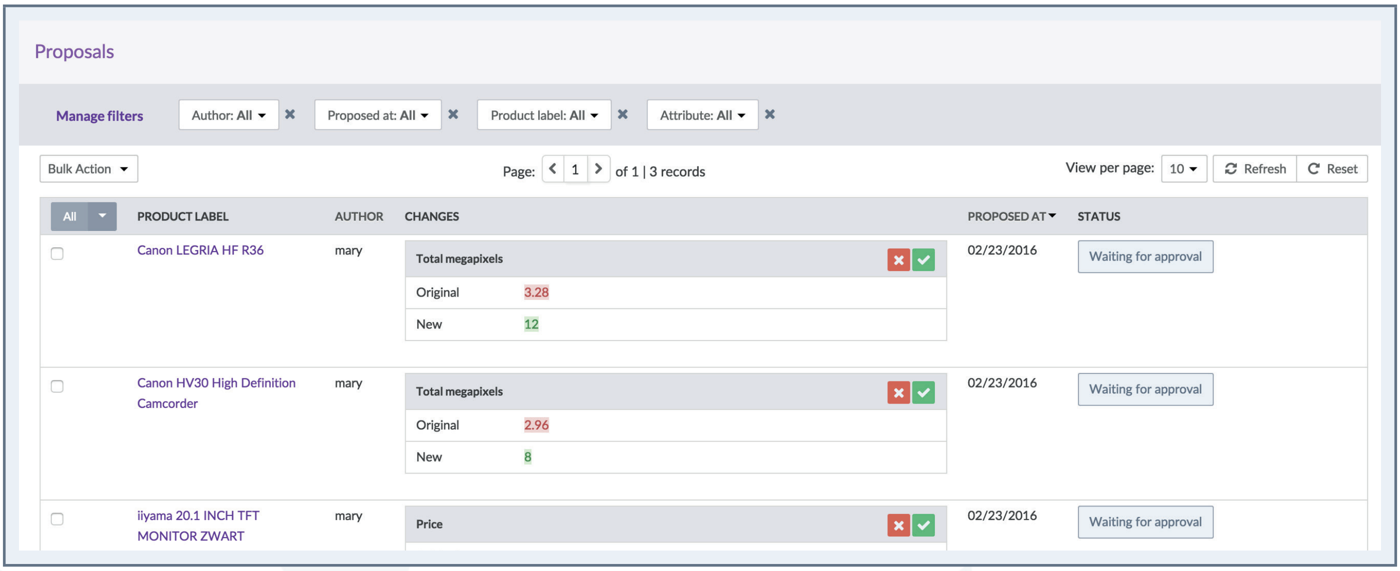
Each proposal has a shortcut button to be reviewed.

Reviewing the products' proposals

You have 4 ways to review products' proposals:

- From the Akeneo dashboard, click on the "Review" button in the "Proposals" widget.
- From the notifications bell, click on the proposal notification displayed.
- From the Product Edit Form, click on the "Proposal" tab.
- From the Proposals Grid, click on the menu Enrich > Proposals.

The two first actions and the last action take you straight to all product proposals, whereas the 3rd one will only display you the Product's proposals.



Note for Enterprise Edition only

If you didn't receive a notification when the contributors send to approve a proposal, check your notifications preferences in your user account.

The proposals have the following properties:

- An author (aka the contributor),
- The changes made on the attributes, whatever the locale or the channel is,
- A date and time sent for review,
- A status.

Some filters are available on the proposals' grid:

- Author: to filter on the contributor of the proposal
- Proposed at: to filter on the date sent to review the proposal
- Product label: to filter on the product updated by the proposal
- Attribute: to filter on the attribute concerned by the proposal

You can review the proposals and its changes according to your permissions on attributes groups and locales:

- You view only the changes you have the view permissions on.
- You can review (approve or reject) only the changes you have the edit permissions on.

Statuses of the proposals

A proposal can have several statuses, according to your permissions (on attributes groups and locales):

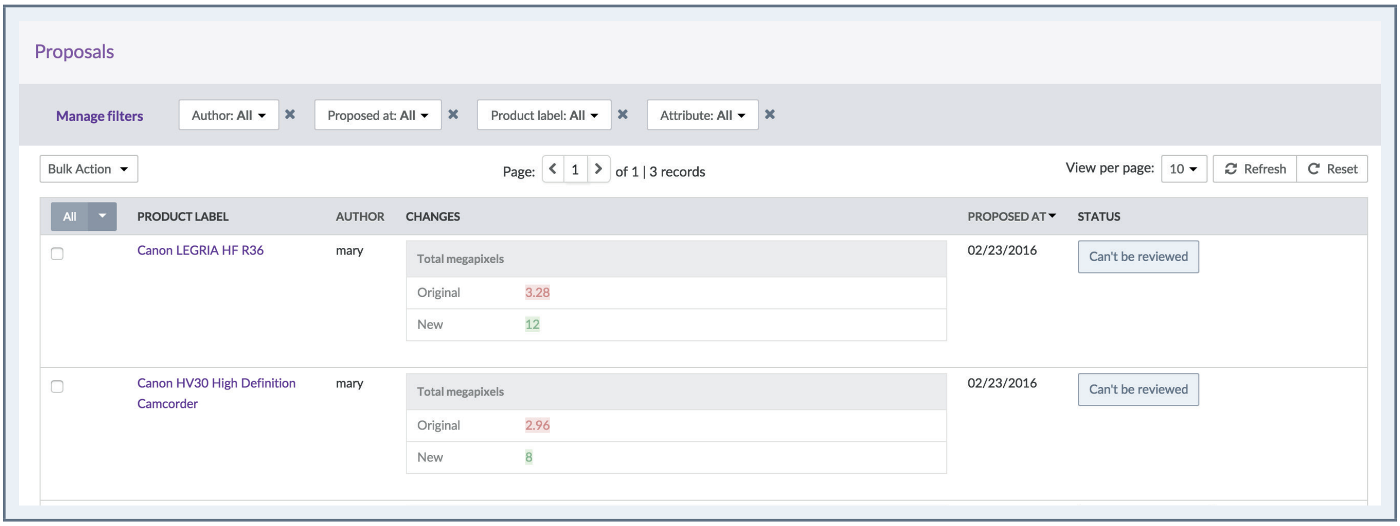
Status	Details	Actions available
In progress	The contributor is still working on the proposal, it is not yet completed. Hence it is not possible to review it (it is not displayed in the proposals grid).	You can delete the draft in the Product form, “Proposal” tab.
Waiting for approval	The proposal is complete and has been sent by the contributor. You have all the permissions to review the proposal changes.	You can approve or reject all the proposal.
Can be partially reviewed	The proposal is complete and has been sent by the contributor. You have partial permissions to review the proposal changes.	You can approve or reject only the changes on values with edit rights.
Can't be reviewed	You have no permission to review the proposal changes.	No action is available on the proposal.

Notes

1 - For the proposals having the statuses “Can’t be reviewed” and “Can be partially reviewed”, you cannot review the proposals or all the proposals because you don’t have the right to edit some or all attributes values in the proposal. Please contact your administrator to update your permissions.

2 - The proposals with the status “In progress” are not displayed in the proposals grid, only in the product form tab “Proposal”.

3 - If you have only view rights on some changes, the changes are displayed but you can do any action for this change.



Reviewing actions on proposals

A product manager can review all the proposals (approve or reject a proposal) or can partially review a proposal (approve or reject a change or somes changes) according to her/his permissions.

Product manager action	Contributor’s draft	Product working copy	Proposal
Approve a proposal	The values approved are deleted from the draft.	The values approved are saved in the product	The values approved are deleted from the proposal.
Reject a proposal	The draft contains the changes rejected and not yet reviewed.	No update of the product	The values rejected are deleted from the proposal.

Product manager action	Contributor's draft	Product working copy	Proposal
Approve a change	The change approved is deleted from the draft. The draft contains only the changes not reviewed.	The value approved is saved in the product	The value approved is deleted from the proposal.
Reject a change	The draft contains the changes rejected and not yet reviewed.	No update of the product	The values approved is deleted from the proposal.

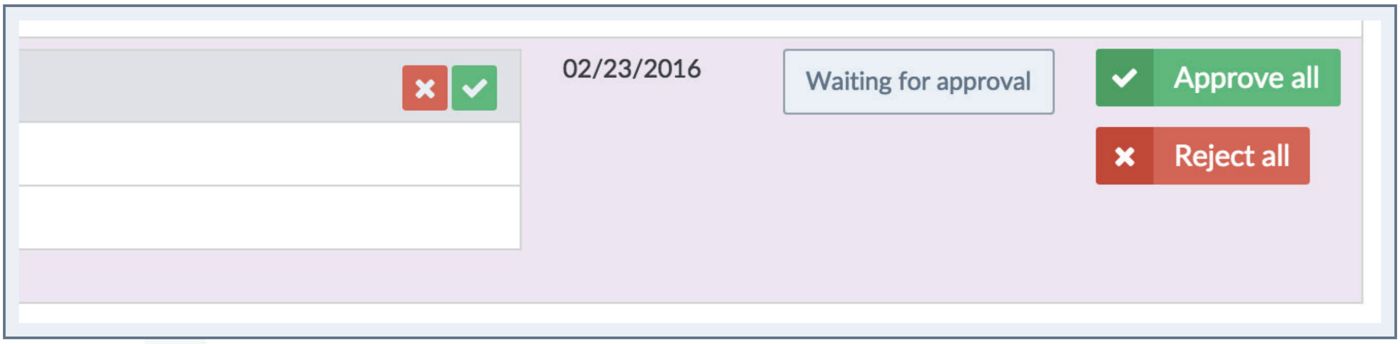
Approving a proposal

Approving a proposal will validate the proposed values. When a proposal is validated, the values are added to the product, and the PIM creates a new product version. Finally the proposal is deleted from the list of the product proposals.

To approve a proposal:

1. Go on the products' proposals list.

2. Drag your mouse over a proposal having the statuses "waiting for approval" or "can be partially reviewed". The proposal will be greyed out and the "Approve all" icon will appear.

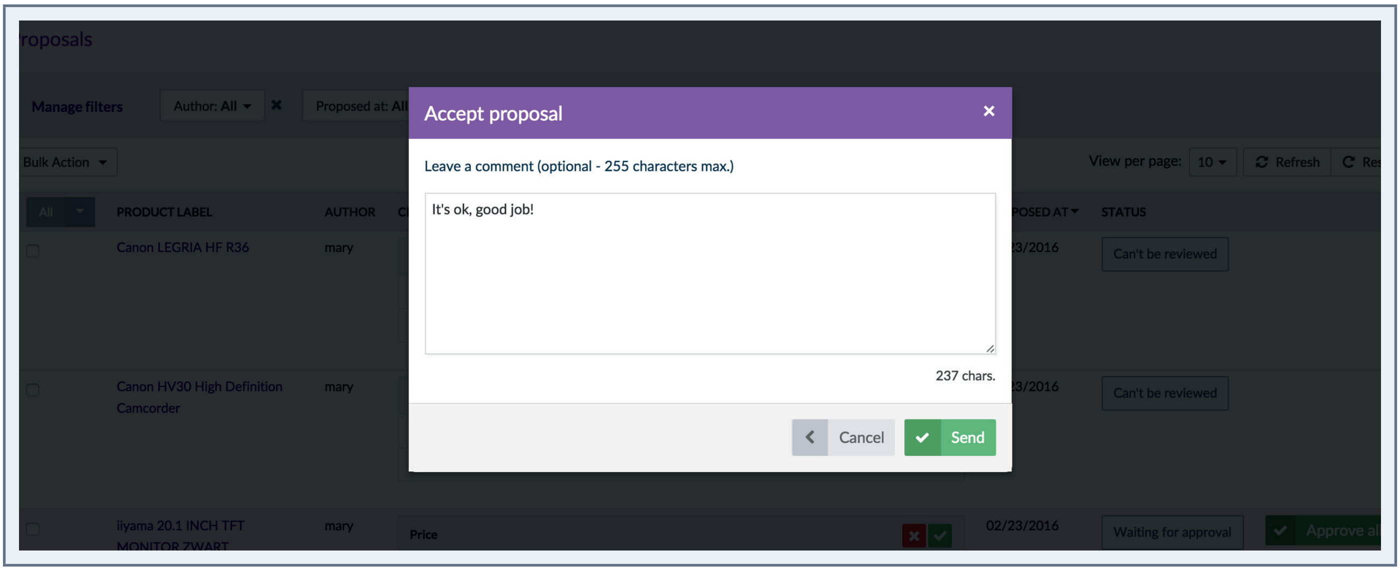


3. Click on the check mark button to accept the proposal

4. A window appears displaying a comment text box, you can leave a note for the contributor.

Click on "Send" to validate the proposal (with or without a comment). A notification is sent to the contributor.

To partially approve a proposal, click on the green check mark right above the suggestion.



The popin window is closed and a green flash message appears on your screen. Only the changes on values with edit rights are approved, added to the product and deleted from the proposal.

If you have the permissions to approve all the changes (status "waiting for approval"), the proposal is fully deleted. Otherwise the proposal is kept with the changes not approved and the status is updated from "can be partially reviewed" to "can't be reviewed". Another product manager will have to review these changes.

You can check that the product information has been well added to the product if you go to the Product's "Attributes" tab. You can also check that a new product version has been well created in the "History" tab.

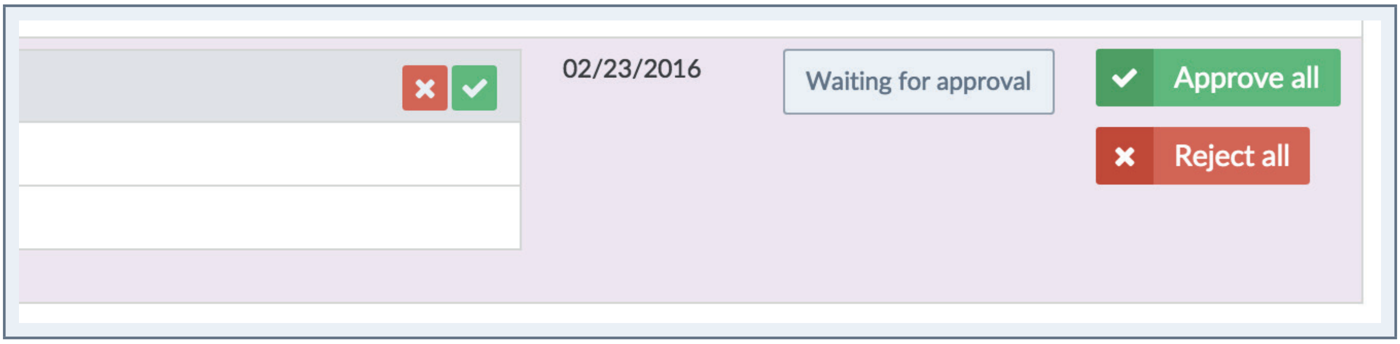
Rejecting a proposal

Rejecting a proposal will refuse the suggested values (with edit rights) and it enables the contributor to change the proposed values or even delete the proposal.

To reject a proposal:

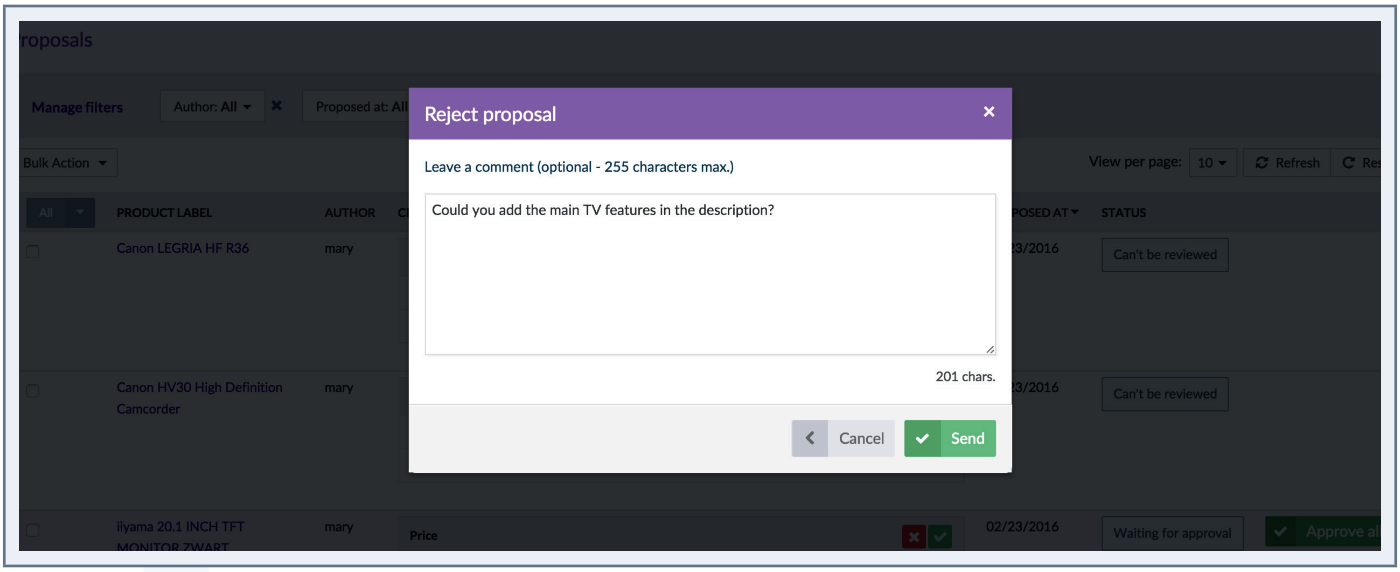
1. Check the product proposals.

2. Drag your mouse over the proposal having the statuses " waiting for approval" or "can be partially reviewed". The proposal will be greyed out and the "Reject all" icon will be displayed.



3. Click on the button red cross to reject the proposal.
4. A window appears displaying a comment text box, you can leave a note for the contributor.
5. Click on “Send” to reject the proposal (with or without a comment). A notification is sent to the contributor.

To partially reject a proposal, click on the green check mark ☒ right above the suggestion.



The popin window is closed and a green flash message appears on your screen. The rejected values are not added to the product.

Only the changes on values with edit rights are rejected, added to the contributor’s draft and deleted from the proposal. If you have the permissions to review all the changes, the proposal is moved to the status “In progress”.

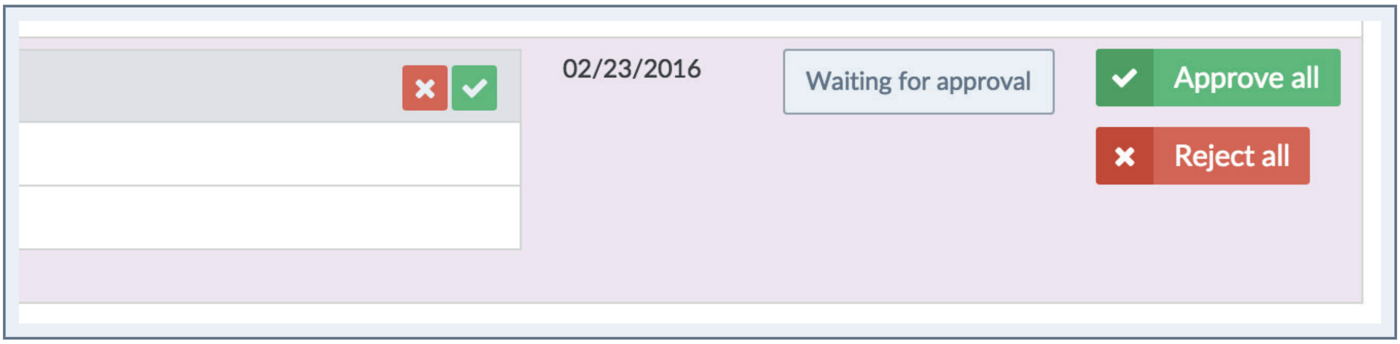
Otherwise the proposal is kept with the changes not yet rejected and the status “can’t be reviewed”. Another product manager will have to review these changes.

Approving a change

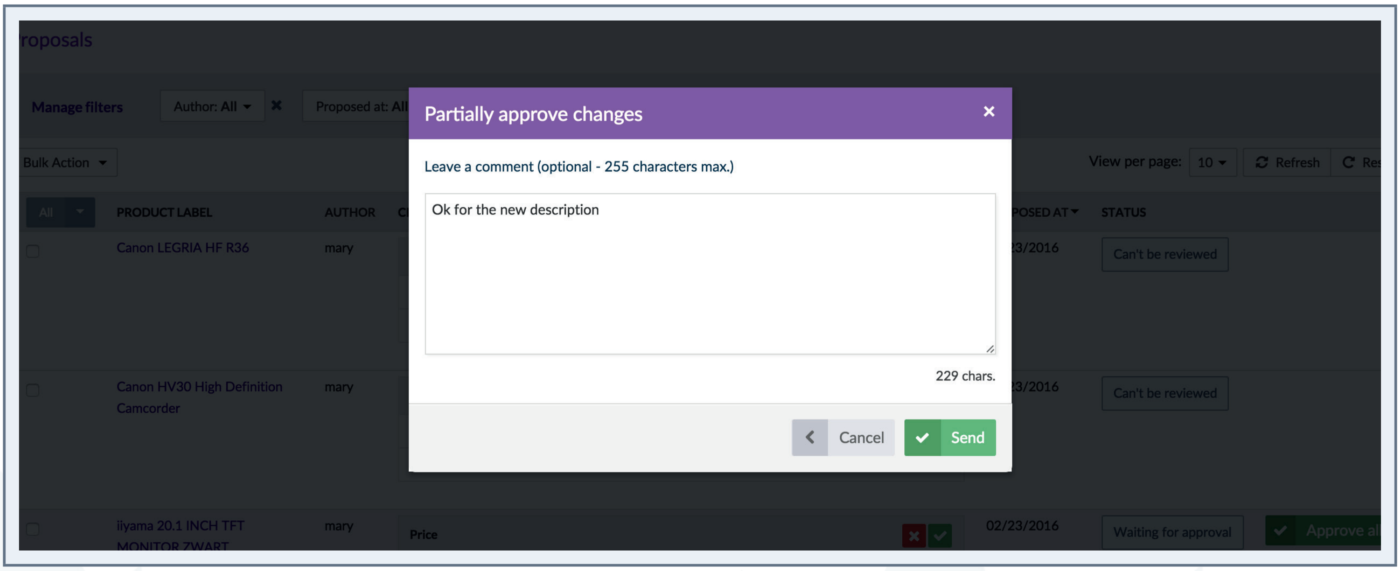
You can approve each change of the proposal one by one, according to your permissions. When a change is approved, the value is added to the product, which creates a new product version. The change approved is deleted from the proposal.

To approve a change:

1. List the product proposals.
2. For the proposals with the status “waiting for approval” or “can be partially reviewed” and the changes on values with edit rights, the icon is displayed.



3. Click on the button to approve the change.
4. You can add an optional comment for the contributor about your approval.
5. Click on “Send” to approve the change. A notification is sent to the contributor.



A confirmation message appears.

The value approved is added to the product and deleted from the proposal.

If there is no more change to review, the proposal is deleted. Else the proposal is kept with the changes not reviewed.

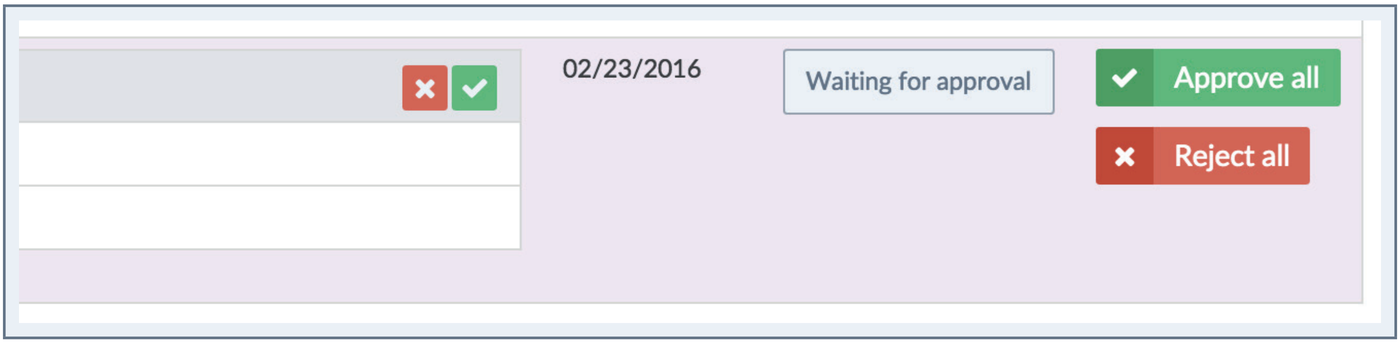
You can check that the product information is added to the product if you go to the “Attributes” tab. You can also check that a new product version has been created in the “History” tab.

Reject a change

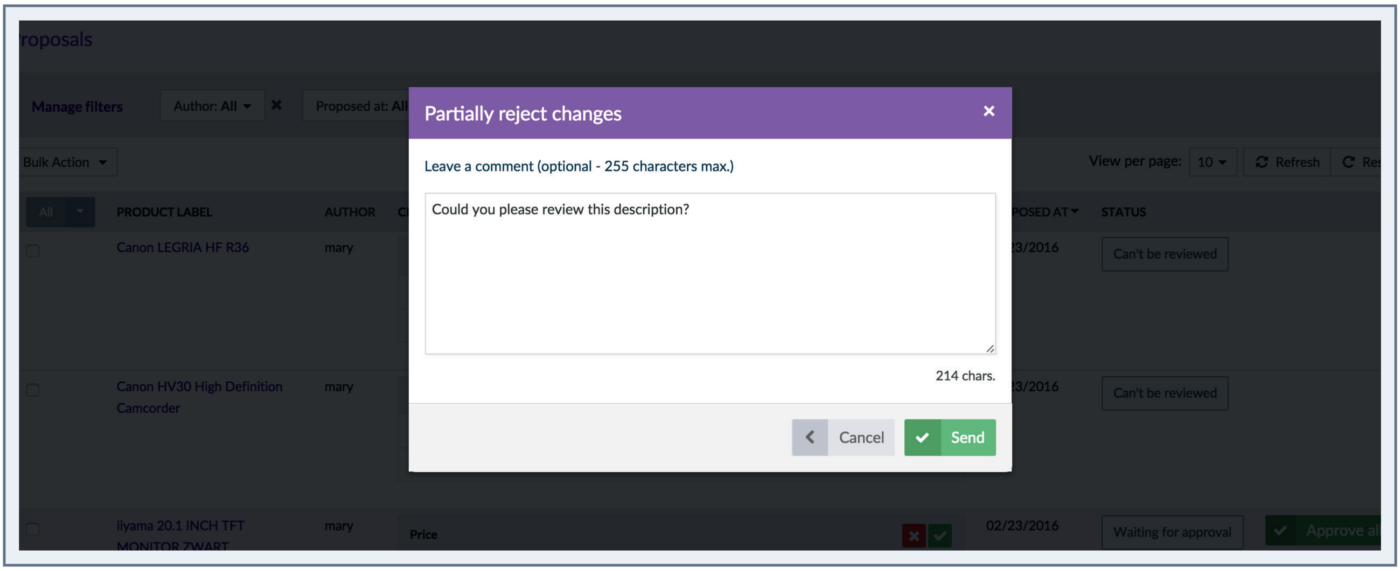
Your can reject each change of a proposal one by one, according to your permissions. When a change is rejected, the value is added in the contributor’s draft. The change rejected is deleted from the proposal.

