

Product Maintenance

Overview

All the products on your website are initially integrated from your ERP, but did you know there's product information that can also be maintained via the CMS, completely independent of ERP systems?

To maintain products online, the 'Product Maintenance' feature must be enabled in Feature Setting. If this wasn't done during your site's implementation phase, you can enable it yourself.

Once enabled, configure Product Maintenance settings to suit your website and workflow. Certain settingsh determine the options available in the Product Maintenance page (**Products & Categories Product Maintenance**) where a product's details can be edited in the CMS (Step 3 below).

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1. Enable and configure Product Maintenance Settings

Once the **Product Maintenance** feature is enabled and options have been configured, you're ready to maintain products in the CMS.

1. In the CMS, go to **Settings Settings Feature Management Products & Categories Product Maintenance**.



Feature Management			
Search for a feature...			
	Feature	Available in CMS	Options
<div>Content16></div> <div>Payment & Checkout14></div> <div>Products & Categories10></div> <div>System7></div> <div>User6></div> <div>Advanced3></div>	Cluster LineType Maintenance Maintain Cluster LineType information online.	<input checked="" type="checkbox"/>	Configure
	Cost Centres Configure Cost Centre options for your website.	<input checked="" type="checkbox"/>	Configure
	Custom Catalogues Create web-based catalogues for specific customers.	<input checked="" type="checkbox"/>	
	Integrated Category Maintenance Integrate your category structure from PREHTO, but maintain additional category content online (such as images).	<input type="checkbox"/>	
	Most Popular Products Enable Most Popular Products functionality (in conjunction with Baynote).	<input checked="" type="checkbox"/>	Configure
	Online Category Maintenance Maintain all category information online (e.g. category structure as well as additional content).	<input checked="" type="checkbox"/>	Configure
	Product Documents Maintain product documents.	<input checked="" type="checkbox"/>	Configure
	Product Features Configure product feature options.	<input checked="" type="checkbox"/>	Configure
	Product Maintenance Maintain product information online, such as ribbons, alternates, accessories, and notes, for example.	<input checked="" type="checkbox"/>	Configure

2. Click **Configure**.



3. Tick the product feature options you wish to maintain in the CMS.

Setting	Description
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Enable Product Description

☒ Enable Product Description Field
 

Product Description Field Prompt



Product Description
 

Enable Product Description: Lets user enter a description



NOTE - If field is unavailable or blank for a product, the system will not display the field.

Product Description Field Prompt: Edit the field label if required

Enable Product Notes

☒ Enable Product Notes Field
 

Product Notes Field Prompt

Product Notes
 



Enable Product Notes: Displays the 'Product Notes' field



Enable Product Notes Field. Default: ticked.



Product Notes Field Prompt: Edit the field label if required



NOTE - To display this field to shoppers in the Product Details page, you must also enable the 'Product Notes' field in the Product Maintenance settings.



Enable Note Fields 1 - 5

☐ Enable Note 1 Field
 

☐ Enable Note 2 Field
 

☐ Enable Note 3 Field
 

☐ Enable Note 4 Field
 

☐ Enable Note 5 Field
 

Available in Product Maintenance only in ERP Maintenance

Enable Note Fields 1 - 5 - these fields are different from the standard product notes

Note fields contain either extra data stored in the ERP system or fields can be displayed in Product Maintenance.





- See [PRONTO Integration - Product Notes](#) for more information


NOTE - To display this field to shoppers in the Product Details page, you must also enable the 'Product Notes' field in the Product Maintenance settings.

