Module 04
Products

Module 04: Products

❏ **Introduction**

BigCommerce offers robust and scalable tools for managing even the largest and most complex product catalogs. In this module, you will create categories to organize your products, product options, and product filters that allow shoppers to easily find products they're looking for fast.

In this module, you will create, edit, and delete products and categories, explore product attributes, create variations using options and rules and SKUs, and explore Product Filtering.

❏ **Learning Objectives**

After completing this module, you should be able to:

- Delete categories
- Rearrange categories
- Modify the default product sort of a category
- Describe the limits for category, product, brand, SKU, page, and product option values
- Define "SEO" and "crawl"
- Identify where page titles and meta descriptions appear in search results
- Create custom page titles and meta descriptions for categories
- Describe how a robots.txt file is used by search engines
- Create a product from the control panel
- Add a SKU, dimensions, description, images, brand, and bulk pricing to a product
- Add a custom page title and meta description to a product
- Adjust the sort order of product images
- Create alt and description attributes for product images

- Create a downloadable product
- Feature specific products
- Toggle a product's visibility
- Create SKUs to track inventory
- Use the Auto-SKU Generator
- Assign stock levels to SKUs
- Hide or mark out of stock products
- Use rules to change a product's price, display a new image, or adjust the product's weight
- Create rules that apply to an option on a specific product
- Create rules that apply to a SKU on a specific product
- Create rules that apply to options on all products using the same option set
- Describe Product Filtering/Faceted Search
- Identify which pricing plans include Product Filtering
- Enable and configure Product Filtering on a store
- Create filters using Options and Custom Fields

❏ **Lessons**

This module includes the following lessons:

Lessons
Lesson 1: Categories
Lesson 2: Basic SEO
Lesson 3: Basic Product Creation
Lesson 4: Special Features of Products
Lesson 5: Options
Lesson 6: SKUs and Inventory Tracking
Lesson 7: Rules
Lesson 8: Product Filtering

Products Lesson 01: Categories

❏ Introduction

Categories let you create a custom system for organizing your products and give your customers a better experience. Clear and concise categories make your online store's navigation intuitive.

We recommend planning your category structure before adding products. You can always add a category while adding products or alter categories later.

In this lesson you will delete, rearrange, create, and modify categories.

❏ Learning Objectives

After completing this lesson, you should be able to:

- Delete categories
- Rearrange categories
- Modify the default product sort of a category
- Describe the limits for category, product, brand, SKU, page, and product option values

❏ Content

This lesson includes the following content:

Content
Video: Product Categories
Lab Activity: Product Categories

❏ Reference

This lesson may reference the following content

Reference
KB Article: Product Categories https://support.bigcommerce.com/articles/Public/Product-Categories/
KB Article: Limits for Brands, Categories, SKUs, Pages and Product Option Values https://support.bigcommerce.com/articles/Public/Platform-Limits/

Video: Product Categories

❏ Video

Watch the *Product Categories* video on YouTube: https://youtu.be/_KMh8yqDSlg

❏ Notes

Use the area below for writing down any notes or key takeaways from the video:

Build-A-Store: Product Categories

Duration: 10 minutes

In this lab you will...
- Delete categories and assign products to a new category
- Delete categories and the contained products
- Create top-level categories
- Adjust parent-child category relationships
- Configure the sort order of products in a category

Complete These Steps

1. **Delete** categories and **assign** products to a new category

> ℹ The following steps will show you how to delete a category while assigning the products in that category to another category. This assumes you have not deleted or modified the sample products and categories provided with the trial store.

   a. **Navigate** to *Products > Product Categories*
   b. **Click** the checkboxes to the left of *Shop All* and *Bath*
   c. **Click** the trash can (delete) button
   d. In the *Reassign Products in Categories Marked for Deletion?* modal, **click** another category like Garden or Kitchen
   e. **Click** the *Continue* button
   f. **Review** the messaging in the *Please Confirm Your Selection* modal
   g. **Click** the *Delete Selected Categories* button

2. **Delete** categories and the contained products
   a. **Click** the checkbox above all categories to select all categories
   b. **Click** the trash can (delete) button
   c. In the *Reassign Products in Categories Marked for Deletion?* modal, **select** *Delete products in these categories*
   d. **Click** the *Continue* button
   e. **Review** the messaging in the *Please Confirm Your Selection* modal
   f. **Click** the *Delete Selected Categories* button

Deleting all categories from the store requires all products to also be deleted. What does this tell you about the relationship between products and categories?

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3. **Create** top-level categories

   a. **Click** the *Create a Category* button

   > ⓘ Categories are the primary way shoppers will navigate your product catalog. Begin thinking about how you would like to present your catalog to shoppers. But, if you are still unsure how you would like to organize your products, use placeholder names like "Category 1", "Category 2" and so on.

   b. **Type** the name of a category
   c. **Click** into the WYSIWYG editor next to *Description*

   > ⓘ At this point, a human-readable URL should be auto-generated using the text entered in the Name field. For more information on the benefit of auto-generating URLs based on the category name, check out a resource like https://moz.com/learn/seo/url.

   d. **Type** a brief description of your category, or enter some placeholder text
   e. **Click** the *Save & Add Another* button
   f. **Repeat** steps 3.b-3.d to create a second category
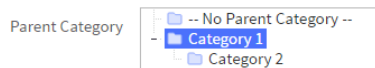   g. **Click** the *Save & Exit* button

4. **Adjust** parent-child category relationships

   a. On the *Product Categories* page (*Products > Product Categories*), **click and drag** the second category.
   b. **Release** it below and slightly to the right of the other category. This should make one category the child of the other.