To reject a change:

1. List the product proposals.
2. For the proposals with the status “waiting for approval” or “can be partially reviewed” and the changes on values with edit rights, the icon ✖ is displayed.



3. Click on the button to reject the change.
4. You can add an optional comment for the contributor about your rejection.
5. Click on “Send” to reject the proposal. A notification is sent to the contributor.



A confirmation message appears.

The value rejected is not added to the product.

The value rejected is added in the contributor's draft and deleted from the proposal.

If there is no more change to review, the proposal is deleted. Else the proposal is kept with the changes not reviewed.

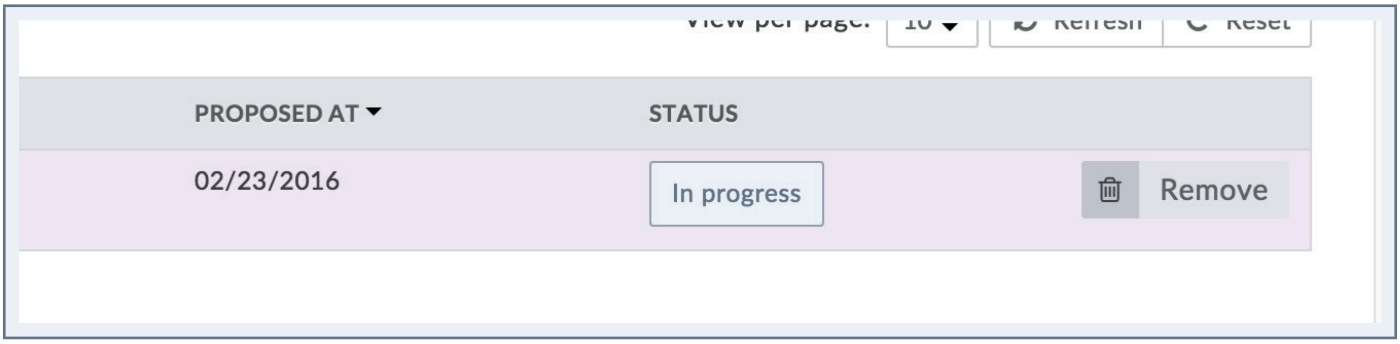
Deleting a proposal

Only proposals having the "In progress" status can be deleted by the product manager, according to his permissions, in the Product Edit Form tab "Proposal".

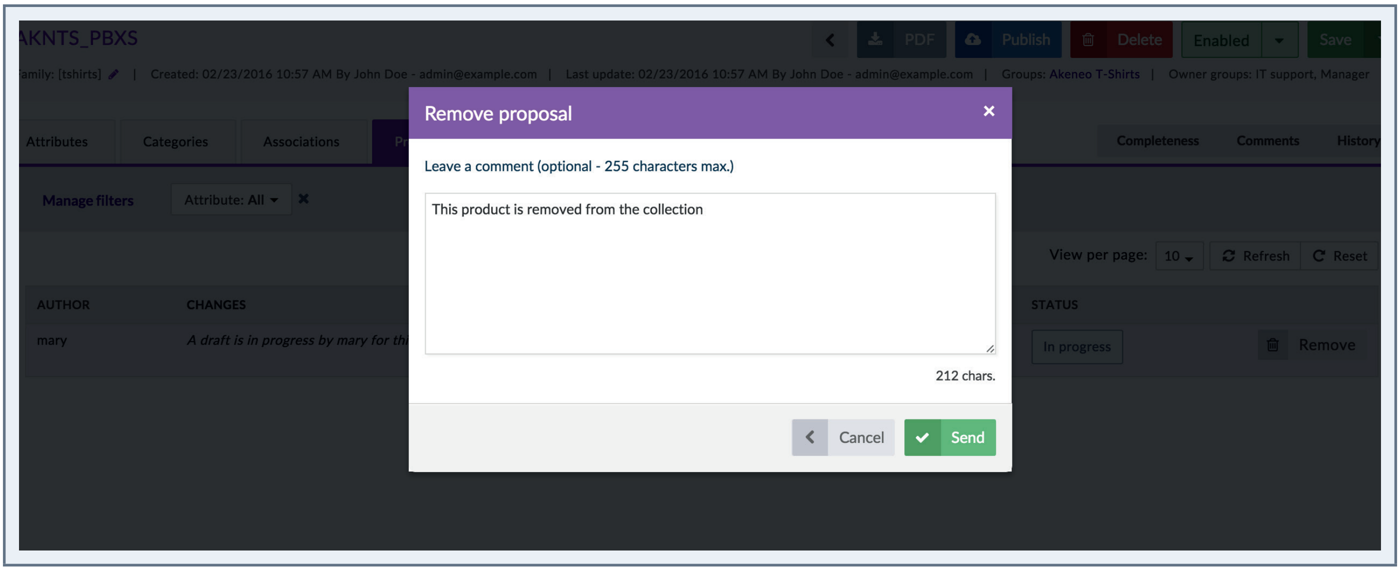
Deleting a proposal updates the list of current proposals in order to make the contributor's work easier. Deleting a proposal also deletes all suggested new values: the contributor will not able to find her/his changes anymore on the relevant product.

To delete a proposal:

1. Open the product and display the tab "Proposals".
2. When mousing over the proposal's line with the "In progress" status, the icon "Remove" will be displayed.



3. Click on the button to delete the proposal.
4. You can add an optional comment for the contributor about your deletion.



5. Click on “Send” to delete the proposal. A notification is sent to the contributor.

The values deleted are not added to the product and the proposal is deleted.

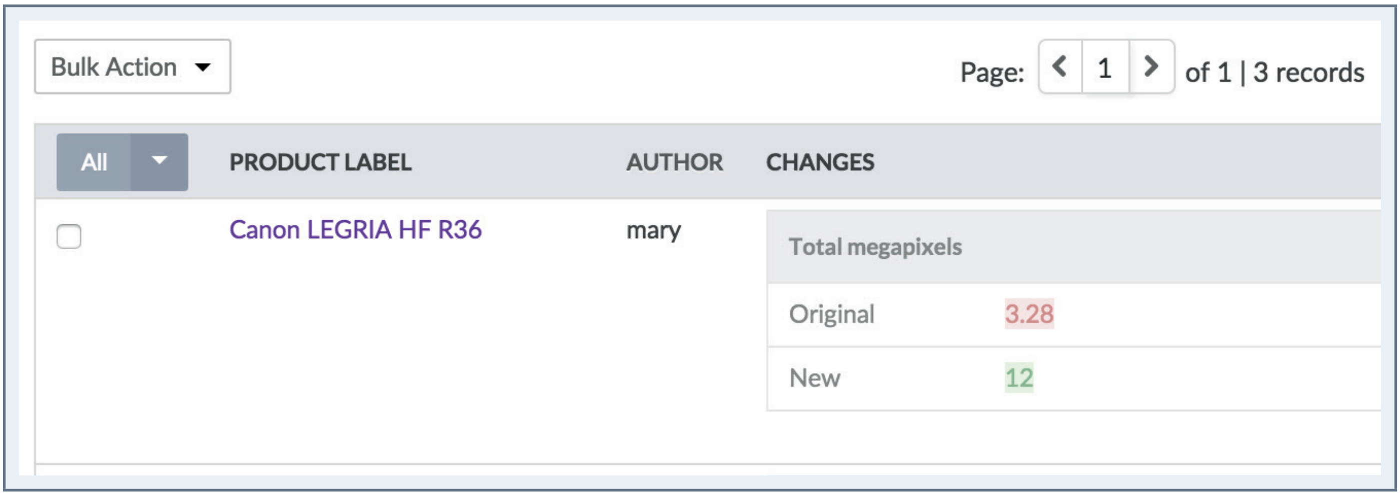
Notes

1 - For the proposal having the “Can’t be deleted” status, you cannot delete the proposal because you don’t have the right to edit a change in the proposal. Please contact your administrator to update your permissions.

2 - If you have edit rights only on some changes of a proposal, only these changes will be deleted in the proposal. The proposal will be kept with the other changes.

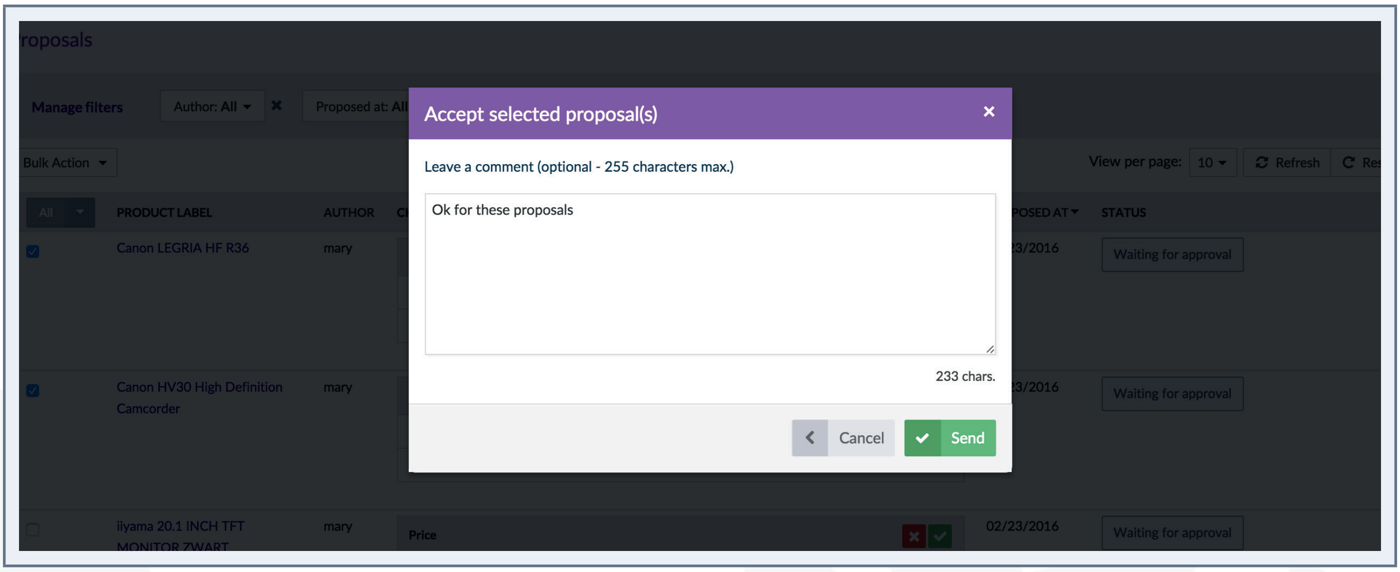
Mass-reviewing the products' proposals

When you have a lot of proposals to review, you can see them all in the proposals grid accessible from Enrich > Proposals.

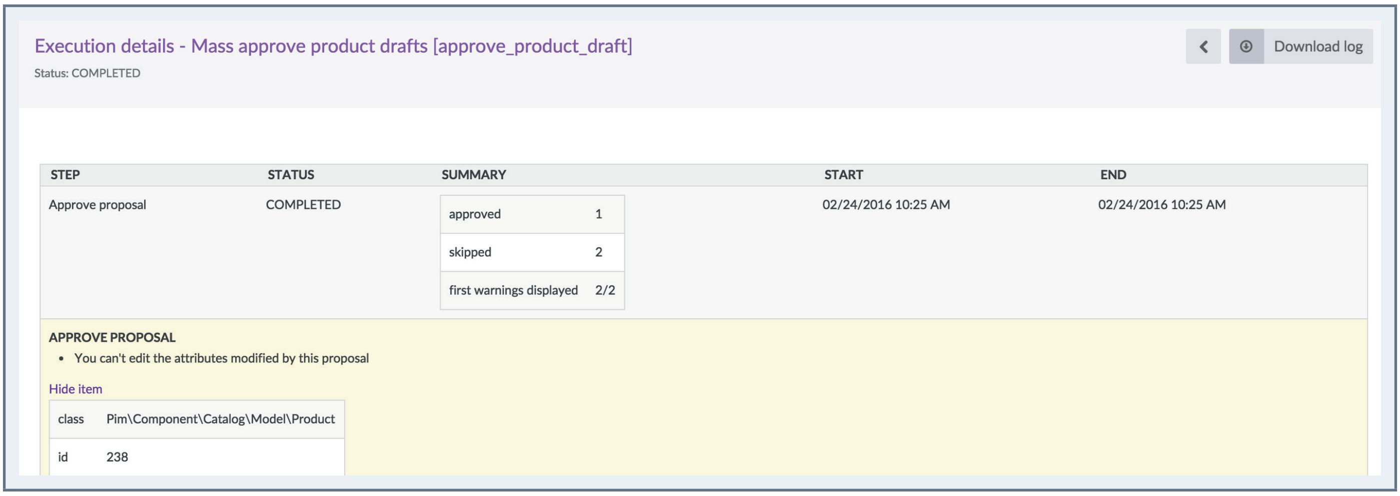


To mass-review the products' proposals:

1. Tick the proposals you want to approve or reject in the proposals grid.
2. Click on the "Approve" or "Reject" action.
3. Add an optional comment for the contributor.
4. Click on "Send" to approve/reject the proposals. A notification is sent to the contributor.



The action is performed as a back-end task. The report page is displayed so you can follow the execution of the action.



Notes

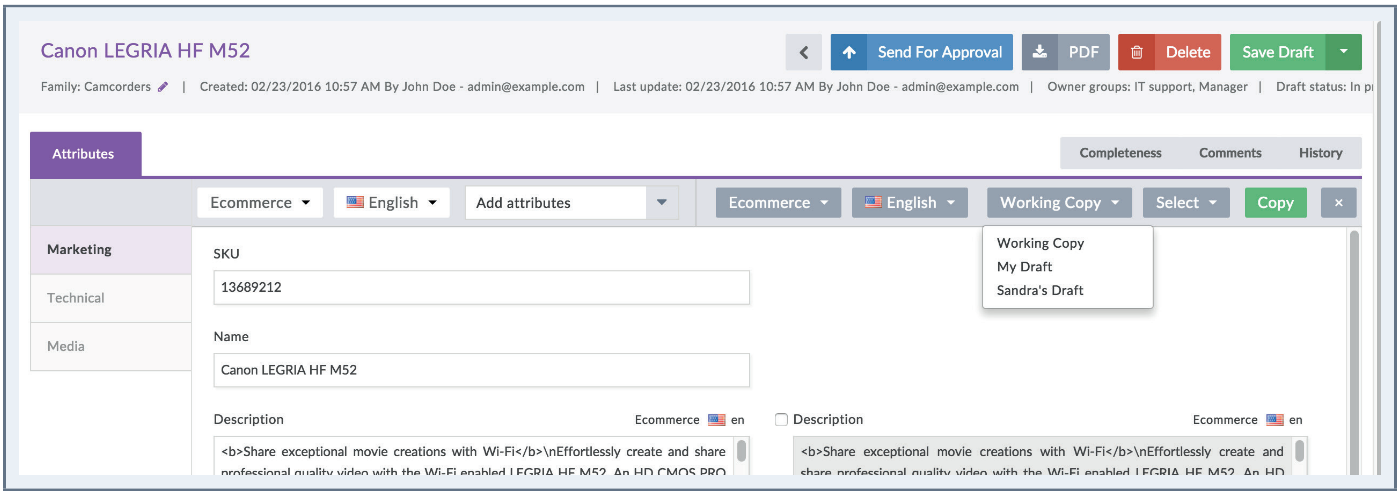
1 - For a proposal having the “Can be reviewed partially” status, you can only review the changes you have edit rights on, the other changes are skipped during the mass review. Please contact your administrator to update your permissions accordingly.

2 - For proposals having the “Can’t be reviewed” status, you cannot review the changes of this proposal because you have no edit right on the values, the proposal is skipped during the mass review. Please contact your administrator to update your permissions accordingly.

Viewing the contributors drafts

You can view the inputs coming from the contributors in order to know what they have already enriched:

1. Click on the “Compare / Translate” button to display the right panel.
2. By default, the product’s values of working copy are displayed. However, you can change this using the drop down menu on top of the right panel (see below).



3. You can change the channel and the locale using the two drop down lists on top of the right panel.

Selection	Attributes and values displayed
Working copy	Only the attributes localizable or scopable are displayed.
Contributor’s draft	Only the attributes with a different value between the contributor’s draft and the product working copy are displayed.

Managing the publishing process (Enterprise Edition only)

In the PIM, you can manage two different versions of a very same product, one published version used for export and another version to prepare for instance the next collection or season of products.

Publishing products defines which version of a product will be used for export. The export of attributes, categories, etc... does not take into account the notion of «publication».

What kind of information is published?

For example, a product is complete for all locales activated for the «Web» channel, this complete version is the 5th. The product is enabled and classified in the Web channel category tree.

When you will «publish this version» of this product, all its information will be saved and the PIM will created a «published» version, this published version will be used for the export.

Once you have published a product, you can still edit all its information, for instance, change its name, its description, its price... Publishing a product allows you to start working on a new version of the product without changing the exported data.

New information will not be taken into account in the export until you click again on «Publish this version».

Use case for associations between published products

Only associations between published products are exported. An association of a published product with a non-published product, will not be visible in the export.

To associate 2 published products, for instance, Product A to Product B: Product B must be published before you create the association between those 2 products.

Use case for other product information

If you change other product information else than attributes or associations, such as category classification, product activation (enabled / disabled), group membership and family change, the information will be updated in the export, they are not kept for the published product.

Publishing a product

How to publish a product?

To publish a product:

1. Open / edit the product page.
2. Click on the "Publish this version" button.

The current version is published. In the "History" tab, the published version is indicated by a blue «P» label as shown below:

If you click on «More» to open the complete History page, the Published version will have the Published label, as shown below:

Publishing several products at once

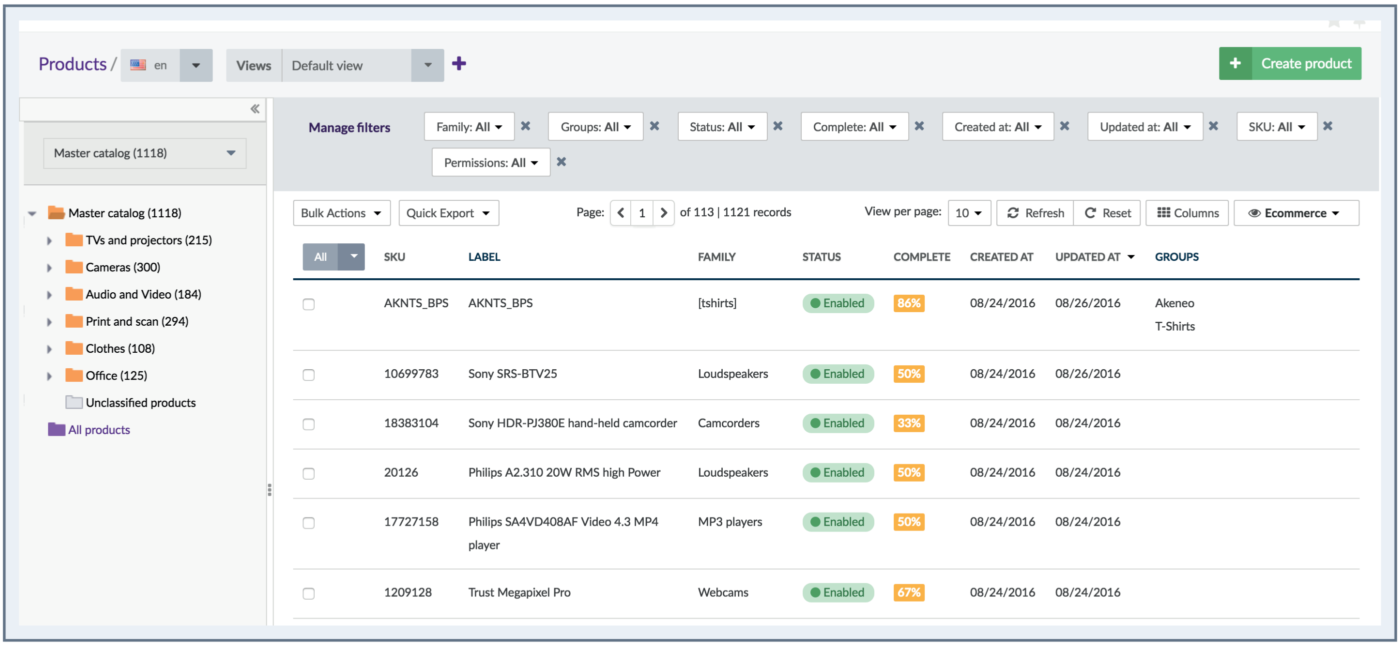
To publish several products simultaneously:

1. Tick the products in the product grid.
2. Click on the Bulk Actions button, select «mass edit» action.
3. Choose the “Publish products” operation:
    - If you are in charge of all the products you have selected, follow the steps and all selected products will be published.
    - If you are in charge of some of the products: a message will inform you that you will only be able to publish the relevant products on which you have the own right. Then, follow the steps and only the products you manage will be published. The other products will not be published.
    - If you are in charge of none of product you have selected, an error message will inform you that you do this action you do not have permission to publish these products. Click on the “Back” button to exit the mass edit process.

Checking the published products

To check which products are published:

1. Go to Enrich > Published products.
2. The published product grid is the same as the product grid.



But some features will not be available on this grid:

- You will not be able to create a new product from this page,
- You will not be able to delete any published products,
- You will not be able to modify any published products.

The views are specific to the published product grid. Hence, the views of unpublished products are not shared with the grid of published products.

Notes

1 - Like for the product grid, you can define a default view when you open the published product grid in your user account, refer to Change your default preferences.

2 - This option is available in your account, only if you have already created a custom view in the published product grid, if not, the field will not appear.

The attributes, families, groups, and categories are taken into account by published product versions and cannot be deleted.

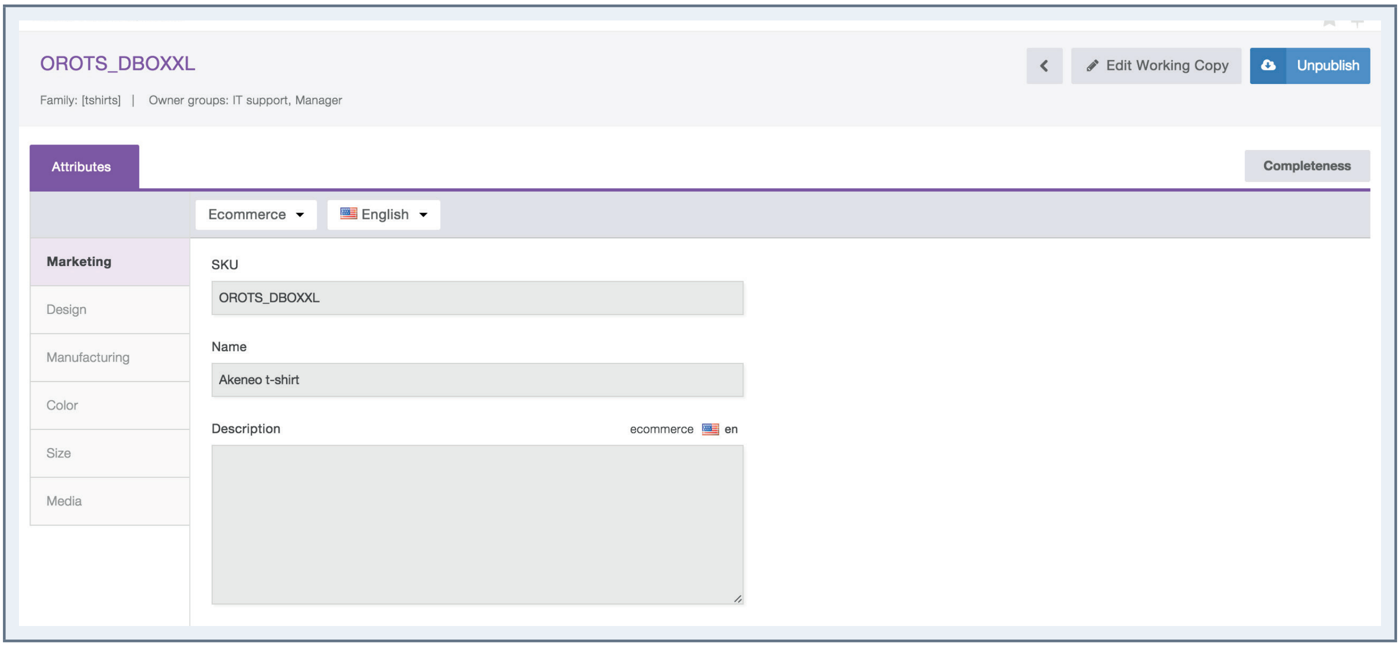
The visual guide to mass edit offers to execute specific operations on published products, just like “unpublishing products”.

It is not possible to edit published products, you can only view them.

Viewing a published Product Edit Form

To view a published product form:

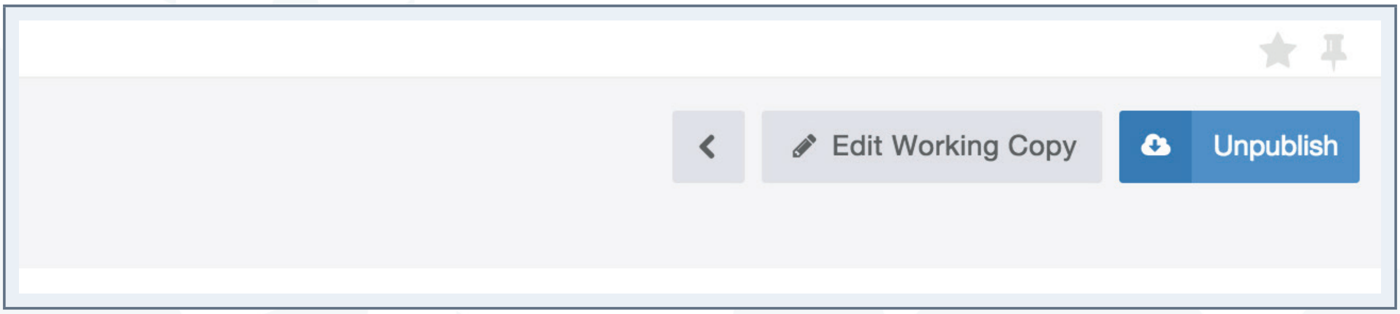
1. Go to Enrich > Published products.
2. Click on the product.
3. The Product Edit Form is displayed.



