USER GUIDE

END-USER ROLE

Version 1.4

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GLOSSARY

Asset

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

Category

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

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

General rules concerning categories: a product can be classified in any number of categories or in any of the categories among all existing trees.

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

Channel

A channel in PIM Akeneo 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 as a filter on the catalog with the following properties:

- a tree of categories: this defines the selection of products to export.
- one or several locales: this specifies which values the channel requires: product information in French but not those in Italian, even if these values exist.
- one or several currencies: this defines what values the channel requires about type attributes: prices in Euros and Dollars, but not in pound sterling
- Completeness:.this defines which information is mandatory for a product to be selected by a channel, according to the product family. For instance: the description must be present for the e-commerce channel, but only the name of the product must be present for mobile
- status: Deactivated or inactive products are ignored by the channels.

At least one channel must be present in the PIM.

Completeness

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The completeness can define and track when a product has enough information to be selected by a channel, to be exported to other third-party applications.

A product is complete when all attributes defined as “required” for a channel according to his family, have values for the local channel.

Connector

Connectors are external modules implemented to interact with external systems and Akeneo PIM. They manage the 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 made available just like for instance the screen configuration (import and export profiles).

A connector can be generated to import data (products, categories, attributes) from different sources (ERP, Excel files) to Akeneo. And another connector can be created to export the products from Akeneo to an E-commerce platform as Shopify, Drupal, Magento, etc.

Family

In Akeneo, a product family is a collection of attributes, which is defined by your product typology. For example, a family can be:

- a cup
- 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. 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 form automatically.

Example: the family “Mug” is composed of the following attributes:

- Creator
- Weight
- Description
- Color

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

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Any product can be part of a family, but a product can be apart and not be assigned to a family. In this case, the product has no default attributes.

A family can also define the completeness of products.

Reference data

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

Variant group

A variant group is a product group with specific properties compared to the other types of product group :

- It has variation axis (required). The variation axis allow to secure the unique combination of values for some attributes, in the products added to the group. For example, in a variant group with the following attributes used as axis “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.
- It has attribute values (optional). A variant group may have some attribute values, in order to apply them for each product belonged to the variant group.

Note

A variant group does not allow to define the attributes for producuts (like the families). Only attribute values are applied. Ex : If an attribute is added for a variant group but no value is given, then the considered value is “” (empty) for all products in the group.

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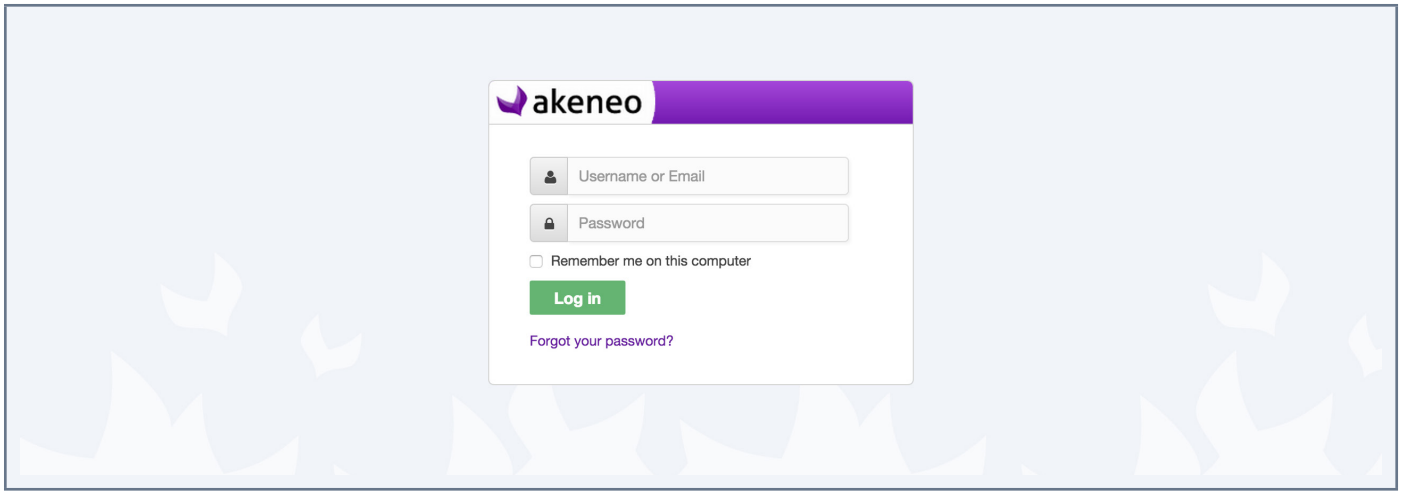
FIRST STEPS INTO AKENEO PIM

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 displays, also named 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.”

Recover password

1. Click on the link Forgot password? “
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 in your account. Follow the instructions to log in and modify your password.

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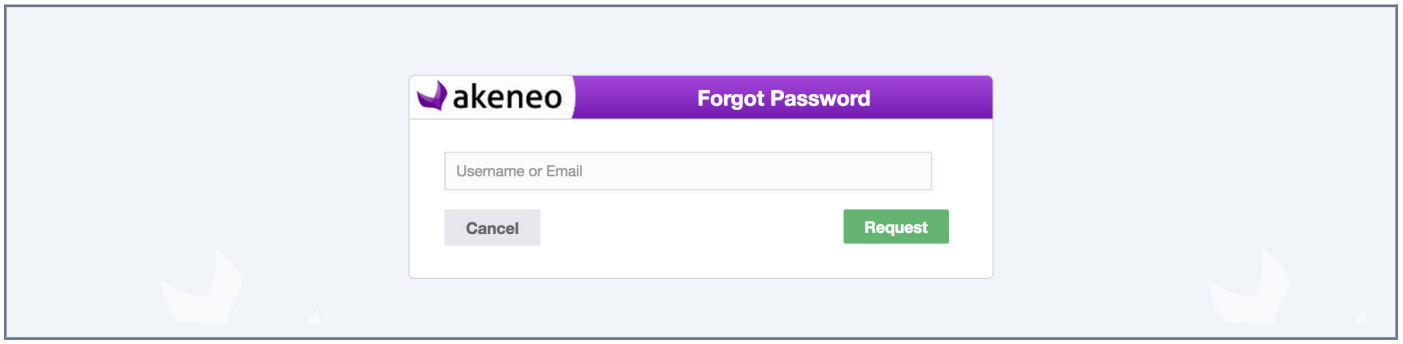


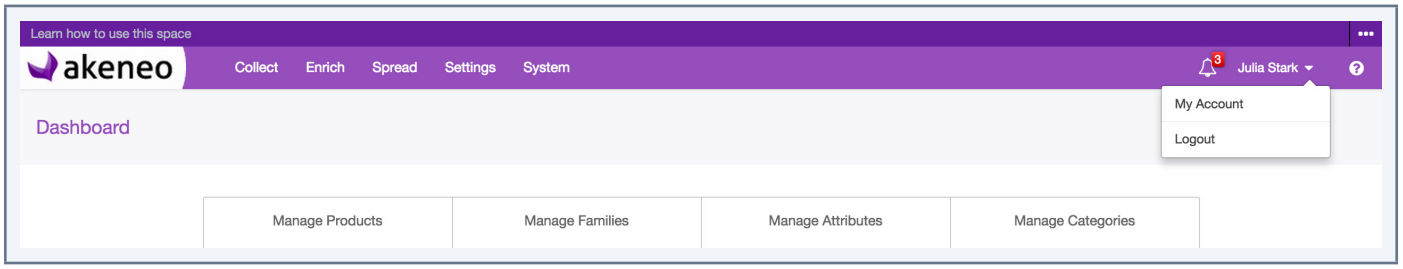
Note

If you do not know what email was given for your Akeneo user account, please contact your Akeneo administrator.

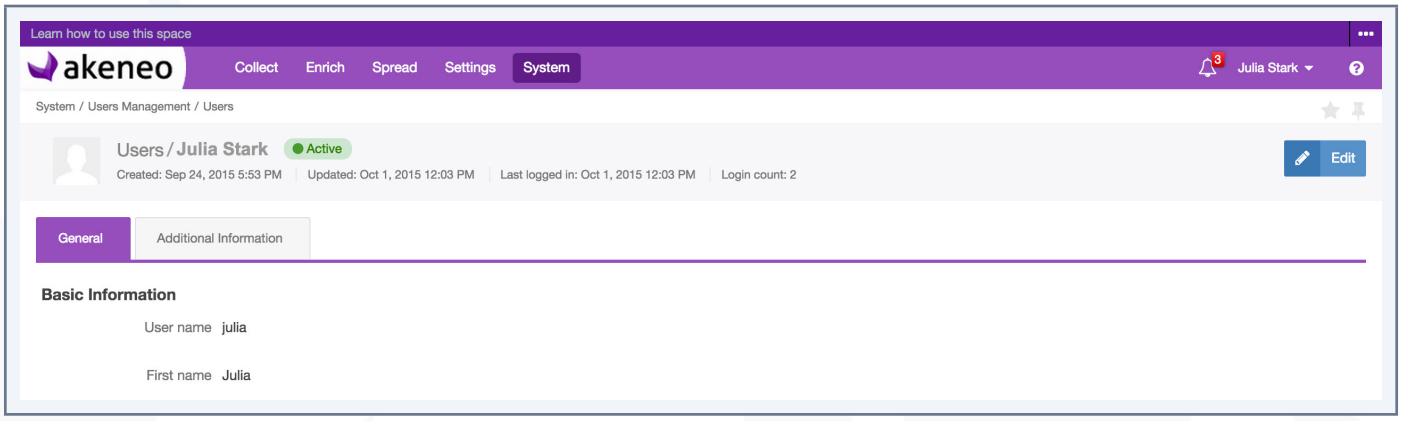
Change your password

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

1. Click on your name at the top right 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

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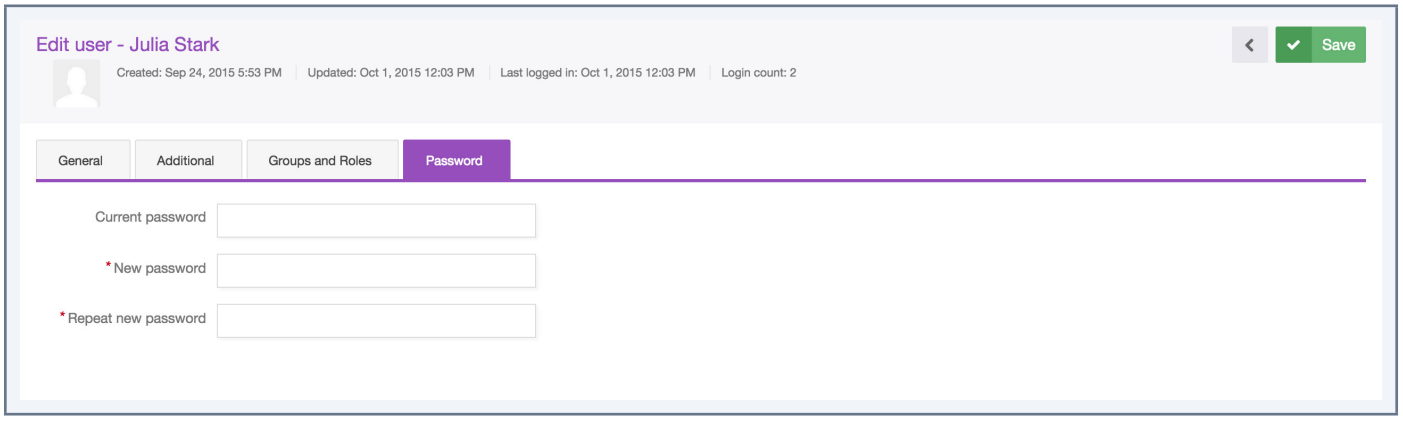
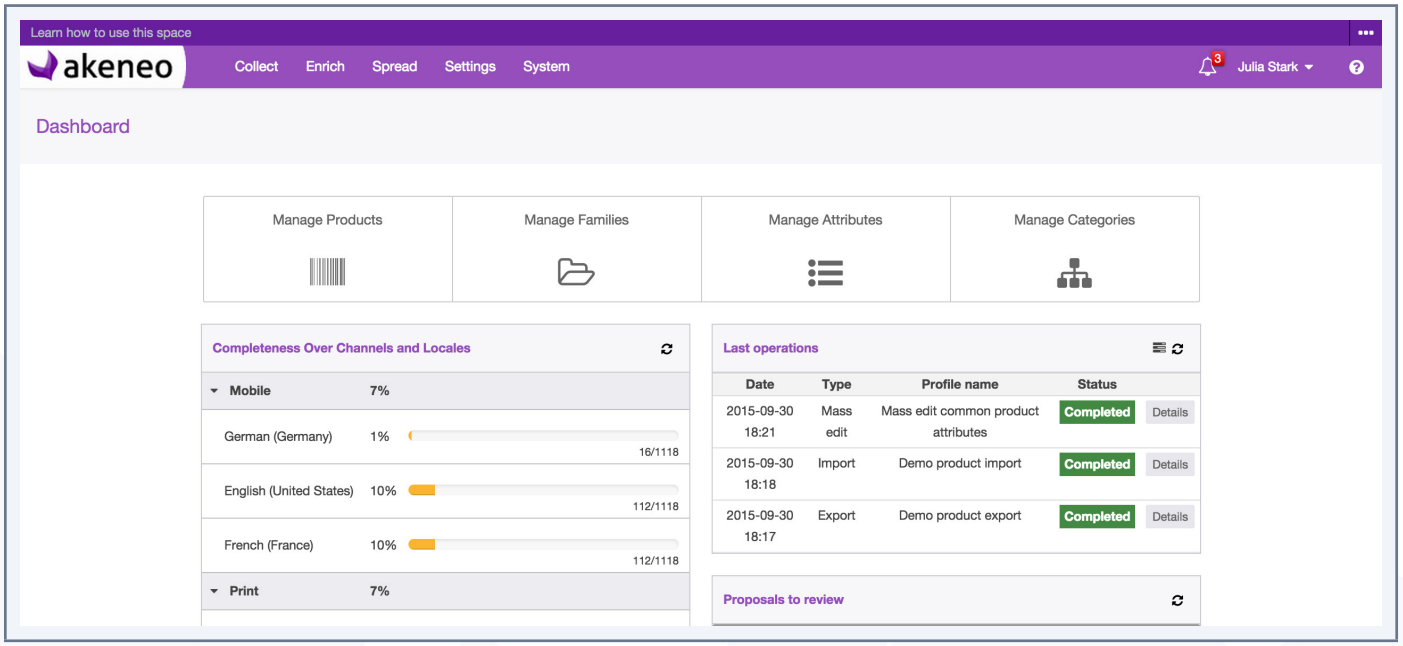


4. Fill in the fields as shown to change your password
5. Click on the button “Save“

Your password has now been changed.

Exploring the working area in Akeneo PIM



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

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

The white part of the screen (below the purple bar) contains the pages in which you currently are.

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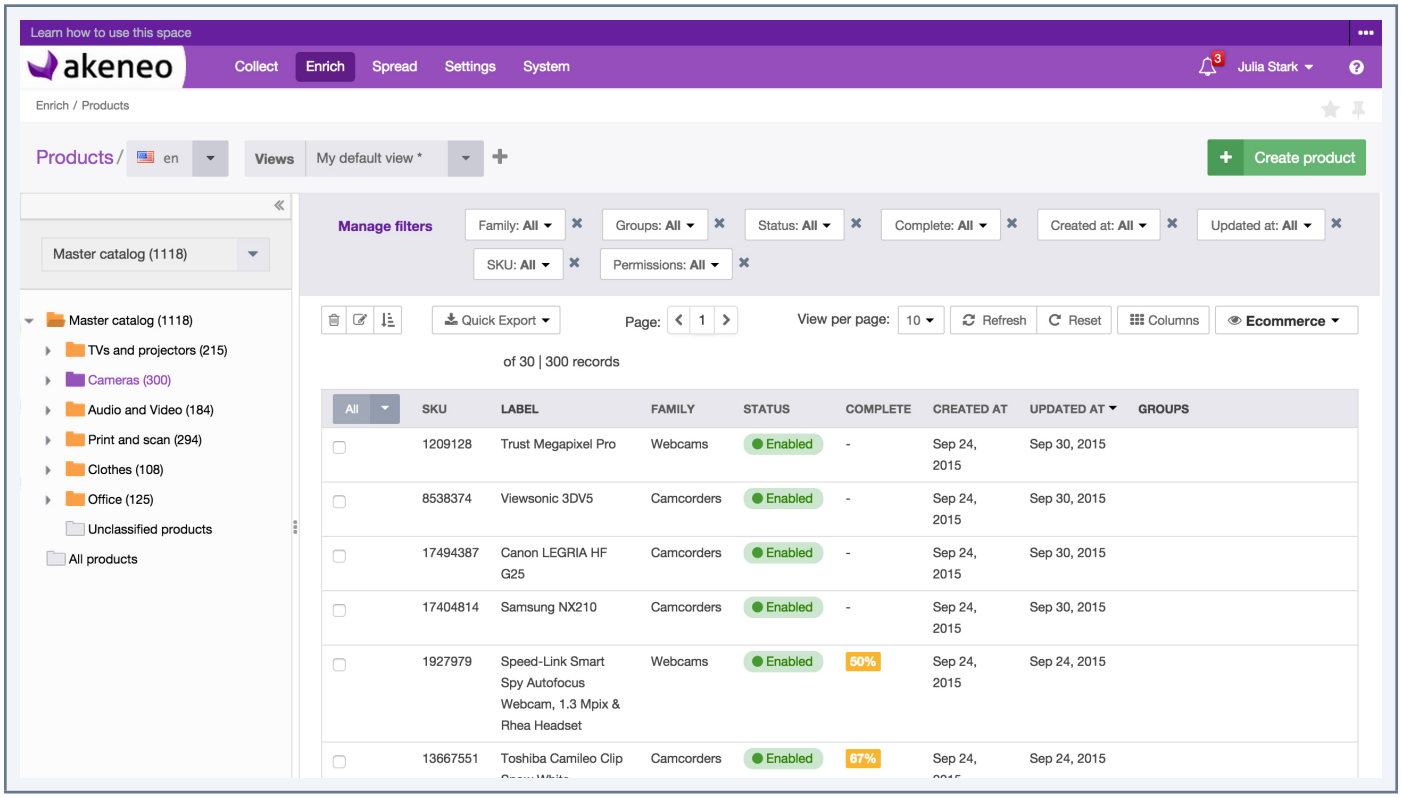
USING THE PRODUCT GRID

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

- The category labels
- The attribute labels that can be used as filters
- The labels of attribute groups
- The option labels that are used as a value (in the grid)
- The display of the completeness (what is the percentage in the complete column)

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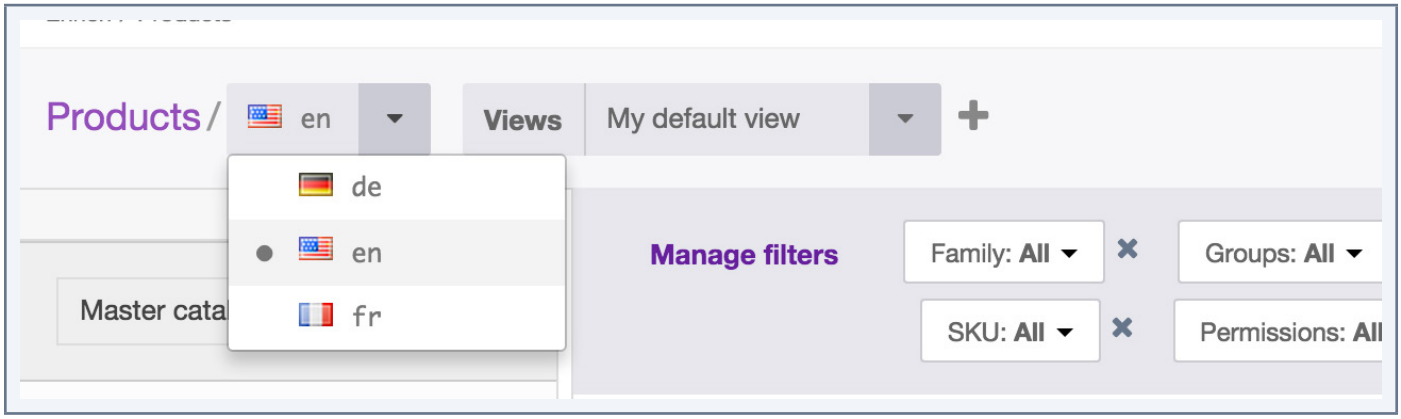
- The values in the product grid

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



Note

The choice on the locales are those at least added in one channel. If you do not see your working locale, this is more likely whether:

- 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 the “channel configuration” in the PIM Administration Guide.

Note

The working locale selected in the page of the product grid is applied when editing or viewing a product form.

Note

The working locale is very different from the locale of the user interface of the PIM. This latter is set when installing the PIM and is applied to all the PIM users.

Setting the channel context

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

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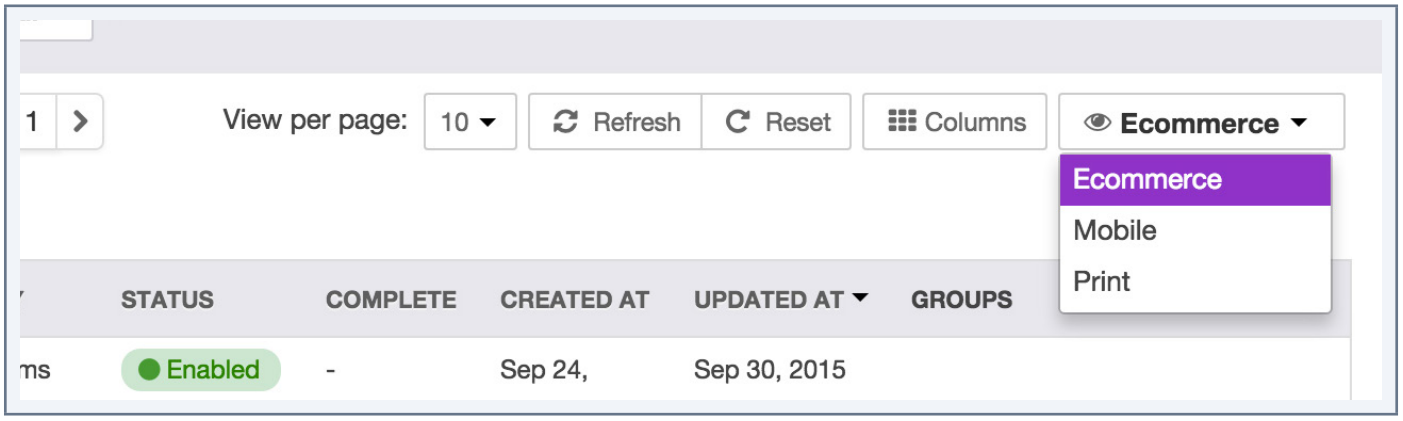

The selection of the working channel impacts the values in the product grid to be displayed, especially in the case of different values according to which channel you are currently working. Selecting a channel will enable the value to be displayed.

This also impacts the completeness (percentage in the column), since there may be as many completeness as channel / local pairs

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

Note

The available channels are those concerned with local selected higher up on the page. If there is not a working channel is selected as the local is not required by the channel you want, so it is not proposed. To add a local to a channel, refer to the “Configure channels” in the PIM Administration Guide.

Note

The working channel selected in the page of the product grid is applied when editing a product form.

Page numbering

The product grid displays a page number: all the products in the grid come per 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 to select and view more products

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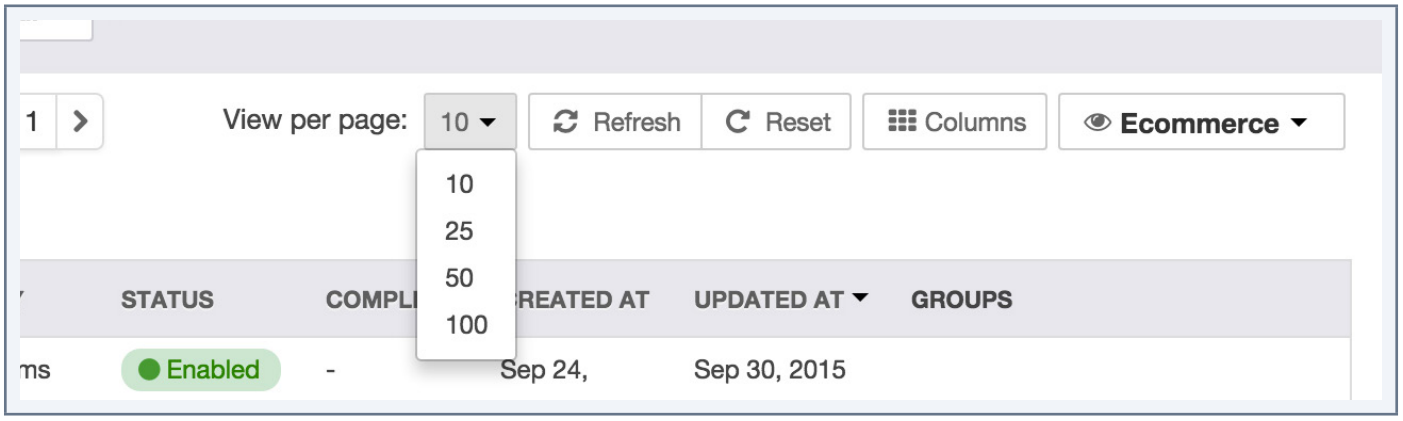

Note

This page number is not taken in account as a contextual element of work. This means that when you leave the page to view a product form for example, and you go back to the page of the product grid, then the number of products per page returns to the initial configuration, which is set to “10”.

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.

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

Note

the navigation through the pages of the product grid is not retained as a contextual element of work. This means that when you leave the page to edit a product form for example, and you go back to the page of the product grid, then the page number returns to the initial configuration, which is set to page “ 1 “.

Browsing the product catalog by category

In the left panel of the product grid, stands the catalog tree for the categories. This panel allows you to

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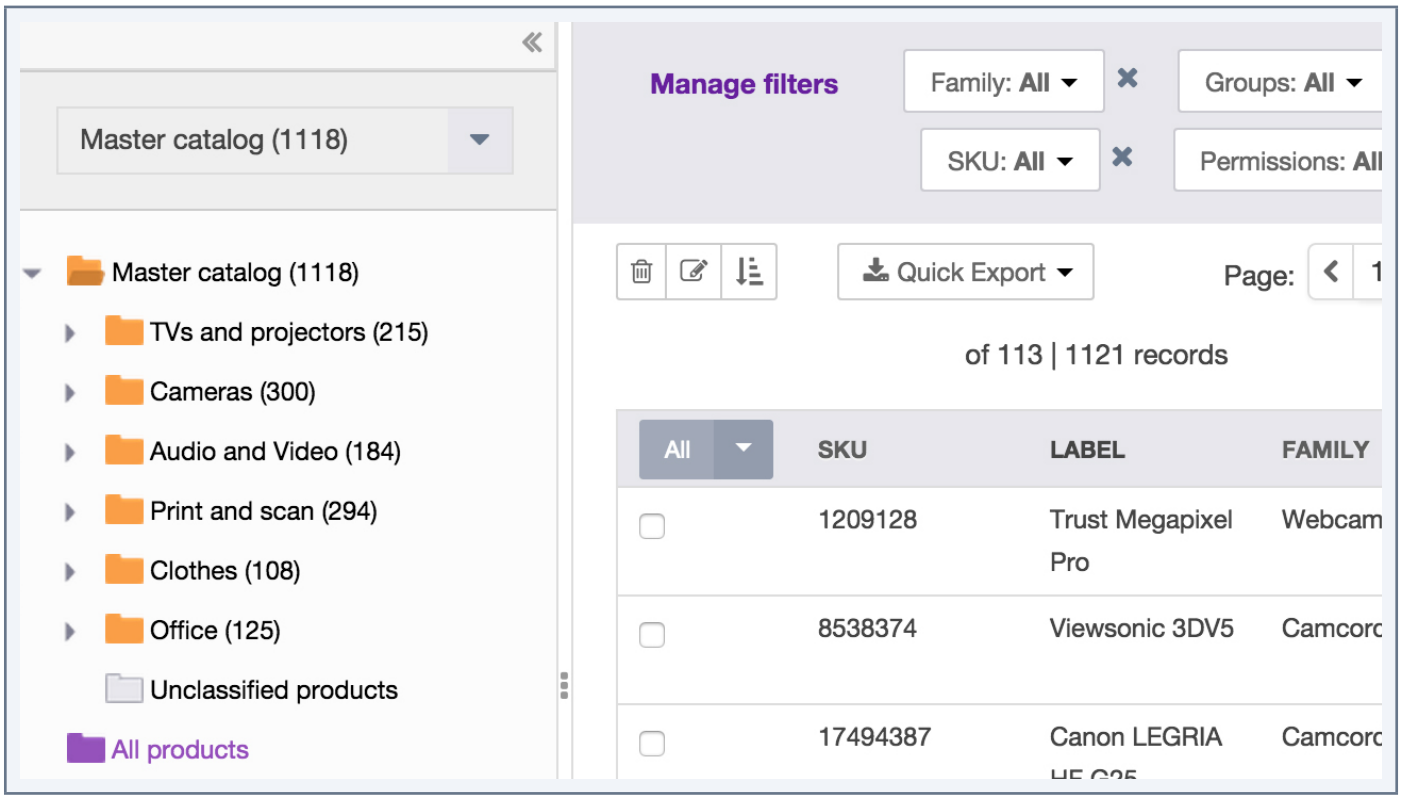
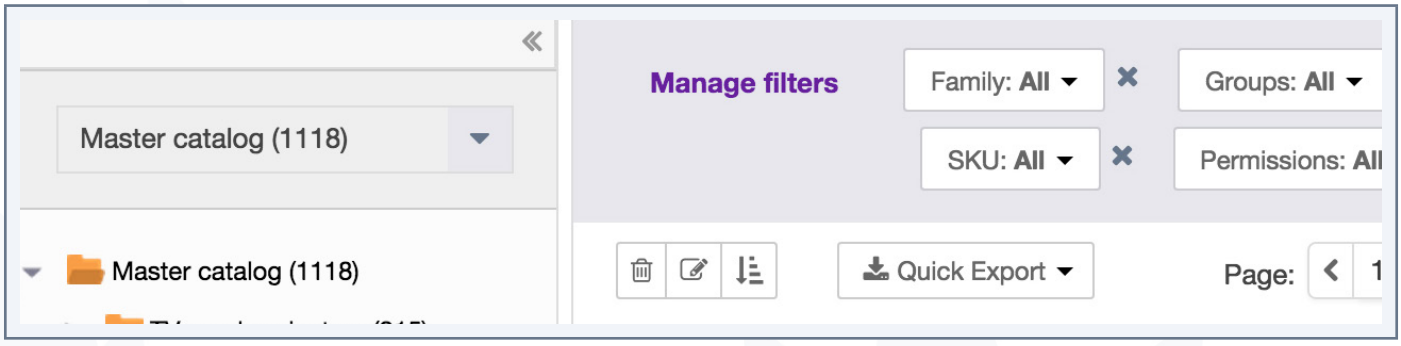
browse the product catalog.



Reduce 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.

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.

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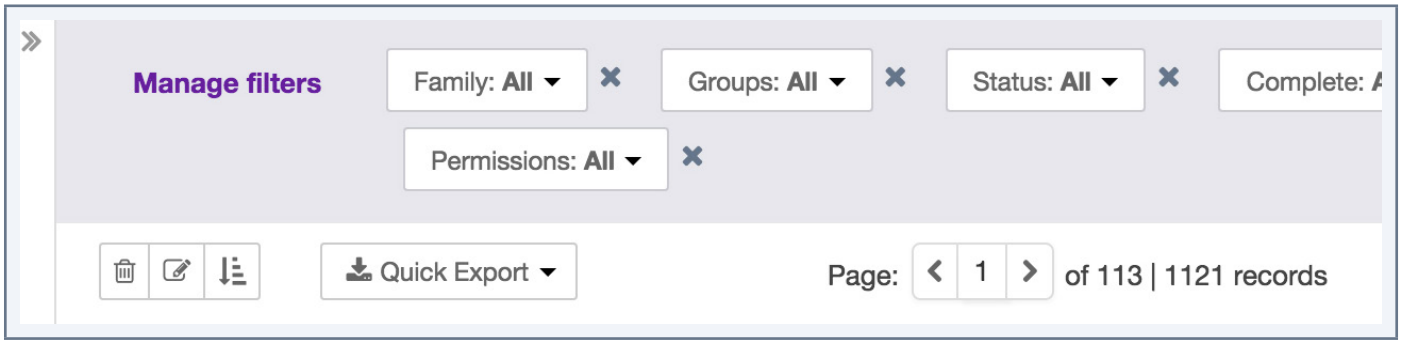

Change the width of the navigation panel per category

When the category name is 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.

