Tradeplace Product Information Management Services (PIMS)

User Manual

Version 1.8
29/11/2012

Table of contents

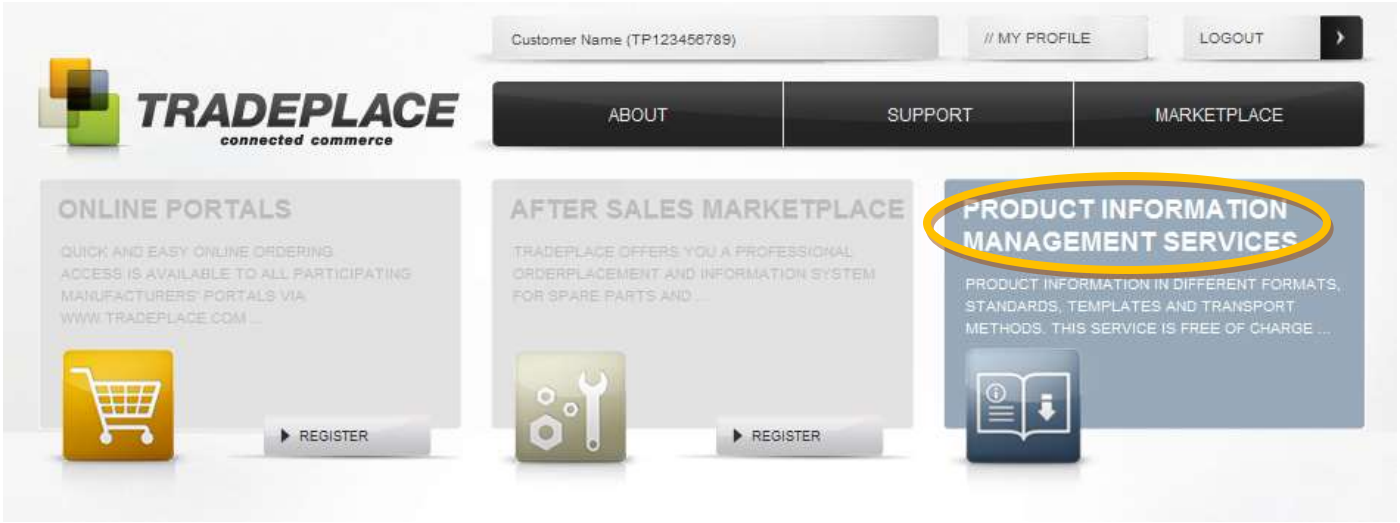
What is “Tradeplace Product Information Management Services” 3
Accessing “Product Information Management Services” 3
Available functions 4
Request for Activation 4
Data export 7
Creating a new data export profile 8
Step 1: Choose supplier 9
Step 2: Data Format 10
Step 3: Data Selection 11
Additonal Step for Excel and CSV: Format Details 11
Step 4: Sending options 14
Step 5: Confirm Summary 16
List of created profiles 17

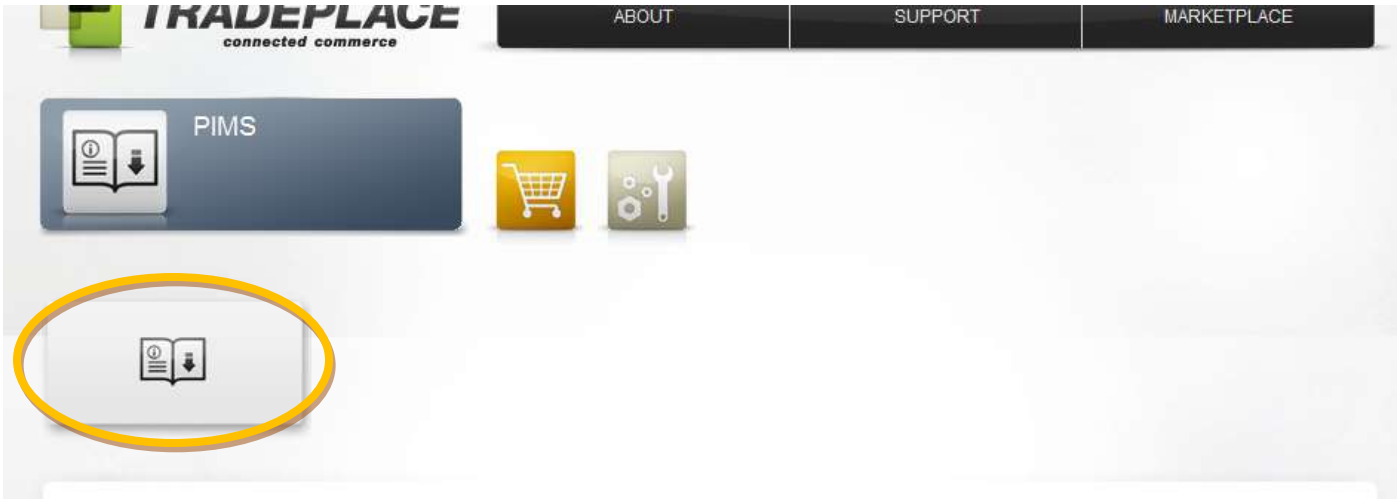
What is "Tradeplace Product Information Management Services"

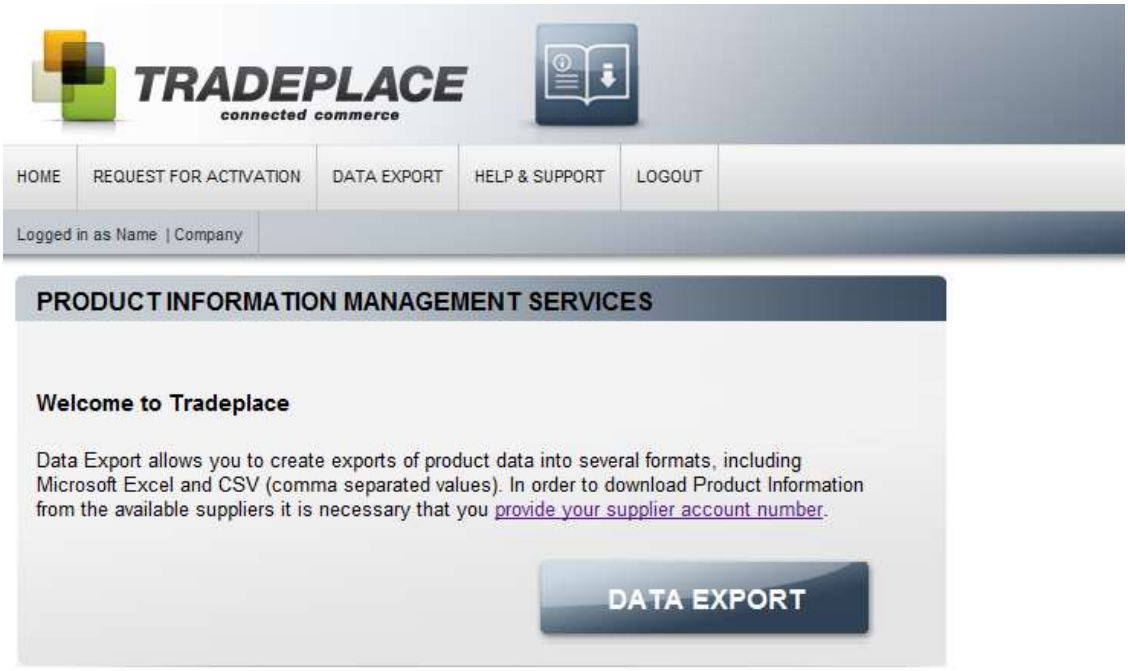
"Product Information Management Services" (PIMS) is a Tradeplace service for providing product specification data into a number of different formats currently available on the market.