   Example:
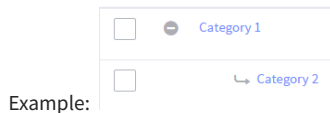
   > ⓘ Parent categories are sometimes called Top-Level categories. Child categories are sometimes called Subcategories.

   c. **Repeat** steps 3.a - 3.d to begin creating a new child category
   d. **Click** an existing category in the *Parent Category* list to make this new category a child or grandchild category

   e. **Click** the Save & Exit button
   f. **Continue** creating categories and arranging them until you are satisfied
      i. *Remember, you can always revisit your category structure later*

5. **Configure** the sort order of products in a category

> A category's default product sort will let you determine the order in which your products are displayed on that category. For example, you may want to highlight products with the highest rating, those with the lowest price, or simply display your products alphabetically.

     a. On the *Product Categories* page (*Products > Product Categories*), **click** the name of a category to edit it
     b. **Select** the desired value for *Default Product Sort*

> If you would like all categories to use the Default Product Sort, you can use the storewide *Default Product Sort* settings in the *Category Settings* section of *Store Setup > Store Settings > Display*. The category-level setting will affect only the individual category's sort.

> Setting Default Product Sort to *Featured Items* will not actually display featured products first. Instead, it will display products in an order based on the *Sort Order* setting on the Other Details tab of the Add/Edit a Product page

Products Lesson 02:
Basic SEO

❏ Introduction

Search Engine Optimization (SEO) is instrumental in boosting traffic to your online business. With a site optimized for search engines, you'll rank higher in search results and increase the chances of a potential shopper finding you.

All BigCommerce sites are designed to rank well in search engines with optimized URL structures, full metadata access, site-wide HTTPS, and fast page loads.

In this lesson you will explore basic SEO concepts and create custom page titles and meta descriptions.

❏ Learning Objectives

After completing this lesson, you should be able to:

- Define "SEO" and "crawl"
- Identify where page titles and meta descriptions appear in search results
- Create custom page titles and meta descriptions for categories
- Describe how a robots.txt file is used by search engines

❏ Content

This lesson includes the following content:

Content
Glossary: SEO
Video: Getting Started with SEO
Lab Activity: Demonstrate SEO Features with Categories

❏ Reference

This lesson may reference the following content

Reference
KB Guide: What is SEO?   https://support.bigcommerce.com/articles/Learning/What-is-SEO/
KB Guide: Things to Know   https://support.bigcommerce.com/articles/Learning/Things-to-Know/
KB Guide: SEO Fields > Metadata   https://support.bigcommerce.com/articles/Public/SEO-Fields/#metadata
KB Article: 301 Redirects   https://support.bigcommerce.com/articles/Public/301-Redirects/

Glossary: SEO

SEO (Search Engine Optimization) – a methodology of strategies, techniques and tactics used to increase the amount of visitors to a website by obtaining a high-ranking placement in the search results page of a search engine (SERP) -- including Google, Bing, Yahoo and other search engines

301 Redirect - a method of telling web browsers and search engines that a web page or site has been permanently moved to a new location. Usually a 301 redirect includes the address to which the resource has been moved

Bounce Rate - the percentage of visitors to a particular website who navigate away from the site after viewing only one page

Crawler - software that looks at webpages and follow links on those pages, much like you would if you were browsing content on the web. They go from link to link and bring data about those webpages back to a search engine's servers. Sometimes called a spider.

Human-Readable URL (Semantic URL) - also sometimes referred to as clean URLs, RESTful URLs, user-friendly URLs, or search engine-friendly URLs, are Uniform Resource Locators (URLs) intended to improve the usability and accessibility of a website or web service by being immediately and intuitively meaningful to non-expert users

Keyword Research - a practice search engine optimization (SEO) professionals use to find and research actual search terms that people enter into search engines

Keyword Stuffing - a search engine optimization (SEO) technique, in which a web page is loaded with keywords in the meta tags or in content of a web page. Keyword stuffing may lead to a website being banned or penalized in search ranking on major search engines either temporarily or permanently.

Long Tail Keyword - a keyword phrase that contains at least three words used to target niche demographics rather than mass audiences; more specific and often less competitive than generic keyword terms

Meta Description - a ~160 character snippet, a tag in HTML, that summarizes a page's content. Search engines show the meta description in search results mostly when the searched for phrase is contained in the description

Meta Keywords - A series of keywords you deem relevant to the page in question; an example of a meta tag that doesn't make much sense to use these days. (see *Keyword Stuffing* above)

Organic Search Results - listings on search engine results pages that appear because of their relevance to the search terms, as opposed to their being advertisements. In contrast, non-organic search results may include pay per click advertising.

Page Title - text marked up in HTML that appears in the title bar of browsers. Search engines display page titles in their search results. In addition, search engines use page titles in order to recognize what information the website contains. Ideally page titles should include the search term for which the website has been optimized.

PPC (Pay Per Click) - also known as cost per click (CPC); an internet advertising model used to direct traffic to websites, in which an advertiser pays a publisher (typically a website owner or a network of websites) when the ad is clicked.

Robots.txt - The robots exclusion standard, also known as the robots exclusion protocol, is a standard used by websites to communicate with web crawlers and other web robots. The standard specifies how to inform the web robot about which areas of the website should not be processed or scanned.

SEM (Search Engine Marketing) - a type of Internet marketing associated with the researching, submitting and positioning of a website within search engines to achieve maximum visibility and increase your share of paid and/or organic traffic referrals from search engines; a form of Internet marketing that involves the promotion of websites by increasing their visibility in search engine results pages (SERPs) primarily through paid advertising.

SERP (Search Engine Results Page) - the list of results that a search engine returns in response to a specific word or phrase query

Video: Getting Started with SEO

❏ Video

Watch the *Getting Started with SEO* video on YouTube:
https://youtu.be/eW_0t0ZcsOs

❏ Notes

Use the area below for writing down any notes or key takeaways from the video:

Build-A-Store: SEO & Categories

Duration: 5 minutes

In this lab you will...
- Automatically update a category URL while redirecting the old URL to the new one
- Locate 301 redirects in the control panel
- Observe a redirect

Prerequisites
1. *Build-A-Store: Product Categories*

Complete These Steps

1. Automatically **update** a category URL while **redirecting** the old URL to the new one
   a. **Navigate** to *Products > Product Categories*
   b. **Click** a category's name to edit the category

> ⓘ The next step assumes you have not altered the originally auto-generated category URL. If the URL does not automatically update when the Name is modified, click the *Reset* link next to the URL field

   c. **Type** a new category name into the Name field
   d. **Click** into the Description field
   e. **Ensure** the URL is automatically updated and a *Redirect old URLs to this URL automatically (recommended)* checkbox is

Name	Category 1-Updated
URL	/category-1-updated/ Reset ❓
	☑ Redirect old URLs to this URL automatically (recommended) ❓

   exposed and checked
      i. *If you do not see an automatically updated URL and checkbox, click the "Reset" link next to the URL field and repeat step 1.e*
   f. **Click** the *Save & Exit* button

Why is auto-redirecting the old category URL useful in most situations? When might this not be useful?

