



# USER GUIDE

## eCatalogs

2024.3 – September 2024

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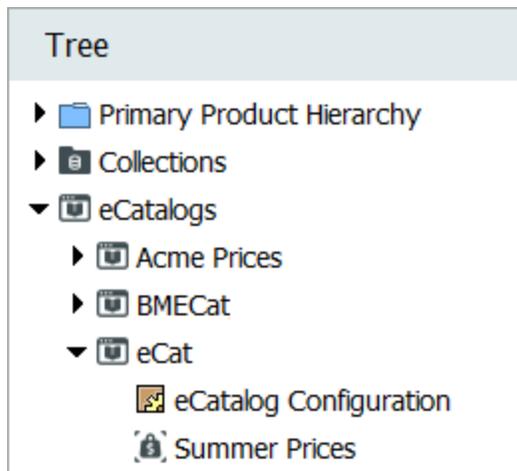
# eCatalogs

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

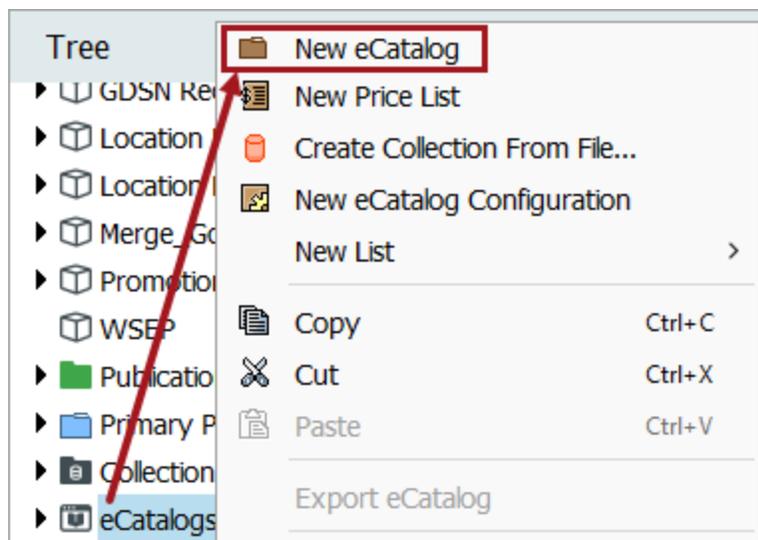
Price lists used in eCatalogs are identical in format to the price lists used for commercial data in Print Publisher. They contain the same elements (Value, Unit, Quantity, Dates), use the same default System Setup commercial object type of Price (Price), and are mapped identically in the Import Manager. 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 Print 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, refer to the Commercial Data section of the Publisher (Adobe InDesign Integration) documentation.

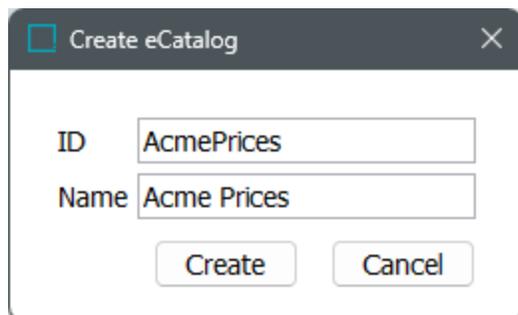
## Creating an eCatalog

To create a new eCatalog, follow these steps.

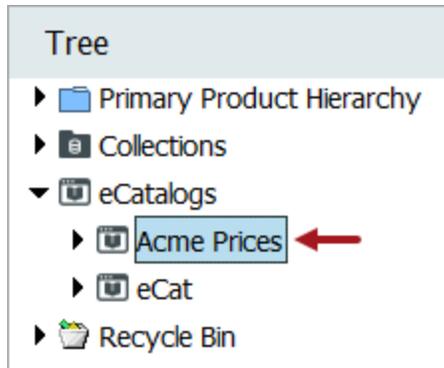
1. In the Tree, select **eCatalogs**.
2. Right-click and select **New eCatalog**.



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:

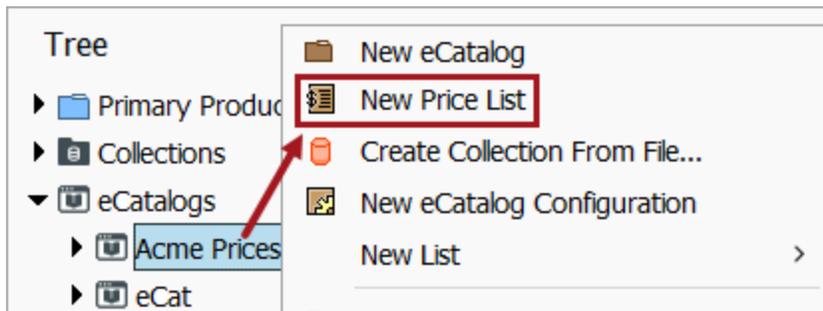
- A price list that contains the prices that are valid for the eCatalog.
- A product collection that contains a list of all the products that go into the eCatalog.
- An eCatalog configuration that specifies the output format, the delivery method, and the mapping between internal product attributes and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

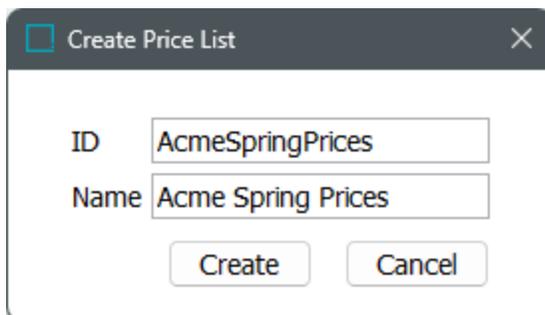
The first step when setting up your eCatalog is to create a price list that holds the prices of the eCatalog.