Accessing "Product Information Management Services"

Access can be gained by clicking on PIMS logo which shall display the Home page of Product Information Management Services. The user is required to first register for PIMS services.







Available functions

Currently there are two main functions available in PIMS: "**Data Export**" and "**Request for Activation**".

"Data Export" allows the user to create exports of product data into several formats, including Microsoft Excel and CSV (comma separated values).

The function "**Request for Activation**" allows you to request the activation of your account number with the Supplier in order to export Suppliers Product Information.

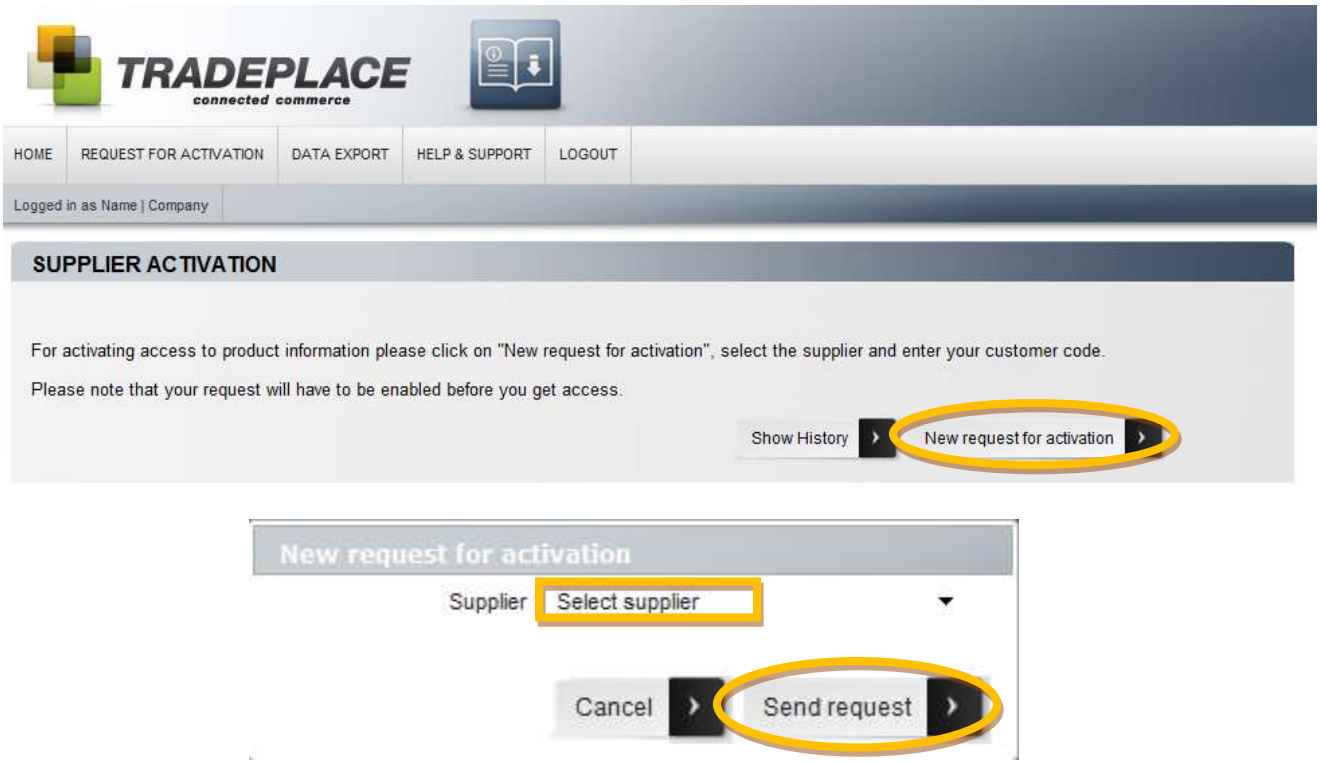
On the following pages you will get some detailed overview for each function.

Request for Activation

In order to download Product Information from the available suppliers it is necessary for the user to provide the supplier account number.

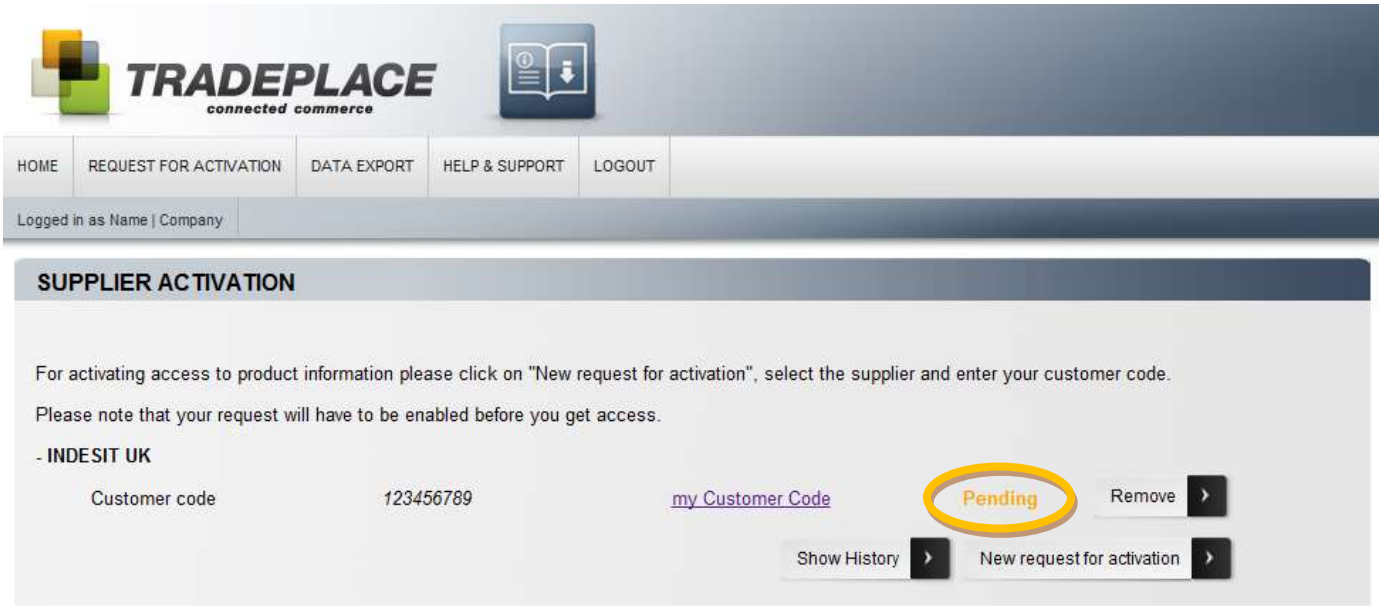
Click on the menu "**Request for Activation**" on the top menu bar (marked in yellow):