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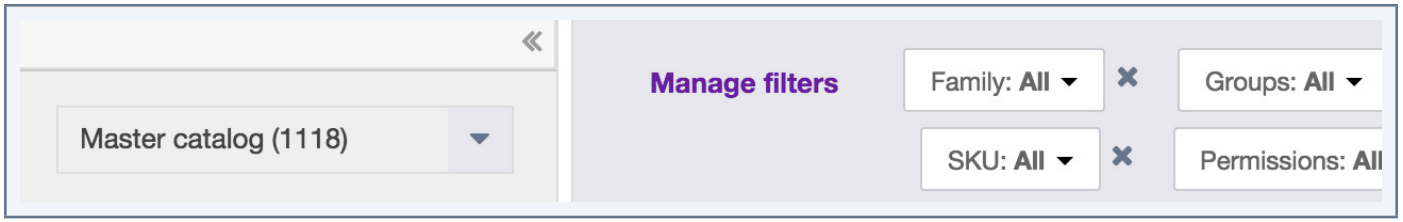
To view a category tree, select the tree to be displayed in the drop-down list at the top of the navigation panel

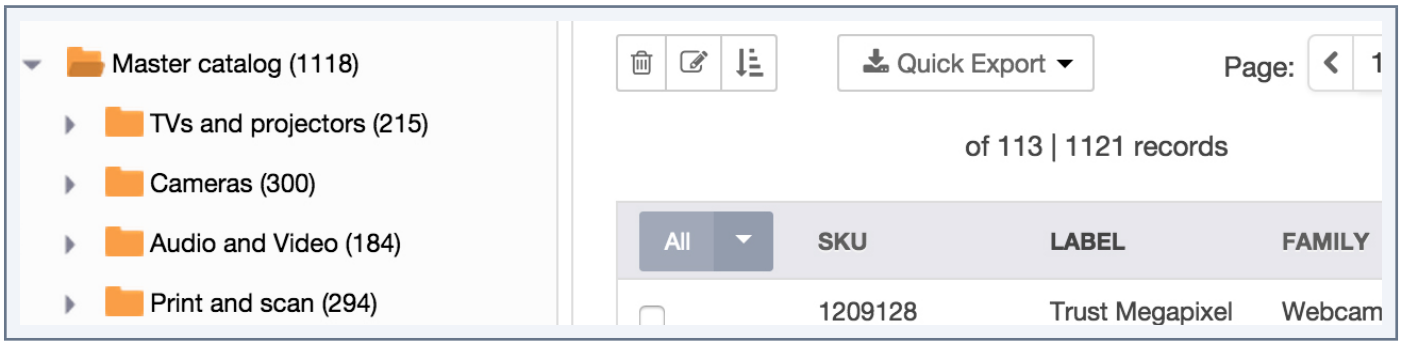


Note

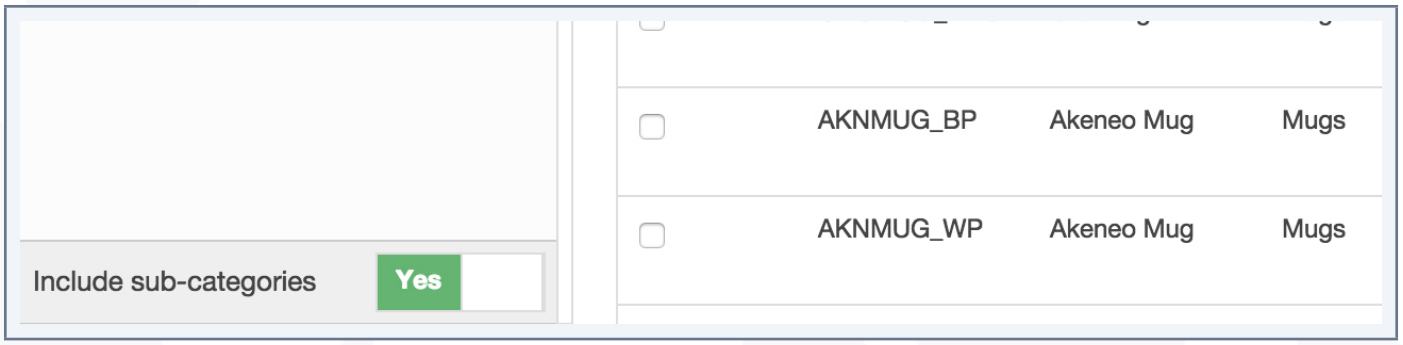
In the Enterprise Edition, if you do not have the rights to see a tree, it will not be part of the list in the drop down menu. In this case, please contact your administrator.

Include subcategories for the product counter per category

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.



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This option takes into account the number of products classified in sub-categories. 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 sub-categories.

Note

In the Enterprise edition, the number of products in the category displays the products on which you have rights to view and publish. The other products are not taken in account.

How to view products according to their classification

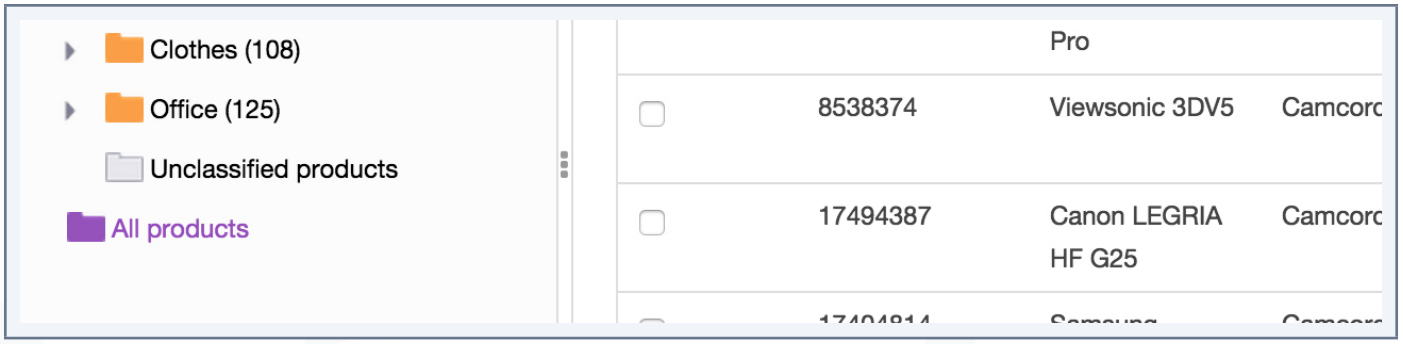
The category panel enables to filter the product grid according to their categorization. To do so, you need to click on the category you want to see the products. The product grid will be then updated.

Note for Enterprise Edition

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

View 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 the products that are not classified in any category of the relevant tree, click on the “unclassified products” category.

View all the products of the catalog

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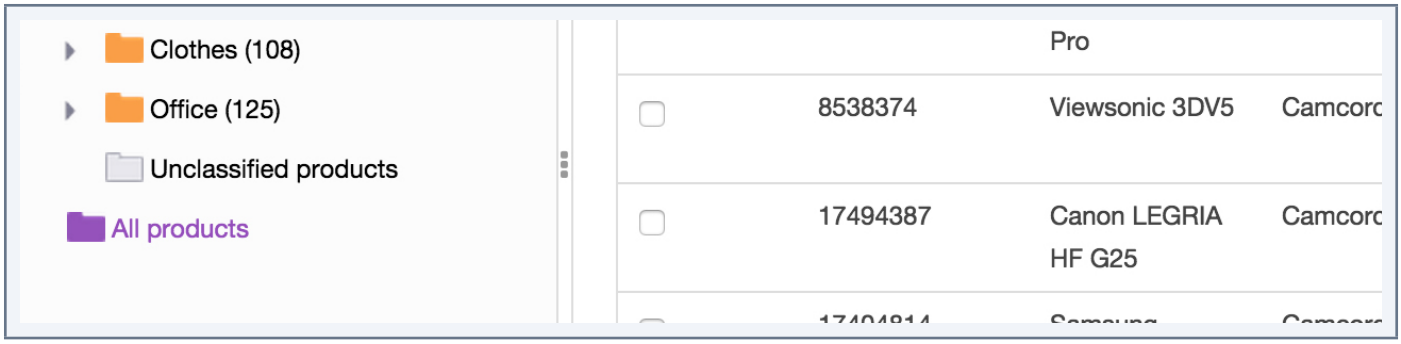
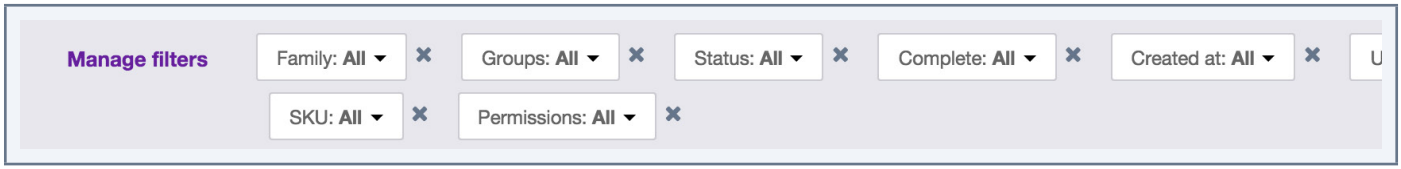
A category is displayed even though there is no tree. The “folder” icon is gray, below the tree if there is one to be displayed. This category named “All Products” is automatically managed by the PIM and cannot be set.



To view all the products of the catalog, click on the category “All products”.

Filters

The product 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 located: 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 product information:

- All the product information managed by the PIM:
  - Family,
  - Groups,
  - Status,
  - Complete,
  - Creation date

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- Last modified
- ID i.e SKU
- Permissions
- Categories

- All the product information managed via the attributes

Enterprise Edition Note

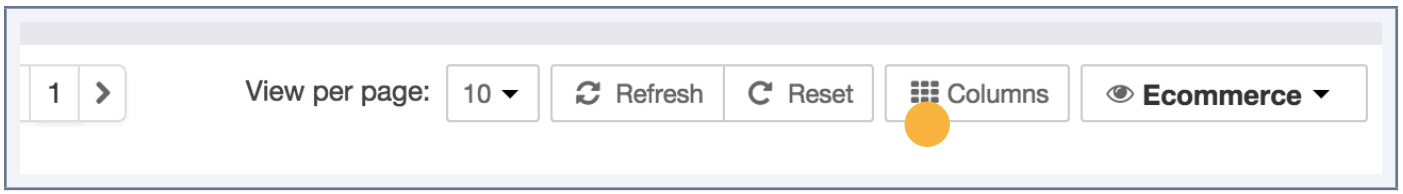
only the attributes that you can view or edit are available in the list of filters in the product grid.

Configuring columns

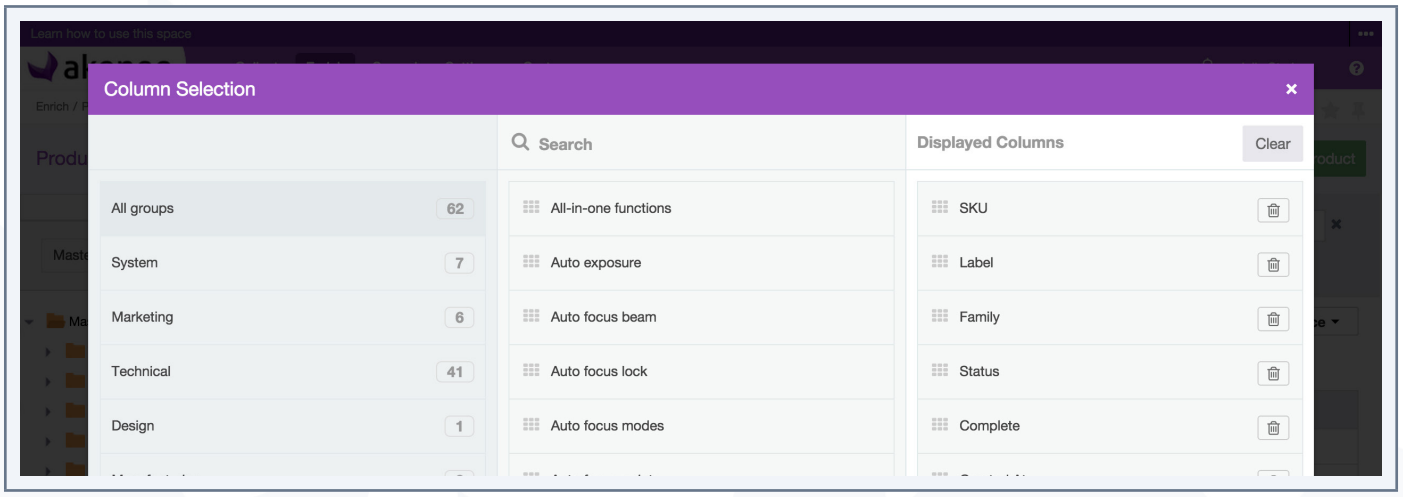
The Akeneo PIM enables you to change the columns order in the product grid to adjust & meet your needs for results viewing.

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: This popin shows on the right-hand side the list of columns currently displayed in the product grid.



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Adding Columns

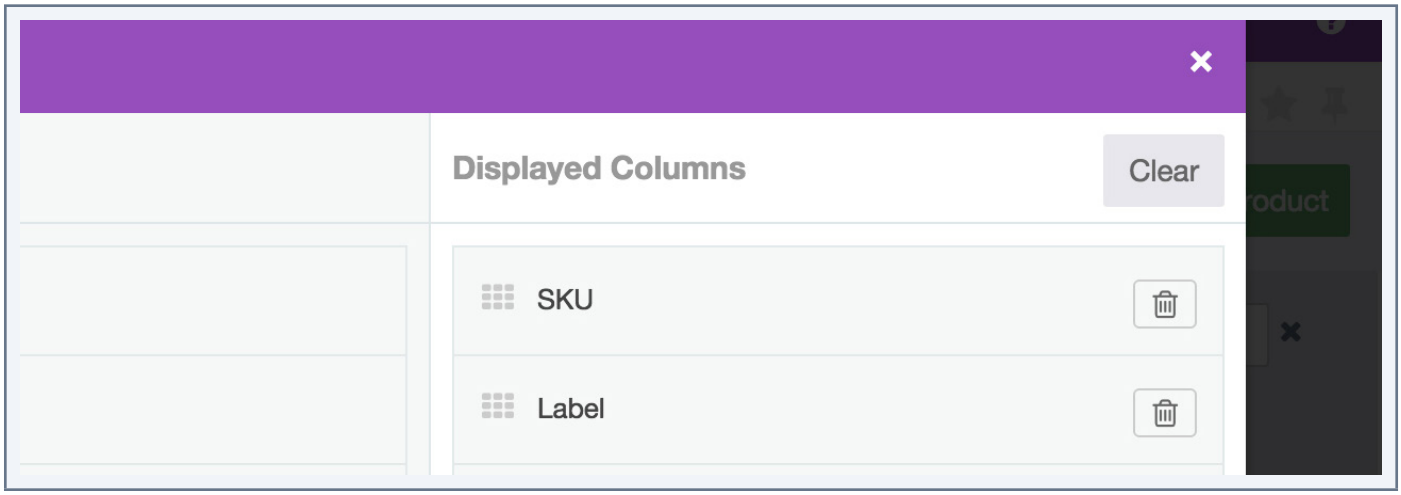
To add new columns

1. Drag and drop the attributes you want to add from the main column to the right column. You have several options to search for attributes:

    - In the left column, you have a list of attribute groups available in the PIM. So you can filter results if you click on a attribute group
    - At the top of the central column, you have a search engine for attributes. So you can start typing the first letters of the label for the attribute you want, the list below will be updated automatically.

Removing columns

You can remove an ongoing displayed column if you click on the “trash can” button on the right-hand side of the attributes in the right column.



You can also remove all the columns to be displayed in the right column if you click on the button “Clear”.

Note

If you cannot find an attribute, it is more likely because you have no right access on the attribute group in which it belongs (permissions included in the Enterprise Edition). Contact your administrator to check your rights on the PIM application.

Sorting out columns

To sort out the columns, drag the attributes in the right column in the popin of the column setting.

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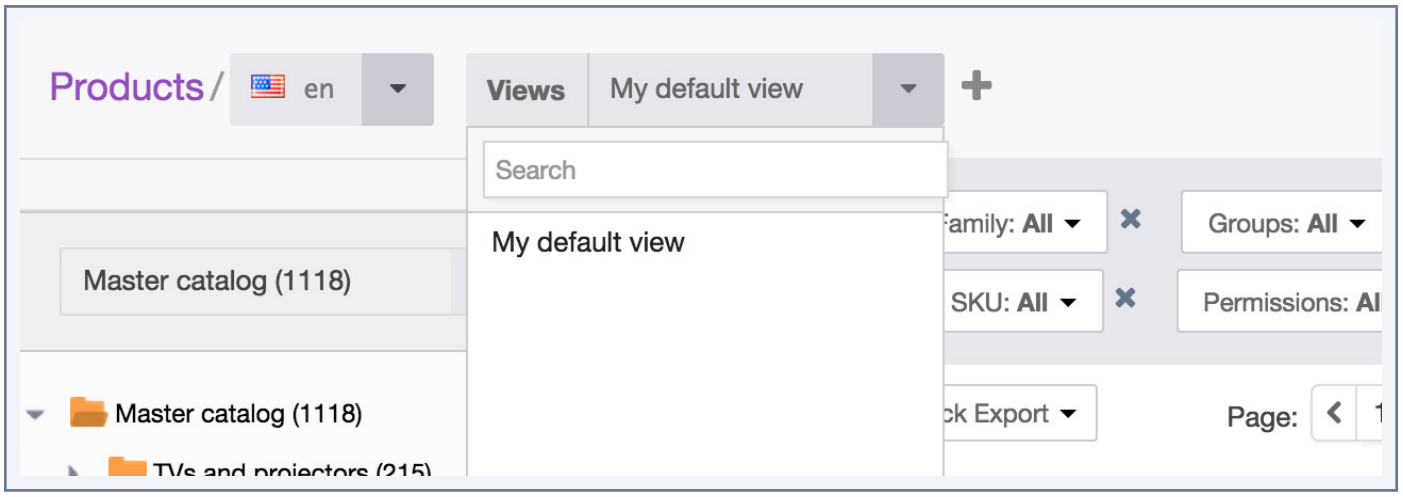
Using the different views

The product grid as long 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 the Akeneo PIM.

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 accordingly updated with the results of the applied filters, and the configuration of the product grid that has been saved.

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

Note

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

Create a view

To create a new view

1. Define your filters and your column configuration
2. Click on the “+/plus” icon next to “My default view” tab

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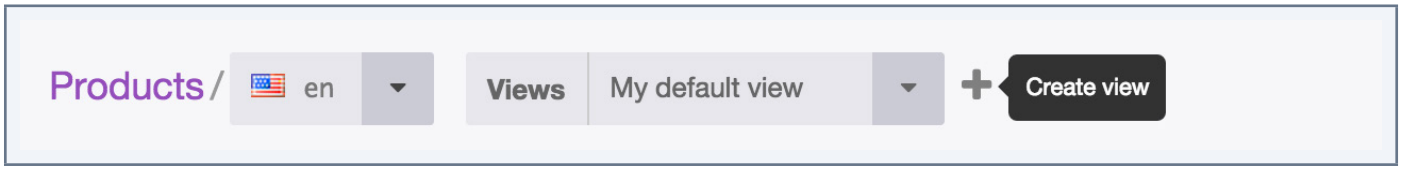
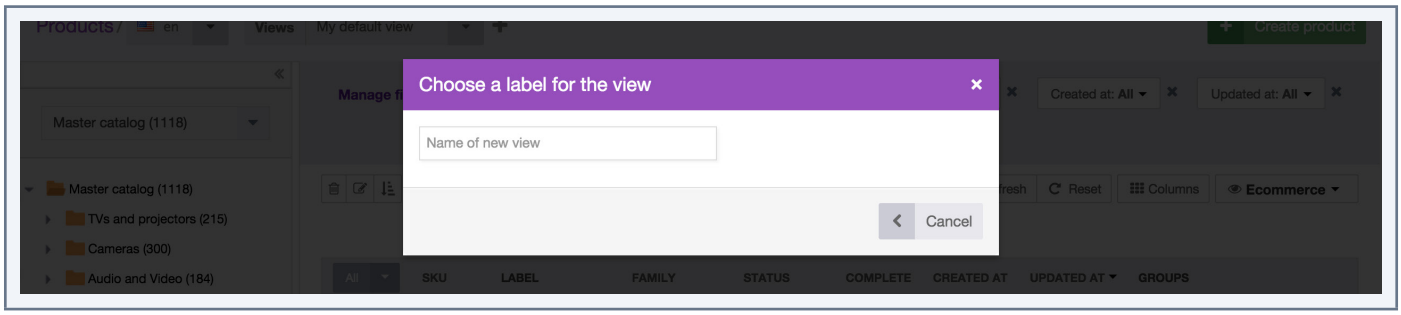


3. The popin for creating a view is prompted. Enter a name for the new view.



4. Click on the "OK" button (it appears only when you have entered a name). Your view is created.

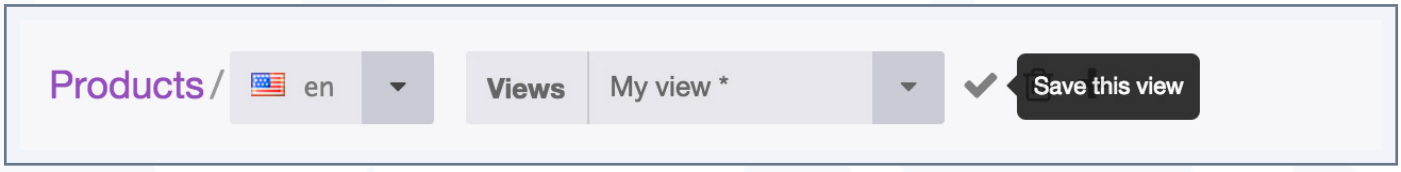
Concerning the views that you create:

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

Update one of my views

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

1. Apply the view that you want to change.
2. Change the filter and / or change the grid configuration. Apply these changes to see the results on the product grid. You will be able then to identify an asterisk next to the name of your view and the "save this view" icon that appears:



3. Click on the "Save" button to update your view with the new changes you just have just defined.

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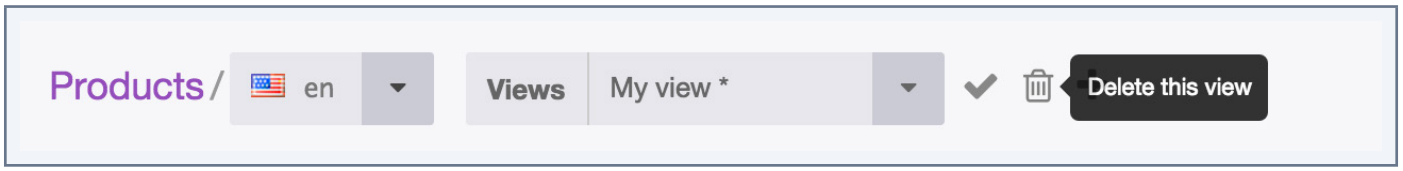
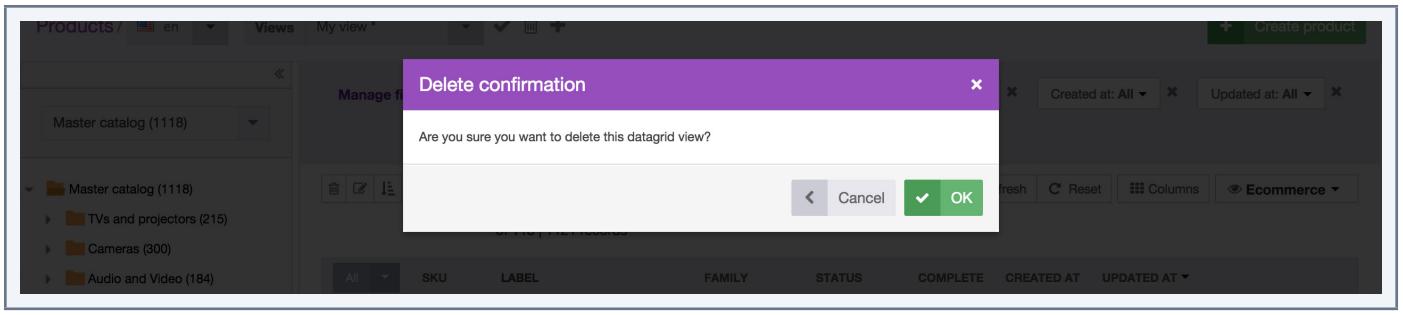
Delete one of my views

You can remove all the views that you have created following the below guidelines

1. Select the view you want to delete and apply the change on the product grid.
2. Click on the “trash can” button next to the list views.



3. Confirm or cancel the suppression of the view.



Once confirmed, the view is permanently deleted.

Apply sort orders

To sort out the products, you can click on the column header in the product grid.

The following information cannot be sorted out:

- the column “label”
- Groups
- Prices
- Multi select attribute type
- Pictures and files

The shortcut actions on the product

The shortcut actions for each product

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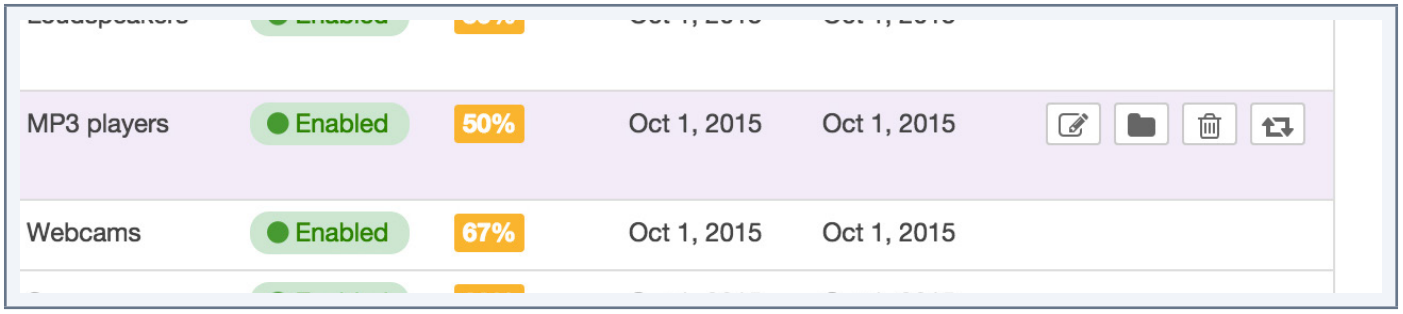
There is a set of actions available for each product that you can find in the last column in the product grid. The buttons are displayed when you hover your mouse over the line.



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

The shortcut actions for a selection of products

If you select products in the datagrid, checking the box in the very left column, it is possible to perform actions on the selection of products directly from the datagrid:

- Delete all the products that have been selected. 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 his action, please refer to the “sequential Edition on products” section.

Create a product

To create a product 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 a product in the PIM

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

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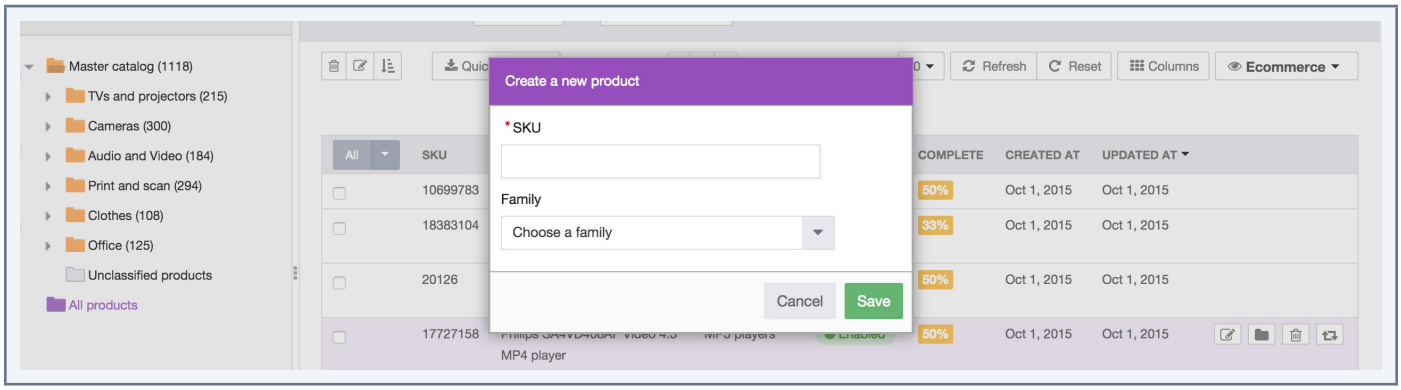
2. Select a family for the new product you create, as well as a unique stock keeping unit.
3. Click on the “save” button.



The product has been created and the page of the “edit”product form is displayed.

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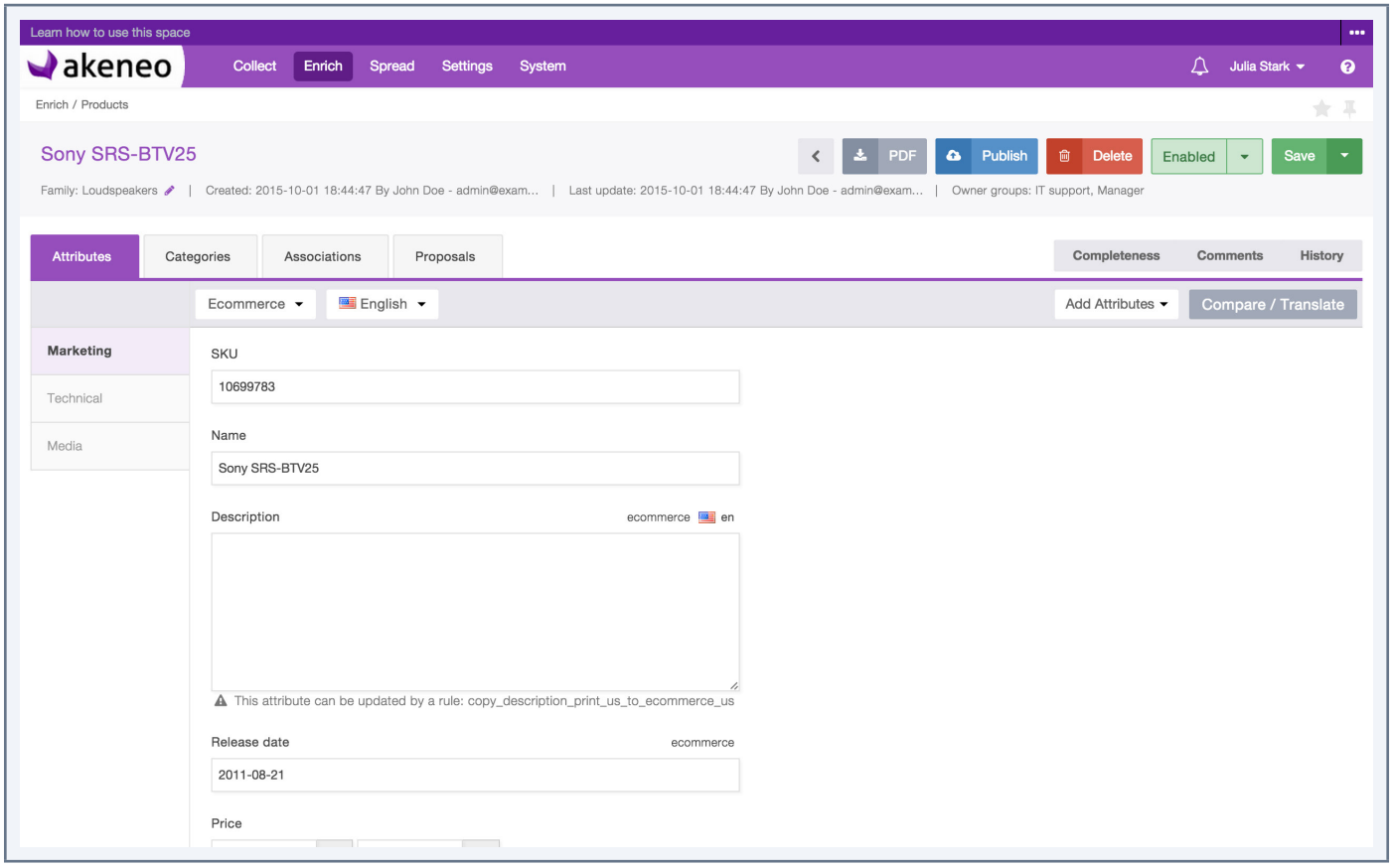
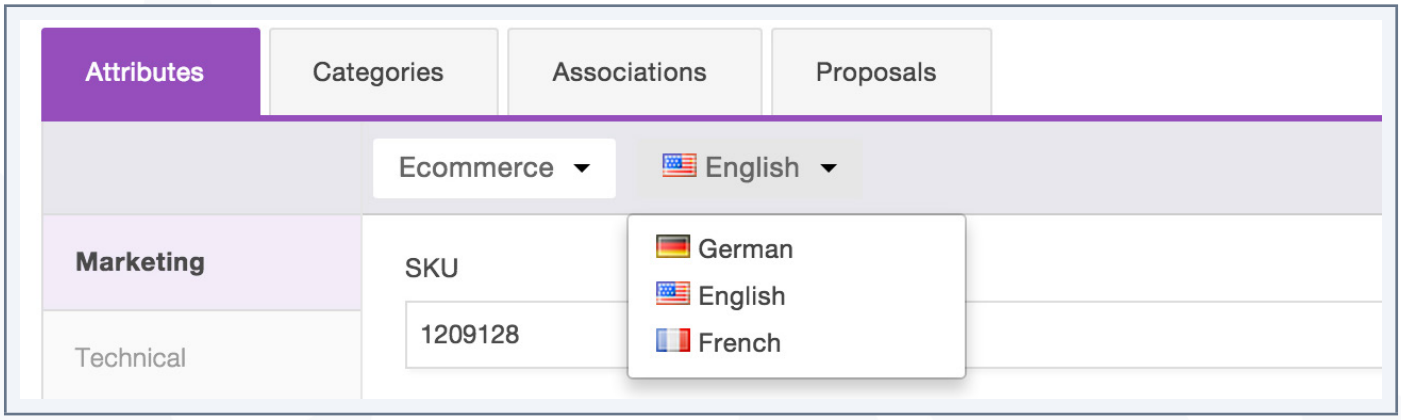
WORKING ON THE PRODUCT DATA



Editing a product

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



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3. Change or complete the information in the appropriate fields.
4. Click on the “Save” button.

