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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.

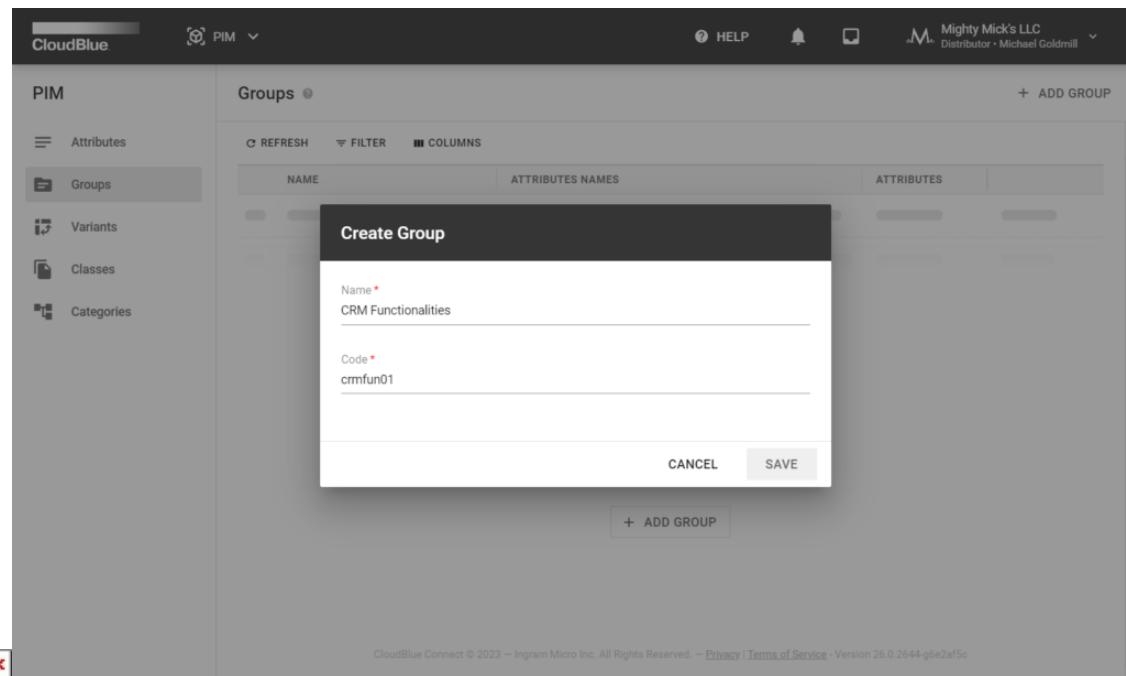
Once all templates are established, the system streamlines and facilitates product information specifications during the Product Definition flow. Therefore, Vendors can select a category and specify attributes for each product with just a few clicks.

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:

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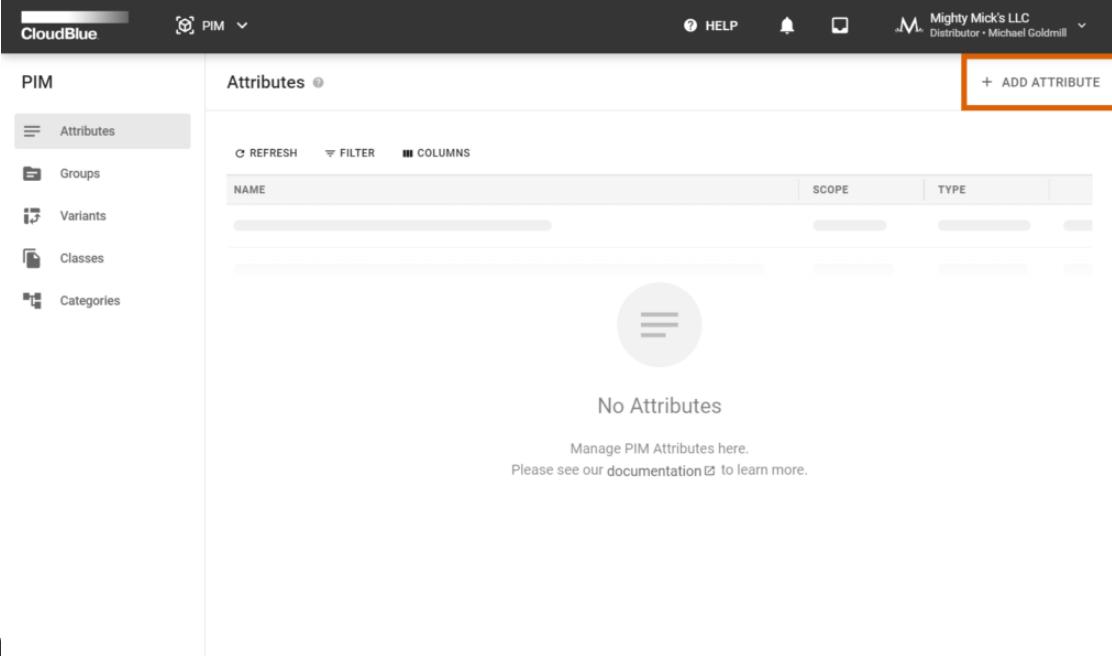