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, refer to the Commercial Data topic of the Publisher (Adobe InDesign Integration) documentation.

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



4. On the **Price List** tab, the following optional settings are available.

**Tree** ✕

- ACME Lookup Tables
- ▶ ACME Part Type Root
- ▶ ACME Web Store
- ▶ Article Groups
- ▶ Assets
- ▶ Bulk Update Configurations
- ▶ Classifications
- ▶ Configurations
- ▶ UNSPSC
- ▶ Web Images
- ▶ Web Sites US
- ▶ Customer Root
- ▶ Promotions
- WSEP
- ▶ Publications
- ▶ Primary Product Hierarchy
- ▶ Collections
- ▼ eCatalogs
  - ▼ Acme Prices
    - eCatalog Configuration
    - Acme Spring Prices

### Acme Spring Prices

Price

Price List Log

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▼ **Description**

Name	Value
ID	AcmeSpringPrices
Name	Acme Spring Prices
Object Type	Price
Immutable	<input type="checkbox"/>
Act as selection list	<input type="checkbox"/>
Import Configuration	<span style="float: right;">⋮</span>
Currency	<span style="float: right;">⋮</span>
Last modification time	<span style="float: right;">📅</span>
Expiry date	<span style="float: right;">📅</span>
Default Start-date	<span style="float: right;">📅</span>
Default End-date	<span style="float: right;">📅</span>
Table Header	RBC

- **Immutable:** When checked, this setting prevents commercial data from being updated.
- **Act as selection list:** Enable this option to have the products included in the price list serve as the product selection for the eCatalog. If a **collection** is added to the eCatalog, the collection serves as the product list, and this option will be disabled. For more information on adding a collection to an eCatalog, refer to the Selecting Products for eCatalogs topic.
- **Import Configuration:** Specifies the import configuration to be used for the price list. Click the ellipsis button (⋮) to select the saved import configuration.
- **Currency:** Click the ellipsis button (⋮) to choose a currency unit for the list. This selection can be any unit and does not have to be currency.

**Note:** This does not place the unit on price lists values. To have the unit display within terms lists, the unit must be added when defining the import configuration by mapping the values of an Excel column to the 'Unit' aspect of the terms list. Refer to the Creating an eCatalog Configuration topic 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. Refer to 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.

	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

For example, using the first product row shown in the above 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

**Note:** To only 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. To load three price breaks, you must 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, and others) will also have its own unit, start date, and end date columns.

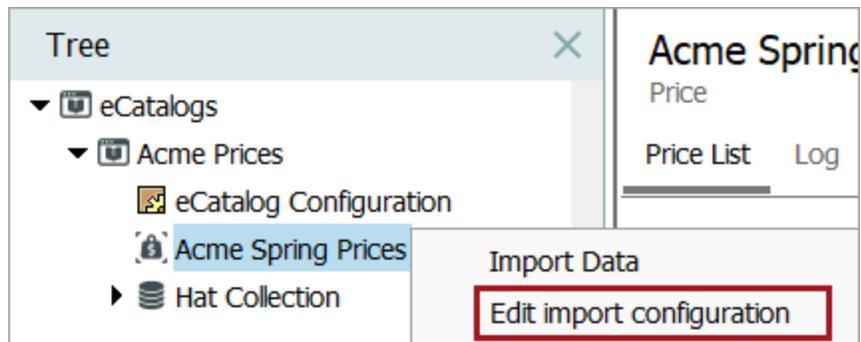
**Note:** When importing **units**, the **STEP ID** of the unit must be used and not the symbol. In the below example, iso4217.unit.USD is the STEP ID for U.S. dollar (\$).

	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**.

