

# Maintain Product Category in Category Maintenance

## Overview

If you maintain your product and category structure online rather than in the ERP, there are two ways you can add/edit products to categories:

1. [Product Maintenance](#) Maintain Product page for the product and add one or more categories, OR
2. Category Maintenance select the category and add *one or more* products to it.

(1) is most suitable for adding categories to one product and (2), for adding many products to a single category. This article outlines (2).

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## Before You Begin



### Prerequisite alert!

You'll need to:

1. 'Enable Maintenance of Product Categories' in [Product Maintenance](#) feature

#### Product Maintenance Feature Settings

Configure settings related to the Product Maintenance functionality

- ☐ Enable Note 1 Field
- ☐ Enable Note 2 Field
- ☐ Enable Note 3 Field
- ☐ Enable Note 4 Field
- ☐ Enable Note 5 Field
- ☐ Enable Maintenance of Postage and Handling
- ☒ Enable Maintenance of Ribbon Flag
- ☐ Enable Maintenance of Warranty
- ☒ Enable Maintenance of Product Categories

Integration Mode \*

Default

[settings](#)

2. Toggle OFF **Enable Integrated Category Maintenance** on the **Integrated Category Maintenance Settings** page.

#### Integrated Category Maintenance Settings

##### Feature Options

Configure settings related to the Integrated Category Maintenance feature



Enable Integrated Category Maintenance

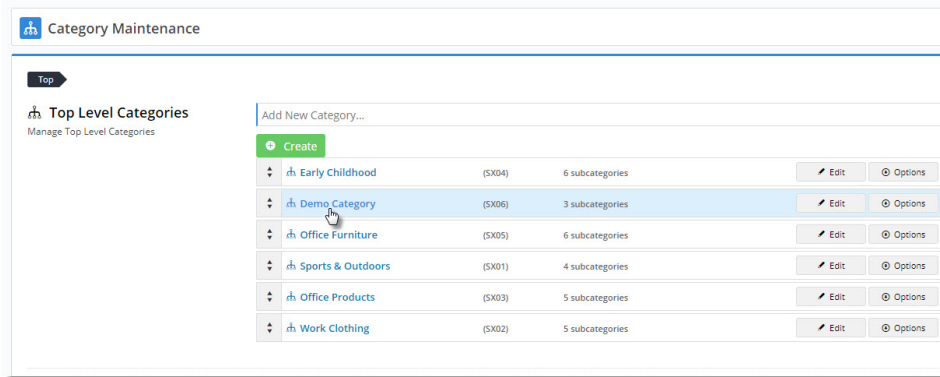
**NOTE** - You can also untick **Disable Product Category Integration** on the General settings page (**Settings Settings Settings**) ([zSettings.aspx](#)).

**Disable Product Category Integration :** ☒

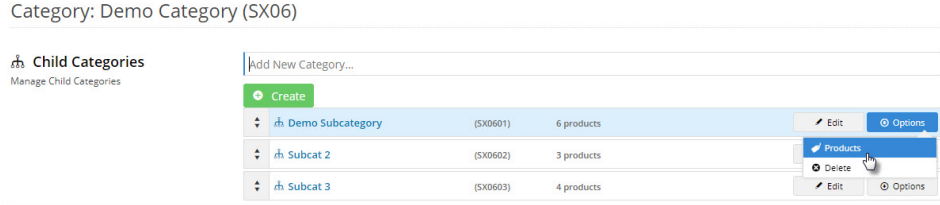
## Add Products to Category

1. In the CMS, go to **Products & Categories Category Maintenance**.

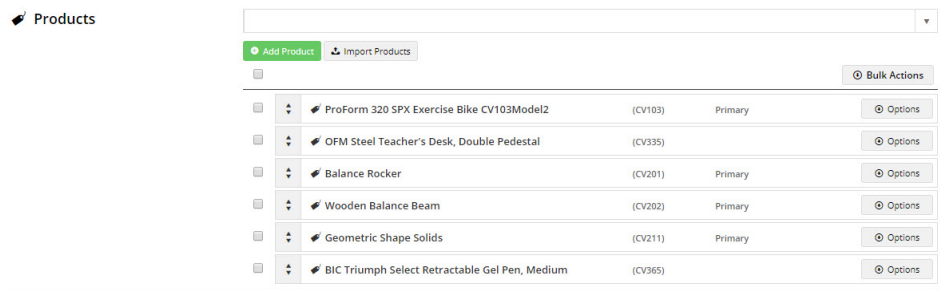
2. Click the top level category name to drill down to the category level you wish to add products to.



