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PIM Use Case Scenario

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Overview

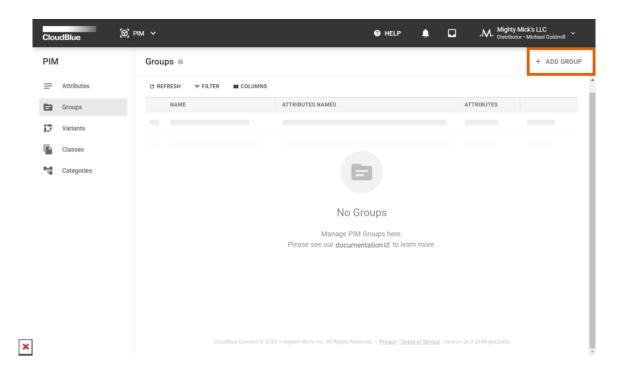
The CloudBlue Connect platform allows defining product categories, attributes, groups, classes, and variations for specifying product information that your commerce system works with. Specifically, the Product Information Management module provides comprehensive functionality to create templates for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



	Cloud	Blue.	м У			Ø HELP	۴	Mighty Mick's LLC Distributor • Michael Goldmill
	PIM		Groups @					+ ADD GROUP
	= /	Attributes	C REFRESH	⇒ FILTER III COLUMNS				
		Groups	NAME		ATTRIBUTES NAMES			ATTRIBUTES
		Variants Classes Categories		Create Group Name* CRM Functionalities Code* crmfun01	CA + ADD Gi		AVE	
×								

- 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:

PIM	Attributes @			+ ADD ATTRIBUTE
Attributes	C REFRESH = FILTER ■ COLUMNS			
Groups	NAME		SCOPE TY	PE
Variants				
Classes				
■T <mark>a</mark> Categories		=		
		No Attributes		
	P	Manage PIM Attributes here. lease see our documentation 🖾 to learn mo	pre.	

	Type *
1 Туре	Dropdown Preview
2 Details	Options Dropdown
3 Group	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.
4 Summary	Option name Option value
	= AWS aws_choice
	Azure azure_choice
	+ Set displayed name Set displayed value
	Hint text technology platform
	technology platform

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CloudBlue.	(9) PIM ~		🛛 HELP 🗯	L 🗖	Mighty Mick's LLC Victual Goldmill
PIM	Create attribute - S	Step 2			+ ADD ATTRIBUTE
 Attributes Groups Variants Classes Categories 	Type Details Group Group Summary	Parameter Details Name* Technology platform Code* platform_dropdown Description Technology platform selection dropdo Scope Product () tem	wn list		10 • 1-1 of 1 < > 10 • 1-1 of 1 < > 10 • 1-1 of 1 < >
		CANCEL	BAC	K NE	кт
	Ck	udBlue Connect © 2023 — Ingram Micro Inc. All Right	s Reserved. – <u>Privacy Terms of :</u>	Service - Version	26.0.2644-g6e2af5c

PIM	Attributes ©		_		+ ADD ATTRIBUTE
Attributes Groups	C REFRESH = FILTER	III COLUMNS		Rows per page	• 10 • 1−1 of 1 < >
🗘 Variants	Create attribute –	Step 3			1:
Classes	🗸 Туре	Select group			10 → 1−1 of 1 < >
• •	✓ Details	Q CRM Functionalities PIG-958-108-485 • crmfun01		۲	
	3 Group				
	4 Summary	CANCEL	BACK	CREATE	

[

PIM	Attributes				+ ADD ATTR
Attributes	C REFRESH ≂ FILTER III COLUMNS			Rows per page 10 👻	1-6 of 6
Groups	NAME -	GROUP -	SCOPE *	TYPE 👻	
↓ Variants	Main targeted industry PIA-9491-6663-5975 • crm_industry	CRM Functionalities PIG-958-108-485• crmfun01	Product	Dropdown	× :
Classes	Technology platform PIA-2096-8278-9777 • platform_dropdown	CRM Functionalities PIG-958-108-485• crmfun01	Item	Dropdown	× :
Categories	Solution PIA-9922-2926-2238 • sol-01	CRM Functionalities PIG-958-108-485• crmfun01	Product	Text	× :
	Social media PIA-6063-0164-3209 • social	CRM Functionalities PIG-958-108-485• crmfun01	Product	Text	× :
	Presentation PIA-5766-5937-8214 • present	CRM Functionalities PIG-958-108-485+ crmfun01	Item	File	× :
	Brochure PIA-8317-2748-4060 • broch	CRM Functionalities PIG-958-108-485• crmfun01	Item	Image	× :
				Rows per page 10 -	1-6 of 6

- 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.

