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PIM Use Case Scenario

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Overview

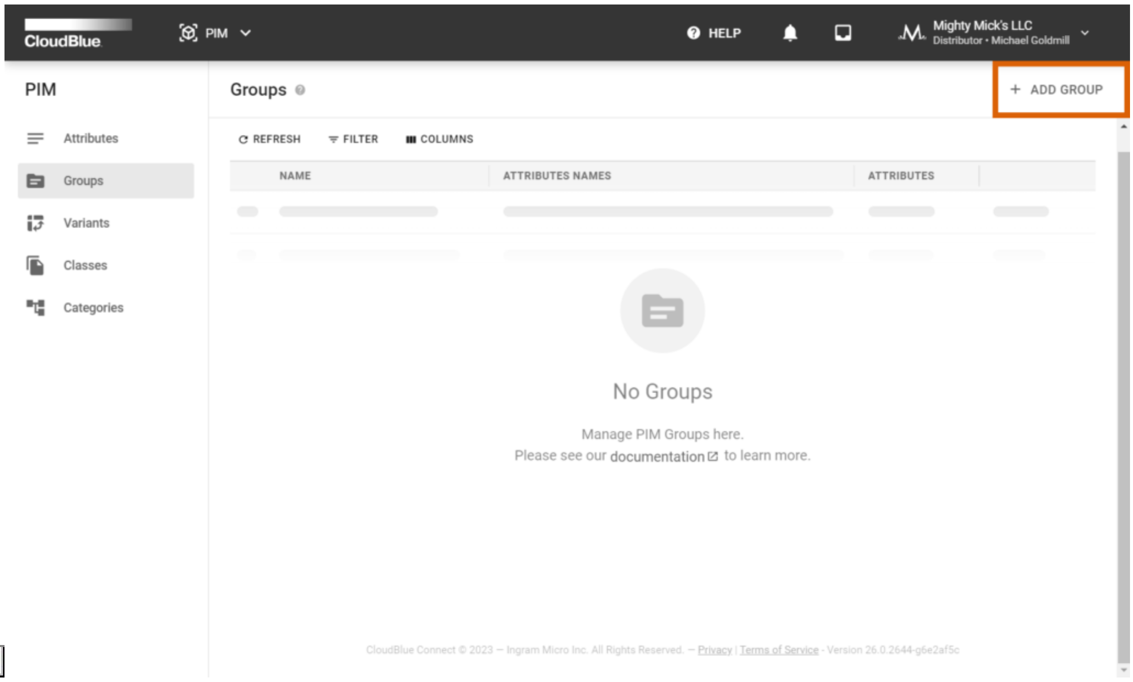
The CloudBlue Connect platform allows defining product categories, attributes, groups, classes, and variations for specifying product information that your commerce system works with. Specifically, the Product Information Management module provides comprehensive functionality to create templates for collecting technical details and other important aspects of a product.

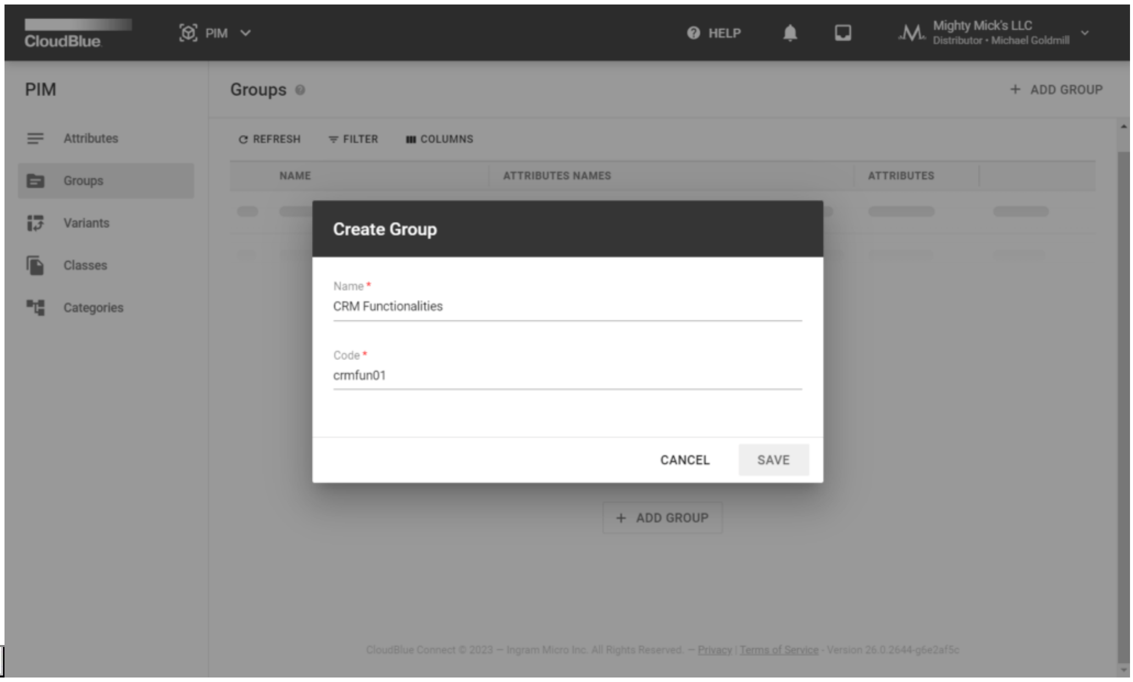
Once all templates are established, the system streamlines and facilitates product information specifications during the Product Definition flow. Therefore, Vendors can select a category and specify attributes for each product with just a few clicks.

The following provides a use case scenario and step-by-step instructions on how to define attributes, classes, groups and other templates for customer management software.

Creating Group

The PIM module operations do not require any prerequisites or established contractual relationship with a specific Vendor. However, the system includes a specific workflow for defining such templates. Start off by creating groups for your future attributes as follows:



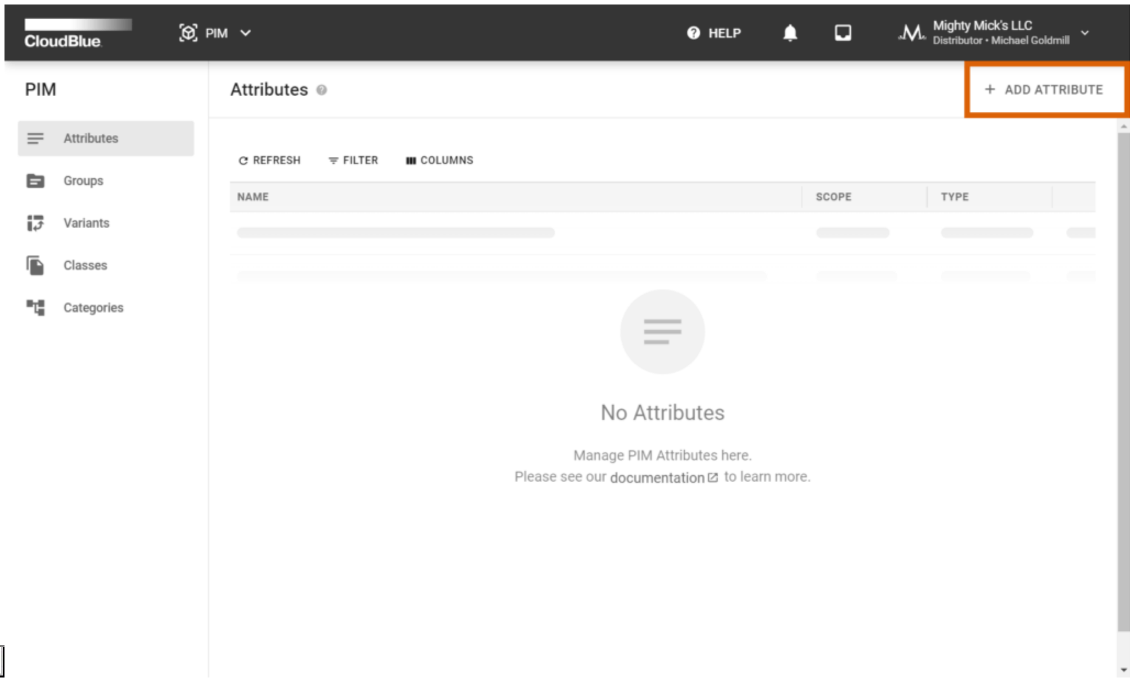


1. Navigate to the *PIM* module and switch to the **Groups** tab.
2. Define a new group by clicking on **Add Group** at the top-right corner of the screen.
3. Specify a *name* for your group and a *code* that identifies your group by using corresponding fields.

This scenario showcases a created group that is called *CRM Functionalities*. This group will be used for creating attributes of cloud-based customer management software.

Attributes Creation

Once your group is defined, the system allows creating attributes that can be associated with your provided group. Attributes allow Vendors to specify technical characteristics that are required for your commerce or other external systems. The following demonstrates how to define attributes for your created group: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PIM
HELP
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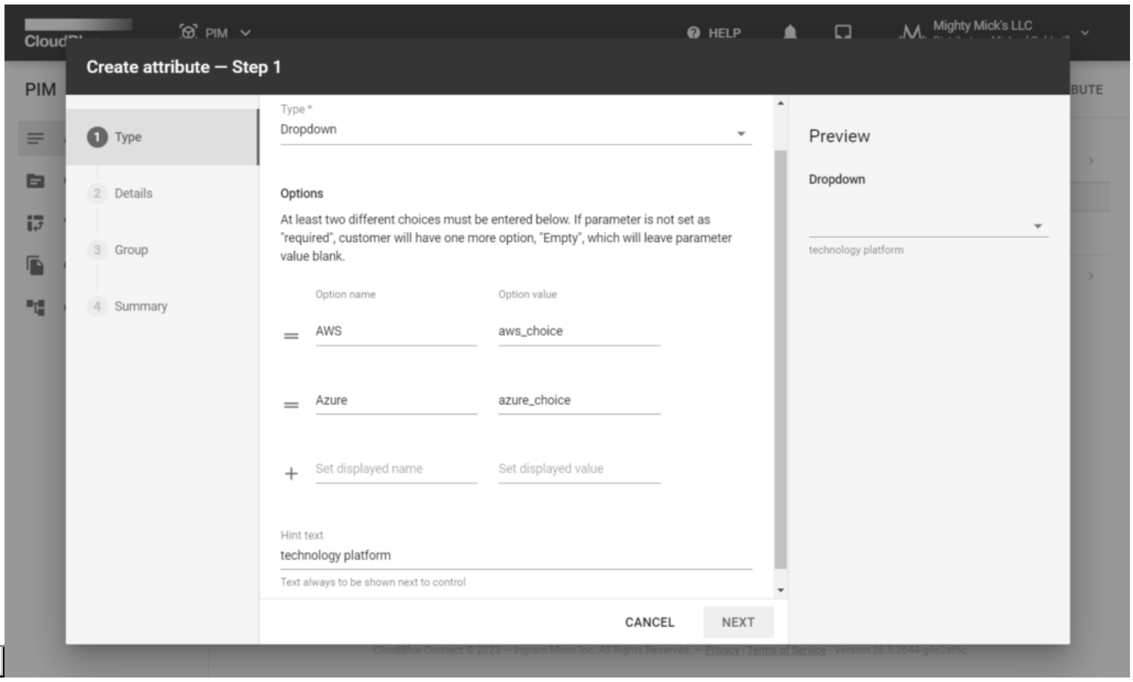
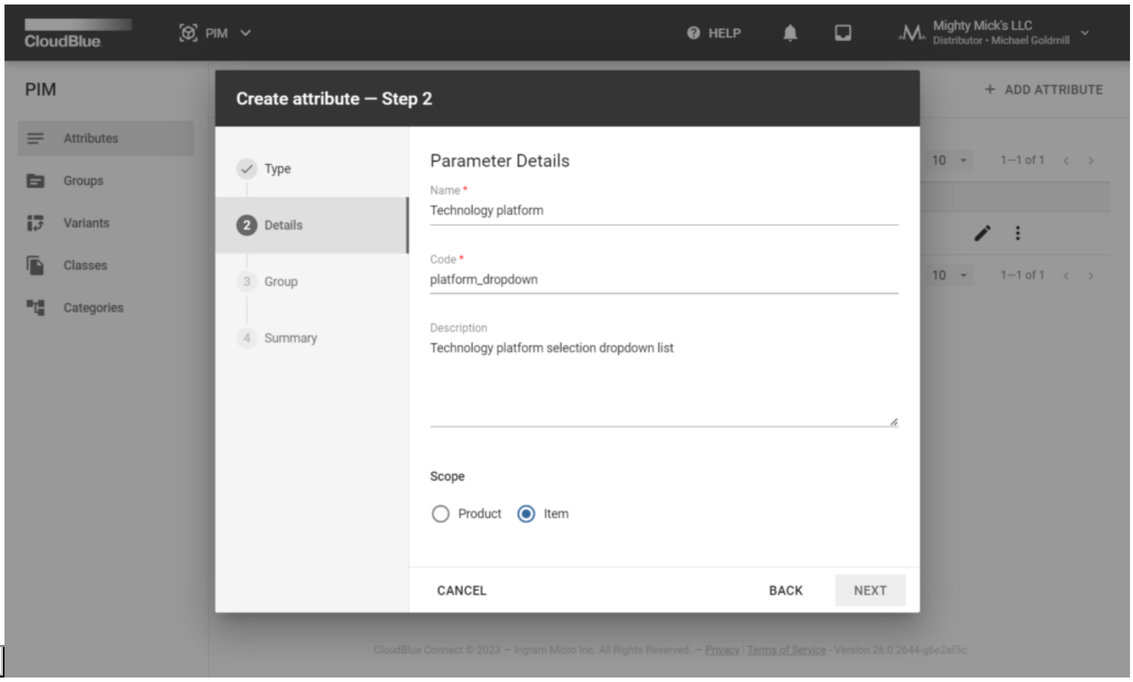
PIM
Attributes
+ ADD ATTRIBUTE
Attributes
Groups
Variants
Classes
Categories
REFRESH
FILTER
COLUMNS
NAME
SCOPE
TYPE
No Attributes
Manage PIM Attributes here.
Please see our documentation to learn more.