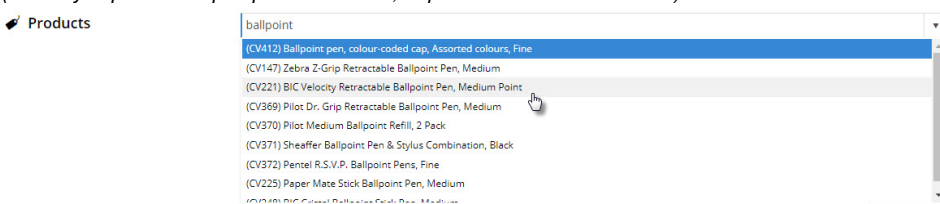
3. Hover on **Options** and select **Products** from the menu.  
Category: Demo Category (SX06)



4. The category's products will be displayed, with an indicator to show whether this category is the product's primary location (for SEO & breadcrumb purposes).



5. To add a product, start typing the code or description, then select it from the suggestions. Hit **Enter** or click '**Add Product**' to add it.  
(**TIP** - If you prefer to import products in bulk, skip ahead to the next section.)



6. (optional) Repeat Step 5 to add more products.  
7. Click **Save** or **Save and Exit**.

Here's an example:  
Your browser does not support the HTML5 video element

## Upload Products in Bulk

If you have a huge list of products to upload, you can use the import function.

Here's how:

5. Follow the steps above, but at step 5, click **Import Products**.

6. Click **'Download Example Template'** to generate a sample .csv file.

	A	B
1	Product Code	Primary
2	CV103	TRUE
3		
4		

7. Paste your own product data into the sheet.

- The product code is required.
- (Optional) In the **Primary** column, specify whether this category is the product's primary category (true/false or yes/no). If blank, 'false' defaults unless the product has no other category links. Use of primary category: the breadcrumb on the product detail page, related product SEO data will link to this category.


8. Save the .csv file somewhere.

9. Select your **Import Type**:

**Append** (default) - adds the products in your .csv to any products already in the category


**Overwrite** - deletes any products in the category and replaces them with the ones in your .csv

10. Click **Select files** to browse to your saved .csv. Once selected, the import will begin.

 **File Upload**  
Import Product Data


Import Type \*

Append


 Adds products on the import file to existing products in the category/categories.

Select files...

11. Check the import log to verify success or for errors. **NOTE** - Duplicate and invalid products will be skipped.


 **Category Product Import: Demo Subcategory (SX0601)**

[Download Example Template](#)

 **File Upload**  
Import Product Data


Import Type \*


Append

 Adds products on the import file to existing products in the category/categories.

Select files...


Done ✓

 category-products-import3-oneproduct.csv

 **Import Log**

Import Successful

Line 2: Warning: Product 'cv300' already had a Primary category of 'Gross Motor Skills' (SX0405) . Primary category is now 'Demo Subcategory' (SX0601)

 **Import Successful with Warnings**

Category Product information imported with warnings. Please see warnings in Import Log for more information

Close

11. Click **Back** to return to the category product list.

12. Click **Save** or **Save and Exit**.

Here's an example:

Your browser does not support the HTML5 video element

Once you've added products to a category, you'll need to clear the Product Cache for the products to show on your site. See: [Cache Management](#).

### Cache Management

#### Product Cache

Clears the product cache information, re-indexes lucene and resets the dictionary. This is a long running process.