A new screen will be displayed for the user to click the "**New request for activation**" button.



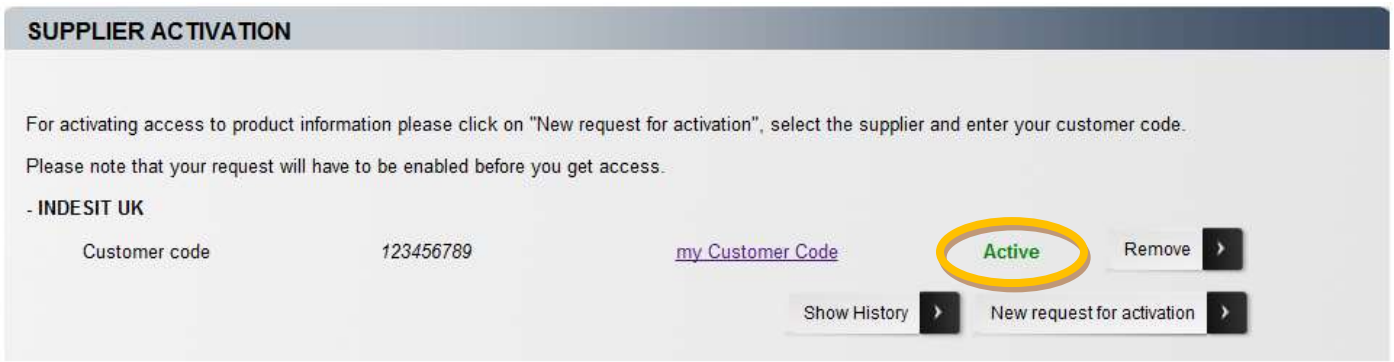
A new dialog will pop up where the user will have to select one of the suppliers available and to input the specific supplier account number. The Request can then be completed by clicking on "**Send Request**".

Please note until the selected supplier enables the user a "**Pending**" status will be displayed in PIMS and data export capability is on hold.



After the supplier has validated and if required amended the account number, the status will change to "**Active**".

If the activation request has been rejected the user will be informed accordingly.

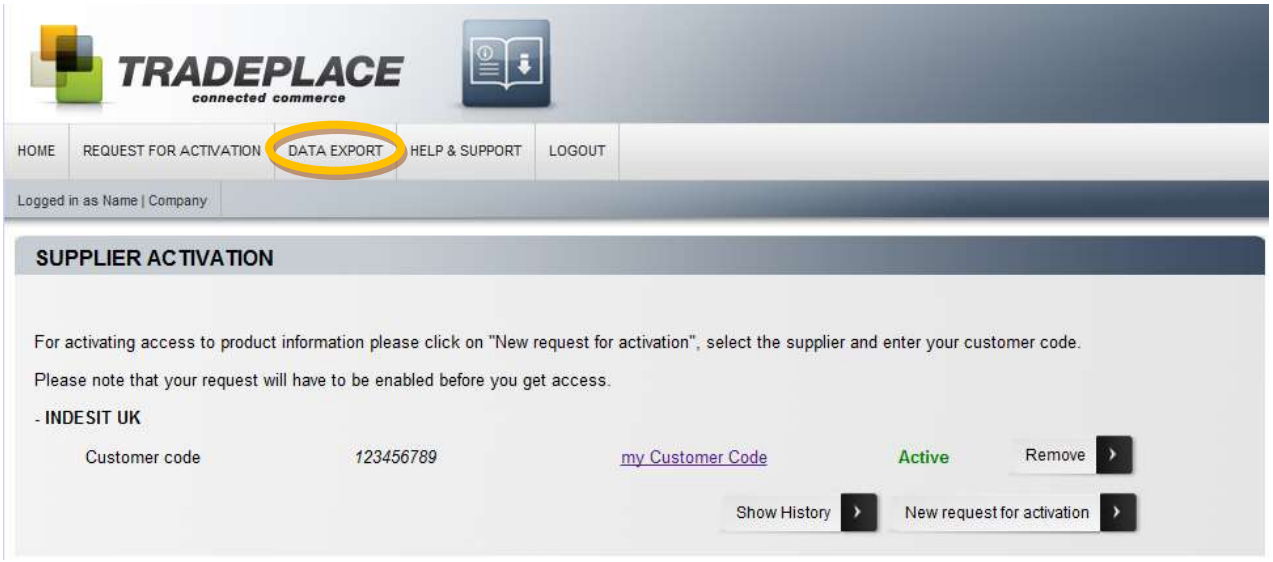


Additionally there is an option available, which gives PIMS the possibility, to export data based on a certain schedule. As the scheduled export is not activated by default, a request and approval by Tradeplace is needed.

Data export

The "Data export" function allows the user to configure the settings for the Product Information to export.

In order to use the "**Data export**" function, just click on the corresponding link in the upper menu bar.