Create attribute — Step 1
1 Type
2 Details
3 Group
4 Summary
Type *
Dropdown
Options
At least two different choices must be entered below. If parameter is not set as "required", customer will have one more option, "Empty", which will leave parameter value blank.
Option name
Option value
AWS
aws_choice
Azure
azure_choice
Set displayed name
Set displayed value
Hint text
technology platform
Text always to be shown next to control
CANCEL
NEXT
Preview
Dropdown
technology platform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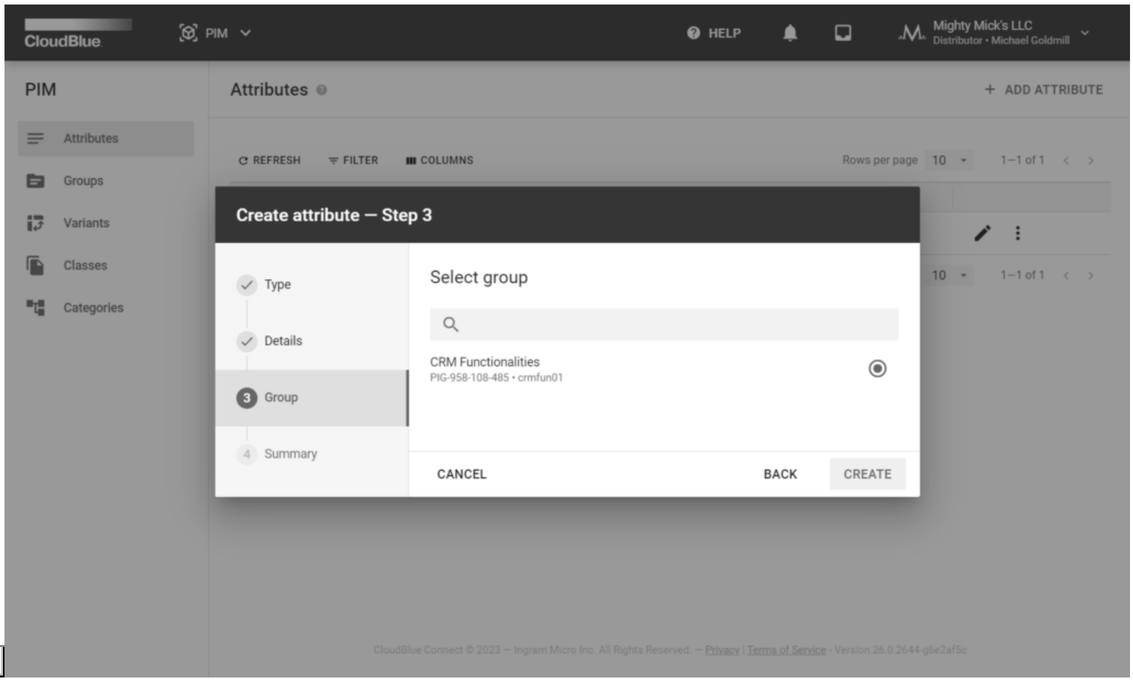
Attributes
Groups
Variants
Classes
Categories
Create attribute — Step 2
Type
Details
Group
Summary
Parameter Details
Name *
Technology platform
Code *
platform_dropdown
Description
Technology platform selection dropdown list
Scope
Product
Item
CANCEL
BACK
NEXT
ADD ATTRIBUTE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HELP
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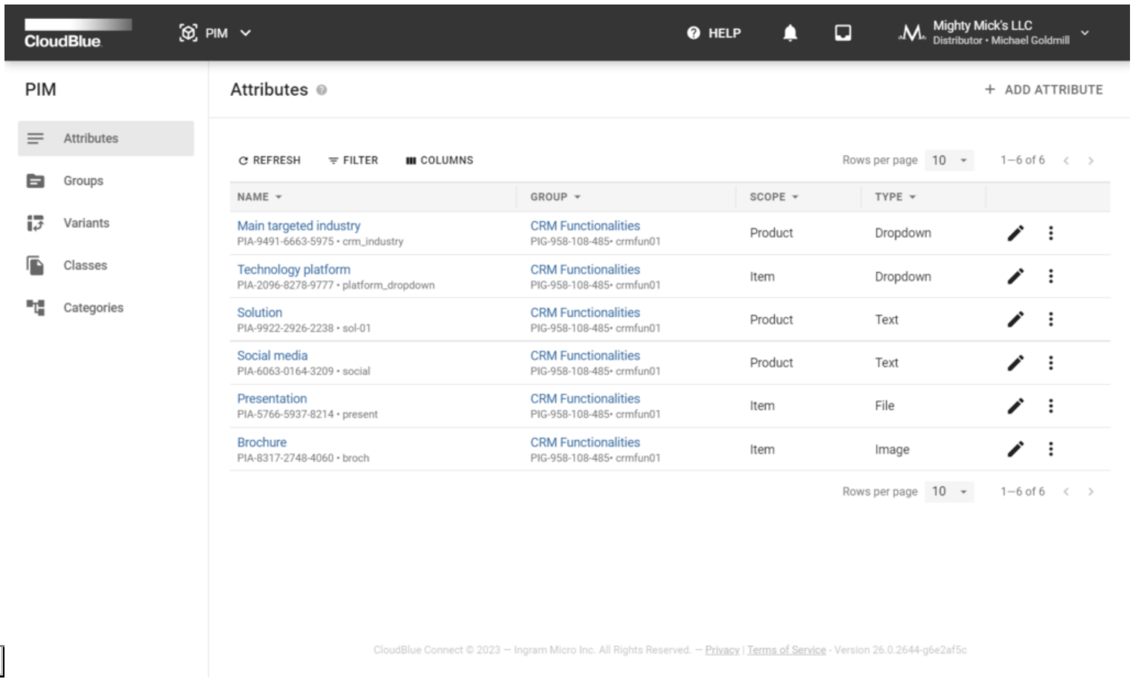
Attributes
Groups
Variants
Classes
Categories
Attributes
ADD ATTRIBUTE
REFRESH
FILTER
COLUMNS
Rows per page
Create attribute — Step 3
Type
Details
Group
Summary
Select group
CRM Functionalities
PIG-958-108-485 • crmfun01
CANCEL
BACK
CREATE