1. Navigate to the **PIM** module and switch to the **Groups** tab.
2. Define a new group by clicking on **Add Group** at the top-right corner of the screen.
3. Specify a *name* for your group and a *code* that identifies your group by using corresponding fields.

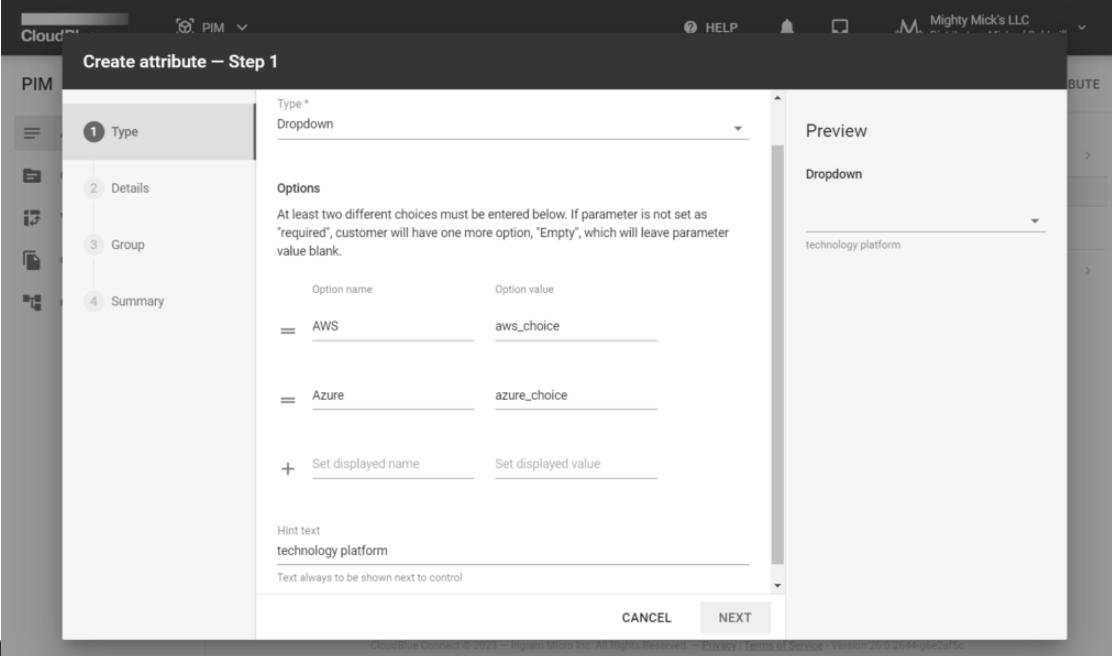
This scenario showcases a created group that is called *CRM Functionalities*. This group will be used for creating attributes of cloud-based customer management software.