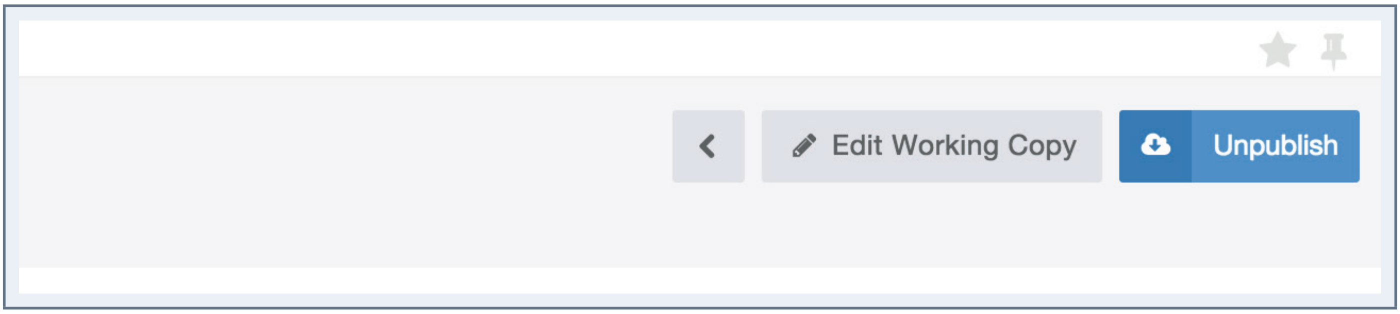
The display is the same as the unpublished product edit form. For more information, you can refer to the section, "Viewing a product form". Also, if you do not have the appropriate rights to see some attribute groups at least, these latter will not be displayed.

When you are in charge of the published product which is viewed, there are two buttons available in the header on the right side:

- Edit the current product version (working copy): clicking on this button will redirect you to the Unpublished Product Edit Form.



- Unpublish



Unpublishing products

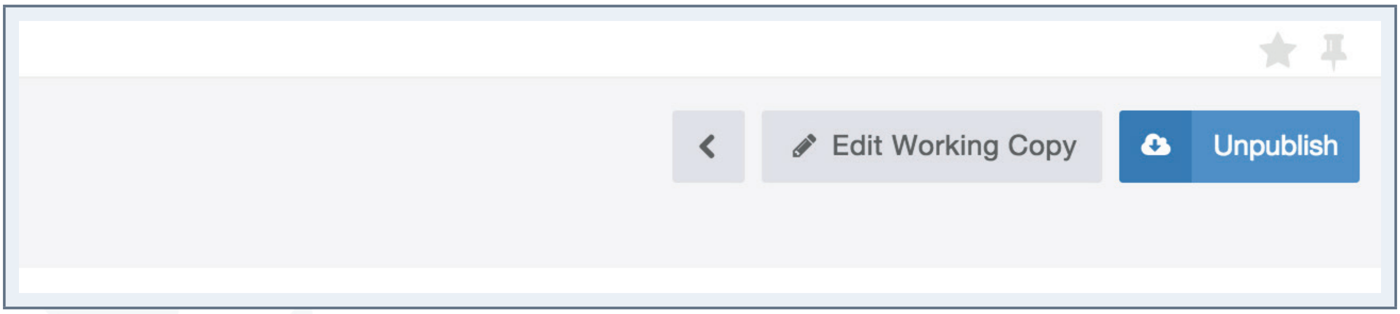
Unpublishing products remove the product's version from being used in the exports.

Unpublishing products only impacts the export of products. The export of attributes, categories, etc... does not take into account the concept of unpublishing product.

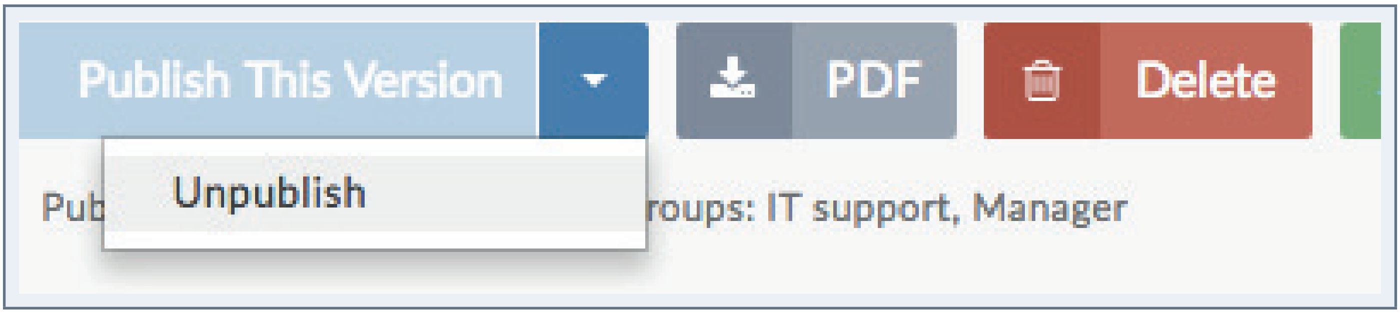
Unpublishing a single product

To unpublish one product:

1. Go to Enrich > Published Products or Enrich > Products.
2. Click on your product.
3. Click on the "Unpublish" button if you're on the published version (see screenshot below).



4. Click on small arrow nearby the Publish this version button and select Unpublish if you are on the unpublished product grid.



The product will be no longer published. The product will not be listed anymore in the published product grid.

Unpublishing several products at once

To unpublish several products at the same time:

1. Go to Enrich > Published products.
2. Tick the products in the grid.
3. Click on the Bulk Actions button, and select the Mass Edit action.

SCREENSHOT ZOOM BULK ACTION MENU

1. Select the “Unpublish Products” operation:
   - If you are in charge of all selected products, follow the steps and all products will be unpublished.
   - If you are in charge of only part of the selected products: a message will appear to inform you that you can only unpublish the products for on which you have own rights. Then follow the

next steps and only the products you own will be unpublished. The other products will not be unpublished.

- If you are in charge of none of the selected products: an error message will appear to inform you that you cannot unpublish the products because you do not have the rights to do so. Click on the “Back” button to exit the mass edit process.

The combination of actions to unpublish / restore a version allows to push new information to a product version.

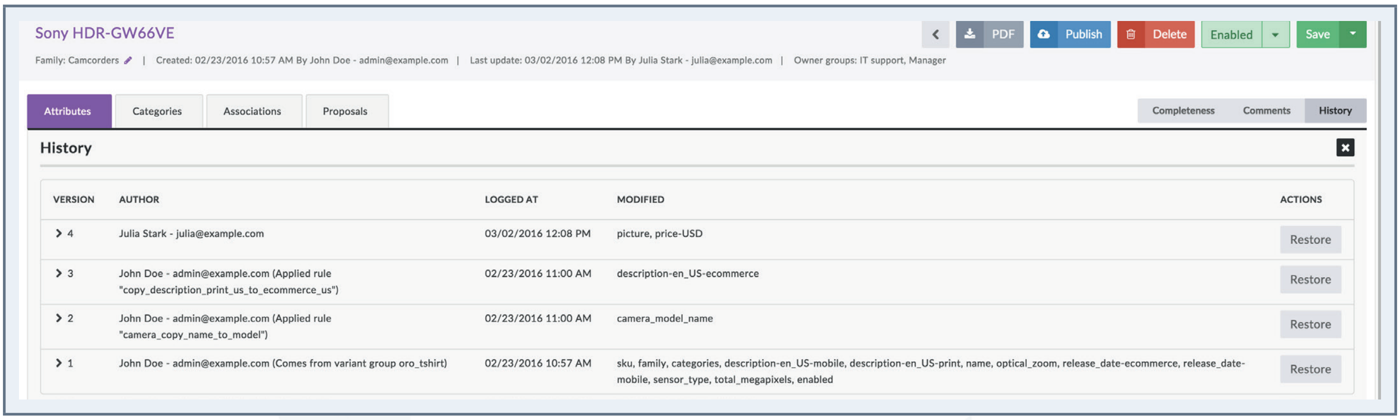
Restoring a product version (Enterprise Edition Only)

Just picture the following case: you have a published product, which information is disseminated in different channels. You are currently enriching the product forms: new photos, more detailed description, new price. But a new legislation compels you all at once to update your current published version to push new information about the product: its weight for instance. Unfortunately your improvements on the product page are not completed and still you do not want to publish them. What can you do?

Akeneo PIM allows you to restore your published version in order to work on it and get back to your latest working copy afterwards.

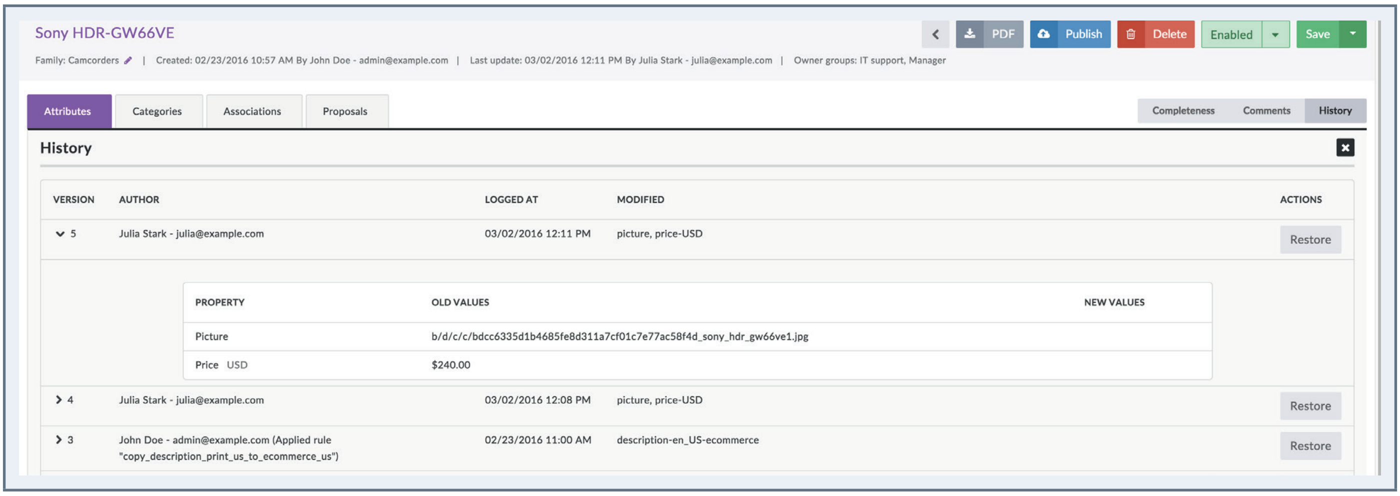
What does it mean to restore a product version?

Restoring a version means reverting the product to an earlier version. For example, if you have 15 product versions, it is possible to go back to the version #5, which will not take into account any changes done afterwards.



In this example, restoring the version #3 voids prices in euros and dollars and the image for the attribute “picture”.

Restoring a version does not delete information, but generates a new version representing the restored version.



In this example, the created version contains all changes generated by the restored Version #3, in this case: this will cancel the price and the picture changes.

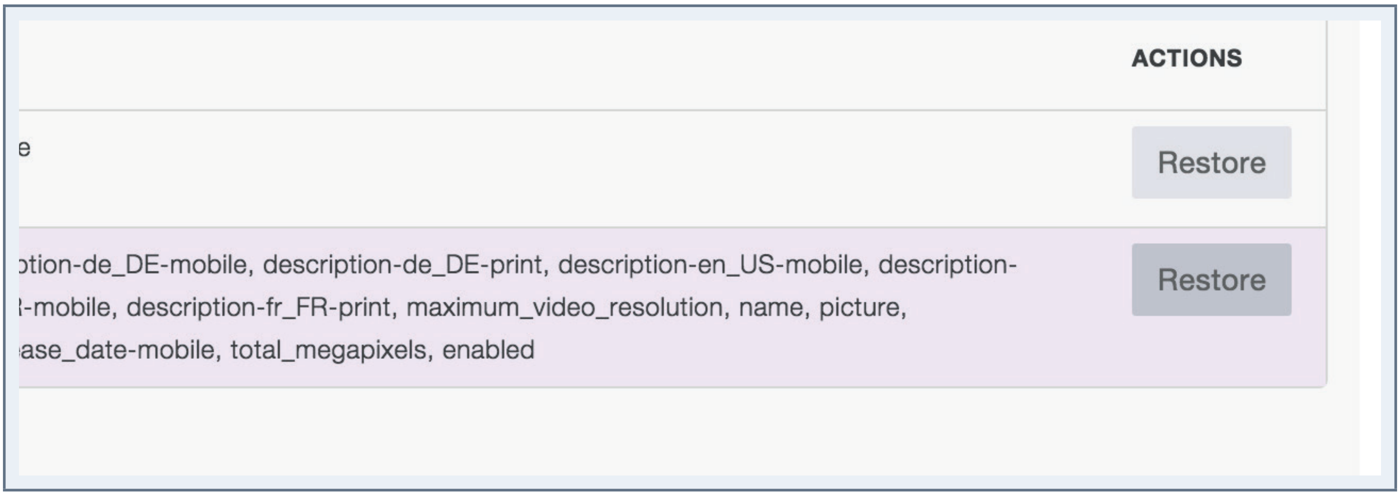
It is possible to add weight to the product, save the change and publish it. Thus the published product form has not been changed, only the weight has been added.

To go back to the current version that is currently enriched (include the price and the picture), simply restore the version that contains the changes.

Restoring a version

To restore a version:

1. Go to Enrich > Products.
2. Click on the product to restore.
3. Go to the “History” tab.
4. Click on the “Restore” button to restore the version



Then the version is restored.

Note

Your Administrator may use the purge of entities, in this case you will only see the first and last version of your product.

WORKING WITH VARIANT GROUPS

If you are not familiar with Variant groups, see the «Glossary» section.

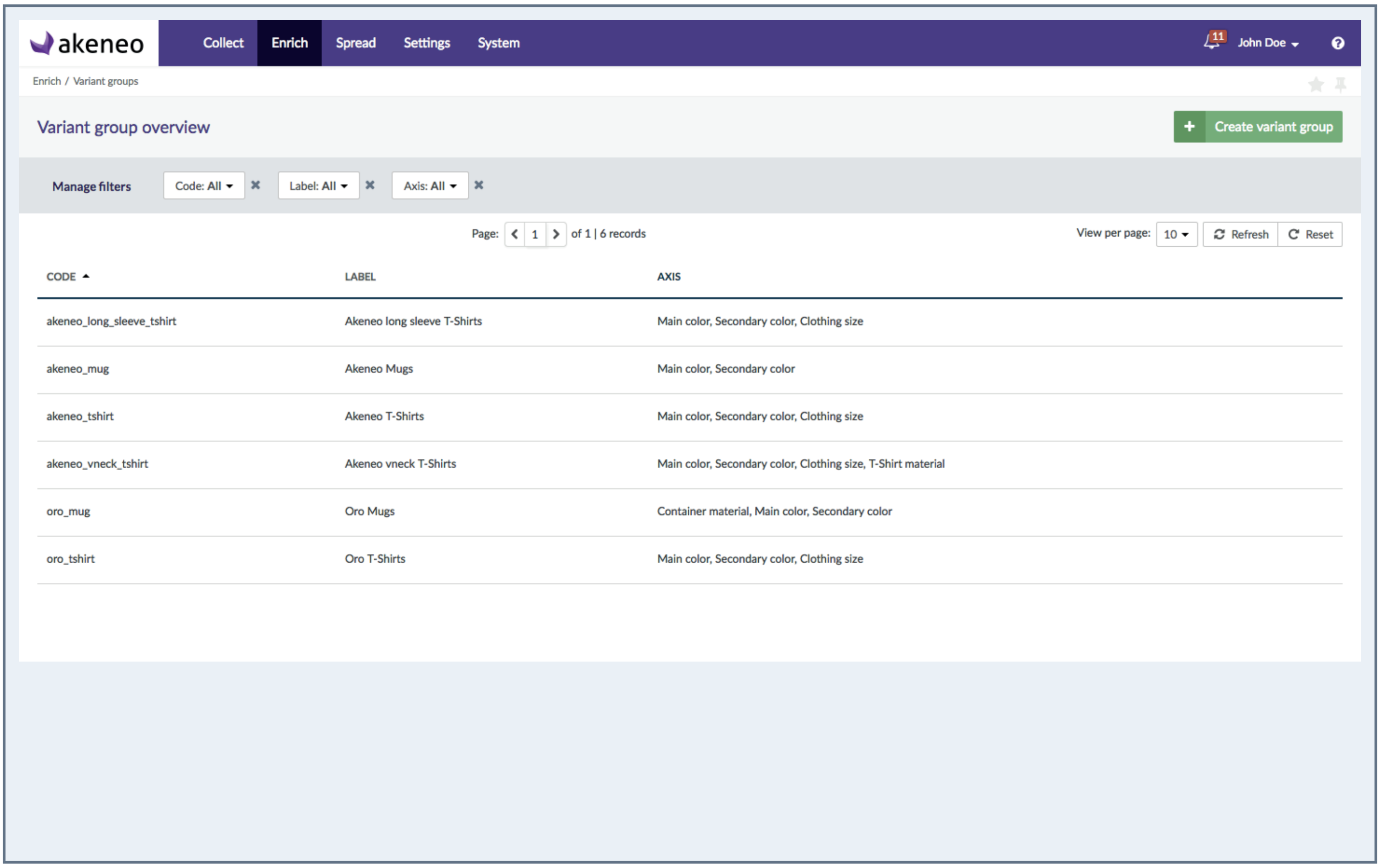
A product can be attached to one or no variant group.

This type of relationship has no direction: Product A <-> Product B <-> Product C, all three are part of the variant group G.

This type of relationship can define for example variations of relationships for a product reference: Iphone memory capacities and colors: white Iphone 8GB, 16GB, 32GB, and black Iphone 8 GB, 16 GB, 32 GB variants:

Using the grid of the variant groups

To start, go to Enrich > Variant Groups. The variant group grid works exactly the same as the product grid in terms of navigation and filters.



Filters can be applied on the following variant groups information:

Product information managed by the PIM:

- Code,
- Label,
- Axis of variation.

Sort out variant groups

Like on the product grid, clicking on the header of a column allows you to sort out variant groups, you cannot order variant groups based on their variation axis though.

The variant groups shortcut actions

Several actions are available on each variant group, they are visible at the end of the variant group line. The buttons are displayed when hover the line with your mouse cursor.

Note

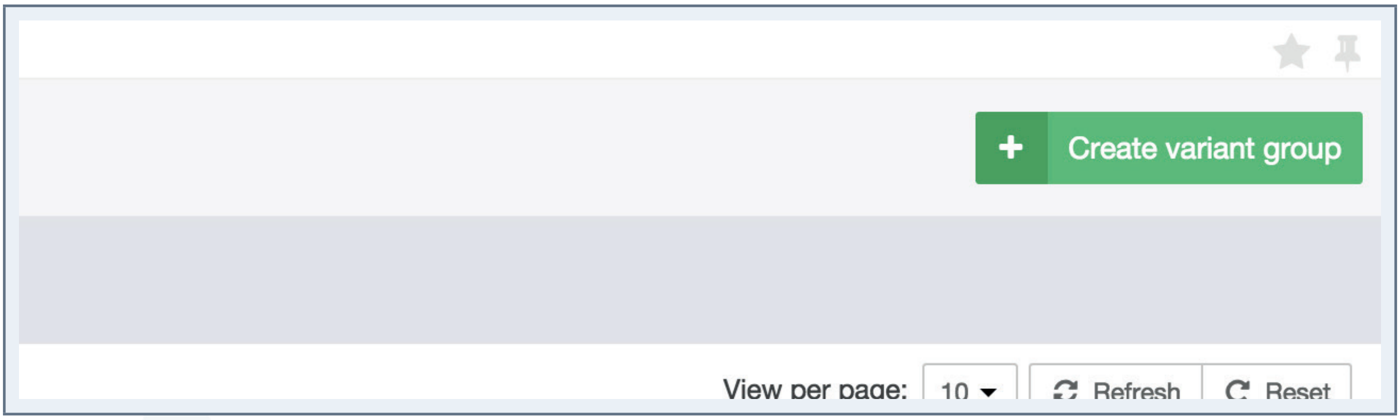
The shortcut actions are displayed if you have the rights, or depending if you are using the Enterprise or Community Version.

Creating a variant group

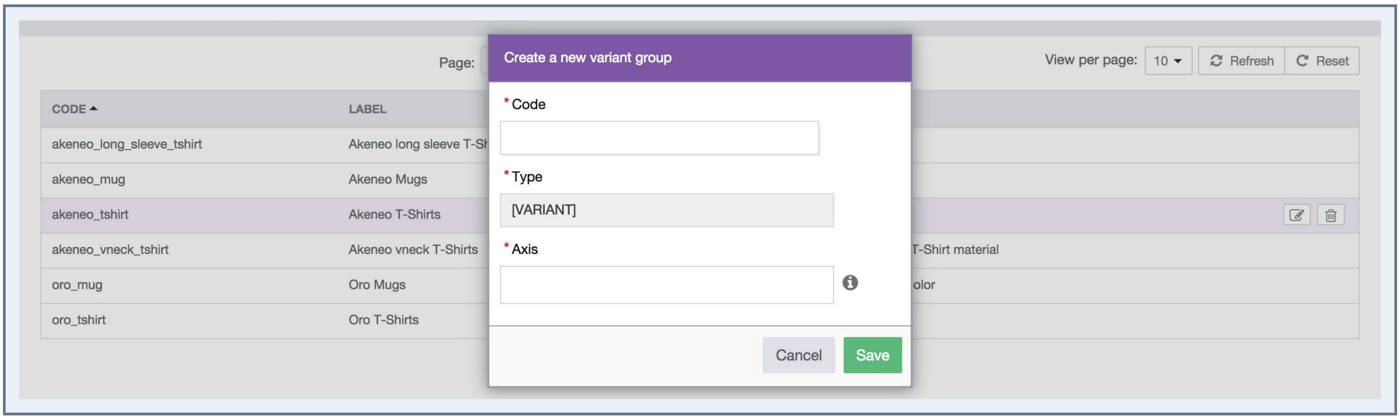
You must have a specific permission to create a variant group from the PIM user interface (without going through imports). if this is not the case, get in touch with your administrator.

To create a variant group:

1. Click on the top right of the page Enrich > Variant groups.



2. Enter a new variant group code (this information must be unique) and choose one or more variation axes. The field Type is automatically filled in and cannot be changed.



3. Click on «Save».

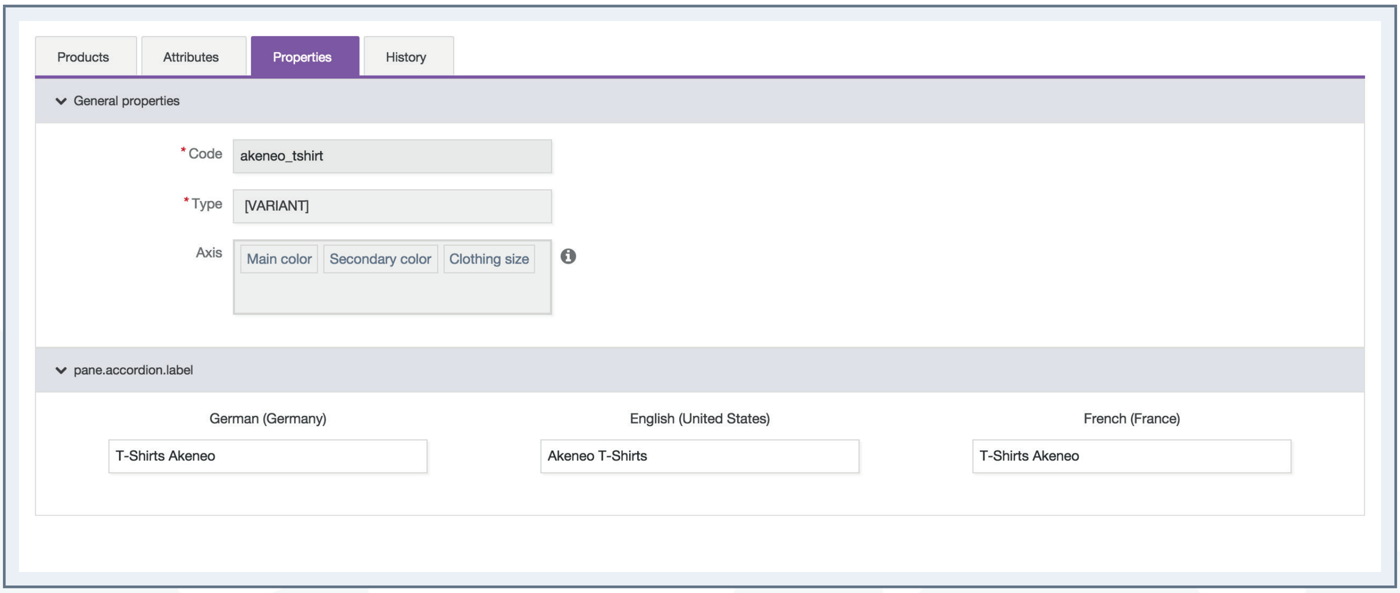
The variant group is created and the Variant Group Edit Form appears.

Note

Only simple select attribute type not localizable nor scopable can be used as variation axes.
There is no limitation on the number of variation axes for a variant group: you can have as many variation axes as needed.

Editing a variant group

Click on the variant group line you want to edit.



Several tabs are displayed:

- Products: this page allows you to add/remove products from your variant group, see the «Managing Products in a variant group» section
- Attributes: to add/remove attributes for the variant group
- Properties: to change the labels of your variant group (other information like the code, type and variation axes are not editable afterwards)
- History: to check your variant group's history, see the «Checking versions of a variant group» section
- Change or complete the information and click on "Save". The variant group is updated with your changes, and a new variant group version is created.