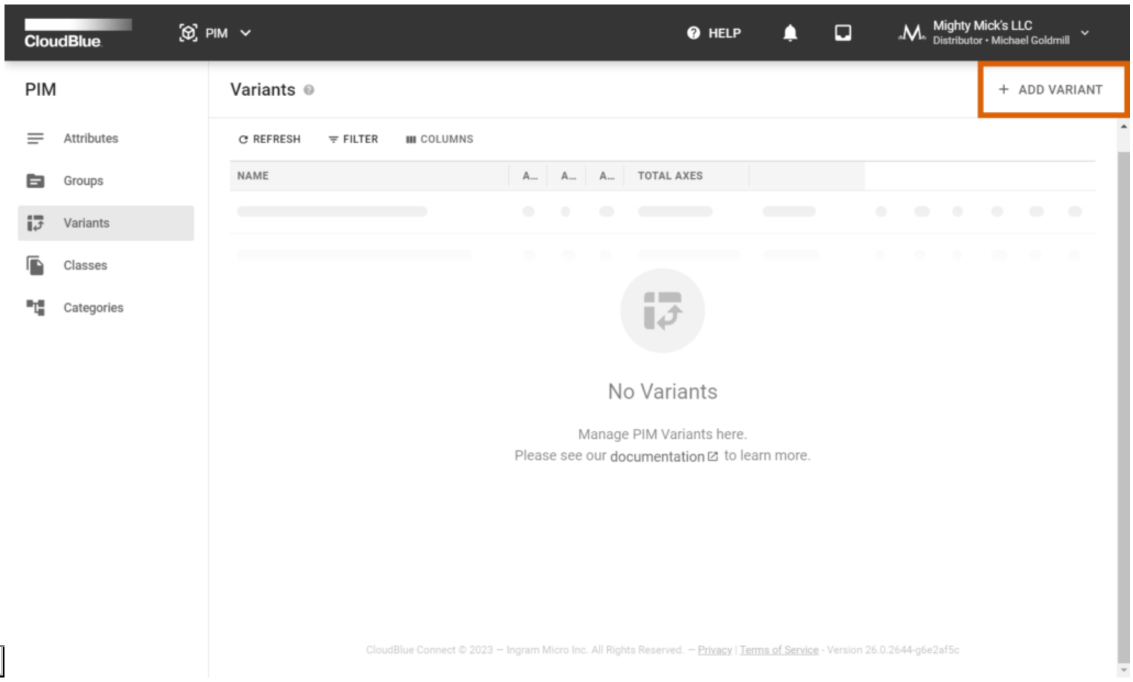
1. Switch to the **Attributes** tab and click the **Add Attribute** button.
2. Select a type for your new attribute. The following configuration varies depending on your selected type.
3. Specify your attribute details. This includes a name, a code, a description, and a scope for your attribute.
4. Select your created group. The *CRM Functionalities* group is selected in this scenario.

Thus, your attribute will be successfully created. Note that the system allows creating as many attributes as it is required for your commerce system or products. The provided demo scenario includes multiple item-scope and product-scope attributes that represent various features and functionalities of CRM solutions.

Variants Creation

In case multiple *item-scope* attributes are created, the system allows creating variants with different combinations of such attributes. Note that variant creation is an *optional* procedure, but it allows establishing structured representation of all available items and finding required items within commerce systems much quicker.