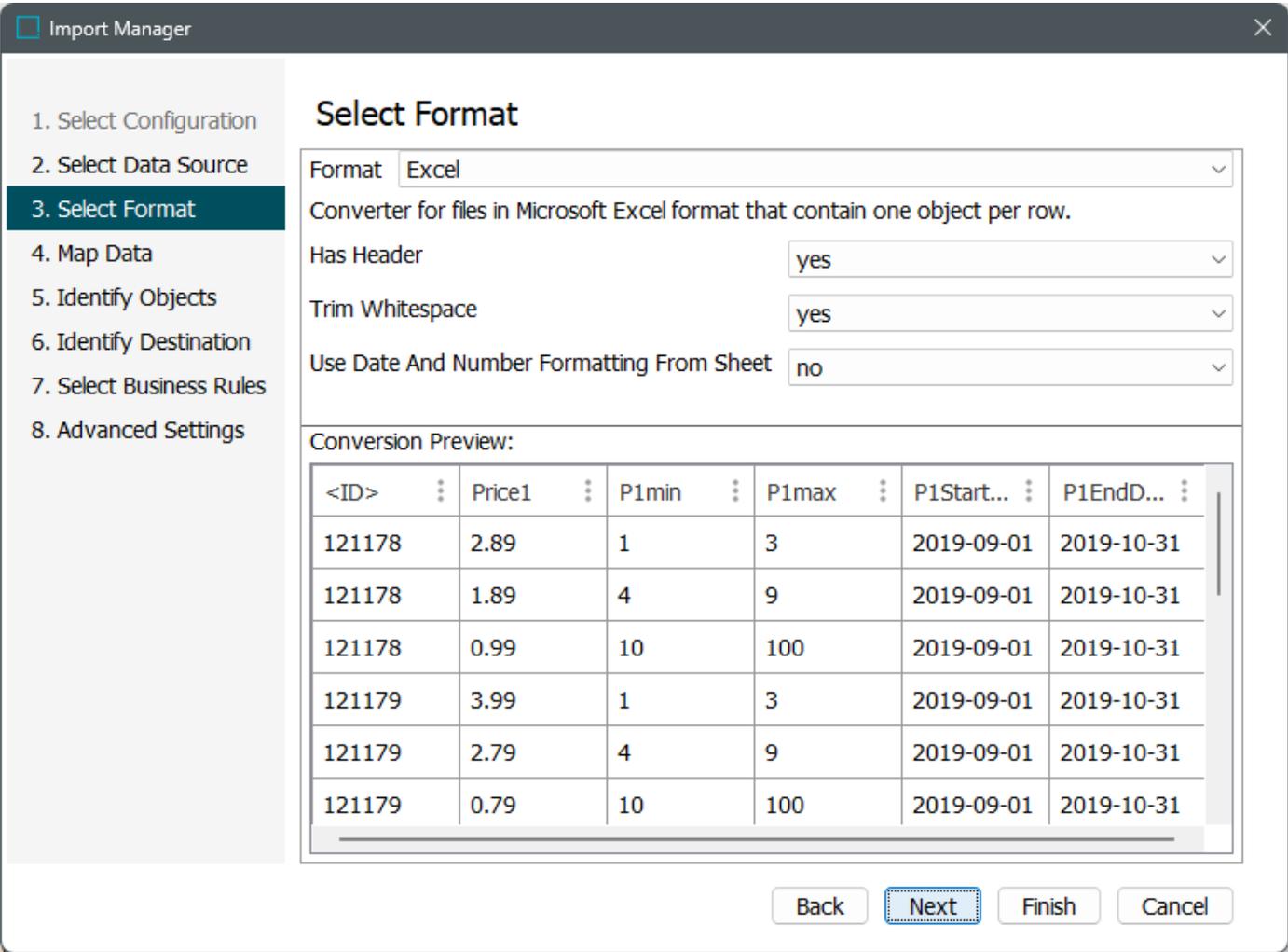


3. The Import Manager displays on the Select Data Source screen.

**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 topic 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**.

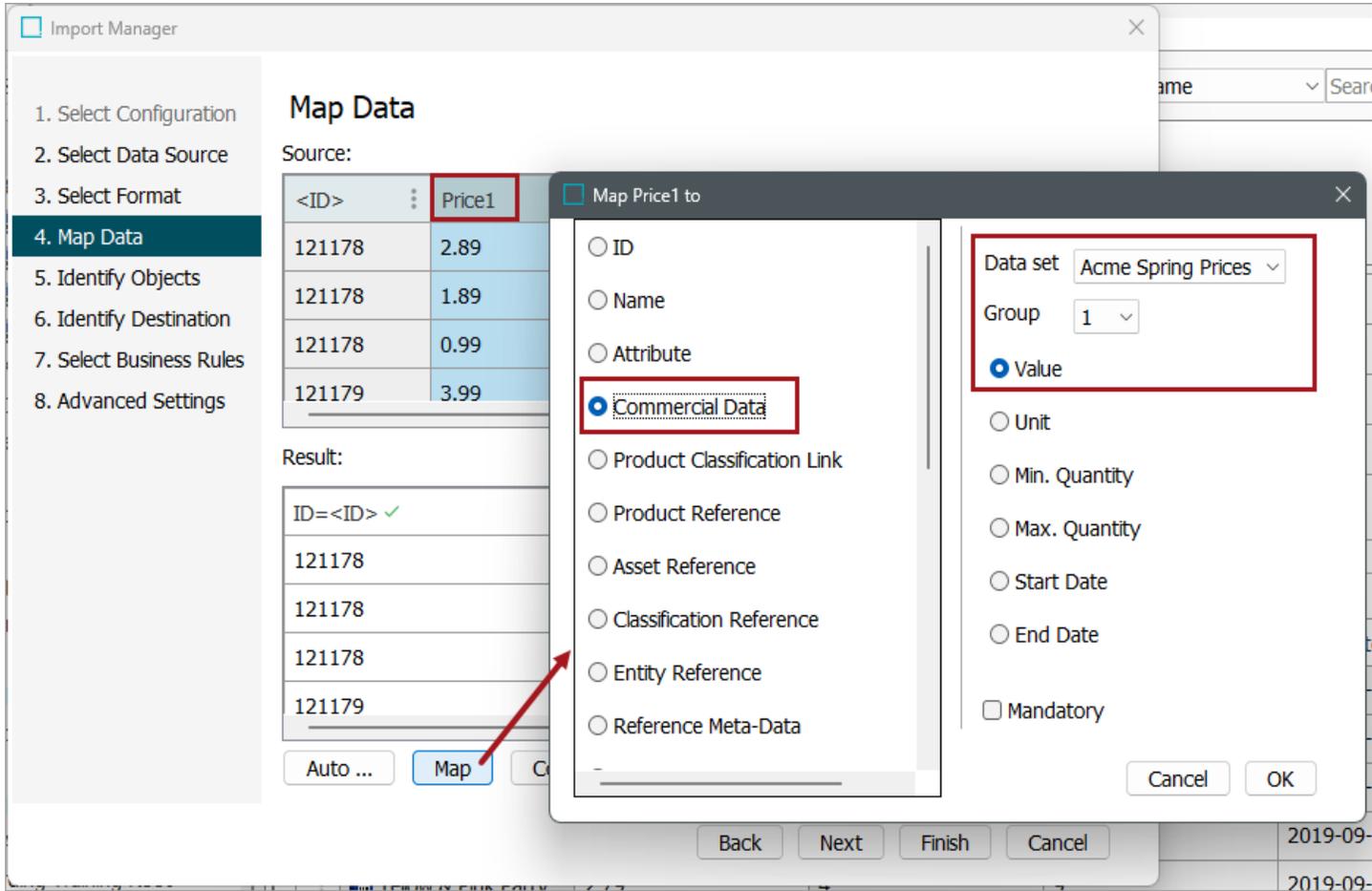
**Note:** It is strongly recommended to keep the default selection of 'no' for 'Use date and number formatting from sheet', especially if importing date values. This ensures that date values are standardized into an ISO format. Refer to the Excel Format topic of the Data Exchange documentation for more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