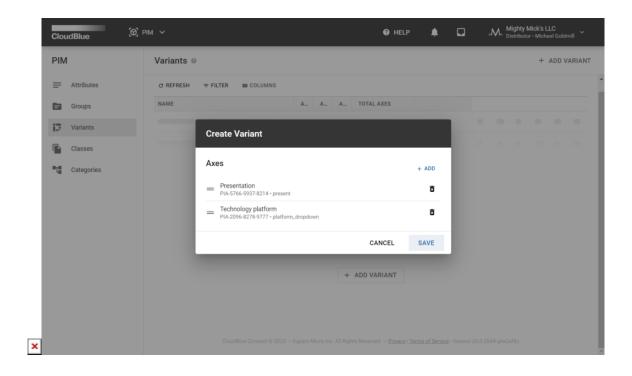
Follow the steps below to define your variants:

PIM	Variants	+ ADD VAF
Attributes	C REFRESH = FILTER III COLUM	NS T
Groups	NAME	A., A., A., TOTAL AXES
Variants		
Classes		
∎t <mark>∎</mark> Categories		
		No Variants
		Manage PIM Variants here. Please see our documentation ⊠ to learn more.

PIM	Variants @					+ /	ADD V/	ARIA
Attributes	C REFRESH	₹ FILTER III COLUMNS						
Groups	NAME	A A A	TOTAL AXES					
J Variants	_		_	_				
Classes		Create Variant						
Categories		Axes						
		Please add one or more attributes	+ A	DD				
			CANCEL	SAVE				
		·	ADD VARIANT					

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CloudBlue						
PIM	Variants (+ ADD VARIANT
Attributes	C REFRESH	₹ FILTER III COLUMNS				
Groups	NAME	Select Attribute				
Classes		Q			1	
Categories		Technology platform PIA-2096-8278-9777 • platform_dropdown			ш	
		Presentation PIA-5766-5937-8214 • present		\checkmark		
		Brochure PIA-8317-2748-4060 • broch			U	
			CANCEL	SAVE		
			+ ADD VARIANT			



						+ ADD	VAR
Attributes	C REFRESH ≂ FILTER MI COLUMNS				Rows per page 10 -	1-3 of 3	<
Groups	NAME -	AXIS 1	AXIS 2	AXIS 3	TOTAL AXES		
Variants	Brochure × Presentation	Brochure PIA-8317-2748-4060	Presentation	-	2	/	:
Classes	Technology platform × Brochure	Technology plat	Brochure	-	2	/	:
Categories	Presentation × Technology platform	Presentation	Technology plat	-	2	1	:
					Rows per page 10 👻	1-3 of 3	<
	Groups Variants Classes	C REFRESH FILTER III COLUMNS NAME ~ Variants Brochure × Presentation PIV-226-332-162 Classes Technology platform × Brochure PIV-308-346-306	C REFRESH FILTER COLUMNS NAME + AXIS 1 Brochure × Presentation PIV-226-332-162 Brochure PIX-8317-2748-4060 Classes Technology platform × Brochure PIV-308-346-306 Ptechnology plat PIX-2398-8278-9777 Categories Presentation × Technology platform Presentation	Groups C REFRESH T FILTER INI COLUMNS Variants NAME * AXIS 1 AXIS 2 Brochure × Presentation PIV-226-332-162 Brochure PIV-308-346-306 Presentation PIA-5766-5937-8214 Classes Technology platform × Brochure PIV-308-346-306 Technology plat_ PIA-576-68278-9777 Brochure PIX-8317-2748-4060 Categories Presentation × Technology platform Presentation Technology plat_	Groups C REFRESH FILTER III COLUMNS Variants NAME * AXIS 1 AXIS 2 AXIS 3 Brochure × Presentation PIV-226-332-162 Brochure PIV-236-346-5937-6214 - - Classes Technology platform × Brochure PIV-308-346-506 Presentation PIA-3076-8278-9777 Brochure PIA-3076-8278-9777 Brochure PIA-3076-8278-9777 - Categories Presentation × Technology platform Presentation Technology plat _	Groups C REFRESH FILTER III COLUMNS Rows per page D • NAME • AXIS 1 AXIS 2 AXIS 3 TOTAL AXES Variants Brochure × Presentation PrV-226-332-162 Brochure PLAS371/2748-4000 Presentation PLAS376-5937-8214 - 2 Classes Technology platform × Brochure PVV-308-346-306 Technology platform PLAS371-2748-4000 Presentation PLAS371-2748-4000 - 2 Classes Technology platform Presentation PLAS376-5937-8214 Technology plat. PLAS376-5937-8214 - 2	Groups C REFRESH FILTER III COLUMNS AXIS 1 AXIS 2 AXIS 3 TOTAL AXES I -3 of 3 Variants Brochure × Presentation PIV-226-332.162 Brochure PIV-326-332.162 Brochure PIA-8376-2784-000 Presentation PIA-8376-2784-000 Presentation PIA-8376-2784-000 - 2 Classes Technology platform × Brochure PIV-308-346-306 Technology platform PIA-8376-6937-8214 Brochure PIA-8376-6937-8214 - 2 Classes Presentation × Technology platform PIV-927-709-670 Presentation PIA-8376-6937-8214 Technology platform PIA-8376-6937-8214 - 2