The product is updated with your changes, and a new product version is created. You can view it from the “History” tab, if you have the rights to do so.

Note

With the Enterprise version, you might not have the appropriate rights to edit the product for this locale. In this case, please contact your administrator.

Select the working locale

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

- The label of the family in the product header
- The Label of the attribute groups
- The Label of the attributes
- The Label of the categories
- The Label of the associations

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

The localizable attributes for some locales exclusively, 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 in which you want to work.

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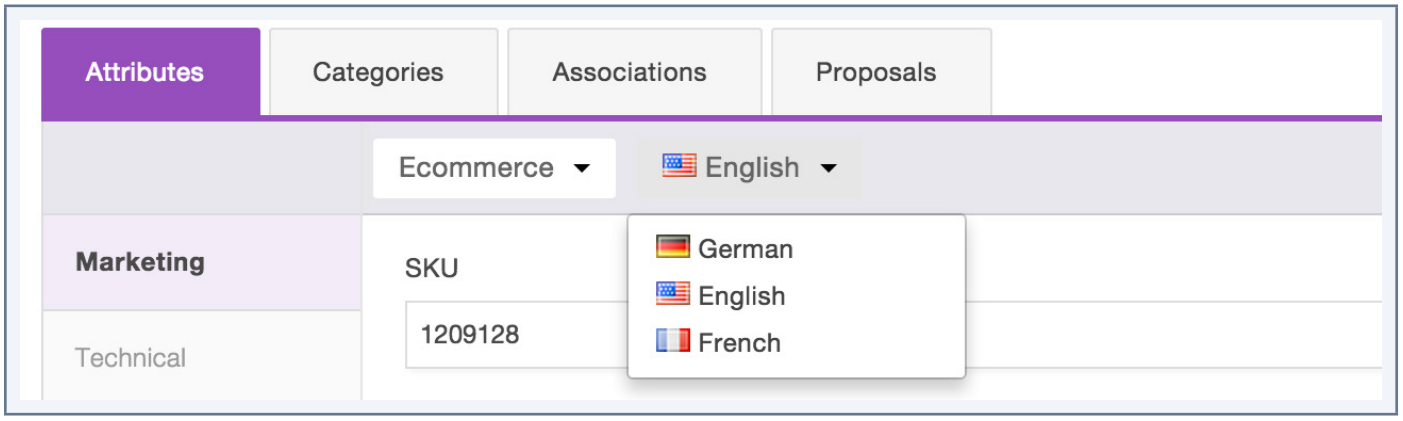


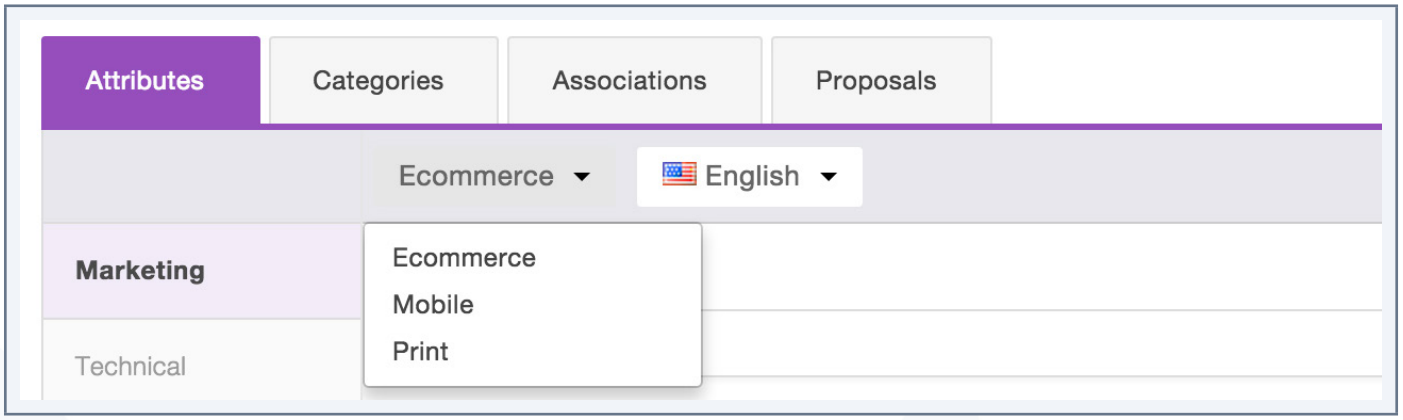
In the drop-down menu, you will find the locales at least those that have been added to a channel. If you cannot find your working locale listed, you have two options:

- 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 required by any of the channels: is therefore not enabled. To add a locale to a channel, please refer to the section “Channel configuration” in the PIM Administrator user guide.

Select the working channel

To select the channel you want to edit

1. Select the channel in the drop down list on top of the product form :



The suggested channels in the list will concern the relevant working channel selected earlier.

Edit several channels at once

If you want to edit several channels at once, you can change the working channel and edit the product infor-

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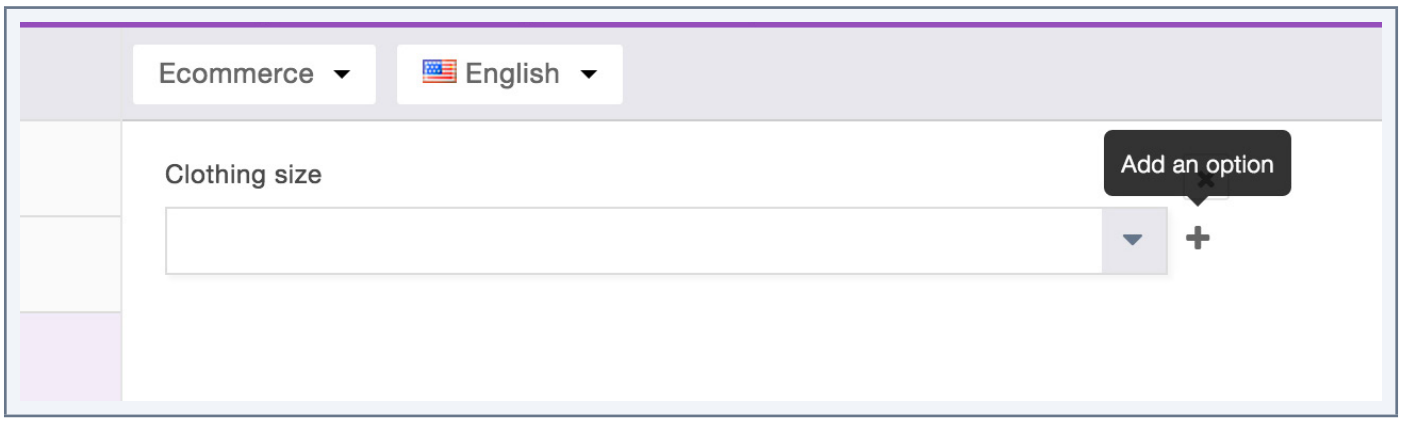
mation for it before saving all your changes.

Add options to select attribute type

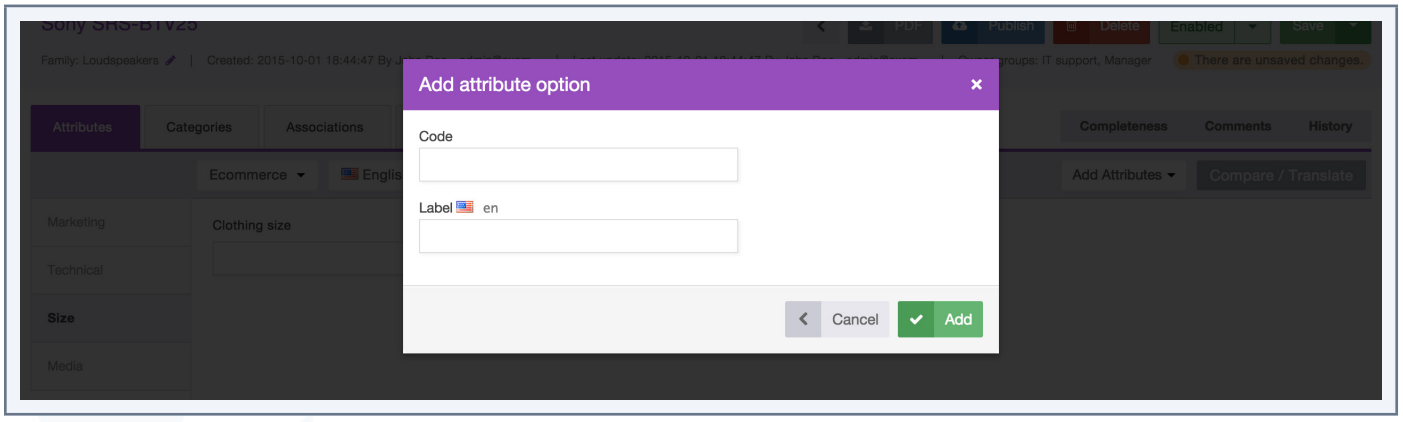
If an option is not present for a select attribute type (displayed as a drop down menu, simple select or multiple choice list with auto completion) you can add it directly from the edit product form.

From the edit product form

1. Click on the “+/plus” button on the right of the attribute



2. From the new popin you will be able to create the new option .



3. Add the code and possibly a label for the working locale.
4. Click on the “save” button to generate the option and add it automatically to the attribute for the product form in progress.

If you do not see “+/plus” button, you might not have the appropriate rights to add an option. In this case, please get in touch with your administrator.

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Add / remove product attributes

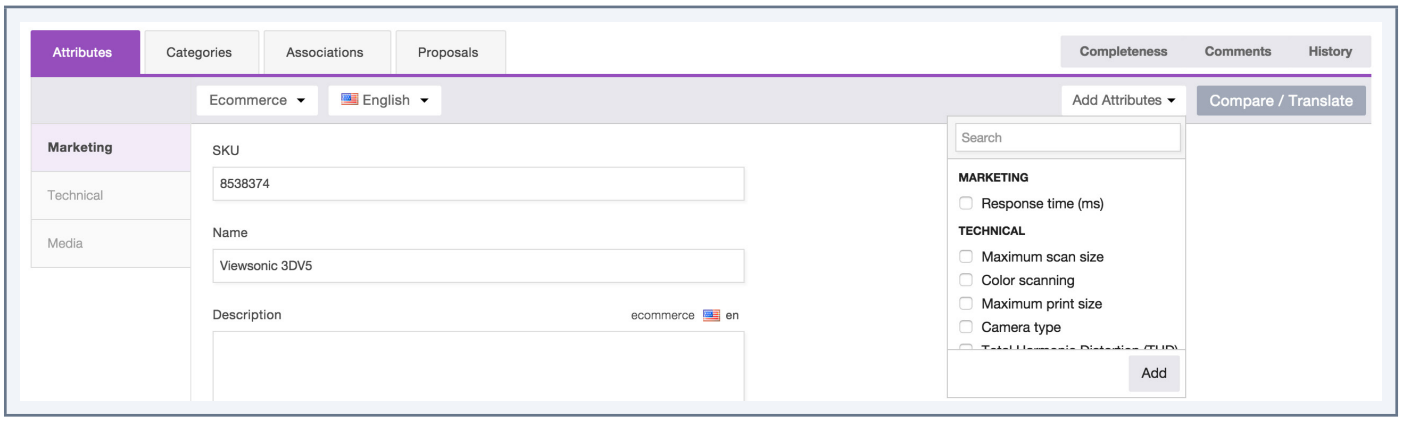
You can add attributes to a product, which are not part of the product family.

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 edit product form

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



2. Select the attributes you want to add to the product form from their labels.
    - You can search for an attribute by its label using the quick search box above the list.
    - You can select all the attributes of a group by clicking on the label of the attribute group.
3. Click on the “Add” button below the list.

The attributes are then added to the product form in progress.

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

These attributes can also be removed from the product form in progress by clicking on the cross to the right of each attribute added.

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If you are not able to see the cross on the attributes manually added (it is not possible to remove attributes inherited from a family), you might not have the appropriate rights to remove attributes that have been manually added. In this case, please get in touch with your administrator.

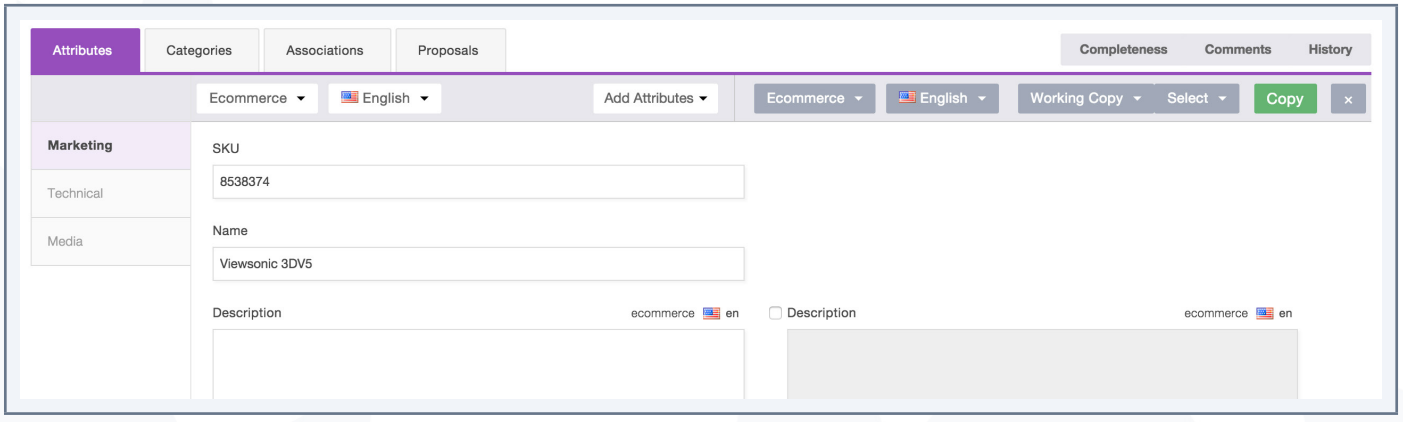
View product information from another locale and/or channel

From the edit product form, it is possible to view the values of the product in another locale/channel, to assist capturing the data on an ongoing work, like for instance when translating the product form, or retrieving the product information coming from another team (you are in the ecommerce 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 / edit the product form that you need to translate
2. Select the locale to be edited
3. Click on the button “copy / translate” on the right of the form.
4. Select the locale to display in the dropdown menu at the top-right of the form.

The localized values are displayed on the right of the product form.



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The values on the right cannot be edited but can be viewed.

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

Copy product information from a locale and/or a channel

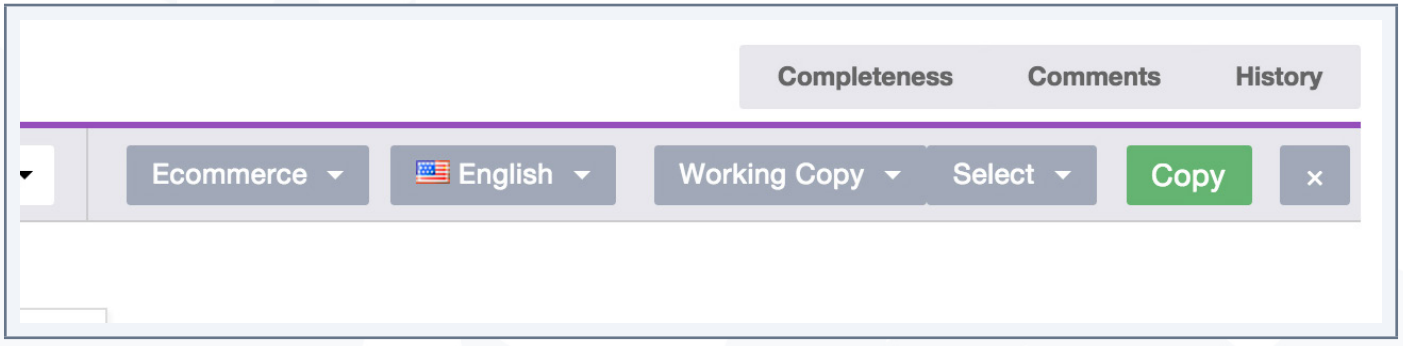
When a locale is displayed for convenient reference in the product edit form (refer to the section View product information from another locale) you will be able to copy the values in the product form.

To copy the product information from a locale

1. Follow the guidelines on How to view product information from another locale ?
2. There are multiple option values that can be selected from the select drop down menu on the top the Attributes tab:

- With the option “All”, you will able to select all localized values of the local reference;
- With the option “Current tab”, you will able to select all the displayed values of the group attributes;
- With the option “None”, you will be able to deselect all the localized values of the locale reference .

3. Click on the “Copy” button.The selected values are copied to the edit product form:



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Viewing the product versions

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

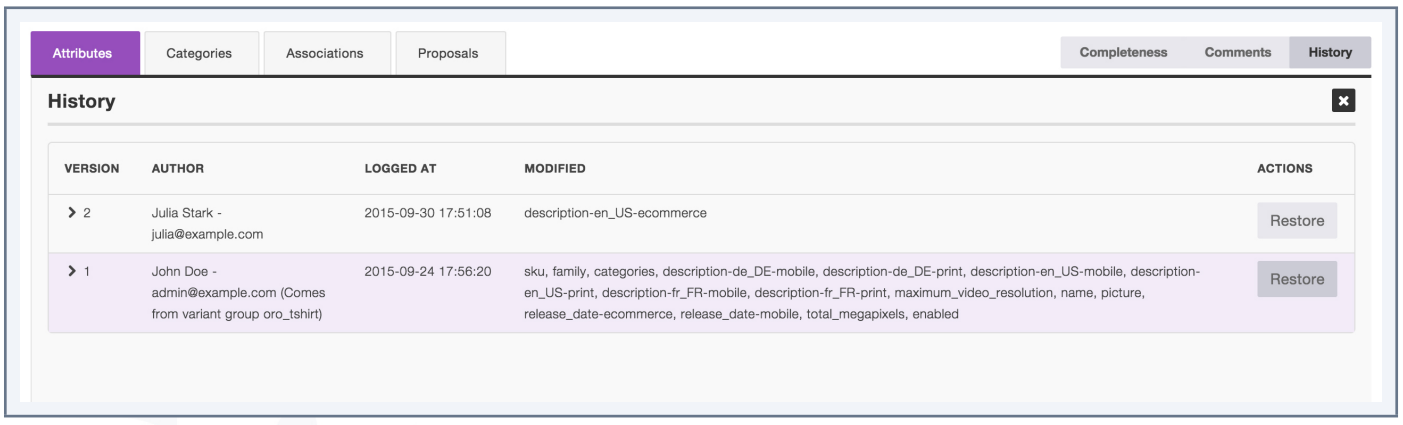
- Changes of attribute values in the edit product form
- Changes on the product status (enabled / disabled)
- Changes on family
- Association changes
- Changes on categories
- Changes on attribute groups

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

- The author or system that generated 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 edition page.
2. Click on the “History” tab: you will be able to see the whole list of versions.



Checking the product completeness

In the Akeneo PIM, a product is considered as complete if it has enough values to be exported to a given channel.

The completeness for a product can be defined according to several aspects:

- According to a family: for instance a product from the family “TV” will not have the same information

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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 needs 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:

1. Open the product page to be reviewed (edit or review)
2. Click on the “Completeness” tab. A table will recap the completeness of the product according to the channels and the activated locales.

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

The list of missing attributes is displayed above the progress bar. When clicking on the label of the attribute, the form will change to put the focus in the field of the attribute so that you can complete it directly.

Gentle nudge reminder, for a product to be exported to a channel:

- it should be complete for a channel / locale combination
- it must be enabled
- it should be classified in a tree category of the relevant channel.

Commenting on a product

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

Comments are available in the “Comments” tab in the edit product form.

Adding comments

1. Open the edit product form for which you want to leave a comment
2. Click on the “Comments” tab
3. In the text field, type your comment (there is no length restrictions).

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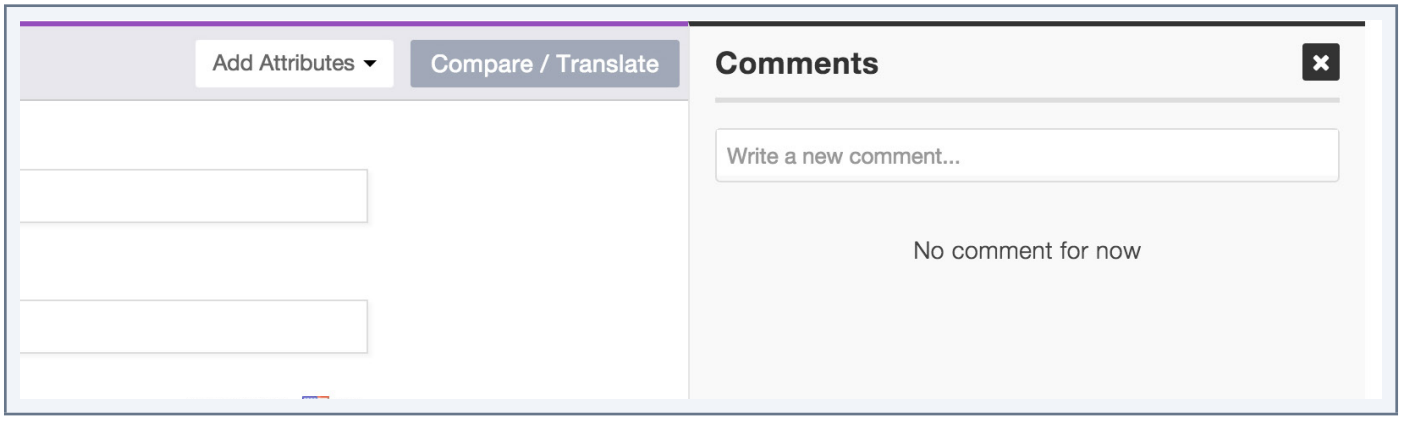
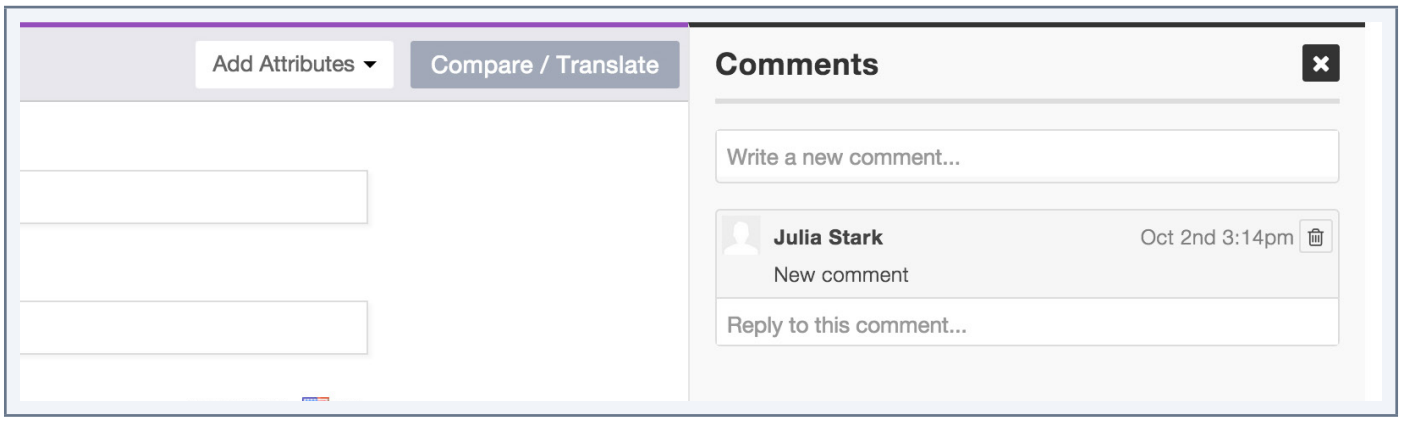
4. Click on the “add a new comment” button



Note

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



Replying to a comment

You can reply to all comments on a product

To reply to a comment

1. Hover your mouse over the comment you want to reply.
2. Click on the reply icon (back arrow), which appears on the right of the comment.
3. A new text box will be prompted for you to leave your note. Then click on the “Reply” button to have your new comment saved.

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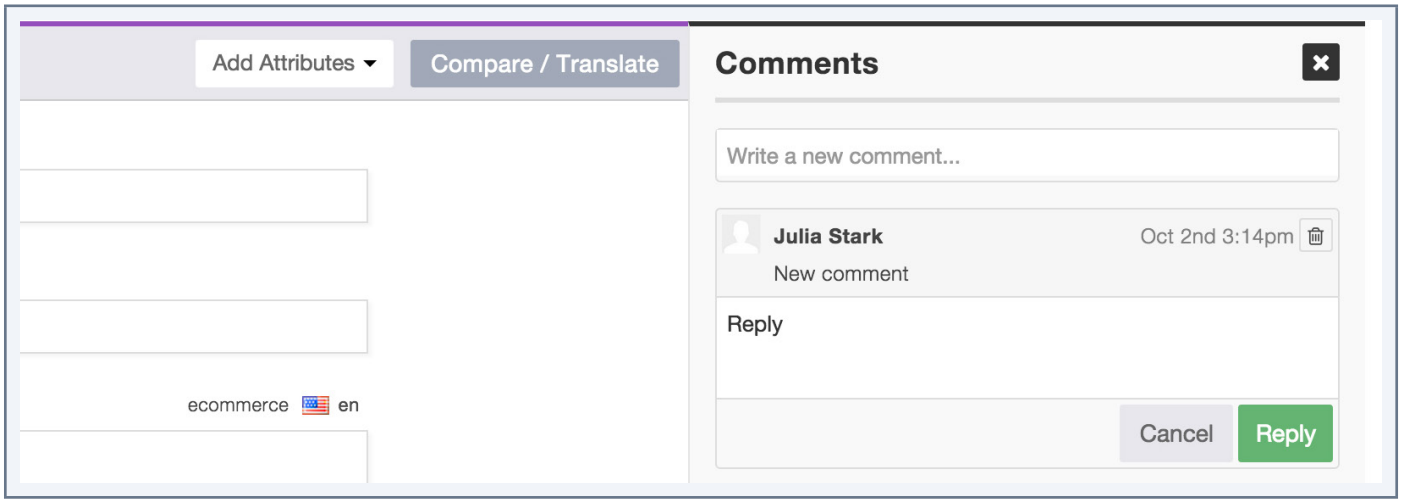
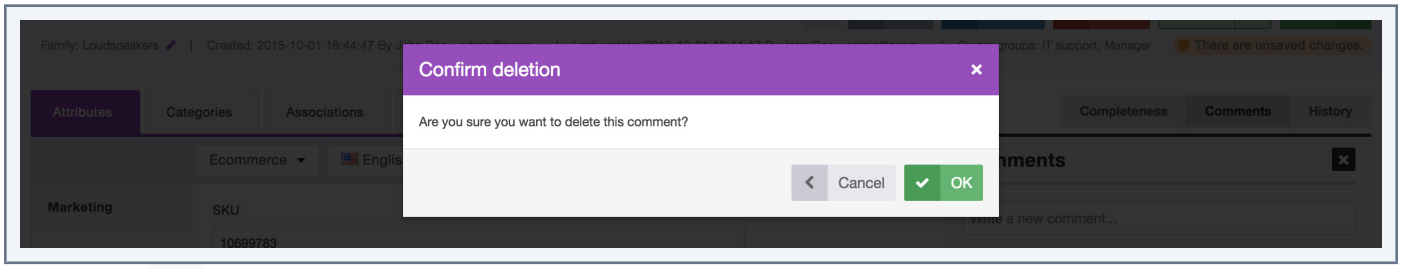


Delete your comments

You can delete only your own comments

To delete a comment:

1. Hover your mouse over the comment to be deleted.
2. Click on the trash can icon which is prompted.
3. And confirm you want to delete the comment clicking on the “OK” button in the popin.



Classify a product in categories

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

Check in which categories the product is classified

You have 2 ways to proceed

- Via the “edit product” form:

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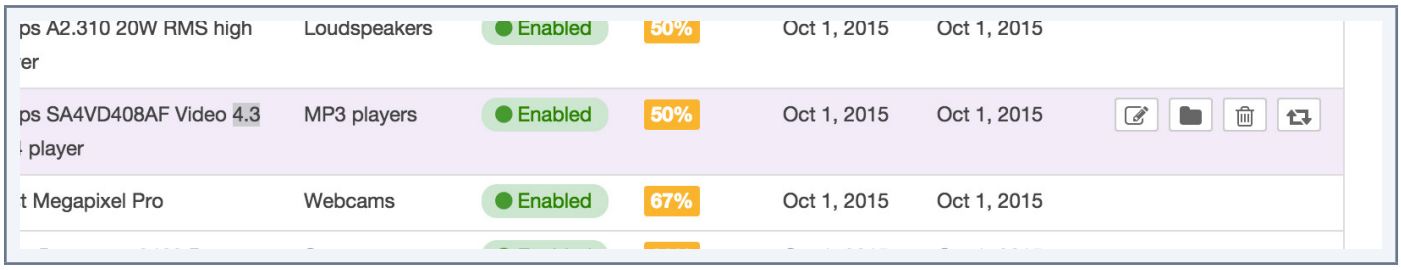
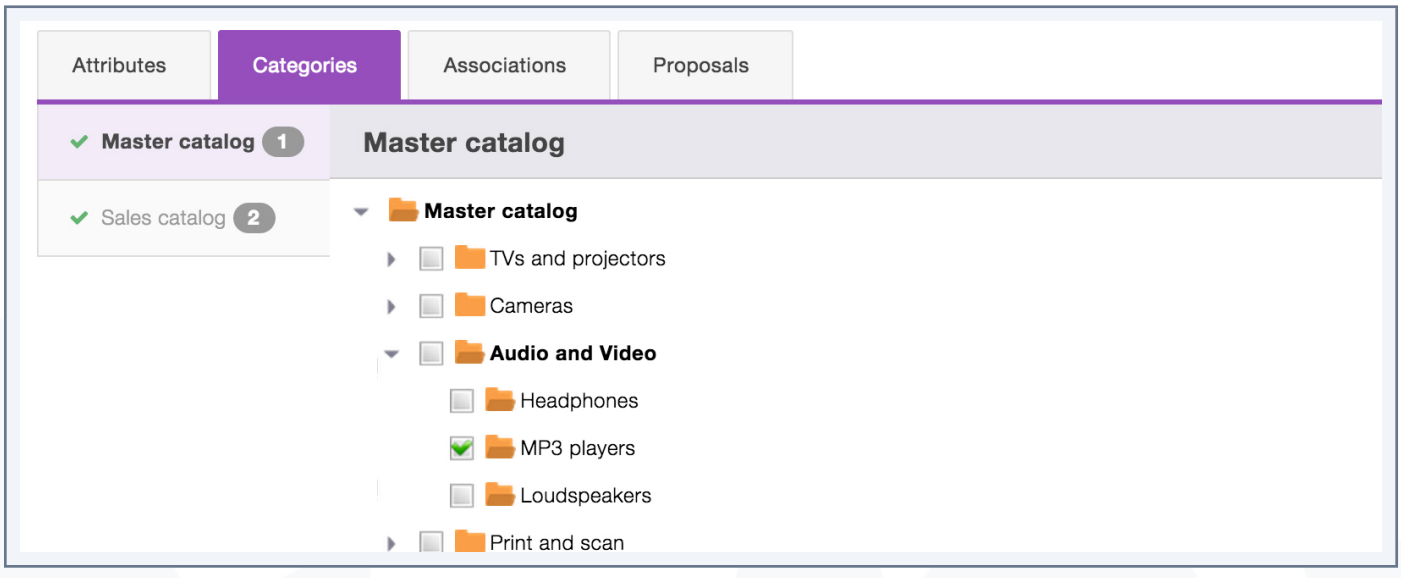
1. Open the product form that you want to classify in categories
2. Click on the "Categories" tab
3. Click on the name of a tree on the left to be displayed

- Via the shortcut in the grid
  1. Identify the product for which you want to see the product classification in the grid.
  2. Hover your mouse over the product line in the grid, then the category button will be displayed



3. Click on the button "Classify the product". The product category tab will be displayed.
4. Click on the name of a tree on the left to be displayed.