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:



The screenshot shows the CloudBlue PIM Attributes page. The left sidebar has 'Attributes' selected. The main area is titled 'Attributes' with a 'REFRESH' button, a 'FILTER' button, and a 'COLUMNS' button. A table header row includes 'NAME', 'SCOPE', and 'TYPE'. Below the table, a circular icon with three horizontal lines is displayed. The text 'No Attributes' is centered, followed by the instruction 'Manage PIM Attributes here. Please see our documentation  to learn more.'



The screenshot shows the 'Create attribute – Step 1' dialog. The left sidebar has 'Type' selected. The main area shows the 'Type' dropdown set to 'Dropdown'. The 'Options' section requires at least two choices. It lists two options: 'AWS' with value 'aws_choice' and 'Azure' with value 'azure_choice'. There is a plus sign to add more options. The 'Hint text' field contains 'technology platform'. At the bottom are 'CANCEL' and 'NEXT' buttons.

 PIM

Create attribute – Step 2

Type
Name: **Technology platform**
Code: **platform_dropdown**
Description: **Technology platform selection dropdown list**

Details
Group
Summary

Parameter Details

Scope
 Product Item

CANCEL **BACK** **NEXT**

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 PIM

Attributes   

Create attribute – Step 3

Type
Details
Group
Summary

Select group

CRM Functionalities
PIG-958-108-485 • crmfunk01

CANCEL **BACK** **CREATE**

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The screenshot shows the CloudBlue PIM Attributes page. The left sidebar has tabs for PIM, Attributes (selected), Groups, Variants, Classes, and Categories. The main area is titled 'Attributes' with a sub-section 'CRM Functionalities'. It shows a table with columns: NAME, GROUP, SCOPE, and TYPE. The table contains six rows of data:

NAME	GROUP	SCOPE	TYPE
Main targeted industry PIA-9491-6663-5975 • crm_industry	CRM Functionalities PIG-958-108-485- crmfunk01	Product	Dropdown
Technology platform PIA-2096-8278-9777 • platform_dropdown	CRM Functionalities PIG-958-108-485- crmfunk01	Item	Dropdown
Solution PIA-9922-2926-2238 • sol-01	CRM Functionalities PIG-958-108-485- crmfunk01	Product	Text
Social media PIA-6063-0164-3209 • social	CRM Functionalities PIG-958-108-485- crmfunk01	Product	Text
Presentation PIA-5766-5937-8214 • present	CRM Functionalities PIG-958-108-485- crmfunk01	Item	File
Brochure PIA-8317-2748-4060 • broch	CRM Functionalities PIG-958-108-485- crmfunk01	Item	Image

At the bottom, there are buttons for 'Rows per page' (10), '1-6 of 6', and navigation arrows.