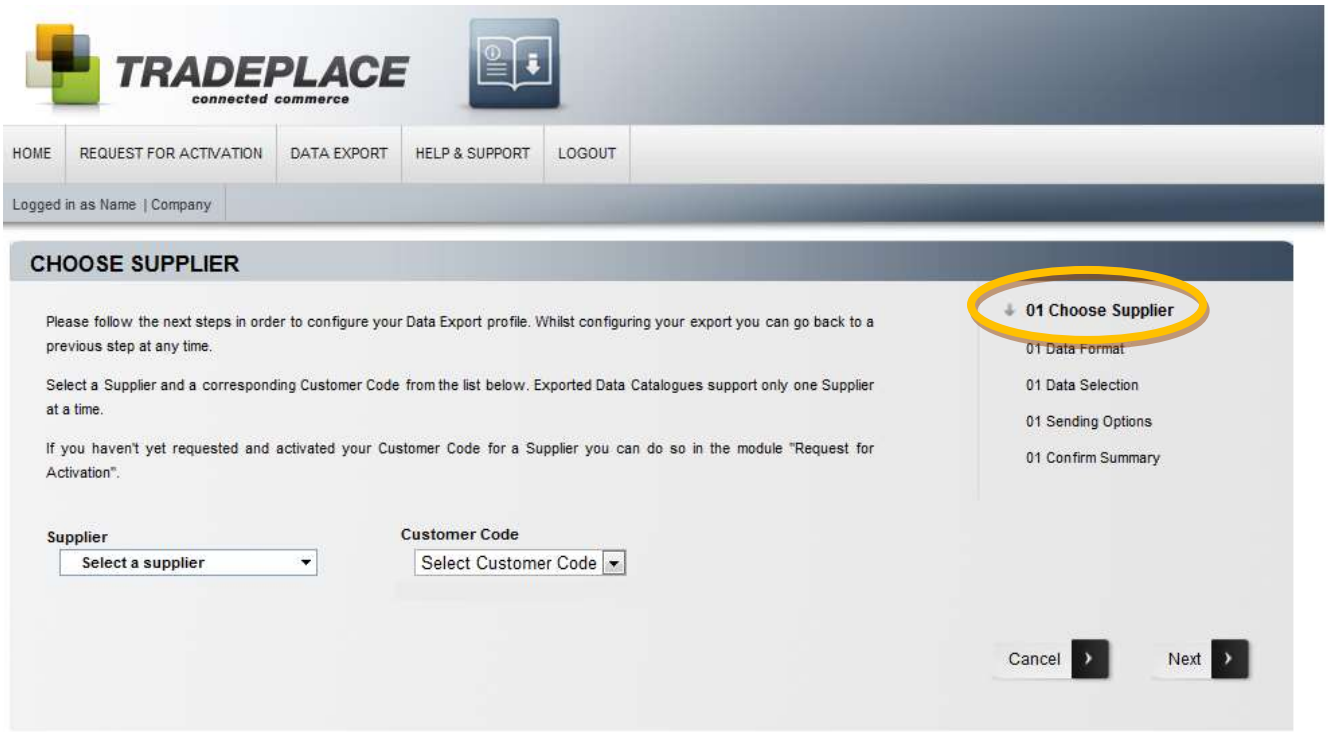
Initially an empty list of Data Export profiles will appear.

A data export profile contains all the necessary information about format and selections for exporting. The user is able to amend the selection of export format and settings by editing the profile. The user is able to create as many different export profiles as required.

Creating a new data export profile

In order to create a new export profile just click on the button on the lower right corner "**Create new export profile**".

The profiles settings are divided in several steps in form of a Wizard, that have to be carried out. On the right side the user gets an overview of the current step (marked in orange color) as well as the remaining steps.



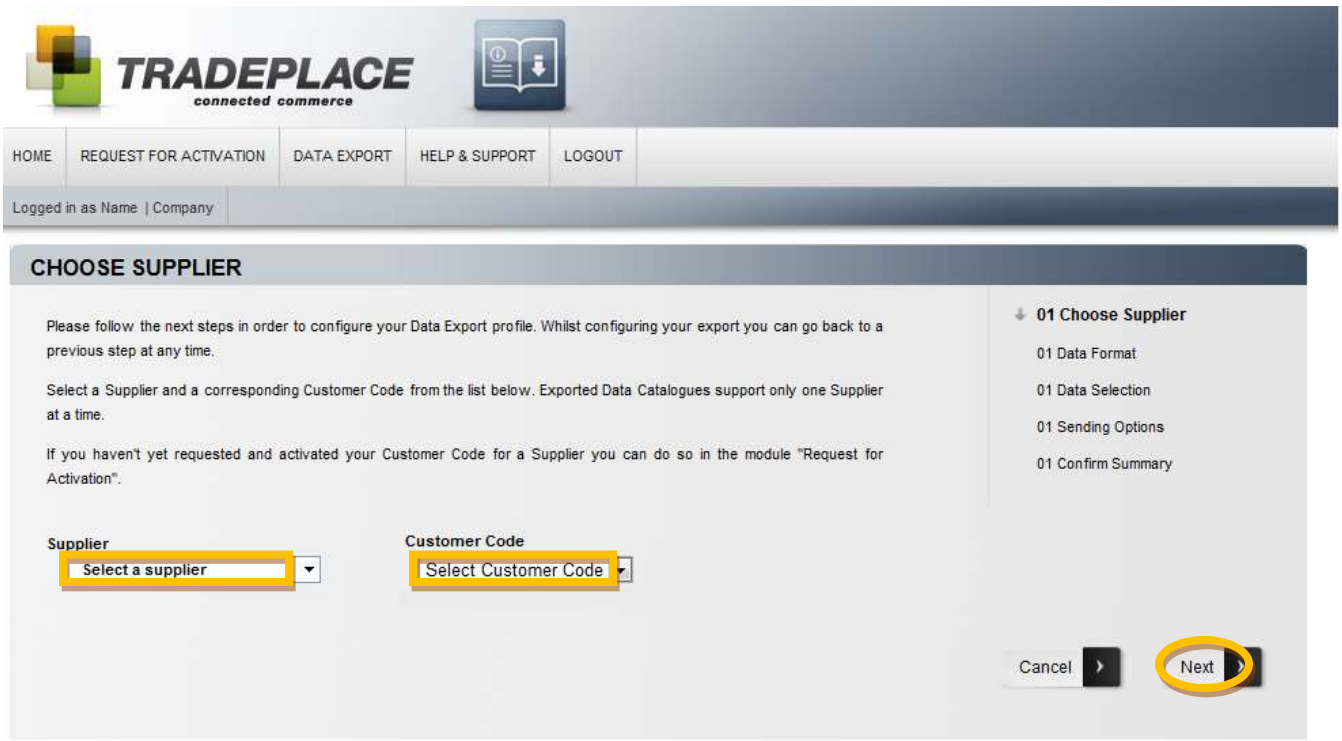
Step 1: Choose supplier

In the Data Export Wizard's first step the user will need to select a specific "Supplier" from the drop down list as well as the appropriate account number "Customer Code". This is necessary as in the next steps the options made available to the user will be based on this selection.

If after selecting a specific supplier the user gets following message "*You haven't any Customer Code for the Supplier. Would you like to request one?*" it means that the user has not yet requested any Customer Code activation under "**Request for Activation**" (see previous chapter).

If the user has already requested the activation for that supplier and he gets the mentioned message than the request is either pending or it has been rejected.