The green icon in front of the name of the tree shows that the product is classified in these trees. On the right-hand side of the name of the tree, the figure in brackets shows the number of categories in which the product is classified. The first tree is displayed and only on the part where the product is classified is expanded. The categories in which the product is classified are checked.



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Classify / declassify a product in / from categories

To classify a product

1. Open the edit product 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 product has to be classified
5. Uncheck the categories in which the product should no longer be listed.
6. Then click on the “Save” button.

Link products

A product may be associated with no product or several other products or product groups. This type of relationship has a direction: Product “A” -> Product “B”and Product “A” -> Product Group ”G”. The Product “B” and the product group “G” have no associations with the product “A”.

Note

This type of relationship enable to define relationships of product alternative or substitution between the products for example.

View the links of the product

To review the association types

1. Open the relevant “edit” product form
2. Click on the “Association types” tab
3. Click on the name of a tree on the left-hand side to be displayed
4. Click on the “Show groups” button on the right-hand side of the tab to display the grid of the product groups.
5. Click on the “Show products” button on the right-hand side of the tab to display the product grid.

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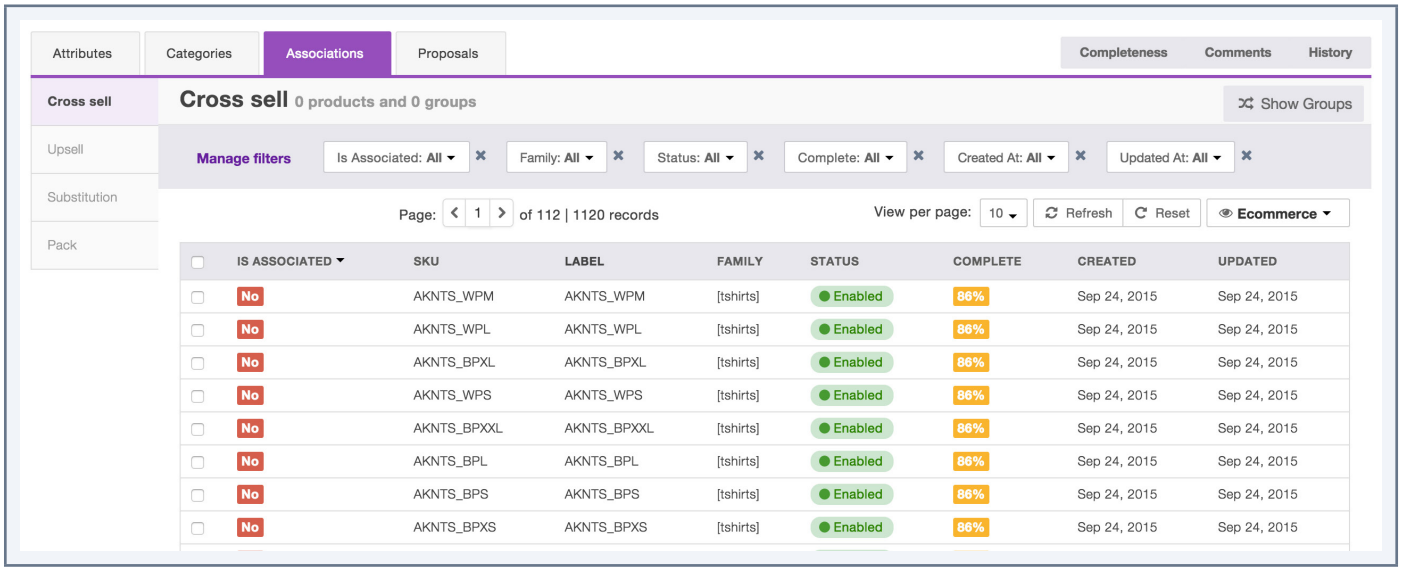
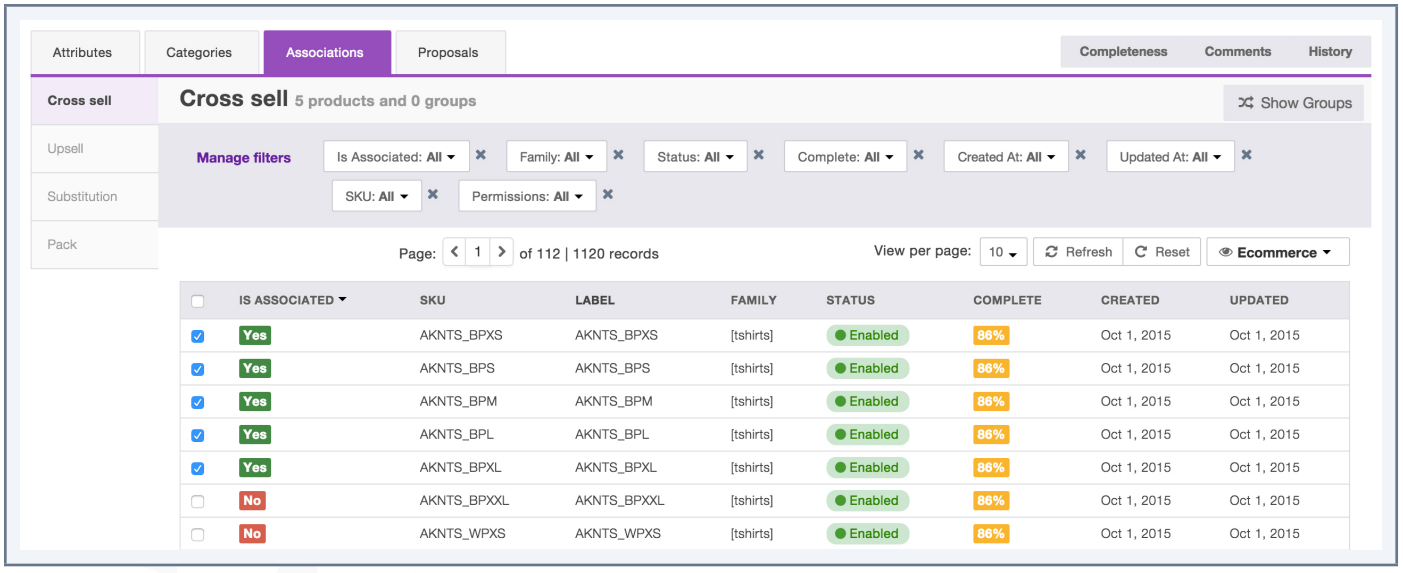


The green icon in front of the name of the association type shows that the product has at least one association with another product or group of products. On the right-hand side of the association type name, the figure in brackets shows the number of this association type the product has. The first type 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 second column of the grid. The boxes are also checked.

Add / remove associations to / from a product

To classify a product

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1. Open the product form you want to link to other products or product groups.
2. Click on the “Associations “tab.
3. Click on the name of a type of association on the left-hand side for the grid to be updated.
4. Identify the products or the group of products in the grid and check them.
5. Uncheck the products or the group of products that you no longer want to associate with the relevant product.
6. Then click on the “Save” button.

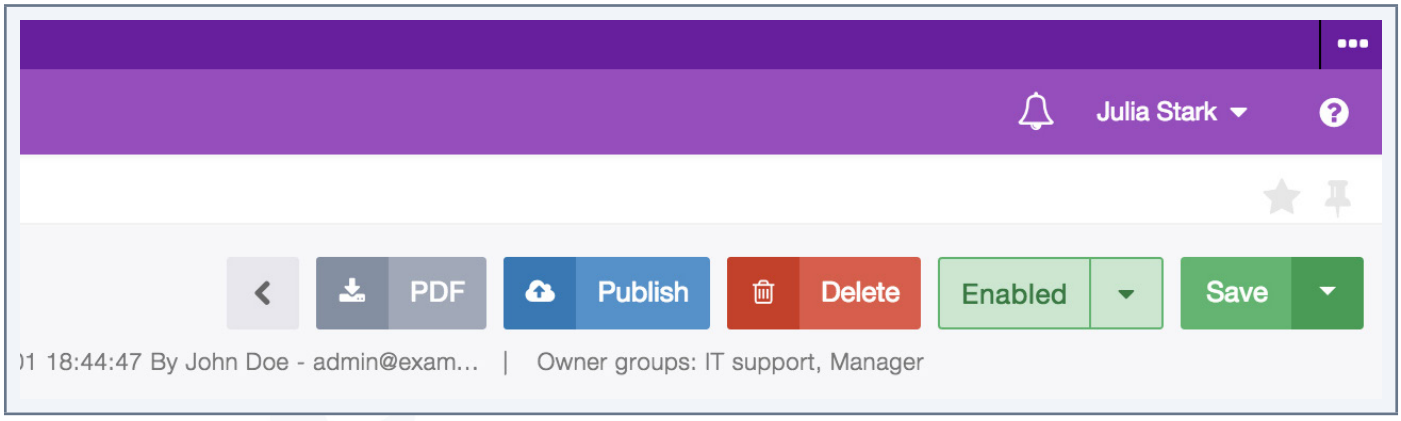
Change the status of a product

The status of a product enables it not to be taken in account for export, regardless of its status (complete and classified). Thus a product with the status “disabled” will no longer be exported via the export scenarios.

By default, note that a product is “enabled”.

You have two ways to proceed to change the product status:

- via the “edit” product form :
    1. Open the edit product form you want to change the status
    2. Click on the “Disabled” or “Enabled” in the product header



    3. Click on the “Save”
- via the shortcut in the product grid:
    1. Identify the product you want to change the status in the product grid
    2. Hover your mouse over the product line in the grid, the change status button is prompted

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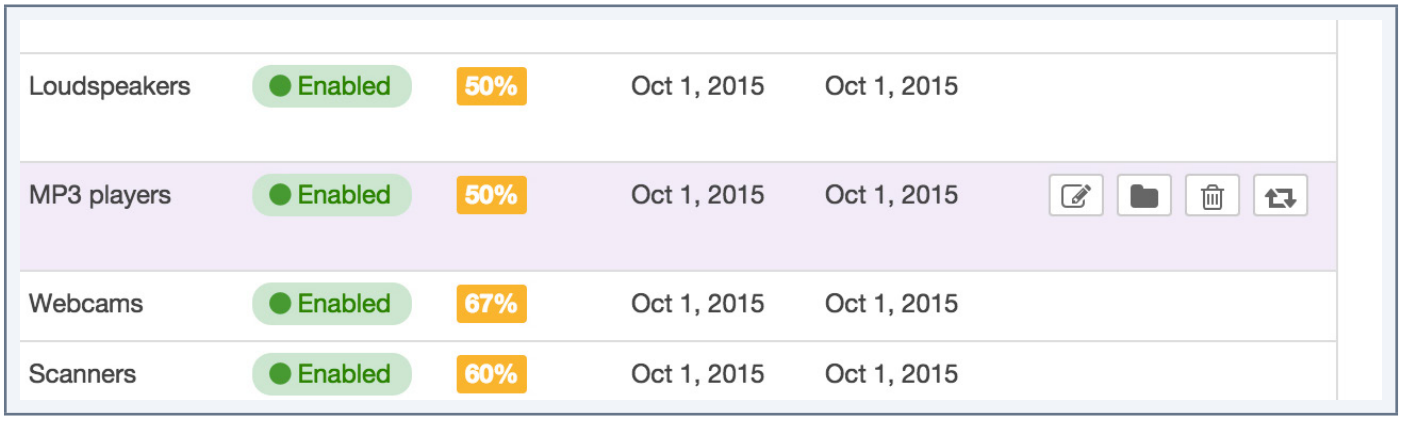


3. Click on the change status button, the product status is updated.

Generate a PDF from a product form

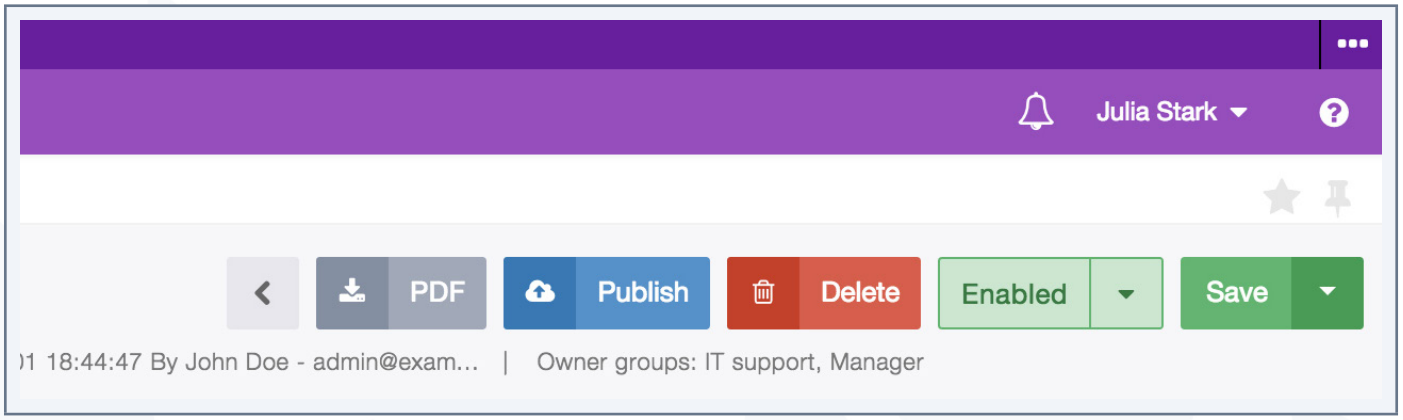
A PDF file can be generated on demand, including all the product information

Note: for the Enterprise version

the content of the PDF file corresponds to the working copy of the product form.

To generate a PDF file from a product form

1. Open the product form on which you want to generate a PDF file
2. Click on the "PDF" button in the product header.



The PDF file downloads automatically from your web browser

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Note

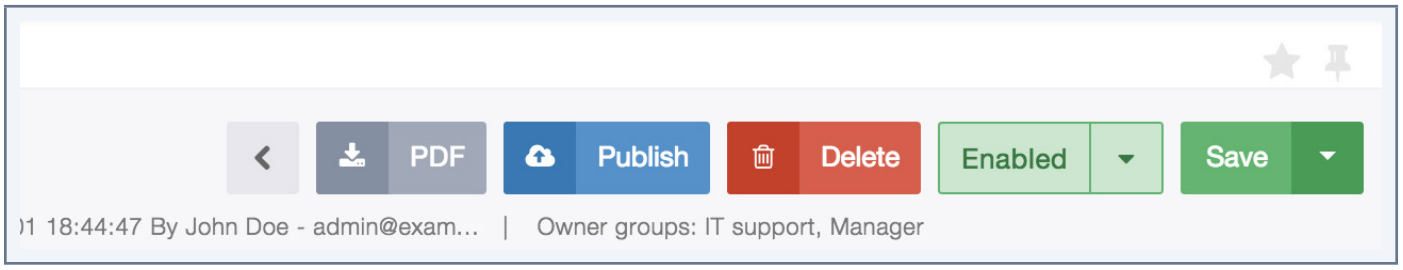
You will be able to modify the way the PDF file of the product form is presented via an integrator. You can contact the integrator to have the changes done.

Delete a product

A product can be removed from the PIM. This means that all the relevant product information will be deleted in the PIM. This action cannot be reverted:

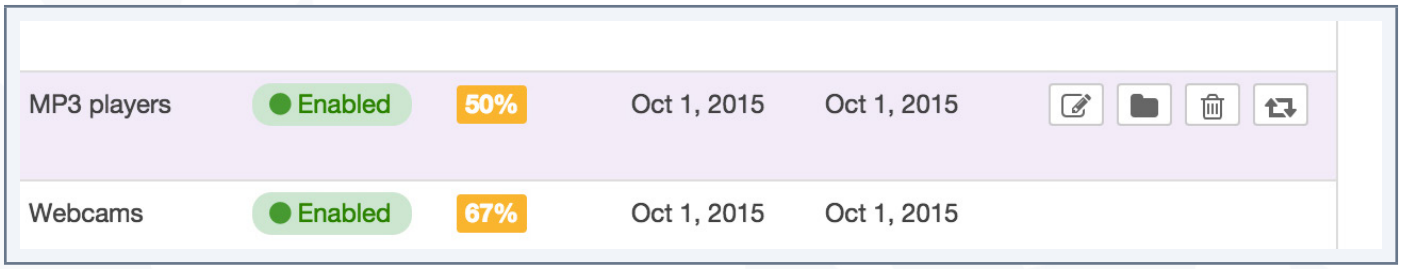
You have two ways to proceed to delete a product:

- via the “edit” product form
    1. Open the “edit” product form you want to delete



    2. Click on the “Delete” button in the product header page
    3. Confirm the action in the popin

- via the shortcut in the product grid
    1. Identify the product you want to delete from the product grid.
    2. Hover the mouse over the product line in the grid, a trash can icon is prompted



    3. Click on the “Delete” button.

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4. Confirm the action in the popin.

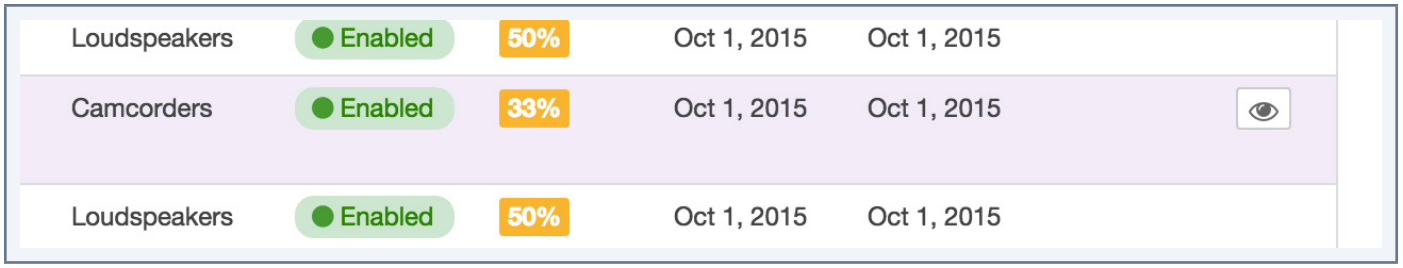
The product and all its information will be deleted from Akeneo PIM.

Consult a product (EE)

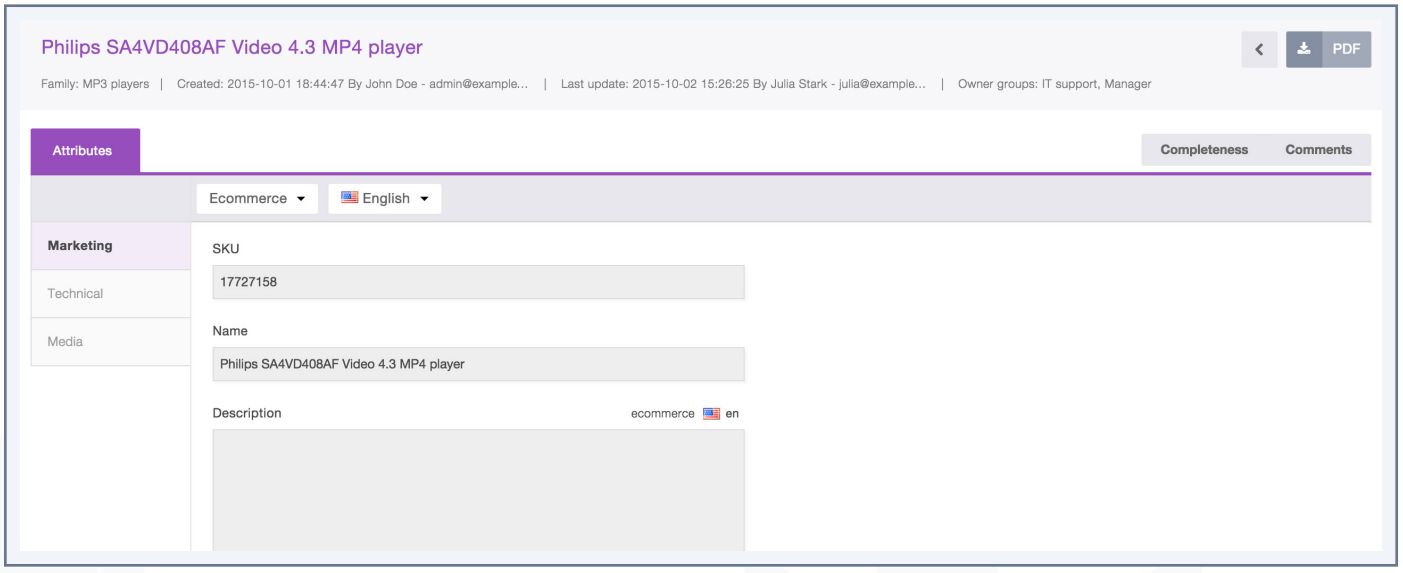
With the new system of rights in the Enterprise version, you can view a product page without editing it.

View a product without editing

From the Enrich> Products menu, you will be able to do so via the shortcut available in the grid, in the last column.



If you do have the edit permission for 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 “edit” product form: it is possible to change the locale of the viewing page of the product information. Two tabs are shown: Attributes and Completeness.

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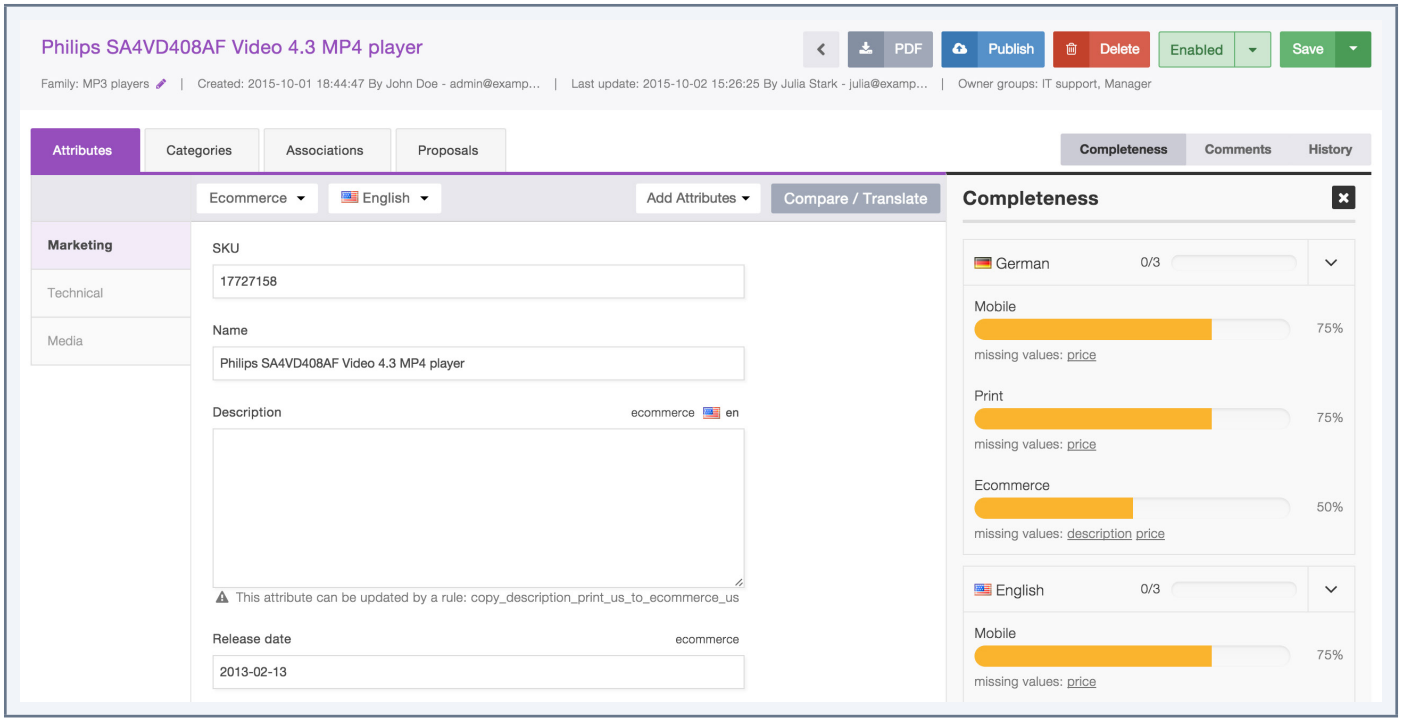
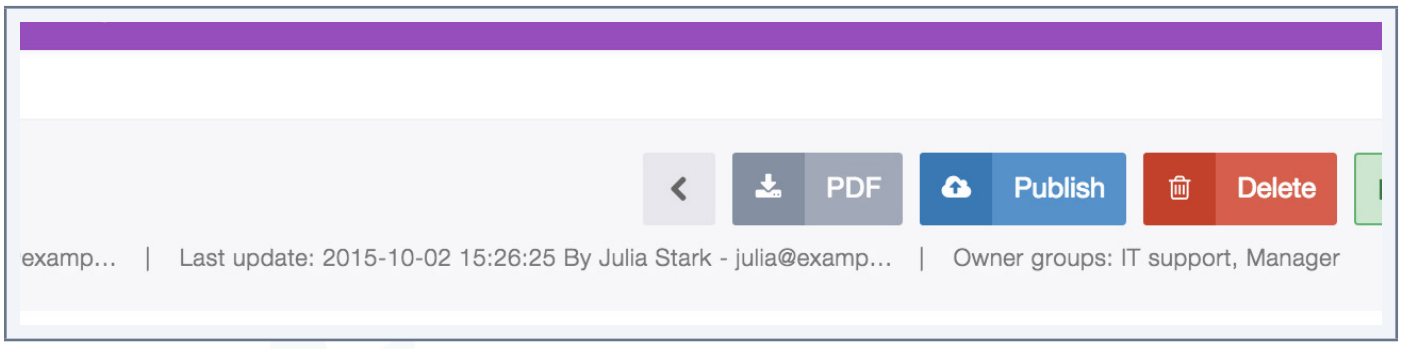
The completeness of the product is shown in the “Completeness” tab in the same way as in the product edition mode.



To go back to the product grid

The button on the right hand side 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, it is always the “edit” product form that is displayed.

Collaborate on a working copy of the product (EE)

Open the edit page

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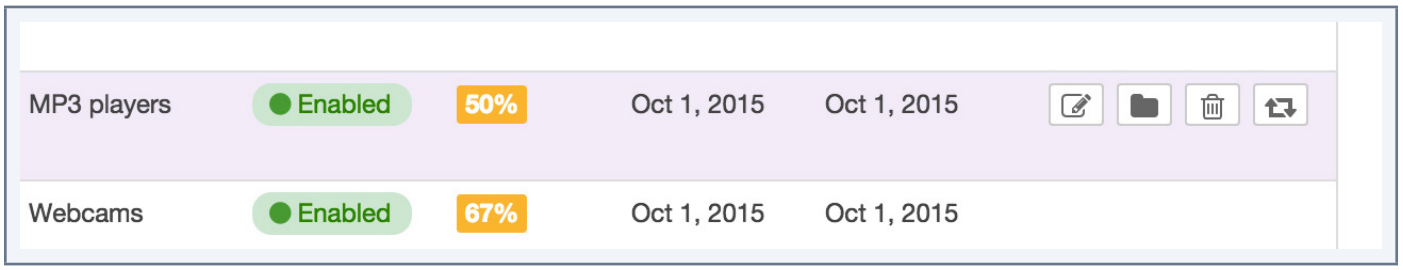
In Enrich> Products, the product editing page is available using the shortcut in the grid in the final column:

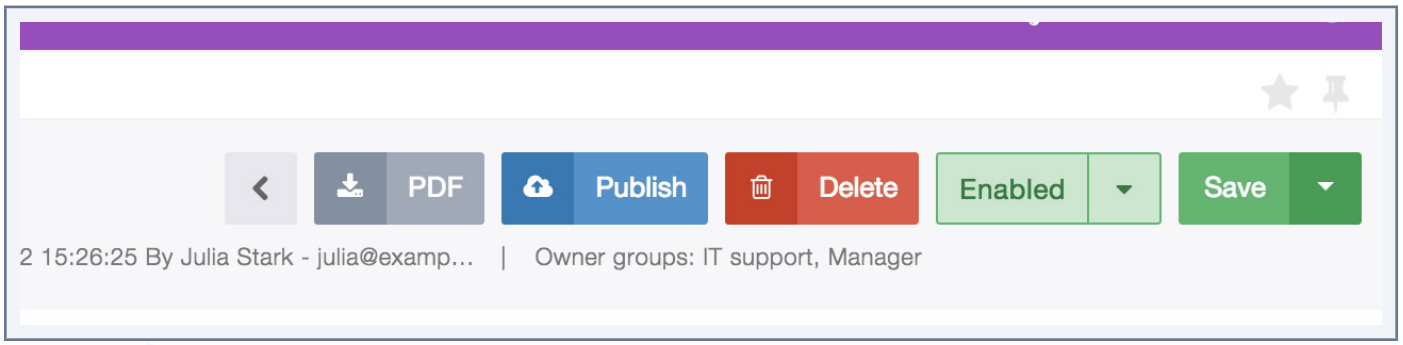


The page of the product form is displayed.

Only the locales that you can view or edit are prompted in the the list in the product header. The other locales of the catalog are not available.

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

- the user groups in charge of the product
- the status of the product form



For further details on the user groups in charge of the product, you can review the section "Send my proposal on a product for approval".

The status on the product form enables to know what information is displayed in the form. You can have the following status 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.

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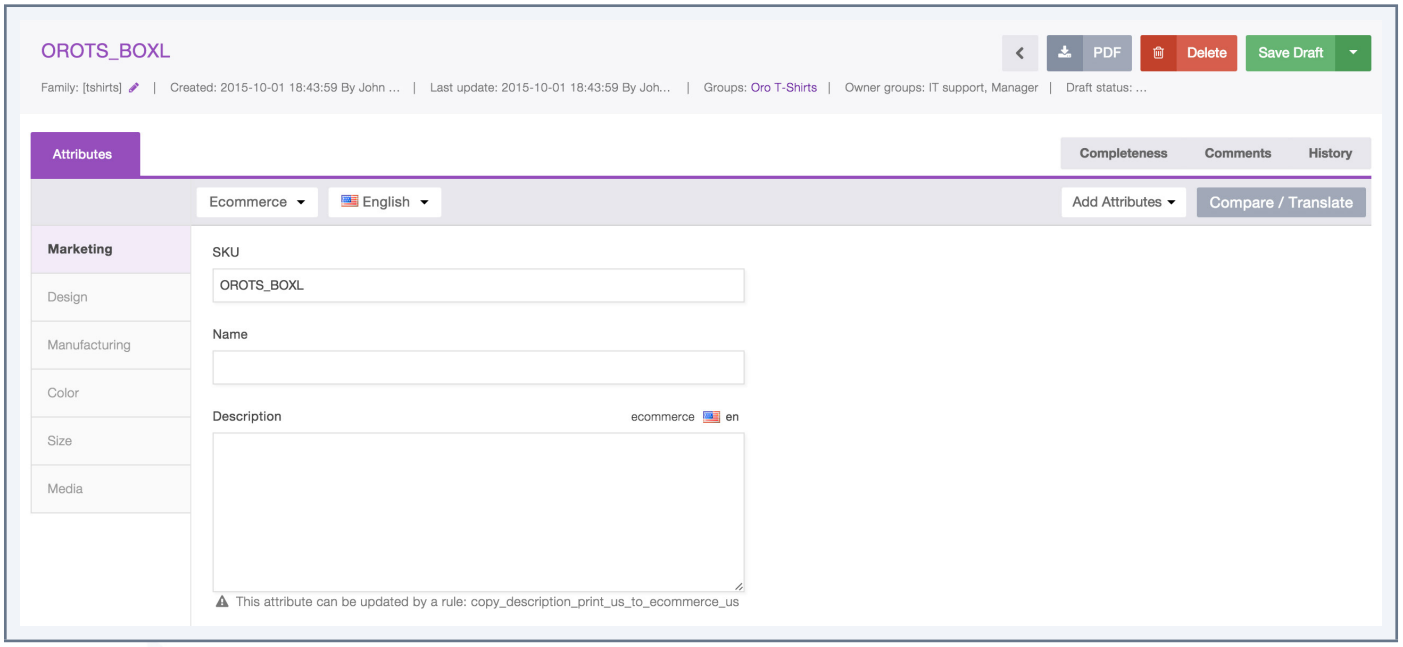
Open and edit the page of the product form will always be the same operation, whatever the status on the product form is.