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2. **Locate** 301 redirects in the control panel

    a. **Navigate** to *Server Settings > 301 Redirects*

    b. **Confirm** the redirect created in step 1.f is present

	Old URL	Redirect Type	New URL	Action
	/category-1/	Dynamic Link ▾	Category: Category 1-Updated (Change)	•••

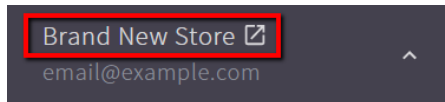   c. **Copy** the value in the *Old URL* field for the redirect created in step 1.f

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BigCommerce supports Manual and Dynamic redirects. What is the difference between these types of redirects?

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3. **Observe** a redirect

    a. **Click** the View Store link in the lower-left corner of the control panel

> Brand New Store 🗗
> email@example.com   ^

    b. **Delete** all text after *.com* in your browser's address bar

    c. **Paste** the *Old URL* copied in step 2.c into the address bar after *.com*

    d. **Press** enter/return to navigate to the URL

ⓘ Because of the 301 redirect created in step 1.f, your browser should be automatically redirected from the URL you entered to the updated category URL.

Products Lesson 03:
Basic Product Creation

❏ Introduction

Whether you're adding a handful of products or are just getting started with BigCommerce, manually adding your products may be best. By manually adding your products, you'll get a feel for the comprehensive fields available to help you customize your product listings.

BigCommerce also supports importing products using a CSV file and creating products using the API.

In this lesson you will create products and basic product attributes through the control panel. Later in this course, you will import products using a CSV file. Creating products using the API is not covered in this course.

❏ Learning Objectives

After completing this lesson, you should be able to:

- Create a product from the control panel
- Add a SKU, dimensions, description, images, brand, and bulk pricing to a product
- Add a custom page title and meta description to a product
- Adjust the sort order of product images
- Create alt and description attributes for product images

❏ Content

This lesson includes the following content:

Content
Video: Adding a Products
Lab Activity: Adding Products part 1

❏ Reference

This lesson may reference the following content

Reference
KB Article: Adding a Product https://support.bigcommerce.com/articles/Public/Adding-Products/
KB Article: Product Descriptions Best Practices https://support.bigcommerce.com/articles/Public/Product-Descriptions-Best-Practices/
KB Article: Options, SKUs, and Rules > Creating SKUs https://support.bigcommerce.com/articles/Public/Options-SKUs-Rules#skus
KB Article: Using the WYSIWYG Editor https://support.bigcommerce.com/articles/Public/Using-the-WYSIWYG-Editor/

Video: Adding a Product

❏ Video

Watch the *Adding a Product* video on YouTube: https://youtu.be/ywQqs0qJYAw

❏ Notes

Use the area below for writing down any notes or key takeaways from the video:

Build-A-Store: Add Products part 1

Duration: 15 minutes

In this lab you will...
- Create two products with required fields
- Add attributes on the Details tab
- Add attributes on the Images & Videos tab
- Add attributes on the Other Details tab
- Add attributes on the Bulk Pricing tab

Prerequisites
1. *Build-A-Store: Product Categories*

Background

You are about to begin adding new products to your store. This will bring you through the basic steps to create products using the control panel. Later in this course, you will learn how products can be created in bulk by importing a CSV file.

Create at least one product that you will add size and color options to later. An example would be a t-shirt that comes in multiple sizes and colors. In a later activity, you will see how you can apply an option set to a product to create variations.

Later in this course, you will modify the robots.txt file for your store to prevent search engines from indexing your product pages. Because of this, do not spend too much time or effort crafting SEO friendly descriptions and meta attributes.

Complete These Steps

1. **Create** 2 products

> A merchant may complete these steps in a different order. This activity begins by completing only the required fields to save a product, then adding additional attributes like images, a brand, and bulk pricing.

   a. **Navigate** to *Products > Add*
   b. **Type** the name of a product in the *Name* field
   c. **Type** the product's price in the *Price* field
   d. **Click** the checkbox for one or more categories
   e. **Type** a number in the *Weight* field
      i. You can use up to two decimal places
      ii. If you would like to change the unit of weight, you can in *Store Setup > Store Settings* on the *Website* tab
   f. **Click** the *Save* button
   g. After reading the warning, **click** the Continue button on the "*Wait! You Didn't Enter All Physical Dimensions*" modal

> At this point, you have entered the minimum required attributes to create a product using the control panel: Name, Price, Category, and Weight

2. **Add** attributes on the Details tab

   a. **Type** a unique code you can use to identify this product into the *Product code/SKU* field
      i. *Example SKUs:*
         1. BRWN-TSHIRT-50527
         2. KTBX-0009-TSU
         3. GMM-026

b. **Type** values for *Width*, *Height*, and *Depth*
    i. If you would like to change the unit of distance, you can in *Store Setup > Store Settings* on the *Website* tab
c. **Add** some content to the *Description* field including:
    i. descriptive text
    ii. an image

> (i) Check out the Using the WYSIWYG Editor KB article (https://support.bigcommerce.com/articles/Public/Using-the-WYSIWYG-Editor/) for more information on using the WYSIWYG editor in the *Description* field

d. **Click** the *Save* button

3. **Add** attributes on the Images & Videos tab

a. **Click** the *Images & Videos* tab
b. **Add** at least two images to the product
c. **Type** a short description of each image in the *Description* field beside each image
d. **Click** the *Save* button for each description
e. **Click** the *Use as Thumbnail?* radio button for the image you want to use as the primary product image
f. If necessary, **click and drag** the rows for images into the desired order
g. **Click** the *Save* button