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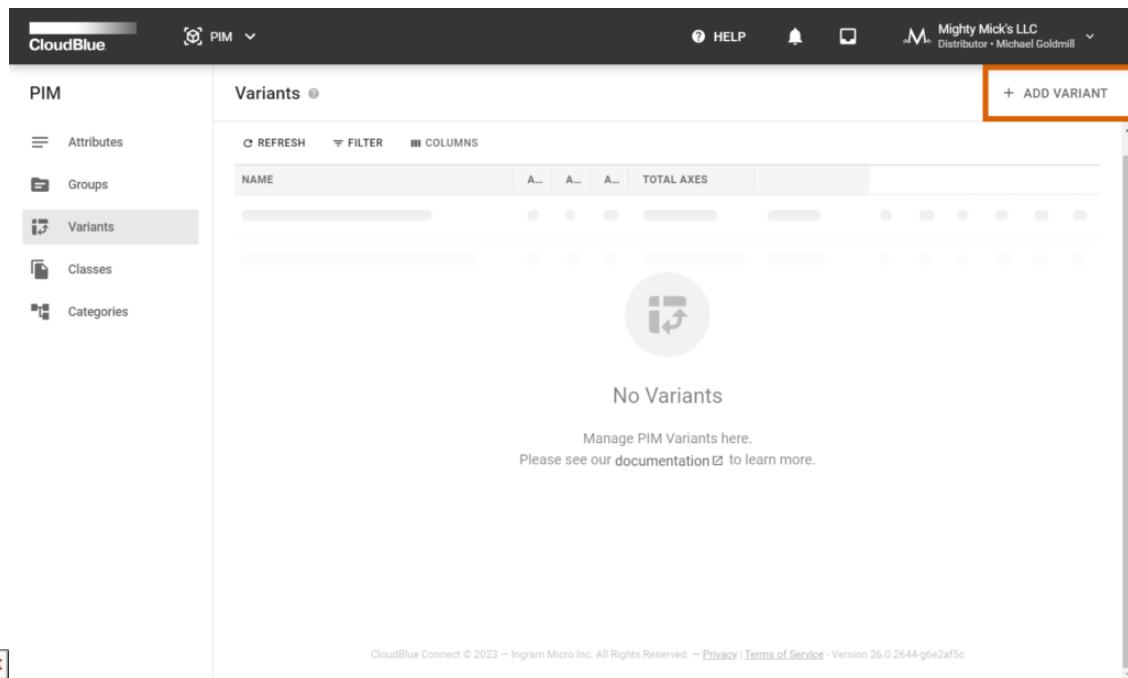
1. Switch to the **Attributes** tab and click the **Add Attribute** button.
2. Select a type for your new attribute. The following configuration varies depending on your selected type.
3. Specify your attribute details. This includes a name, a code, a description, and a scope for your attribute.
4. Select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

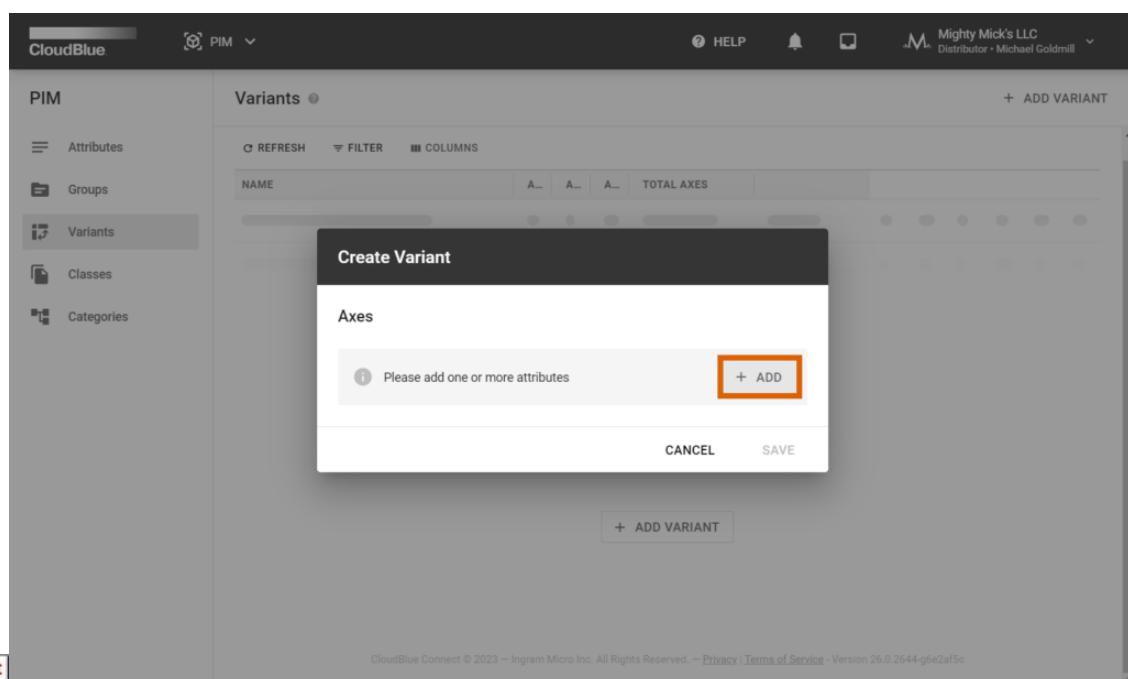
Variants Creation

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:

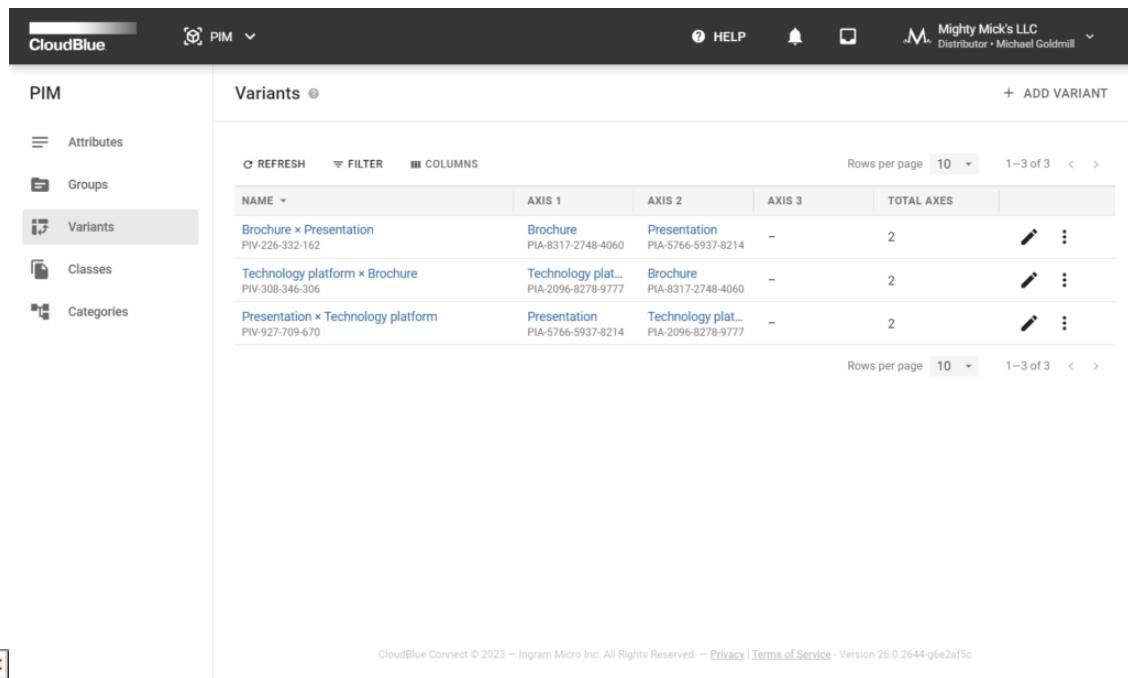


The screenshot shows the CloudBlue PIM interface. The left sidebar has 'Variants' selected. The main area is titled 'Variants' with a 'No Variants' message. A 'Create Variant' button is highlighted with a red box. The bottom of the page includes a footer with the CloudBlue Connect copyright information.



The screenshot shows the 'Create Variant' dialog box. It has a 'Create Variant' header, a 'Axes' section with a note 'Please add one or more attributes', and 'ADD' and 'CANCEL' buttons. The 'ADD' button is highlighted with a red box. The background shows the PIM interface with 'Variants' selected in the sidebar.