### 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.

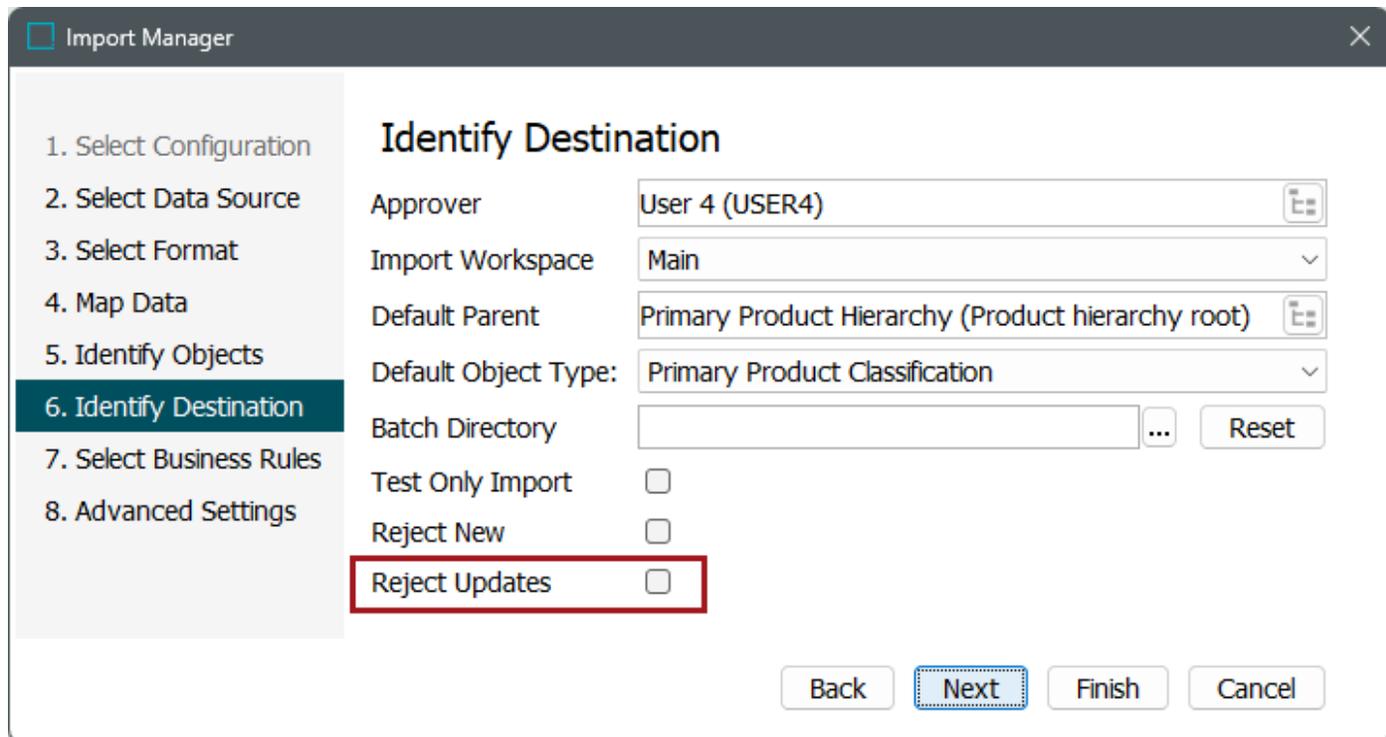


4. The name of the price list will display in the Data Set field.
5. From the Group list, select the preferred quantity break.
6. Choose one of the following options to determine which field of the commercial list that the data from the Excel sheet should be mapped to:
  - Select **Value** to map the 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.
7. 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**.

8. 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.
9. 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 Data Exchange 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.