Clear Cache

#### Dictionary Reset

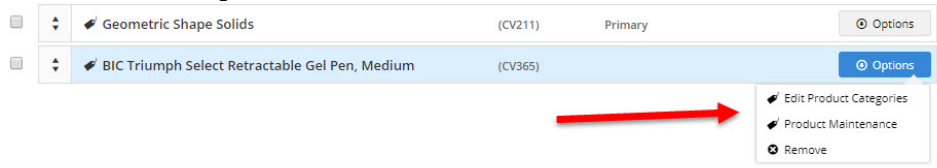
Resets the application dictionary

Clear Cache

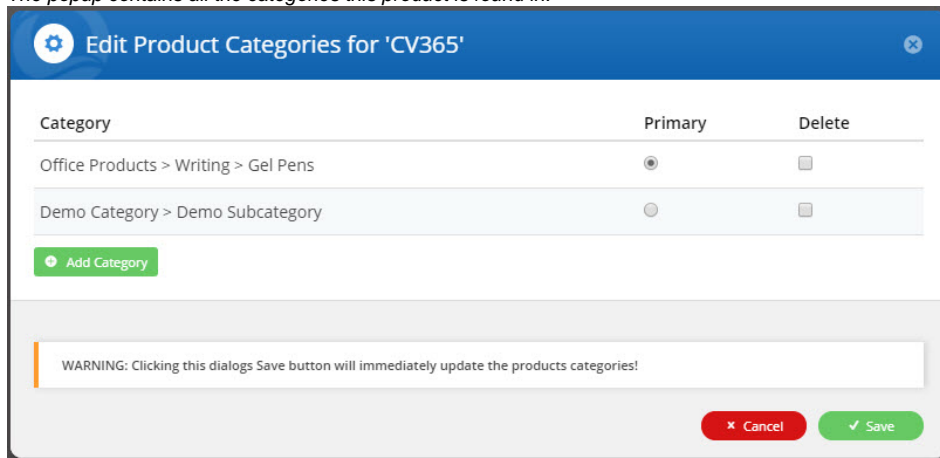
## Edit the Product's Primary Category

1. Hover over the **Options** button for a product. Or select multiple products.

2. Click **Edit Product Categories**.



3. The popup contains all the categories this product is found in.



4. Change the product's primary category assignment (radio buttons), or add/remove categories.

5. Click **Save**. **NOTE** - Changes will be saved regardless of whether you click Save on the Category Product page behind it.

## Go to Product Maintenance

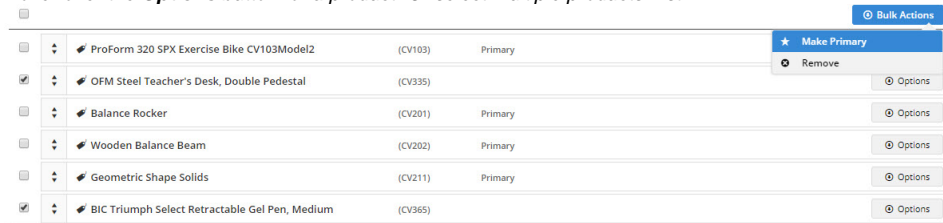
You can go directly to a product's Maintain Product page to edit product details.

While viewing a category's products:

1. Hover over the **Options** button for a product.
2. Select **Product Maintenance**. This opens the [Maintain Product](#) page for this product so that other information can be edited.

## Delete Products from a Category

1. Hover over the **Options** button for a product. Or select multiple products first.



2. Click **Remove**.

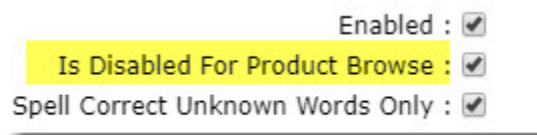
## Sort Product Order in Category

The order your products display in a category can also be edited. Just **drag and drop** the products into any sequence (or have them sequenced as required in your .csv file), and click **Save**.

**NOTE:** If your site uses [Lucene search](#), check the setting for Product Browse. When product browse (as well as search) is enabled, the product sequence you set in the CMS via drag & drop will be overridden.

To check your site's setting in the CMS:

1. Go to **Settings Advanced Settings Lucene Search Settings**.
2. Select the **Index Settings** tab.
3. Check the status of the **'Is Disabled For Product Browse'** tickbox and edit if required.



4. Click the **Update** button to save changes.

## Additional Information

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Minimum Version Requirements	** ** *
Prerequisites	

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<b>Self Configurable</b>	Yes
<b>Business Function</b>	Products & Categories
<b>BPD Only?</b>	Yes
<b>B2B/B2C/Both</b>	Both
<b>Third Party Costs</b>	n/a

## Related Resources

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