To contribute to a working copy

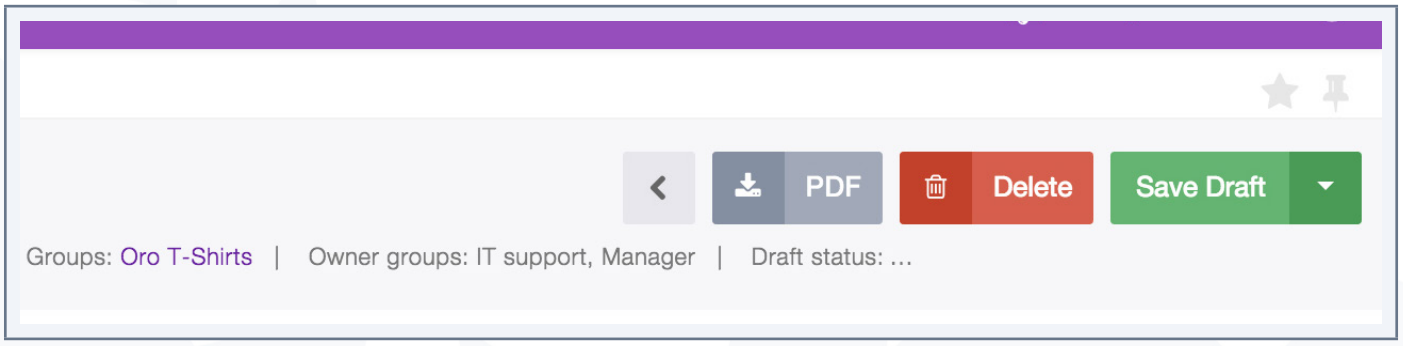
A product form will have the working copy status when you have not yet suggested new values for the product information (attributes).

If you do have the permission on a attribute group, this latter will not appear in the list on the left of the product form.

If you do not have the edit permission for a group of attributes, but only a read access, when you click on the attribute group in the list on the left, the attributes will be displayed but will be "grayed out". You will not be able to edit them.



You are able to edit all the attributes of the product from an attributes group for which you have the edit permission for the values of the product for the relevant locale.



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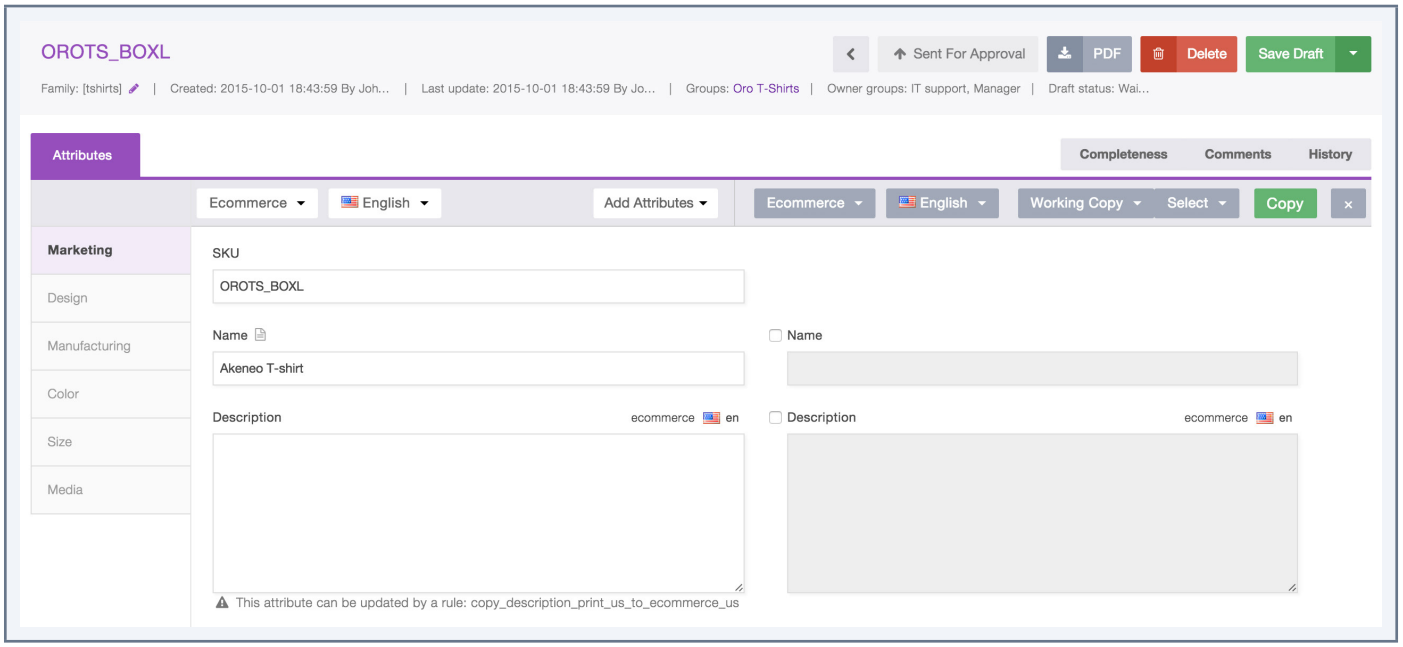
Click on the “save draft” button to save your changes.

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 of them, an icon is visible next to the attribute. Hover your mouse over the icon, you can view the ongoing approved value.



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

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

To contribute on my current version (Draft)

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

If you do not have rights on an attribute group, this latter will not be displayed in the list on the left of the product form.

If you do not have the edit permission for an attribute group, but only read access, when you click the attribute group in the list on the left, the attributes will be displayed but will be “grayed out”. You will not be able to edit them.

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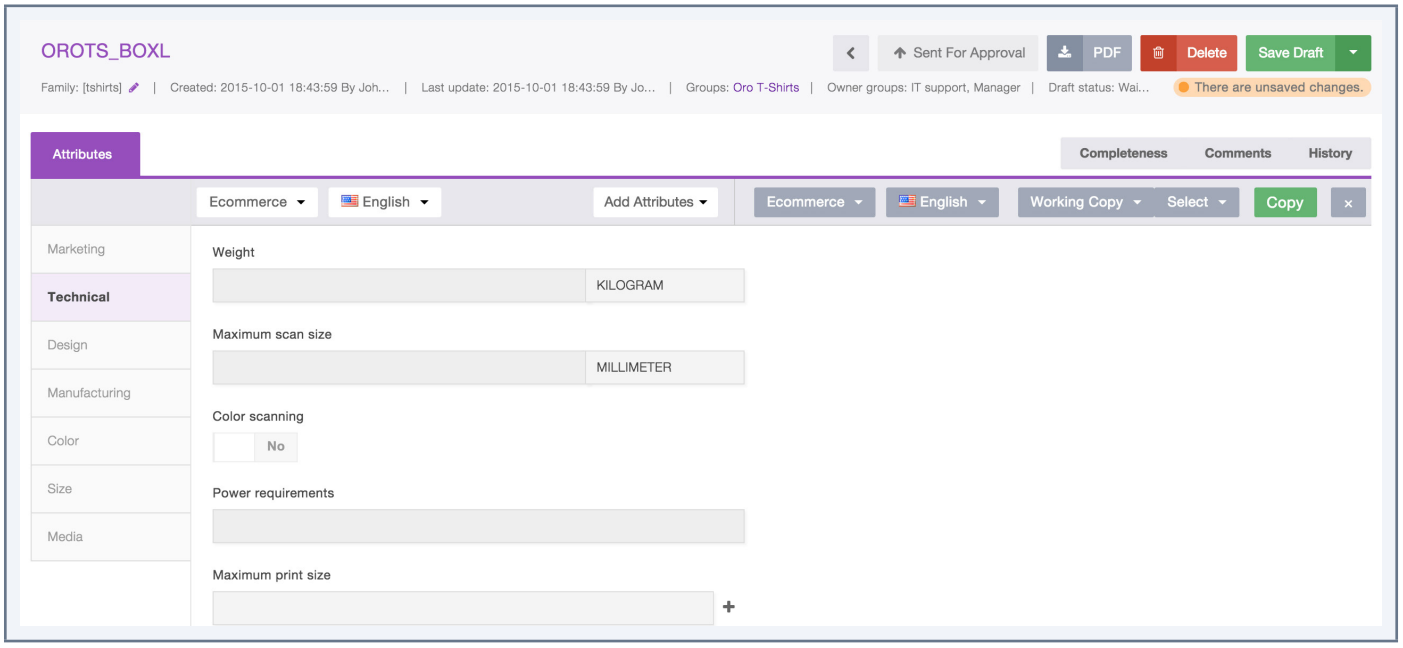
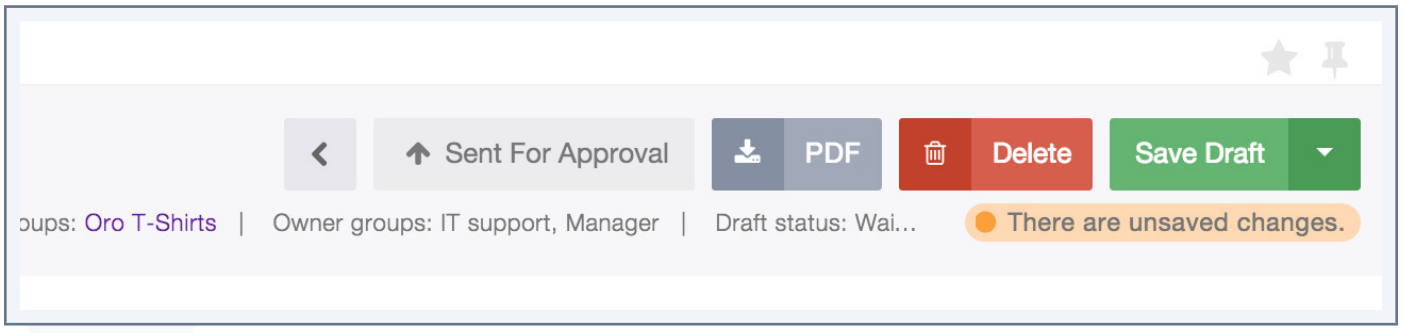


You can send your draft for approval at any time to the product manager. Please refer to the section Send my proposal on a product for approval.

You can also carry on working on the product proposal

- If you change any information that you have not yet registered, it will be added to your draft when you will save it.



For instance: description as being an attribute. There is not yet a value that has been approved. Value that you are saving = “example of description” is added to your draft.

- If you change any information that you will have already saved, these new changes will be saved in your draft. The old values will be deleted.

For instance: description as being an attribute. There is not yet a value that has been approved. Value that you are saving = “example of description “ but you change it with the value “This product is awesome”. When you click on the “Save Draft” button, the value “this is awesome” will be added to your draft, and the

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value “example of description” will be deleted from your draft.

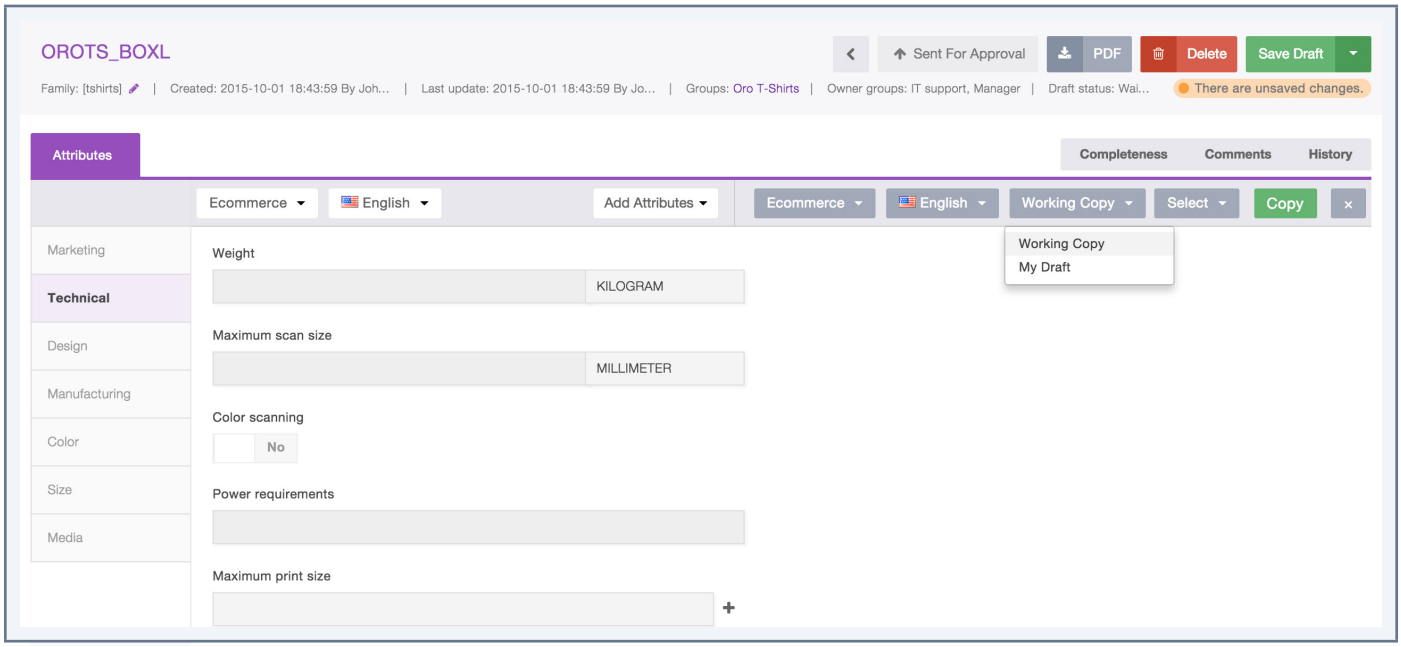
- If you propose the same value as the one that has been approved, the value will not be added to your draft.

For example: weight as being an attribute. Its approved value corresponds to “5 KG”. You have changed the value to “50 KG” and you save the record. Then you realize that you have made a mistake, and you enter “5 KG” and you click on the save button. So no value will be recorded in your draft for the “Weight” attribute.

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

In order to view the values of the working copy or your 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 dropdown list on top of the right panel (see below).



To contribute on 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 statutes.

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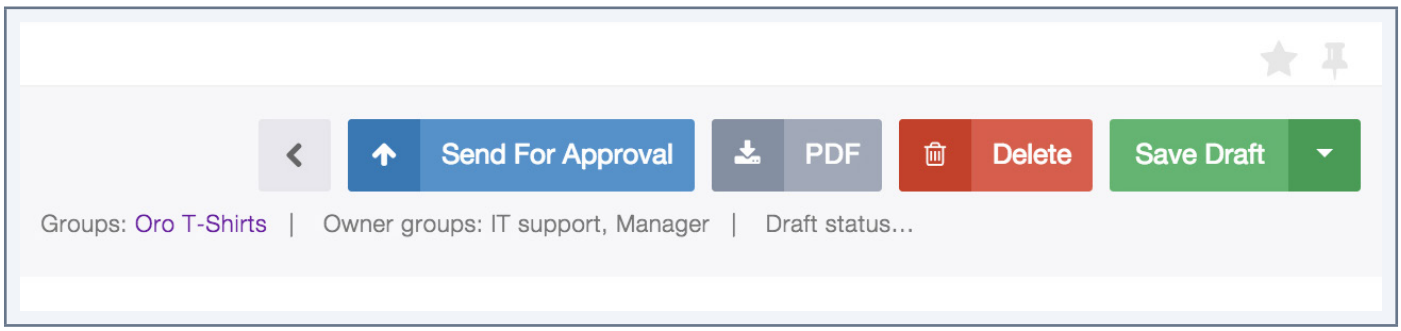
When you save your work, your draft will be updated and the product status will go back to “In progress” and it will be again sent for approval to the product managers who review your changes.

Send 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 it for approval .



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.

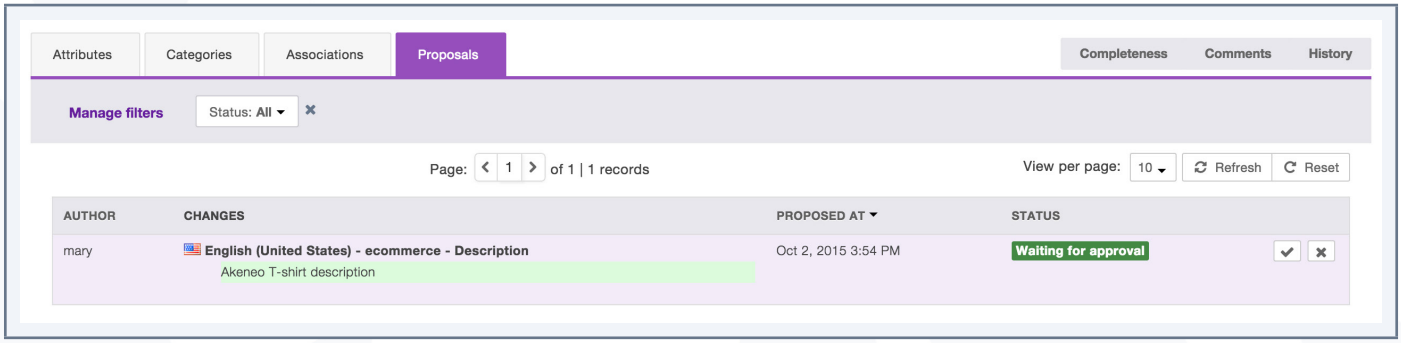
Product managers cannot partially accept a proposal: they can either approve everything or reject the proposal in whole.

If the product managers validate your proposal, then the values that you have proposed are saved in the working copy of the product and your draft is deleted.

If the product managers reject your proposal, then your draft is still there and the status of the product form goes back to In progress.

Manage 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



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

List the latest proposals to be reviewed

You have 2 ways to list the product proposals:

- From the Akeneo dashboard, the “Proposals” widget.
- From the menu ‘Enrich > Proposals’”.

Any user whose configuration in the PIM defines his role as in charge of some products, 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 line of the widget is a proposal (by product and by user).

Reminder: a contributor can only send one single proposal per product.

Each proposal has a shortcut button to view the draft.

Review the product proposals

You have 3 ways to proceed to check the product proposals:

- From the Akeneo dashboard, click on the “Review” button in the “Proposals” widget.
- From the product form, click on the tab “Proposal”.
- From the proposals grid, click on the shortcut “approve” or “reject” or “mass-approve” or “mass-reject”.

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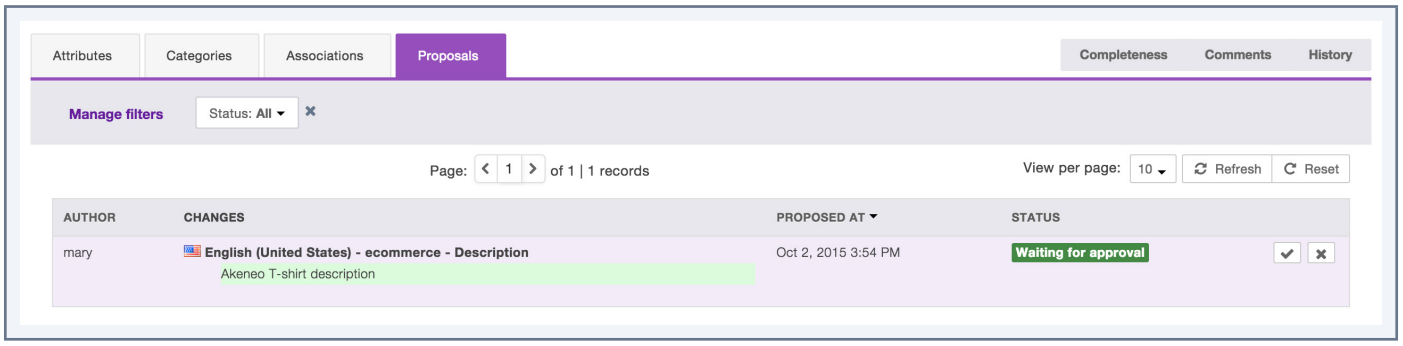
The two first actions take you straight to the list of product proposals:



The proposals have the following properties:

- an author (the contributor)
- changes on attributes, whatever the local or the channel is
- a date and time sent for review
- a status.

The status of a proposal can be:

- **In progress**: The contributor is still working on the proposal, it is not yet completed. Hence it is not possible to approve or reject it. Against this status, your are able to search and delete the current proposal.
- **Waiting for approval**: The proposal is complete. It can be approved or rejected. Against this status, it can not be deleted.

Approve a proposal

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

To approve a proposal:

1. List the product proposals
2. When mousing over the line of the proposals with the status “waiting for approval”, the icon is displayed

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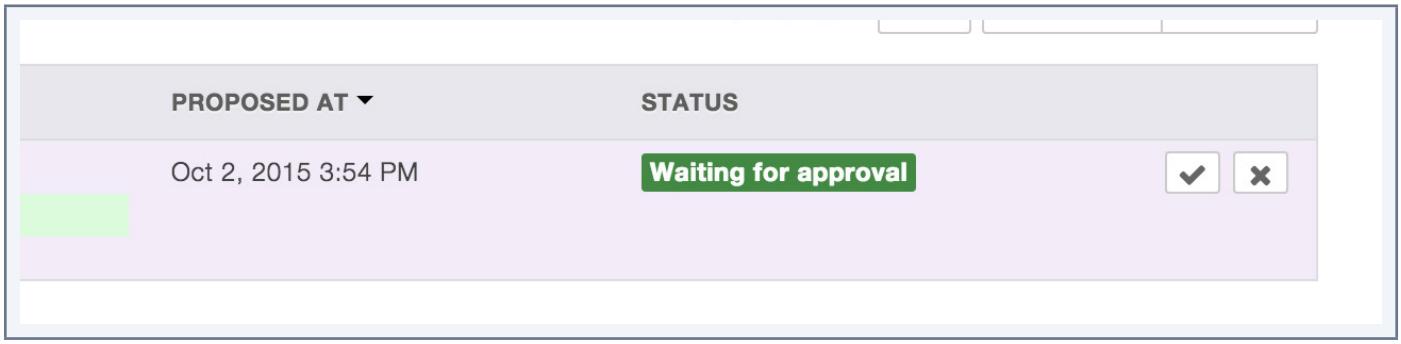


3. Click on the button to approve the proposal.

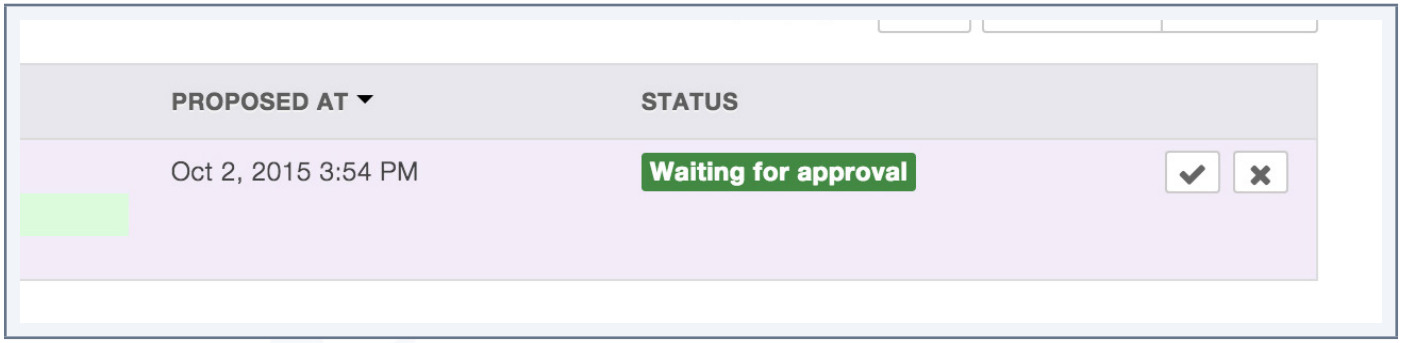
A confirmation message appears. The values are added to the product, and the proposal is deleted. You can check that the product information is added to the product if you go to the “Attributes” tab. You can also check that a new product version has been created in the “History” tab.

Reject a proposal

Rejecting a proposal enables the contributor to change the proposed values or even delete the proposal. When a proposal is rejected, the proposal goes back to the status “In progress”.

To reject a proposal:

1. List the product proposals
2. When mousing over the line of the proposals with the status “ waiting for approval”, the icon is displayed.



3. Click on the button to reject the proposal

A confirmation message appears. The values are not added to the product, and the proposal is move to the status “In progress”. You can check that the product information is not added to the product if you go to the “Attributes” tab. You can also check that a new product version has not been created in the “History” tab.

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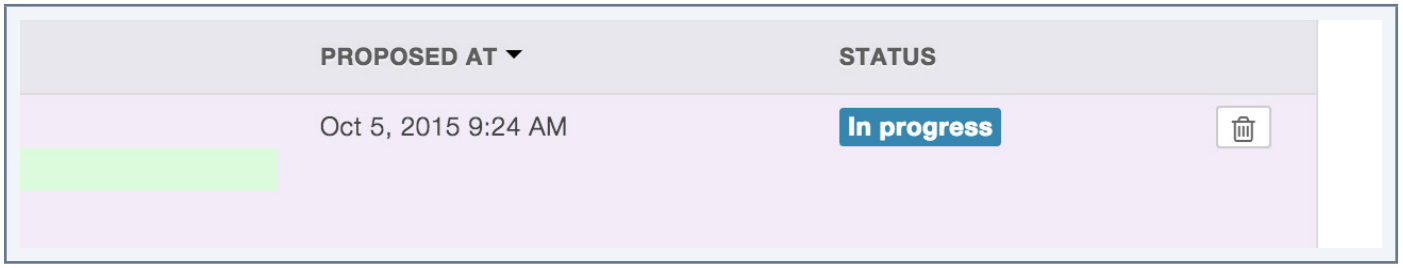
Delete a proposal

Only the proposals with the status “In progress” can be deleted.

Deleting current proposal cleans up the list of current proposals, when the need for them no longer exists, or in order to make the contributor’s work easier. Deleting a proposal deletes all the proposed values: the contributor will not able to find his changes anymore on the relevant product.

To delete a proposal

1. List the product proposals
2. When mousing over the line of the proposals with the status “In progress”, the icon is displayed.



3. Click on the button to delete the proposal.

The values are not added to the product, and the proposal is deleted. You can check that the product information is not added to the product if you go to the “Attributes” tab. You can also check that there is no new product version that has been created in the “History”tab.

Mass-review the product proposals

When you have a lot of proposals to review, you can list all of them in the proposals grid. You can access to that grid in the menu “Enrich > Proposals”.

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All the proposals displayed in the grid are with the status “Waiting for approval”.

Note

You may have some proposals with the status “Can’t be reviewed”. In that case, you cannot review the proposals because you don’t have the right to edit at least one of the attribute value in the proposal. Please contact your administrator to update your permissions accordingly.

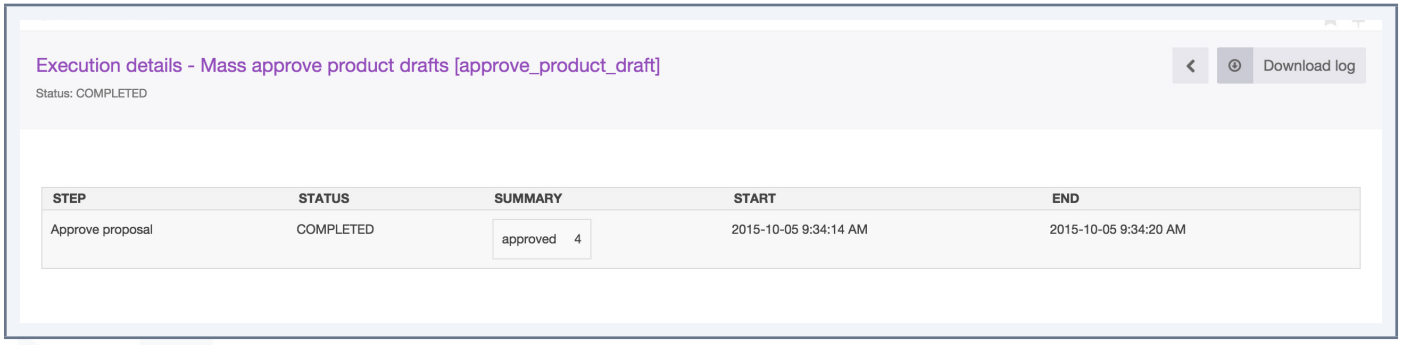
Two filters are available in the proposals grid :

- Author : the filter lists all the authors who have created a proposal in the grid.
- Proposed at : the filter allows to filter the proposals by their creation date.

To mass-review the product proposals :

1. Select the proposals you want to approve or refuse in the proposals grid.
2. Click on the action you want to apply : “Approve” or “Reject”.

The action is processed to the backend. The report page is displayed so that you can follow the execution of the action.



Managing the publishing process of a product (Enterprise Edition only)

As product manager for some items in the PIM, you can validate the information of your products. Furthermore, you can decide which version of your product will be used for export. Publishing products only impacts the export of products. The export of attributes, categories, etc ... do not take into account the notion of publishing.

What type of information is published?

Publishing products defines which product version is to be used for export.

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For example, a product is complete for all the locales of the web channel in its N° 5 version, and it is classified in the tree of the the Web channel. When you will publish the N° 5 version, it is all the information that will be used in the export of products.

You can change the product “Date” information eg to prepare the sales period. This new information will not be taken into account by the export until you will have not published the product version with the new information.

User case for product information that are not attributes:

Category classification, product activation (enabled / disabled), group membership, family change and product associations are not subject to the publishing notion.

This information is taken into account by export without requiring being published, as is the case for the Community Version.

Specific user case for associations between products

Only associations between products published are exported.

For example, if a published product A is associated to an unpublished product B, then the association will not be considered for export. If the product B is published, the association between product A and the published product B is taken in account for export.

Publishing product

Publishing one product

To publish a specific product

1. Open / edit the product page
2. Click on the “Publish” button

The current version is published. In the “History” tab, the published version is registered with the following label: in the “Published” column.