The user can review the status of activation requests anytime revisiting the function "**Activation settings**".



After selection of the desired "**Supplier**" and the appropriate account number "**Customer Code**" click on "**Next**" to advance. The user will note that the "Select Supplier" link now has a green tick left to it, meaning that the step has been successfully configured.

Step 2: Data Format

In the "**Data Format**" step the user will need to select an export format from the ones available. Depending on the options selected, the file the user will receive will be in the according format.

Click "**Next**" to continue.

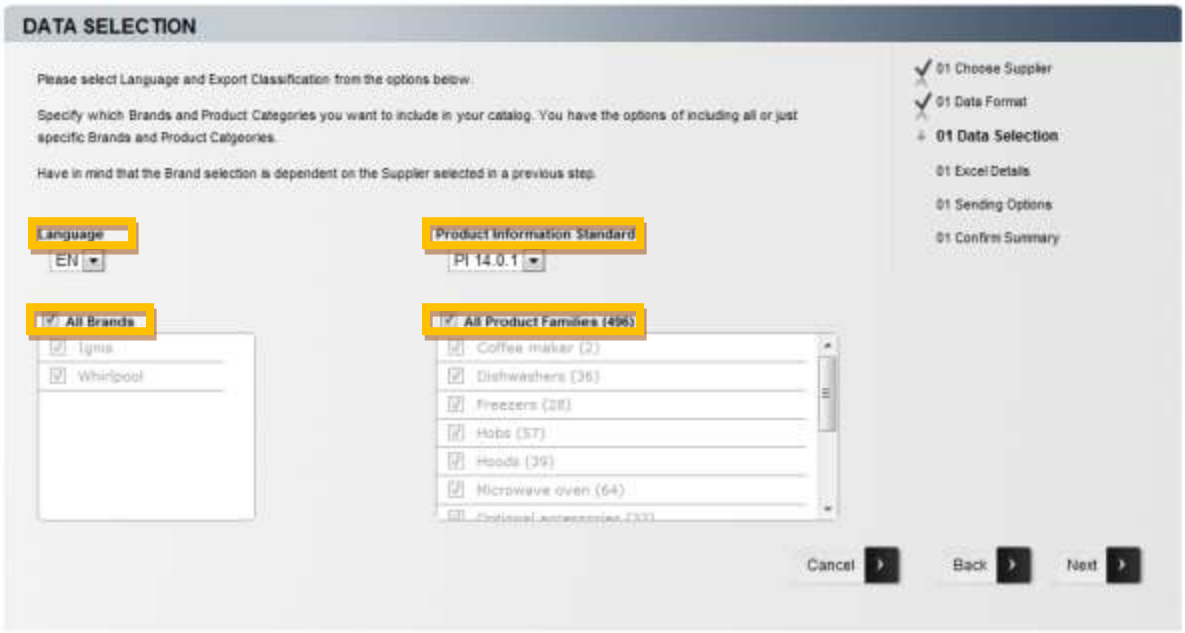
Depending on the "**Data Format**" chosen (like Excel or CSV) additional amendments can be made in a further step.

Step 3: Data Selection

In the "**Data Selection**" the user will be able to define the content to be exported based on the following options: *Language*, *Export Classification*, *Brands* and *Product Families*.

Options for inclusion are all or just specific Brands and Product Families. The number in brackets after each Product Family reveals how many products are available for the corresponding Product Family.

Click "Next Step" to continue after the required selection.



Additonal Step for Excel and CSV: Format Details

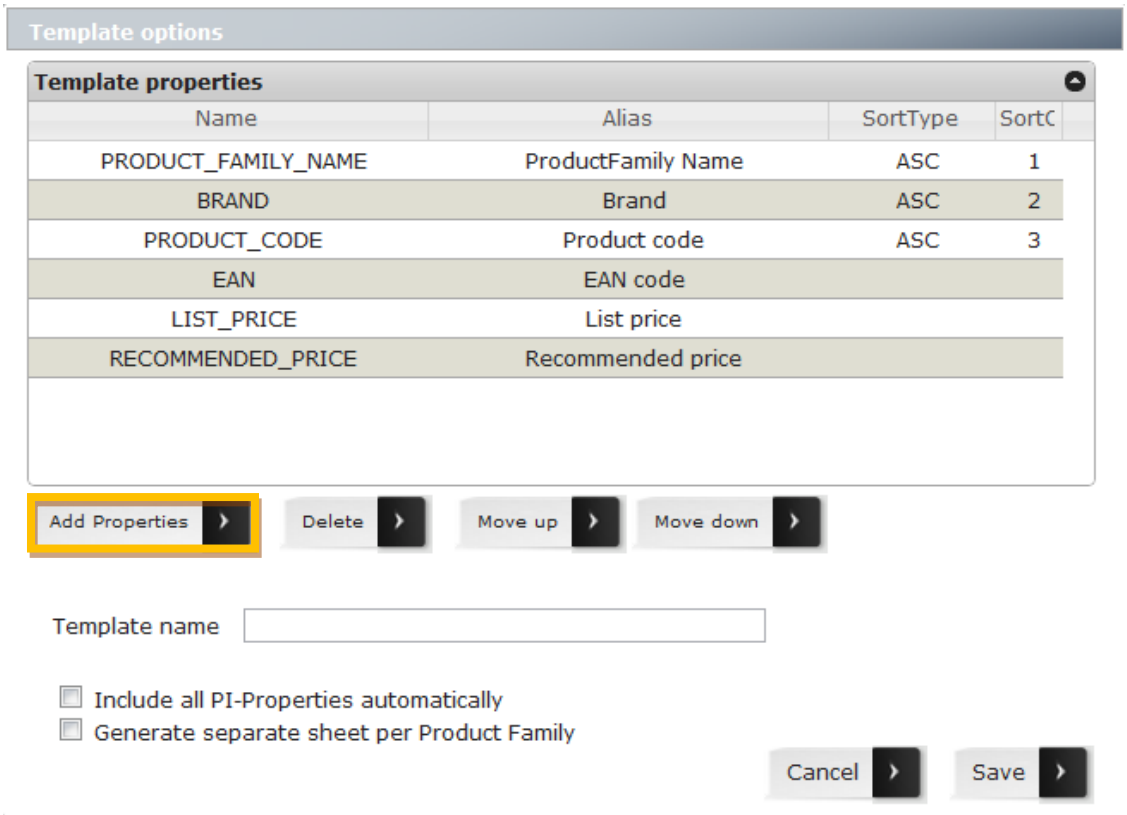
Excel or CSV file formats following additional step will allow the user to choose from predefined system templates or allow new ones to be created.

Templates includes information about the product information properties, their order of appearance, sorting and naming.

For creation of own template based on a predefined system template requires just selecting one from the drop down list and then clicking on "**Edit**".