Follow the steps below to define your variants: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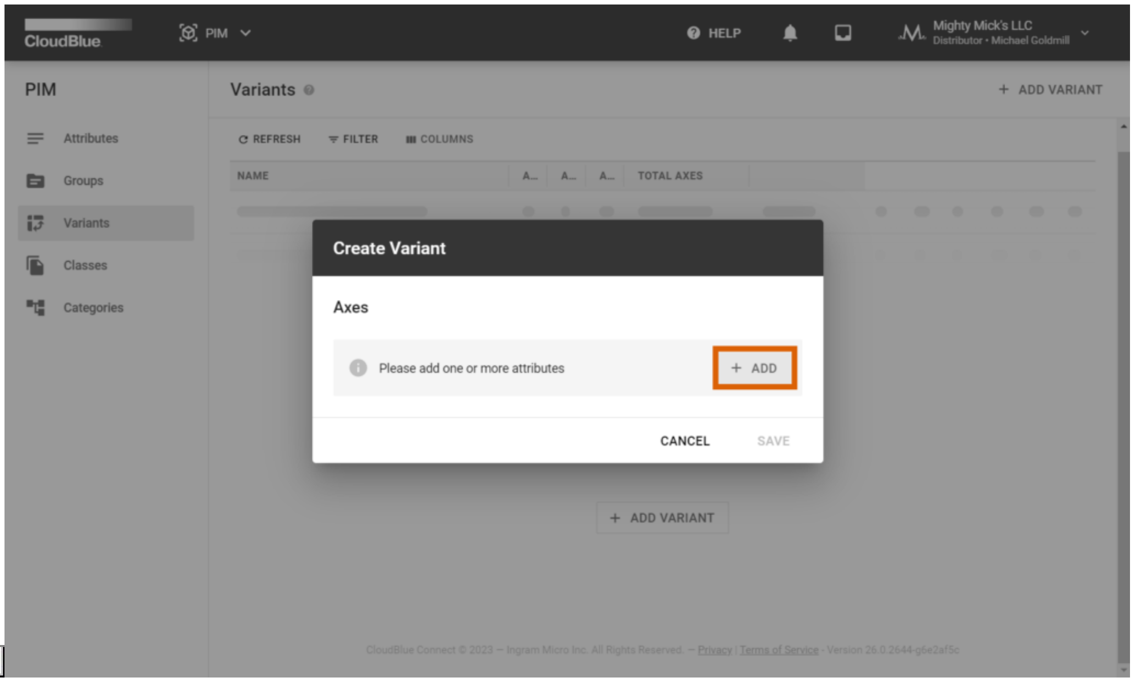
Variants
ADD VARIANT
Attributes
Groups
Variants
Classes
Categories
REFRESH
FILTER
COLUMNS
NAME
TOTAL AXES
No Variants
Manage PIM Variants here.
Please see our documentation to learn more.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HELP
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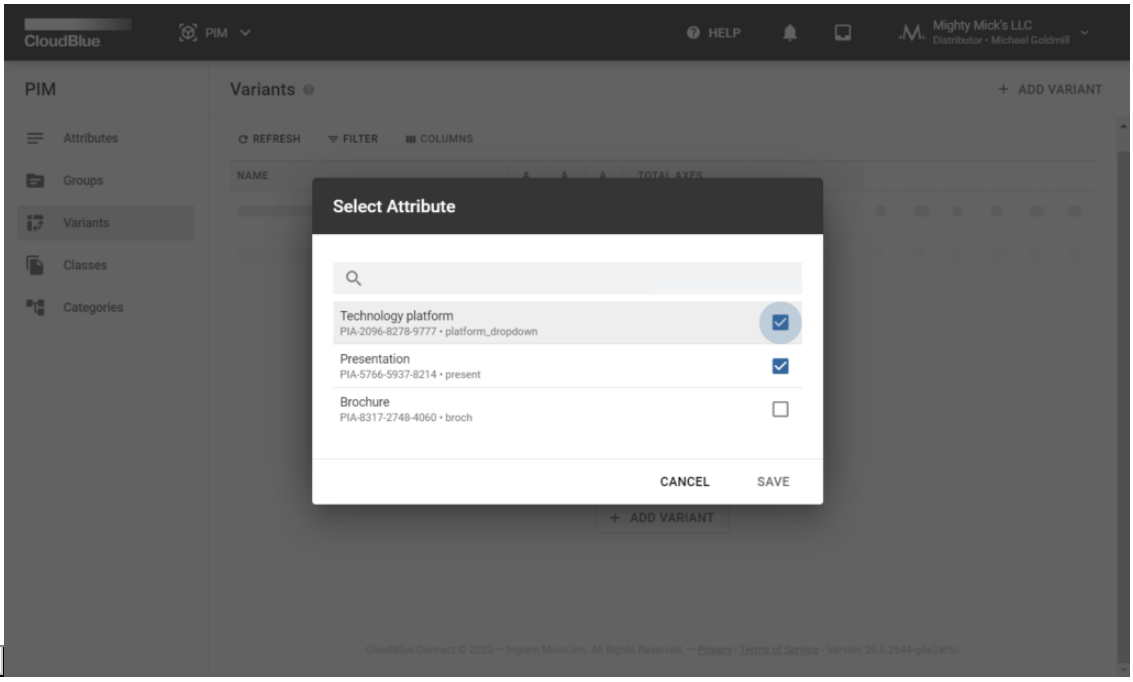
PIM
Variants
ADD VARIANT
Attributes
Groups
Variants
Classes
Categories
Create Variant
Axes
Please add one or more attributes
ADD
CANCEL
SAVE
ADD VARIANT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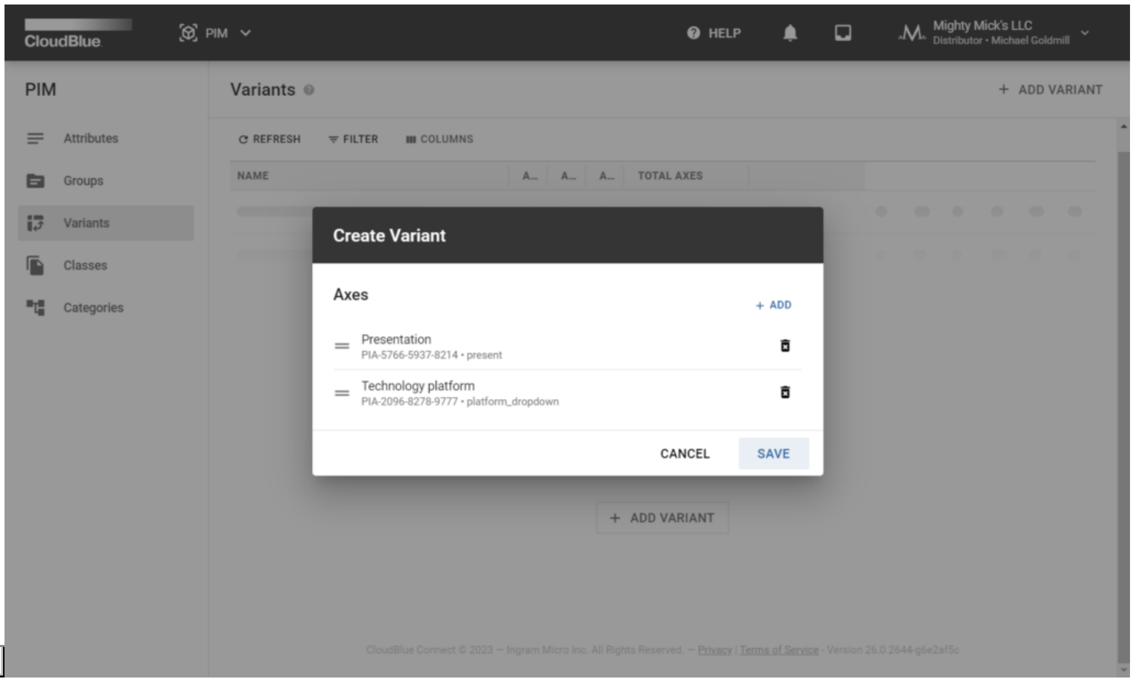
Variants
ADD VARIANT
Attributes
Groups
Variants
Classes
Categories
REFRESH
FILTER
COLUMNS
NAME
Select Attribute
Technology platform
PIA-2096-8278-9777 • platform_dropdown
Presentation
PIA-5766-5937-8214 • present
Brochure
PIA-8317-2748-4060 • broch
CANCEL
SAVE
ADD VARIANT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HELP
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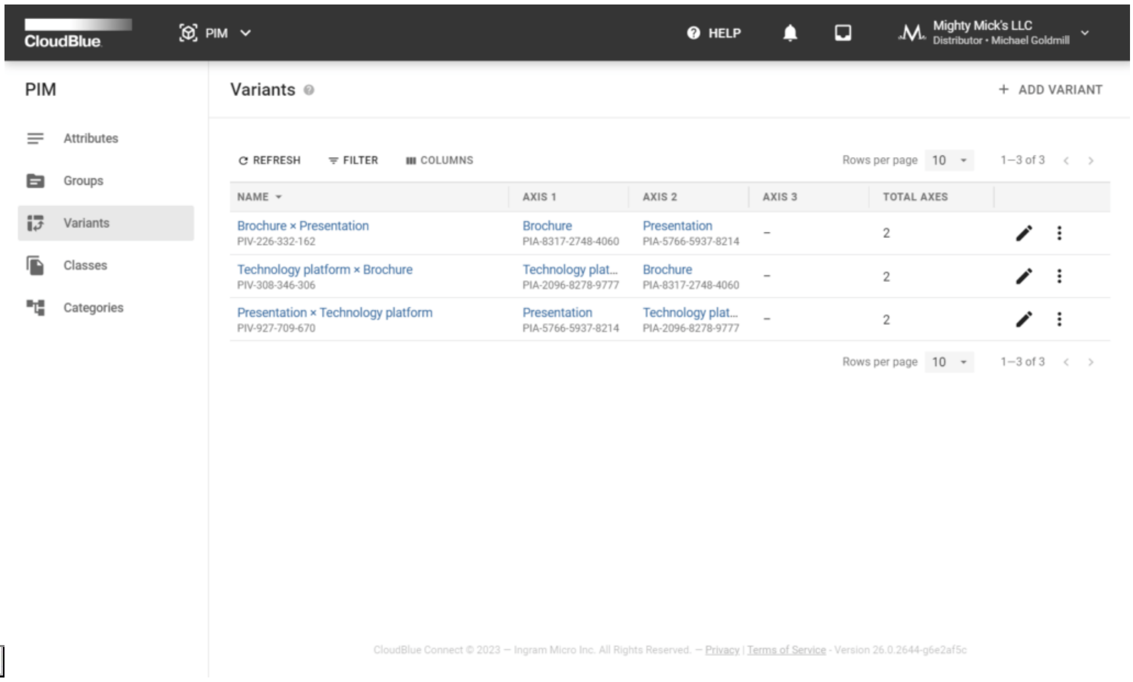
PIM
Variants
ADD VARIANT
Attributes
Groups
Variants
Classes
Categories
REFRESH
FILTER
COLUMNS
NAME
TOTAL AXES
Create Variant
Axes
ADD
Presentation
PIA-5766-5937-8214 • present
Technology platform
PIA-2096-8278-9777 • platform_dropdown
CANCEL
SAVE
ADD VARIANT