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Publishing multiple products

To publish several products simultaneously

1. Select the relevant products in the grid
2. Click on the mass edit button
3. Select the operation “publishing products”
    - If you are responsible for all the products you have selected, confirm the different steps and all products will be published
    - If you are responsible for only some products you selected: an alert message informs you that you will only be able to publish the relevant products for which you are responsible. Then, confirm the different steps and all the products you manage, will be published. The other products left will not be published.
    - If you are responsible of any product you have selected, an error message will inform you that you cannot publish the product because you do not have permission to publish . Click on the “Back” button to exit the process of mass edit:

You can then list all the products published

List the published products

To list the published products

1. Go to “Enrich > Published products”
2. The product grid for published product will be displayed just as long the product grid you have for unpublished products

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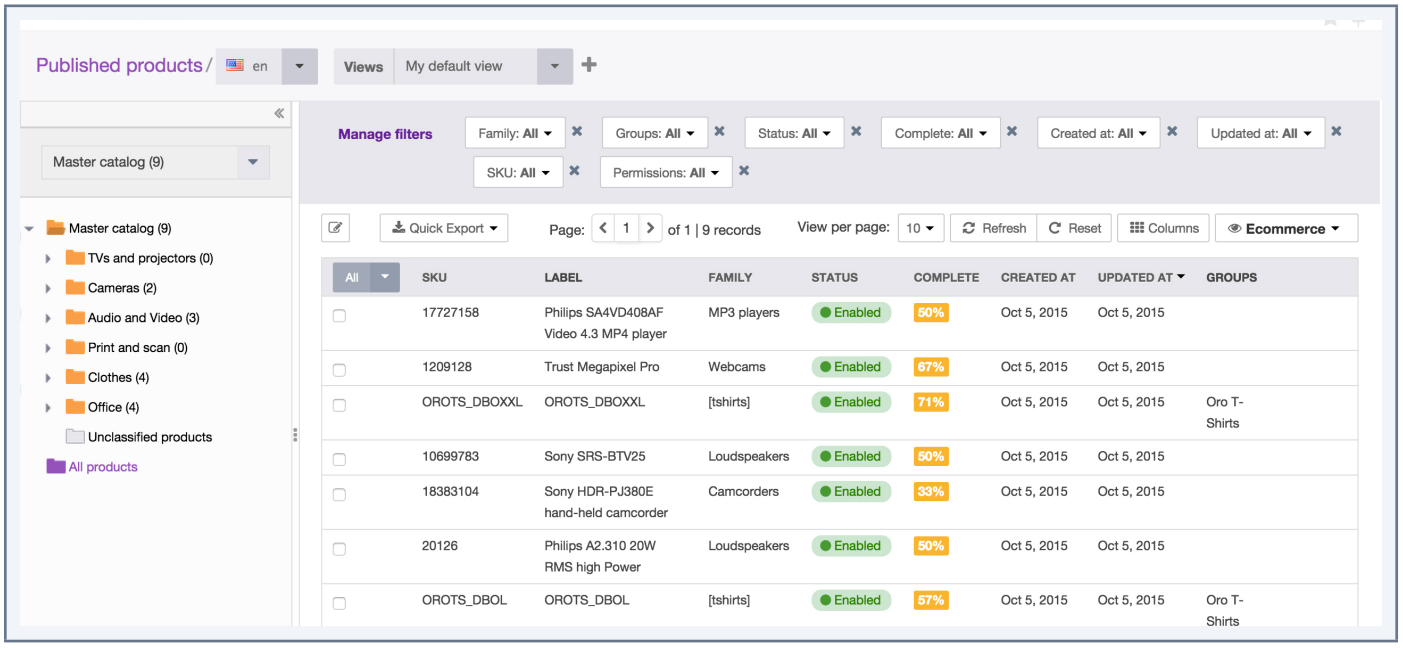

You will have the same functions available as for the grid of unpublished products, except:

- it is not possible to create a product from this page,
- it is not possible to delete any published products
- it is not possible to modify any published products

The views are specific to the published product grid and those that are in progress. Hence, the views of unpublished products are not prompted to the grid of published products.

The attributes, families, groups, and categories are taken in 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, however you can view them:

Viewing a published product form

To view a published product form

1. Go to “enrich > published products”
2. Click on the product line you want to view
3. The product page is then displayed

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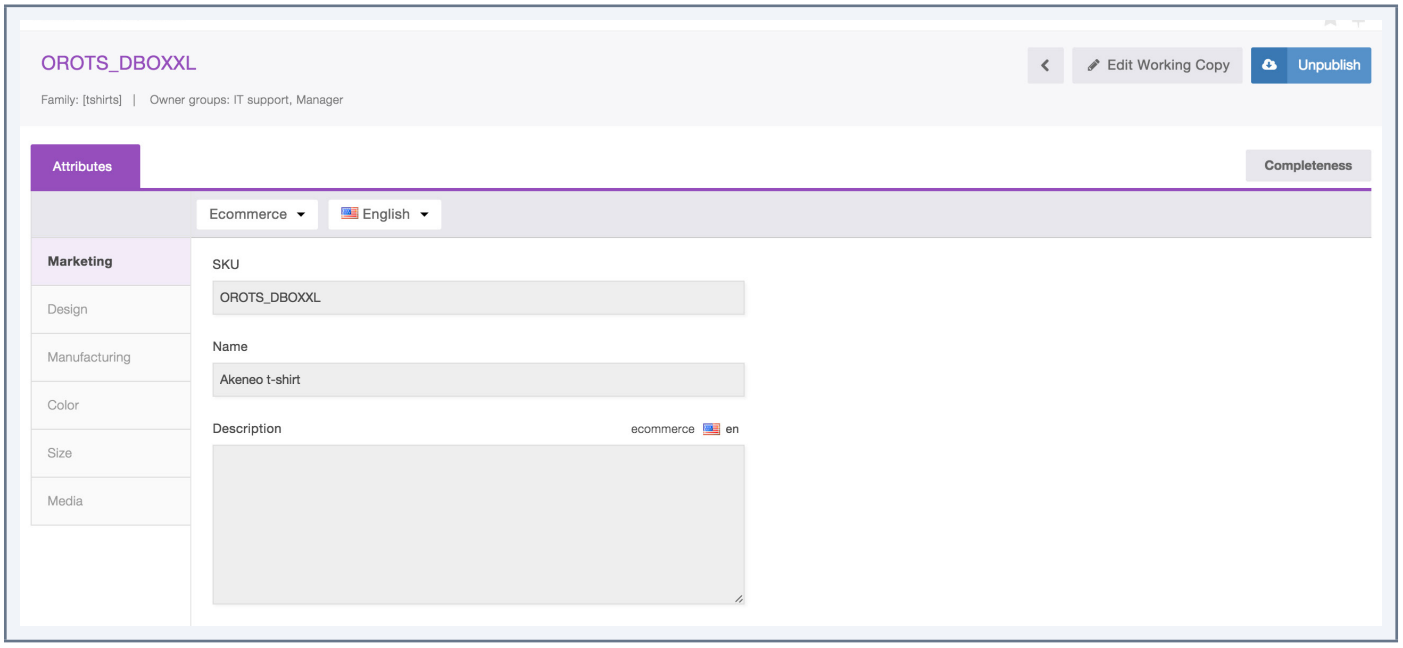
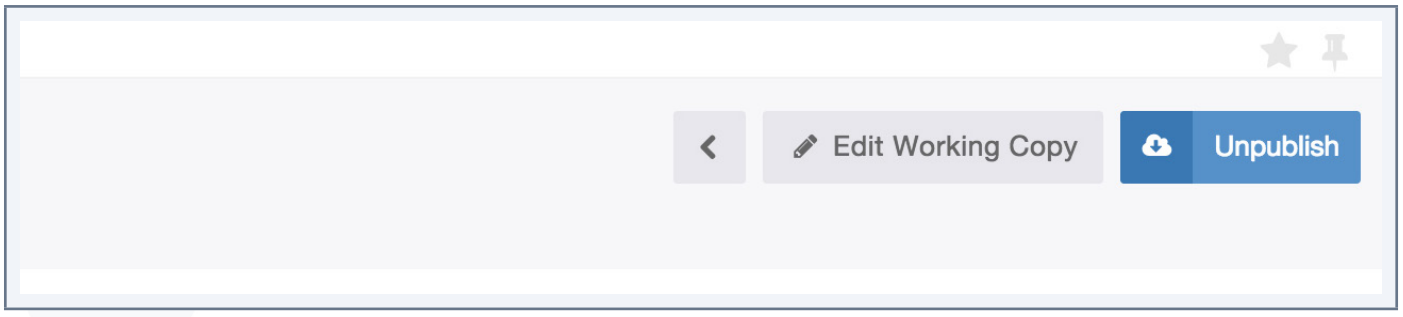


The view on the published product page is just the same as for an unpublished product. For more information, you can refer to the “Contributor User guide” in the section,” viewing a product form.” Also, if you do not have the appropriate rights to see some attribute groups at least, these latter will not be displayed

When you are responsible for 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)



- unpublish product

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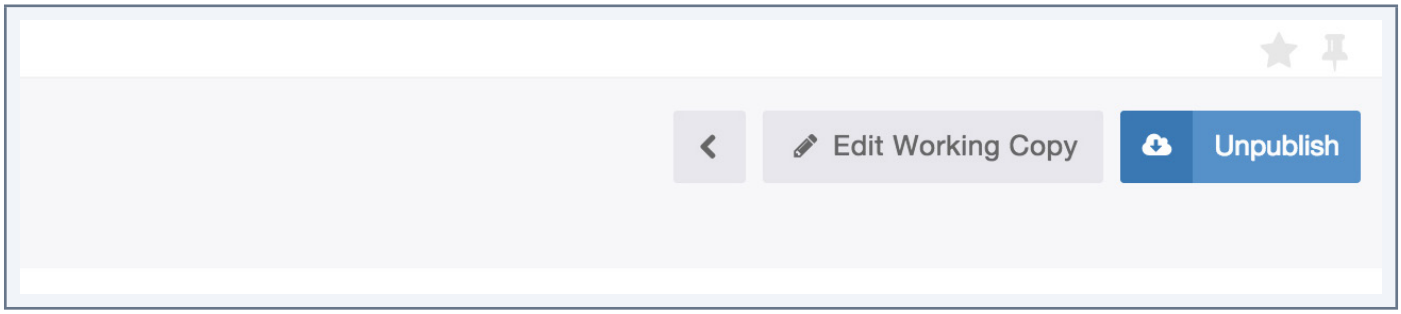

Unpublish products

Unpublishing products enable you to determine that a version of your product will not be used anymore for export. Unpublishing products only impacts the export of products. The export of attributes, categories, etc ... do not take into account the concept of unpublishing product.

Unpublishing a single product

To unpublish a product :

1. Go to Enrich > Published Products or Enrich > Products
2. Select from the grid the product to unpublish
3. Click on the “unpublish” button

The product is no longer published, that is to say, it can no longer be exported. The product is listed in the published product grid.

Unpublishing a selection of products

To unpublish several products at the same time

1. Go to Enrich > Published products

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2. Select the products in the grid
3. Click the Mass Edit button

4. Select the operation “unpublish Products”
    - If you are in charge of all the products you have selected, confirm the different steps and all products will be unpublished
    - If you in charge of only some products you have selected: an error message informs you that you can unpublish only the products for which you are responsible. Then you will be confirming the different steps and all the products you manage will be unpublished. The other selected products left will not be unpublished.
    - If you are in charge of none of the products you have selected: an error message informs 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 (EE)

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?

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

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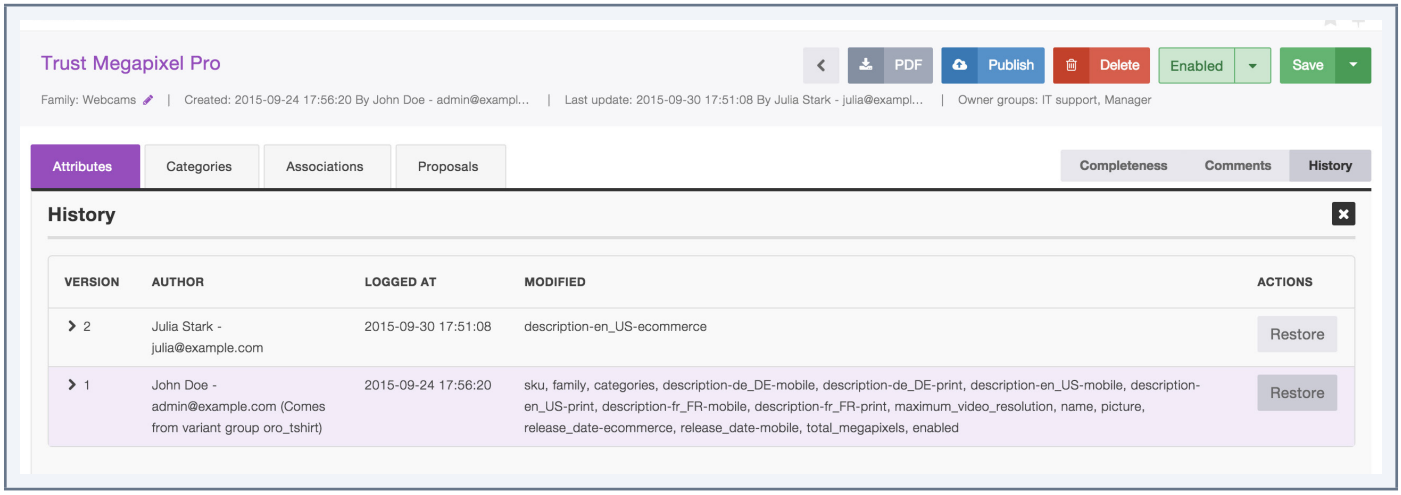
What does it mean to restore a product version?

This means restoring a version to go back to an earlier version of a product. For example, if you have 15 product versions, it is possible to go back to the version No. 5, which cancels any changes done from the 10 next ones.

In this example, restoring the version # 1 void prices in euros dollars, and the image for the attribute “picture”.

Restoring a version generates a new version representing the restored version.



In this example, the created version contains all changes generated by the restored Version # 1, 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.

Restore a version

To restore a version:

1. Go to “Enrich > Products”
2. Select the product which is one of the versions to restore

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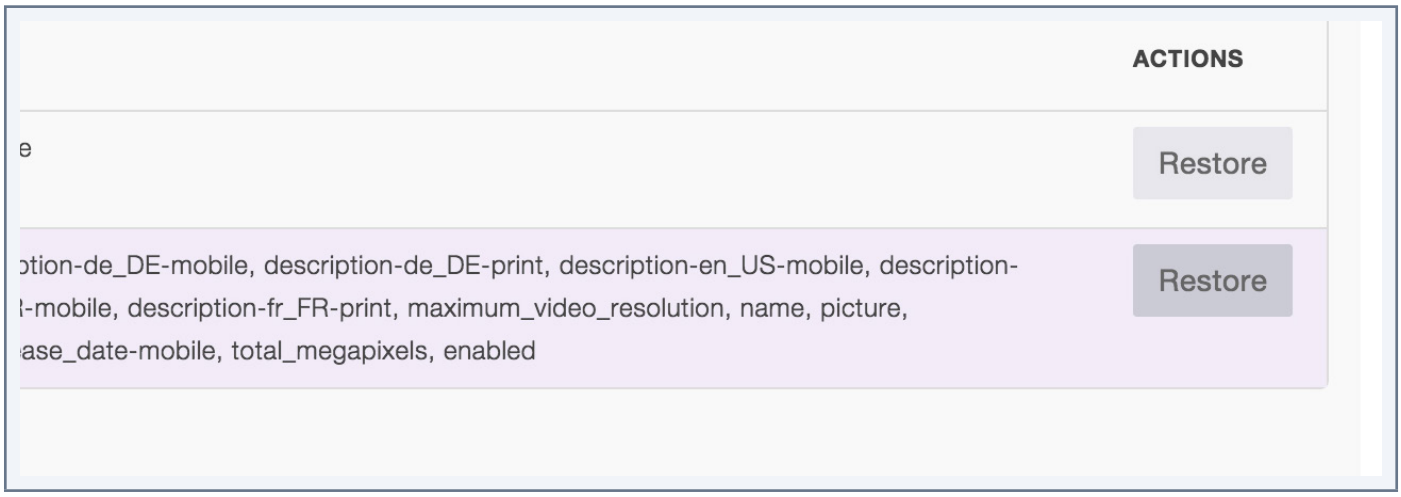
3. Go to the “History” tab
4. Click on the “Restore tab icon” to restore the version



Then the version is restored.

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WORKING WITH VARIANT GROUPS

Using the grid of the variant groups

To start, go to Enrich > Variant Groups: in this page, there are many ways to work with the grid of variant group as you will discover below.

Page numbering

The Grid of the variant groups has page number. All variant groups are displayed in the grid and come per set of N variant groups. The number of variant group is shown at the top right of the grid

This number of variant groups per page can be modified by clicking on the drop down list to select the number of items:

Note

This number is not retained as a contextual element of work. In other words, when leaving the page to view an edition form of a variant group for example, and that you go back to the grid of the variant group, then the number of variant groups per page returns to the initial configuration, which is “10”.

In order to navigate through the different pages of the grid of the variant group, there are two navigation buttons allowing to go to the “next” and “previous” above the grid. Eventually,

the page number is displayed in the center. It is possible to go directly to a specific page by changing the field of the current page number.

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Note

Navigation through the pages of the variant group grid is not retained as a contextual element of work. This means that when you leave the page to view a form of a variant group for example, and you go back to the grid of the variant groups, then the page number corresponds to the original configuration, which is “1”.

Manage filters

When you overview the grid of the variant group, you will be able to manage filters as well.

1. Enter your criteria. If the displayed selection criteria are insufficient or irrelevant you can add additional criteria by selecting from the list that appears by clicking on “Manage filters”.
2. The grid is then automatically updated when a new filter applies.

The label filters are located: If an attribute has a label in the locale of preference recorded, then this specific label is used. If there is no label available, then the attribute code will be displayed into brackets. For example: [COLOR].

Filters can be applied on the following information of the variant groups:

- Product information managed by the PIM
    - Code,
    - Label,
    - Axis of variation

Sort out variant groups

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

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Note

you cannot sort out the following information:
- Axis of variation

The shortcut actions on each variant group

There are several actions available on each variant group, that you can operate from the last column in the grid. The buttons are displayed when you place the mouse over the line.

Note

The actions of shortcuts are displayed if you have the necessary rights, or as if you are in the Enterprise or Community Version.

Creating a variant group

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

To create a variant group in the

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

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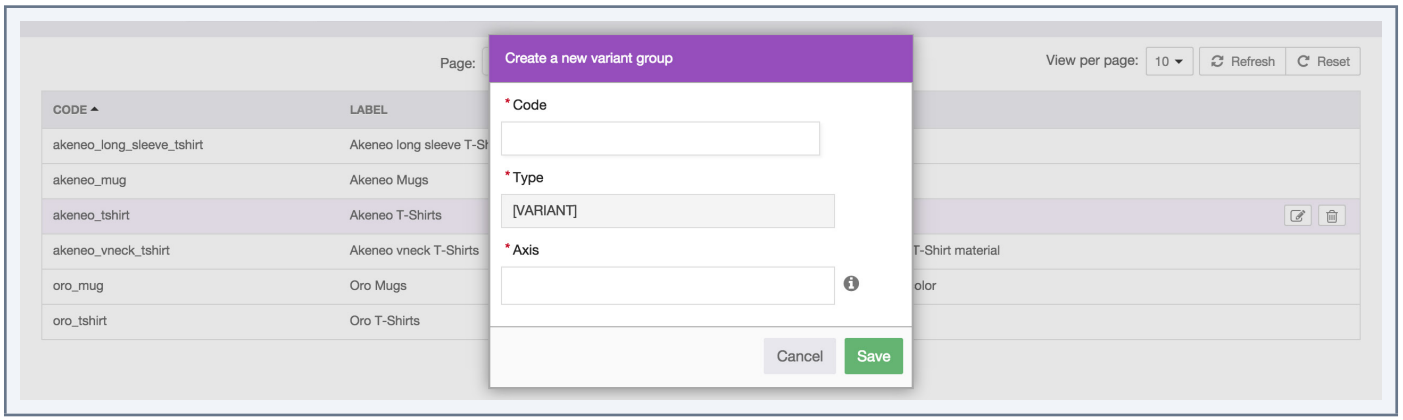
2. Enter the unique code and choose the axis of variation
3. Click on save

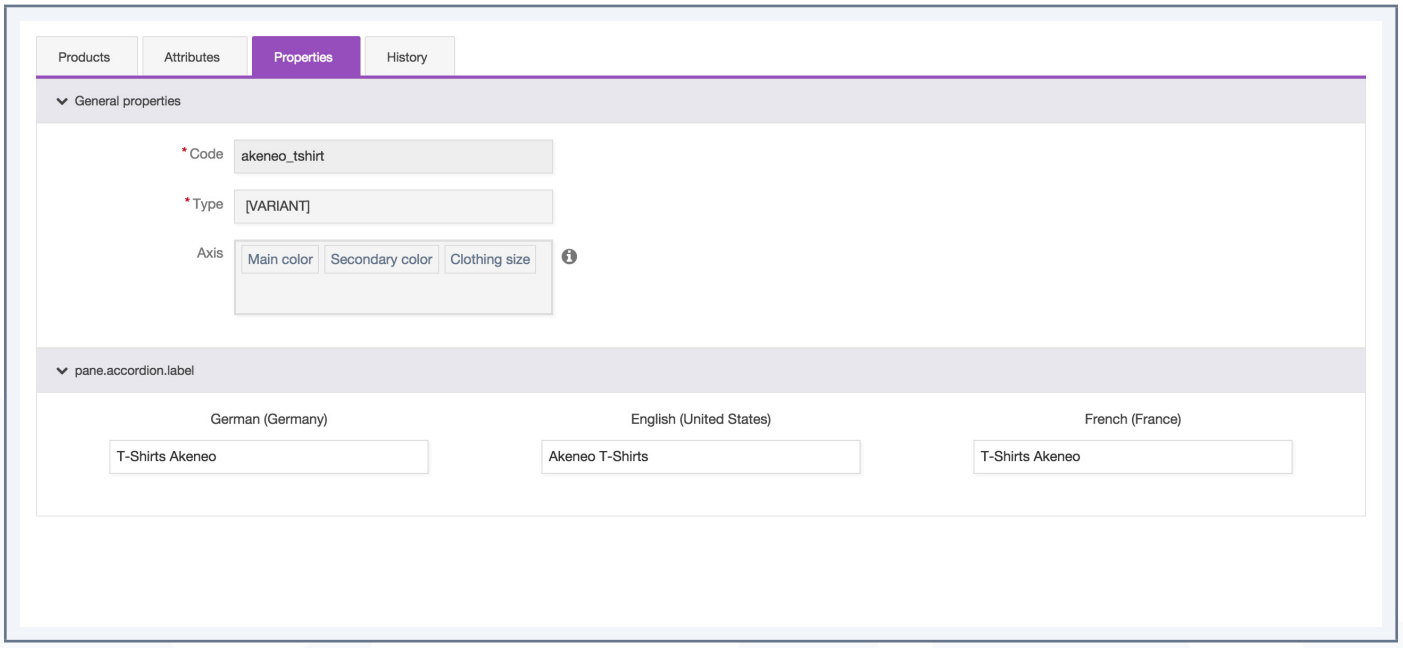


Note

The axis of variation can only be a simple select attribute type, not localizable and not scopable. There may be as many axis of variation than needed.

The variant group is created and the edit page appears.

Editing a group of variants



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1. Click the edit tab.
2. Change or complete the information in the fields correspondents.
3. Click the “Save” button.

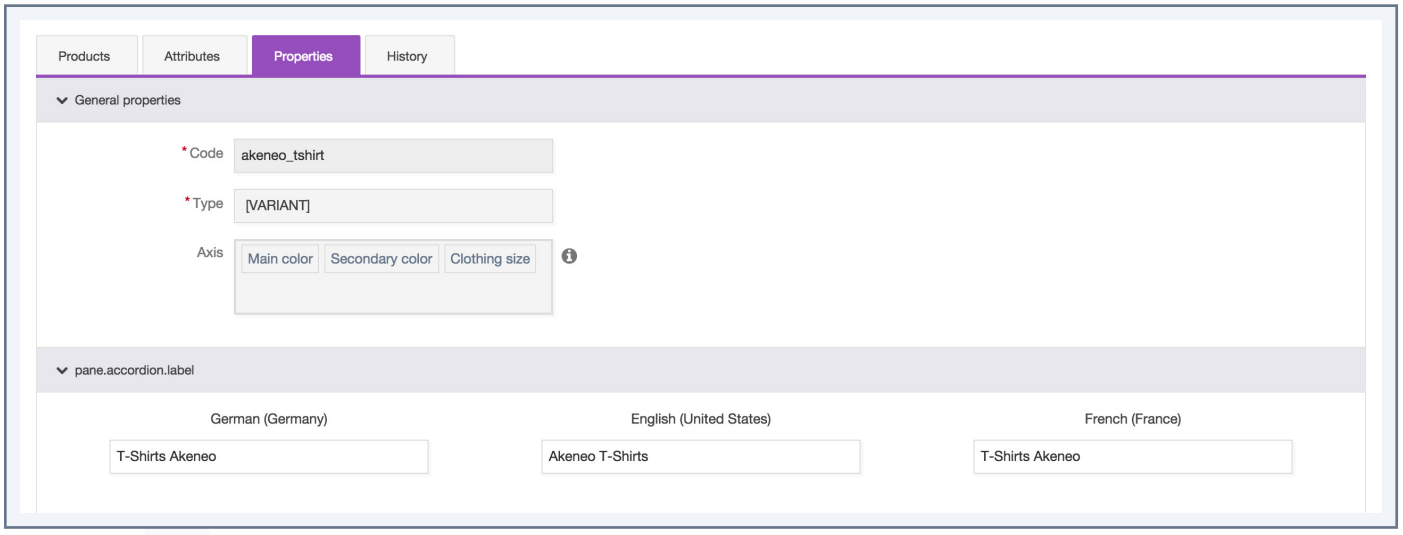
The variant groups is updated with your changes, and a new version of the variant group is created.

This version is available in the “History” tab, if you have the view permission for this tab.

View / change the label of a variant group

A variants group have properties that can be viewed but cannot be changed:

- Code
- axis of variation
- type (Variant)translated..



The labels of a variant group are editable to be To do

1. Click on the “Properties” tab
2. Make your changes on the labels of variant group
3. Click on the save button

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

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Add / remove attributes from a group of variants

It is possible to add attributes to a variant group, if you have the appropriate permissions.

Note

Any existing attributes in the PIM can be added to a variant group except:

- attributes that are used as axis change of the group
- the attributes having the property of having unique values (SKU for example).

Since the publishing of the product group

1. Click the “Add Attributes” in the top right of the tab “Attributes” button
2. form:..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.
    - You can select all the attributes of a group by clicking the wording of the attribute group.
3. 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 groups. In this case, please contact your administrator.

Manage products in a group of variants

A product can be attached to one or no group of variants.This type of relationship has no direction: Product

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A <-> Product B <-> C Product every three are part of group variants 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:..

How to manage the products bundled in a variant group?

1. Open via the edit product form of the selected product
2. Click on the “Products” tab.
3. Identify the products in the grid and check them.
4. Uncheck the products you do not want to associate in the current edited 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:

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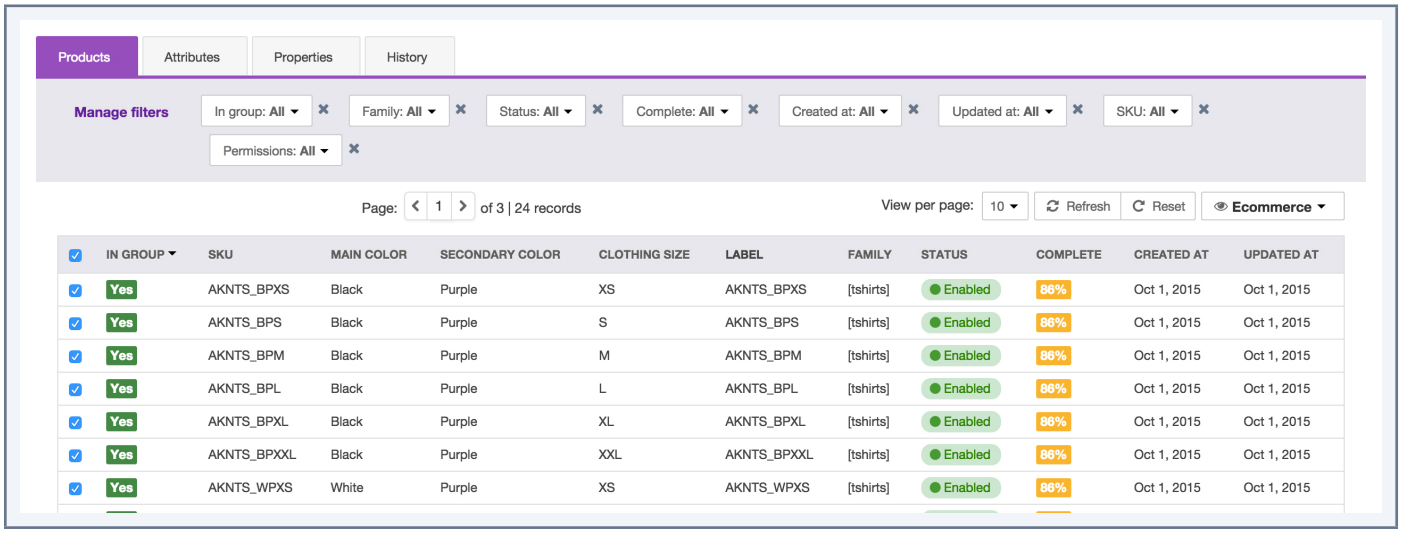


Check versions of a variant group

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

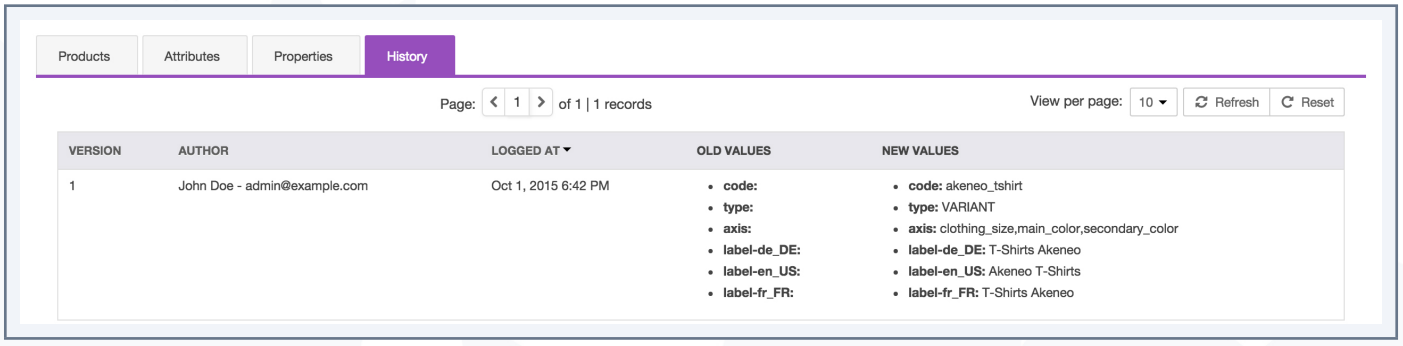
- Change of attribute values in the edit form of the group
- Change of properties.

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 that has generated changes
- The date and time at which the changes have been applied
- The old and the new value for each change.

To view the versions of a variant group:

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



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Deleting a group of variants

A group variants 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 you could proceed

- via the edition form of the group
    1. Open the edition form of the group you want to delete
    2. Click on the “Delete” button in the header of the page
    3. Confirm the action in the popin.
- via the shortcut in the grid
    1. Identify the group you want to remove from the grid of the variant group.
    2. Mouse over the line of the variant group 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.

Note

the product that are associated to the variant group are not deleted. They can be allocated to another variant group.

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CARRY OUT ACTIONS ON SEVERAL PRODUCTS

Bulk operations enable to perform an action 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. Ex: Enable all products of the tree “Catalog for Sales Week 14”

- Edit common attributes
  Apply a set of values for common attributes to a selection of products. Ex: 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. Ex: Put all the products of the category “ Catalogue Reference > Booklets” also in the categories “Website > Women > Accessories” and “Website > Lifestyle > Office Stationery” .

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

- 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) Ex: 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. Ex: 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.

