



# USER GUIDE

## eCatalogs

Release 10.1-MP4 (April 20, 2021)

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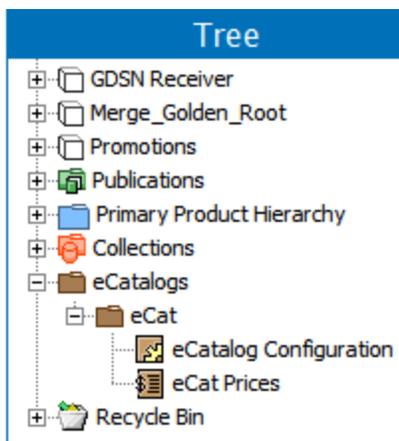
# eCatalogs

Electronic product catalogs, also known as eCatalogs, are data files in STEP that contain product and price information for a specific product selection, typically stored in a product collection.

## eCatalog Elements

An eCatalog object consists of three elements:

- A **collection** of the products go into the eCatalog. A collection can be either dynamic or static.
- A **price list**, which contains the prices that are valid for the eCatalog. A price list consists of product with its terms. A term for a product is a combination of a value and a set of conditions such as Minimum Quantity, Maximum Quantity, Start Date, and End Date.
- An eCatalog **configuration**, which specifies the output format, the delivery method, and the mapping between internal product attributes and the attributes of the export format.



## eCatalog Price Lists and Commercial Data Lists

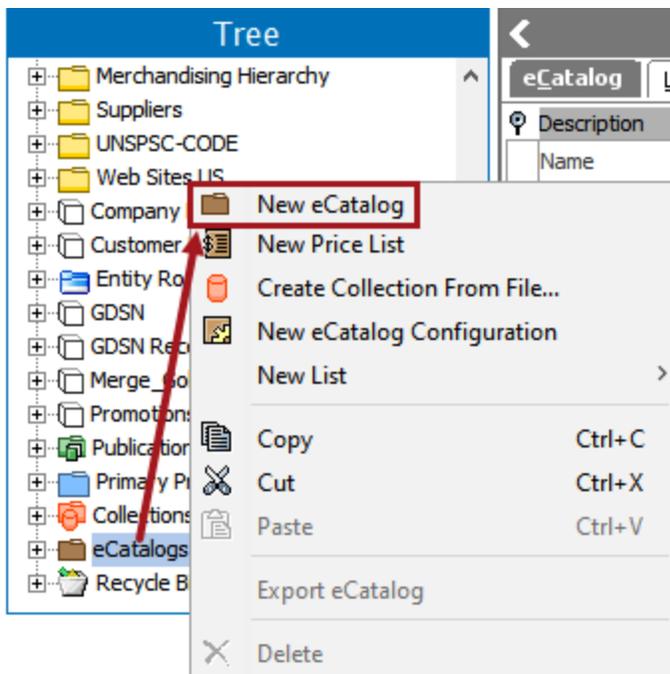
Price lists used in eCatalogs are identical in format to the price lists used for **commercial data** in STEP Publisher. They contain the same elements (Value, Unit, Quantity, Dates), use the same default System Setup commercial object type of Price (Price), and are mapped identically in the Import Manager. The difference between the two is in their intended output. eCatalog price lists are intended for electronic output, and commercial data lists are strictly used in STEP Publisher print publications.

Since eCatalog price list import configurations are mapped using commercial data options in the Import Manager, the term 'commercial data' is frequently used in this guide to refer to the contents of eCatalog price lists. For more information on commercial data, see the **Commercial Data** section of the **STEP Publisher (InDesign)** documentation.

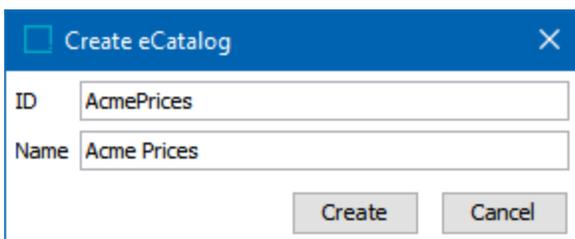
# Creating an eCatalog

To create a new eCatalog, follow these steps.

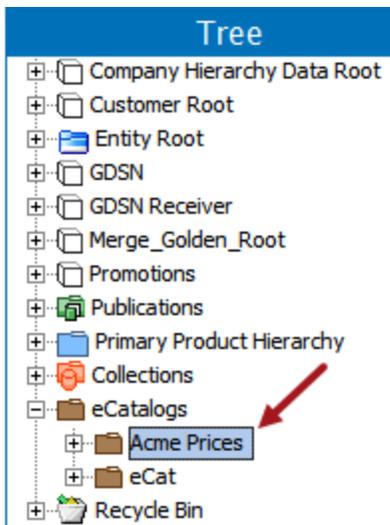
1. In the Tree, select **eCatalogs**.
2. Right-click and select **New eCatalog**.



3. In the Create eCatalog dialog, enter an **ID** and **Name** for the eCatalog, then click **Create**.



4. The eCatalog is created.



The next steps are to add the following elements to your eCatalog:

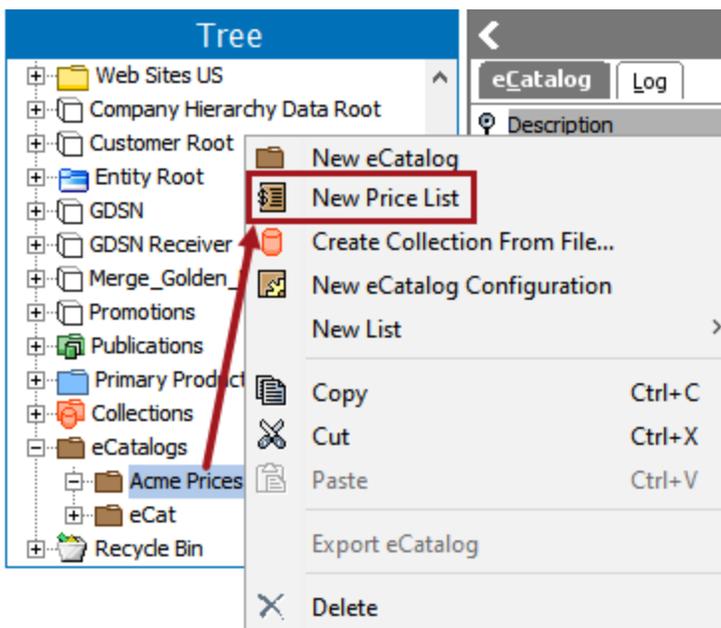
- A **price list** that contains the prices that are valid for the eCatalog.
- A **product collection** that contains a list of all the products that go into the eCatalog.
- An eCatalog **configuration** that specifies the output format, the delivery method, and the mapping between internal product attributes and the attributes of the export format.

# Creating a Price List

A price list consists of **terms**. A term for a product is a combination of a value (price) and a set of conditions such as Minimum Quantity, Maximum Quantity, Start Date, and End Date.

The first step when setting up your eCatalog is to create a **price list** that holds the prices of the eCatalog.

1. In the **Tree**, select the eCatalog that you want to create a price list for.
2. Right-click, and then click **New Price List**.



**Note:** The STEP object type used for eCatalog price lists, Price (Price), is the same default object type used for Commercial Data price lists. If you are also using Commercial Data in your system, any configurations made to the Price object type (e.g., setting an ID Pattern) will apply to eCatalog price lists. Additionally, the eCatalog price list cannot have the same ID as a Commercial Data list that uses the Price object type. For more information on Commercial Data, see the **Commercial Data** section of the **STEP Publisher (InDesign)** documentation.

3. In the **Create Price List** dialog, enter an **ID** and a **Name** for the price list, then click **Create**.



Unit' aspect of the terms list. See **Creating an eCatalog Configuration** for more information on creating import configurations.

- **Last modification time:** Displays the date and time that the list was last modified. This field is non-editable.
- **Expiry date:** Enter an expiration date for the list, or double-click the field to open the Date Picker.

**Note:** The price list will not expire automatically. The date is for administrative purposes only and is not the same as the 'End Date' value that can be defined for individual terms. See **Creating an eCatalog Configuration** for more information on the 'End Date' value.

- **Default Start-date** and **Default End-date:** Like Expiry date, these values are for administrative purposes only and are not the same as the 'Start Date' and 'End Date' values defined for individual terms.

# Defining Import Settings for Price Lists

eCatalog price list terms (commercial data) are imported into eCatalog price lists using standard **Import Manager** functionality.

After creating a price list object for your eCatalog, the next steps are to create a sample import file, in Excel or CSV format, then define the import settings for importing actual price data. The columns in the sample file will be used to map fields in the Import Manager wizard, which will allow the system to later ingest a sheet that contains actual data.

## Sample Excel Price List Load File

The following two screenshots show examples of price list import files, one containing price break and quantity information, and the other one containing price break, quantity, unit, start date, and end date information.

### Price Example

This example sheet is an Excel file that contains 10 columns and 8 products. Each product has three **prices** with price **breaks** that change based on the **quantity** of the product being sold.

For example, using the first product row shown in the below screenshot (ID = 121171), the price breaks are as follows:

Break No.	Quantity	Price
1	1 - 3	2.79
2	4 - 9	1.79
3	10 - 100	0.89

	A	B	C	D	E	F	G	H	I	J
1	<ID>	Price 1	P1min	P1max	Price 2	P2min	P2max	Price 3	P3min	P3max
2	121171	2.79	1	3	1.79	4	9	0.89	10	100
3	121177	2.99	1	3	2.49	4	9	0.99	10	100
4	121178	2.89	1	3	1.89	4	9	0.99	10	100
5	121179	3.99	1	3	2.79	4	9	0.79	10	100
6	121184	1.99	1	3	0.79	4	9	0.49	10	100
7	121192	17.76	1	3	9.76	4	9	5.76	10	100
8	121193	7.29	1	3	5.49	4	9	2.99	10	100
9	121190	9.99	1	3	5.99	4	9	2.99	10	100

**Note:** Even if you only wish to import a price file with three prices, you must set the Minimum and Maximum values (even if they are fake values) to each of the prices. You cannot just load three columns of prices and nothing else. So if you want to load three price breaks, you need to load nine columns of data. Unit, Start Date, and End Date are optional.

## Prices with Units and Dates

To also import **Unit**, **Start Date**, and **End Date** values, which are optional, a corresponding column for each value must also be present on the sheet. In the below example—which shows columns for 'Price1' only—there is a 'P1Unit,' 'P1StartDate,' and 'P1EndDate' column. Each subsequent price (Price2, Price 3, et al.) will also have its own unit, start date, and end date columns.

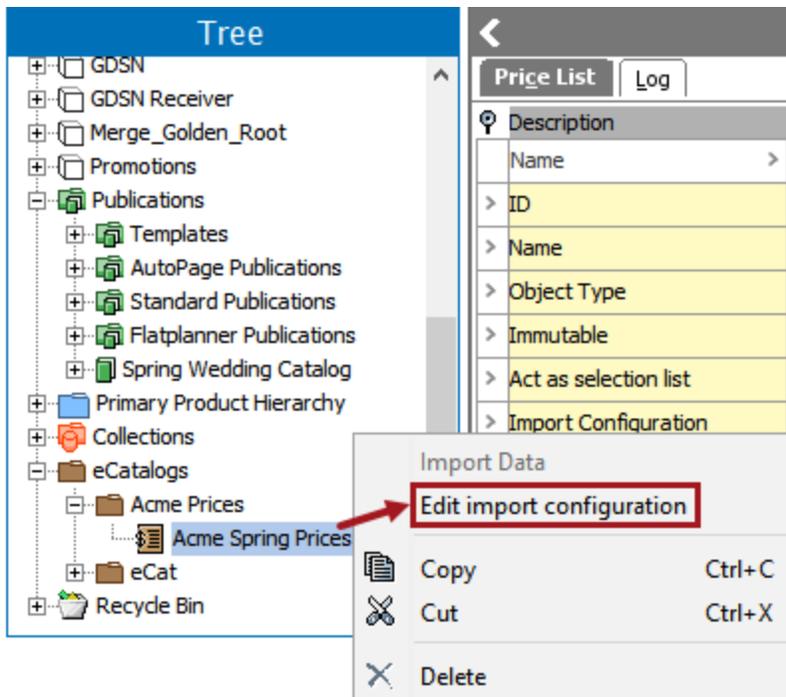
**Note:** When importing **units**, the **STEP ID** of the unit must be used and not the symbol. In the below example, iso4217.unit.USD is the STEP ID for U.S. dollar (\$).

	A	B	C	D	E	F	G
1	<ID>	Price1	P1Unit	P1min	P1max	P1StartDate	P1EndDate
2	121171	2.79	iso4217.unit.USD	1	3	9/1/2019	10/31/2019
3	121177	2.99	iso4217.unit.USD	1	3	9/1/2019	10/31/2019
4	121178	2.89	iso4217.unit.USD	1	3	9/1/2019	10/31/2019
5	121179	3.99	iso4217.unit.USD	1	3	9/1/2019	10/31/2019
6	121184	1.99	iso4217.unit.USD	1	3	9/1/2019	10/31/2019
7	121192	17.76	iso4217.unit.USD	1	3	9/1/2019	10/31/2019
8	121193	7.29	iso4217.unit.USD	1	3	9/1/2019	10/31/2019
9	121190	9.99	iso4217.unit.USD	1	3	9/1/2019	10/31/2019

## Creating an Import Configuration for a Price List

The following steps for creating a price list import configuration use a sheet that contains columns for all available price list (commercial terms) elements: value, unit, quantities, and dates. These steps assume that you have already created a sample file. Throughout the Import Manager, the elements within the price list (terms) are referred to as **commercial data**.