☐ Hide Product Is Gift Card Option Field
 



☒ Allow Ordering Gift Card With Gift Card
 

☒ Enable Maintenance of Postage and Handling
 

☒ Enable Maintenance of Ribbon Flag
 

☒ Enable Contract Ribbon Overrides
 

☒ Enable Maintenance of Warranty
 

☒ Enable Maintenance of Product Categories
 

Online maintained fields

Show or hide these settings for online maintenance for a product

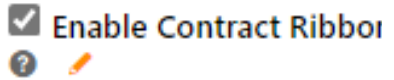
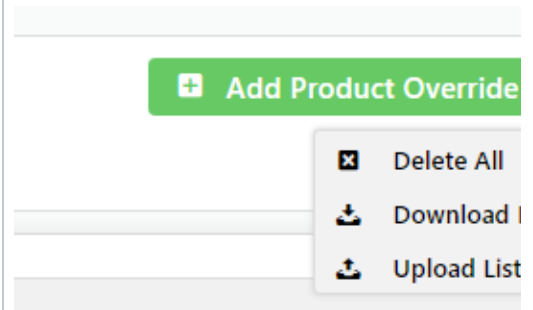
- **Hide Product is Gift Card Option field** - untick to allow
- **Allow Ordering Gift Card with Gift Card** - tick to allow
- **Enable Maintenance of Postage & Handling** - tick to allow
- **Enable Maintenance of Ribbon Flags** - tick to let ribbon flags be used in Product Maintenance. (See step 5 below.)
- **Enable Contract Ribbon Overrides** - tick to set a ribbon flag
- **Enable Maintenance of Warranty** - tick to enable a warranty
- **Enable Maintenance of Product Categories** - tick to allow products to be added to integrated online). Also allows products to be added to Online mode.



The system setting 'Disable Product Category' in the CMS will be for reference only, as it will be overridden by the CMS.

In the CMS, go to **Settings** **Settings** **Settings** to manage product categories

<p>Integration Mode</p>	<p>Default mode: 'Default'. Product Master data is integrated meet condition requirements.</p> <p>'Online': This enables Online Category Maintenance so th</p> <div data-bbox="990 262 1494 373"><p>Categories</p><p>Create and remove categories. Hover over category names to see the category code</p><p>Collapse Section</p><p>Category</p><p>Add Category</p></div>
<div data-bbox="354 436 893 688"><div><input checked="" type="checkbox"/> Enable Maintenance of Product Accessories</div><div><input checked="" type="checkbox"/> Enable Maintenance of Product Alternates</div><div><input checked="" type="checkbox"/> Show Category Code In Drop Down</div></div>	<ul style="list-style-type: none">• Enable Maintenance of Product Accessories - all• Enable Maintenance of Product Alternates - allow• Show Category Code in dropdown - appends the <div data-bbox="990 499 1494 766"><p>OFF</p><div><input type="text" value="sports"/></div><div>Sports & Outdoors</div></div>
<p>Maintenance Mode</p>	<p>Setting affects what fields are displayed and/or can be ed</p> <p>ERP: Displays specific product information in Product Ma product content can be edited in the CMS.</p> <p>Web: Displays product details fields that are maintained c</p> <p>Web mode:</p> <ul style="list-style-type: none">• is required for the Product Restrictions feature• disables product security masking• allows product prefix functionality• permits custom groups (custom field setup when edi• allows adding a new product• shows APN• permits user region security mask.
<p>Ribbon Flag Options</p>	<p>Online maintained field</p> <p>Appears only if 'Enable Maintenance of Ribbon Flag' abov the-box ribbon flags can be used or custom ones can be i</p>

<p>Contract Ribbon Flag Options</p>	<p>Enable ribbons added to contracted products for specific</p> <p>Contract ribbons allow different ribbon flags to display age level.</p> <p>NOTE - A ribbon flag set here for a contract type will over</p> <p>To add a specific ribbon for a price code that applies only</p> <ol style="list-style-type: none"> in Price Code, enter the applicable price code. In Contract Type, if a Customer is further differentia In Contract Ribbon Filename, to upload the ribbon Click Save or Save & Exit. <p>Product Override You can enable Product Override so that specific product</p> <ol style="list-style-type: none"> Scroll up to Feature Options and ensure Enable Coi  <ol style="list-style-type: none"> Scroll back down to Contract Ribbon Options. For the ribbon you want to add the product exception Click the Add Product Override button. In Product Code, enter the code of the product to e: In Filename, click Select or Upload Image and sele Click Save & Exit. <p>You can also bulk import, export or delete product overria</p> 
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4. When you have finished setting the options, click **Save** or **Save and Exit**.