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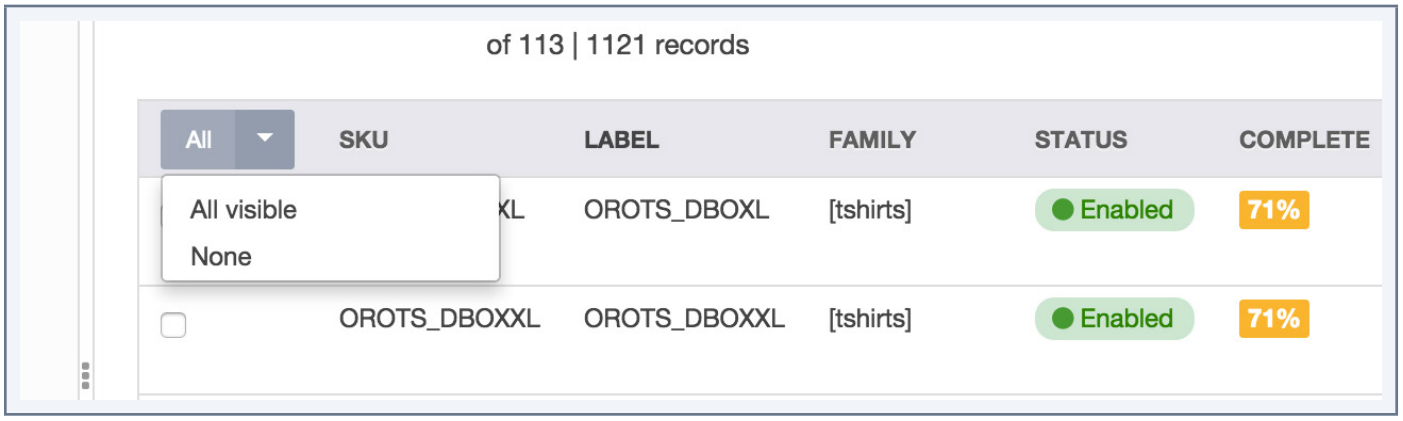
Note

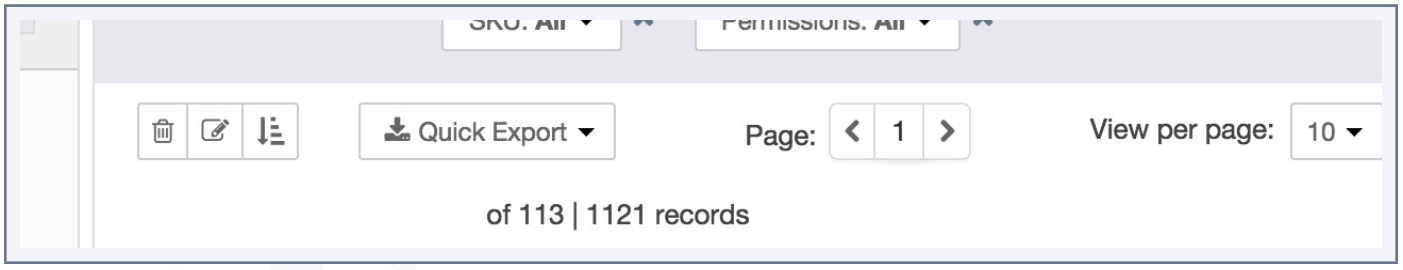
In order to perform a bulk operation on products, you need the rights to each possible action, and also the general permission to perform bulk actions on products.

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 assistance: 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 “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

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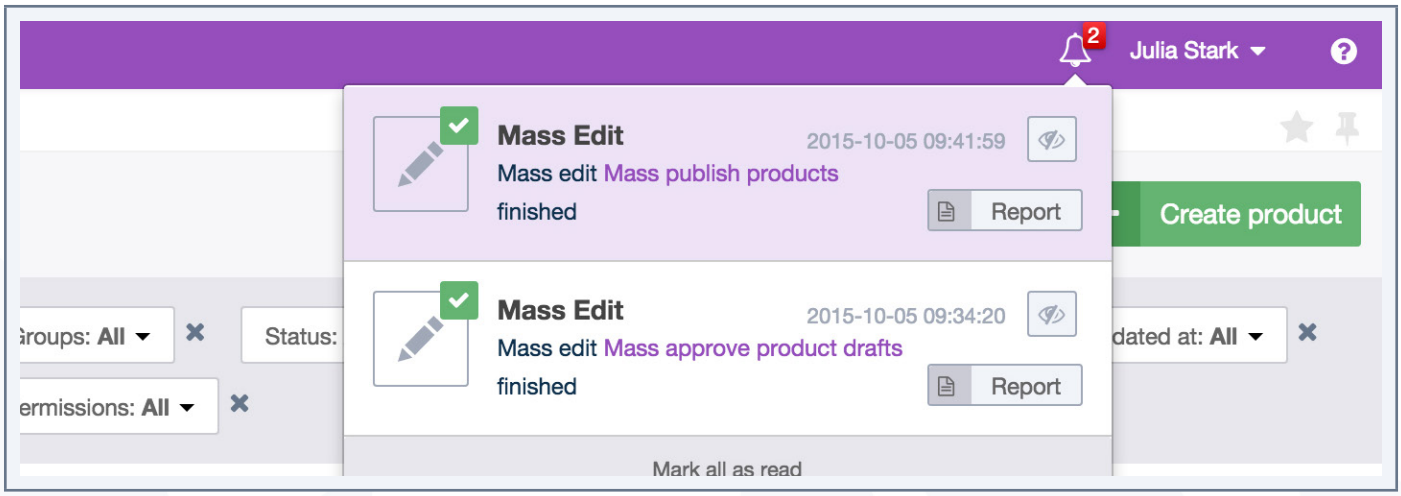
Operation	Step of configuration
Status change	Select the status to be applied.
Edit common attributes	Add attributes to the product form to set the values to be applied. You can choose the locale in which you want to edit.
Classify products in categories	Check the categories in which the products will 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.



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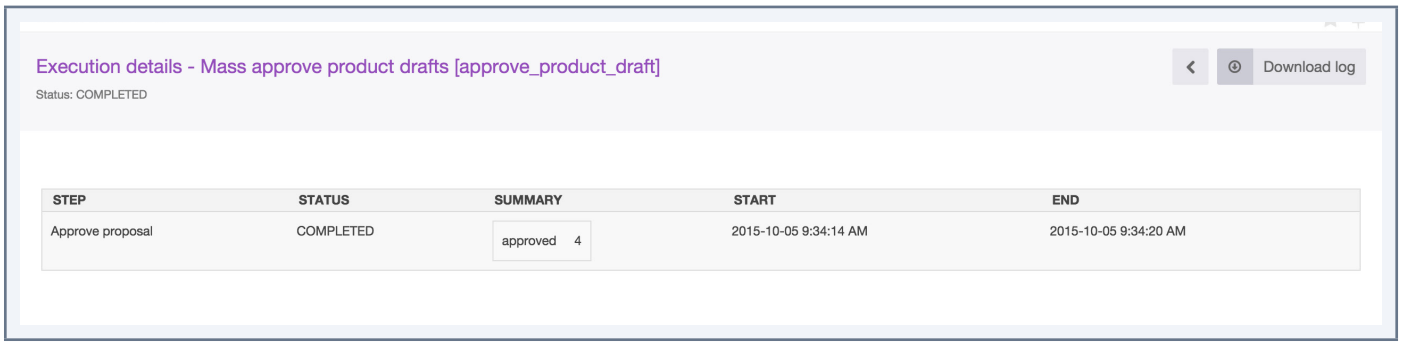
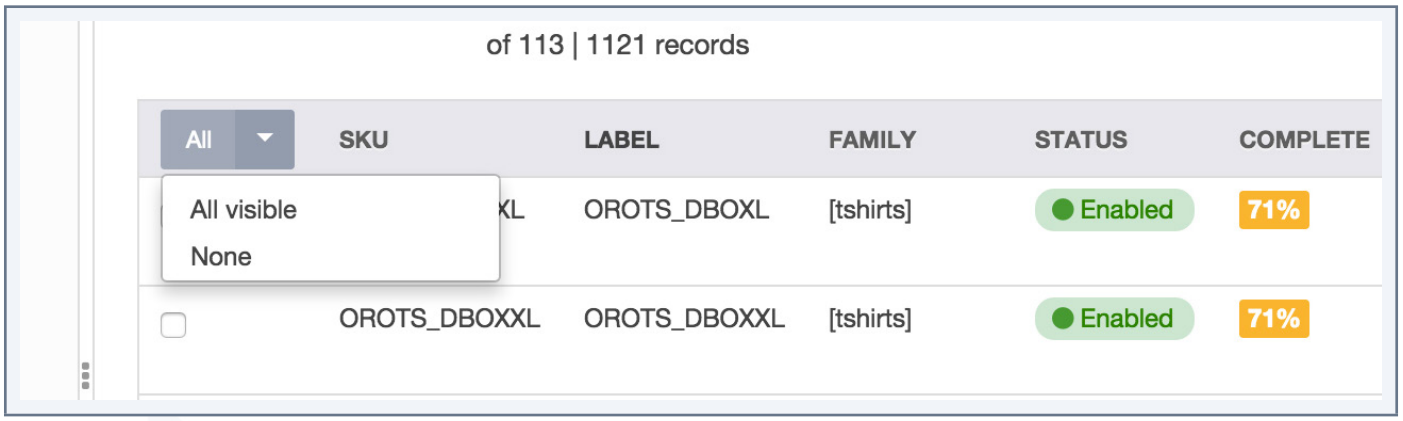
When you click on the notification, you access to the report page of the action.

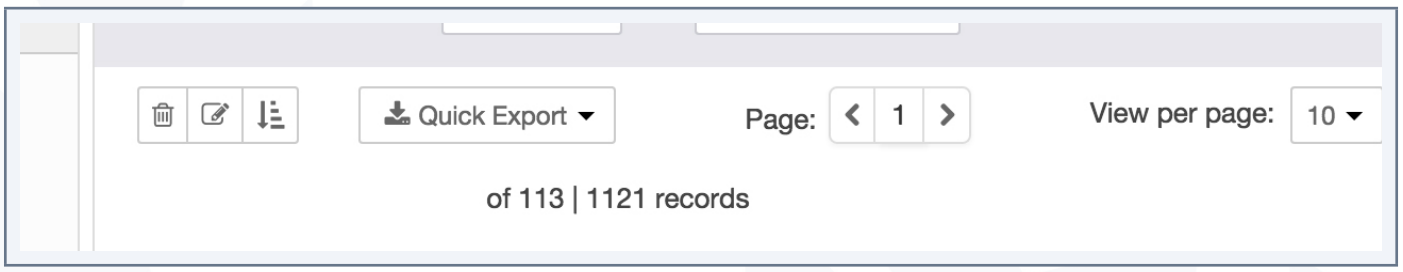


Delete multiple products

1. Search for products in the datagrid with the appropriate filters
2. Select the products to be removed via the selection assistance: 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.

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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 assistance: 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.

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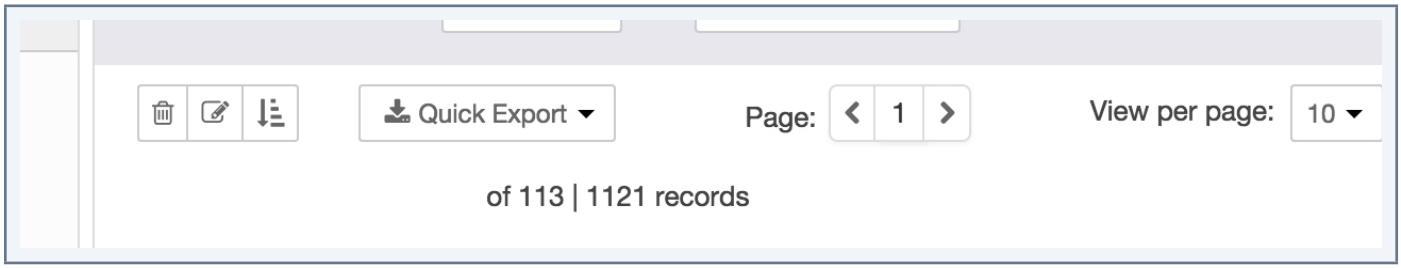
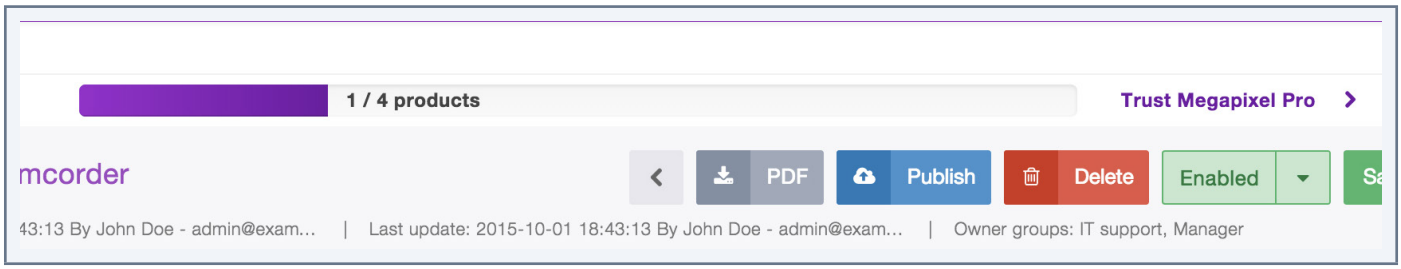


4. The product edit page of the first product of the selection is prompted with a progress bar at the top of the page.



The progress bar tracks down the number of products that have already been changed from the total number of products of the selection. The progress bar is framed by two links on the left and right-hand side:

The left link to go back to the previous product, the right link to switch to the next ones.

Enterprise Edition note

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

Generate a CSV 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. This can be used to retrieve structured product information and thus create your own reports, graphics, etc.

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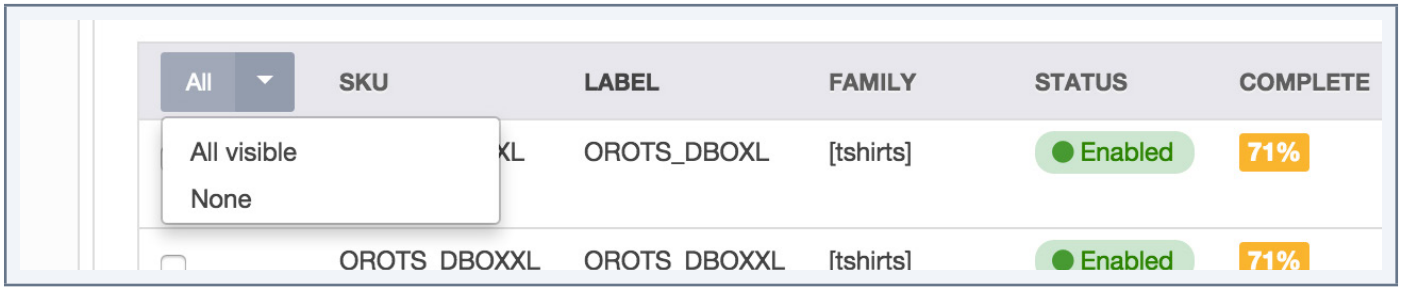
/! \ The large exports (hundreds of products for example) are not a recommended action, or even can be blocked in the PIM settings. To change this setting, please refer to the technical documentation.

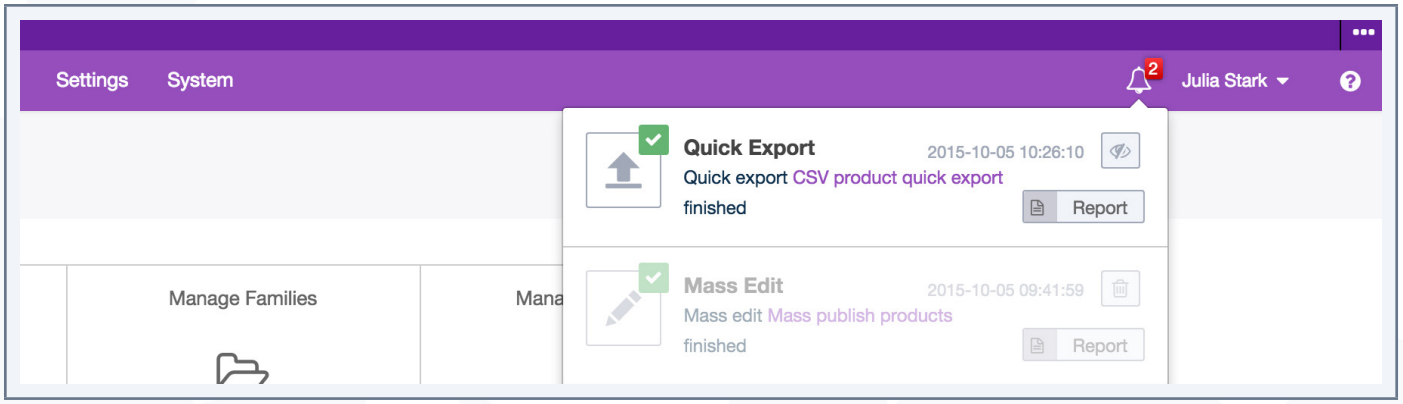
To start the export of product information from the datagrid

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 assistance: 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 the “CSV (all attributes)” option.

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.



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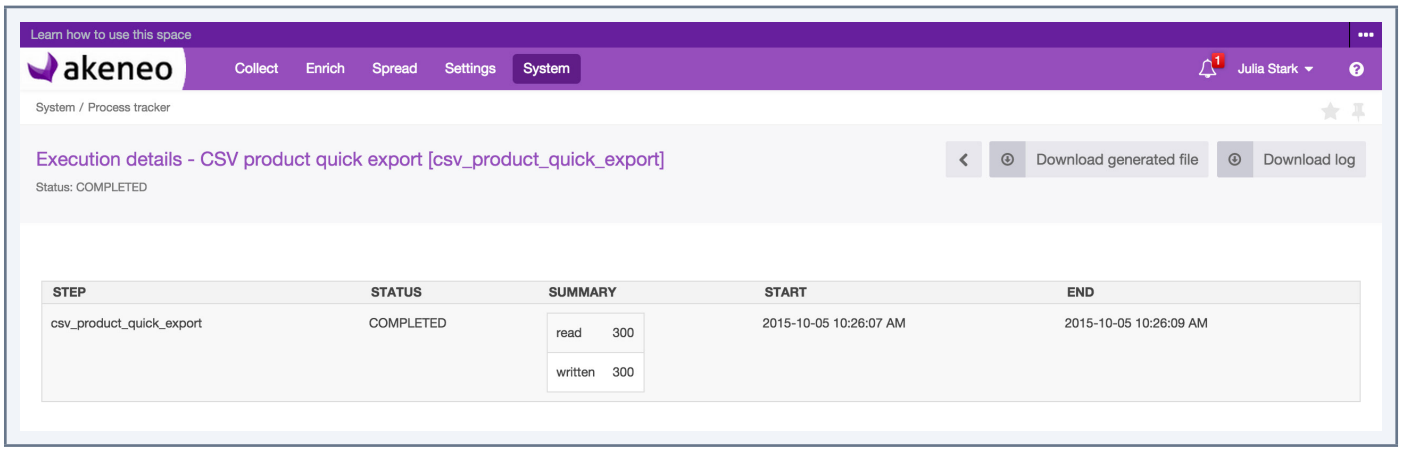
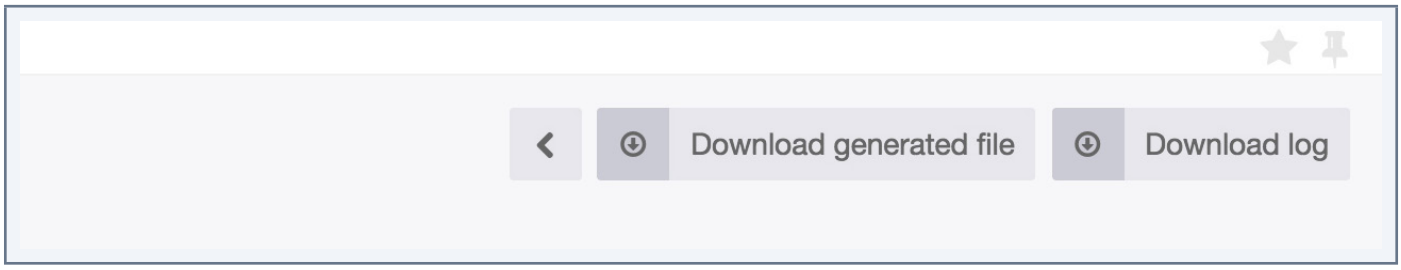
When you click on the notification, you access to the report page of the action.

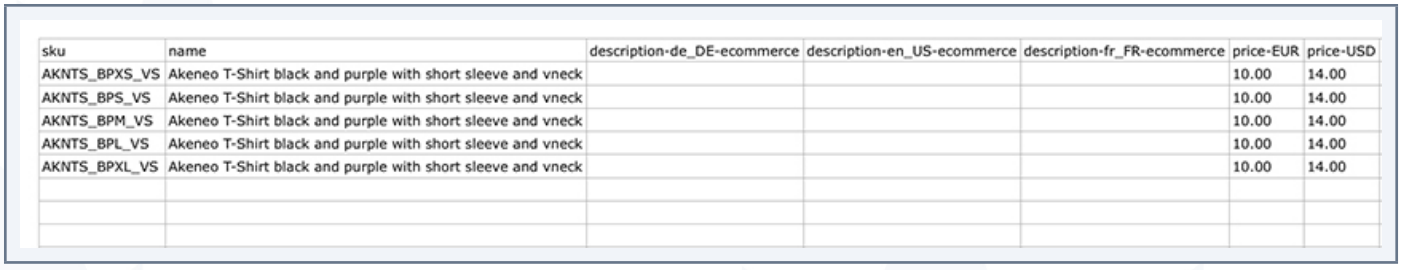


On the report page, you can download the generated file. [Screenshot button]



A file named Products_export_<Working Local Code>_<Working channel Code>_Date_Heure.csv 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 format with the Akeneo connector. Only the working channel is taken into account, and thus all the local 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.

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Note

Any user with access to products can execute an export from the datagrid. There is no particular rights to provide access to this feature.

Enterprise Edition Note

Export from the datagrid also works for products for which the user do not have the edit permission.

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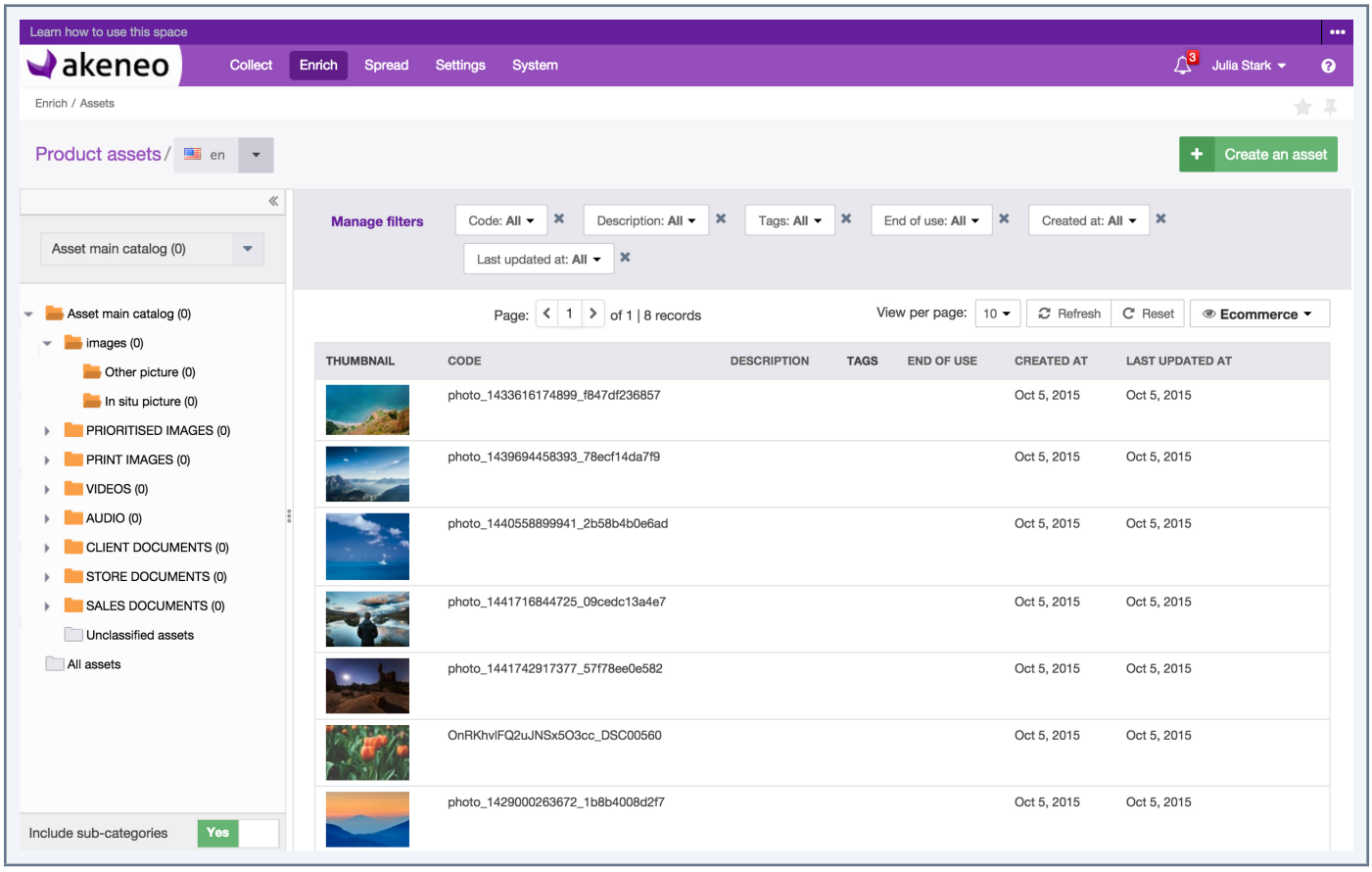
USING THE ASSET GRID (EE)

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.

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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 locale of the user interface of the PIM. This latter is set when installing the PIM and is applied to all the PIM users.

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 local selected higher up on the page. If there is not a working channel is selected as the local is not required by the channel you want, so it is not proposed. To add a local to a channel, refer to the “Configure channels” in the PIM Administration 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.

Note

This page number is not taken in account as a contextual element of work. This means that when you leave the page to view an asset form for example, and you go back to the page of the asset grid, then the number of products per page returns to the initial configuration, which is set to “10”.

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

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by modifying the field indicating the current page number.

Note

the navigation through the pages of the asset grid is not retained as a contextual element of work. This means that when you leave the page to edit an asset form for example, and you go back to the page of the asset grid, then the page number returns to the initial configuration, which is set to page " 1 ".

Browsing the asset catalog by category

In the left panel of the asset grid, stands the asset tree 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 text over the full width of the page. For this, 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 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.

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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 in 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

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assets" category.

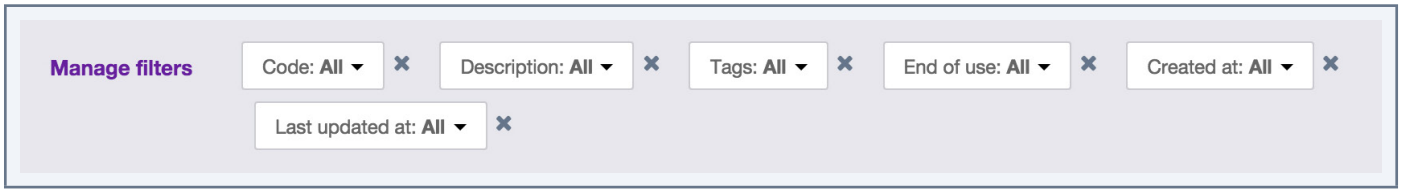
View all the assets of the catalog

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 located: 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.

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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.

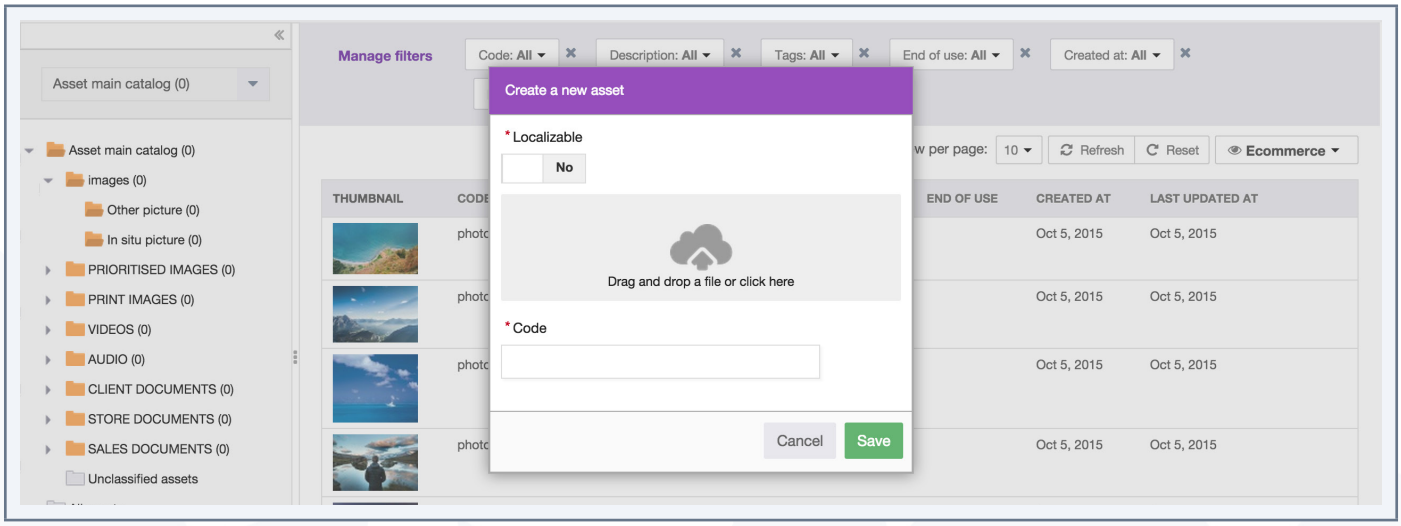
Create an asset

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.



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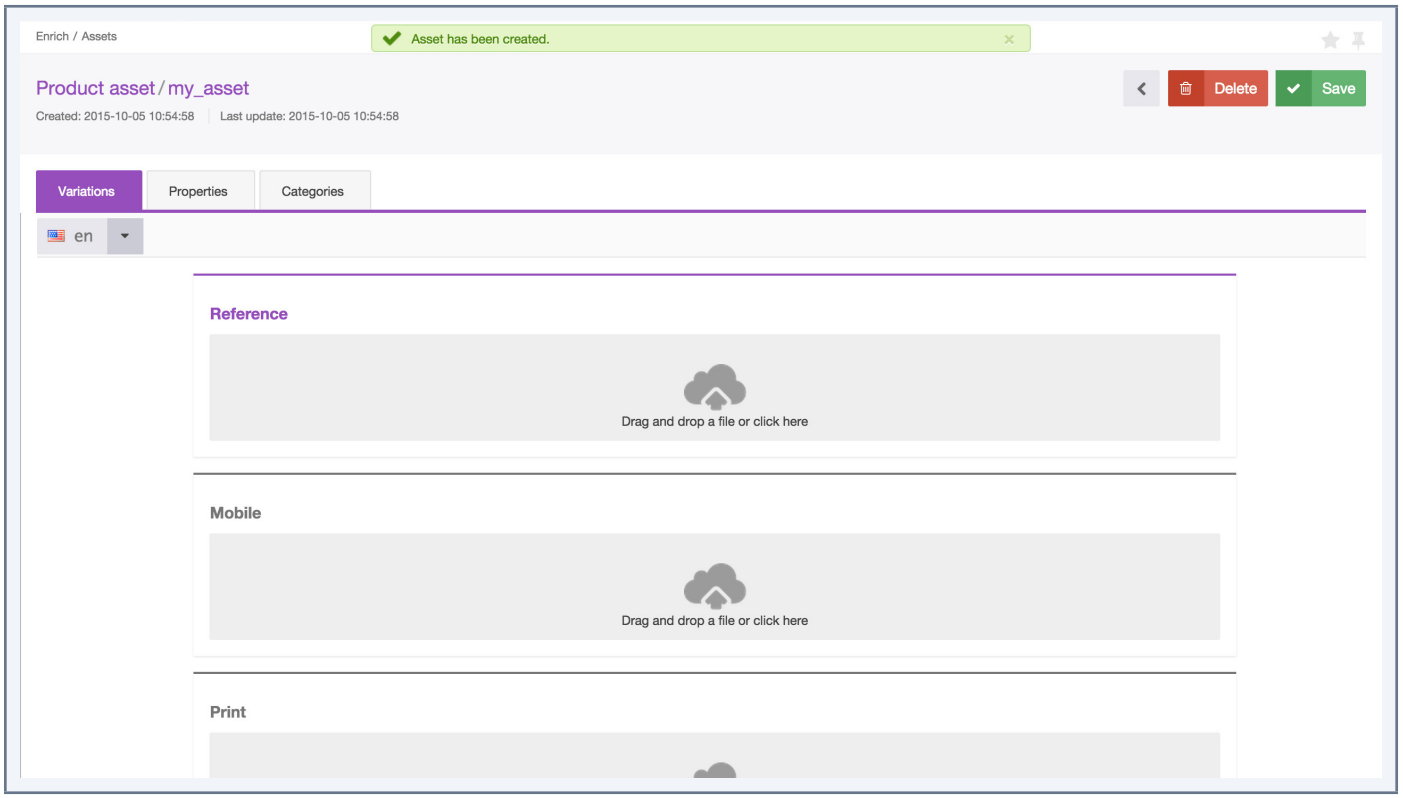
3. If a file is uploaded as a reference file, a code is automatically generated based on the given filename. If not, the user has to put a code for the asset.
4. Click on the “save” button.