Viewing / changing a variant group label

Only the labels of a variant group are editable:

1. Click on the "Properties" tab.
2. Make your changes on the variant group's labels.
3. Click on the «Save» button.

The variant group is updated and a new variant group version is created.

Adding and removing variant group attributes

If you have the appropriate permissions, you can add attributes to a variant group.

Note

Any existing attributes in the PIM can be added to a variant group exception made of:

- Attributes that are used as variation axes for the group
- The attributes having the property of having unique values (SKU for example)

Since the publishing of the product group:

Click the "Add Attributes" in the top right of the tab "Attributes" button.

1. Select the attributes to be added by clicking on their labels
    - You can search an attribute by label using the Quick Search field at the top of the list.
2. Click the "Add" button below the list.

The attributes are added to the variant group currently edited.

Note

If you do not see the button “Add Attributes”, you may not have the appropriate rights to add attributes. In this case, get in touch with your administrator.

These attributes can be removed from the current variant group by clicking on the cross icon on the right of each new attribute added.

Note

If you do not see the cross icon on the attributes added, you may not have the appropriate rights to remove attributes of a variant group. In this case, please contact your administrator.

Managing products in a variant group

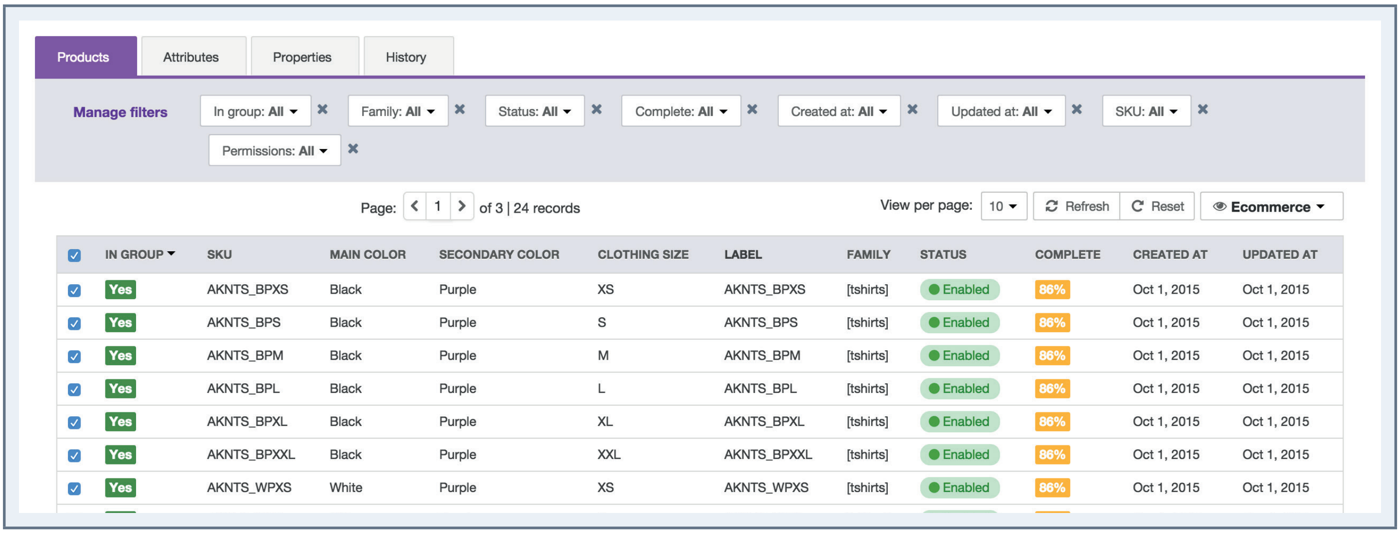
How to manage bundle products in a variant group?

1. Open via the product edit form of the selected product.
2. Click on the “Products” tab.
3. Tick the products in the grid.
4. Uncheck the products you do not want to associate in the current variant group.
5. Click on the “Save” button.

The product grid is displayed: the products associated to the variant group are displayed first. They can be easily identified by the information “Yes” in green in the second column of the grid. Note that the boxes are also checked:

Note

To prevent any data inconsistency, it is not possible to restore a version of a product belonging to a variant group.



Checking versions of a variant group

The record of changes applied to a variant group is taking into account the following actions:

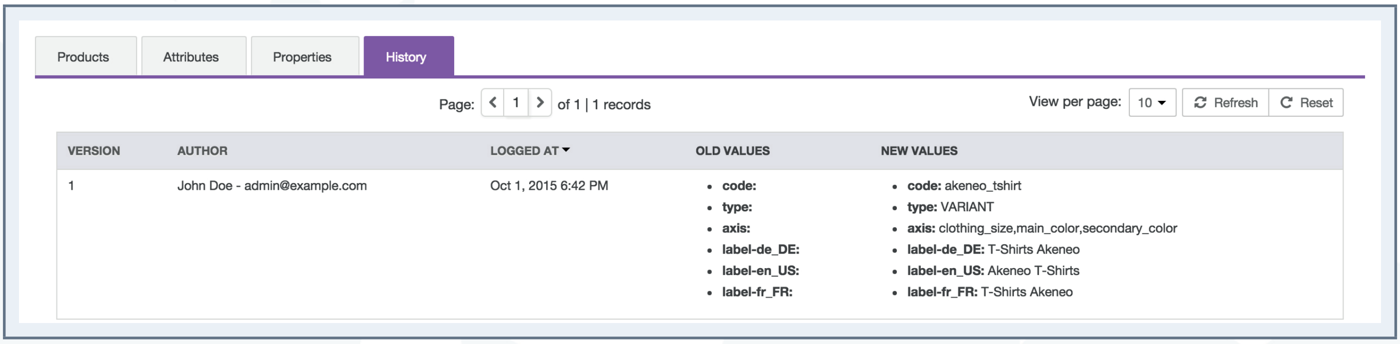
- Change on attribute values in the variant group edit form.
- Changes on properties.

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

- The person or the system (through an import for instance) that generated the changes.
- The date and time at which the changes have been applied.
- The old and the new value for each change.

To view the variant group versions:

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



Deleting a variant group

Variant groups can be deleted from the PIM. This means that all the product information related to the product will be deleted in the PIM. Note this action cannot be reverted.

To remove a product group, there are two ways of proceeding:

- Through the edition form of the group:
    1. Open the variant group edit form to delete.
    2. Click on the "Delete" button in the header of the page.
    3. Confirm the action in the popin.
- Through the shortcut in the grid:
    1. Select the group to remove in the variant group grid.
    2. Drag your mouse cursor over the variant group line in the grid, the delete button is displayed (trash can icon).
    3. Click on the "Delete" button.
    4. Confirm the action in the popin.

The variant group and all its information details are deleted in the Akeneo PIM. It's not possible to revert this action.

Note

The products that are associated to the variant group are not deleted. They can be allocalised to another variant group.

MASS ACTIONS ON SEVERAL PRODUCTS

Bulk operations enable you to perform actions on multiple products at once. These operations are performed on a selection of products from the datagrid. Below, you can find the list of the bulk operations available in the PIM:

- Product status change (enabled / disabled):
  Set the status for several products simultaneously. Eg: Enable all products of the tree “Catalog for Sales Week 16”

- Edit attributes:
  Apply a set of values for attributes to a selection of products. Eg: Set the same value “Poppy” for the attribute “Theme” to a whole set of products.

- Classify products in categories:
  Classify multiple products in one or more categories at once. Eg: Put all the products of the category “Catalogue Reference > Booklets” also in the categories “Website > Women > Accessories” and “Website > Lifestyle > Office Stationery”.

- Move products from categories

- Move multiple products from one or more categories at once. Eg: Merge products of the “Catalogue Reference > TV” and “Catalogue Reference > Projector” in a new category «TV and Projector».

- Remove products from categories

- Remove multiple products from one or more categories at once. Eg: Remove the products from “Catalogue Reference > Christmas” as the event is finished.

- Change the product family:
  Set a same family for several products. Eg: Apply the “Jewelry” family to all products in the “Bracelets”, “Necklaces”, and “Rings” categories

- Add to a group:
  Allow to bring together a selection of products in one or more groups (groups that are not tagged as Variant group). Eg: bring together the relevant products in the group “Harry Potter”.

- Associate to a variant group:
  Allow to bring together a selection of products in a variant group. Eg: bring together the products in the group “T-shirt Akeneo”.

- Publish products:
  Allow to publish the selection of products.

- Unpublish products:
  Allow to unpublish the selection of products.

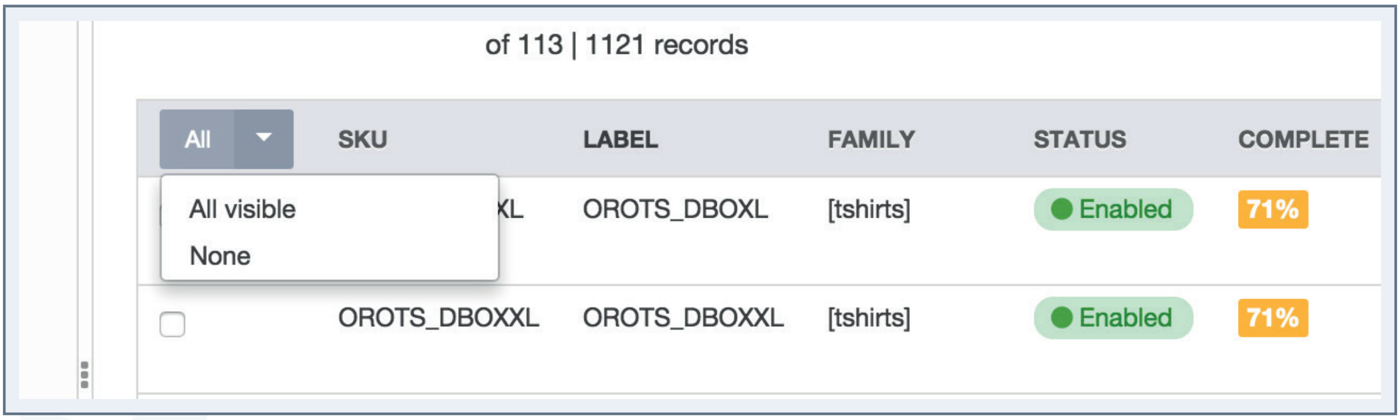
Note

In order to perform a bulk operation on products, you need the rights to each possible action, and also the general permission to perform bulk actions on products.

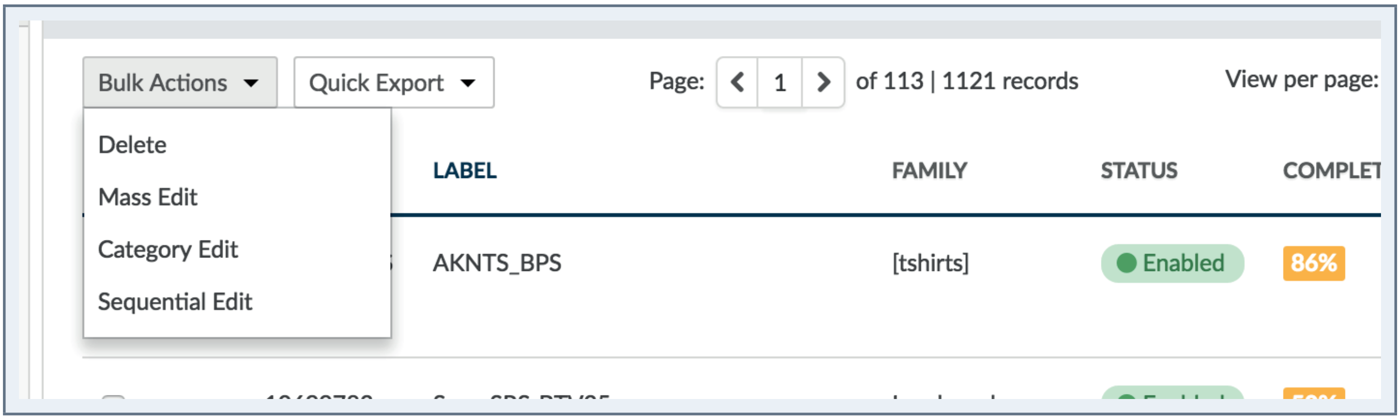
Carry out a mass edit on products

1. Search for products in the datagrid with the appropriate filters.

2. Select the products on which you want to perform the operation via the selection tool: all the products recorded, all visible products from the ongoing page, none of the products and the products for which you have selected on the 1st column.



3. Click on the “Mass Edit” button.

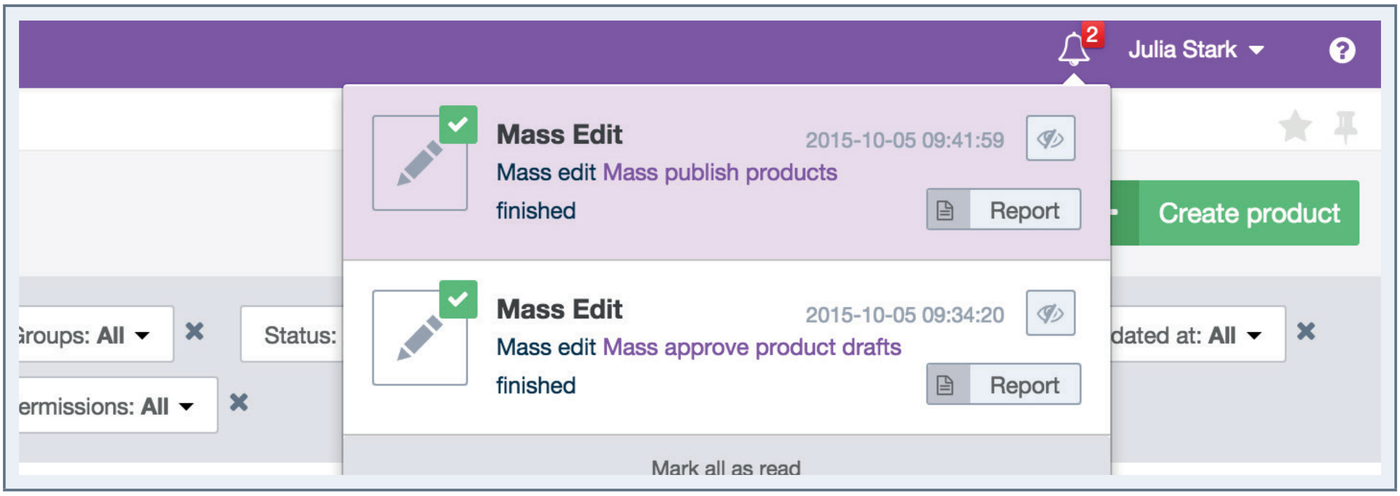


4. Select the operation to be performed from the screen menu.
5. According to the selected operation, the next page of configuration changes.

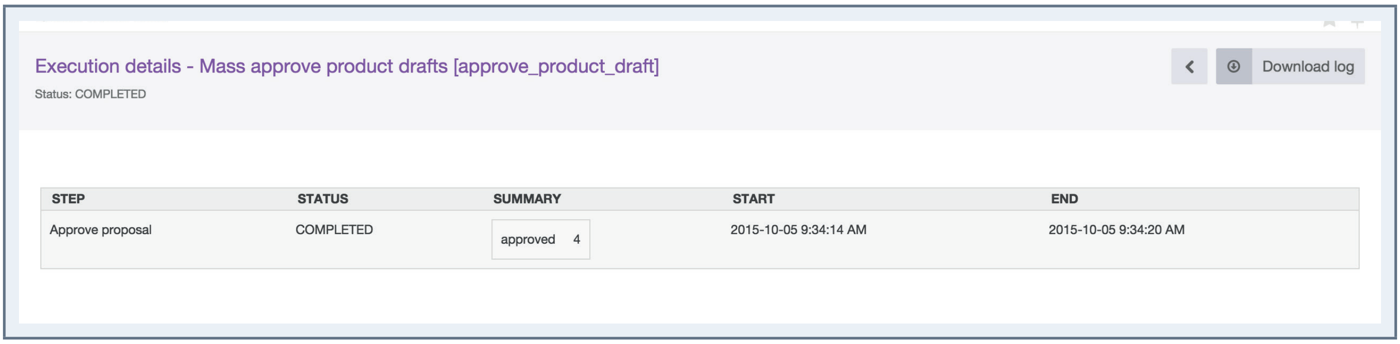
Operation	Step of configuration
Status change	Select the status to be applied.
Edit common attributes	Add attributes to the product form to set the values to be applied. The edit is done for the scope and the locale chosen in the products grid.
Classify products in categories Move products from categories Remove products from categories	Check the categories in which the products will be classified.
Change the product family	Select the family to be applied on products.
Add to a group	Check the groups in which the products will be brought together.
Add to a variant group	Select the variant group in which the products will be gathered.
Publish products	Confirm the action.
Unpublish products	Confirm the action.

6. Confirm the action via the popin message.

The action is processed to the back-end, so that you can continue to work on the PIM. When the process is done, you are the only user to be notified.

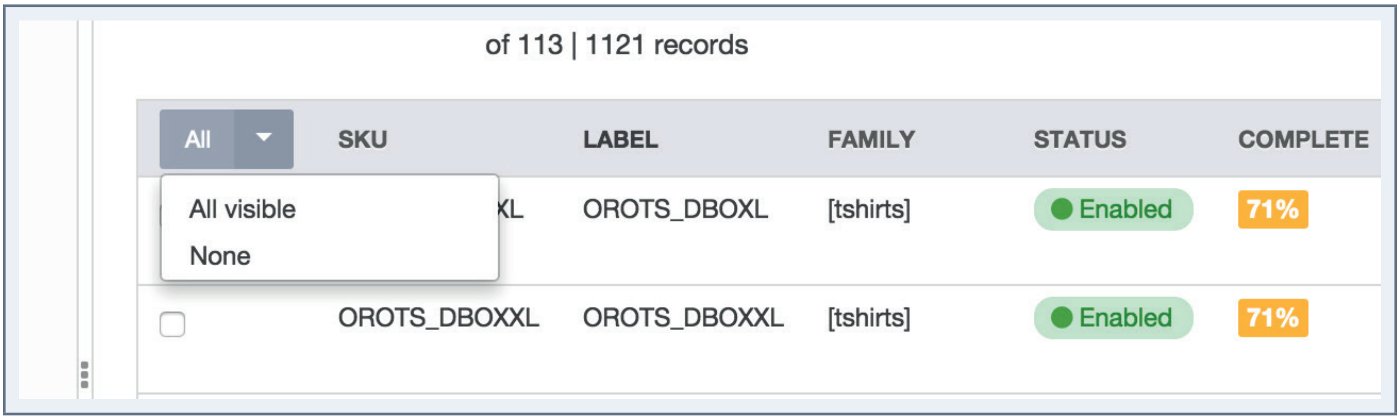


When you click on the notification, you access the report page of the action.



Delete multiple products

1. Search for products in the datagrid with the appropriate filters.
2. Select the products to be removed via the selection tool: all the products recorded, all visible products from the ongoing page, none of the products and the products for which you have ticked the 1st column



3. Click on the “Delete” button.

4. Confirm the action in the confirmation popin.

Sequential edit products

Sequential edit products enable to display one after the other the product forms from a selection of products, without going through the product grid. This will save time allowing the navigation directly between the product forms of the selected products.

Note

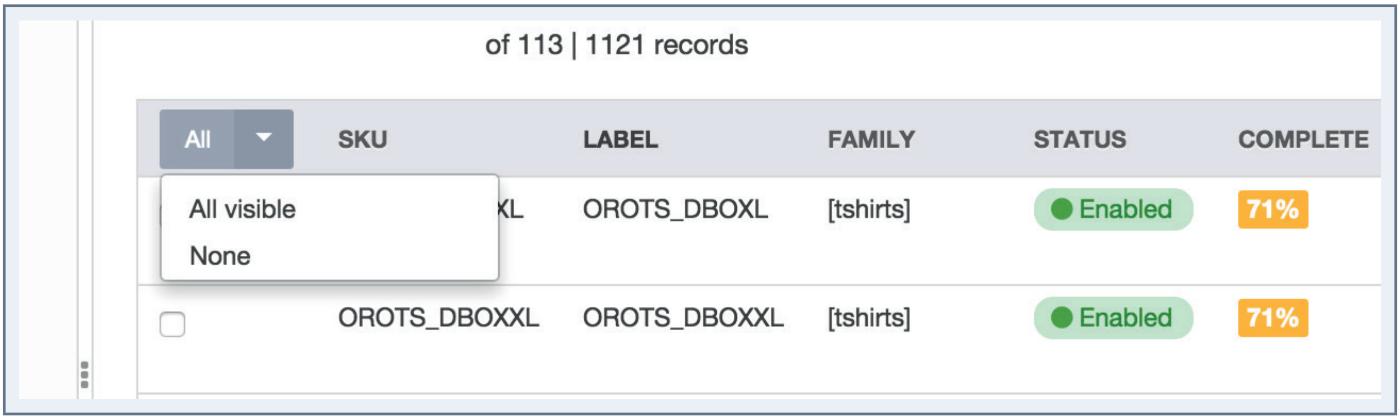
Any user with product access with edit permissions can run a sequential edit. There is no specific right to provide access to this feature.

Enterprise Edition Note

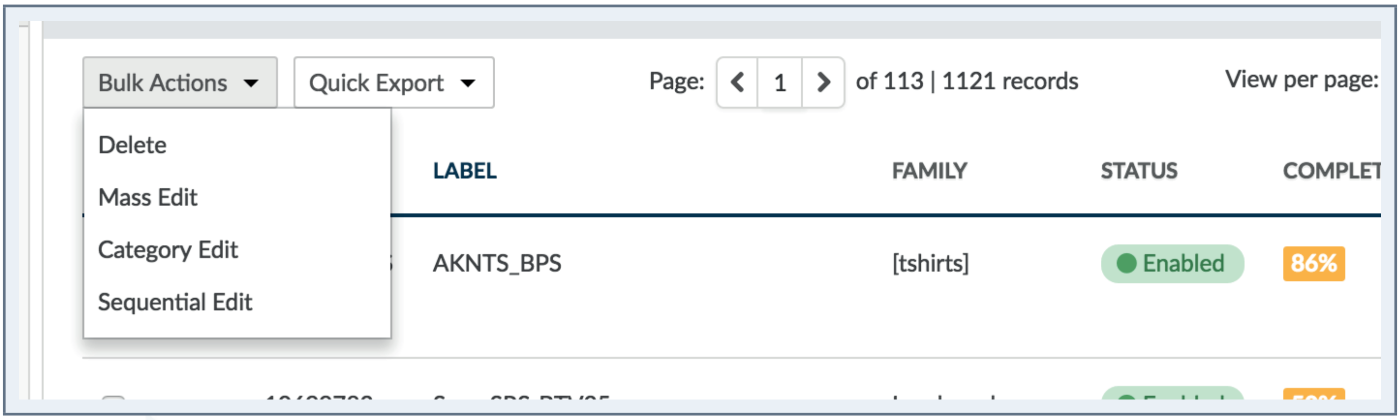
If the user cannot edit any products from his product selection, then an error message is prompted to inform he cannot do the sequential edit.

To start the product sequential edit:

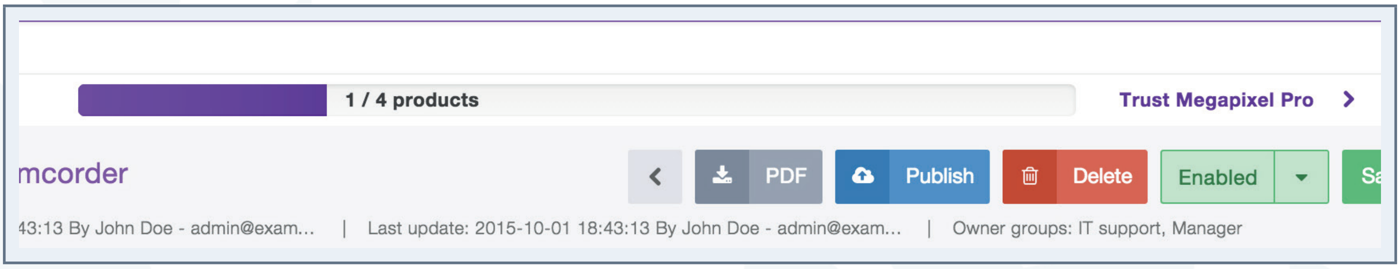
1. Search for products in the datagrid with the appropriate filters.
2. Select the products on which you want to perform the operation via the selection tool: all the products recorded, all visible products from the ongoing page, none of the products and the products for which you have ticked the 1st column.



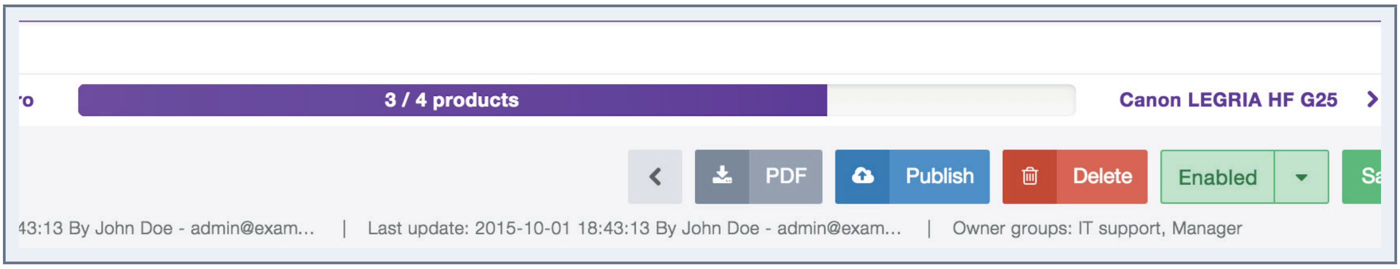
3. Click on the “Sequential edit” button above the grid.



4. The product edit page of the first product of the selection is prompted with a progress bar at the top of the page.



The progress bar tracks down the number of products that have already been changed from the total number of products of selected products. The progress bar is surrounded by two links on the left and right side.



The left link allows you to go back to the previous product, the right link to switch to the next one.

Enterprise Edition note

If the user can edit at least one product from his selection, it means that the sequential edition has started. Only the products with the read-only access rights will be displayed.