1. In the **Tree**, expand the relevant eCatalog.
2. Select and right-click the price list that you want to import prices to, and then click **Edit import configuration**.



3. The **Import Manager** displays on the **Select Data Source** screen.

**Note:** All steps of the Import Manager wizard, and the options available for each step, are described in detail in the **Creating a Data Import** section of the **Data Exchange** documentation. The information in this topic only contains detailed descriptions of the steps that are of particular importance to commercial data.

4. On this screen, select **File**. The data source will always be File for commercial data import configurations.
5. While still on the **Select Data Source** screen, click the ellipsis button (...) next to the **Filename** field and choose the sample upload file, then click **Next**.
6. On the **Select Format** screen, the format will be prepopulated with either Excel or CSV, depending on the format of your sample sheet.
7. Make any additional configurations ('Has Header,' 'Trim whitespace,' 'Use date and number formatting from sheet'), then click **Next**.

**Note:** It is strongly recommended to keep the default selection of **no** for **Use date and number formatting from sheet**, especially if importing date values. This ensures that date values are standardized into an ISO format. See the **Excel Format** section of the **Import Manager** documentation for more information.

Import Manager
✕

**Steps**

1. Select Configuration
2. Select Data Source
- 3. Select Format**
4. Map Data
5. Identify Objects
6. Identify Destination
7. Select Business Rules
8. Advanced Settings

**Select Format**

Format Excel

Converter for files in Microsoft Excel format that contain one object per row.

Has Header yes

Trim whitespace yes

Use date and number formatting from sheet no

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Conversion Preview:

<ID>	Price 1	P1Unit	P1min	P1max	P1StartDate	P1EndDate	Price2
121171	2.79	iso4217.unit...	1	3	2019-09-01	2019-10-31	1.79
121177	2.99	iso4217.unit...	1	3	2019-09-01	2019-10-31	2.49
121178	2.89	iso4217.unit...	1	3	2019-09-01	2019-10-31	1.89
121179	3.99	iso4217.unit...	1	3	2019-09-01	2019-10-31	2.79
121184	1.99	iso4217.unit...	1	3	2019-09-01	2019-10-31	0.79
121192	17.76	iso4217.unit...	1	3	2019-09-01	2019-10-31	9.76
121193	7.29	iso4217.unit...	1	3	2019-09-01	2019-10-31	5.49
121190	9.99	iso4217.unit...	1	3	2019-09-01	2019-10-31	5.99

Back
Next
Finish
Cancel

## Mapping Commercial Data in the 'Map Data' Step

In the **Map Data** step, a number of mappings must be specified manually. The 'Auto Map' feature will not work for commercial data mappings, though it can be used to map the ID or Name columns. **ID** is required.

1. To start the mappings, click a source column, then click **Map**. The **Map Column to** dialog displays.
2. Select the column to map, then click **Map**. The **Map to** dialog displays.
3. In this example, the first column has already been mapped to ID; the first price column, 'Price1,' has been selected; and the **Commercial Data** radio button has been selected in the **Map to** dialog.

**Import Manager**

**Steps**

- Select Configuration
- Select Data Source
- Select Format
- Map Data**
- Identify Objects
- Identify Destination
- Select Business Rules
- Advanced Settings

**Map Data**

Source:

<ID>	Price1	P1Unit	P1min	P1max	P1StartDa
121171	2.79	\$	1	3	9/1/19
121177	2.99				
121178	2.89				
121179	3.99				
121184	1.99				
121192	17.76				

Result:

ID=<ID> ✓
121171
121177
121178
121179
121184
121192

Buttons: Auto Map, Map

**Map Price1 to**

ID  
 Name  
 Attribute  
 **Commercial Data**  
 Product Classification Link  
 Product Reference  
 Asset Reference  
 Classification Reference  
 Entity Reference  
 Reference Meta-Data  
 Parent  
 Object Type  
 Variable  
 Multivalued Variable  
 Overrides product  
 Add child to override

**Value**  
 Unit  
 Min. Quantity  
 Max. Quantity  
 Start Date  
 End Date

Data set: Spring Prices (dropdown)  
 Group: 1 (dropdown)  
 Mandatory

Buttons: Cancel, OK

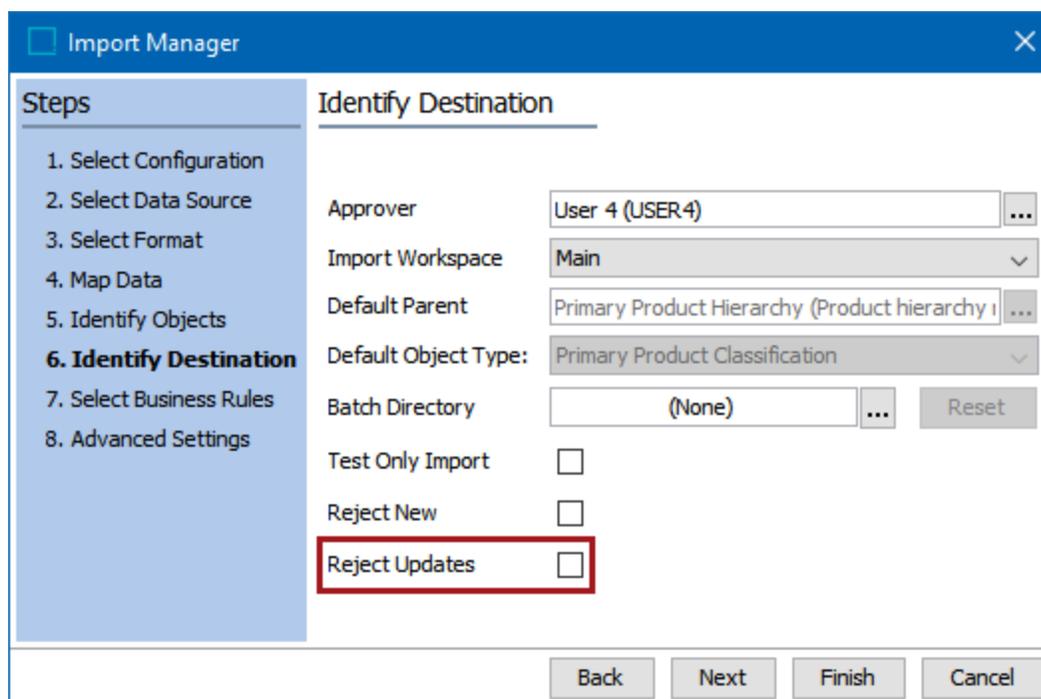
- The name of the price list will display in the **Data Set** field.
- From the **Group** list, select the preferred quantity break.
- Choose one of the following options to determine which field of the commercial list that the data from the Excel sheet should be mapped to:
  - Select **Value** to map the column to the value field.
  - Select **Unit** to map the column to the unit field and have the unit display along with the term value.
  - Select **Min. Quantity** to map the column to minimum quantity in the selected group or price break.
  - Select **Max. Quantity** to map the column to maximum quantity in the selected group or price break.

- Select **Start Date** to map the column to the start date when the price becomes valid.
  - Select **End Date** to map the column to the end date of the selected group or price break.
5. Check the **Mandatory** box if you want rows without a term value to be skipped on import so none of the information that may be related to a product without a specified term value will be imported. Click **OK**.
  6. Follow the previous steps until all columns of the sheet are mapped. For example, in this sheet, after mapping the 'Price1' column to Commercial Data > Group: 1 > **Value**, the remaining columns will be mapped as follows:
    - The 'P1min' column will be mapped to Commercial Data > Group: 1 > **Min. Quantity**
    - The 'P1max' column will be mapped to Commercial Data > Group: 1 > **Max Quantity**
    - The 'P1Unit' column will be mapped to Commercial Data > Group: 1 > **Unit**
    - The 'P1StartDate' column will be mapped to Commercial Data > Group: 1 > **Start Date**
    - The 'P1EndDate' column will be mapped to Commercial Data > Group: 1 > **End Date**
    - The 'Price2' column will be mapped to Commercial Data > Group: 2 > **Value**, and so forth.

The remainder of the columns will follow the same pattern. Click **Next** when finished.

## Completing the Import Configuration

1. On the **Identify Objects** screen, if the products in the source file are not identified as existing products in the system, the 'Match Result' will be 'New.' Click **Next**.
2. On the **Identify Destination** screen, several options are available, which are detailed at length in the **Import Manager - Identify Destination** topic in the **Import Manager** documentation. For the purposes of commercial data imports:
  - **Reject Updates** should be left unchecked, since a setting on the **Advanced Settings** screen of the wizard will control how commercial lists are updated.



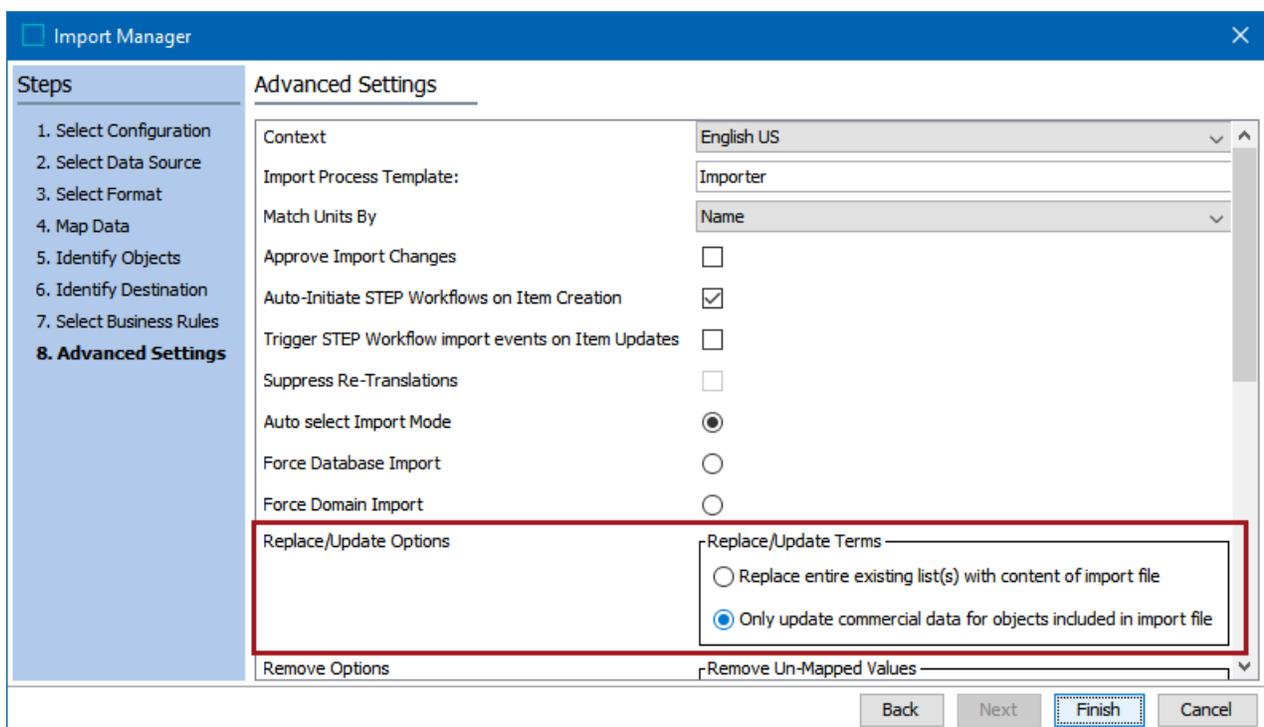
The screenshot shows the 'Import Manager' window with the 'Identify Destination' step selected. The 'Steps' list on the left includes: 1. Select Configuration, 2. Select Data Source, 3. Select Format, 4. Map Data, 5. Identify Objects, 6. Identify Destination (highlighted), 7. Select Business Rules, and 8. Advanced Settings. The main area contains the following fields and options:

- Approver: User 4 (USER4)
- Import Workspace: Main
- Default Parent: Primary Product Hierarchy (Product hierarchy)
- Default Object Type: Primary Product Classification
- Batch Directory: (None) with a 'Reset' button
- Test Only Import:
- Reject New:
- Reject Updates:  (highlighted with a red box)

At the bottom, there are buttons for 'Back', 'Next', 'Finish', and 'Cancel'.

3. On the **Select Business Rules** screen, business rules can be specified to run upon import if required for your business needs. For more details, see the **Import Manager - Select Business Rules** topic in the **Import Manager** documentation. Click **Next**.
4. On the **Advanced Settings** screen, any options can be selected based on your business needs, but the only options relevant to commercial data appear in the **Replace/Update Options** area.
  - To delete all existing content of the commercial list(s) and replace it with the content of the new file, select **Replace entire existing list(s) with content of import file**.
  - To keep the existing content of the commercial list(s) and only replace the commercial data of the product IDs included in the new file, select **Only update commercial data for objects included in import file**.

For more information on all options available on the **Advanced Settings** screen, see the **Import Manager - Advanced Settings** topic in the **Data Exchange** documentation.