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



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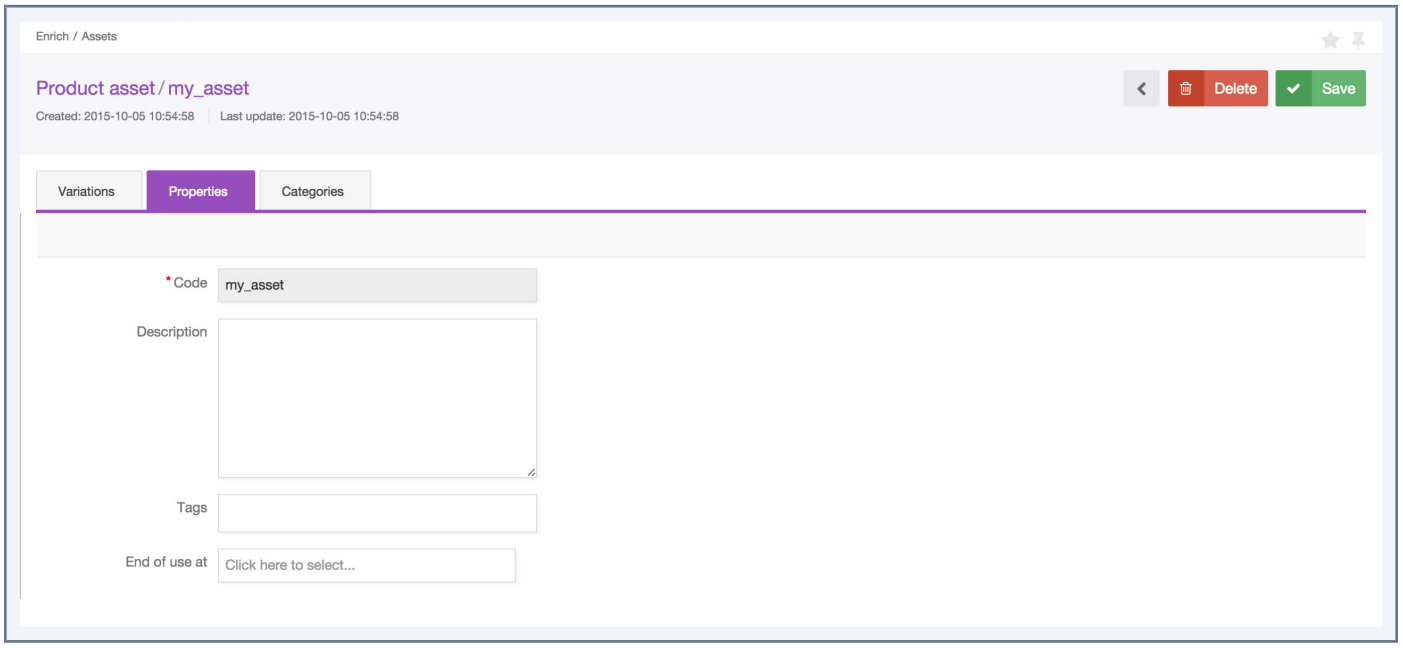
WORKING ON THE ASSETS

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.

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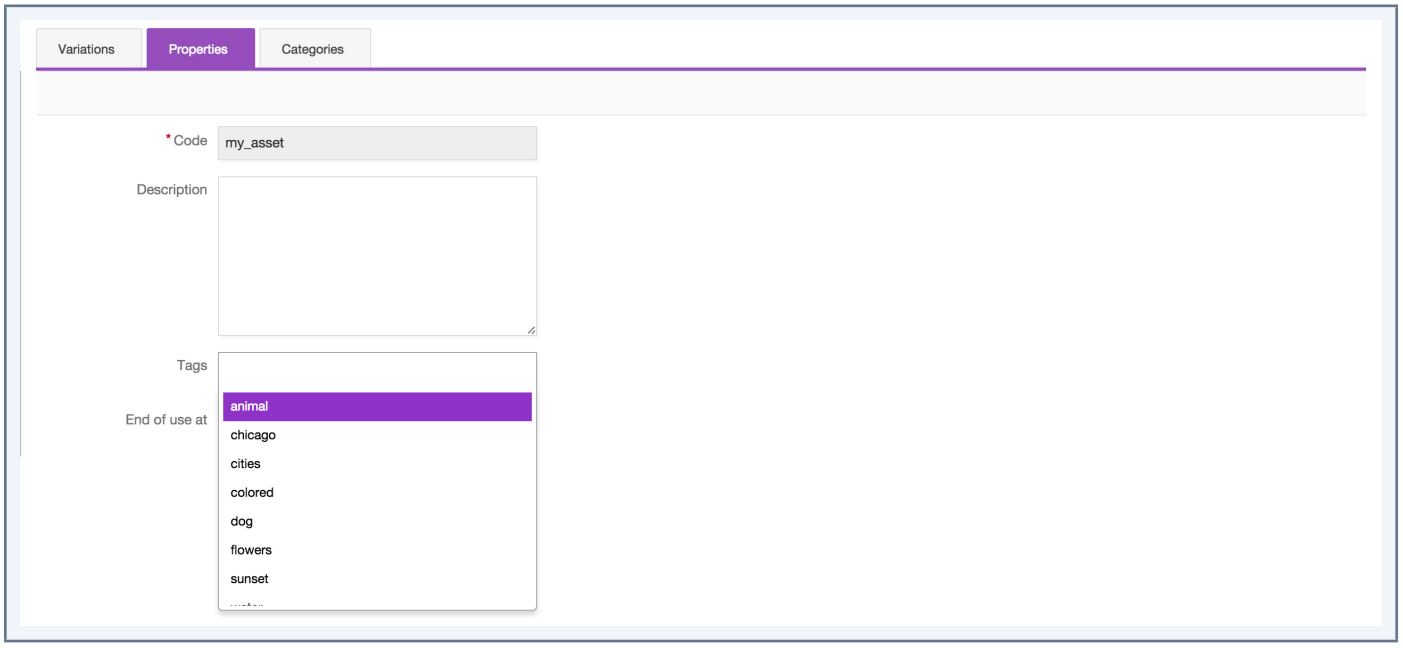
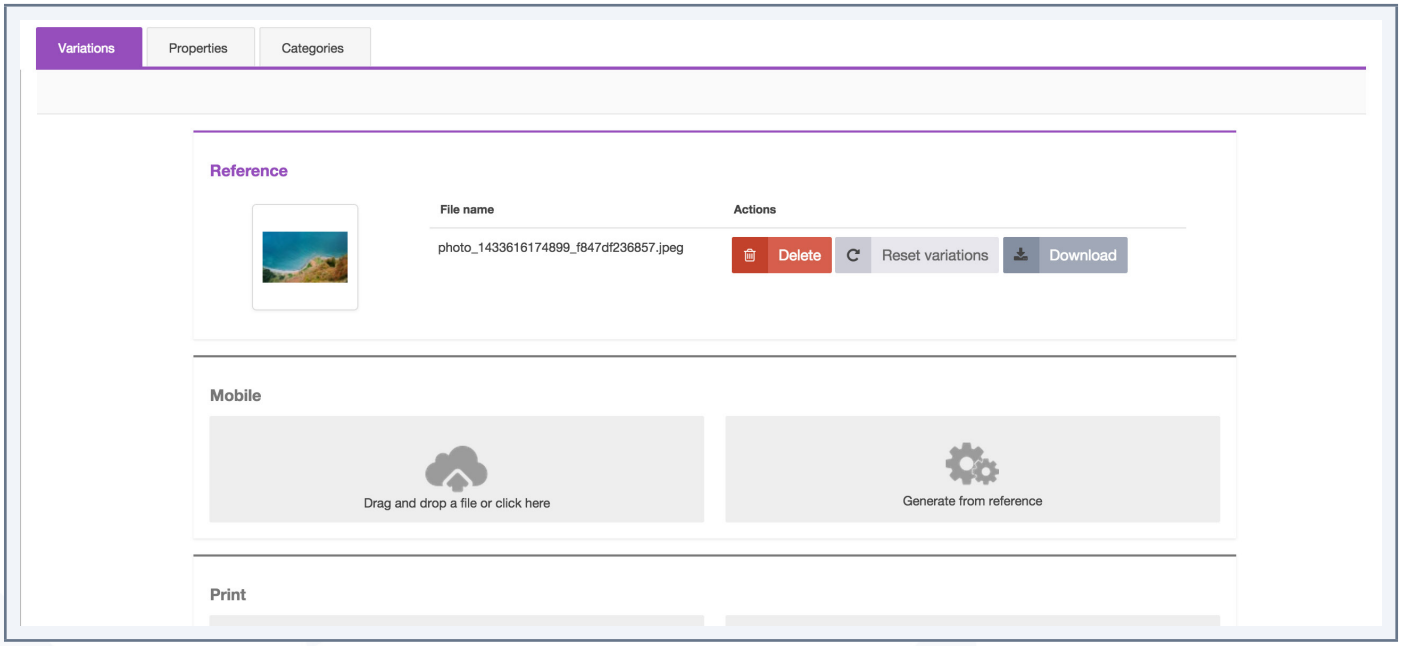


Edit the files of an asset

1. Click on the tab “Variations”.



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

Add a reference file

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

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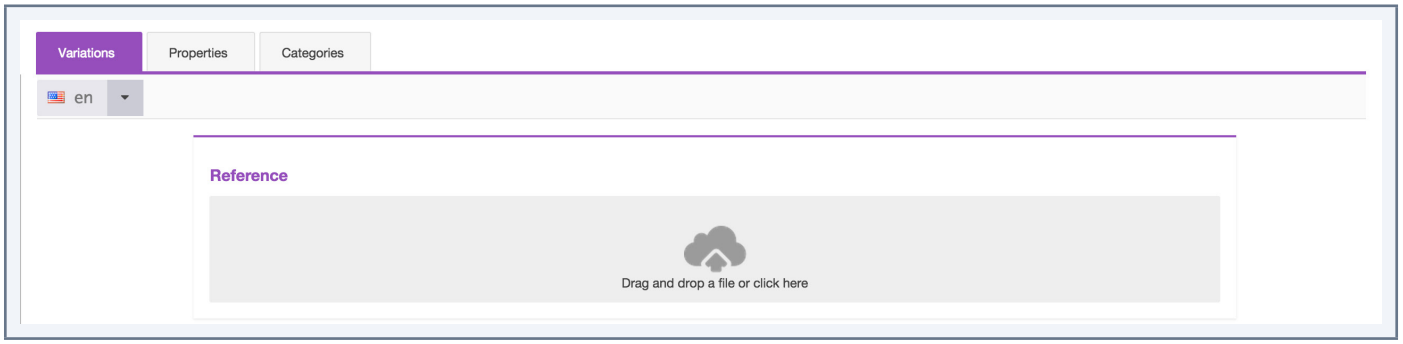


2. Click on the button “save”.

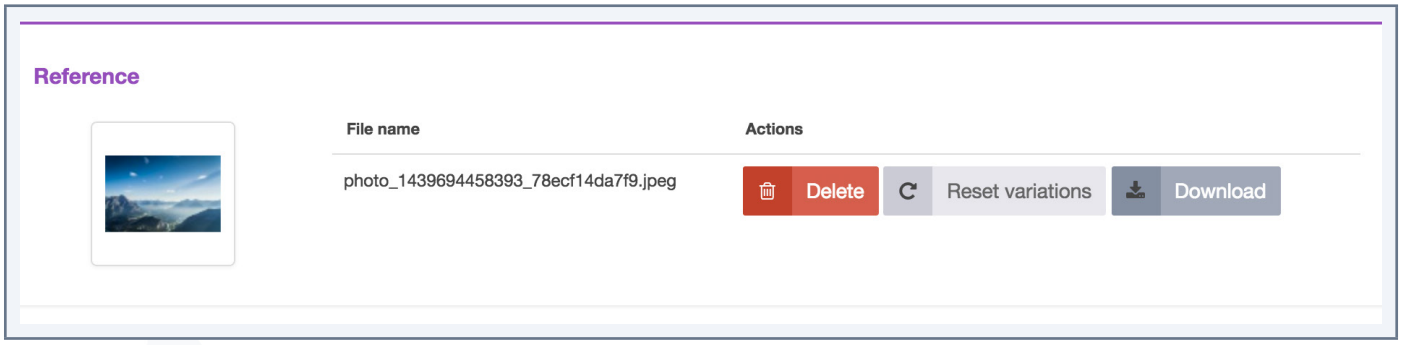
Note

The loading time depends on the size of the file and the complexity of the transformations to apply x 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 button “download”.



Delete a file (reference or variation)

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

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Note

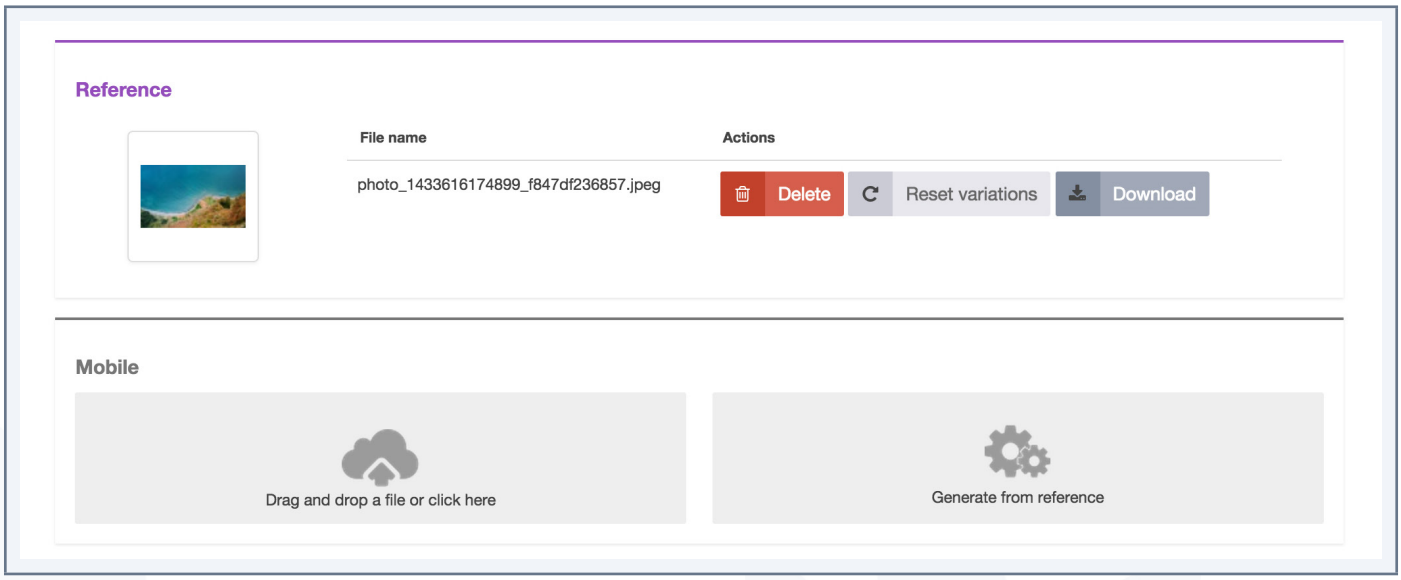
If you delete the reference file, the variation files are not updated.

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 button “Generate from the reference file”.



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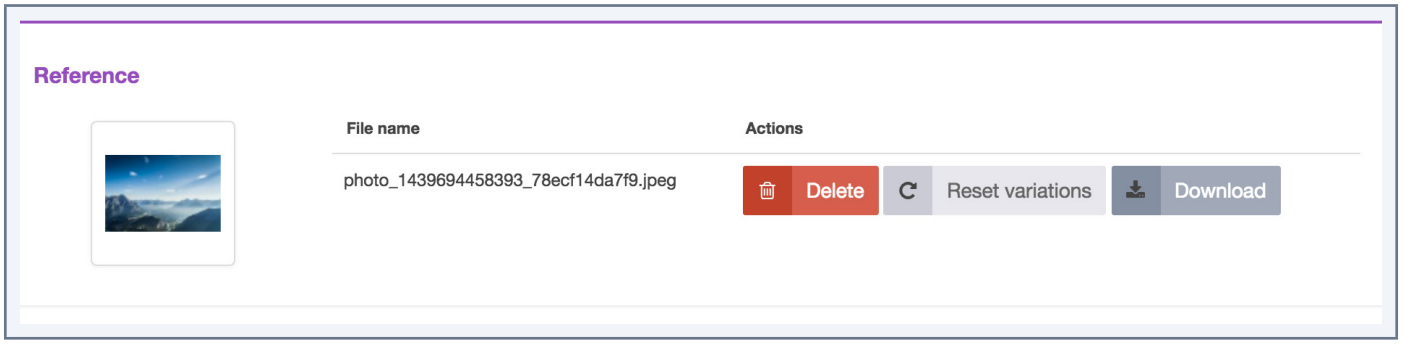
Note

This option is not displayed if there is not a reference file.

Generate variation files from the reference file automatically

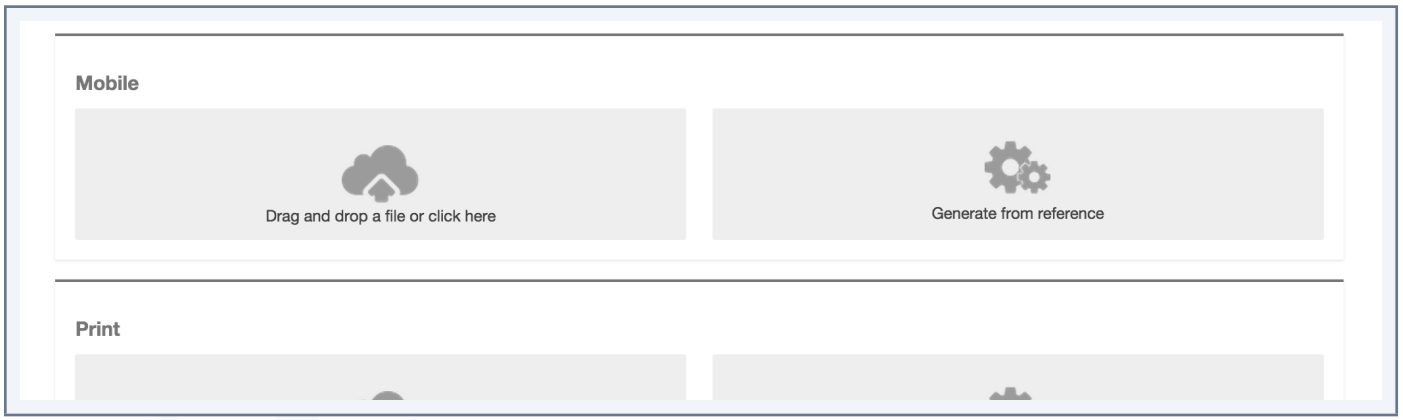
1. Click on the button “Reset variations”.



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

Upload a variation file manually

1. Drag & 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 button “save”.

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 .

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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.

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

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.

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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 :

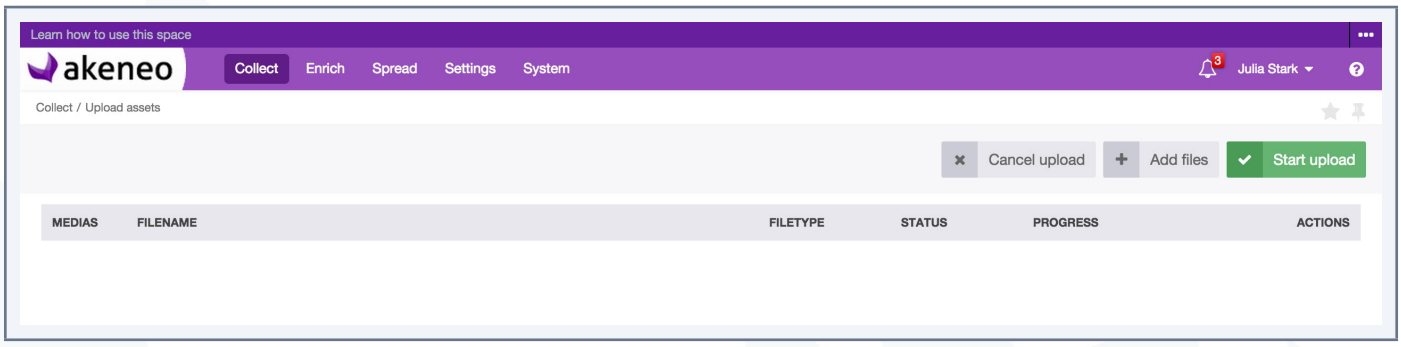
- If the asset with the code “demo_video” already exists
  - If Yes, the PIM will update the asset with the code “demo_video” by importing the file “demo_video.wmv” as its reference file (and generate the variation files accordingly).
  - If No, the PIM will create a new asset with the code “demo_video” 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 & drop your asset files in the page or click on the button “Add files” to open the dialog box and select the asset files you want to upload.

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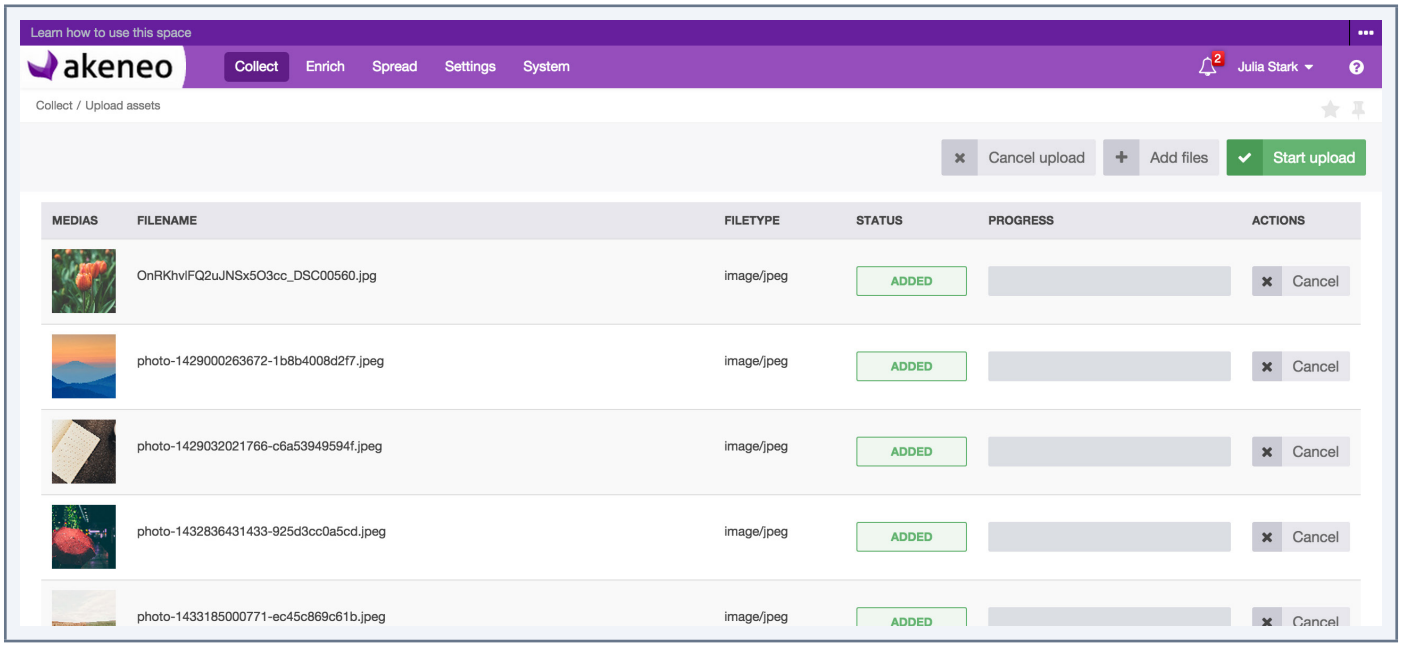
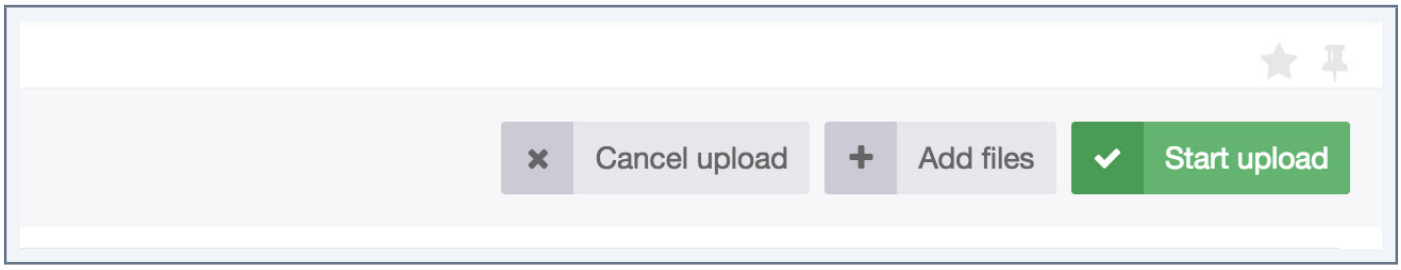
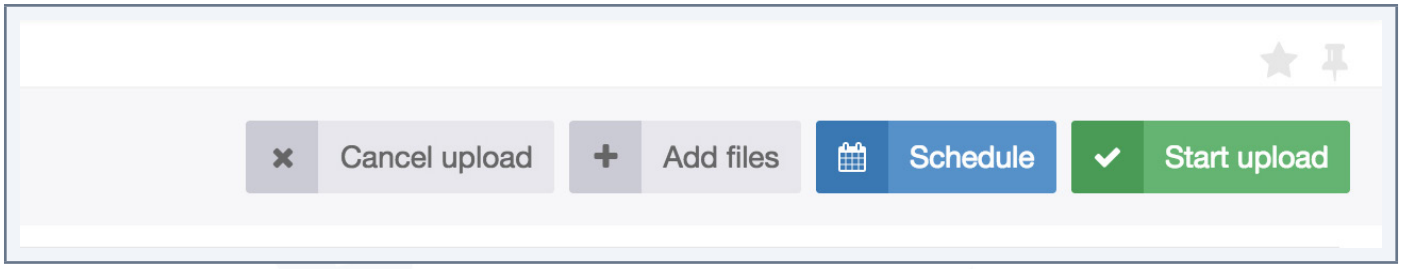


3. Click on the button “Start upload” to upload assets.



4. Click on the button “Schedule” to launch the import of 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 status “SUCCESS”, they are still available even if you logout or move

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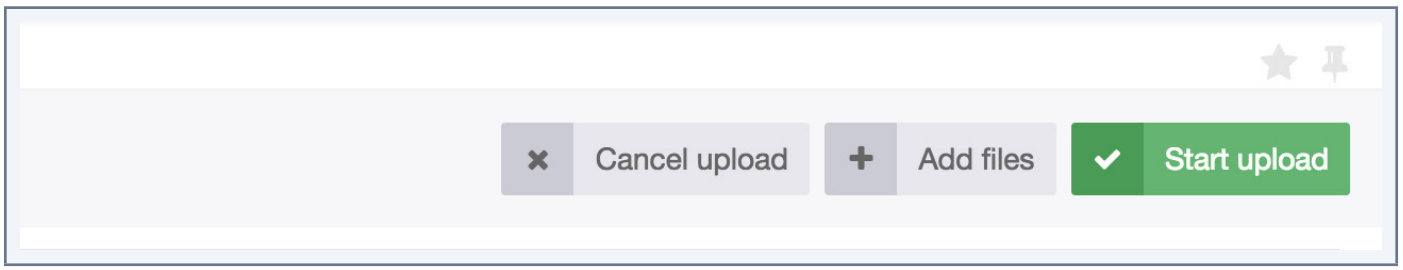
to another page.

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 button “Cancel” in the row. The file will be removed and will not imported.

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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 file import process consist 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 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 CSV connector to import CSV 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 menu “Collect > Import Profiles” to see the list of the import profiles available
2. Select the import profile you want to execute, then click on the relevant line

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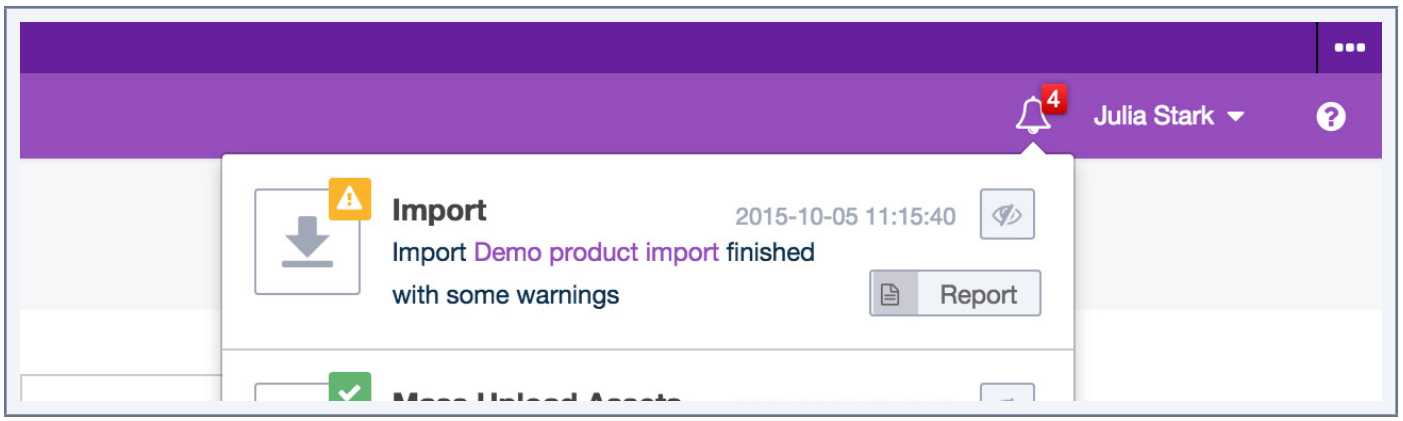
3. The page for the import profile is prompted. Click on the “Import” or “Upload and import” button if the connector enables to load a file from the PIM interface.
4. The page of the import execution is displayed. The page refreshes continually to update the information displayed.

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 technical documentation of the PIM application.

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EXPORT PRODUCTS

Exporting products is pretty convenient if you want to disseminate your catalog to third parties: E-commerce platform, mobile application, etc.

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

- can be executed directly from the user interface Akeneo PIM (file download)
- or from a given path in the configuration of the export profile, enabling the Akeneo PIM to 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).

The export process involves:

1. Creating an export profile. Please refer to the administration guide for this step.
2. Starting the export CSV file.

You can change the export configuration under the export 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 CSV connector Akeneo to export CSV files.

Note

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

Launch a product export

To launch a product export

1. Go to the menu “Collect > Export Profiles” to see the list of the export profiles available
2. Select the profile you want to execute, then click on the relevant line.
3. The page of the export profile 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.

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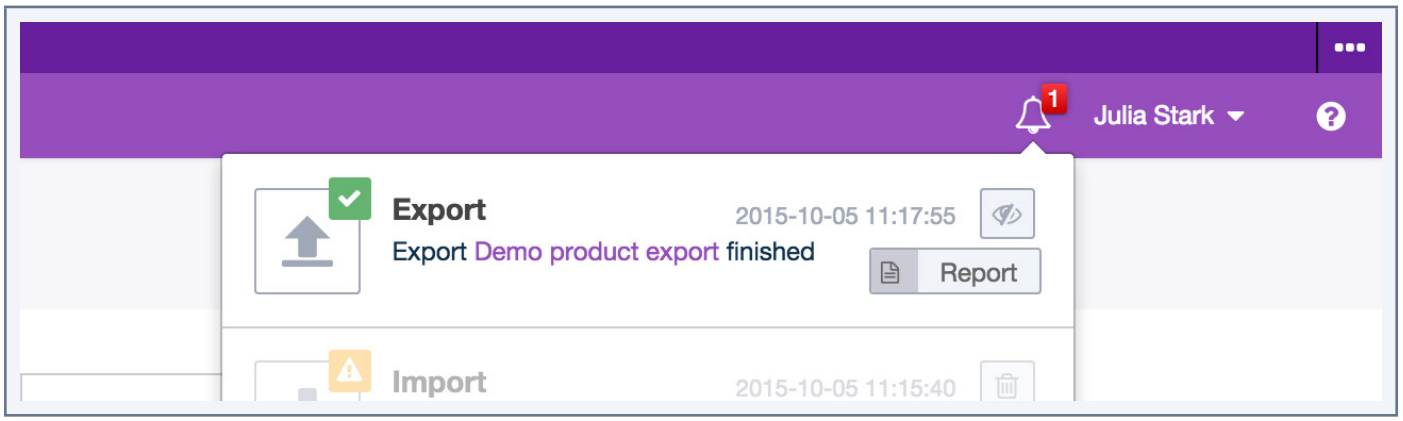
When the export has ended, a notification is available on the top right of the Akeneo PIM



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

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THANK YOU.

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