**Import Manager**

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

### Identify Destination

Approver: User 4 (USER4)

Import Workspace: Main

Default Parent: Primary Product Hierarchy (Product hierarchy root)

Default Object Type: Primary Product Classification

Batch Directory: [ ] [Reset]

Test Only Import:

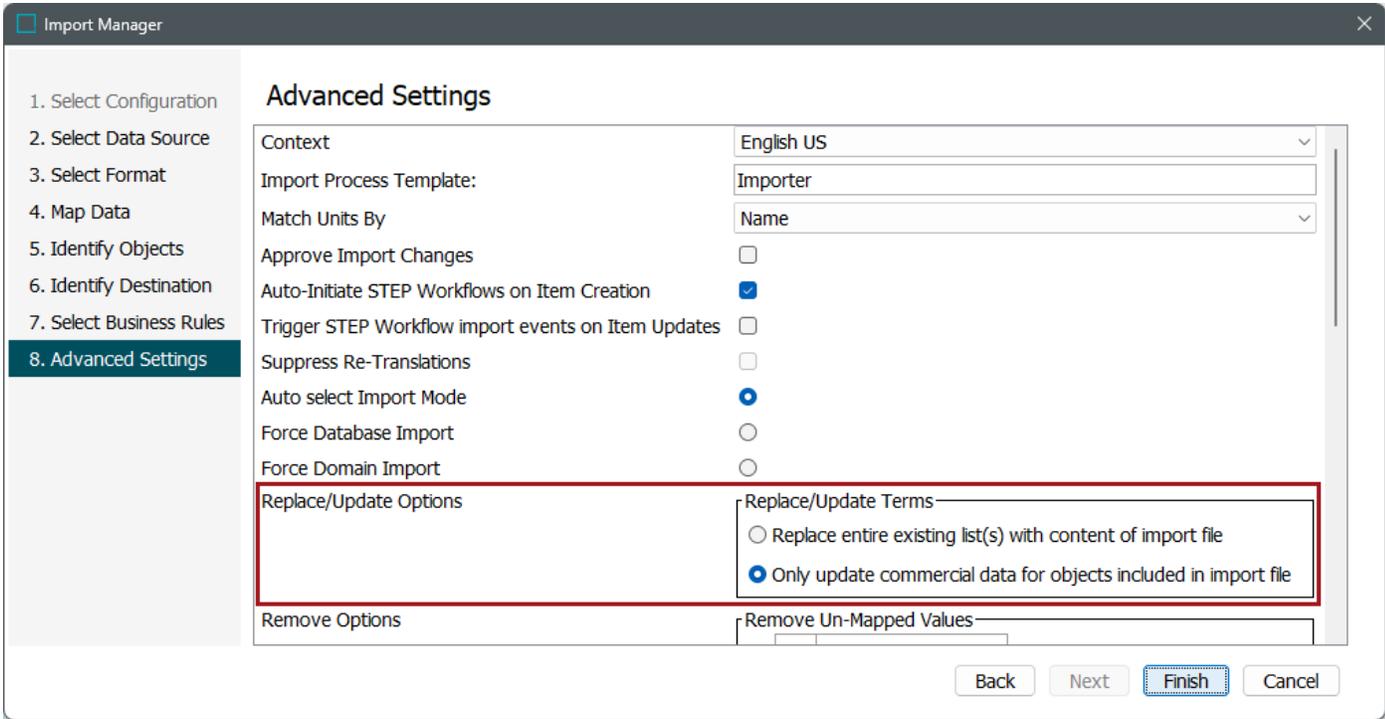
Reject New:

**Reject Updates:**

Back Next Finish Cancel

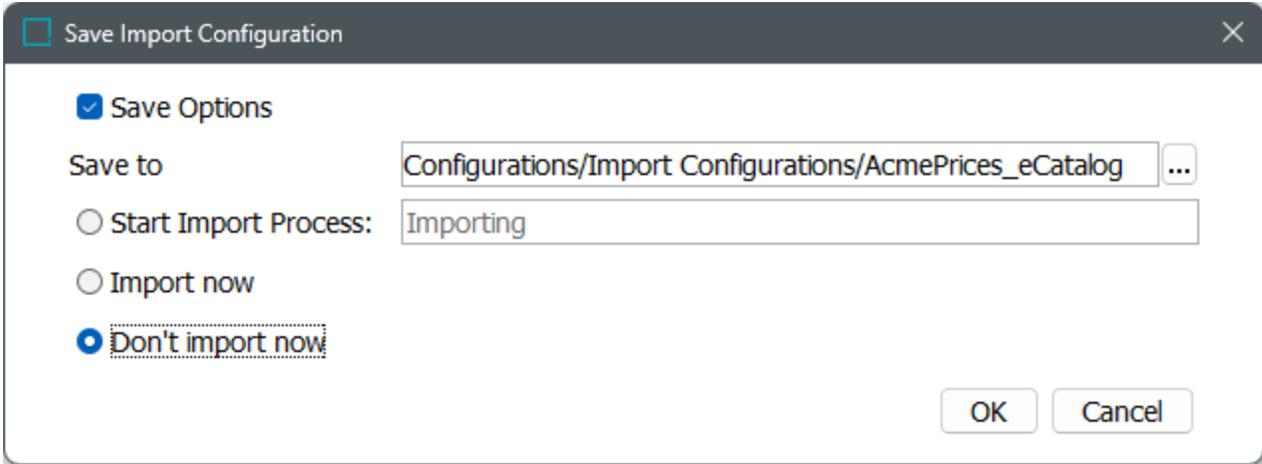
3. On the Select Business Rules screen, business rules can be specified to run upon import if required for your business needs. For more details, refer to the Import Manager - Select Business Rules topic in the Data Exchange documentation. Click **Next**.
4. On the Advanced Settings screen, any options 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, refer to the Import Manager - Advanced Settings topic in the Data Exchange documentation.



- 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**.