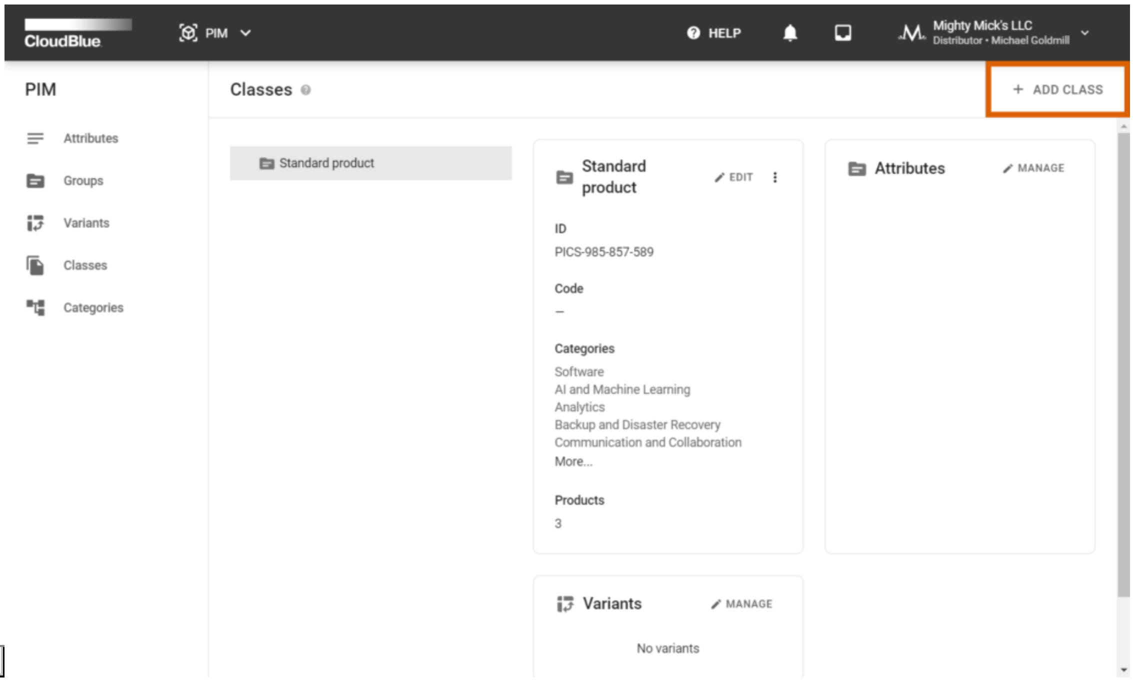


1. Navigate through the **Variants** tab and click **Add Variant**.
2. Add axes to define your required attributes combination.
3. Once all required axes are specified, complete your variant creation by clicking **Save**.
4. Repeat this process to define other variants with different axes.

The demo example incorporates multiple variants for CRM functionalities attributes. Each variant will be used for various classes and categories that will be created later in this tutorial.