The screenshot shows the 'Import Manager' window with the 'Advanced Settings' tab selected. On the left, a 'Steps' sidebar lists eight steps, with '8. Advanced Settings' highlighted. The main area contains various settings:
 

- Context: English US
- Import Process Template: Importer
- Match Units By: Name
- Approve Import Changes:
- Auto-Initiate STEP Workflows on Item Creation:
- Trigger STEP Workflow import events on Item Updates:
- Suppress Re-Translations:
- Auto select Import Mode:
- Force Database Import:
- Force Domain Import:

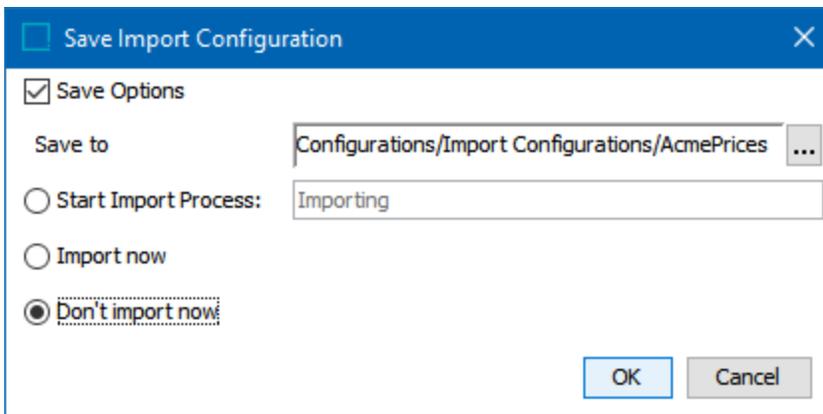
 A red box highlights the 'Replace/Update Options' section, which contains:
 

- Replace/Update Terms:
  - Replace entire existing list(s) with content of import file
  - Only update commercial data for objects included in import file

 At the bottom, there are 'Remove Options' and 'Remove Un-Mapped Values' dropdowns, and 'Back', 'Next', 'Finish', and 'Cancel' buttons. The 'Finish' button is highlighted with a dashed border.

5. Click **Finish** to complete the wizard. The **Save Import Configuration** dialog displays. It is recommended to save the import configuration and check 'Don't import now' in case changes need to be made to the configuration before importing live data. Click **OK**.

See the **Running a Data Import** topic in the **Data Exchange** documentation for information on how to save the import configuration.

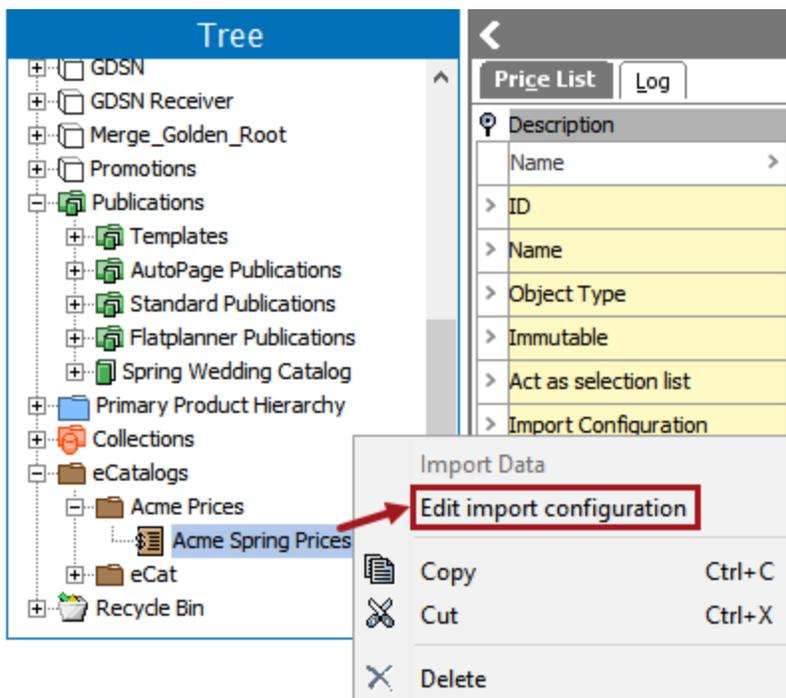


6. The price list import configuration is saved in the specified classification structure as an XML file of the object type Import Manager Configuration (stibo.ImportManagerConfig).
7. A price list can now be imported. See the next section of this topic, **Importing Prices**, for details.

## Editing a Saved eCatalog Import Configuration

To make changes to an existing eCatalog import configuration, do the following.

1. Right-click on the price list and select **Edit import configuration**.



2. The Import Manager wizard displays, starting on the **Select Data Source** screen.
3. Make the desired edits following the same steps listed above for creating a new configuration.

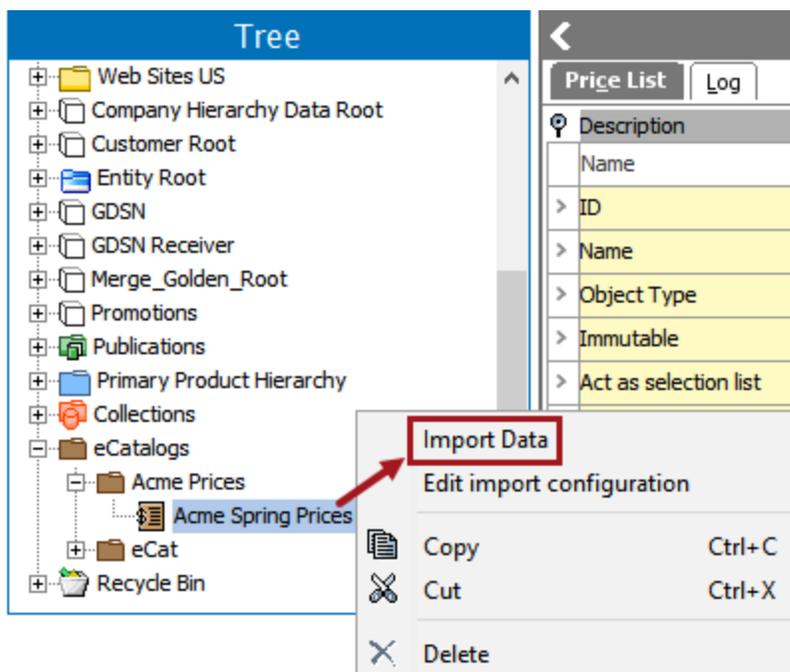
4. Alternatively, you can edit the configuration by right-clicking on the saved import configuration object in the classification hierarchy. See the **Maintaining a Saved Import Configuration** topic in the **Data Exchange** documentation for details.

# Importing Prices

eCatalog price lists are imported using standard Import Manager functionality. In STEP Workbench, these imports can be initiated from STEP Workbench menu (i.e., File > Import > Data) or from the price list object itself. This topic explains how to import commercial data information for eCatalog price lists through a right-click action on the price list object.

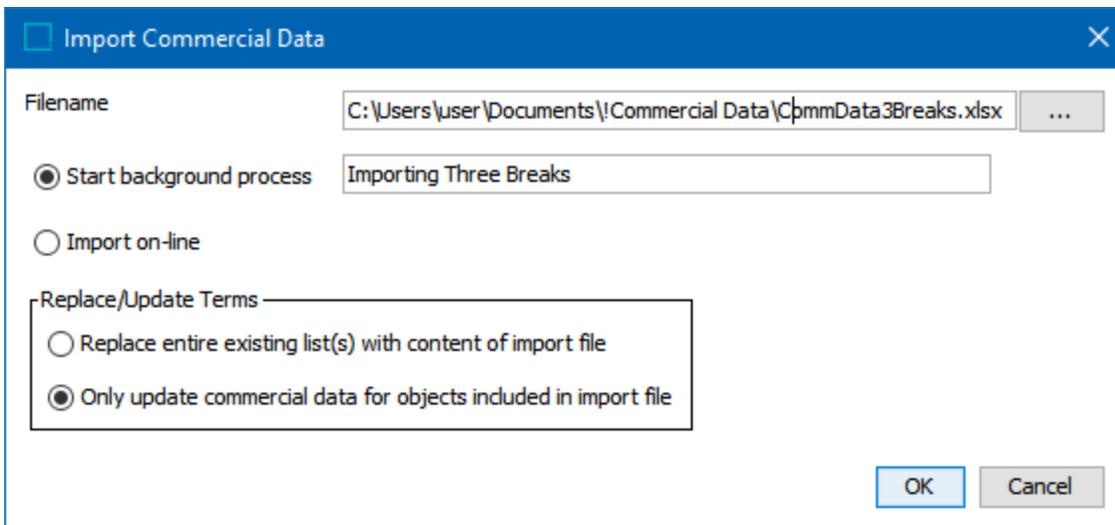
To import eCatalog price information:

1. Right-click on the price list object and select **Import Data**.



2. In the **Import Commercial Data** dialog, click the ellipsis button (...) next to **Filename**, then navigate to and select the file you want to import.

**Note:** This file must match the format of the file saved in the import configuration.



3. In the **Replace/Update Terms** area, select one of the following options:

- To delete all existing content of the commercial list(s) and replace it with the content of the new file, select **Replace entire existing list(s) with content of import file**.
- To keep the existing content of the commercial list(s) and only replace the commercial data of the product IDs included in the new file, select **Only update commercial data for objects included in import file**.

The choice you made when defining the import configuration on the Advanced Settings screen of the Import Manager wizard will be set as default, but you can override this option by selecting the other option.

**Note:** If **Immutable** has been checked on the price list object, values cannot be updated regardless of what option is chosen. See **Creating a Price List** for more information.

4. Select **Import on-line** option if you want the process to run and show the result online instead of going to a background process. Once the process completes, the Import Report window will show the complete report.
5. Click **OK**.

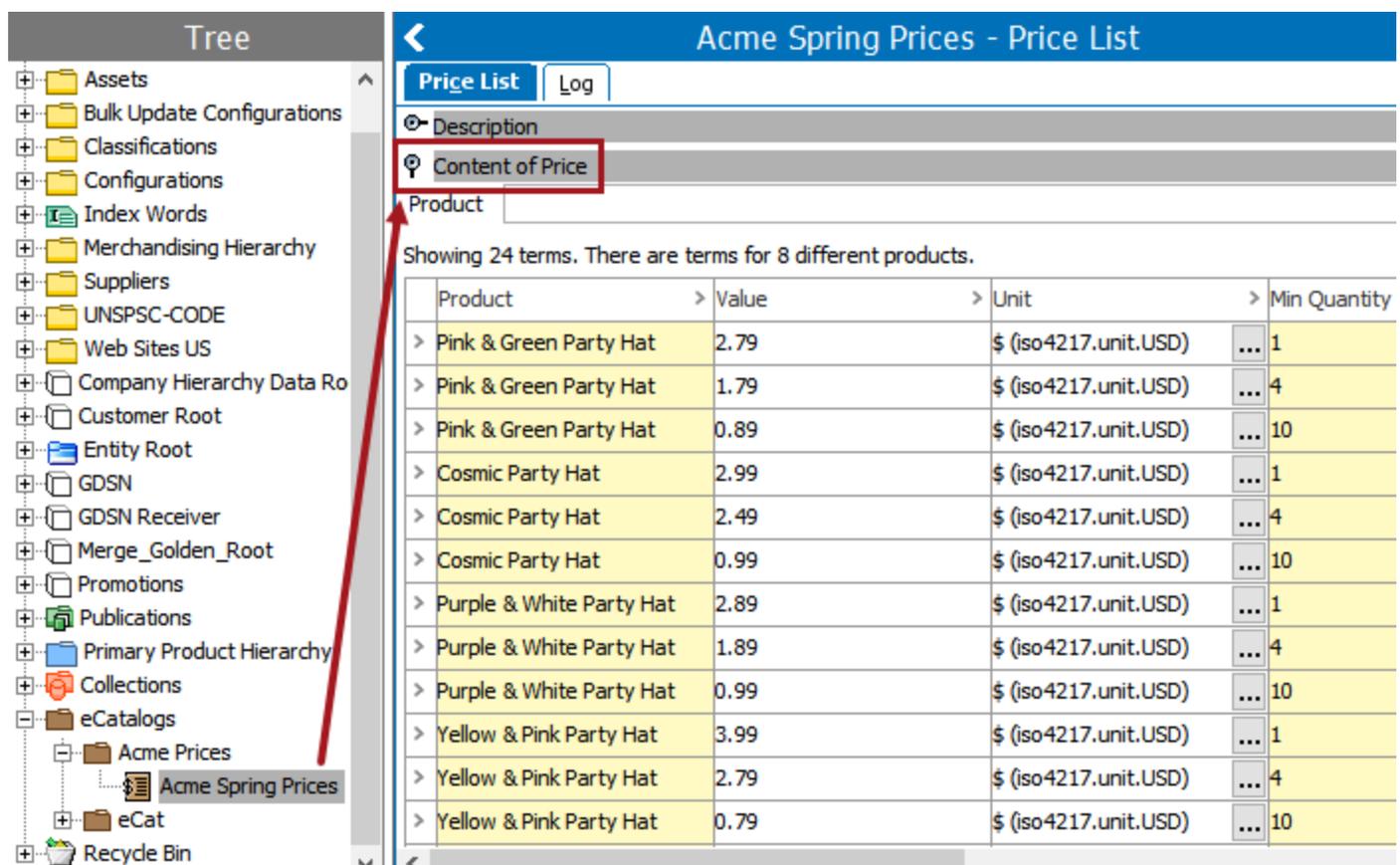
To **view** the imported data, use one of the methods outlined in the **Viewing Price Lists** topic.

# Viewing and Searching Price Lists

After importing a price list, the commercial data terms can be viewed both from the **price list** and from the **product** that is included in the list. Additionally, the data can be searched when viewing it from the product.

## View Terms from a Price List

1. Navigate to and select the relevant price list in your eCatalog.
2. On the Price List tab, expand the **Content of area**.
3. The contents of the price list are displayed.