- 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.

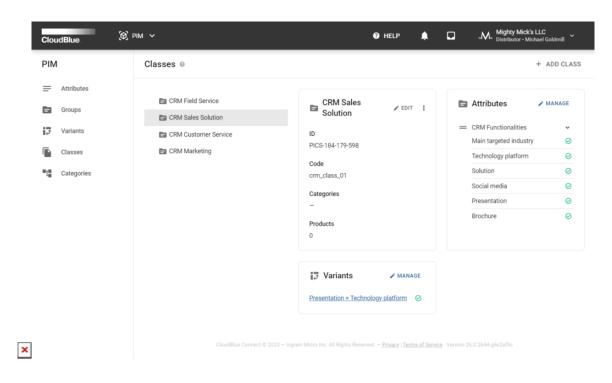
The demo example incorporates multiple variants for CRM functionalities attributes. Each variant will be used for various classes and categories that will be created later in this tutorial.

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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PIM	Classes Ø			+ ADD CLASS
 Attributes Groups Variants Classes Categories 	Standard product	Standard ► EDIT : ID PICS-985-857-589 . Code . . T . . Categories . . Software . . Analytics Backup and Disaster Recovery . Backup and Disaster Recovery . . Products . . 3 . .	Attributes	MANAGE
		₩ Variants MANAGE No variants		

CloudBlue	(б) РІМ ~	🛿 HELP 🌲	Mighty Mick's LLC Distributor • Michael Goldmill
PIM	Classes @		+ ADD CLASS
Attributes Groups Variants	Standard province Create Class	Standard	Attributes Attributes
Classes	CRM Sales Solution Code crm_class_01 Parent class	~	
		CANCEL SAVE	
×		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:

CloudBlue.	(8) PIM ~	I HELP	Mighty Mick's LLC Visitributor • Michael Goldmill
PIM	Categories		+ ADD CATEGORY
 Attributes Groups Variants Classes Categories 	> En Software	ID PICT-252-753-054 Code - Class Standard product	59
T Categories		Class	7
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CloudBlue	Ø PIM ∨		0	HELP 🧍)	Mighty Mick's LLC Distributor • Michael Goldmill
PIM	Categories					+ ADD CATEGOR
Attributes	> 🖿 Software	Add category	_			≠ EDIT :
Groups		Name *				
Classes		Sales Intelegence				
Categories		sales_crm				
		Class * CRM Sales Solution		~		
		Parent Category		~		
			CANCEL	SAVE		

CloudBlue.	PIM V	🛛 HELP 🌲 🗔 "M.	Mighty Mick's LLC [•] Distributor • Michael Goldmill
PIM	Categories		+ ADD CATEGO
 Attributes Groups Variants Classes Categories 	Analytical CRM Sales Intelegence Operational CRM Collaborative CRM	E Sales Intelegence ID PICT-270-858-147 Code sales_crm Class CRM Sales Solution	✓ EDIT :
	CloudBlue Connect © 2023 — Ingram Micro Inc. All Rights Res	served. — <u>Privacy Terma of Service</u> - Version 26.0.2644-	

- 1. Switch to the ${\it Categories}$ tab and click ${\it Add}$ ${\it Category}.$
- 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.

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