Once Product Maintenance settings have been configured, go to **Product Maintenance** to perform maintenance functions for a product based on these settings.

2. Search for a Product

To add custom filter options, see [Product Search Custom Filter Options](#).

To maintain one or more products, go to the product's Product maintenance page.

1. Go to **Product & Categories Product Maintenance**. All products are automatically listed.

2. To find a product, in **Product Search**, enter the product code, product name or keyword relevant to the product. Leave it empty if you want to find all products by a particular filter.
3. To add a filter, select a filter in the **Filter** dropdown, otherwise leave it as 'All'.
4. To run the search, click **Search**. Products found by your search criteria will be displayed. You can edit a product by clicking **Edit** next to the product.
5. To clear your search and return to the default 'Product Search' screen, click **Reset Search**.

3. Product Maintenance Options

In the Product Maintenance page, click **Edit** for a product's Product Maintenance page. Notice the displayed fields and what is editable depend on the modes and configurations in Settings (Step 1 -'Configure Feature Settings').

The Product Maintenance page is divided into sections. If a section detailed here does not appear, it's likely that the feature has not been enabled in 'Feature Settings'. If you need this feature, return to Step 1 for guidance.



Expand/Collapse Sections

To aid ease of viewing, each section can be opened or collapsed. Click 'Expand Section' or 'Collapse Section' as you need.



ERP Product Data

Uneditable product information



Expand Section



Product Information

Editable product information stored in CSS



Collapse Section

1. ERP Product Data

Maintenance mode: ERP This section displays product information integrated from your ERP. The data are for reference only as they are not editable in the CMS.



ERP Product Data

Uneditable product information

Code

CV101

Description

Endurance E400 Elliptical Trainer

Unit Description





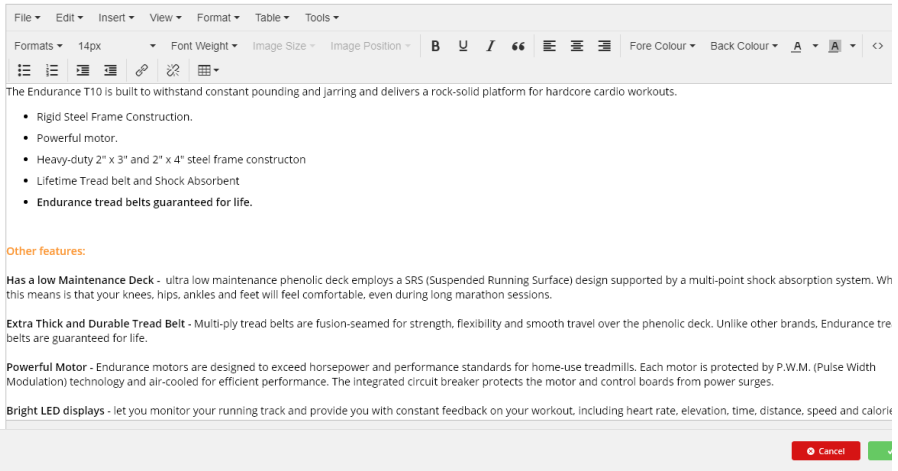
EACH


^ More

2. Product Information

The Product Information section contains product fields that can be edited in the CMS. Below is a table containing each field and its usage.