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

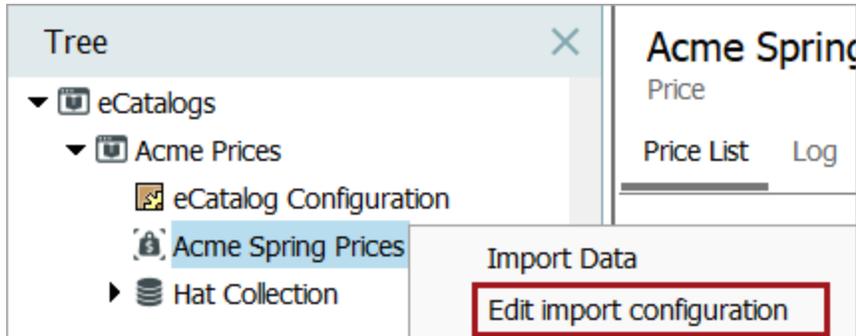


- The price list import configuration is saved in the specified classification structure as an XML file of the object type Import Manager Configuration (stibo.ImportManagerConfig).
- A price list can now be imported. Refer to the Importing Prices topic, for details.

## 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'.



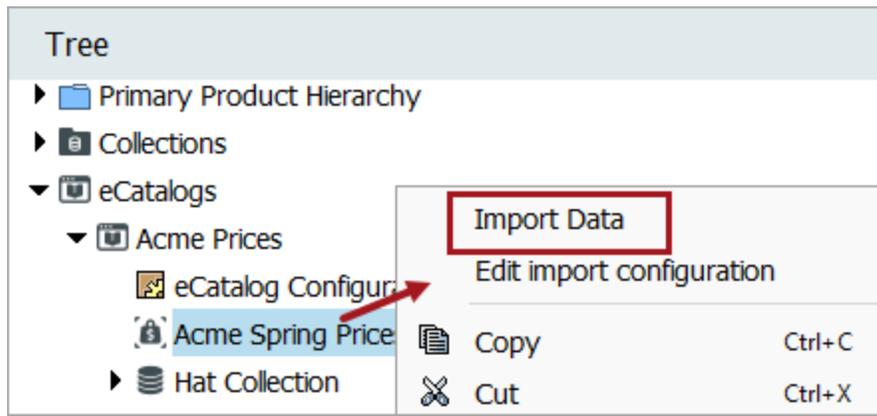
2. The Import Manager wizard displays, starting on the 'Select Data Source' screen.
3. Make the desired edits following the same steps listed above for creating a new configuration.
4. Alternatively, you can edit the configuration by right-clicking on the saved import configuration object in the classification hierarchy. Refer to 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.

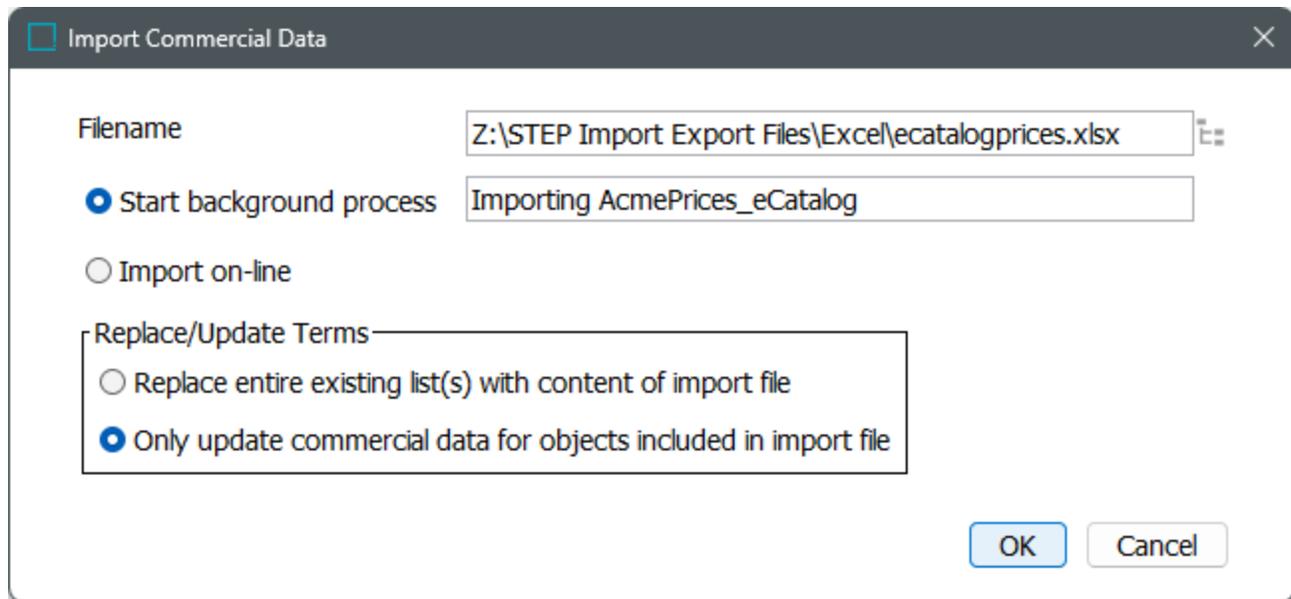
To import eCatalog price information:

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. Refer to the Creating a Price List topic for more information.

4. Select 'Import on-line' radio button 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 and Searching 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 'Contents of' area.
3. The contents of the price list are displayed.

### Acme Spring Prices

Price

Price List Log

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> **Description**

▼ **Contents of Price**

Product  Search

Showing 19 terms. There are terms for 7 different objects.