Generate a CSV or a XLSX file of the product information from the datagrid

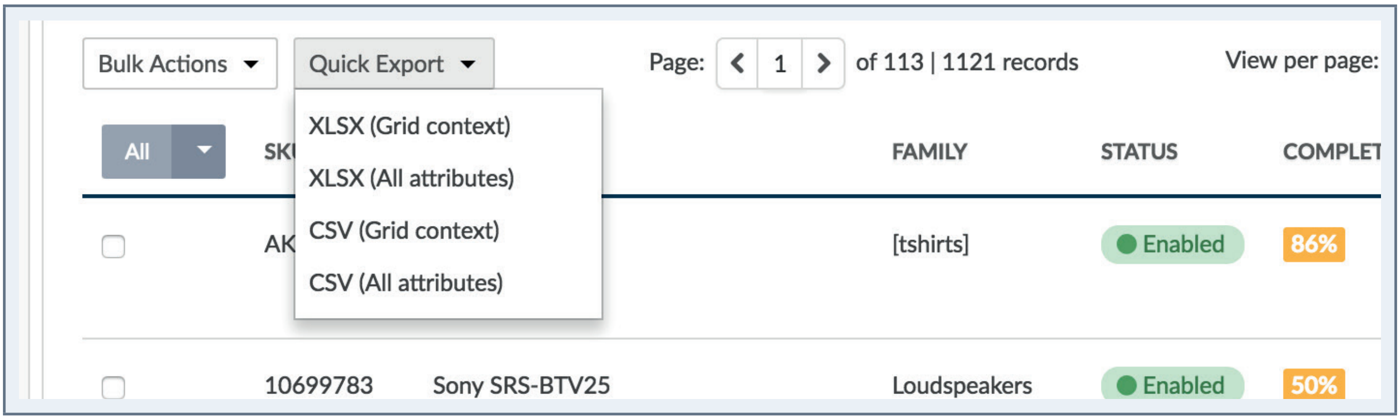
Akeneo PIM allows you to export your search result or a selection of products from the PIM datagrid to a CSV file or a XLSX file. This can be used to retrieve structured product information and thus create your own reports, graphics, etc.

To start the export of product information from the datagrid:

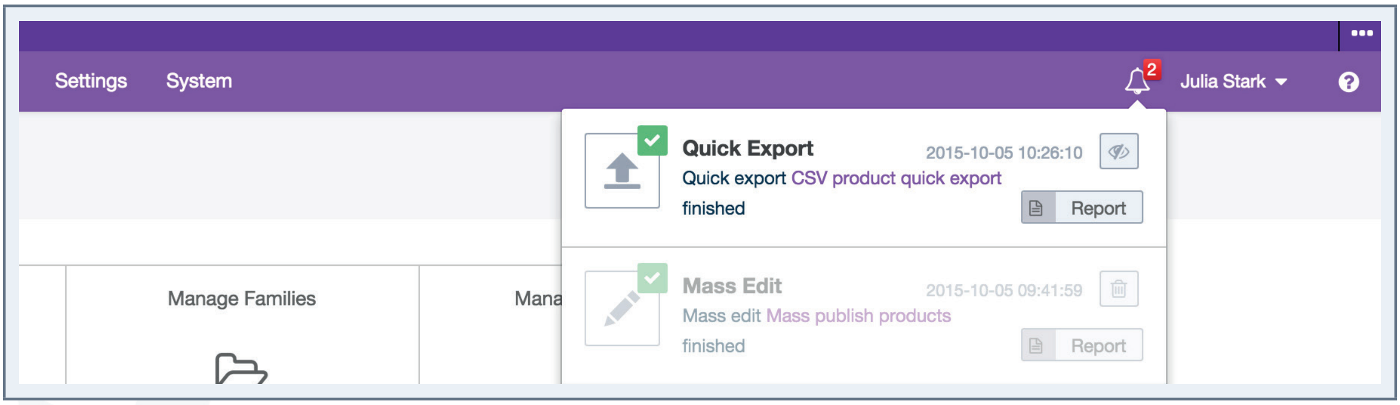
1. Search for products in the datagrid with the appropriate filters.
2. Select the products on which you want to perform the operation via the selection tool: all the products recorded, all visible products from the ongoing page, none of the products and the products for which you have ticked the 1st column.

3. Click on the “Quick Export” button above the grid, and select

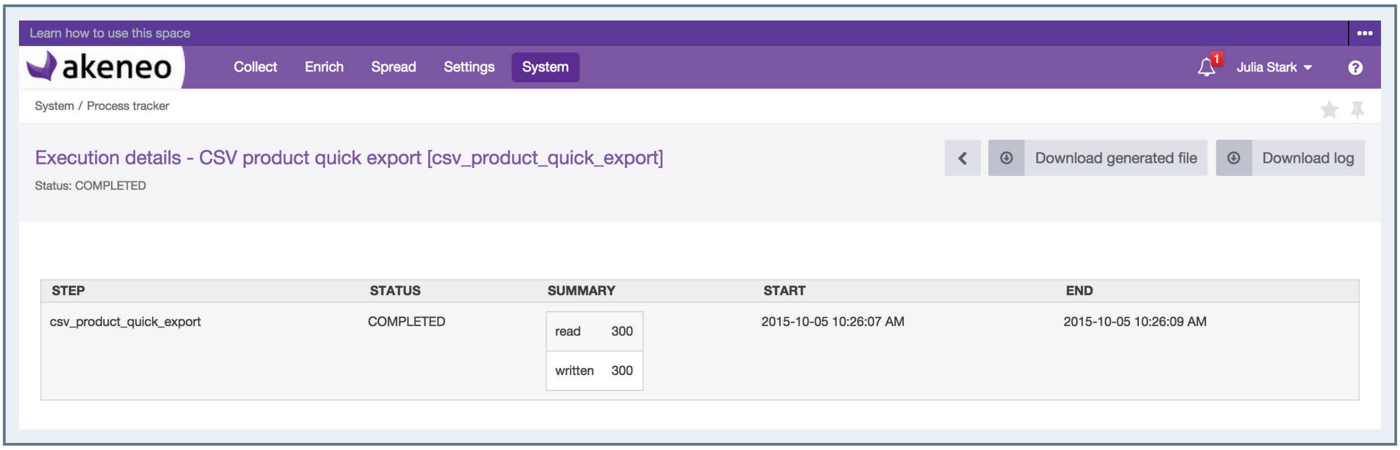
4. the "CSV (all attributes)" option to generate a CSV file with all attributes
5. or select "Excel (all attributes)" option to generate a XLSX file with all attributes
6. or select the «CSV (Grid Context)» option to generate a CSV file according to your current view
7. or select the Excel (Grid Context)» option to generate a XLSX file according to your current view



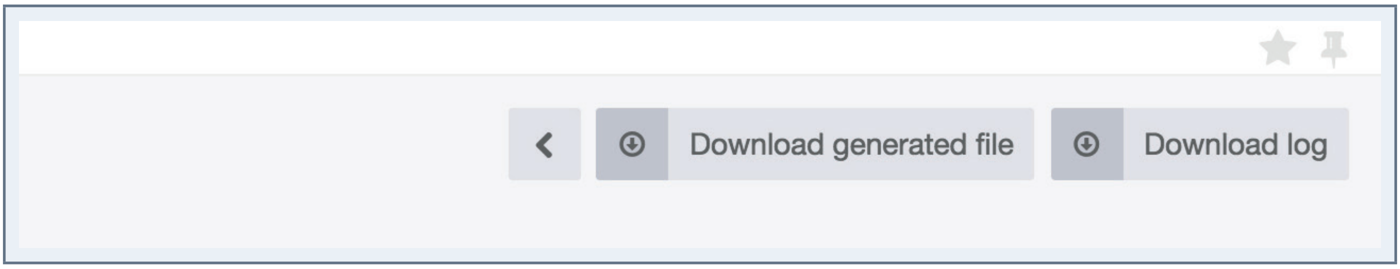
The action is processed as a backend task, so that you can continue to work on the PIM. When the process is done, you are the only user to be notified.



When you click on the notification, you access the report page of the action.

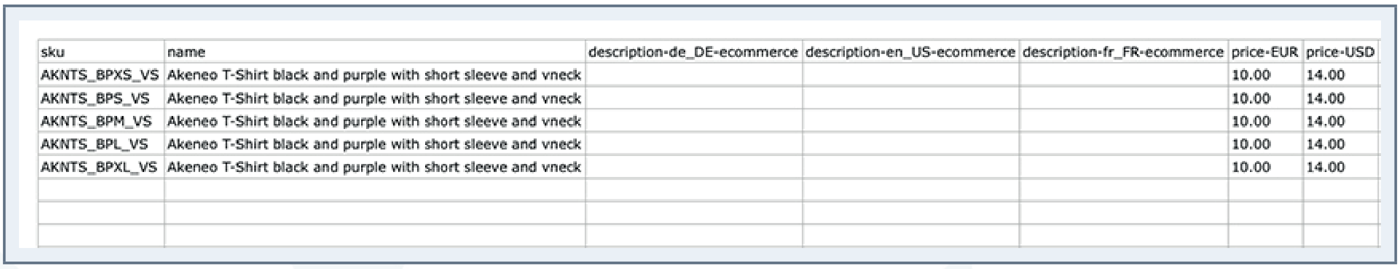


On the report page, you can download the generated file.



A file named Products_export_<Working Locale Code>_<Working channel Code>_Date_Heure.csv or Products_export_<Working Locale Code>_<Working channel Code>_Date_Heure.xlsx will be created.

The created file encloses one line per product exported, and a column for each product information available. The format of the generated file is the same as for the product import and export in CSV or XLSX format with the Akeneo connector. Only the working channel is taken into account, and thus all the locale information required for the channel is exported. The working locale is not taken into account.



sku	name	description-de_DE-ecommerce	description-en_US-ecommerce	description-fr_FR-ecommerce	price-EUR	price-USD
AKNTS_BPXS_VS	Akeneo T-Shirt black and purple with short sleeve and vneck				10.00	14.00
AKNTS_BPS_VS	Akeneo T-Shirt black and purple with short sleeve and vneck				10.00	14.00
AKNTS_BPM_VS	Akeneo T-Shirt black and purple with short sleeve and vneck				10.00	14.00
AKNTS_BPL_VS	Akeneo T-Shirt black and purple with short sleeve and vneck				10.00	14.00
AKNTS_BPXL_VS	Akeneo T-Shirt black and purple with short sleeve and vneck				10.00	14.00

For this export from the datagrid, the completeness, the product status, their classification are not taken into account to determine what information can be exported. All the products selected in the datagrid, regardless of their details, are exported to the CSV file or XLSX file.

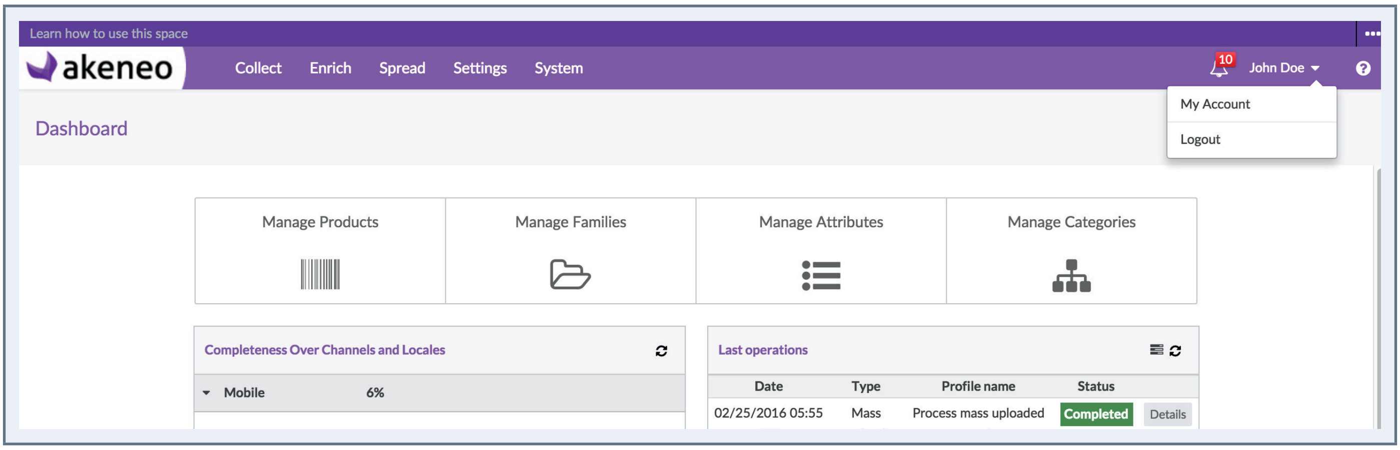
Enterprise Edition Note

The quick export takes into account the user permissions on locales and attributes groups:
- If a user has no view right on a locale, the localizable values for this locale are not exported.
- If a user has no view right on an attribute group, the attributes for this attribute group are not exported.

MANAGING YOUR USER ACCOUNT

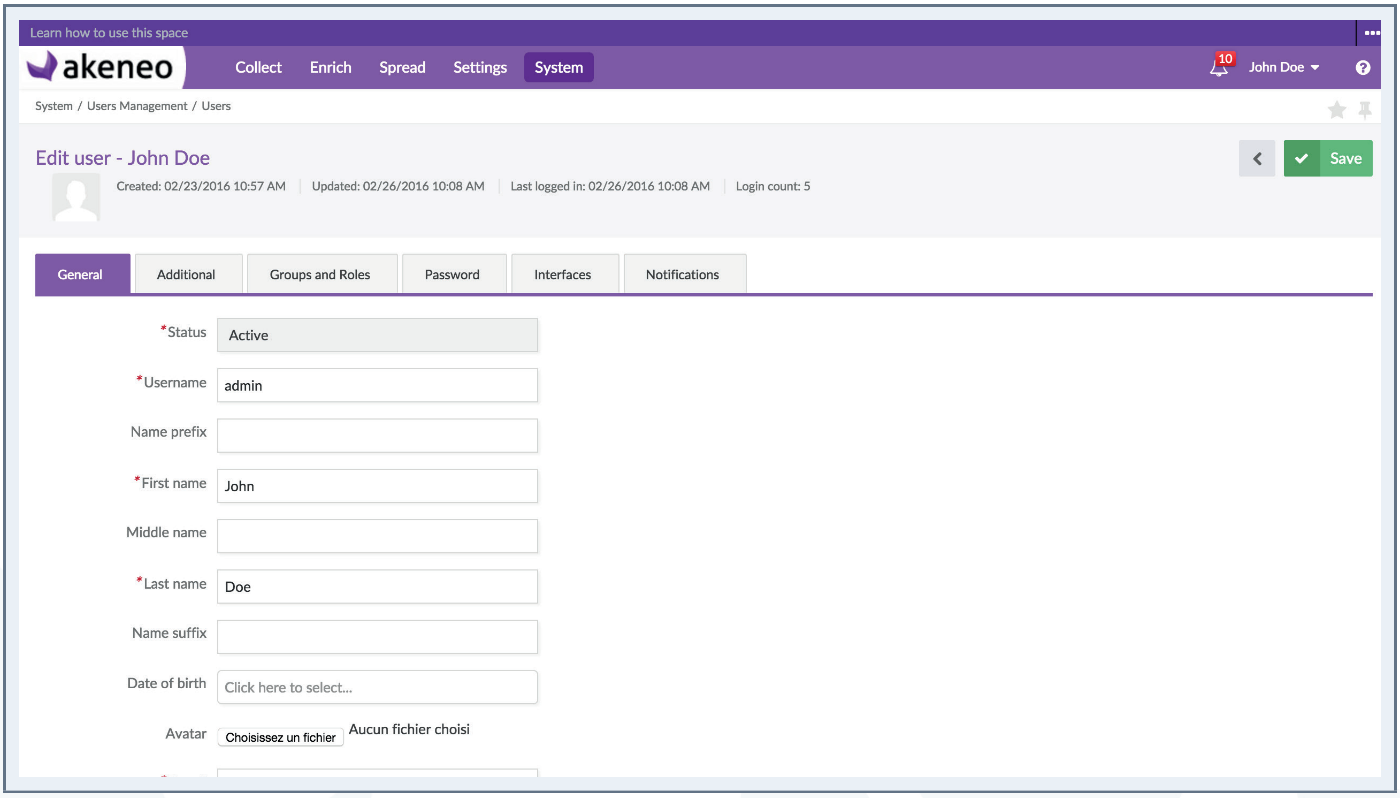
To manage your account:

1. Click on your user name at the top right and select “My account”. Your user account page is displayed.



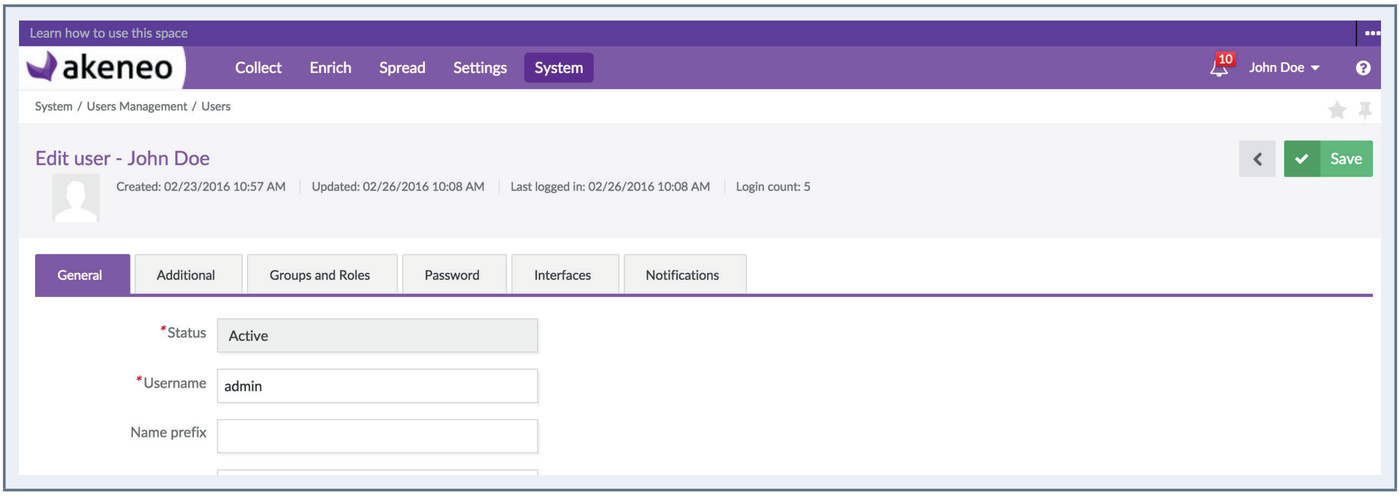
2. Click on the top right button “Edit”.

3. Your user account is in edit mode, you can update your information.



Edit your general information

1. In the “General tab”, edit the information you want to update.
2. Click on the ”Save” button to save your updates.

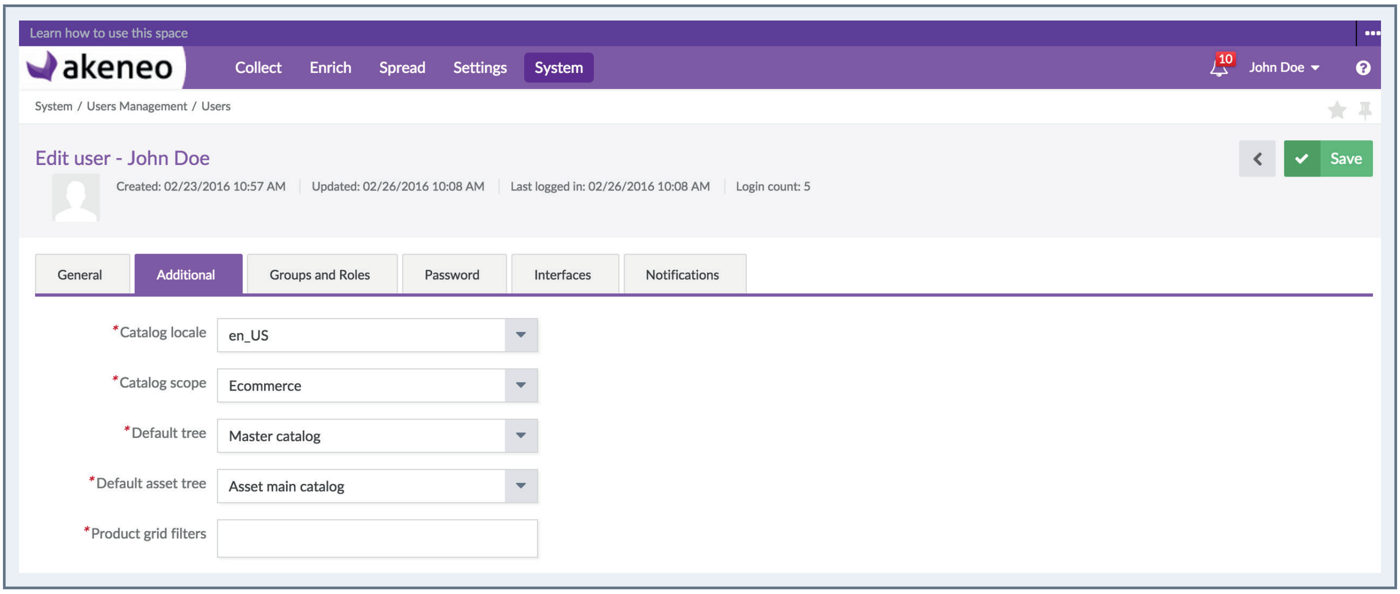


Note

The username, first name, last name and e-mail are mandatories.

Change your default preferences

1. Click on the “Additional” tab.
2. Edit the information you want to update:
   - The “catalog locale” is your default working locale for the catalog data
   - The “catalog scope” is your default working scope for the catalog data
   - The “default tree” is your default working tree for products
   - The “default asset tree” is your default working tree for assets
   - The “product grid filters” are your default filters used for the products grid and the published products grid (only in Enterprise Edition)
   - The “default product grid view” is your default view when you open the products grid.
   - The “default published product grid view” is your default view when you open the published products grid (only in Enterprise Edition)
3. Click on the ”Save” button to save your updates.



Notes

1 - If no default filter is defined, the system attributes are used as default filters in the product grids: family, groups, status, completeness, creation date, updated date, product identifier, permissions.

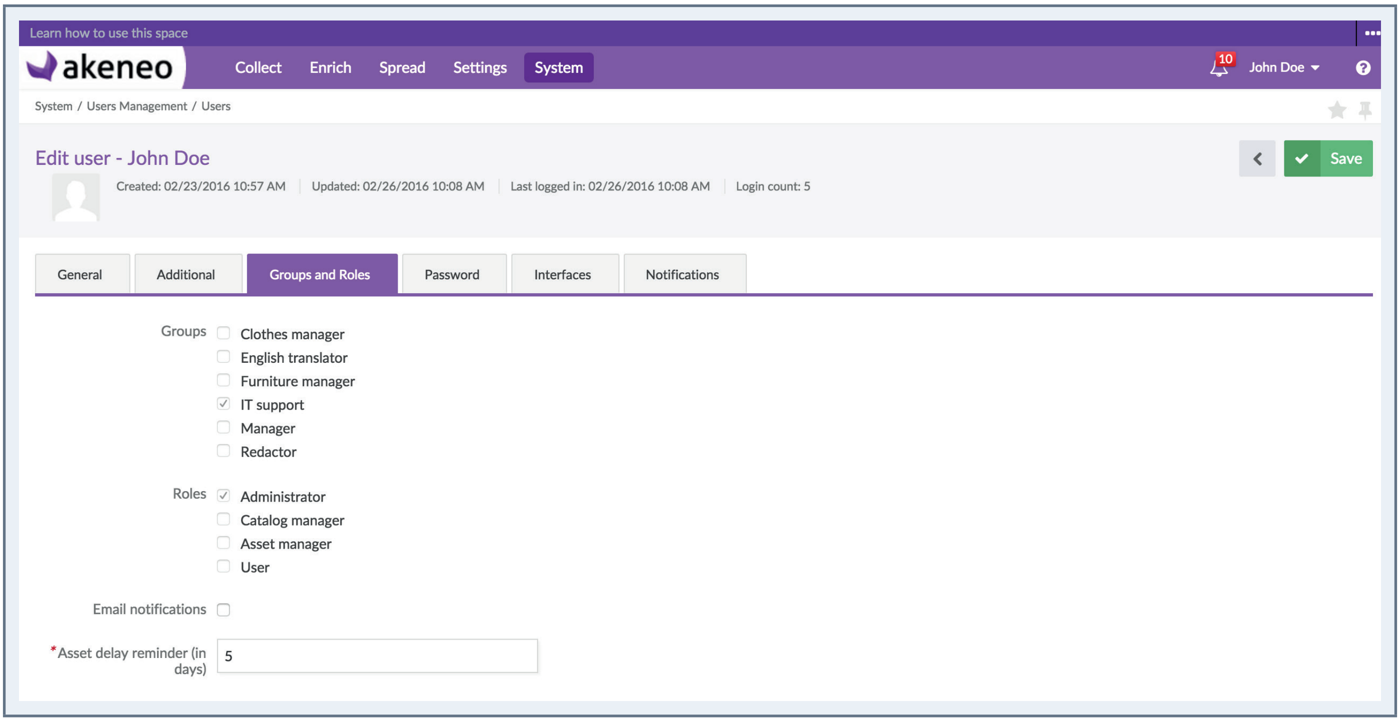
2 - In the lists "default product grid view" and "default published product grid view" (Enterprise Edition), only the grid views you have created in the grid are available.

3 - If "default product grid view" is not displayed, you haven't yet created a view in the products grid.

4 - Enterprise Edition: If "default published product grid view" is not displayed, you haven't yet created a view in the published products grid.

Edit your groups and roles information

1. Click on the "Groups and roles" tab.
2. Edit the information you want to update:
    - The "Groups" you are belonging to
    - The "Roles" you are belonging to
    - If you want to receive "email notifications"
    - The "asset delay reminder (in days)" to receive email notifications according to the end of use date of assets
3. Click on the "Save" button to save your updates.



Change your password

To change your password, refer to "Change your password" in First steps into Akeneo PIM.

Change your interface locale

Each user can define his user interface locale in his user account (parameter "UI locale").

Some language-related specificities are managed (dates, numbers and currencies formats). For example, the english decimal separator is a dot (.) and the french one is a comma (,).