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Field	Usage
<p>Display Online</p>  <p>Display Online</p>	<p>(Appears only if Integration mode is 'Online' and Maintenance: web; otherwise, a product's status defaults to 'Offline').</p> <p>Determines whether the product is active and searchable by users on your website.</p> <ul style="list-style-type: none"> OFF: you will see the message 'the product is not considered Item Valid (The 'Display Online' set users on your site. ON: the product has the status 'Active' in Product Maintenance and is searchable. <div>  <p>Why is my product not searchable?</p> <p>If 'Hide Child Attributed Products' is active on your site (see Product Variants help), one of the reasons for a product not being searchable are reminders that whether an active product is searchable also depends on:</p> <ul style="list-style-type: none"> whether it is a child product. Child products will not be listed in search results when the child product includes an alert that it is not searchable. Only the Master product will be listed in search results. <div> <p>The following configuration may prevent this product showing up in product searches:</p> <ul style="list-style-type: none"> the 'Hide Children Attributed Products' system setting is enabled. As this product is a variant of another product it will be hidden This product is a Child of these Products <ul style="list-style-type: none"> FATMAX® THRU TAND WOOD CHISEL (FATTRUTANG) <p>- Category and Search cache might affect the visibility of this product.</p> </div> <ul style="list-style-type: none"> whether Category and Search caches have been refreshed after updates or configuration changes to products, including Master products. See All about Cache Management help. <div> <p>The following configuration may prevent this product showing up in product searches:</p> <ul style="list-style-type: none"> Category and Search cache might affect the visibility of this product. </div> </div>
Title	<p>Rendered by the Product Title widget on the Product Detail template.</p> <p>If left blank, defaults to product description from the ERP.</p>
Sub Title	<p>Displayed if the 'Show Subtitle?' option is enabled in the Product Title widget.</p>
Product Description	<p>Displayed through the Product Description field in the Product Field widget.</p> <div>  <p>icon.</p> </div> <div> <p> Edit: Product Description</p>  </div> <p>When you have finished editing, click Save.</p>
Product Notes	<p>Adds product feature notes. To display on the Product Details template, use the Product Field widget and select 'Product Notes'.</p>
Notes (1 - 5)	<p>This content can be integrated from the ERP or added online. Display on the Product Detail page using the Product Field widget and select 'Product Notes'.</p>
Postage and Handling	<p>This content is stored in the Product table under 'PostageAndHandling' and can be displayed via the Product Field widget and select 'PostageAndHandling'.</p>

Warranty	This content is stored in the product table under 'Warranty' and can be displayed via the Product Field
Ribbon Flag	<p>A ribbon flag can be set to display on the product image. See: Product Ribbons</p> 
Ribbon Start Date / Ribbon Expiry Date	A ribbon can be displayed for a specified period, e.g., for a limited time promotion. Set Start and Expiry on the Expiry Date/Time.
Is Gift Card	If this product is a gift card, toggle ON. Use a Product Field widget and the field IsGiftCard to display th
Show Price as POA	ON: 'POA' (price on application) is shown instead of the product price.
Is Dangerous Goods	ON: flags the product as a dangerous item. Use a Product Field widget and field IsDangerousItem to c
Is Free Freight	ON: flags that the product has free shipping. Use a Product Field widget and field IsFreeFreight to disp
Is Tailgate Required	ON: flags that the product requires tailgate delivery. Use a Product Field widget and field IsTailGateRe
Is Email Delivery	ON: flags that the product is delivered by email. Use a Product Field widget and field 'IsEmailDelivery'
Is Returnable	ON: flags the product is returnable. Use a Product Field widget and the field: 'IsReturnable' to display t
Delivery and Pickup Option	Select whether the product is Delivery, Pickup or both. This will display on the Product Detail and Shop both.

Here's an example of a product's Edit Product page, and the resulting output on the website. Keep in mind that this site's Product Detail template contains several Product Field widgets, each displaying content from a different field in the Product table.

Product Maintenance in CMS	Resulting O
9	

Product Information
Editable product information stored in CSS

1

Title

My Product Title - Elliptical Trainer

2

Sub Title

My Product Subtitle

3

Product Description

Format

B

U

I

A

Endurance Center Drive elliptical trainers are the perfect blend of research, engineering, performance and technology. Patented technologies have been applied to provide a stable, space-efficient platform to perform rigorous low impact full body workouts.