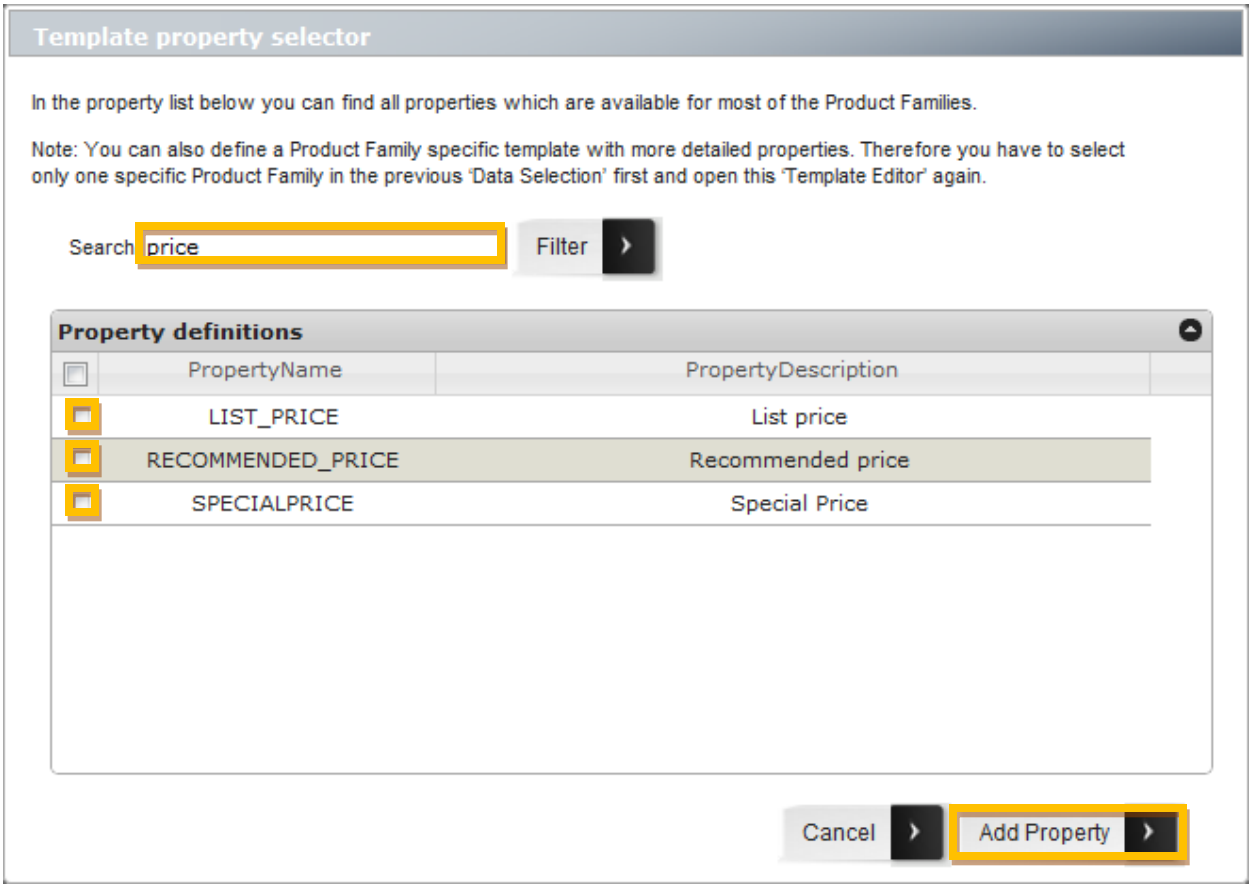
To create a new template from the beginning, just click on the "**New Template**" link.

Clicking either on "**Edit**" or "**New Template**" will open the Template Editor where the user can define which product information, product properties wishes to include in the template.



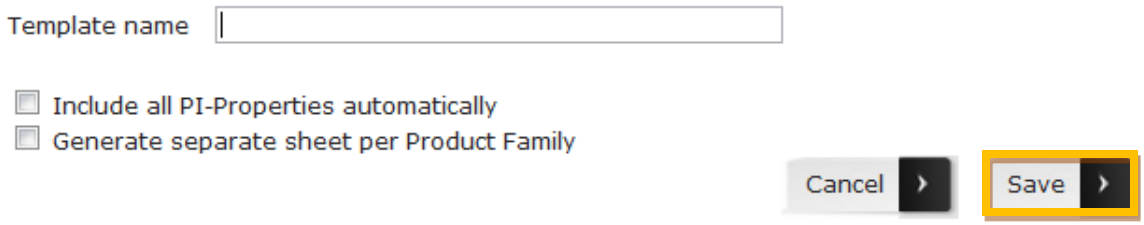
If the user has chosen to edit a predefined system template he will be able to add and delete product properties from the list and change their sorting and even specify their own property names by using "**Description**".

To add a new property the "**Add properties**" button has to be clicked and a dialog with a selection of available properties will appear.



Multiple properties can be selected by marking the checkboxes left to each property. The property list can be searched by entering a keyword into the search box.

To add the desired product properties the user has selected clicking the "Add Property" button will allow the user to return to the Template Editor.

