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).
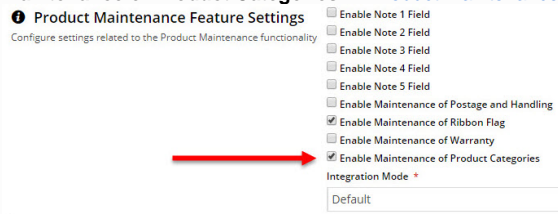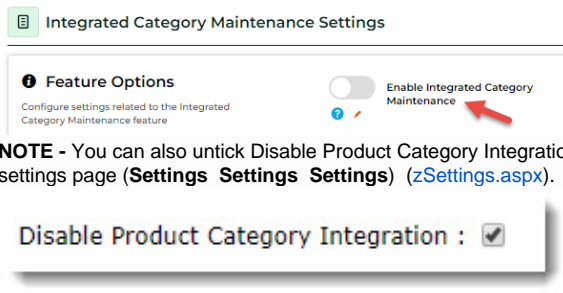
Before You Begin

Prerequisite alert!

You'll need to:

1. '**Enable Maintenance of Product Categories'** in Product Maintenance feature

   settings

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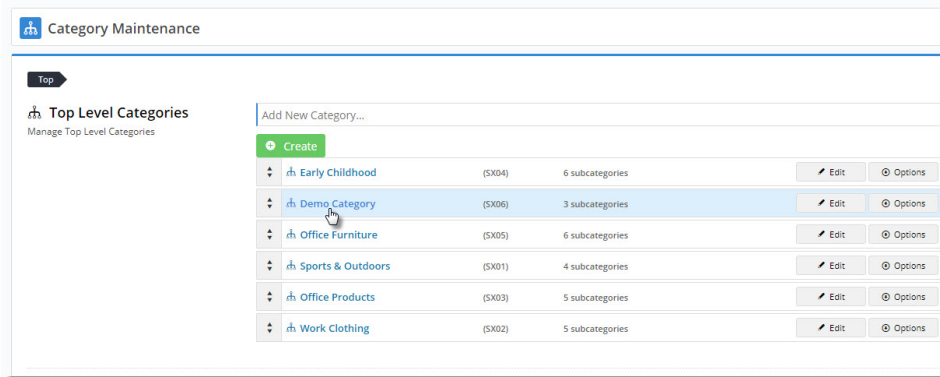

   NOTE - You can also untick Disable Product Category Integration on the General settings page (**Settings Settings Settings**) (zSettings.aspx).
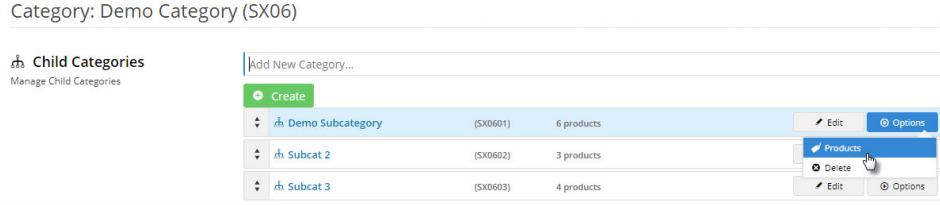

Add Products to Category

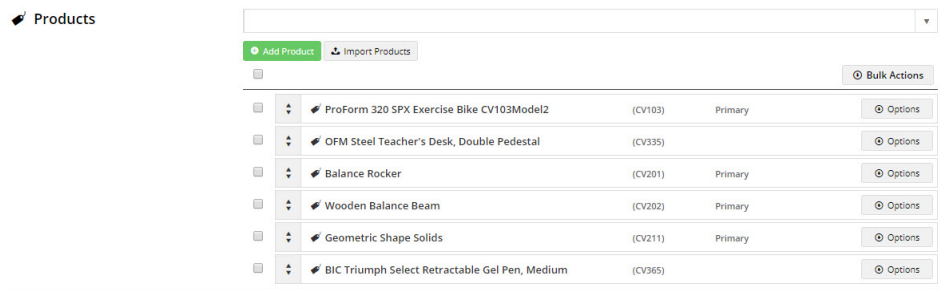1. *In the CMS, go to **Products & Categories Category Maintenance**.*

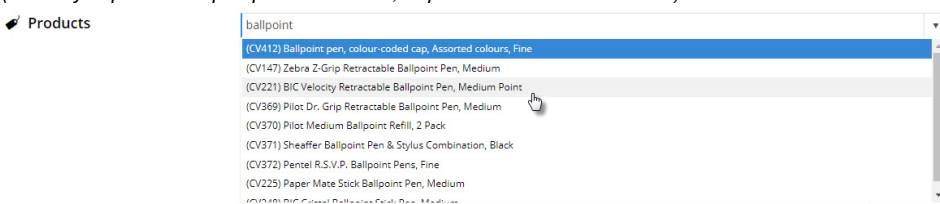2. *Click the top level category name to drill down to the category level you wish to add products to.*