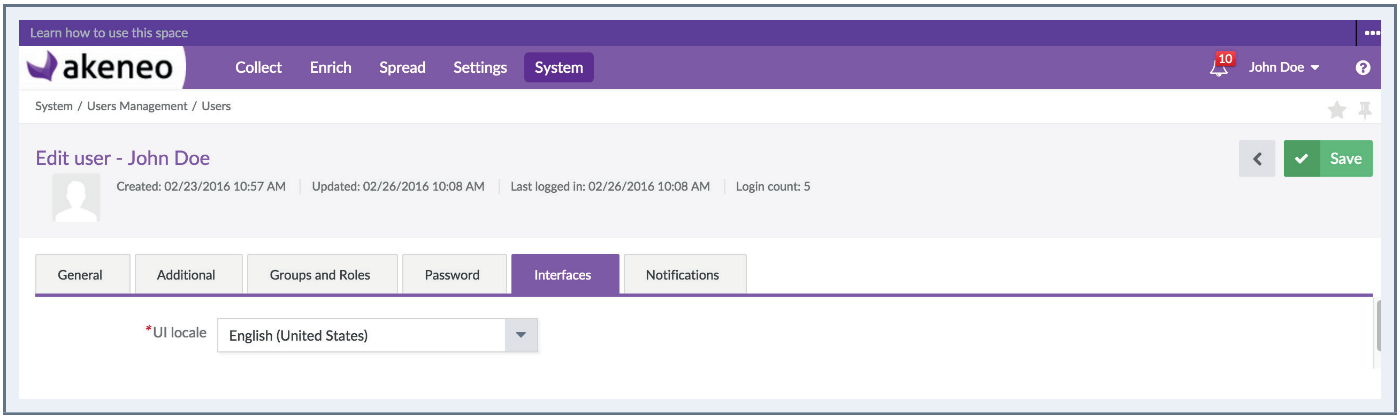
This UI locale is used for all the interfaces in Akeneo PIM (menus, screens labels, messages...) and for the formats to input and display dates, numbers and currencies. For examples:

User UI locale	Date format	Number format	Currency format
fr_FR	08/03/2016	12,5	90,50 $US
de_DE	08.03.16	12,5	90,50 $
en_US	03/08/2016	12.5	$90.50

The UI locale is complementary of the default catalog locale (in the “Additional tab”) for the catalog data (attributes labels and values, categories labels, families labels...).

To change your UI locale:

1. Click on the “Interfaces” tab.
2. Edit your UI locale.
3. Click on the ”Save” button.



Note

The locales in the list are all the locales installed for your Akeneo PIM. If your locale is not available, please contact your administrator.

Change your notifications preferences (EE)

1. Click on the “Notifications” tab.
2. Edit the notifications you want to update:
   - Activate “When new proposal to review” when you want to receive notifications for each proposal sent to your review
   - Activate “When new proposal is approved or rejected” when you want to receive notifications if your proposal sent to your review has been approved or rejected.
3. Click on the ”Save” button to save your updates.

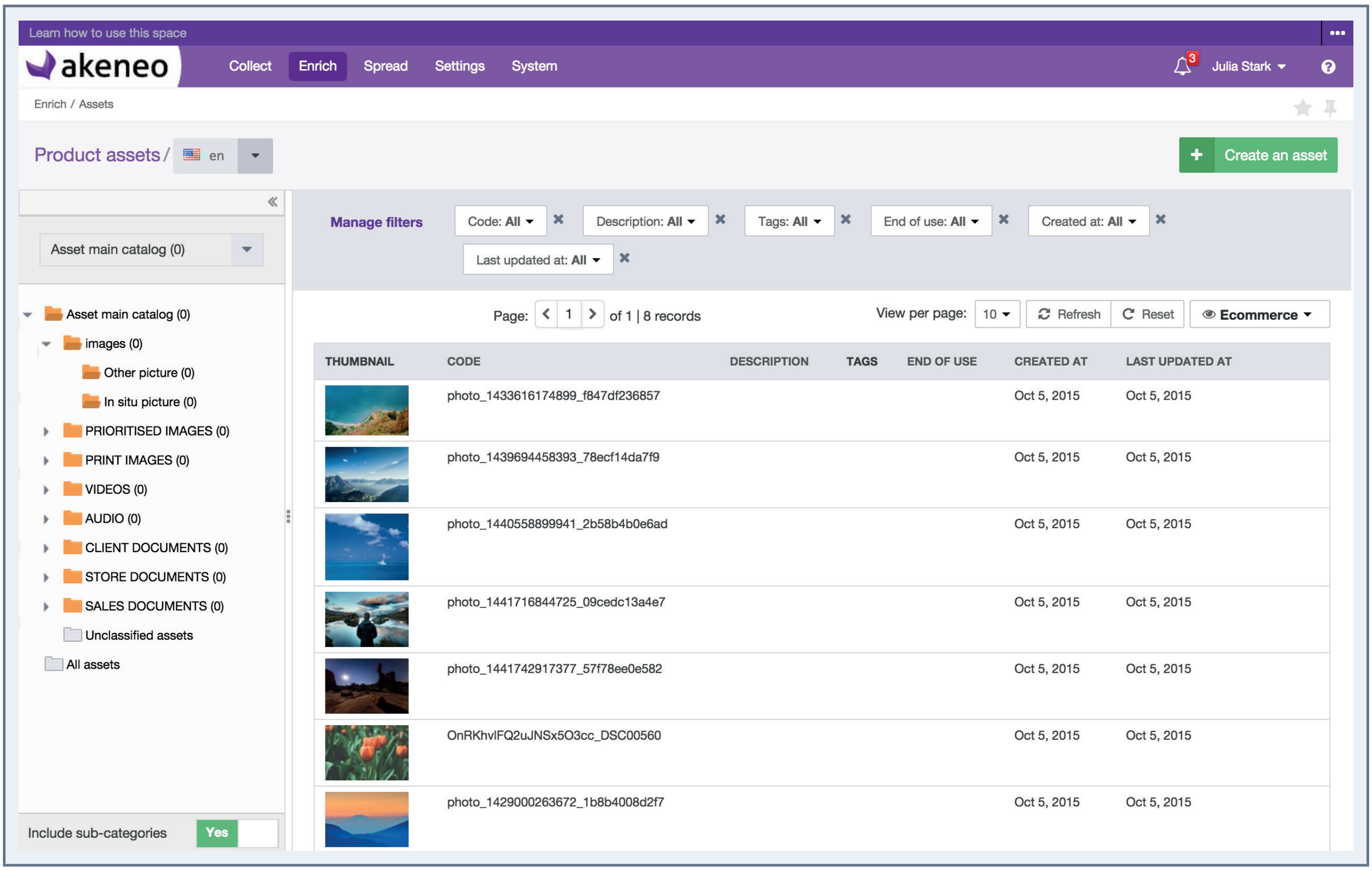
Notes

1 - The parameter “When new proposal to review” is displayed only if you are the owner of some products (if you have the permission “allow to own products” for at least one category).

2 - The parameter “When proposal is approved or rejected” is displayed only if you can enrich some products (if you have the permission “allowed to edit products” for at least one category.

USING THE ASSET GRID (EE)

To start, go to Enrich > Assets. From this page, there are many ways to work within the asset grid below.



Locale / Channel context

Setting the locale context

On the asset page, you are able to define your working locale. The locale selection impacts the following information on the page:

- The category labels
- The properties labels that can be used as filters
- The values in the asset grid

Hence the page will be updated when the working locale is changed.

> **Note**
>
> The working locale selected in the page of the asset grid is applied when editing or viewing an asset form.

> **Note**
>
> The working locale is very different from the interface locale of the user, refer to the section "Change your interface locale".

Setting the channel context

Above the asset grid, on the right side, you have a drop down menu to select your channel.

The selection of the working channel impacts the values in the asset grid to be displayed, especially in the case of different values according to which channel you are currently working. Selecting a channel will enable the value to be displayed. Therefore the asset grid is updated when the working channel changes.

> **Note**
>
> The available channels are those concerned with locale selected higher up on the page. If you don't find your channel, it means the locale selected is not required for the channel you want, so it is not proposed. To add a locale to a channel, refer to the "Manage channels" in the PIM Catalog Settings Guide.

Page numbering

The asset grid displays a page number: all the assets in the grid come per set of N assets. The number of assets is shown on the top right of the grid.

The number of assets per page can be changed via the drop down list to select and view more assets.

There are two navigation buttons allowing to go to the next / previous page in the asset grid. The current page number you are on is displayed in the middle. Eventually, it is possible to go directly to a specific page by modifying the field indicating the current page number.

Browsing the asset catalog by category

In the left panel of the asset grid, stands the asset trees for the categories. This panel allows you to browse the asset catalog.

Reduce the navigation panel per category

When there is a lot of information on the grid, it can be convenient to expand the screen over the full width of the page. Thus, it is possible to reduce the navigation panel by category. For this, click on the icon on the top right of the panel. The panel will be reduced automatically. To show the panel again, click on the icon on the top right of the panel. The panel will be displayed automatically.

Change the width of the navigation panel per category

When the category name is too long for a given locale, the name of the category may not be fully displayed in the navigation panel. It may be convenient in this case to expand the panel width in order to read the whole name. Changing the panel width may also be useful in the case of a very deep tree (with many subcategories) which, when unfolded, has not enough space to properly display all the subcategories. To change the width of the panel, you can keep the left click of your mouse on the banner on the right (shown with the 3 points) to change the width of the panel. When you are happy with the width you want, you can release the mouse button.

Note

There is a minimum width for the fixed panel. It cannot be reduced completely to the left.

View a category tree

A category tree is a set of categories interrelated and with the same root. There may be as many trees as needed in the PIM. For example, a business-driven tree is different from one oriented to a website. This will make easier the user navigation in the catalog as per his needs. To view a category tree, select the tree to be displayed in the dropdown list at the top of the navigation panel.

Note

If you do not have the rights to see a tree, it will not be part of the list in the drop down menu. In this case, please contact your administrator.

Include subcategories for the asset counter per category

To the right-hand side of each category label, there is a number into brackets which shows the number of products classified in categories.

There is an option available at the bottom of the navigation panel for categories.

This option takes into account the number of products classified in subcategories. By default, this option is “Yes”, hence subcategories are taken into account.

If you do not want to take into account the number of products classified in subcategories, click on "Yes" at the bottom of the navigation panel. The tree is updated with product numbers excluded subcategories.

Note
The number of assets in the category displays the assets on which you have rights to view. The other assets are not taken into account.

How to view assets according to their classification

The category panel enables to filter the asset grid according to their categorization. To do so, you need to click on the category you want to see the assets. The asset grid will be then updated.

Note
Only assets that you can view or edit are displayed in the grid, without applying any filters.

View assets which are not classified in a tree

A "category " as a filter is displayed for the whole tree. The "folder" icon is gray and on the bottom of the tree. This category named as "unclassified assets" is automatically managed by the PIM and cannot be set.

To see all the assets that are not classified in any category of the relevant tree, click on the "unclassified assets" category.

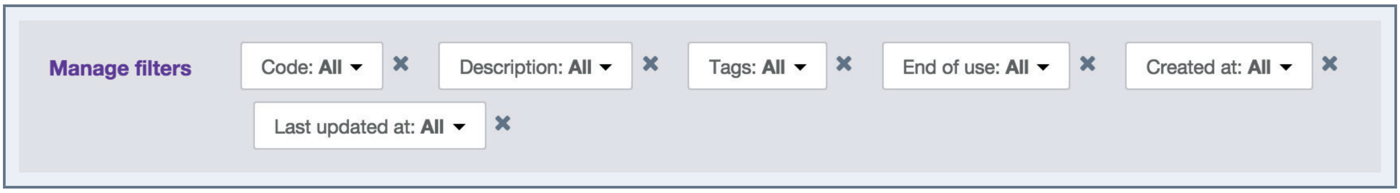
View all the assets of the catalog

A category is displayed even though there is no tree. The "folder" icon is gray, below the tree if there is one to be displayed. This category named "All Assets" is automatically managed by the PIM and cannot be set.

To view all the assets of the catalog, click on the category "All assets".

Filters

The asset grid includes a filter bar.



1. Enter your criteria. If the criteria shown are not relevant, you can add additional criteria: click on the "Manage filters" tab and select what you want to be added from the drop down list.
2. The grid is automatically updated when the user applies a new filter

The labels filters are localised: if an attribute has a label in the selected locale on the top of the page, then this label will be used. If there is no locale available, then the attribute code or the option will be displayed into brackets. For example: [DESCRIPTION].

The filters can be applied on the following asset information:

- All the asset information managed by the PIM:
    - Code
    - Description
    - Tags
    - End of use
    - Creation date
    - Last update date

Apply sort orders

To sort out the assets, you can click on the column header in the asset grid.

The following information cannot be sorted out:

1. Thumbnail
2. Tags

The shortcut actions on the asset

The shortcut actions for each asset

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

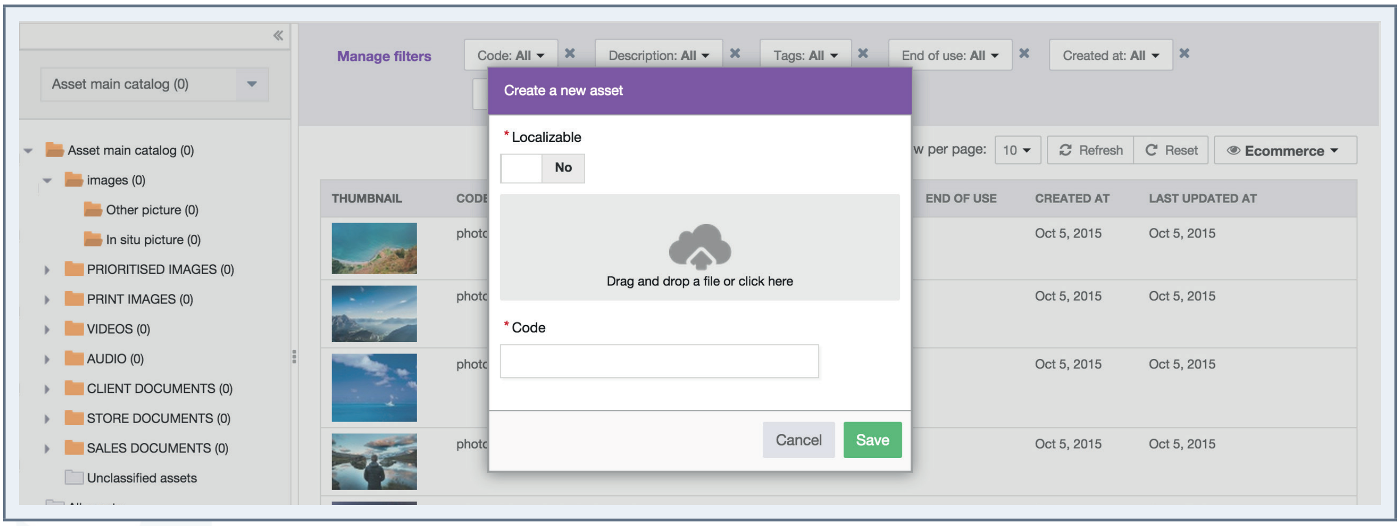
Create an asset

To create an asset from the PIM user interface (without going through imports), you must have a special permission to do so. If this is not the case, please contact your administrator.

To create an asset in the PIM:

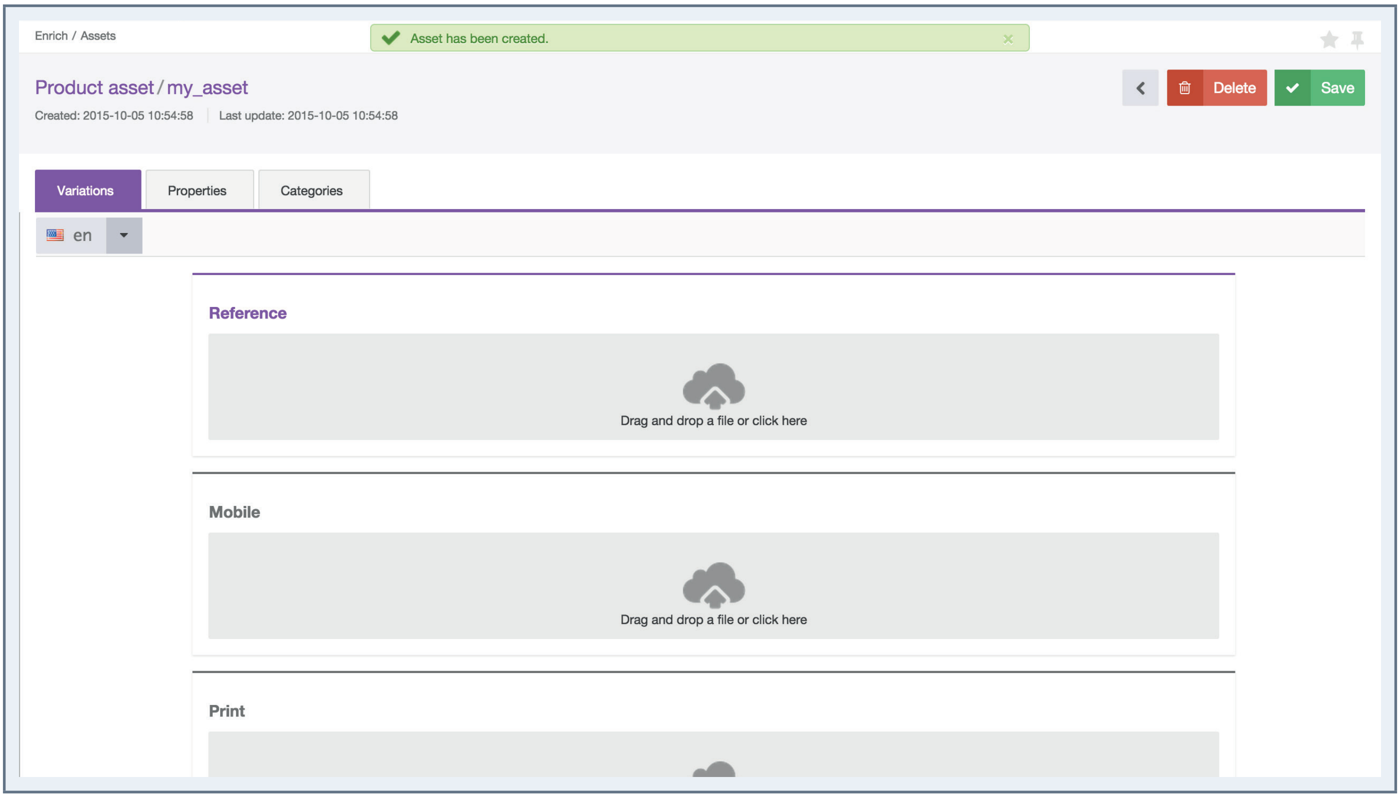
1. Click on the "Create asset" at the top right hand side of the page Enrich > Assets.

2. Select if the asset you want to create is localized or not. Note: If it will be localized, the area to upload a reference file is hidden. If not, you can upload a reference file.



3. If a file is uploaded as a reference file, a code is automatically generated based on the given filename. If not, the user has to put a code for the asset.
4. Click on the "Save" button.

The asset has been created and the asset form page is displayed.


Enrich / Assets
Asset has been created.
Product asset / my_asset
Created: 2015-10-05 10:54:58
Last update: 2015-10-05 10:54:58
Delete
Save
Variations
Properties
Categories
en
Reference
Drag and drop a file or click here
Mobile
Drag and drop a file or click here
Print

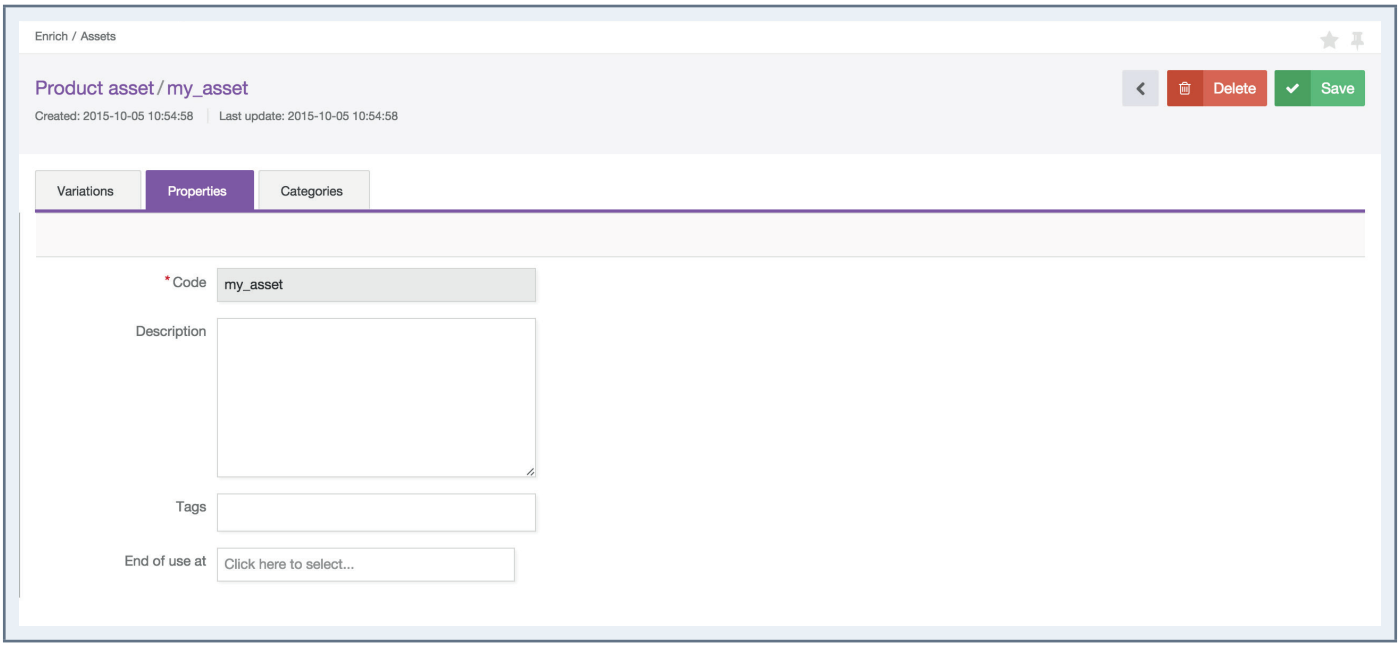
WORKING ON THE ASSETS

Edit an asset

To edit an asset, open the asset form by clicking the right row in the asset grid.

Edit the properties of an asset

1. Click on the “Properties” tab.



2. Edit the properties you want to add, remove or change.
3. Click on the button “Save”.

Note

The code of an asset cannot be changed after its creation.

Create a new tag for an asset

When a tag is not available (no results), and if you continue to type it, then use the button “Enter” of your keyboard to tell the PIM that the tag has to be created. The tag will be automatically created and it will be available for other assets.

Mass add tag to a selection of assets

To earn time you can mass add tag to an asset

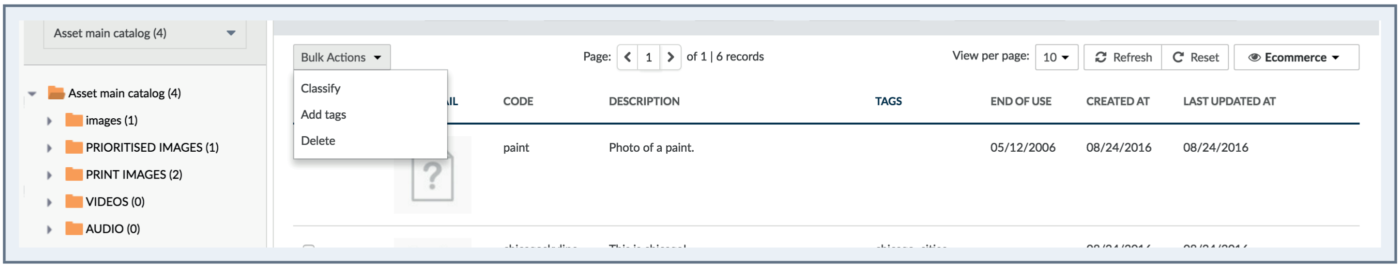
1. Select the assets
2. Click on the bulk action menu
3. Select Add tag
4. Write your tag
5. Click on Next
6. Confirm

A notification message is displayed «The bulk action «add tags to assets» has been launched. You will be notified when it is done.»

The notification centre displays a notification.

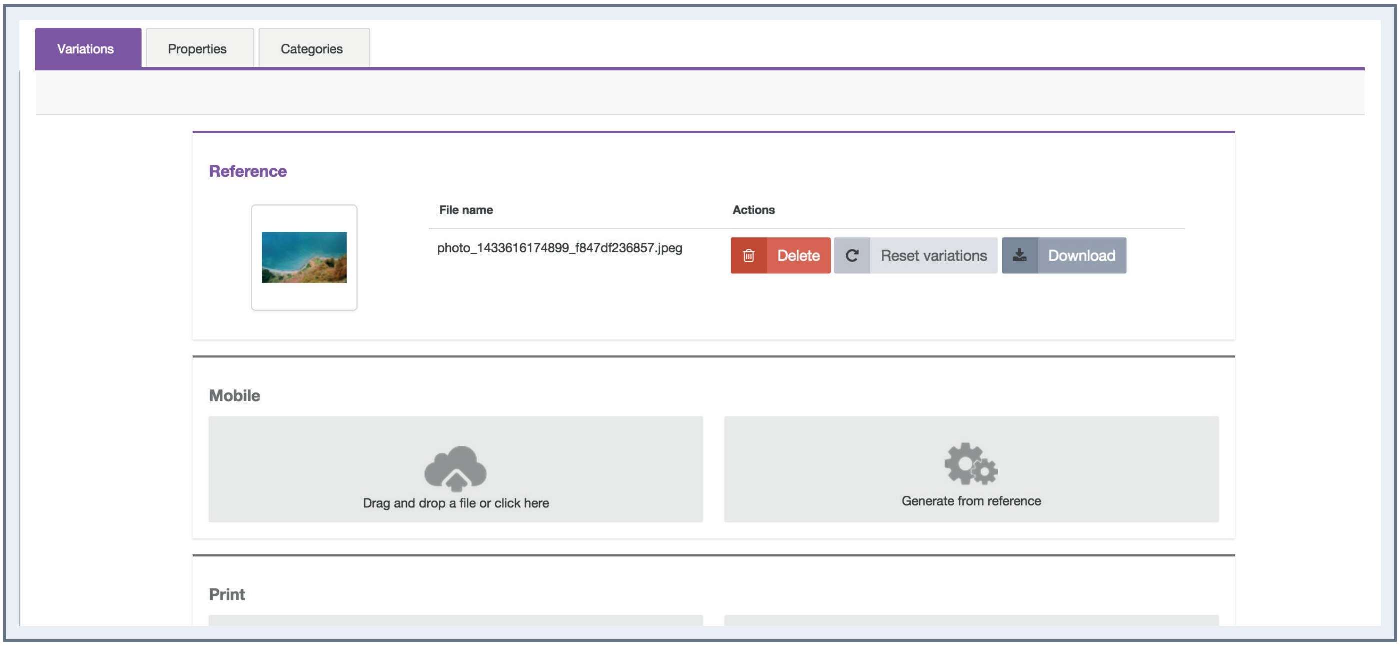
Note

If some tags do nt exist, they will be created.