A screenshot of the CloudBlue PIM application. The left sidebar shows 'PIM' with 'Attributes', 'Groups', 'Variants' (selected), 'Classes', and 'Categories'. The main area is titled 'Variants' with a 'REFRESH' button, a 'FILTER' button, and a 'COLUMNS' button. A modal window titled 'Select Attribute' is open, showing a search bar and a list of three attributes: 'Technology platform' (PIA-2096-8278-9777 - platform_dropdown), 'Presentation' (PIA-5766-5937-8214 - present), and 'Brochure' (PIA-8317-2748-4060 - broch). The 'Technology platform' and 'Presentation' checkboxes are checked, while 'Brochure' is not checked. At the bottom of the modal are 'CANCEL' and 'SAVE' buttons. The background shows a table with columns labeled 'NAME', 'A...', 'A...', 'A...', and 'TOTAL AXES'. The bottom of the screen displays the footer: 'CloudBlue Connect © 2023 — Ingram Micro Inc. All Rights Reserved. — [Privacy](#) | [Terms of Service](#) - Version 26.0.2644-gf6e2af5c'.A screenshot of the CloudBlue PIM application. The left sidebar shows 'PIM' with 'Attributes', 'Groups', 'Variants' (selected), 'Classes', and 'Categories'. The main area is titled 'Variants' with a 'REFRESH' button, a 'FILTER' button, and a 'COLUMNS' button. A modal window titled 'Create Variant' is open, showing a section for 'Axes' with two items: 'Presentation' (PIA-5766-5937-8214 - present) and 'Technology platform' (PIA-2096-8278-9777 - platform_dropdown). At the bottom of the modal are 'CANCEL' and 'SAVE' buttons, and a '+ ADD' button for axes. The background shows a table with columns labeled 'NAME', 'A...', 'A...', 'A...', and 'TOTAL AXES'. The bottom of the screen displays the footer: 'CloudBlue Connect © 2023 — Ingram Micro Inc. All Rights Reserved. — [Privacy](#) | [Terms of Service](#) - Version 26.0.2644-gf6e2af5c'.



CloudBlue PIM

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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:



CloudBlue PIM

Mighty Mick's LLC Distributor • Michael Goldmill

HELP 🔍 CLASS

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

+ ADD CLASS

CloudBlue PIM

Mighty Mick's LLC Distributor • Michael Goldmill

HELP 🔍 CLASS

Standard

Create Class

Name: CRM Sales Solution

Code: crm_class_01

Parent class: —

Attributes MANAGE

Variants MANAGE

No variants

CANCEL SAVE

+ ADD CLASS

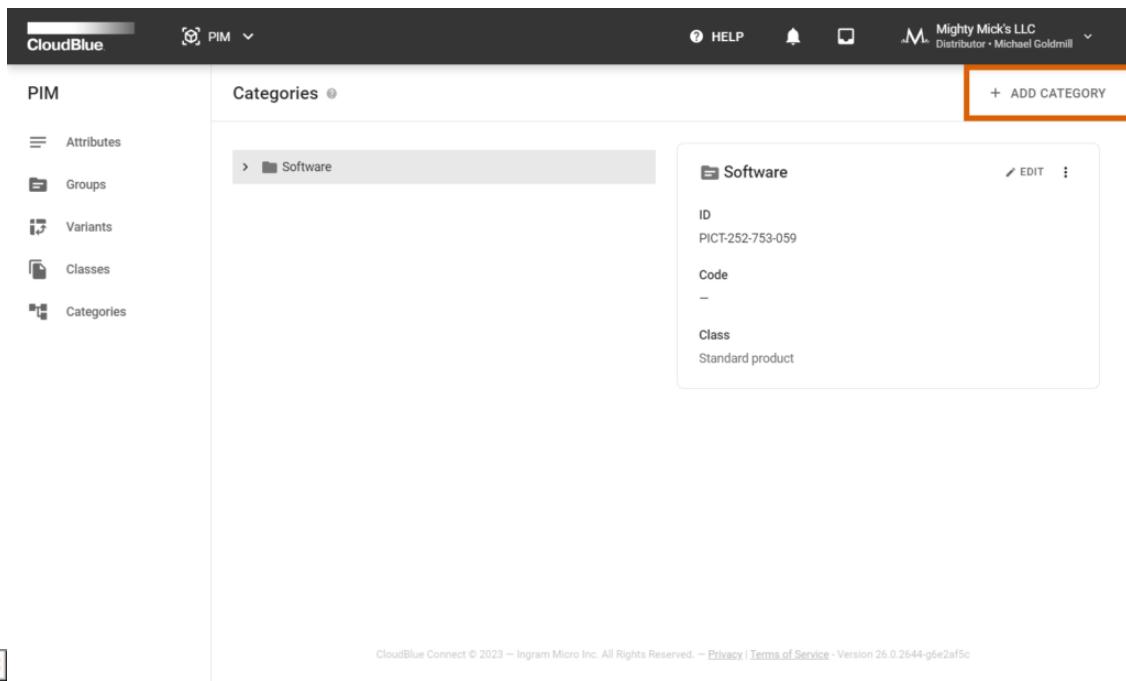


1. Proceed to the **Classes** tab and click **Add Classes**.
2. Provide a name and a code for your class. In case a parent class is required, use the corresponding option to select your previously created class.
3. Click **Save** to finalize your class creation.
4. Select attributes and variants for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



CloudBlue PIM Categories

Software

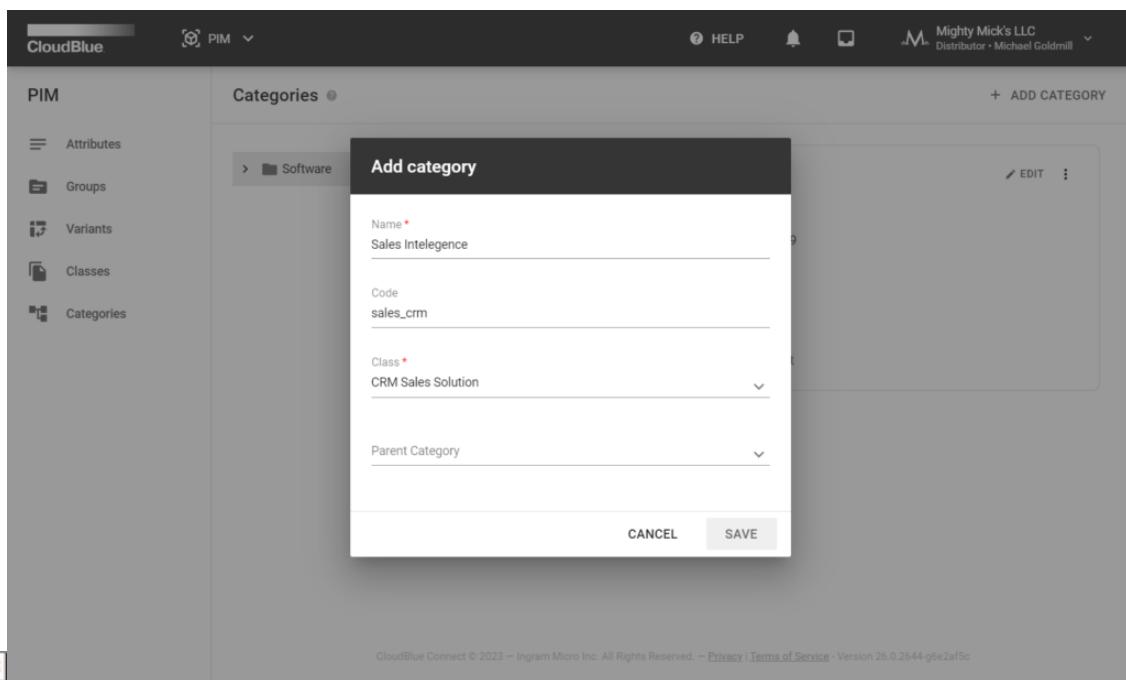
Software

ID: PICT-252-753-059

Code: —

Class: Standard product

+ ADD CATEGORY



CloudBlue PIM Categories

Add category

Name: Sales Intelegence

Code: sales_crm

Class: CRM Sales Solution

Parent Category: (dropdown menu)

CANCEL SAVE



The screenshot shows the CloudBlue PIM interface. The left sidebar has a 'Categories' tab selected. The main area shows a tree structure with 'Analytical CRM' as the parent, and 'Sales Intelegence' and 'Operational CRM' as children. 'Sales Intelegence' is selected. A detailed view on the right shows the following data for the selected category:

Sales Intelegence	
ID	PICT-270-858-147
Code	sales_crm
Class	CRM Sales Solution



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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.