4. **Add** attributes on the Other Details tab

a. **Click** the *Other Details* tab
b. **Type** or select a brand name in the *Brand Name* field

> (i) Try to keep your page title under 55 characters and your meta description between 150 and 160 characters. For information on this, check out the Title Tag (https://moz.com/learn/seo/title-tag) and Meta Description (https://moz.com/learn/seo/meta-description) articles on moz.com.

c. **Type** a descriptive title in the *Page Title* field
d. **Type** a descriptive meta description in the *Meta Description* field

5. **Add** attributes on the Bulk Pricing tab

a. **Enter** the quantity range that you want to be discounted
b. **Select** *Price Discount*, *Percentage Discount*, or *Fixed Price*
c. **Type** the value of the price, percentage, or fixed price discount

Purchases between 10 and 20 of this product will receive a Percentage discount of 5 % off each individual item

d. If you want to add additional ranges, **click** the addition symbol to the right of your discount
    i. To remove a range, click the subtraction symbol.

Percentage discount of 5 % off each individual item

6. **Repeat** steps 1-5 as desired

a. **Create** at least two products

Products Lesson 04:
Special Features of Products

❏ **Introduction**

Products can have several attributes beyond basic product details. These special features provide flexibility for additional use cases and also improve product discoverability.

In this lesson, you will create a downloadable product and manipulate additional settings on the product.

❏ **Learning Objectives**

After completing this lesson, you should be able to:

- Create a downloadable product
- Feature specific products
- Toggle a product's visibility

❏ **Content**

This lesson includes the following content:

Content
Lab Activity: Adding Products part 2

❏ **Reference**

This lesson may reference the following content

Reference
KB Article: Creating Downloadable Products https://support.bigcommerce.com/articles/Public/Creating-Downloadable-Products/
KB Article: Product Panels > Featured Products https://support.bigcommerce.com/articles/Public/Product-Panels/#featured-products

Build-A-Store: Add Products part 2

Duration: 5 minutes

In this lab you will...
- Create a downloadable product
- Feature a product
- Hide a product from the storefront

Prerequisites
1. *Build-A-Store: Add Products part 1*
2. *Build-A-Store: Product Categories*

Complete These Steps

1. **Create** a downloadable product

    a. **Navigate** to *Products > Add*

    b. **Add** a name, price, and category for the product

    c. **Select** *Downloadable product* in the *Product type* field

    > *When you select* Downloadable product*, some fields are removed from the Details tabs of the Add/Edit a Product page. Which fields are removed and why?*
    >
    > _____

    d. **Click** on the *Product Files* tab

    e. **Upload** a file from your computer

    f. **Click** the *Attach File to Product* button

    g. **Repeat** steps 1.e and 1.f if you would like to add multiple files to the product

    h. **Click** the downward facing arrow next to the *Save* button

   i. **Click** *Save & Close*
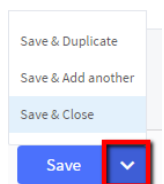
2. **Feature** a product

    a. On the View Products page, **click** the star icon to mark a product as featured

    b. **Repeat** step 2.a for each product you would like to appear in the Featured Products section of the homepage
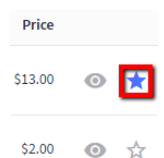
> (i) Remember, setting a category or store-level Default Product Sort to *Featured Items* will not actually display featured products first. Instead, it will display products in an order based on the *Sort Order* setting on the Other Details tab of the Add/Edit a Product page

3. **Hide** a product from the storefront

    a. On the View Products page, **click** the eye icon to hide a product from the storefront

    b. **Repeat** step 3.a for each product you would like to hide from the storefront
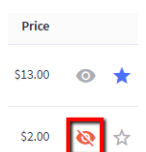
Products Lesson 05: Options

❏ **Introduction**

Product Options allow you to add variations to your product for customers to select. Popular examples include colors, sizes, yes/no checkboxes, or custom text fields.

Product options allow you to streamline product management and provide an engaging product page where shoppers can compare variations from a single location.

In this lesson, you will create size and color options, customizable text options, and use option sets to apply options to products.

❏ **Learning Objectives**

After completing this lesson, you should be able to:

- Create options for variations like size and color.
- Create options for custom variations like personalized messages.
- Create and edit combinations of options using option sets
- Apply option sets to products

❏ **Content**

This lesson includes the following content:

Content
Video: Product Options
Diagram: Products & Product Options
Lab Activity: Create Product Options

❏ **Reference**

This lesson may reference the following content

Reference
KB Article: Options, SKUs, and Rules https://support.bigcommerce.com/articles/Public/Options-SKUs-Rules
KB Article: Options, SKUs, and Rules > Creating Options https://support.bigcommerce.com/articles/Public/Options-SKUs-Rules/#creating
KB Article: Options, SKUs, and Rules > Option Sets https://support.bigcommerce.com/articles/Public/Options-SKUs-Rules/#sets

Video: Product Options

❏ Video

Watch the *Product Options* video on YouTube: https://youtu.be/Za05qPLsYFU

❏ Notes

Use the area below for writing down any notes or key takeaways from the video:

Diagram: Products & Product Options
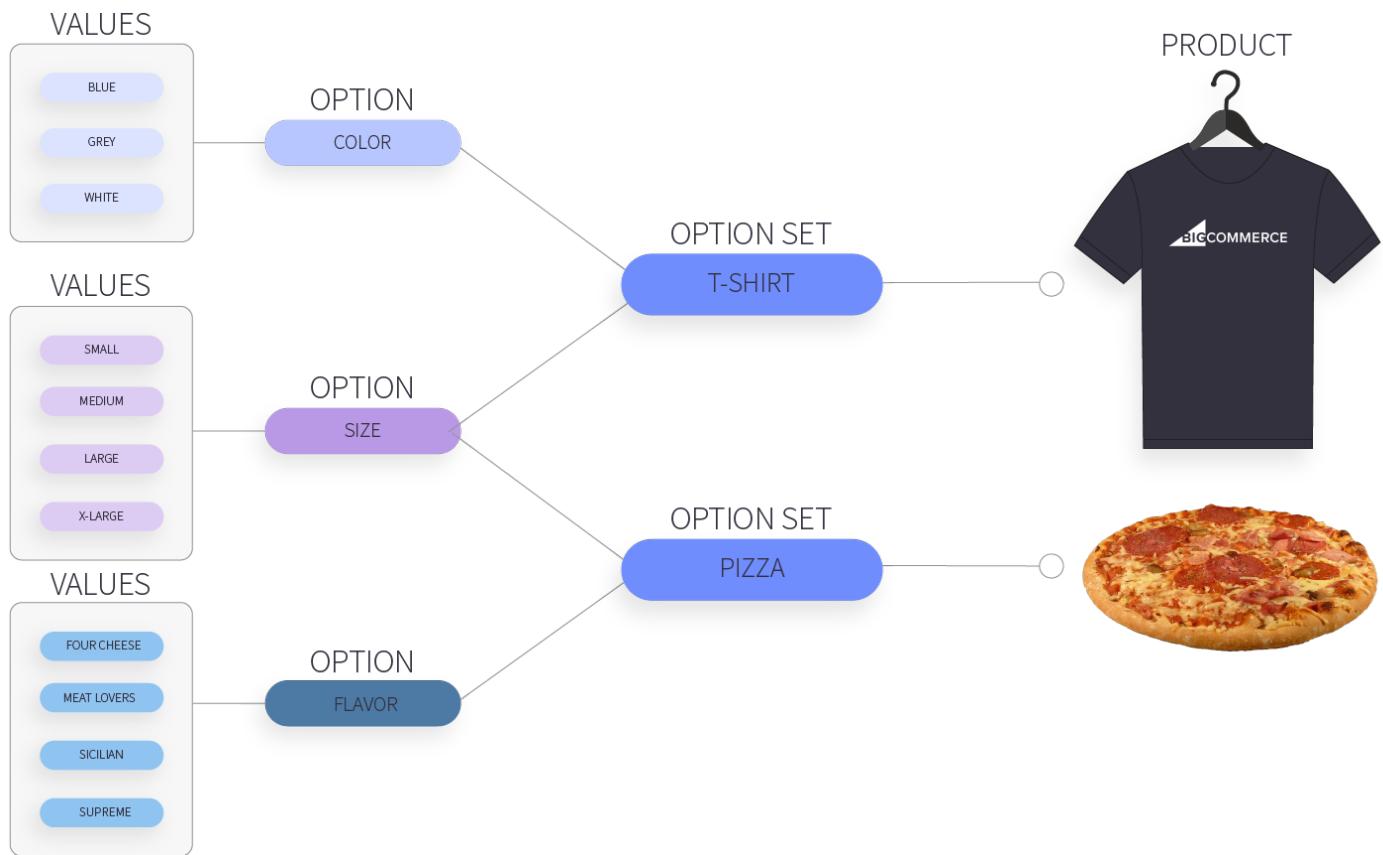
How do Product Options work?

Product options are organized in terms of what attributes your product variants have.

For example, you might have a product that comes in different sizes and colors. You would create an **Option** for each attribute (e.g. "Size" or "Color"). You will list the different values (such as "Blue" or "Green") inside the option. The Options are added an Option Set, which in turn can be applied to your products.

> **Value** - a specific attribute, like "green" or "small".
> **Option** - a collection of similar values, like "colors" or "sizes".
> **Option Set** - the group of Options you want to apply to your product(s). For example, a "Shirt" Option Set would contain the Option for color and the Option for size.

There's no limit to how many Option Sets you can create, but each product can only have **one** associated Option Set. You can also add the same Option Set to multiple products.

Build-A-Store: Create Product Options

Duration: 20 minutes

In this lab you will...
- Create a size option
- Create a color option
- Create an option set
- Apply the option set to a product
- Update an existing option

Prerequisites
1. *Build-A-Store: Add Products part 1*
2. *Build-A-Store: Product Categories*

Background

        In *Build-A-Store: Add Products part 1*, you created at least one product that you could add size and color options to later. In this activity, you will create and apply those size and color options. If you do not already have a product with a variable size and color, re-visit *Build-A-Store: Add Products part 1* and create one now.

Complete These Steps

1. **Create** a size option
   a. **Navigate** to *Products > Product Options*
   b. **Click** the *Create an Option* button
   c. **Click** the *Create your own* button
   d. **Type** a name you can use to identify this option later into the *Option name* field
   e. **Type** a name the shopper can use to identify the option into the *Display name* field
      i. Many merchants choose to use a call to action like "Choose a size" for the display name
   f. **Click** *Multiple Choice* in the *Display Type* field
   g. **Choose** a *Display Style*

> ℹ️ For examples of each display style, check out the Product Options: Multiple Choice KB article (https://support.bigcommerce.com/articles/Public/Options-SKUs-Rules/#mc)

   h. **Type** a single size value (example: Small) in the text field next to *List of Values*
   i. **Click** the addition symbol to the right of *Make Default* to add a new value
   j. **Repeat** the previous two steps until you have entered enough size values to be satisfied
   k. **Click** the *Next* button

> ℹ️ At this point, you could create an option set. However, for this exercise you will create an option set using an alternate workflow

On the second step of the Create an Option process, a checkbox labelled The option is required to complete checkout *is present and checked by default. This makes sense for an option like Size or Color because a merchant needs to know what size and color product to put in a box and ship to the shopper. What is an example of an option that a merchant may not want to require the shopper to complete?*

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      l.   **Click** the *Save* button