	Object	Value	Min Quantity	Max Quantity	Start Date	End Date
⋮	Purple & White Party Hat	2.89	1	3	2019-09-01 00:00:00	2019-10-31 00:00:00
⋮	Purple & White Party Hat	1.89	4	9	2019-09-01 00:00:00	2019-10-31 00:00:00
⋮	Purple & White Party Hat	0.99	10	100	2019-09-01 00:00:00	2019-10-31 00:00:00
⋮	Yellow & Pink Party Hat	3.99	1	3	2019-09-01 00:00:00	2019-10-31 00:00:00
⋮	Yellow & Pink Party Hat	2.79	4	9	2019-09-01 00:00:00	2019-10-31 00:00:00

## 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 'Contents of' area to view the content of the list.
4. 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** to display the results.

**Acme Spring Prices** 📌

Price

Price List Log

---

> **Description**

▼ **Contents of Price**

Product  ← Search

Search result showing 3 terms. All terms are for the same object.

	Object	Value	Min Quantity	Max Quantity	Start Date	End Date
⋮	Pink & Green Pom-...	7.29	1	3	2019-09-01 00:00:00	2019-10-31 00:00:00
⋮	Pink & Green Pom-...	5.49	4	9	2019-09-01 00:00:00	2019-10-31 00:00:00
⋮	Pink & Green Pom-...	2.99	10	100	2019-09-01 00:00:00	2019-10-31 00:00:00
⋮	<a href="#">Add Product</a>					

5. To show the entire content of the list again, remove text from the search field and 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 Publisher commercial data lists that the product is linked to will also display. For more information on commercial data, refer to the Commercial Data topic in the Publisher (Adobe InDesign Integration) documentation.



### Purple & White Party Hat

Item • 6% Complete • Revision: 0.27



Product
Data Containers
Sub Products
References
Referenced By
Images & Documents
Commercial
Tables
Proof ...
<
>

▼ Terms

Terms List ID	Terms List Name	Terms List Type	Owner	Owner Versions	Value	Min Quantity
SummerPrices	Summer Prices	Price	 Summer Weddi...		2.89	1
SummerPrices	Summer Prices	Price	 Summer Weddi...		1.89	4
SummerPrices	Summer Prices	Price	 Summer Weddi...		0.99	10
AcmeSpringPrices	Acme Spring Prices	Price	 Acme Prices		2.89	1
AcmeSpringPrices	Acme Spring Prices	Price	 Acme Prices		1.89	4
AcmeSpringPrices	Acme Spring Prices	Price	 Acme Prices		0.99	10
Summer_Prices	Summer Prices	Price	 eCat		2.89	1
Summer_Prices	Summer Prices	Price	 eCat		1.89	4
Summer_Prices	Summer Prices	Price	 eCat		0.99	10
<span style="color: #00aaff; text-decoration: underline;">Add Term</span>						

It is also possible to edit terms lists from both locations. Refer to the Editing Price Lists topic 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. Refer to 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 'Contents 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 'Contents of' section to view the content of the list.
3. Right-click the first column next to the preferred term, then choose **Edit Term**.

**Acme Spring Prices**  
Price

Price List Log

> **Description**

▼ **Contents of Price**

Product

Showing 19 terms. There are terms for 7 different objects.

	Object	Value	Min Quantity	Max Quantity
⋮	Purple & White Par...	2.89	1	3
⋮	Purple & White Par...	1.89	4	9
⋮	Hide		10	100
⋮	Show All Columns		1	3
⋮	Rotate Table		4	9
⋮	Add Product <small>Ctrl+Plus</small>		10	100
⋮	Remove Product <small>Ctrl+Minus</small>		1	9
⋮	<b>Edit Term</b>			

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

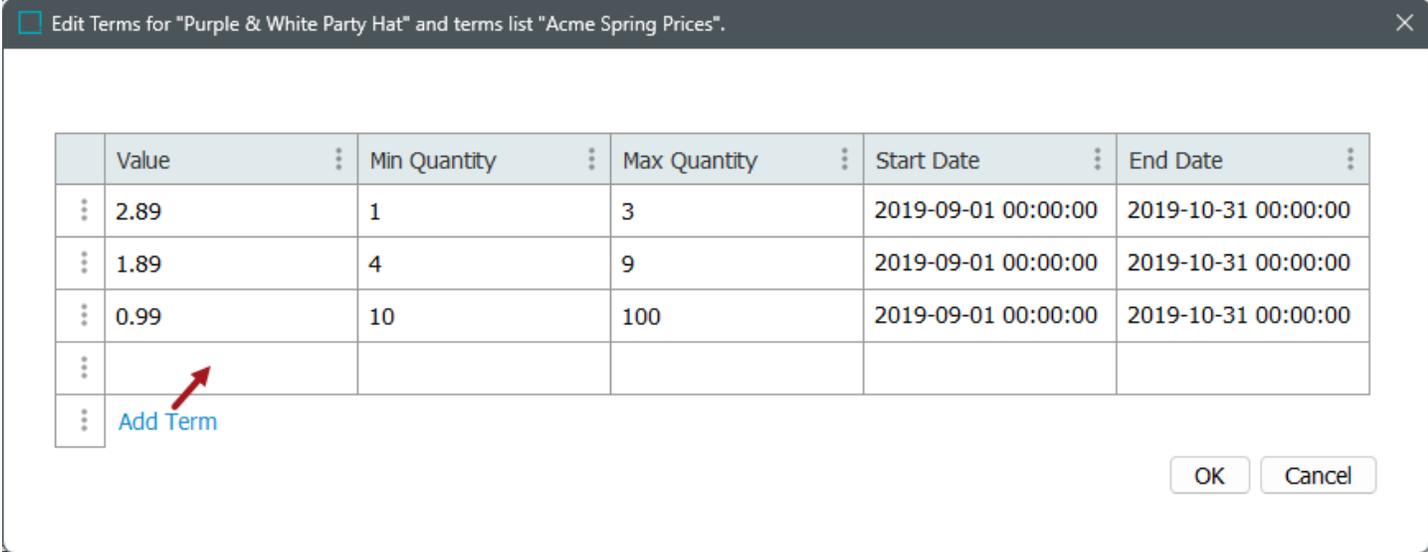
☐ Edit Terms for "Purple & White Party Hat" and terms list "Acme Spring Prices".