The screenshot shows the 'Acme Spring Prices - Price List' interface. On the left, a 'Tree' view shows the navigation structure, with 'Acme Spring Prices' selected under 'eCatalogs'. The main view has a 'Price List' tab and a 'Log' button. Below this, the 'Content of Price' section is expanded, showing a 'Product' field. A table below displays 24 terms for 8 different products. A red arrow points from the 'Acme Spring Prices' item in the tree to the 'Content of Price' section.

Product	Value	Unit	Min Quantity
> Pink & Green Party Hat	2.79	\$ (iso4217.unit.USD)	1
> Pink & Green Party Hat	1.79	\$ (iso4217.unit.USD)	4
> Pink & Green Party Hat	0.89	\$ (iso4217.unit.USD)	10
> Cosmic Party Hat	2.99	\$ (iso4217.unit.USD)	1
> Cosmic Party Hat	2.49	\$ (iso4217.unit.USD)	4
> Cosmic Party Hat	0.99	\$ (iso4217.unit.USD)	10
> Purple & White Party Hat	2.89	\$ (iso4217.unit.USD)	1
> Purple & White Party Hat	1.89	\$ (iso4217.unit.USD)	4
> Purple & White Party Hat	0.99	\$ (iso4217.unit.USD)	10
> Yellow & Pink Party Hat	3.99	\$ (iso4217.unit.USD)	1
> Yellow & Pink Party Hat	2.79	\$ (iso4217.unit.USD)	4
> Yellow & Pink Party Hat	0.79	\$ (iso4217.unit.USD)	10

## Search Terms from a Price list

1. Navigate to and select the relevant price list in your eCatalog.
2. Select the relevant commercial list, then click the **Price List** tab.
3. Expand the **Content of** area to view the content of the list.

- In the **Product** field, enter a product name or ID, or use an asterisk to enter part of a name or ID, and then click **Search**.

**Price List**

☞ Description

☞ Content of Price

Product

Showing 24 terms. There are terms for 8 different products.

Product >	Value >	Unit >	Min Quantity >	Max Quantity >	Start Date
> Pink & Green Party Hat	2.79	\$ (iso4217.unit.USD) ...	1	3	2019-09-01 00:00:00
> Pink & Green Party Hat	1.79	\$ (iso4217.unit.USD) ...	4	9	2019-09-01 00:00:00
> Pink & Green Party Hat	0.89	\$ (iso4217.unit.USD) ...	10	100	2019-09-01 00:00:00
> Cosmic Party Hat	2.99	\$ (iso4217.unit.USD) ...	1	3	2019-09-01 00:00:00
> Cosmic Party Hat	2.49	\$ (iso4217.unit.USD) ...	4	9	2019-09-01 00:00:00
> Cosmic Party Hat	0.99	\$ (iso4217.unit.USD) ...	10	100	2019-09-01 00:00:00
> Purple & White Party Hat	2.89	\$ (iso4217.unit.USD) ...	1	3	2019-09-01 00:00:00
> Purple & White Party Hat	1.89	\$ (iso4217.unit.USD) ...	4	9	2019-09-01 00:00:00
> Purple & White Party Hat	0.99	\$ (iso4217.unit.USD) ...	10	100	2019-09-01 00:00:00
> Yellow & Pink Party Hat	3.99	\$ (iso4217.unit.USD) ...	1	3	2019-09-01 00:00:00
> Yellow & Pink Party Hat	2.79	\$ (iso4217.unit.USD) ...	4	9	2019-09-01 00:00:00
> Yellow & Pink Party Hat	0.79	\$ (iso4217.unit.USD) ...	10	100	2019-09-01 00:00:00
> Christmas Party Hat	1.99	\$ (iso4217.unit.USD) ...	1	3	2019-09-01 00:00:00

- The search results are displayed.

**Price List**

☞ Description

☞ Content of Price

Product

Search result showing 6 terms. There are terms for 2 different products.

Product >	Value >	Unit >	Min Quantity >	Max Quantit
> Pink & Green Party Hat	2.79	\$ (iso4217.unit.USD) ...	1	3
> Pink & Green Party Hat	1.79	\$ (iso4217.unit.USD) ...	4	9
> Pink & Green Party Hat	0.89	\$ (iso4217.unit.USD) ...	10	100
> Pink & Green Pom-Pom Hat	7.29	\$ (iso4217.unit.USD) ...	1	3
> Pink & Green Pom-Pom Hat	5.49	\$ (iso4217.unit.USD) ...	4	9
> Pink & Green Pom-Pom Hat	2.99	\$ (iso4217.unit.USD) ...	10	100

> [Add Product](#)

- To show the entire content of the list again, leave the search field blank, then click **Search**.

## View Terms from a Product

1. In the **Tree**, navigate to and select the relevant product.
2. On the Commercial tab, expand the **Terms** area.
3. All price lists that the product appears in are displayed. Any STEP Publisher commercial data lists that the product is linked to will also display. For more information on commercial data, see the **Commercial Data** section of the **STEP Publisher (InDesign)** documentation.

Terms List ID	Terms List Name	Terms List Type	Owner	Owner Versions	Value
> SpringPrices	Spring Prices	Price	Spring Wedding Catalog	English US	2.79
> SpringPrices	Spring Prices	Price	Spring Wedding Catalog	English US	1.79
> SpringPrices	Spring Prices	Price	Spring Wedding Catalog	English US	0.89
> eCatPrices	eCat Prices	Price	eCat		3.15
> eCatPrices	eCat Prices	Price	eCat		2.99
> FrenchPrices	French Prices	Price	Acme Party Supplies	French FR	3,99
> SummerPrices	Summer Prices	Price	Summer Wedding Catalog		2.79
> SummerPrices	Summer Prices	Price	Summer Wedding Catalog		1.79
> SummerPrices	Summer Prices	Price	Summer Wedding Catalog		0.89
> AcmeSpringPrices	Acme Spring Prices	Price	Acme Prices		2.79
> AcmeSpringPrices	Acme Spring Prices	Price	Acme Prices		1.79
> AcmeSpringPrices	Acme Spring Prices	Price	Acme Prices		0.89

It is also possible to **edit** terms lists from both locations. See the next topic in this section, Editing Price Lists, for more information.

# Editing Price Lists

After being imported, eCatalog price list terms can be edited, either from a **price list** or from a **product**.

**Note:** Price lists cannot be edited if the **Immutable** box has been checked on the price list object. See the **Creating a Price List** topic for more information.

## Edit Price List Terms from a Price List

There are two ways to edit price list terms from a price list. The **Value** and **Unit** can be edited *directly* from the list. The **Value**, **Min Quantity**, **Max Quantity**, **Start Date**, and **End Date** values can be edited by right-clicking on a product in the list and accessing the **Edit Terms** dialog.

### Editing Terms Directly

1. Navigate to and select the relevant **price list**, then click on the **Price List** tab.
2. Expand the **Content of** section to view the content of the list.
3. Double-click in any **Value** field to edit the value.
4. Click the ellipsis button (...) in the **Unit** field to edit the unit.

### Editing Terms from the Edit Terms Dialog

1. Navigate to and select the relevant **price list**, then click on the **Price List** tab.
2. Expand the **Content of** section to view the content of the list.
3. Right-click the right arrow next to the preferred term, then choose **Edit Term**.

Price List Log

Description

Content of Price

Product

Showing 24 terms. There are terms for 8 different products.

Product	Value	Unit
> Pink & Green Party Hat	2.79	\$ (iso4217.un
> Pink & Green Party Hat	1.79	\$ (iso4217.un
> Pink & Green Party Hat	0.89	\$ (iso4217.un
>		\$ (iso4217.un

Context menu for the selected row:

- Hide
- Show All Columns
- Rotate Table
- Add Product Ctrl+Plus
- Remove Product Ctrl+Minus
- Edit Term**

- In the **Edit Terms** dialog, double-click inside the field for the term that you want to edit, then click **OK** when complete.

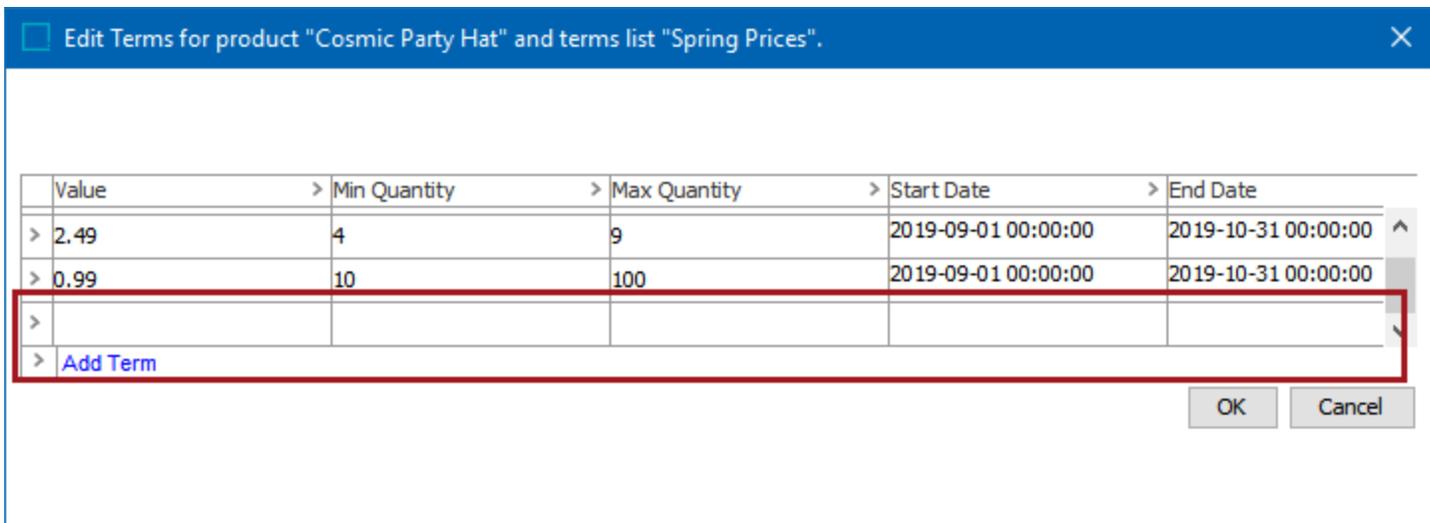
Edit Terms for product "Pink & Green Party Hat" and terms list "Spring Prices".

Value	Min Quantity	Max Quantity	Start Date	End Date
> 2.79	1	3	2019-09-01 00:00:00	2019-10-31 00:00:00
> 1.79	4	9	2019-09-01 00:00:00	2019-10-31 00:00:00
> 0.89	10	100	2019-09-01 00:00:00	2019-10-31 00:00:00
> <a href="#">Add Term</a>				

OK Cancel

### Add Terms to a Price List

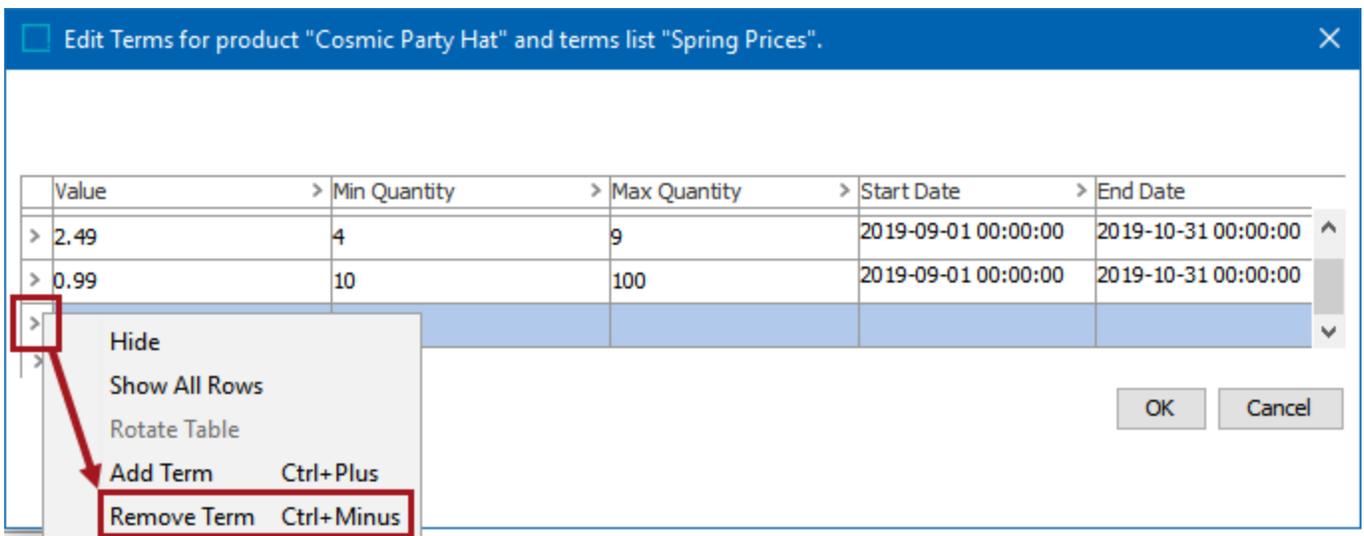
- Follow the steps outlined above to access the **Edit Terms** dialog.
- Click **Add Term** to add a new row to the Edit Terms dialog.



3. Enter the relevant term values in the new row, then click **OK**.

### Remove Terms from a Price List

1. Follow the steps outlined above to access the **Edit Terms** dialog.
2. In the **Edit Terms** dialog, right-click the arrow next to the term you want to remove, then choose **Remove Term**.