2. **Create** a color option
   a. **Click** the *Create an Option* button
   b. **Click** the *Create your own* button
   c. **Type** a name you can use to identify this option later into the *Option name* field
   d. **Type** a name the shopper can use to identify the option into the *Display name* field
      i. Many merchants choose to use a call to action like "Choose a color" for the display name
   e. **Click** *Swatch* in the *Display Type* field
   f. **Type** the name of a color in the *Swatch name* field
   g. **Click** the black swatch between the *Hex* text field and the addition symbol to open the color picker
   h. **Click and drag** the slider on the spectrum to choose a color
   i. **Click and drag** the selector in the palette to fine tune the color selection
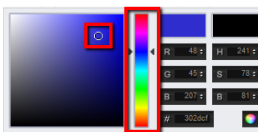
      i. Alternatively, If the RGB hex code for the desired color is known, you can type it into the *Hex* text field
   j. **Click** the addition symbol to the right of the swatch to add a new value
   k. **Type** two or three color names into the *Swatch name* field
      i. Examples:
         1. Purple & Gold
         2. Red, White, and Blue
   l. **Select** *Two Color* or *Three Color* from the select box on the new row
   m. **Repeat** steps 2.g - 2.i for each swatch on the new row
   n. **Click** the addition symbol to the right of the swatch to add a new value
   o. **Select** *Pattern* from the select box on the new row
   p. **Upload** an image to use as a pattern for your product
      i. Examples:
         1. Zebra print
         2. Paisley
   q. **Type** a description of the pattern into the *Swatch name* field
   r. **Click** the *Next* button
   s. **Click** the *Save* button

3. **Create** an option set

    a.   **Click** the *Option Sets* tab

    b.   **Click** the *Create a New Option Set* button

    c.   **Type** a name you can use to identify this option set later in the *Name* field

> ⓘ   The option set's name is not displayed to the shopper

    d.   **Click** the *Add* link to the right of the option names entered in the previous steps

> ⓘ   Clicking the Edit link to the right of option display names in the Options In This Set area of this page allows you to disable specific option values or toggle the Required setting on an option in this set

    e.   **Click** the *Save & Exit* button

4. **Apply** the option set to a product

    a.   **Navigate** to *Products > View*

    b.   **Click** the name of the product that will use the options to edit the product

    c.   **Click** on the *Options & SKUs* tab

    d.   **Select** the option set created in the previous steps from the *Option Set* select box

    e.   **Click** the *Save* button

    f.   **View** your storefront and locate the product

    g.   **Confirm** the options and values appear on the product page as expected

5. **Update** an existing option

    a.   **Navigate** to *Products > Product Options*

    b.   **Click** the Option Name for the Color option created in the previous steps

    c.   **Click** the addition symbol to the right of the swatch to add a new value

    d.   **Click** the black swatch between the *Hex* text field and the addition symbol to open the color picker

    e.   **Click and drag** the slider on the spectrum to choose a color

    f.   **Click and drag** the selector in the palette to fine tune the color selection

    g.   **Click** the *Next* button

    h.   **Click** the *Save* button

    i.   **View** your storefront and locate the product

    j.   **Confirm** the new color swatch appears on the product page

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Given that the new swatch is now present on the product page, what do you think the result would be if the same option were used in multiple option sets, or the option set was applied to other products?

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Products Lesson 06:
SKUs and Inventory Control

❏ Introduction

Stock keeping units (SKUs) are an alphanumeric code you can assign to variants of a product in order to track inventory.

With BigCommerce, you can attach SKUs to the base product as well as assign SKUs to each variation of your product options to track inventory for a single product, or multiple variations of a product simultaneously.

In this lesson, you will create multiple SKUs on a single product, track inventory using SKUs, and manage how products appear on the storefront when they are out of stock.

❏ Learning Objectives

After completing this lesson, you should be able to:

- Create SKUs to track inventory
- Use the Auto-SKU Generator
- Assign stock levels to SKUs
- Hide or mark out of stock products

❏ Content

This lesson includes the following content:

Content
Video: Product Options	SKUs & Inventory Tracking
Lab Activity: Create SKUs and Track Inventory

❏ Reference

This lesson may reference the following content

Reference
KB Article: Options, SKUs, and Rules > Creating SKUs https://support.bigcommerce.com/articles/Public/Options-SKUs-Rules#skus
KB Article: The Auto-SKU Generator https://support.bigcommerce.com/articles/Public/The-Auto-SKU-Generator/
KB Article: Inventory Tracking https://support.bigcommerce.com/articles/Public/Inventory-Tracking

Video: Product Options | SKUs & Inventory Tracking

❏ Video

Watch the *Product Options: SKUs & Inventory Tracking* video on YouTube: https://youtu.be/PxQb_difgNc

❏ Notes

Use the area below for writing down any notes or key takeaways from the video:

Build-A-Store: Create SKUs & Track Inventory

Duration: 10 minutes

In this lab you will...
- Manually create a SKU
- Auto-generate the remaining SKUs
- Enable inventory tracking by option
- Set stock levels from Edit a Product
- Set stock levels from View Products
- Hide out-of-stock products

Prerequisites
1. *Build-A-Store: Product Categories*
2. *Build-A-Store: Add Products part 1*
3. *Build-A-Store: Create Product Options*

Complete These Steps

1. Manually **create** a SKU

    a. **Navigate** to *Products > View*
    b. **Click** the name of a product with size and color options to edit the product
    c. **Click** the *Options & SKUs* tab on top
    d. **Click** the *SKUs* tab on the left
    e. **Click** the *Create a SKU* button
    f. **Type** a SKU in the *SKU* field using this naming convention: [some arbitrary text]-[first 3 letters of a size]-[first 4 letters of a color]
        i. Examples:
            1. SKU-LAR-BLUE
            2. TSHIRT-XL-GREE
            3. SOMETHING-SMA-BLAC
    g. **Click** the addition symbol to the left of the size option's display name in the *Options for this SKU* section
    h. **Click** the radio button for the size that corresponds to the size used in the *SKU* field
    i. **Click** the addition symbol to the left of the color option's display name in the *Options for this SKU* section
    j. **Click** the radio button for the color that corresponds to the color used in the *SKU* field
        i. Example: The SKU in the *SKU* field that corresponds to this screenshot is SKU-XS-GREE
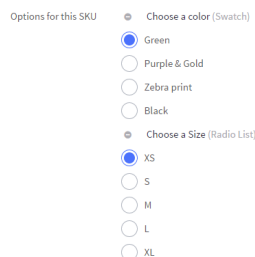
    k. **Click** the *Save and Close* button