The combination of a natural stride, quality manufacturing and superior programming have created the latest evolution in cardio training. To ensure the best fit for users of all sizes, the E400 features an adjustable stride. The E400 also features wireless heart rate control with advanced heart rate programs.

4

Product Notes

Format

B

U

I

A

Here are some product notes:

- Some assembly required
- 2-person lift recommended

5

Postage and Handling

Format

B

U

I

A

This product will incur additional freight charges outside of metro areas.

6

Warranty

Paragraph

B

U

I

A

5 Year Warranty

7

Ribbon Flag

C

Ribbon Expiry Date

9/09/2016 12:00 AM

Show Price As POA

☐

3. Categories

Available only if 'Enable Maintenance of Product Categories' was ticked in Settings AND Online Category Maintenance mode is on. Assigning categories to products can be done in [Category Maintenance](#). **NOTE** - Online Category Maintenance should be enabled.)

A product is assigned to one or more Categories. In this section, you can add the product to as many categories as required.

Click the **Add Category** button, then start typing the category name in the input field. Suggestions will be returned as you type . Select the required category from the list.

Categories
Create and remove categories. Hover over category names to see the category code

Category

Sports & Outdoors > Fitness > Exercise Machines

Add Category

Delete

To remove a category, tick the '**Delete**' option. When you click **Save** at the top of the page, the deletion will be completed.

4. SEO Fields

Search-engine friendly URL, Page Title, and Description tags for the product are maintained here.

These values are normally auto-generated on first integration. Edit any of these values as required and they will not be overwritten on subsequent integration events.

Q SEO Fields

Search Engine Optimisation related values

Seo Url

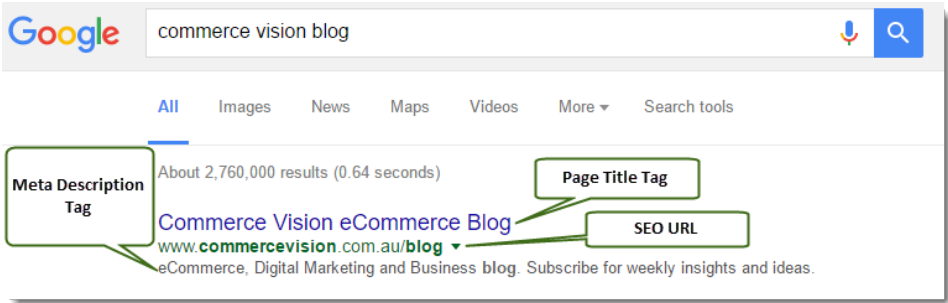
/endurance-e400-elliptical-trainer-cv101

Page Title Tag

Endurance E400 Elliptical Trainer | Exercise Machii

Meta Description Tag

Endurance E400 Elliptical Trainer

Field	Description	Example
SEO Url	The user- and search engine-friendly URL for the product page.	<p>Here's an example of these SEO settings in the real world.</p> <p>The Commerce Vision Blog is obviously not a product, but the principles are the same.</p> 
Page Title Tag	The title that displays on search engine results pages, just above the URL.	
Meta Description Tag	The blurb that displays under the Title and URL.	

5. Custom Fields

NOTE - This section is displayed only if custom fields have been created in the Product table and they are marked 'active'.

∞ Custom Fields

Modify custom field value

Sample Custom Field

test

Need more information? See [Add Custom Fields To Products and Categories](#).