### Add Products to a Price List

Instead of importing products into a price list, you can add products manually, for which you then can edit the terms.

1. Navigate to and select the relevant **price list**, then click on the **Price List** tab.
2. Expand the **Content of** section to view the content of the list.

- Right-click the menu icon (arrow) next to one of the terms in the table, and then click **Add Product**. Alternatively, scroll to the bottom of the table-based view, then click **Add Product**.

**Price List** Log

☰ Description

🔍 Content of Price

Product

Showing 24 terms. There are terms for 8 different products.

Product	Value	Unit
> Pink & Green Party Hat	2.79	\$ (iso4217.un
> Pink & Green Party Hat	1.79	\$ (iso4217.un
> Pink & Green Party Hat	0.89	\$ (iso4217.un
>		\$ (iso4217.un

Hide

Show All Columns

Rotate Table

**Add Product Ctrl+Plus**

Remove Product Ctrl+Minus

Edit Term

- In the **Add Product to Terms List** dialog, click the ellipsis button (...).

**Add Product to Terms List** ✕

**Steps**

- Select Product**
- Enter Terms

**Select Product**

Select Product To Add To The Terms List

...

Back
Next
Finish
Cancel

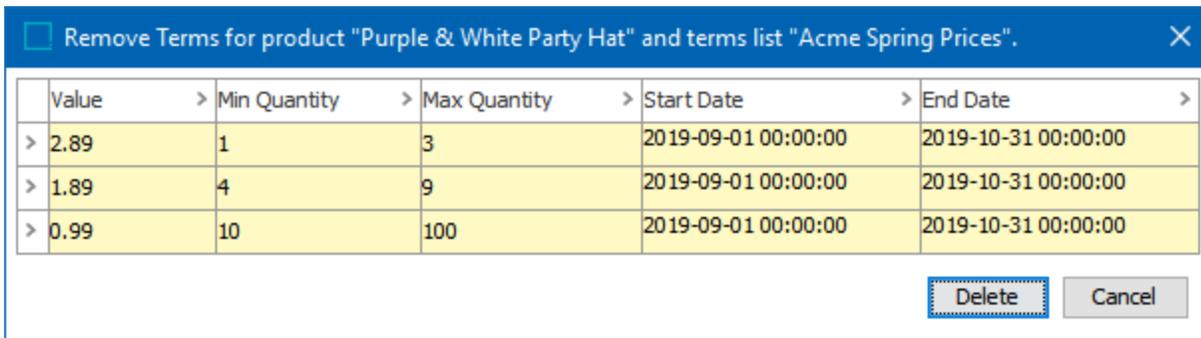
- Browse to or search for the relevant product on the **Select Product** dialog, then click **Select**. Only one product can be selected; an option to multi-select products is not available.
- After selecting the product, click **Next** on the **Add Product to Terms** list dialog.
- In the **Add Product to Terms** List dialog, click **Add Term** to add a new blank row to the dialog.
- Enter the relevant terms, then click **Add Term** again to add more terms.

**Note:** No option is available in this dialog to add a Unit. It must be added after the product is added to the list.

9. Click **Finish**. The product is now available in the list.

## Remove Products from a Price List

1. Follow the same initial steps as above for adding a product, but click **Remove Product** instead of Add Product.
2. The **Remove Terms for** dialog displays, showing all the terms that will be affected.
3. Click **Delete** to remove the product from the list.



	Value	Min Quantity	Max Quantity	Start Date	End Date
>	2.89	1	3	2019-09-01 00:00:00	2019-10-31 00:00:00
>	1.89	4	9	2019-09-01 00:00:00	2019-10-31 00:00:00
>	0.99	10	100	2019-09-01 00:00:00	2019-10-31 00:00:00

4. Click the ellipsis button (...), then either browse or search for a Product, and then click **Next**.
5. Click **Add Term** and fill in the relevant fields.
6. Click **Finish**.

## Edit Price List Terms from a Product

Price lists can also be edited from product objects that appear in at least one price list. When viewing terms lists for a product on the **Commercial** tab, the Value and Unit can be edited directly. The Value, Min Quantity, Max Quantity, Start Date, and End Date values can be edited by right-clicking on a **terms list** and accessing the **Edit Terms** dialog.

### Editing Price Commercial Data Directly

1. In the **Tree**, navigate to and select the relevant product.
2. On the **Commercial** tab, expand the **Terms** area. The content of the lists related to the product is displayed.
3. Double-click in any **Value** field to edit the value.
4. Click the ellipsis button (...) in the **Unit** field to edit the unit.

### Editing Commercial Data from the Edit Terms Dialog

1. In the **Tree**, navigate to and select the relevant product.
2. On the **Commercial** tab, expand the **Terms** area. The content of the lists related to the product is displayed.
3. Right-click the right arrow next to the relevant term, then choose **Edit Term**.

Commercial			Tables	Category Profile	Proof View	Classification R
Product	Data Containers		Sub Products		Re	
Terms						
Terms List ID	>	Terms List Name	>	Terms List Type		
>	SpringPrices	Spring Prices	>	Price		
>	SpringPrices	Spring Prices	>	Price		
>	SpringPrices	Spring Prices	>	Price		
>			>	Sales Prices		
>			>	Winter Retail Price		
>			>	Due		
>			>	Cover Design Due		
>			>	Price		
>			>	Price		
>			>	Clearance Prices		
>			>	Price		
>	Spring_Prices	Spring Prices	>	Price		

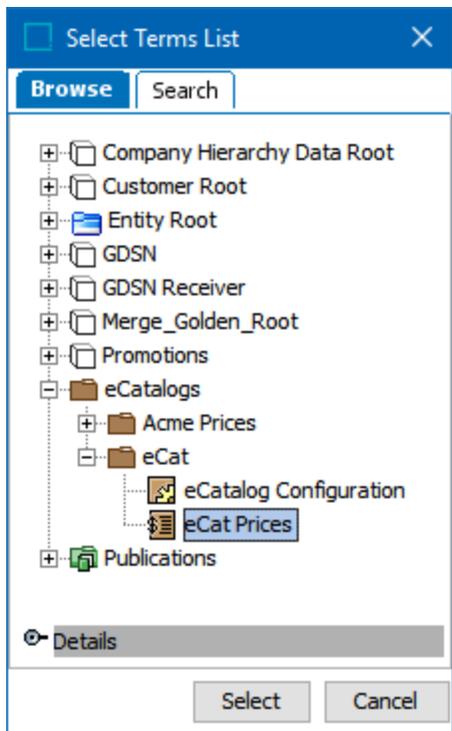
- In the **Edit Terms** dialog, double-click inside the field for the term that you want to edit, then click **OK** when complete.

### Add Terms to a Product

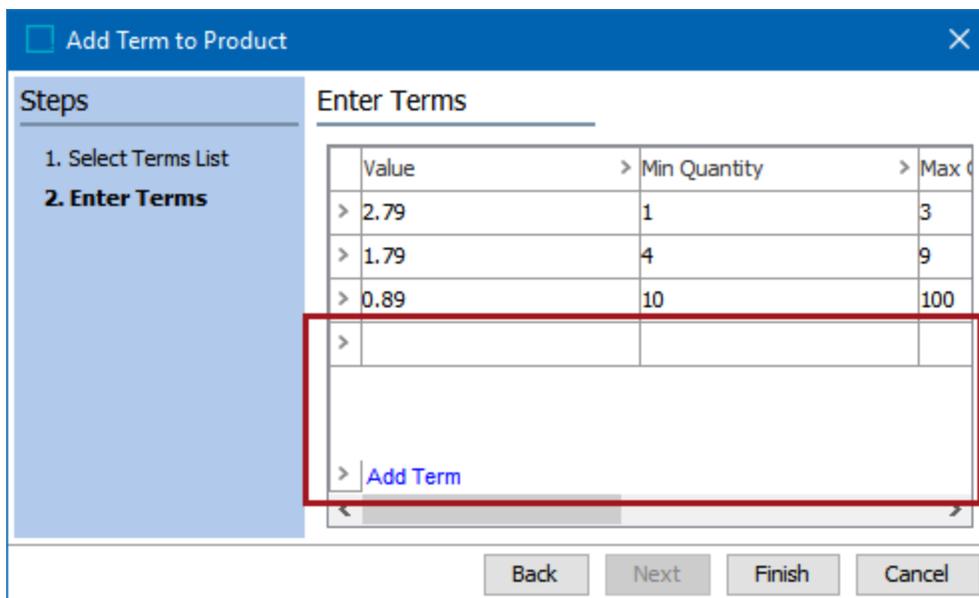
Terms can be added to a product from the **Edit Terms** dialog, or from the **Add Term to Product** dialog. Follow these steps to add a term from the 'Add Term to Product' dialog.

- In the **Tree**, navigate to and select the relevant product.
- On the **Commercial** tab, expand the **Terms** area. The content of the lists related to the product is displayed.
- Click the **Add Term** link at the bottom of the list. Or, right-click on the right arrow next to any term and select **Add Term**.
- In the **Add Term to Product** dialog, click the ellipsis button (...).

- In the **Select Terms List** dialog, browse to or search for the relevant commercial list, then click **Select** to close the dialog.



6. Click **Next** to go to the **Enter Terms** screen, then click **Add Term** to add a new row under **Enter Terms**.



7. Enter the relevant terms, then click **Finish**.

## Remove a Single Term from a Product

1. Follow the steps outlined above to access the **Edit Terms** dialog.
2. Right-click the right arrow next to the preferred term, then choose **Remove Term**.

## Remove All Terms from a Product

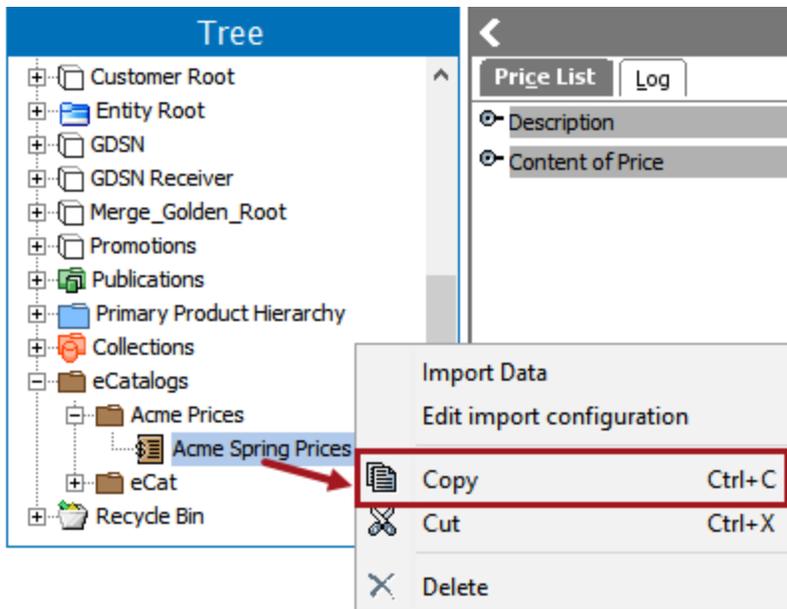
Removing all terms from a product will remove the product itself from the terms list.

1. In the **Tree**, navigate to and select the relevant product.
2. On the **Commercial** tab, expand the **Terms** area. The content of the lists related to the product is displayed.
3. Right-click the right arrow next to the relevant term, then click **Remove Term**.
4. The **Remove terms for product** dialog displays.
5. Verify that you want to remove the listed terms, then click **Delete**. All the product terms are removed, and the product itself is also removed from the list.

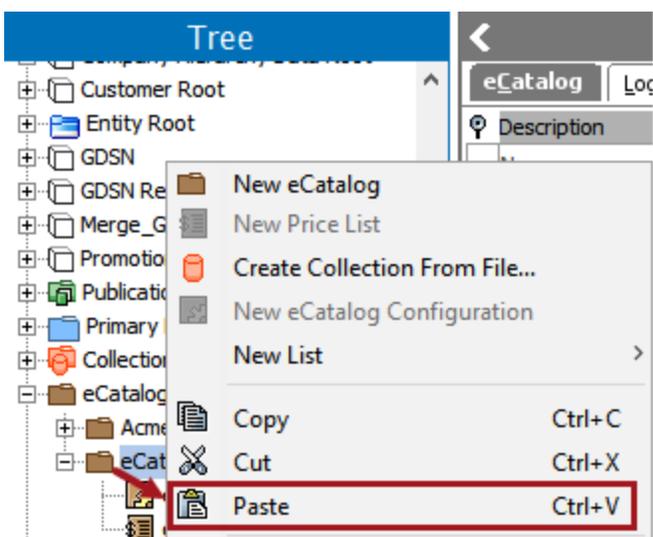
# Copying Price Lists

You can make a copy of a price list and use it as a price list in a different publication. You can also copy price lists to STEP Publisher publications to use as commercial data lists. For more information on Commercial Data, see the **Commercial Data** section of the **STEP Publisher (InDesign)** documentation.

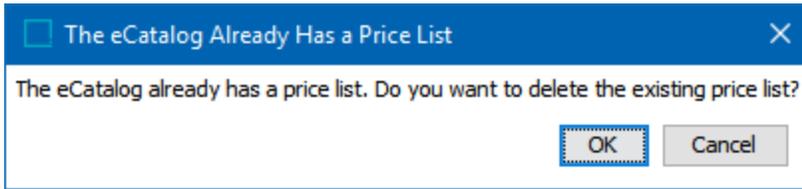
1. Navigate to the **price list** that you want to copy, then right-click and choose **Copy**.