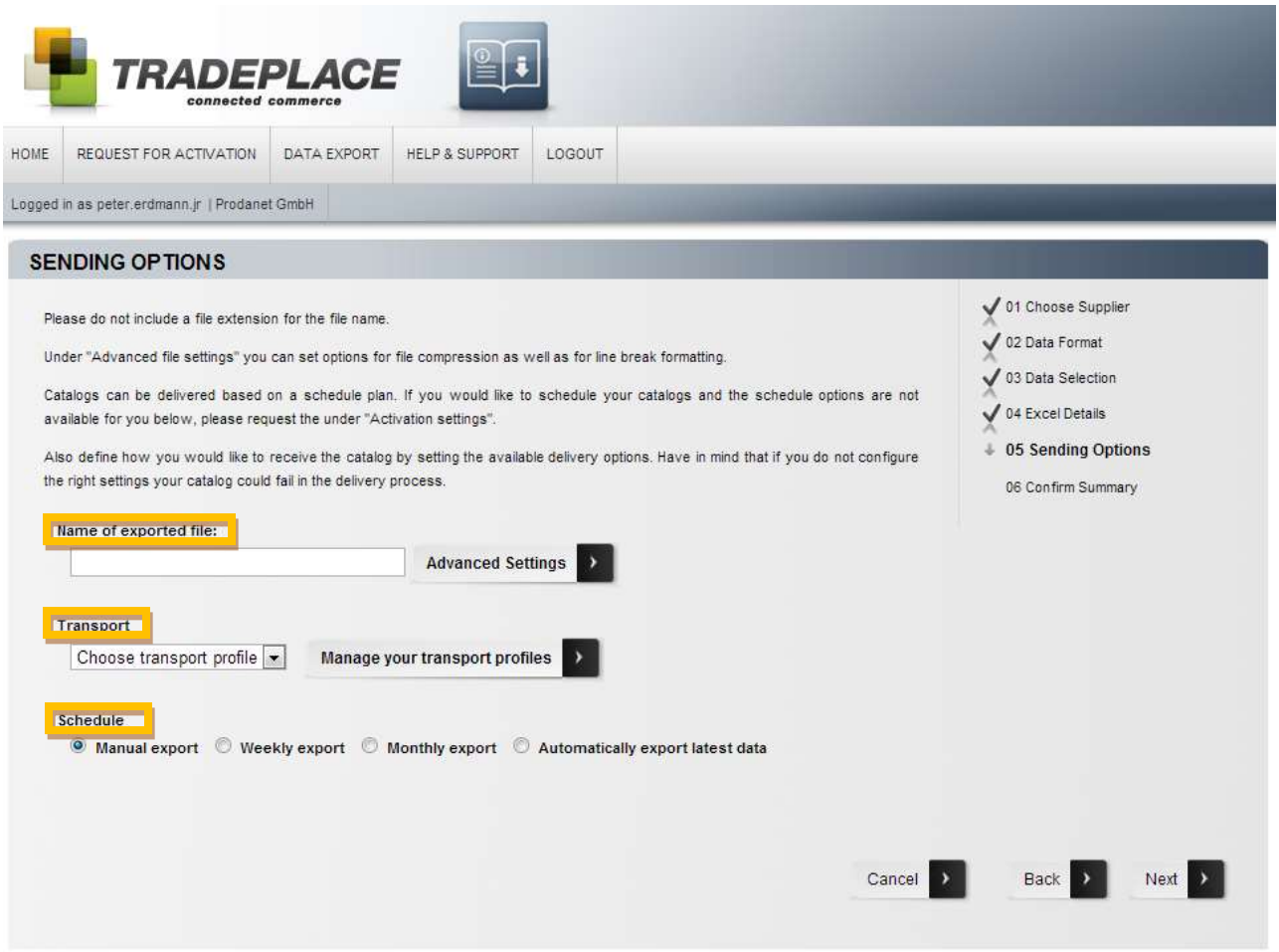


Specify the template by giving it a meaningful name in order to reuse it in the future. There are additional options depending on the export format that will allow the user to include either all PI Properties at once or generate a separate sheet per Product Family. Save the template.

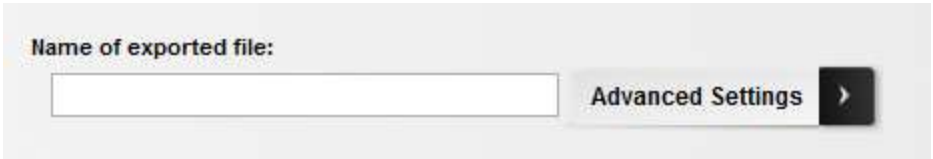
After either selection of a predefined template or creating new based on specific requirements, click on "**Next**" to continue to the "**Sending Options**" step.

Step 4: Sending options

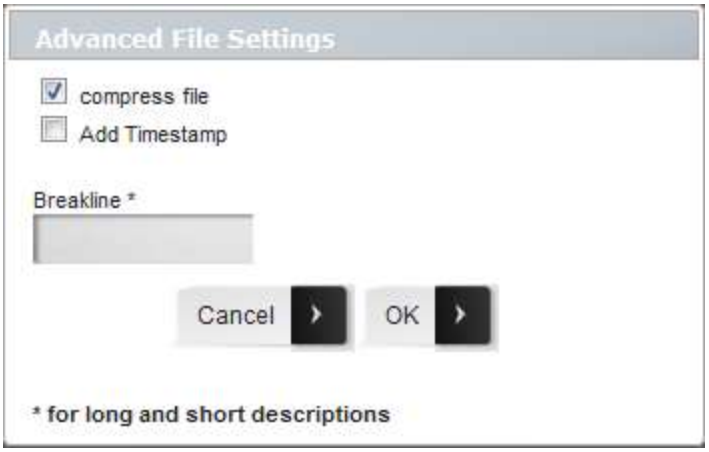
Once the content and data format have been defined, the next step is to define how the data export has to be delivered.



A file name is required and it is important to leave out the file extension as it will be added automatically depending on the export format chosen.

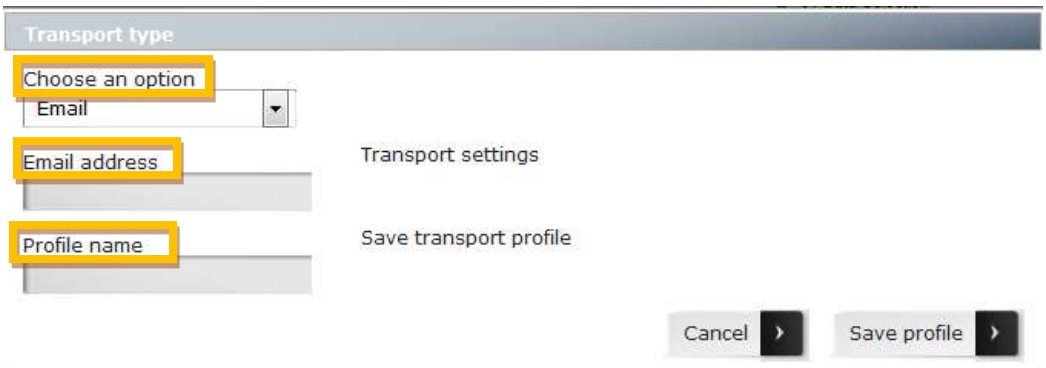


There are additional advanced settings available such as file compression and break line formatting for the long and short descriptions that can be set by clicking on "**Advanced Settings**" (to the right of the file name textbox):



The required method of data transport mode will required to be specified by the user e.g. *Email* or *FTP/FTPS*. Therefore it is necessary for creation of transport profile that will include all the necessary information. Creating your transport profile once will allow the user to reuse it for future Data Export Profiles.

By clicking on "**Manage your transport profiles**" you can set the necessary settings for *Email* and *FTP/FTPS* delivery and saving the transport profile with a given name for future reuse.