2. **Auto-generate** the remaining SKUs
    a. **Click** the *Generate SKUs* button
    b. **Set** the arbitrary text prefix
        i. **Click** the *SKU* button under "Fixed text" (not the red X)
        ii. **Type** the arbitrary text prefix used in step 1.f into the text field between *Fixed text* and *Uppercase*
    c. **Set** the first three letters of the color option
        i. **Click** the *Auto-gen* button under "Unique ID" (not the red X)
        ii. **Select** the display name for the size option from the select box
        iii. **Type** *3* into the *letters* text box
    d. **Set** the first four letters of the color option
        i. **Click** the blue addition symbol
        ii. **Select** the display name for the color option from the select box
        iii. **Type** *4* into the *letters* text box
    e. **Click** the *Generate* button

> ℹ️ You should now have a SKU for each combination of color and size, but not all option types can be used to generate SKUs. See the The Auto-SKU Generator KB article (https://support.bigcommerce.com/articles/Public/The-Auto-SKU-Generator/) for more info

1. **Enable i**nventory tracking by option
    a. **Click** the *Inventory* tab toward the top of the Edit a Product page
    b. **Click** the radio button for *Track inventory by options (from the 'Options' tab above)*

2. **Set** stock levels from Edit a Product
    a. **Click** the Options & SKUs tab toward the top of the Edit a Product page

> ℹ️ You should now see a new *Stock* column in the list of SKUs on the SKUs tab.

    b. **Click** *edit* under the action button menu to the right of a SKU's stock level
    c. **Type** a value for Stock and a smaller value for Low Stock Level
    d. **Click** the *Save and Close* button
    e. **Repeat** the previous three steps for one or two more SKUs
    f. **Click** the downward facing arrow next to the *Save* button
    g. **Click** *Save & Close*

3. **Set** stock levels from View Products

    a. **Click** the addition symbol between the checkbox and the product image to expand the SKUs list for the product you were editing in the previous steps

    b. **Type** numbers in the *Current Stock* and *Low Stock Level* text fields for each SKU
        i. **Type** 0 for at least one SKU's *Current Stock*
    c. **Click** the *Save* button below the SKUs

4. **Hide** or **mark** out-of-stock products

    a. **Navigate** to *Advanced Settings > Inventory*
    b. **Select** "Hide the option" for *When an option is out of stock*
    c. **Configure** the remaining inventory settings as you see fit
    d. **Click** the *Save* button

Take a moment to view your product on the storefront. Choose a combination of options that is out of stock. When you choose the size option, the corresponding out of stock color should be removed and vice versa.

Products Lesson 07:
Rules

❏ Introduction

Product option rules are a way to change the product — such as price, weight, or image — depending on which options the customer selects. For example, if you sell T-shirts and want to change the product image depending on what color is selected, you would create a rule for each color.

BigCommerce offers this functionality out of the box and does not require any additional apps or subscription fees to create variable prices, weights, or images.

In this lesson, you will create rules to adjust a product's price, image, or weight that apply to specific products, SKUs, or all products using an option set.

❏ Learning Objectives

After completing this lesson, you should be able to:

- Use rules to change a product's price, display a new image, or adjust the product's weight
- Create rules that apply to an option on a specific product
- Create rules that apply to a SKU on a specific product
- Create rules that apply to options on all products using the same option set

❏ Content

This lesson includes the following content:

Content
Video: Product Options | Rules
Lab Activity: Create Price, Weight, and Image Change Rules

❏ Reference

This lesson may reference the following content

Reference
KB Article: Product Options | Rules https://support.bigcommerce.com/articles/Public/Options-SKUs-Rules#rules

Video: Product Options | Rules

❏ Video

Watch the *Product Options | Rules* video on YouTube:
https://youtu.be/qmyTdJqiuYo

❏ Notes

Use the area below for writing down any notes or key takeaways from the video:

Build-A-Store: Create Price, Weight, and Image Change Rules

Duration: 10 minutes

In this lab you will...
- Create a product-level image change rule associated with an option value
- Create a product-level price change rule associated with a SKU
- Create an option set-level weight change rule associated with an option value
- Test your rules

Prerequisites
1. *Build-A-Store: Product Categories*
2. *Build-A-Store: Add Products part 1*
3. *Build-A-Store: Create Product Options*
4. *Build-A-Store: Inventory Tracking & Rules*

Complete These Steps

1. **Create** a product-level image change rule associated with an option value

> It is possible to display a different image when the shopper chooses an option value, like a color, or combination of values. Here, you will display a different image when a new color is selected,

a. **Navigate** to *Products > View*
b. **Click** *edit* under the action menu for the product you edited in *Build-A-Store: Create Product Options* and *Build-A-Store: Inventory Tracking & Rules*
c. **Click** the *Options & SKUs* tab toward the top
d. **Click** the *Rules* tab on the left
e. **Click** the *Create a Rule…* button
f. **Click** the addition sign to the left of the display name for the color option
g. **Check** the checkbox for a color that should trigger the image change
h. **Check** the checkbox for *Show a different image* under *Make These Changes*
i. **Upload** the image that should display when the shopper chooses the color
j. **Click** the *Save and Close* button

2. **Create** a product-level price change rule associated with a SKU

> ℹ️ It is possible to charge a different price when the shopper chooses an option value or combination of values. Here, you will increase the product price when a shopper chooses a specific SKU.

    a. **Click** the *SKUs* tab on the left
    b. **Click** *Edit* in the action menu for the SKU that should have a greater price
    c. **Type** a new, greater, price in the *Price* field
    d. **Click** the *Save and Close* button
    e. **Click** the downward facing arrow next to the *Save* button
    f. **Click** *Save & Close*