Edit the files of an asset

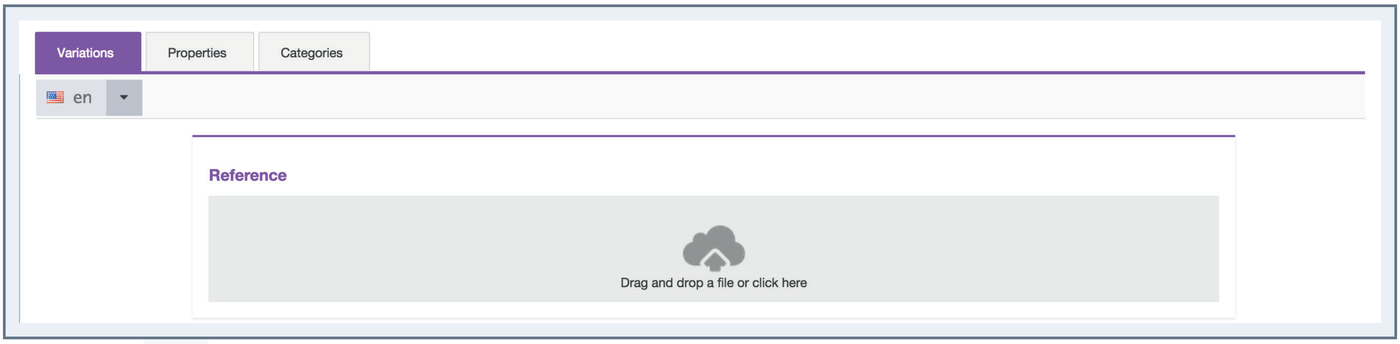
1. Click on the “Variations” tab.



You can either generate variations from a reference file, or put the variation files manually.

Add a reference file

1. Drag and drop the file in the area or click in the area to open the dialog box and select the file to add.



2. Click on the “Save” button.

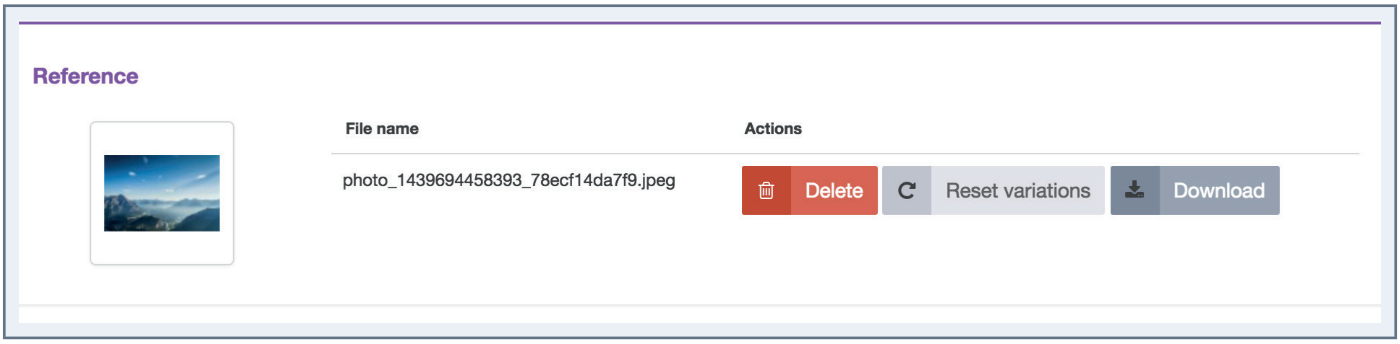
Note

The loading time depends on the size of the file, the complexity of the transformations to apply and the number of channels. During this time, you have to wait.

Then the reference file is added and the variation files are generated.

Download a file (reference or variation)

To download a file, click on the relevant “download” button.



Delete a file (reference or variation)

To delete a file, click on the relevant “Delete” button, and confirm the action.

Note

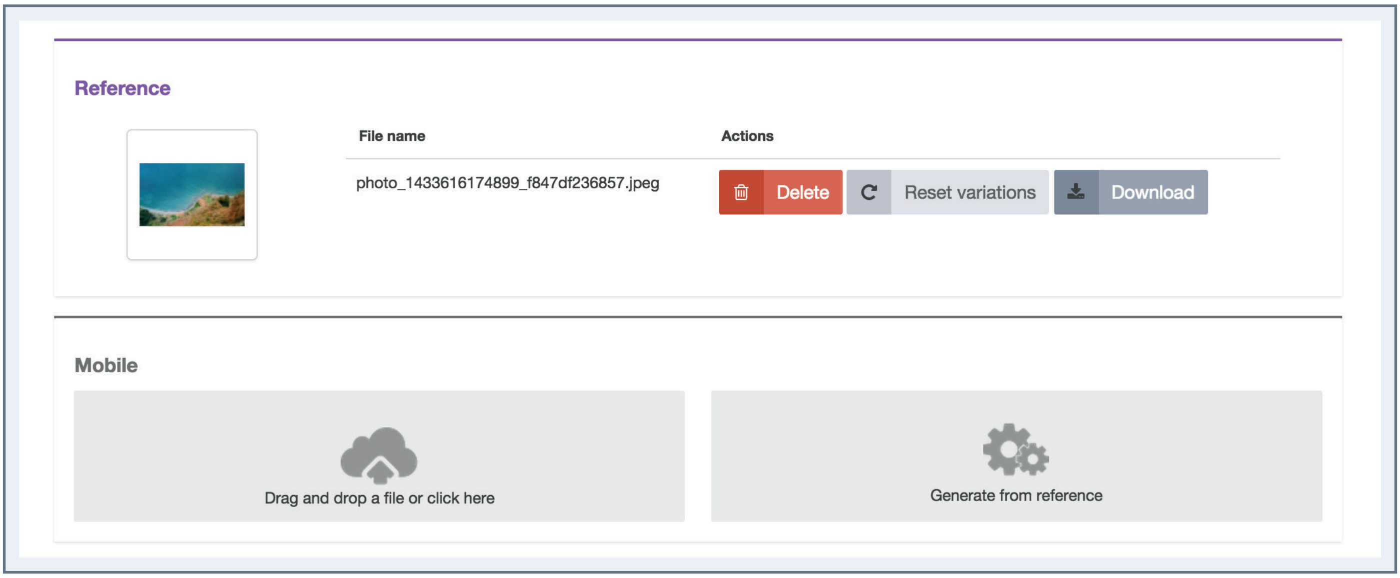
If you delete the reference file, the variation files will not be updated.

Note

If you delete a variation file, it cannot be generated from the reference file automatically, except if you reset variations. See the dedicated section below.

Generate a variation file from the reference file manually

1. Click on the “Generate from the reference file” button.

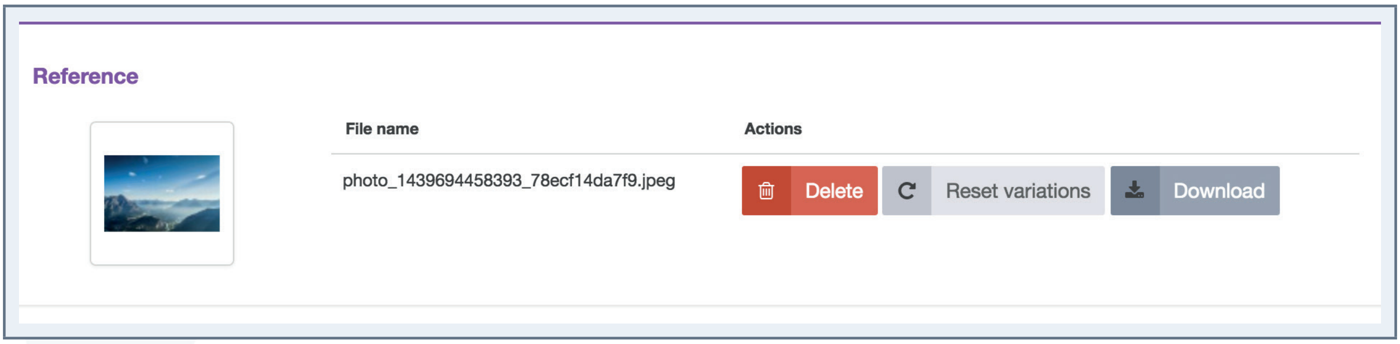


Note

This option is not displayed if there is no reference file.

Generate variation files from the reference file automatically

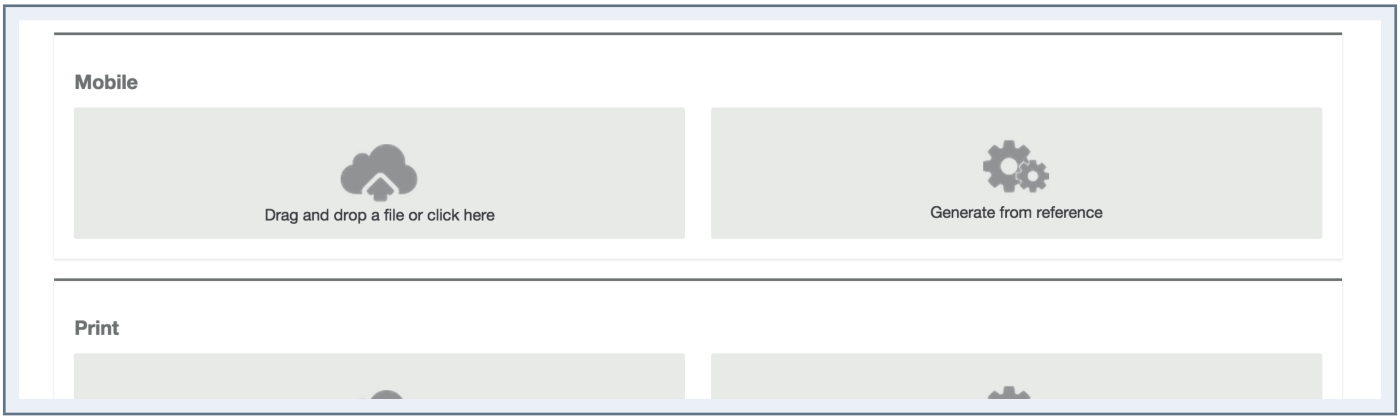
1. Click on the "Reset variations" button.



All the variations different from the reference file are updated. The others are not updated.

Upload a variation file manually

1. Drag and drop the file in the area or click in the area to open the dialog box and select the file to add.



2. Click on the “Save” button.

The variation file will be no more related to the reference file.

Classify the asset in categories

An asset can be classified in one or more categories, but can also be left out of any categories in the PIM. The asset can either be classified in several categories of the very same tree or in different ones.

To add/remove an asset:

1. Open the edit asset form you want to classify in categories.
2. Click on the “Categories” tab.
3. Click on the name of a tree on the left hand side to be displayed.
4. Check the categories in which the asset has to be classified.
5. Uncheck the categories in which the asset should no longer be listed.
6. Then click on the “Save” button.

Mass remove assets from categories

You can remove a selection of assets at once to earn time.

1. select the assets
2. click on the bulk action menu
3. select classify
4. select the category you want to remove
5. click on next

6. confirm

A notification message is displayed «The bulk action «move to categories» has been launched. You will be notified when it is done.»

The notification centre is displays a notification

Delete an asset

An asset can be removed from the PIM. This means that all the relevant asset information will be deleted in the PIM. This action cannot be reverted.

1. Open the asset form you want to delete.
2. Click on the "Delete" button in the asset header page.

3. Confirm the action in the popin.

Mass delete assets

You can delete a selection of assets at once to earn time.

1. select the assets
1. click on the bulk acton menu
1. select delete
1. click on OK in the confirmation pop in

Note

Like a delete of a single asset, this action does not delete asset from the server.

Go back to the asset grid

The button on the right hand side in the header enables you to go back to the asset grid. If you have the edit permission for an asset, when you click on an asset in the grid, it is always the edit form that is displayed.

MASS-UPLOAD ASSETS

Mass-upload assets is pretty convenient especially if you want to update your asset catalog with external sources: photo shooting, new collection, etc...

When mass-uploading assets, Akeneo PIM extracts the data from the file and converts them to save in the PIM.

The PIM uses the filename to know for which asset the file have to be used.

For example, if the filename is "demo_video.wmv", then the PIM will check:

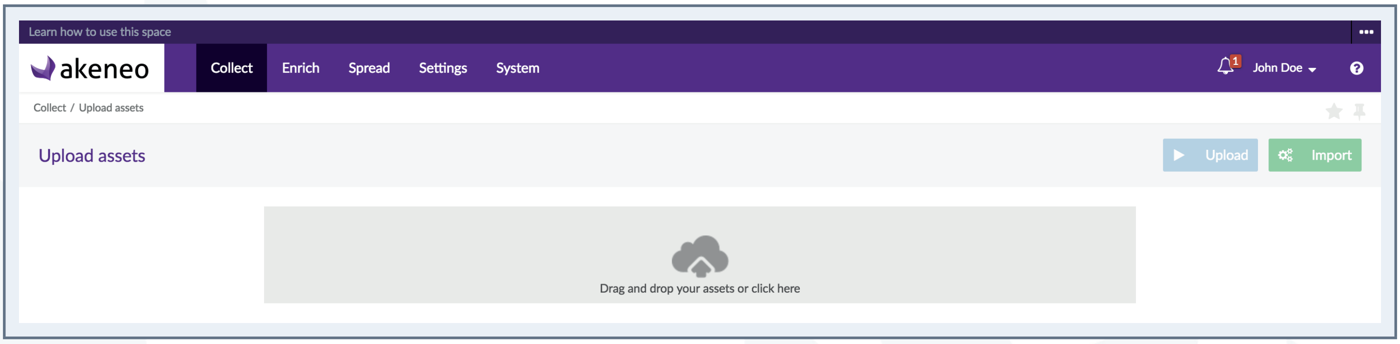
- If the asset with the code "demo_video" already exists
  - If the asset exists, the PIM will update the asset with the code "demo_video" by importing the file "demo_video.wmv" as its reference file (and generate the variation files accordingly).
  - If the asset doesn't exist, the PIM will create a new asset with the code "demo_video" and with the file as the reference file, so that the variation files can be generated.

For example, if the filename is "PIM_userguide_en_US.pdf" then the PIM will check:

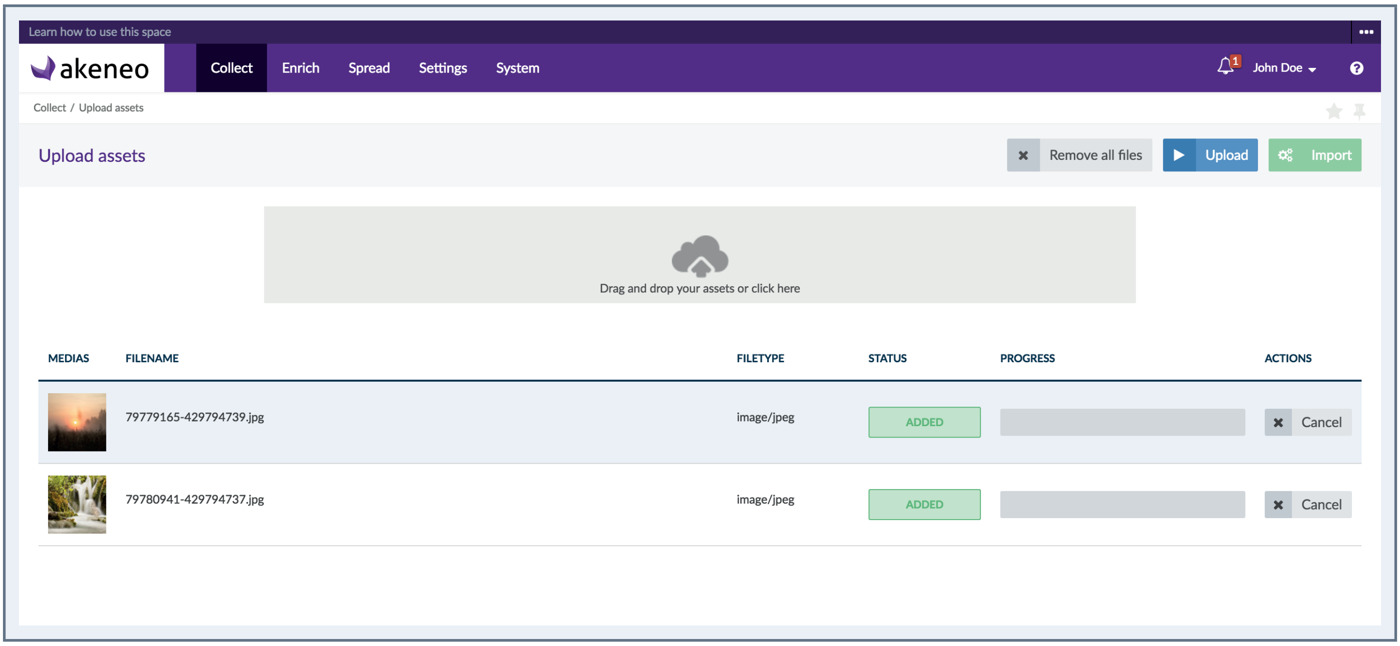
- If the asset with the code "PIM_userguide" exists
  - If the asset already exists, if the asset is localized
    - If the asset is localized, the PIM will import the file as the reference for the given locale code at the end of the filename ("en_US").
    - If the asset is not localized, the PIM will display an error message in red, to inform that the PIM does not know what to do with this file.

To mass-upload assets:

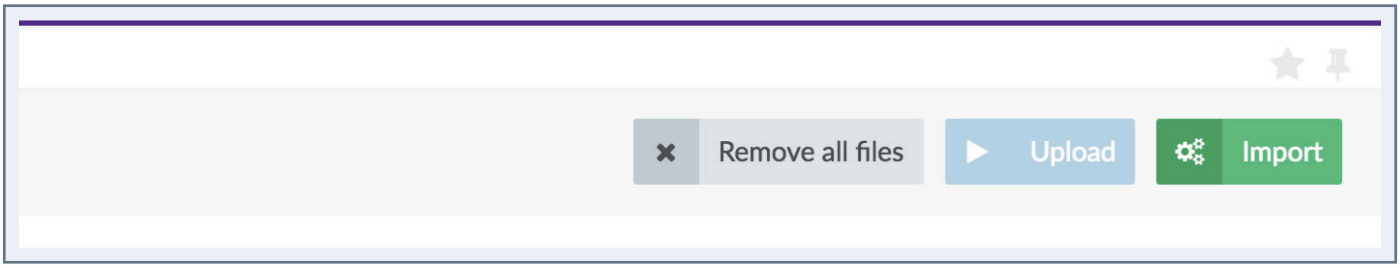
1. Go to Collect > Upload assets.



2. Drag and drop your asset files in the page or click on the "Add files" button to open the dialog box and select the asset files you want to upload.



3. Click on the “Upload” button to upload assets.
4. Click on the “Import” button to create the assets.



The report of the import is displayed.

There are some available options during the scenario.

Cancel the mass-upload of files

When files are added to the list with the “SUCCESS” status, they are still available even if you logout or move to another page.

To clean the list of files, click on the button “Cancel upload”. All the files will be removed and will not imported.

Remove a file before uploading

When files are added to the list, they may be removed whatever their status.

To remove the file from the list, click on the “Cancel” button in the row. The file will be removed and will not be imported.

IMPORT PRODUCT DATA

Importing product data is pretty convenient especially if you want to update your catalog with external sources: vendors, ERP, etc.

There are two options for the connectors to process the file to import the product information:

- Can be executed directly from the UI Akeneo PIM (uploading file)
- Or from a given path in the configuration of the import profile, enabling the Akeneo PIM to fetch the file to import when executing the command.

When importing product data, Akeneo PIM extracts the data from the file and converts them to save in the PIM.

Depending on the import profile, the import may create proposals to review so that the products are not directly updated.

CSV or XLSX file import process consists of:

1. Creating an import profile. Please refer to the administration guide for this step.
2. Building the file, manually or via a third party application.
3. Launching the CSV or XLSX file import.

You can change the import configuration in the context of the import profile management. Please refer to the Akeneo PIM administration guidelines for it.

To learn more about a connector and how it works, please refer to its documentation. For example, refer to the documentation of the Akeneo connector to import CSV files or XLSX files.

Note

A connector can import product information in any required data format: File, Web API, etc.

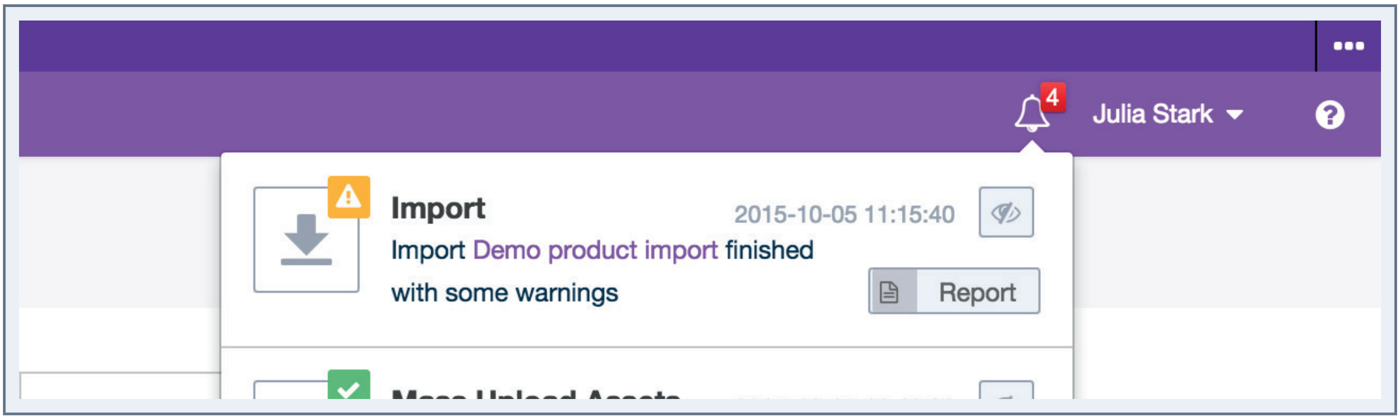
Launch an import

To start a product import:

1. Go to the Collect > Import Profiles menu to see the list of the import profiles available.
2. Select the import profile you want to execute, then click on the relevant line.

3. The page for the import profile is prompted. Click on the “Import” or “Upload and import” button if the connector enables to load a file from the PIM interface.
4. The page of the import execution is displayed. The page refreshes continually to update the information displayed.

When the import has ended, a notification is available on the top right of the pages of Akeneo.



An email can also be sent depending on the system configuration. For further details on this, please refer to the PIM technical documentation.

EXPORTING PRODUCTS

This feature allows you to provide your product information to third-parties like e-commerce platforms, mobile applications, suppliers... or for other needs.

You have several ways to export your product information:

- You can manually download the export file: you execute the job from the PIM user interface and you download the generated file.
- You automatically send the export file to the third-party, by setting a path in the export profile configuration enabling the PIM to automatically drop the file when executing the command.

When exporting the products, Akeneo PIM extracts data from the PIM and converts it to push in a certain format to a file or directly to a third party application (eg Magento).

To export product information, you need to:

1. Have an existing export profile or create a new export profile, please refer to the administration guide for this step.
2. Start the export (the exported file will be in CSV or XLSX format).

You can change the export configuration under the export profile management. Please refer to the Akeneo PIM administration guidelines to do so.

To learn more about connectors and how they work, please refer to the relevant documentation. For instance, for more information about the CSV connector, refer to the documentation of the Akeneo connector Akeneo to export CSV files or XLSX files.

Note

A connector can export product information in any required data format: CSV, XLSX files, Web API, etc.

Using the Product Export Builder

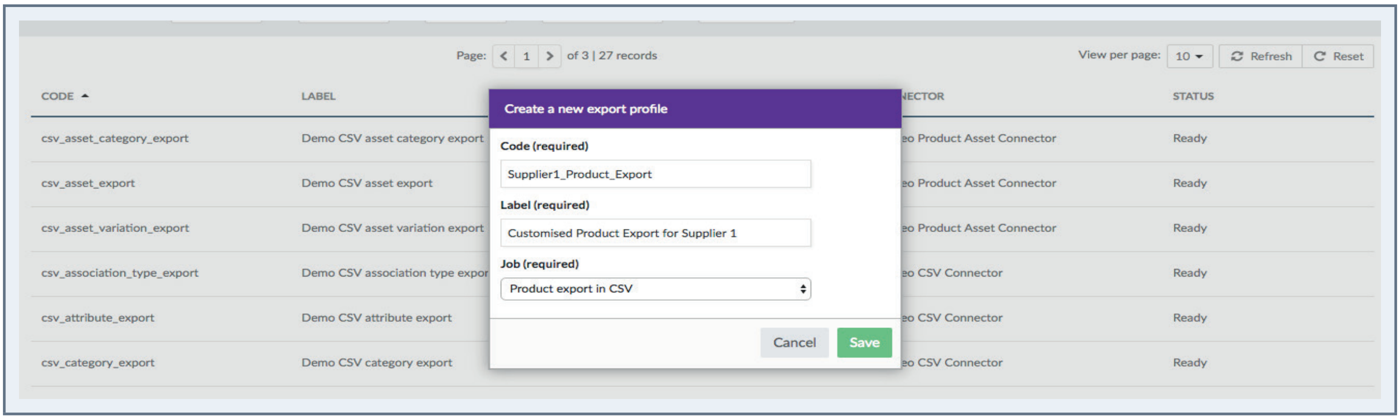
You can now configure your product export profile to only export the data you need thanks to the Prodcut Export Builder. This feature allows you to filter your export data on several product and system information.

If you are granted with the permissions, you can either create your own product export using the Product Export Builder or edit an existing product export profile.

Creating a product export profile

To create a product export:

1. Go to Spread/Export Profiles,
2. Click on the «Create export profile» button,
3. Indicate a unique export code, an export label and select the job: csv_product_export or xlsx_product_export (all fields are required)



4. Save your new export profile.

The PIM opens the Export Profile in Edition mode so you can customise it and select the information you want to export. You can start customising your own export profile to only export the data you need.