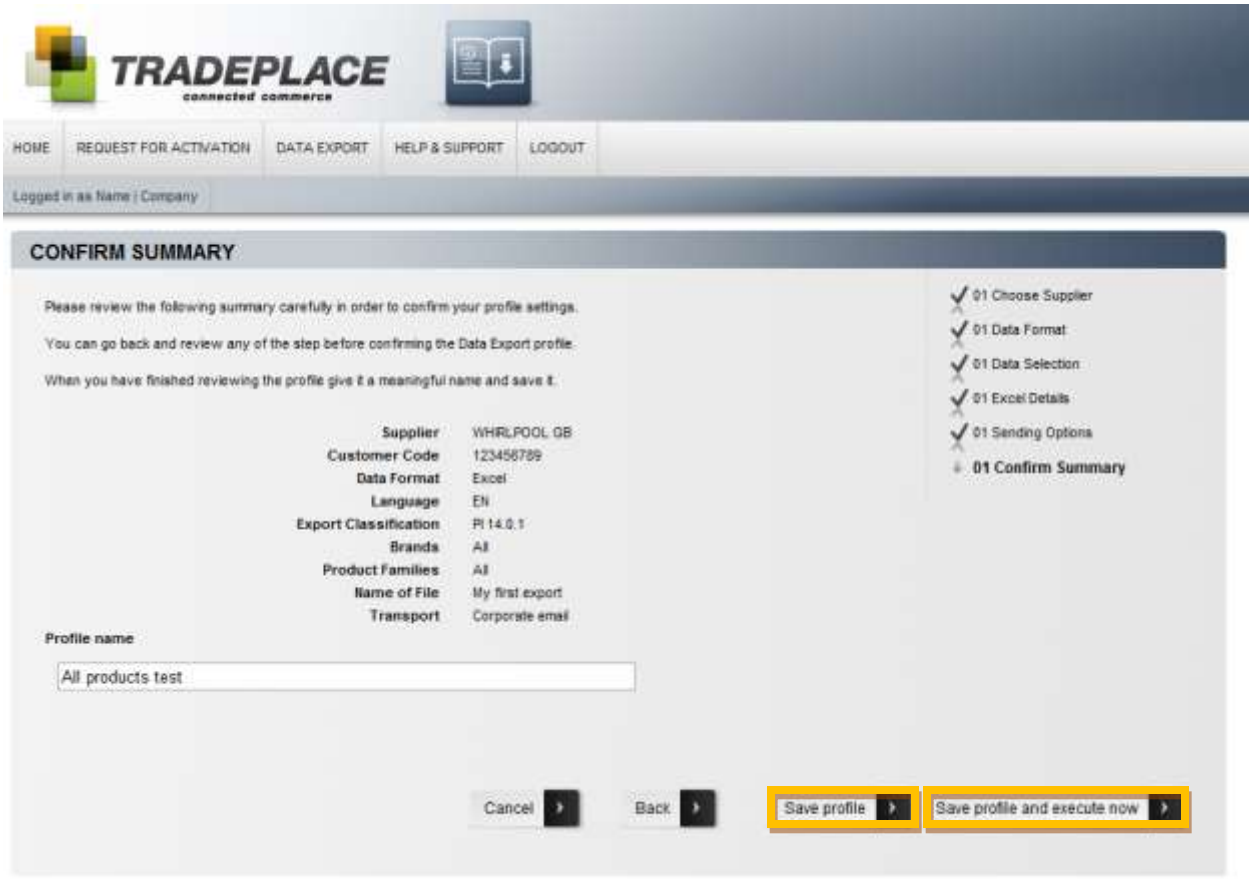
Optionally, if the schedule option has been requested and been approved (see previous chapter "**Request for Activation**"), the data export can be scheduled either weekly, monthly or automatically.

The last option "**Automatically export latest data**" enables exporting data, based on your export profile settings, automatically as soon as the selected Supplier has uploaded new information to PIMS.

After completion of the schedule, click on "**Next**" in order to review all the settings in the summary.

Step 5: Confirm Summary

Before saving and executing the created export profile the user can review all the settings from previous steps.



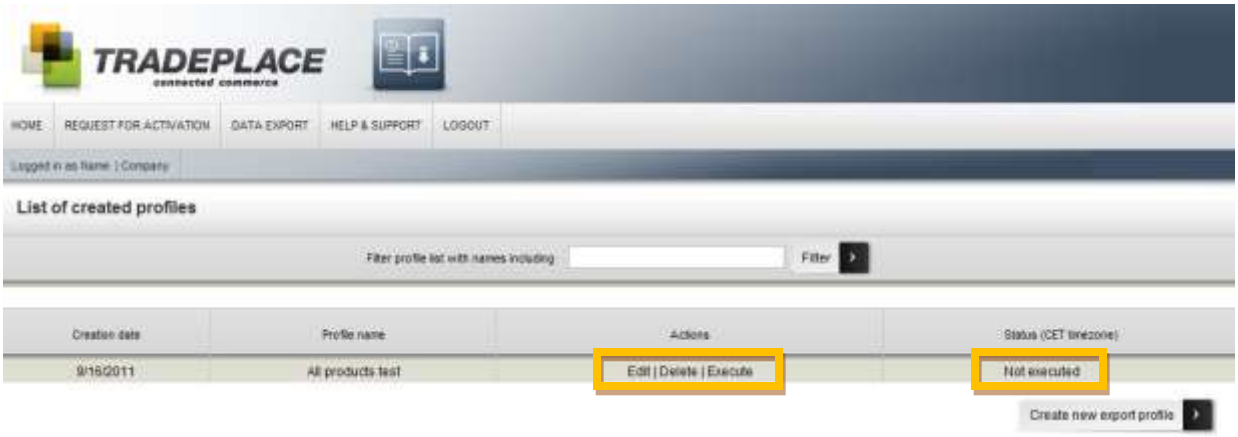
At any given moment the user can go back to previous steps by clicking on "**Back**" and amend the settings.

After reviewing the profile provide a meaningful name and save it by clicking on "**Save profile**". The profile gets saved including all settings performed in each of the steps.

If the user's wishes to save the profile and immediately execute it, it can be done by clicking on "**Save profile and execute now**" instead.

List of created profiles

All saved data export profiles can be viewed by clicking.



In order to change any settings data the user can click on: *Edit*, *Delete* and *Execute*. With *Edit* the user will start the Data Export Wizard again, in which each step will have the users information settings preloaded, for changing if needed.

By clicking on *Execute* PIMS prepares the data export file to be delivered via Email or FTP/FTPS (depending on the transport settings). In the "**Status**" column information about the current status of that specific Data Export (initializing, running or finished) will be provided.

You can create as many Data Export Profiles as you like. When your list of profiles gets longer you can make a selection by filtering them by its name, entering a keyword in the box "Filter profile list with names including".

When deleting a profile the user will have to confirm that action. Note that all your profile settings will be deleted.

Templates as well as Transport profiles are not affected as they could be shared by other profiles. To delete Templates or Transport Profiles the user will have to delete them from the corresponding steps.