3. **Create** an option set-level weight change rule associated with an option value

    a. **Navigate** to *Products > Product Options*
    b. **Click** the *Option Sets* tab toward the top
    c. **Click** *Edit Rules* in the action menu for the option set applied to the product you edited in the previous steps
    d. **Click** the *Create a Rule…* link
    e. **Click** the addition sign to the left of the display name for the size option
    f. **Check** the checkbox for a color that should trigger the weight change
    g. **Check** the checkbox for *Adjust its Weight* under *Make These Changes*
    h. **Type** a value in the text field to the right of *Add*
        i. Note: if it makes more sense to remove weight, you can change *Add* to *Remove*
    i. **Click** the *Save and Close* button

4. **Test** your rules

    a. **View** the product page on the storefront
    b. **Select** the color that should trigger the image change rule
        i. Observe the image change and/or preview image
    c. **Select** the SKU that should trigger the price change rule
        i. Observe the price change
    d. **Select** the size that should trigger the weight change rule
        i. If weight is displayed on the product page, observe the weight change
        ii. Weight can be displayed or hidden from the product page using the *Show Product's Weight?* setting on *Store Setup > Store Settings > Display*

In this activity, you created rules associated with options at the product level, a SKU, and options at the option set level. When would a merchant prefer to use rules at the option set level instead of at the SKU level? When would a merchant prefer to use a combination of options at the product level to create a rule instead of a SKU?

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Products Lesson 08:
Product Filtering

❏ Introduction

Product filtering enables sorting and filtering by size, color, brand and any custom field.

It allows you to deliver an Amazon-like shopping experience so shoppers can easily find products they're looking for fast.

❏ Learning Objectives

After completing this lesson, you should be able to:

- Describe Product Filtering/Faceted Search
- Identify which pricing plans include Product Filtering
- Enable and configure Product Filtering on a store
- Create filters using Options and Custom Fields

❏ Content

This lesson includes the following content:

Content
Video: Product Filtering
Lab Activity: Product Filtering

❏ Reference

This lesson may reference the following content

Reference
KB Article: Product Filtering https://support.bigcommerce.com/articles/Public/Product-Filtering-Settings/
Blueprint Documentation: Product Filtering Toolkit https://developer.bigcommerce.com/themes/blueprint/#product-filtering-toolkit
Stencil Documentation: Faceted Search Object https://stencil.bigcommerce.com/docs/faceted-search-object

Video: Product Filtering

❏ Video

Watch the *Product Filtering* video on YouTube: https://youtu.be/G94cOZuMO6E

❏ Notes

Use the area below for writing down any notes or key takeaways from the video:

Build-A-Store: Product Filtering

Duration: 10 minutes

In this lab you will...
- Enable/Disable Product Filtering
- Edit filters
- Make a product with no options show up in filtered results when a filter is selected
- Test your filters

Prerequisites
1. *Build-A-Store: Product Categories*
2. *Build-A-Store: Add Products part 1*
3. *Build-A-Store: Create Product Options*
4. *Build-A-Store: Inventory Tracking & Rules*

Complete These Steps

> ⓘ The following steps require your store to be on a plan that supports Product Filtering. If your store is still a trial, you may need to upgrade it to a Pro or Enterprise plan to complete the following steps.

1. **Enable/Disabl**e Product Filtering

   a. **Navigate** to *Products > Product Filtering*
   b. **Click** the *Enable product filtering* button
   c. **Click** the toggle switch in the upper right to disable product filtering
   d. **Click** the toggle switch again to enable product filtering again
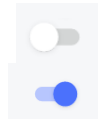
2. **Edit** filters

> ⓘ Product filtering allows shoppers to filter products by price, rating, brand, category, free shipping, in stock, and featured products by default. Additionally, product options and custom fields can be used to create more filters like color and size

   a. **Click** the green checkmark in the *Visible In Storefront?* column for a filter to hide a filter from the storefront
   b. **Click** the red X in the *Visible In Storefront?* column to display a filter on the storefront
   c. **Hide** and display filters as you see fit
       i. Note: Ensure the filter corresponding to the color option created in *Build-A-Store: Create Product Options* is enabled
   d. **Drag & drop** the filters into the order in which they should display

   e. **Rename** a filter
       i. **Click** the action button to the right of the filter that corresponds to your Size option
       ii. **Type** a new name (example: Filter by Size) into the Display Name field
   f. **Click** the *Save* button

3. **Display** a product with no options when a filter based on an option is selected

> Filters corresponding to options like size and color can be displayed on the storefront, however sometimes a product with no options should display when an option value is selected. For instance, a shirt that is only available in White should appear when the value White is selected from a filter that corresponds to a color option.
>
> This can be accomplished by creating a Custom Field on the product. The name of the Custom Field must exactly match the display name of the option that corresponds to the filter.

> Filtering by custom fields is not available on the Pro pricing plan. To complete the following steps, your store must be on an enterprise pricing plan, or be an employee/partner sandbox.

    a. **Navigate** to *Products > View Products*
    b. **Click** the name of a product with no options to edit it
        i. If you do not have a product with no options, create one now
        ii. Ensure this product lives in the same category as a product with the color option
    c. **Click** the Custom Fields tab on top
    d. In the *Custom Field #1 Name* field, **type** the display name of the color option used on another product.
        i. Note: The name must match exactly including case (i.e. "Choose a color" will not match "Choose a Color" because the matching is case sensitive)

    e. **Type** the name of a color that corresponds to a value in the color option into the *Custom Field #1 Value* text field (i.e. if "Orange" is a value in your color option, type "Orange" into the *Custom Field #1 Value* field)
    f. **Click** the *Save* button

4. **Test** your filters

    a. **View** the category page that contains both your product with the custom field and a product with options
    b. Under the filter corresponding to your color option, **select** the color that corresponds to the custom field you created in the previous steps

> At this point, both the product with the custom field and any products with the same color as an available option value should be visible on the category page. If they do not both appear, check to ensure the option display name and custom field name exactly match as well as the option value and custom field value.