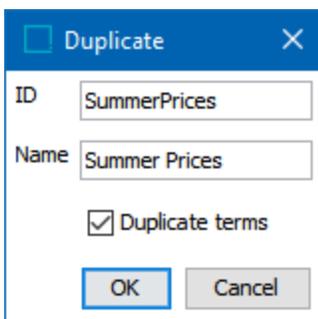
2. Navigate to and select the **eCatalog** that you want to copy the list to, then right-click and choose **Paste**.



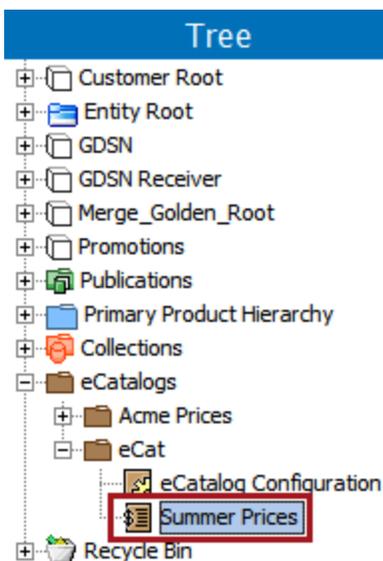
- If the eCatalog already has a list, a warning dialog will display to let you know that the existing price list will be deleted when you paste the new one. Click **OK** to continue and overwrite the price list, or click **Cancel** to exit.



- If the eCatalog does not already have a list, the **Duplicate** dialog displays.
- Enter an **ID** and **Name** for the new list, then check the **Duplicate terms** box if you want to copy the actual contents of the list.



- Click **OK**. The copied terms list is now present in the eCatalog.



# Selecting Products for eCatalogs

There are two methods of selecting the products that should be part of an eCatalog. One way is to use the contents of the price list itself, which is achieved by selecting the **Act as selection list** on the price list. See the **Creating a Price List** topic for more information.

The second method is to link a **collection** to your eCatalog. In the workbench, collections can be created in two ways:

1. Using the **Search** tab, perform a search, and create a collection of the results. This creates a **dynamic** product selection for the catalog that can later be refreshed.
2. Using an **import** file, create a collection of the contents. This creates a **static** product selection for the catalog. If you later want to alter the product selection, you will have to delete this file-created collection and create a new one.

For information on how to create a collection using either method, see the **Creating Collections** topic in the **Getting Started / Super User Guide** documentation.

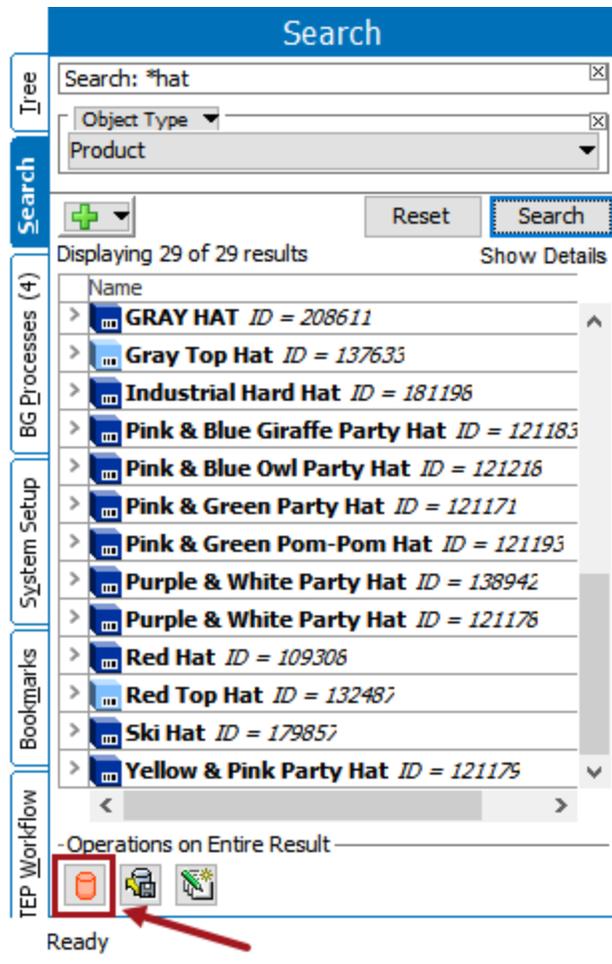
**Note:** It is strongly recommended to use a collection created from a search, since this collection can be refreshed every time the eCatalog is exported. For more information, see the **Selecting Products for eCatalogs** topic.

This topic explains how to add collections to eCatalogs.

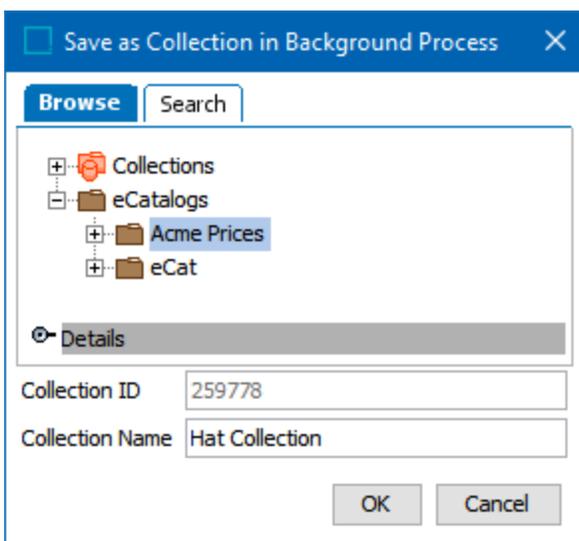
## Add a Dynamic Collection to an eCatalog Through Search

To add a dynamic collection to an eCatalog created from a **search**:

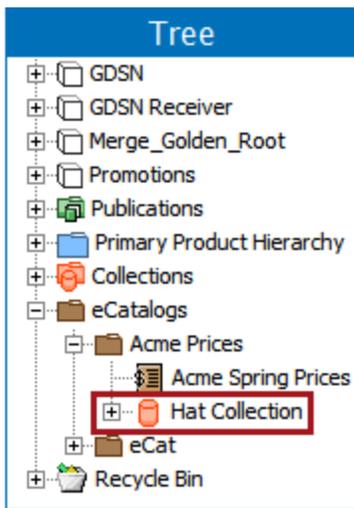
1. On the **Search** tab, search to locate the products that you want to be part of the eCatalog.
2. When the search is complete, click the 'Save as Collection' button .



3. In the **Save as Collection in Background Process** dialog, browse or search for the eCatalog that you want to add the collection to.



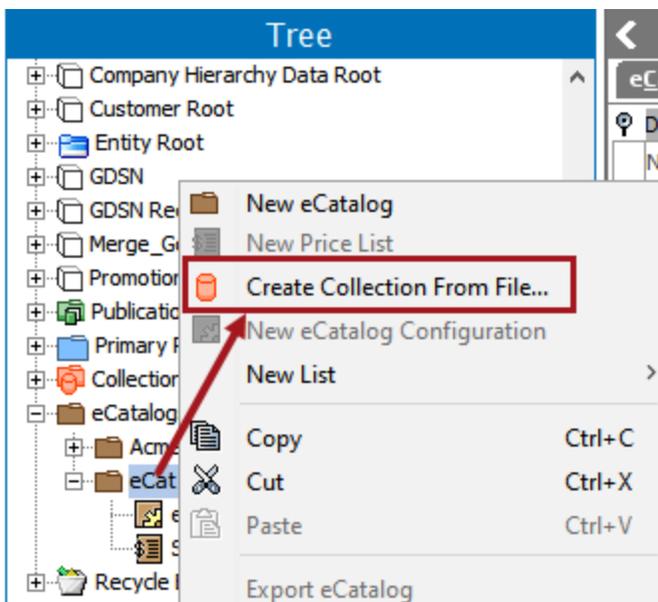
4. For the **Collection Name** parameter, add a Name for the new collection (IDs are autogenerated).
5. A background process launches. When complete, the collection is added to the eCatalog.



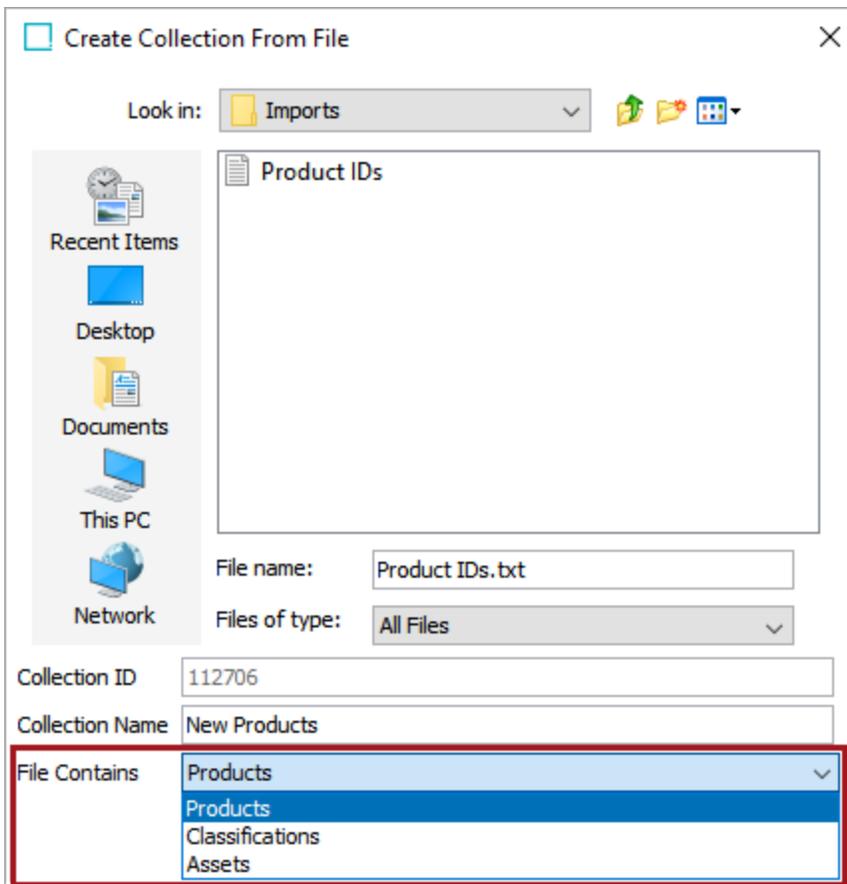
## Add a Static Collection to an eCatalog Through a File

To add a static collection to an eCatalog created from a **file**:

1. Right-click on your eCatalog and select **Create Collection from File**.



2. In the **Create Collection From File** dialog, locate the file to be imported.



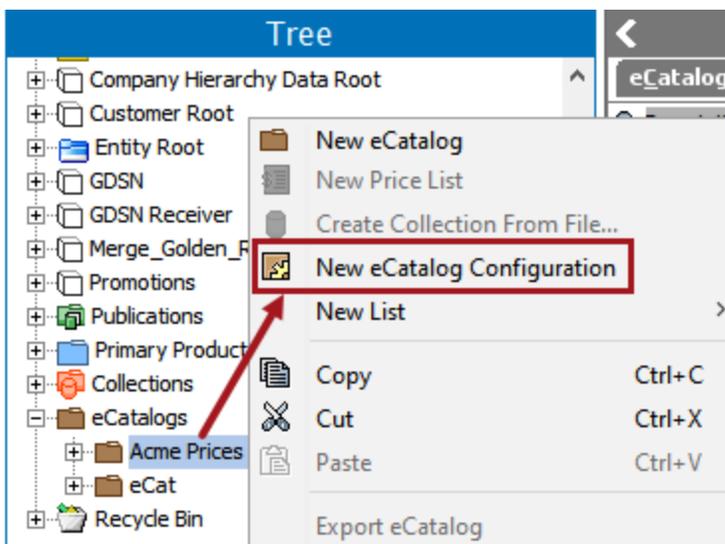
3. For the Collection Name parameter, add a Name for the new collection (IDs are autogenerated).
4. For the File Contains parameter, select if the import file contains IDs of products, classifications, or assets.
5. Click **OK** to start a background process which will create the new collection.

# Creating an eCatalog Configuration

Another required step in creating an eCatalog is to add an **eCatalog Configuration**. This is an export configuration that specifies the **data** to be included in the eCatalog, as well as the data **format** of the eCatalog.