Editing a product export profile

From an existing product export profile:

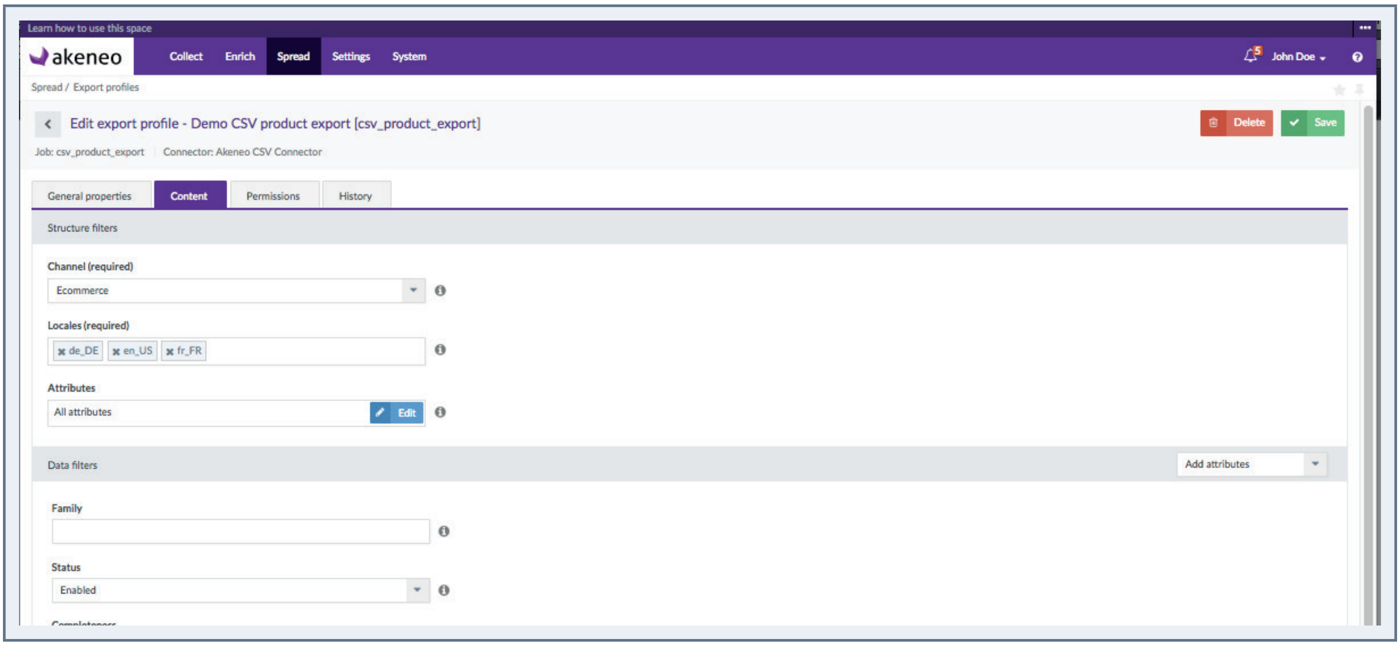
1. Go to Spread/Export Profiles,
2. Click on the product export profile line to edit.
3. Once the export profile is displayed, click on the «Content» tab.
4. Click on the «Edit» button on the top right hand corner to edit the exported product information

From a newly created product export profile:

Click on the «Content» tab.

To edit the product information:

You land on a page divided in two sections:



Structure Filters: this part allows you to define the structure of the exported file, namely its columns: you will have to specify a Channel and one or more locales to export (required fields). The last field «Attributes» will allow you to select the attributes to be used as file columns.

Data Filters: this part allows you to filter your data on several product and system information such as the family, category, status, completeness or even insert a list of SKUs, you can also add new attributes to use them to filter your data.

Using the structure filters

To select a channel:

Each export can only be linked to one channel, please select the relevant channel of products to export.

To select one or more locales:

By default, all activated locales for the channel previously selected are exported. You can export product information for one or more locales depending on your needs.

For instance: Peter needs an export for his Spanish translator: he selects French and Spanish locales, the exported file the translator can enrich the product information for the Spanish locale based on the French product information.

To remove a locale:

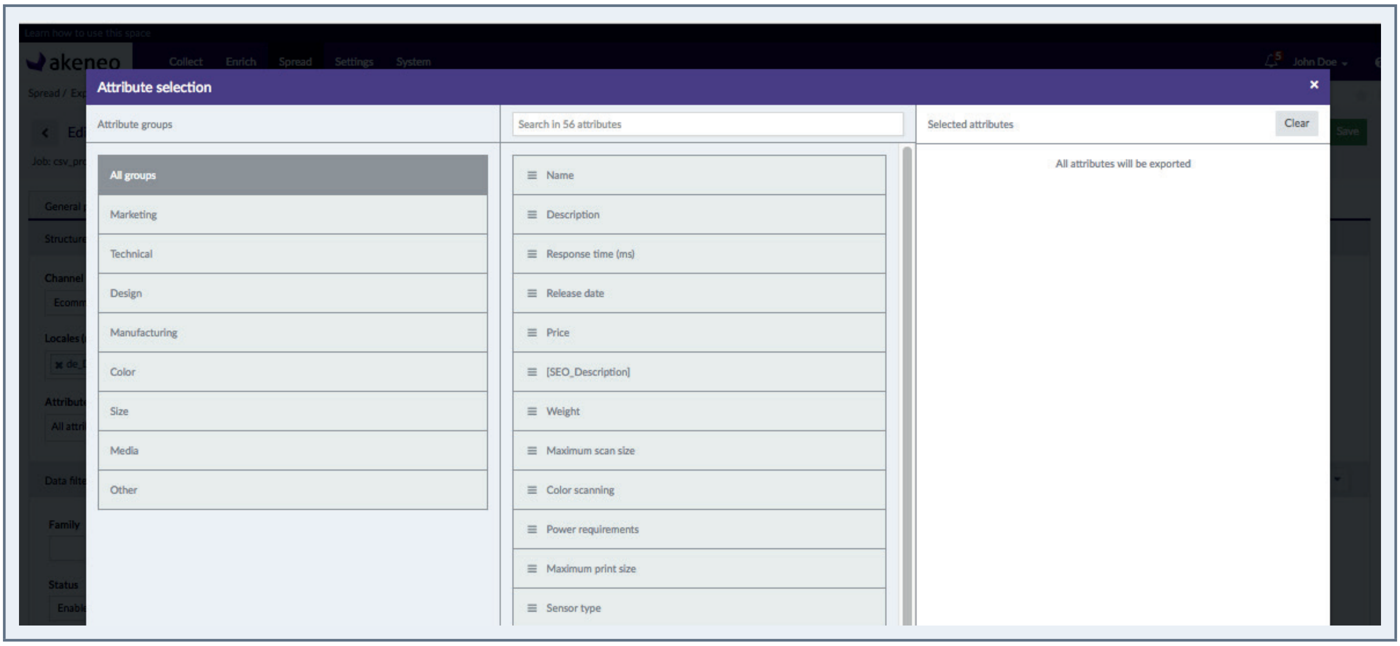
Click on the small cross nearby the locale code.

To add a locale:

Start typing your locale code in the field, the PIM will automatically propose you the matching locales. Click on the locale to add it to the field.

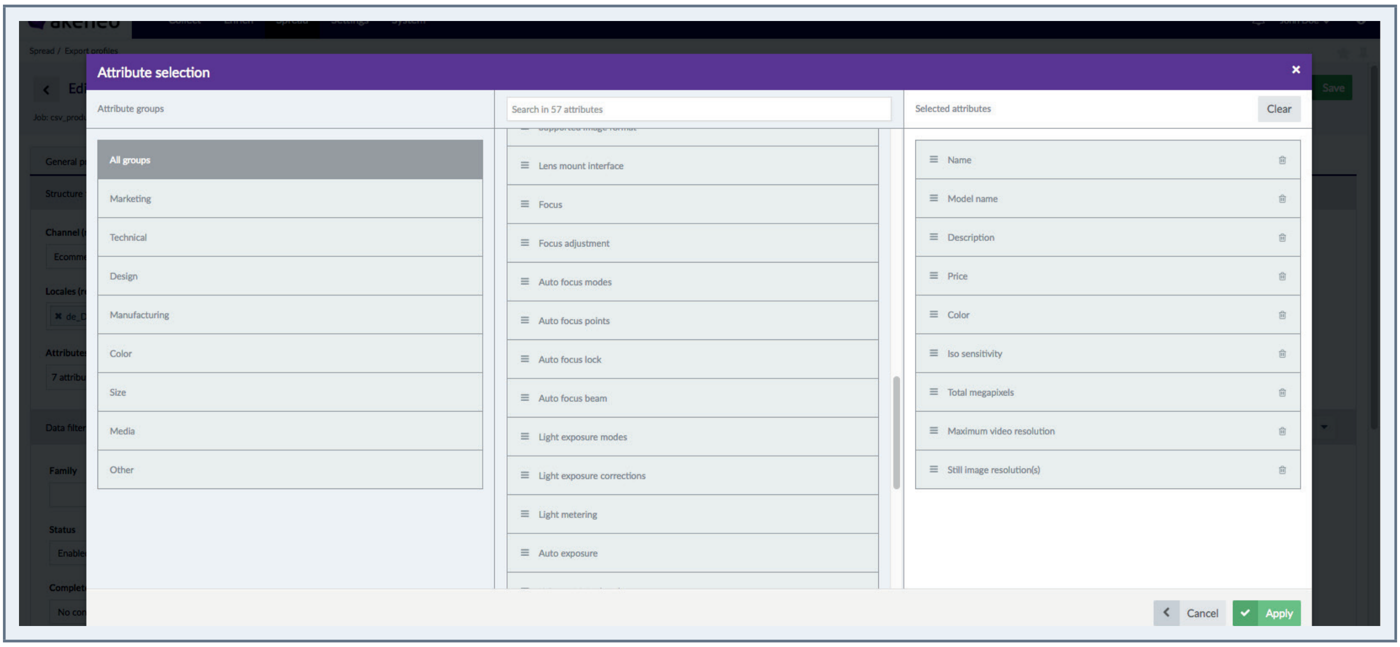
Selecting attributes as file columns

Click on the «Edit» button in the field to open the Attribute Selection popin:



The popin is divided in three parts: the left part shows the attribute groups, the middle part displays the attributes belonging to the selected group, and on the right side, you will find your attribute selection. By default, note that all attributes are exported.

To make your own attribute selection, click on left side to select a specific attribute group (or All groups to display all attributes). Place your mouse on your attribute and drag and drop it into the right-most column. The selected attributes will be displayed as columns in your export file.



You can reorder your attributes by dragging them up and down. To clear your selection, click on the «Clear» button. To save your attribute selection, click on «Apply».

The Attributes field will display you the number of attributes selected for the export.

Note

By default, the SKU field is exported in the product export.

Using the data filters

To filter on families:

By default, this filter is empty meaning that **all products will be exported regardless of the family they belong to**, products without families will also be exported.

To add a family:
If you want to export products belonging to specific families, click on the drop down list and click on the families to add in the field.

To remove a family:
Click on the cross nearby the family label to remove it from the field. Products belonging to this family will not be exported anymore.

To filter on products' statuses:

You can also filter on the status of your products, three options available:

- *All*: to export all products whatever their status is
- *Enabled* (default option): to only export enabled products
- *Disabled*: to only export enabled products

To use the completeness filter:

The following drop down enables you to filter on completeness of selected locales. Four options on completeness are proposed:

- *No condition on completeness:* all products will be exported whatever their completeness is.
- *Complete on at least one selected locale* (default option): products must be complete on at least one locale
- *Complete on all selected locales*: products must be complete on all locales (if you have selected more than one locale).
- *Not complete on all selected locales*: products must not be complete on all locales (if you have selected more than one locale).

For instance, with 4 products and 2 exported locales fr_FR and en_US:

Product A: complete on fr_FR, uncomplete on en_US
Product B: uncomplete on fr_FR, complete on en_US
Product C: complete on fr_FR, complete on en_US
Product D: uncomplete on fr_FR, uncomplete on en_US

Exported products according to each completeness option for the locales fr_FR and en_US:

Option 1: All products (A, B, C, D) will be exported.
Option 2: Only products A, B, C will be exported.
Option 3: Only product C will be exported
Option 4: Only product D will be exported.

To filter on date:

You can now export your product on a specific time condition:

- *No date condition* (default option)
- *Updated products over the last n days (e.g. 6)*: you want to export products updated since the last 'n' days:
- *Updated products since this date*: you want to export products updated since a specific date
- *Updated products since last export*: you want to export products updated since the last export

If you select «*Updated products over the last n days (e.g. 6)*», a field will be displayed nearby the drop down menu. Indicate a number of days (**please only use numbers)** in this field.

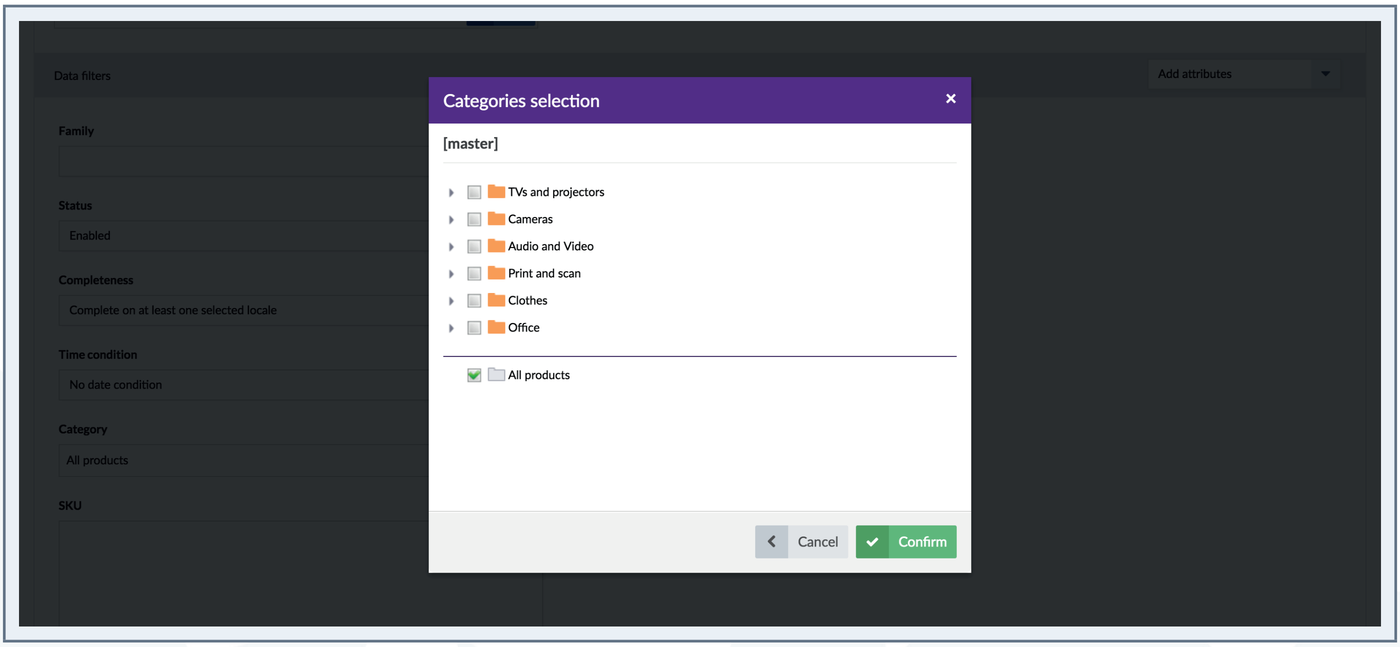
If you select «Updated products since this date», the date picker will be displayed to choose a date. To change the date, click again on the date picker. To completely remove a date, select another time condition.

To filter on categories:

In the export builder, you can also configure the category (ies) of the channel tree you want to export.

For example, you want to export the clothing products (categories «Clothing» in the tree) to update in mass the families because the families have been refined and new families have been created for clothing.

By default all categories are exported. To select a category, click n the «Edit» button The categories of the channel tree are displayed:



You can expand a category and see its subcategory by clicking on the arrow:

This arrow also enables to collapse a category.

You can select a category and its subcatgories:

Or only the subcategories:

Clicking on «All products» allow you to export all categories by erasing the above selection

To filter on SKU (or product identifiers)

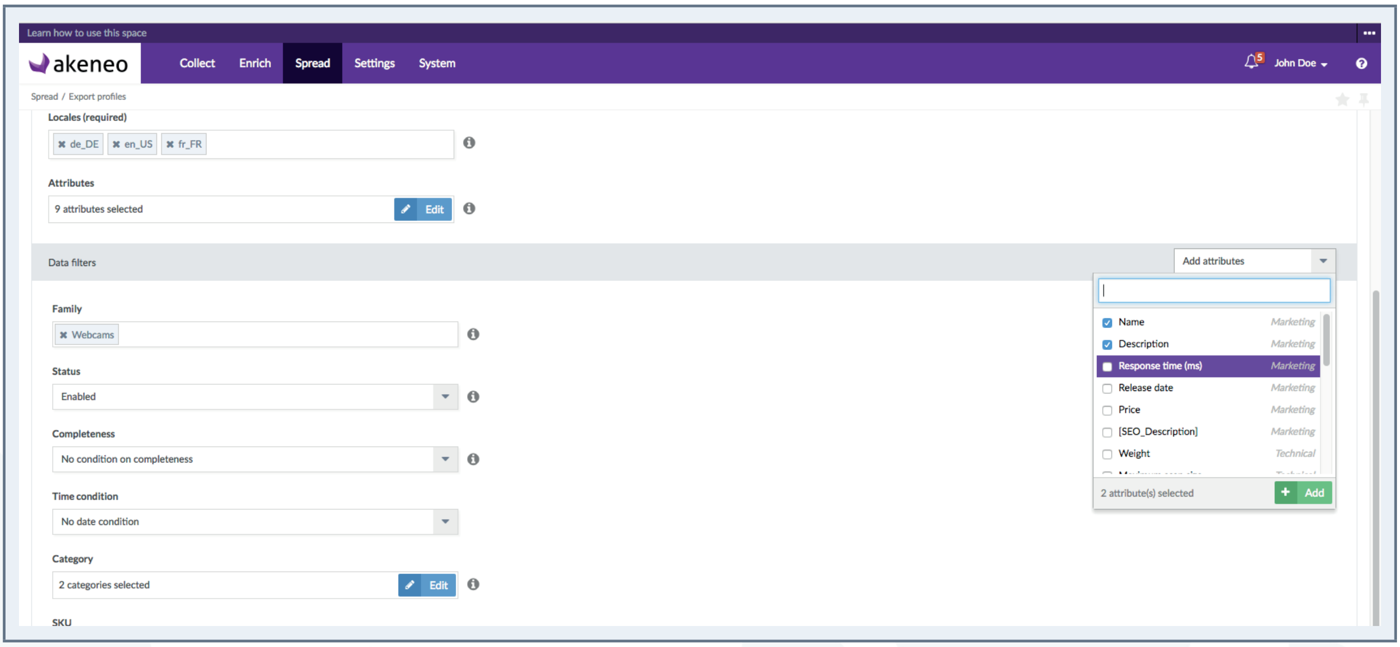
You can make a selection of identifiers to export by adding them in the SKU field. You can copy and paste a list of identifiers, they must separated by comma, space or line breaks.

Note

You can easily copy an identifier list from a csv or xlsx file and paste it in the SKU text area.

To filter on attributes

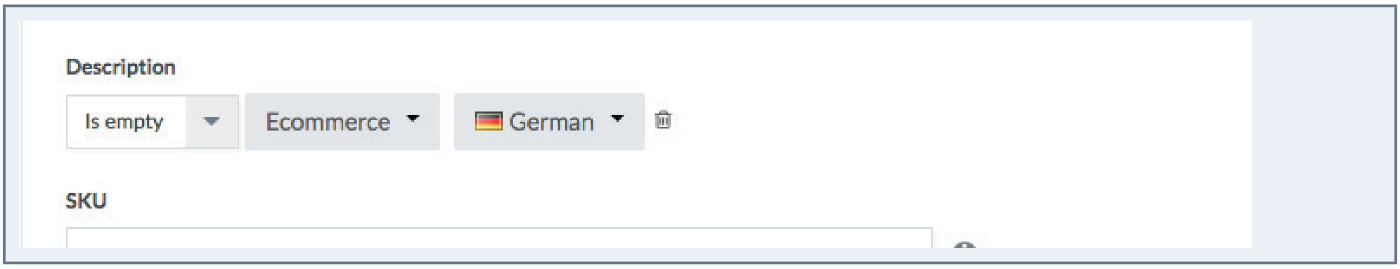
An additional filter «Add attributes» is available on the right side of the page. This drop down menu allows you **to add attributes as filters for the export**.



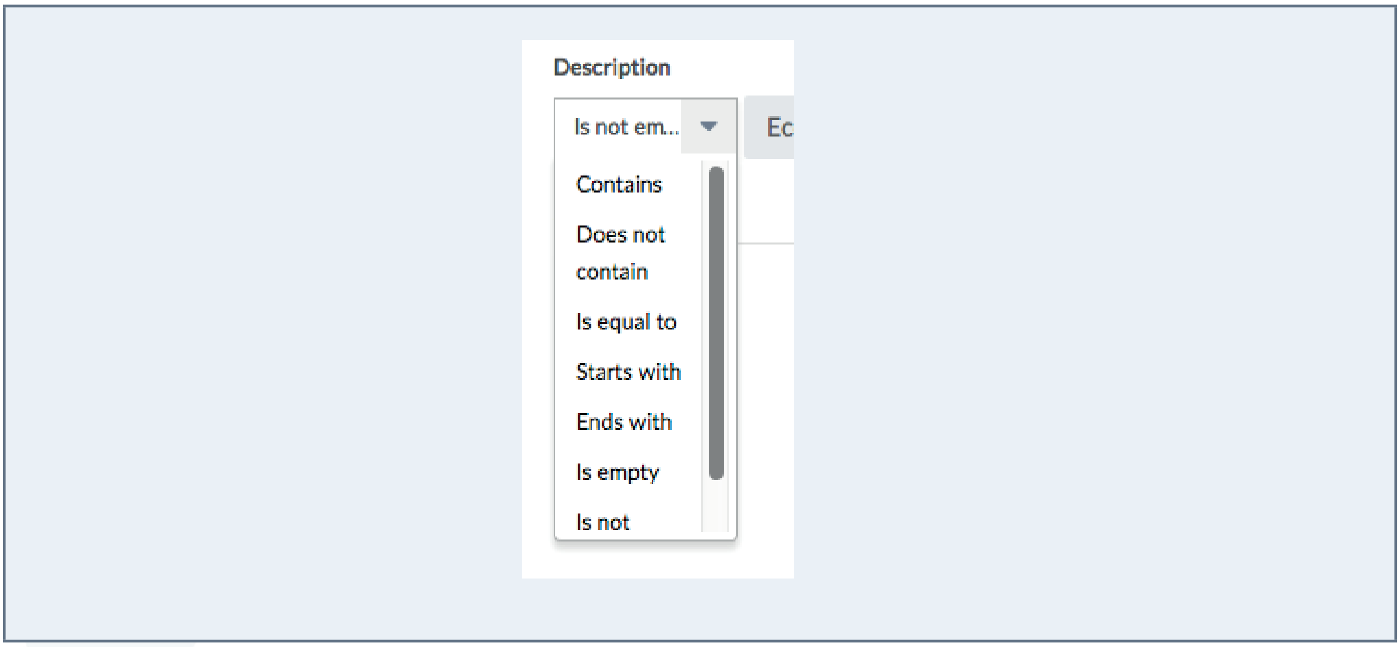
Select the attributes you'd like to use as filters. Once selected, they will be displayed in the Data filters area, above the SKU field.

For instance, you are working with a German translator, he needs to only work on products that are missing their German descriptions. You can make a filter on the description field saying:

Only export the products having no description for German locale and e-commerce channel.



Each attribute comes with a list of operators, for instance for text area fields, you will have the following operators available:



Notes

1. To create a filter on an attribute, you do not need to have it as a column in your export file.

2. All attributes created in the PIM can be used in the Product Export Builder.

3. Any attribute can only be used once as a filter.

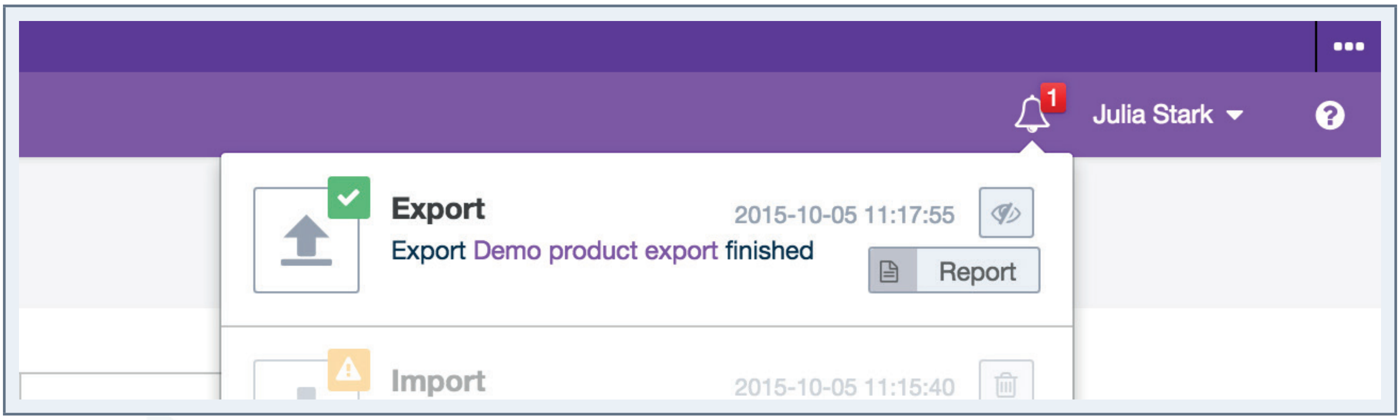
Note on the Product Export Builder

The Product Export Builder feature **is available for the product and published product export profiles** (for the CSV and XLSX connectors)

Launching an export

1. Go to Collect > Export Profiles to see the list of available export profiles.
2. Select the job profile to execute, and click on the relevant line.
3. The export profile page is displayed. Click on the “Export” button.
4. The execution of the export page is prompted. The page refreshes continually to update the information displayed.

When the export has ended, a notification is available on the top right of the Akeneo PIM.



An email can also be sent depending on the system configuration. For further details on this, please refer to the technical online documentation of the PIM.

THANK YOU!

akeneo