Classes Creation

Classes allow organizing provided product information and establishing inheritance for your specified attributes and variants. Thus, hierarchy helps defining parent classes and consequently establish default attributes for child classes. This allows providing more structured and organized technical information for specific products. The following steps showcase how to create and configure a class: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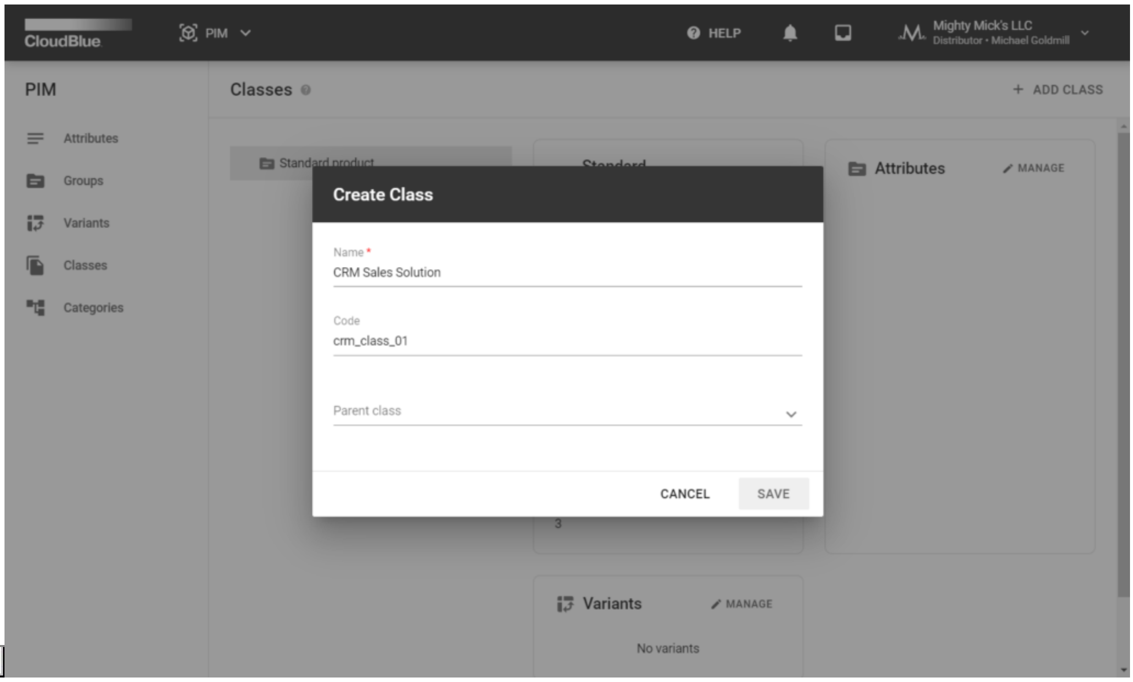
Classes
ADD CLASS
Attributes
Groups
Variants
Classes
Categories
Standard product
Standard product
EDIT
ID
PICS-985-857-589
Code
–
Categories
Software
AI and Machine Learning
Analytics
Backup and Disaster Recovery
Communication and Collaboration
More...
Products
3
Attributes
MANAGE
Variants
MANAGE
No variants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PIM
HELP
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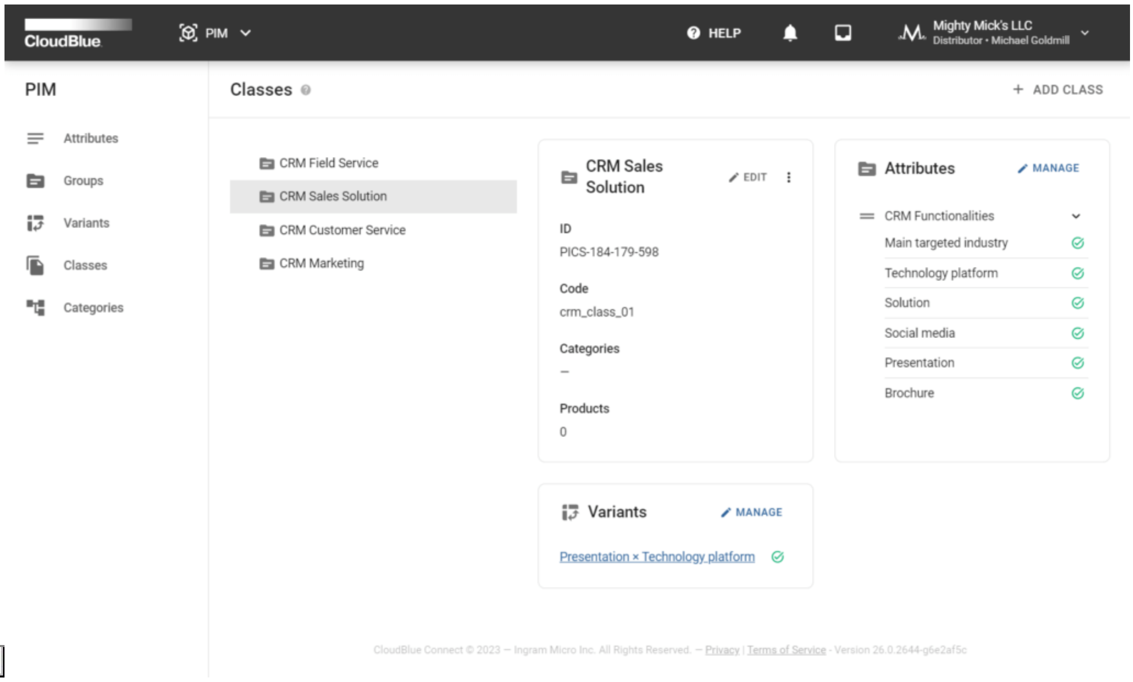
Classes
ADD CLASS
Attributes
Groups
Variants
Classes
Categories
Create Class
Name *
CRM Sales Solution
Code
crm_class_01
Parent class
CANCEL
SAVE
Attributes
MANAGE
Variants
MANAGE
No variants

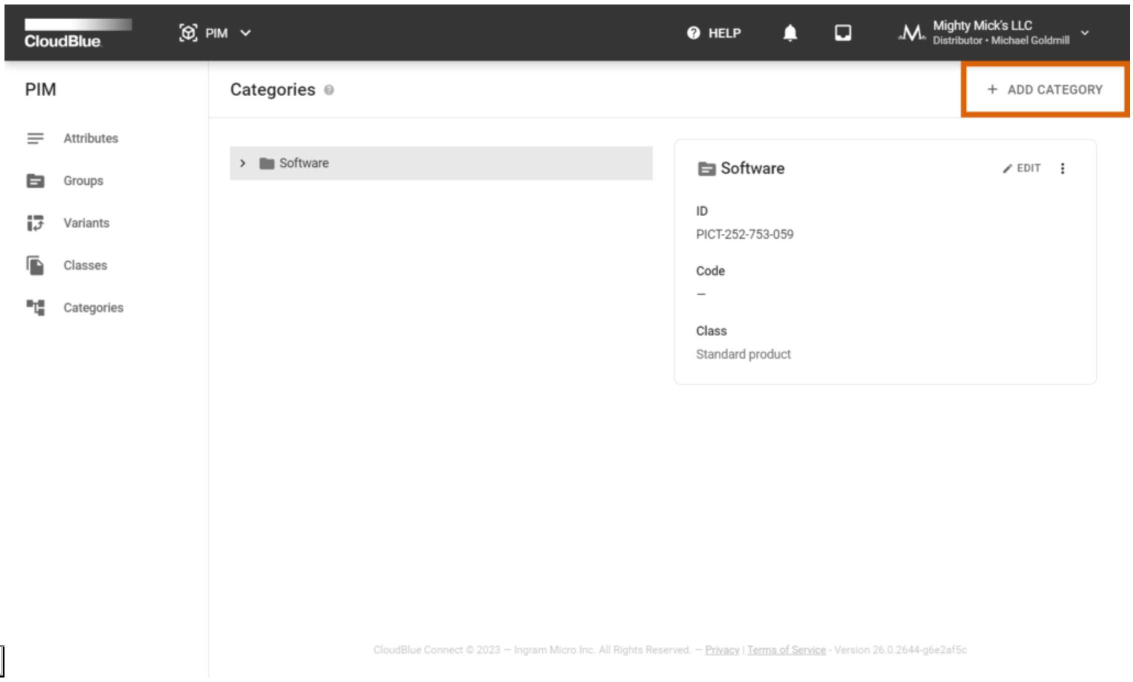


1. Proceed to the **Classes** tab and click **Add Classes**.
2. Provide a name and a code for your class. In case a parent class is required, use the corresponding option to select your previously created class.
3. Click **Save** to finalize your class creation.
4. Select attributes and variants for your class by using the corresponding **Manage** buttons from the *Classes* tab.