To create and configure an eCatalog Configuration:

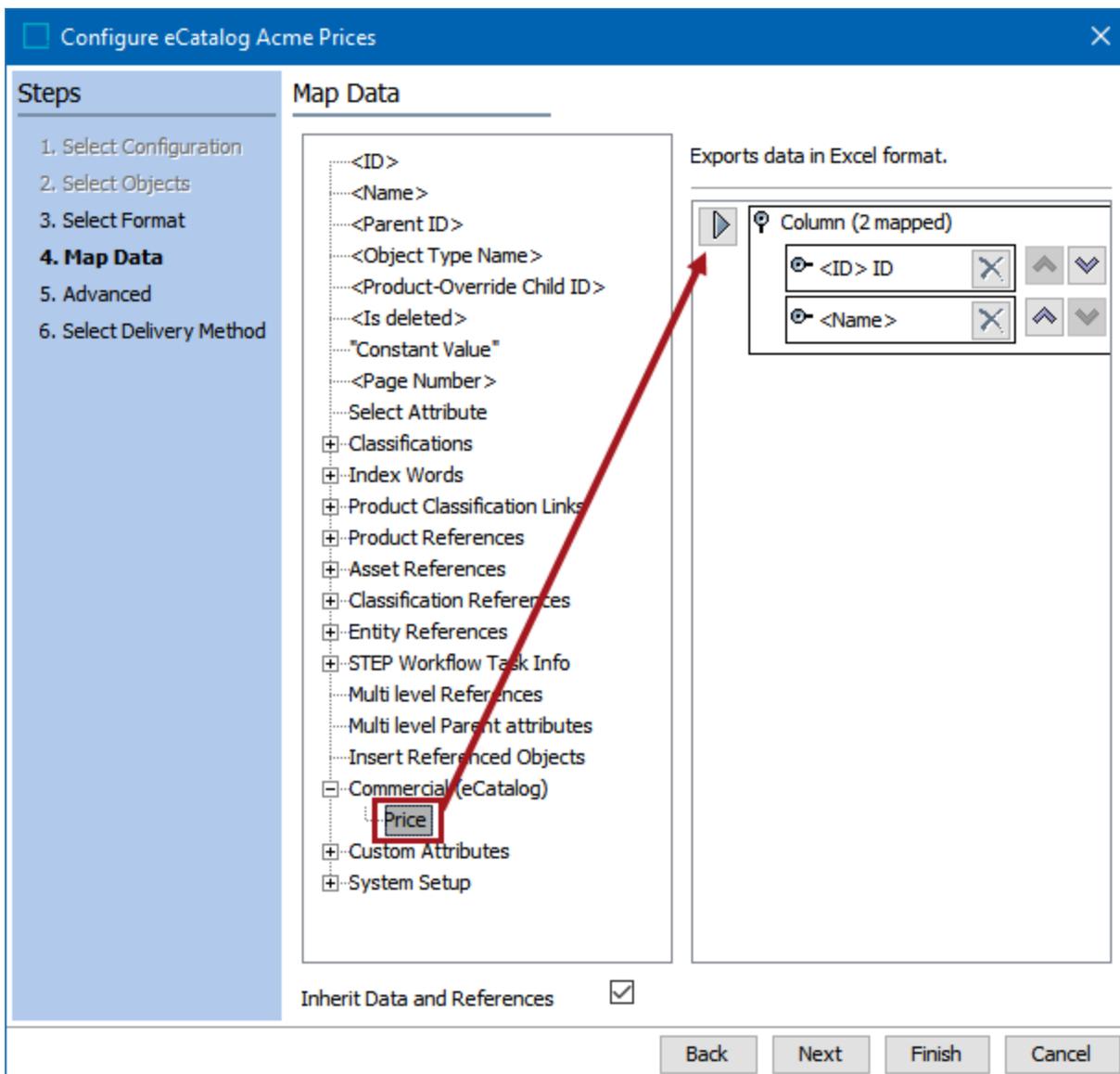
1. Navigate to the relevant eCatalog, then right-click and select **New eCatalog Configuration**.



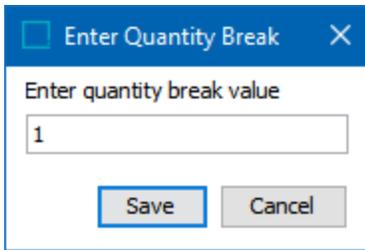
2. The **Configure eCatalog** wizard displays on the **Select Format** screen. The Configure eCatalog wizard is based on the **Export Manager** with added functionality, allowing you to map the prices from the price list information of the current eCatalog into the selected output format. You can choose among the following eCatalog formats, which are supported via export options:
  - **Excel**: See the **Excel Format** section of the **Data Exchange** documentation for more information.
  - **BMEcat 1.2**: An XML-based standard for electronic data transfer by electronic catalogs. See the **BMEcat Format** section of the **Data Exchange** documentation for more information.
  - **Ariba CIF 3.0**: A simple comma-delimited list of catalog items and their attributes. See the **Ariba CIF 3.0 Format** section of the **Data Exchange** documentation for more information.
  - **cXML**: Exports data using Ariba cXML 1.2 and is an XML-based language designed specifically for communication of e-commerce business documents. See the **cXML Format** section of the **Data Exchange** documentation for more information.
  - **xCBL**: exports data using the CommerceOne XML-based language. See the **xCBL Format** section of the **Data Exchange** documentation for more information.

## Configure an eCatalog Configuration for Excel

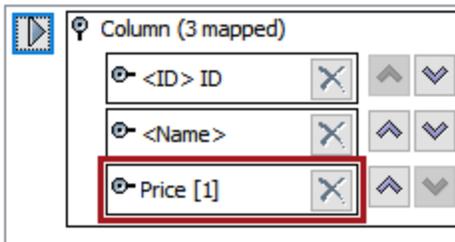
1. Select **Excel** from the dropdown list on the **Select Format** screen of the Configure eCatalog wizard, then click **Next**.
2. On the **Map Data** screen, click on the relevant information that you want included in the export (for instance, <ID>), then click the arrow button in the right part of the window to add it to the list of data to be exported. At a minimum, you must map **ID** and a **price** column. **Name** is also recommended.
3. To map the price data, expand **Commercial (eCatalog)**. Select the relevant price list (in this example, 'Price'), then click the arrow icon to add it as a column in the Excel sheet.



4. In the **Enter Quantity Break** dialog that displays, enter the quantity break value (e.g., 1), then click **Save**.

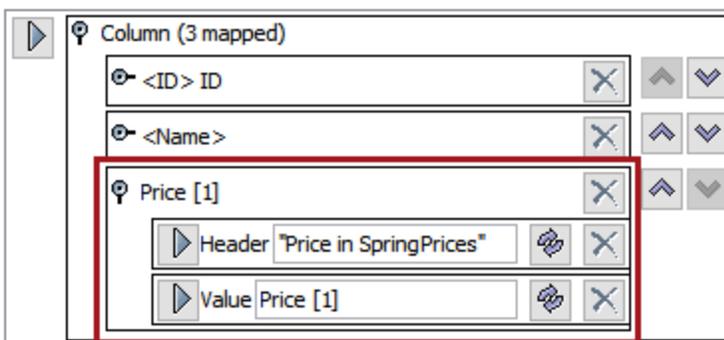


- The price value is mapped, followed by the break number in brackets, e.g., [1].

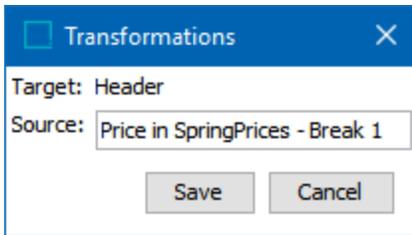


- If you would like to apply **transformations** to the values that display in the export, click the 'flipper' icon next to Price to view the fields that have the transformation icon ( ) available. When mapping a commercial value, you have the same transformations available as you would have for a product attribute, but the available **aspects** differ.

For more information on applying aspect transformations to outbound data, see the **Aspect - Transform Outbound** topic in the **Data Exchange** documentation. For a broader overview on applying transformations to outbound data, see the **Outbound Map Data - Transform** topic in the **Data Exchange** documentation.



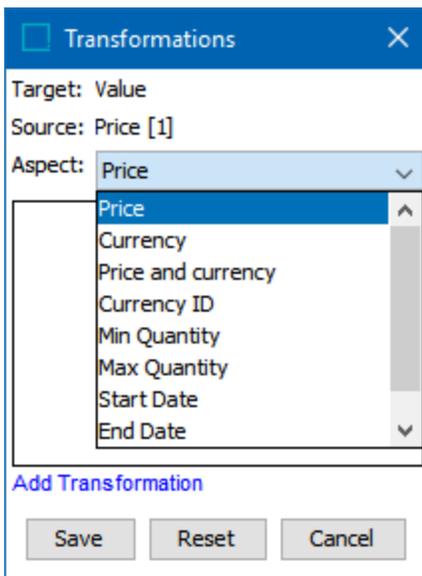
- Click the transformation icon ( ) next to the **Header** field to change the header that will display in the Excel export spreadsheet for the price value. In the **Transformations** dialog, enter the desired header in the **Source** field, then click **Save**.



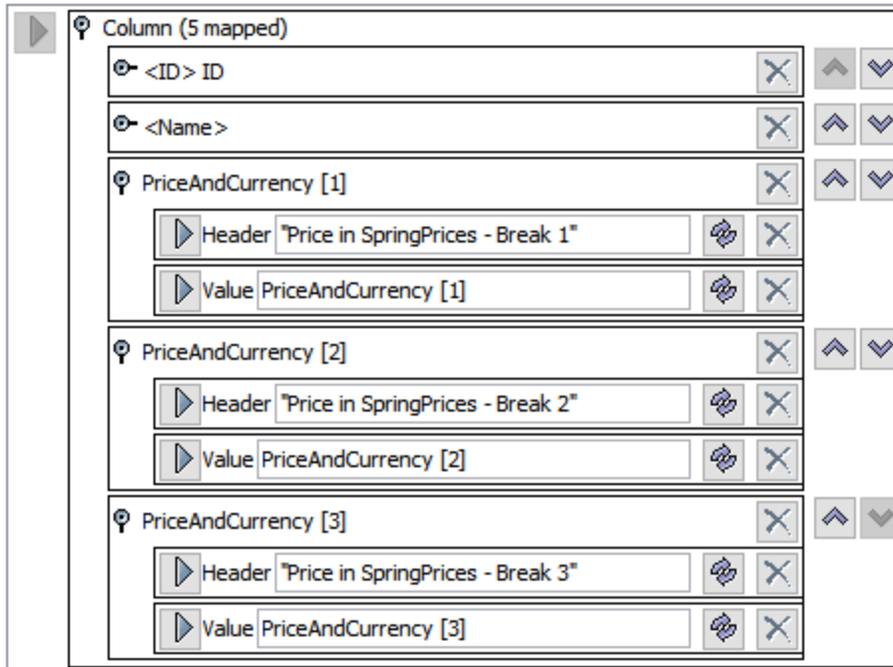
**Note:** If the header is not changed, then the header in the Excel sheet will be the same for all price breaks, e.g., 'Price in SpringPrices.' As such, it is recommended to customize the header for each break, for example, 'Price in SpringPrices - Break 1.'

8. Click the transformation icon (  ) next to the **Value** field if you want to apply a transformation to the values that display in the price columns. If changing the **aspect**, the following selections are available:

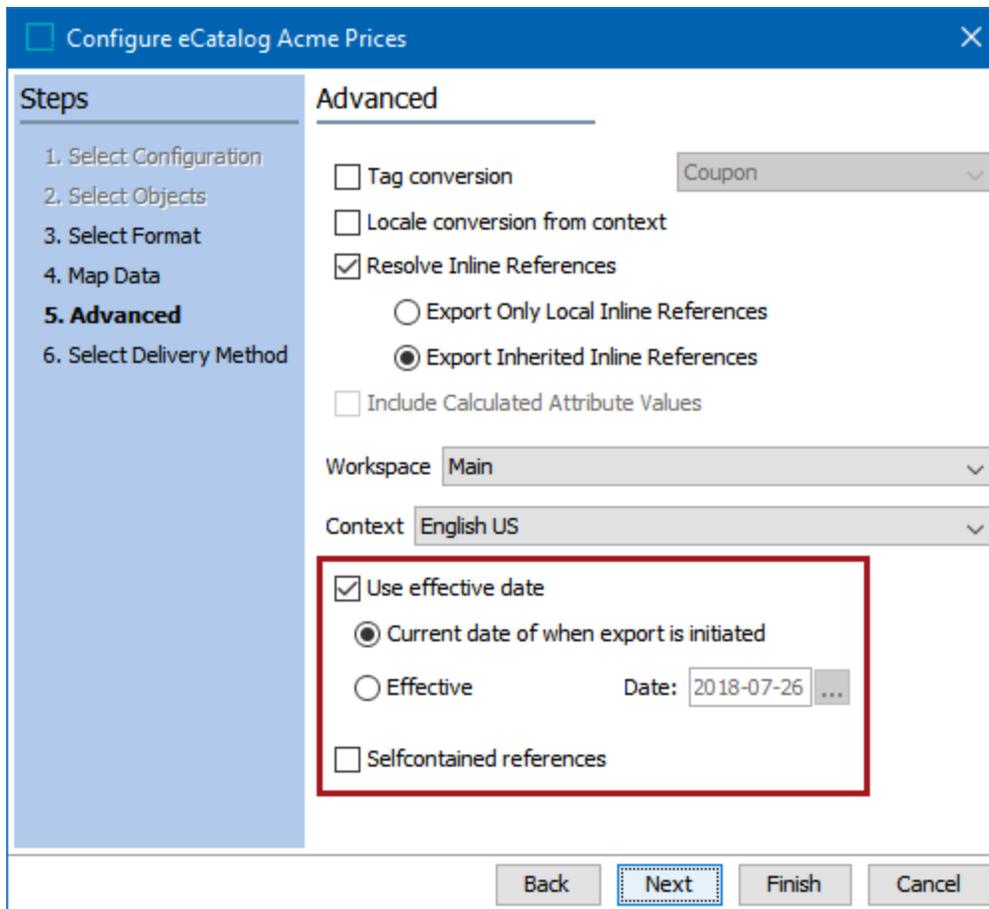
- **Price** - default; the value field from the commercial list
- **Currency** - the unit from the commercial list
- **Price and currency** - both the value and the unit from the commercial list
- **Currency ID** - the ID of the unit from the commercial list
- **Min Quantity** - the Min. Quantity value from the commercial list
- **Max Quantity** - the Max. Quantity value from the commercial list
- **Start Date** - the Start Date value from the commercial list
- **End Date** - the End Date value from the commercial list



9. Repeat the process to map values from additional price breaks. The following screenshot shows a sample mapping with ID, Name, and three price breaks with transformations applied:



10. Click **Next** on the **Map Data** screen when finished.
11. On the **Advanced** screen, additional options specific to eCatalog exports are included in addition to the options available in the standard Export Manager. For information on the *standard* options available on this screen, see the **Export Manager - Advanced** section of the **Data Exchange** documentation. The *additional* options for eCatalogs are highlighted in the below screenshot.