3. *Hover on **Options** and select **Products** from the menu.*

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 tying 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)**

⚠ **Import Successful with Warnings**

Category Product information imported w
warnings.
Please see warnings in Import Log for mor
information

Close

📄 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)

*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 C |
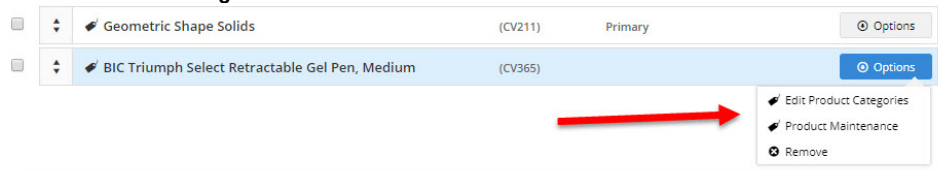> | **Dictionary Reset**
Resets the application dictionary | ⟳ Clear C |
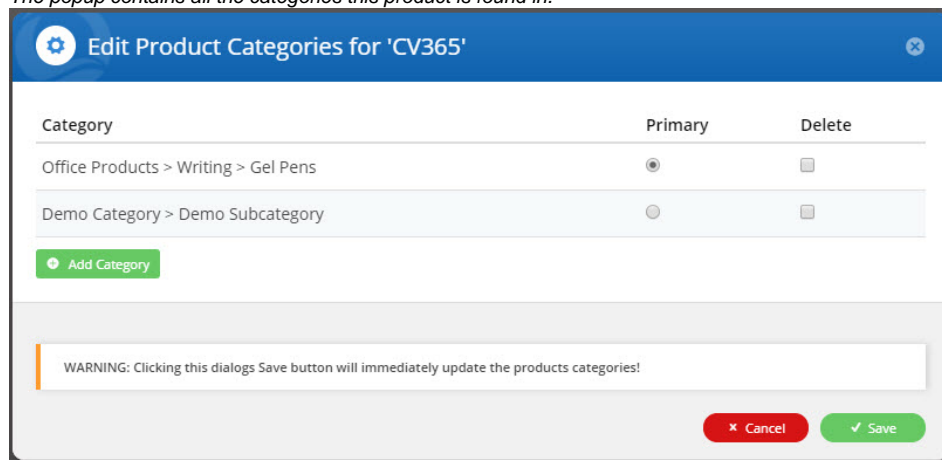
Edit the Product's Primary Category

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

2. *Click **Edit Product Categories**.*

☐	⬍	🏷 Geometric Shape Solids	(CV211)	Primary	⚙ Options
☐	⬍	🏷 BIC Triumph Select Retractable Gel Pen, Medium	(CV365)		⚙ Options

   🏷 Edit Product Categories
   🏷 Product Maintenance
   ⊗ Remove

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

   ### ⚙ Edit Product Categories for 'CV365'   ⊗

Category	Primary	Delete
Office Products > Writing > Gel Pens	⦿	☐
Demo Category > Demo Subcategory	○	☐

   ⊕ Add Category

   > WARNING: Clicking this dialogs Save button will immediately update the products categories!

   ✗ Cancel   ✓ Save

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.*
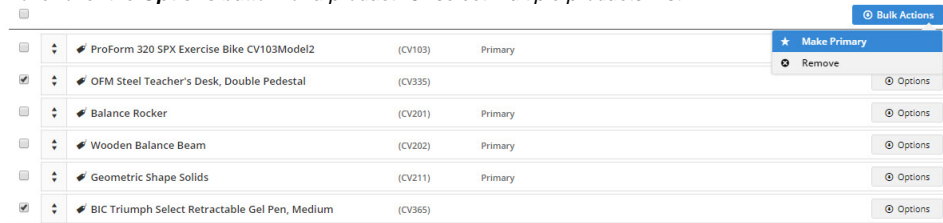
Go to Product Maintenance

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.
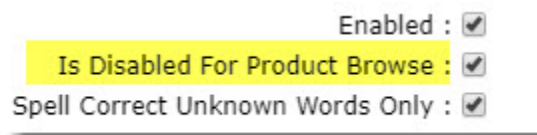

2. Click **Remove**.

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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Self Configurable	Yes
Business Function	Products & Categories
BPD Only?	Yes
B2B/B2C/Both	Both
Third Party Costs	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