6. Media

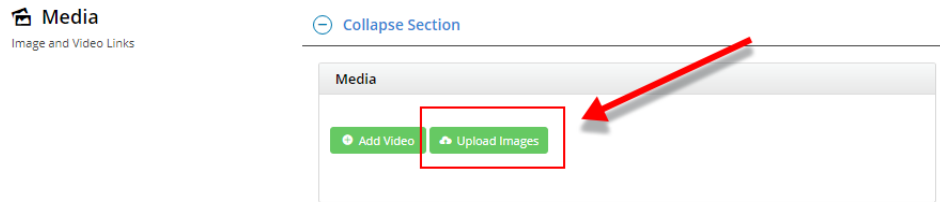
Images and videos that display in the product's gallery are uploaded here. When you upload an image, the original image will be duplicated 4x to images with different pixel sizes. Images uploaded via the [Integrator](#) will also appear in this section. You can re-order images by dragging and dropping. **TIP** - Guide to maximum file sizes to ensure fast loading: 250kb, mobile: 50kb.



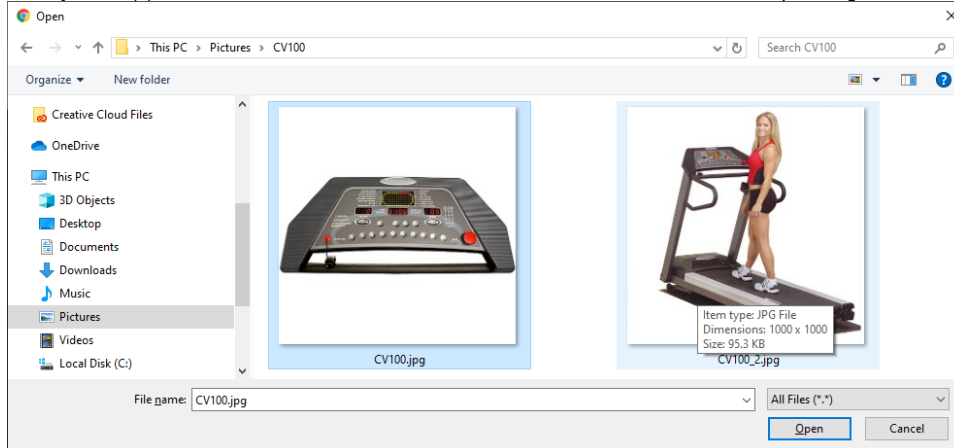
By default, the CMS-uploaded image at the top of this list will be the first image displayed in any search on your site and on the Product Detail page. If a product has images uploaded via the Integrator and the CMS and you want the first Integrator-uploaded image to display first, contact [Commerce Vision](#) to enable this option. **NOTE** - Available only for versions 4.21.02+.

Adding Images

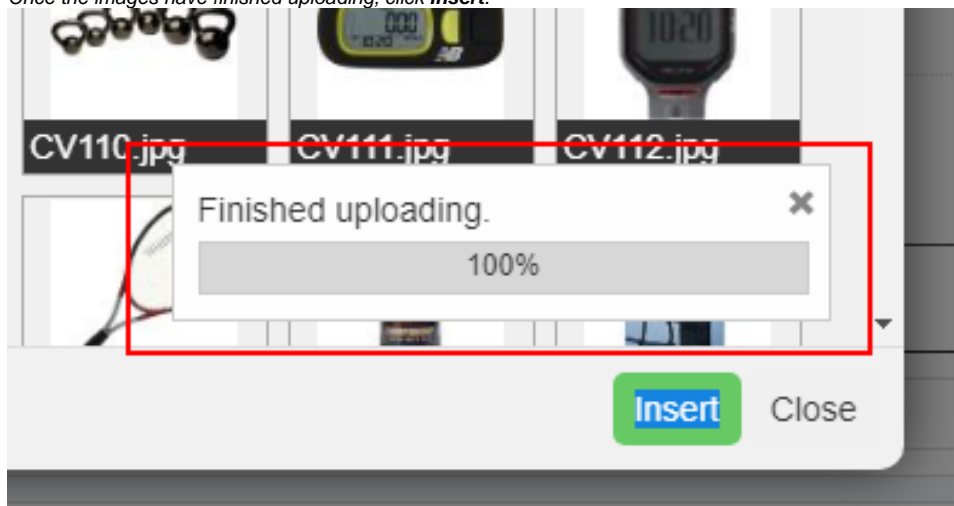
1. To add an image or multiple images simultaneously, click **Upload Images**.