- **Use effective date:** Select this option if you want the system to take the 'start date' and 'end date' specified on the price list into consideration when exporting prices. 'Use effective date' ensures that prices will only be included in the export if the effective date lies within the specified period. Leave this box unselected to have the system disregard the 'start date' and 'end date' applied to products on the price list.

If selected, then specify one of the following options:

- Select **Current date of when export is initiated** to ensure that the prices included in the export have a start date that occurs on or before the date that the export is initiated. If the start date of a price on the price occurs *after* the current date, then that price will not be included, since it is not yet valid.
- Select **Effective** to ensure that the prices included in the export have a start date that occurs on or before the date specified. As with the 'current date' option, if the start date of a price on the price list occurs *after* the effective date, it will not be included in the export.

If no date span has been specified for the prices, the effective date will have no effect.

- **Selfcontained references:** Select this option if there is a need for the export to be self-contained. This ensures that no references will be allowed to point to anything outside of the export.

12. Click Next to advance to the **Select Delivery Method** screen.
13. Select **File**, then click **Finish**.

## Configure an eCatalog Configuration for BMEcat

This section describes how to configure information specific to eCatalogs when using the BMEcat format for your eCatalog Configuration. For full details on how to configure the rest of the information required for a BMEcat export, see the **BMEcat Format** section of the **Data Exchange** documentation.

1. Select **BMEcat** from the dropdown list on the **Select Format** screen of the Configure eCatalog wizard.
2. Fill out any relevant fields on the screen, then click **Next**.
3. On the **Map Data** screen, the following mandatory fields are marked in red text with an asterisk: Supplier Article ID, Short Description, Order Unit, and Price. Since this guide concerns eCatalogs, the **Price** field will be mapped.
4. To map the price data, expand **Commercial (eCatalog)**. Select the relevant price list (in this example, 'Price'), then click the arrow icon next to **Price** to add it as a column in the Excel sheet.

**Configure eCatalog Acme Prices**

**Steps**

1. Select Configuration
2. Select Objects
3. Select Format
- 4. Map Data**
5. Advanced
6. Select Delivery Method

**Map Data**

Converts data to a BMEcat 1.2 format (see [www.bmecat.org](http://www.bmecat.org)).

Article Features (0 mapped)

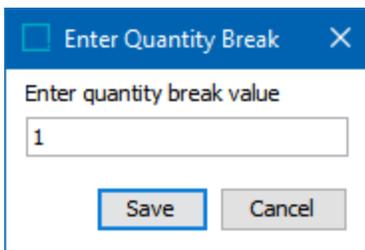
- Order Unit \* Nothing mapped
- Content Unit Nothing mapped
- Packing quantity Nothing mapped
- Price Quantity Nothing mapped
- Minimum Quantity Nothing mapped
- Quantity Interval Nothing mapped
- Price start date Nothing mapped
- Price end date Nothing mapped
- Daily Price? Nothing mapped
- Price \* (0 mapped)**
- MIME Info (0 mapped)
- MIME Info (Catalog Group Assets) (0 mapped)
- User Defined Extension (0 mapped)
- Article Reference (0 mapped)
- Catalog Group Map (0 mapped)

Inherit Data and References

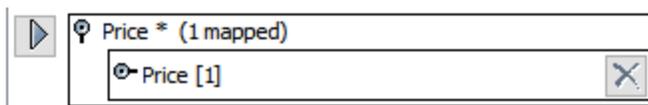
\* = Mandatory field    Red = Unmapped mandatory field

Back    Next    Finish    Cancel

- In the **Enter Quantity Break** dialog that displays, enter the quantity break value (e.g., 1), then click **Save**.

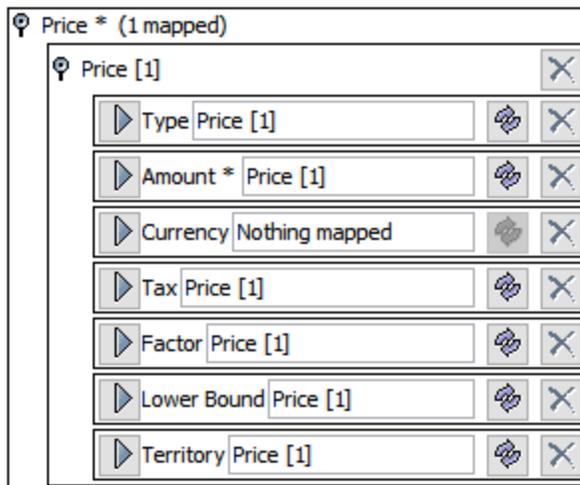


- The price value is mapped, followed by the break number in brackets, e.g., [1].



- If you would like to apply **transformations** to the values that display in the export, click the 'flipper' icon next to Price to view the fields that have the transformation icon () available. When mapping a commercial value, you have the same transformations available as you would have for a product attribute, but the available **aspects** differ. The available aspects in the price transformations for the BMEcat format are the same as those available for Excel exports. See the above subsection, 'Configure an eCatalog Configuration for Excel,' for more information.

For more information on applying aspect transformations to outbound data, see the **Aspect - Transform Outbound** topic in the **Data Exchange** documentation. For a broader overview on applying transformations to outbound data, see the **Outbound Map Data - Transform** topic in the **Data Exchange** documentation.



**Note:** Commercial (eCatalog) > Price values can be mapped to other fields other than 'Price.' For example, You could map to the 'Minimum Quantity' field, then apply an Aspect transformation to pull the 'Min Value' value from the price list.

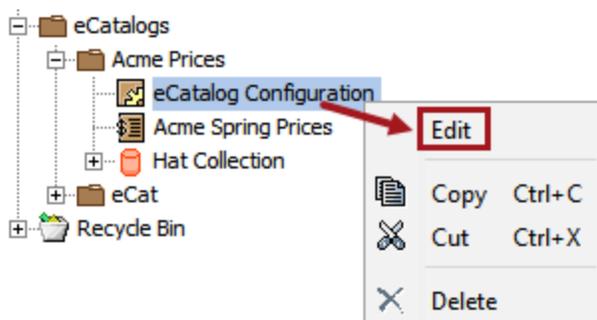
8. Click **Next** on the **Map Data** screen when finished.
9. On the **Advanced** screen, additional options specific to eCatalog exports are included in addition to the options available in the standard Export Manager. For information on the *standard* options available on this screen, see the **Export Manager - Advanced** section of the **Data Exchange** documentation. The *additional* options for eCatalogs are the same as those available for Excel exports (User effective date, etc.). See the above subsection, 'Configure an eCatalog Configuration for Excel,' for more information.
10. Click Next to advance to the **Select Delivery Method** screen.
11. Select **File**, then click **Finish**.

## Configuring eCatalog Configurations for Other Formats

The process for creating an eCatalog Configuration for other available formats (**Ariba CIF 3.0**, **cXML**, and **xCBL**) is very similar to that for creating configurations for Excel and BMEcat exports. Though the available data fields differ on the **Map Data** screen of the **Configure eCatalog** wizard for each format, the process for mapping Commercial (eCatalog) > Price is the same, and the available aspects for transformations are the same. Additionally, the same options ('Use effective date,' etc.) are available on the **Advanced** screen.

## Editing an Existing eCatalog Configuration

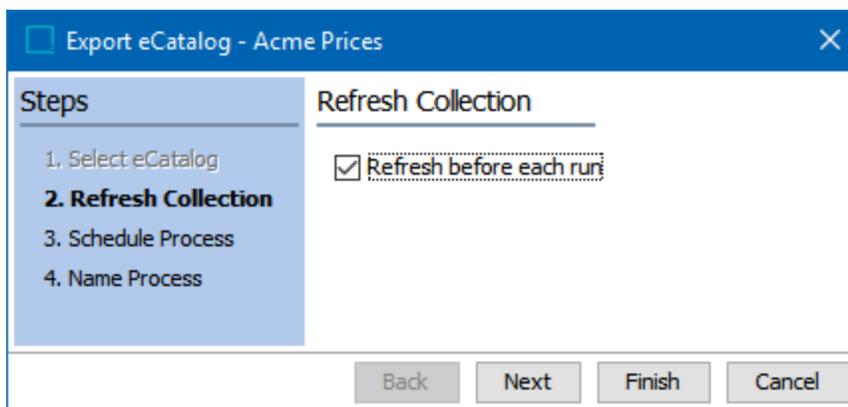
1. To edit an existing eCatalog Configuration, right-click the configuration and select **Edit**.



2. The **Configure eCatalog** wizard displays. Follow the same steps as you would when creating a new configuration.

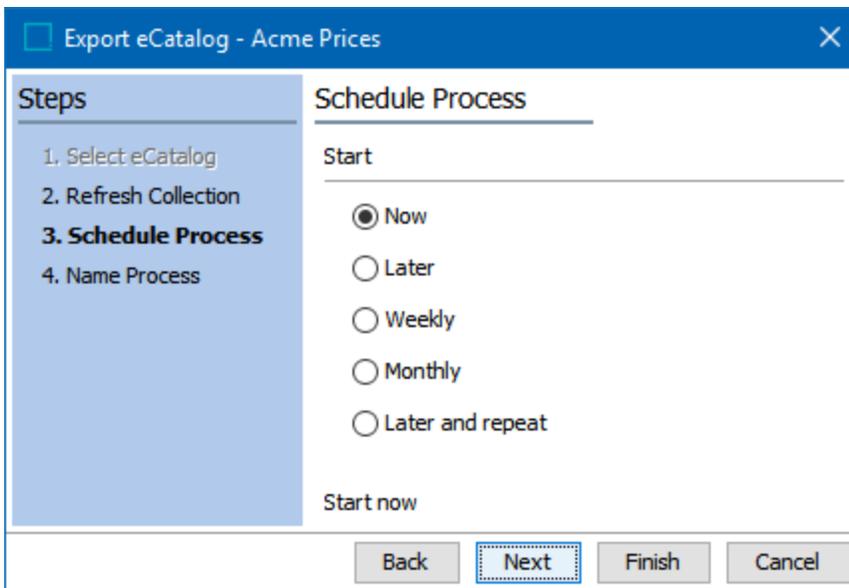
## Exporting an eCatalog

1. In the **Tree**, right-click the relevant eCatalog, then select **Export eCatalog**. The **Export eCatalog** wizard displays on the **Refresh Collection** screen.
2. Select **Refresh before each run** if you want the collection to be refreshed before each export. This option is only relevant for collections created from a search. It does not apply if your collection was created from a list or if you are using the price list as the product selection.

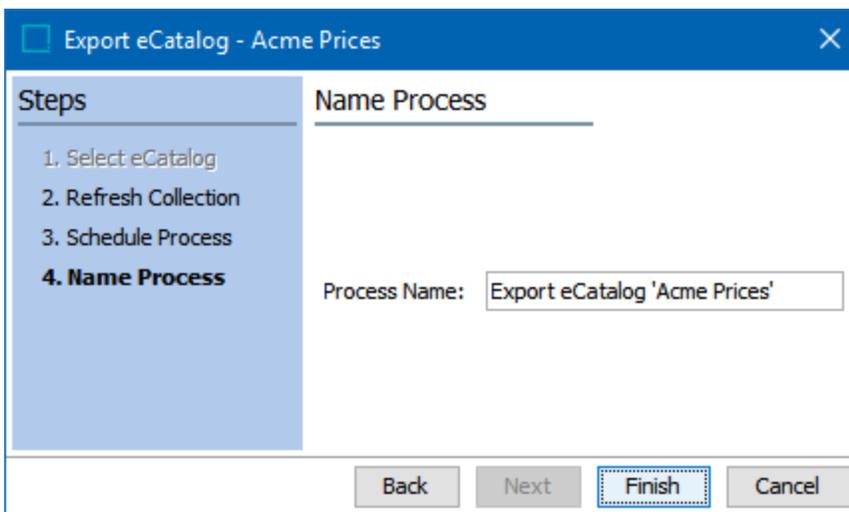


3. On the **Schedule Process** screen, specify whether you want to export the eCatalog immediately or at a specified time in the future, then click **Next**. You have the following options:
  - **Now**: Starts the eCatalog Export process and delivers the eCatalog as specified in the eCatalog Configuration.
  - **Later**: Schedules a single delivery in the future at the specified time and date.
  - **Weekly**: Schedules a recurring eCatalog export for one or more of the days of the week. This option requires a time, a start date, and optionally an end date. If no end date is specified, the eCatalog scheduling process runs until it is ended manually.
  - **Monthly**: Schedules a recurring export of the eCatalog for a specific day of every month.
  - **Later and repeat**: Schedules delivery in the future at the specified time and date and at an interval given in minutes.

**Important:** Consider the time zone of the application server compared to that of the workbench (the client) where the schedule is created or viewed. When scheduling a job, the local time zone is displayed in the workbench, but the time zone of the server is used to run the background process. Although displayed, the time zone of the client is not included in the instruction to the server to run the job. This can cause confusion about when the job will run since the scheduled time is not automatically converted to accommodate potential differences in time zones.



4. On the **Name Process**, provide a name for the process. An auto-generated name is provided, but you can change it to make it easier to identify the process.



5. Click **Finish** to either start the export process or a scheduling process, depending on the specified settings.