Therefore, your created classes and their hierarchy will be displayed within the Classes tab. Repeat these steps to define as many classes and sub-classes as needed. The demo example features multiple CRM classes with different sets of attributes and variants.

Categories Creation

Categories are marketing entities that are used to determine and organize products that offer same functionality. Consequently, categories improve product visibility and help customers quickly find required products. Categories are interconnected with classes and also feature hierarchy. Follow the steps below to define your categories: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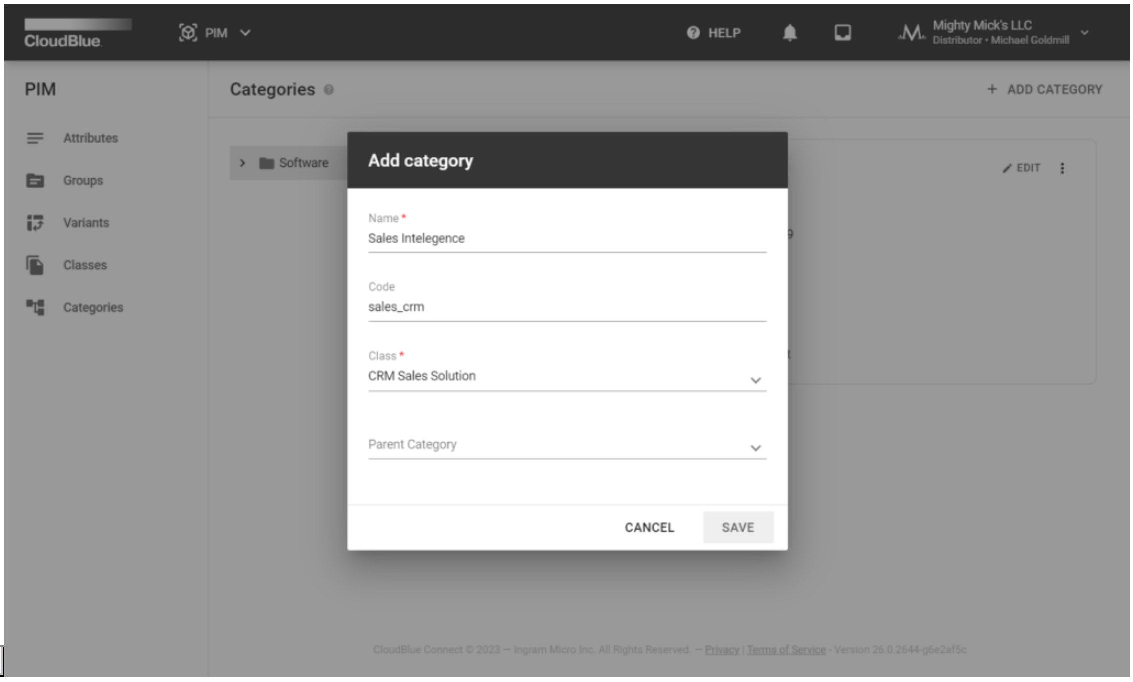
Categories
ADD CATEGORY
Attributes
Groups
Variants
Classes
Categories
Software
Software
EDIT
ID
PICT-252-753-059
Code
Class
Standard product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HELP
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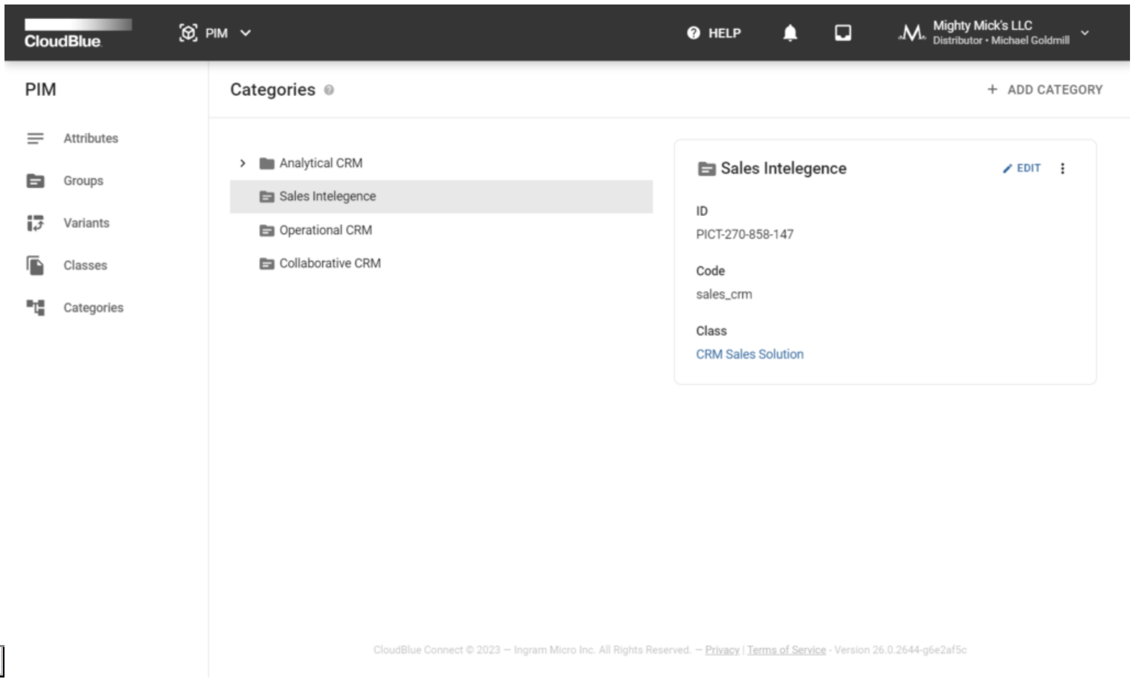
Categories
ADD CATEGORY
Attributes
Groups
Variants
Classes
Categories
Software
EDIT
Add category
Name *
Sales Intelegence
Code
sales_crm
Class *
CRM Sales Solution
Parent Category
CANCEL
SAVE



1. Switch to the **Categories** tab and click **Add Category**.
2. Specify an associated class, a name and a code for your category. Select a parent category if it is necessary by using the corresponding field.
3. Click **Save** to complete your category creation.
4. Repeat this operation to define other product categories.

As a result, all required templates within the PIM module will be successfully defined. The provided example showcases a category and multiple sub-categories for CRM software solutions. Vendors will be able to navigate through the selection of provided CRM categories and specify required attribute values.