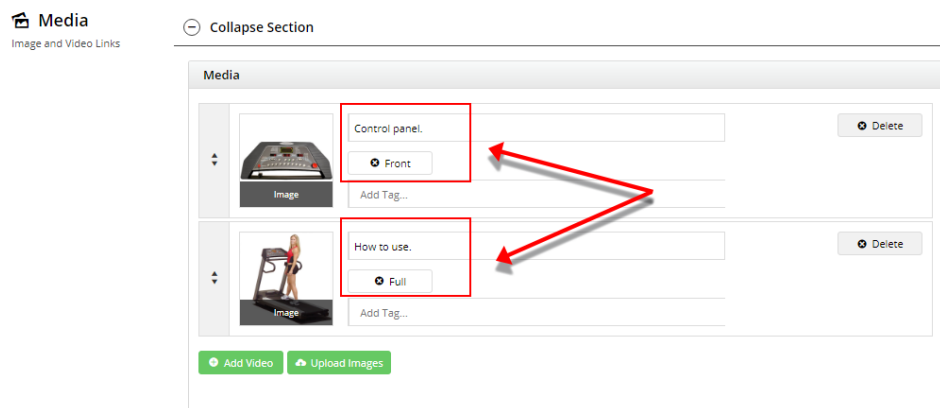
2. Go to your file(s) and click on them to select. Use 'Ctrl-click' or 'Shift-click' to select multiple images. Click **Open**.



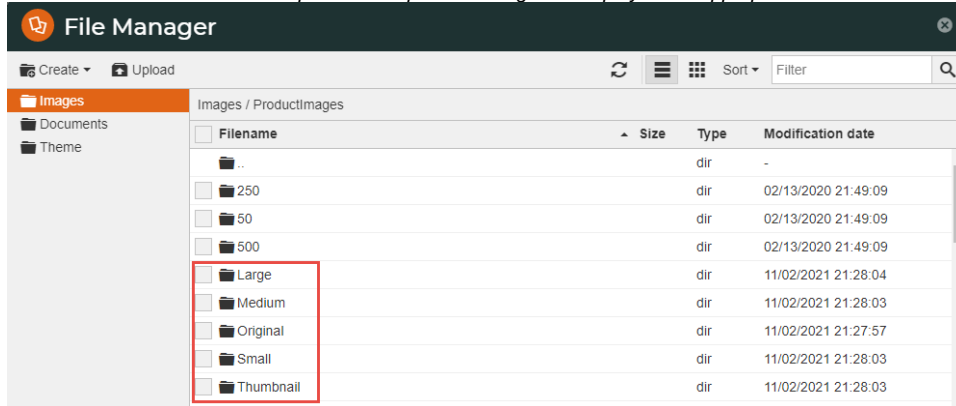
3. Once the images have finished uploading, click **Insert**.



4. Once you click **Insert**, the image thumbnails will display in the product's media list.



5. To enter relevant descriptions of your image, enter a value, then click **Add Tag**. You can add more than one tag.
6. Click **Save** or **Save and Exit**. Copies of the uploaded image will display in the appropriate folder.



Are image colours not as expected?

A: There are a number of factors that affect the rendering of colours for images on your website, e.g., different browsers.

One common issue relates to the colour mode set for the original image. You might have edited and saved the image in CMYK colour mode, which is typically used for print. During the CMS upload, the mode will be converted to RGB for online display. This process might result in the colour changes you're seeing. So when designing an image for your website, make sure the colour mode is set to RGB in the first place.

[Here is an article that may provide useful information.](#)

Adding Videos

Video links can also be added quickly and easily. Both YouTube and Vimeo formats are supported. To add a video, see: [Add Video to a Product Page](#).

[Add Video](#) [Upload Images](#)

Add Video Link

Video Type

YouTube

Description

Video ID (or full/shortened URL)

Add

Cancel

7. Documents

Document links for a product, e.g., size guides, product specifications or installation instructions, are added here. You can add a link to a document that is already uploaded to the CMS or upload it here. Add the [Product Documents widget](#) to the Product Detail page for document links to display on the Product Detail template.

To add a document link,

1. Click **Add Files**.
2. Select the document(s) and click **Insert**.



Bulk Link Documents

You can also bulk link multiple products to documents using the [Product Document Import](#) function.

8. Features

This is another name for metadata associated with the product. Feature details are user-defined so you can use them to specify certain product attributes. These can be filtered by shoppers to narrow down to the most suitable products when on a product list page. Features can also be shown in [Product Compare](#), and in a product's [Technical Specifications](#).

Product features and values are either **A)** integrated from your ERP Metadata module, or **B)** configured via the CMS in **Products & Categories** [Product Features](#).

If you're unsure which mode your site is using, [check with us](#).

Name	Value	Delete?
Brand	Endurance	
Material	<input type="text"/>	

[Add Feature](#)

9. Accessories (Cross-sell)

Enable Maintenance of Accessories must be ON in Product Maintenance settings.

Accessories are related products displayed to the shopper on a product's Product Details page. Accessories is called 'cross-sell' because suggestions include products that complement the viewed product.

To add an Accessory product, enter the product code or description in the input box. Select the product from the list and click the **Add Accessory** button.

To remove an Accessory, select the **Delete** option.

Repeat as required, then remember to **Save**.

+ Accessories
Product Accessories

⊖ Collapse Section

No Accessories Found

[Add Accessory](#)

Accessories are displayed on the Product Detail page using the [Cross Sell / Up Sell Widget](#).

10. Alternates (Up-sell)

Enable Maintenance of Alternates must be ON in Product Maintenance settings.

Alternates display suggested products similar to the viewed product on the Product Detail page. Alternates is called 'up-sell' since suggestions can include higher-profit or higher-value items.

To add an Alternate, enter the product code or description in the input box. Select the product from the list and click the **Add Alternate** button.

To remove an Alternate, select the **Delete** option.

Repeat as required, then remember to **Save**.

Alternates

Product Alternates

Collapse Section

No Alternates Found

Add Alternate

Alternates are displayed on the Product Detail page via the [Cross Sell / Up Sell Widget](#).

11. Master Product

The Product Variants feature must be enabled.

A Master product is a product that has variants (child products each with their own product codes). A shopper does not buy a Master product but one of its variants or child products.

To flag a product as a Master Product, toggle ON **'Is Master Product'**. Child products can then be added to the Master product. For more information, see: [Product Variants](#).

Master Product

Manage the Master / Child Product Relationship

Collapse Section

☒ Is Master Product



☐ Product Matrix Mode

Child Products

Product Search:

Clear

Variant

Variant Value

Variant

Variant Value

Add Variant

Add Child Product

Show Existing Child Product Attributes

12. Product Subscription

The Subscription Products feature must be enabled.

For more information, see: [Subscription Products](#).

13. Product Detail template widgets

Other functions that can be added to the Product Detail template:

- Let shopper download a PDF of the product detail page they are viewing - [Product PDF Download widget](#)

Related Resources

- [Add Product to Categories in Product Maintenance](#)
- [Add Product To Order Template Widget](#)
- [Add Video to a Product Page](#)
- [Alternate Product Substitution](#)
- [Assign Products in Category Maintenance](#)
- [Automatic Image Tagging for Variants](#)
- [Available Quantity Calculation](#)
- [Backordered Products & Ordering](#)

- [Bonus Items](#)
- [Check why a product is not appearing on your website](#)
- [Configurable kits](#)
- [Cross-selling and Upselling](#)
- [Custom Catalogues \(legacy\)](#)
- [Custom Filter Options for CMS Product Maintenance Search](#)
- [Enforce Pack Quantities](#)