	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
⋮	<a href="#">Add Term</a>				

OK Cancel

### Add Terms to a Price List

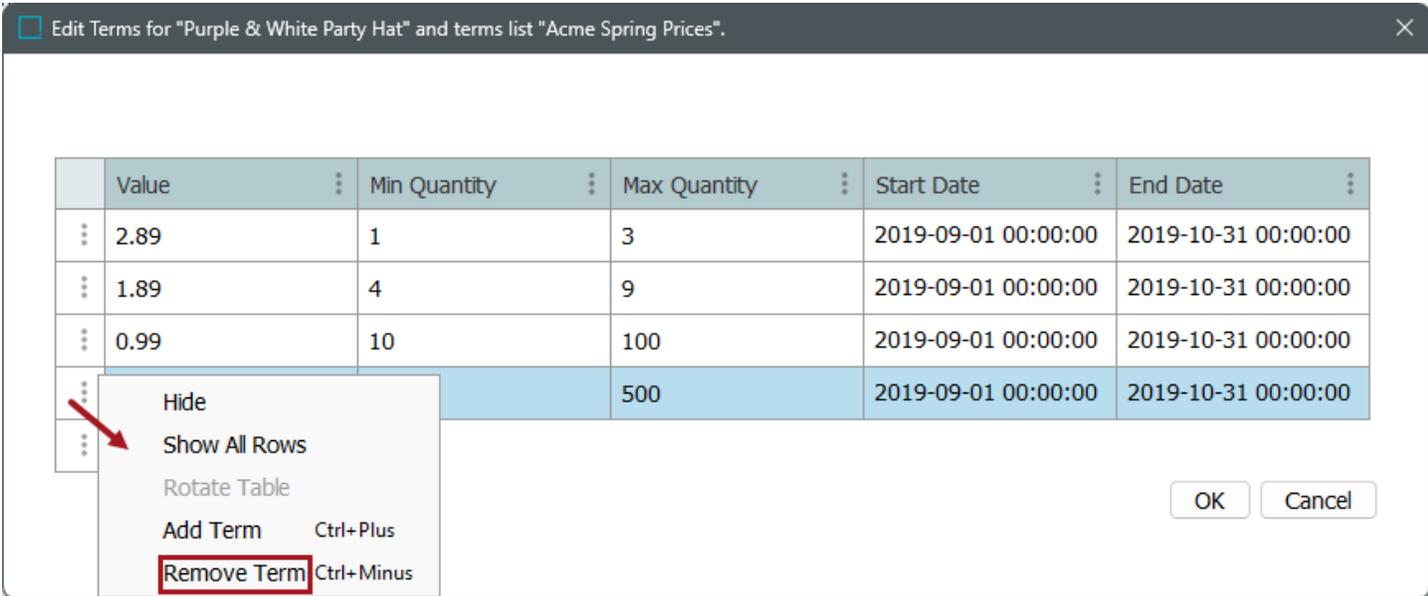
1. Follow the steps outlined above to access the Edit Terms dialog.
2. Click the **Add Term** link to add a new row to the Edit Terms dialog.



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

### Remove Terms from a Price List

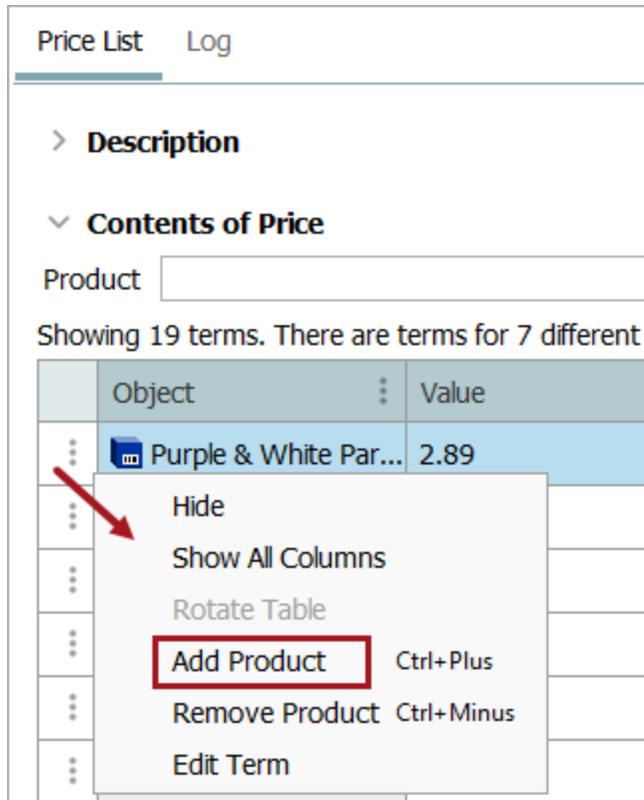
1. Follow the steps outlined above to access the Edit Terms dialog.
2. In the Edit Terms dialog, right-click the first column next to the term you want to remove, then choose **Remove Term**.



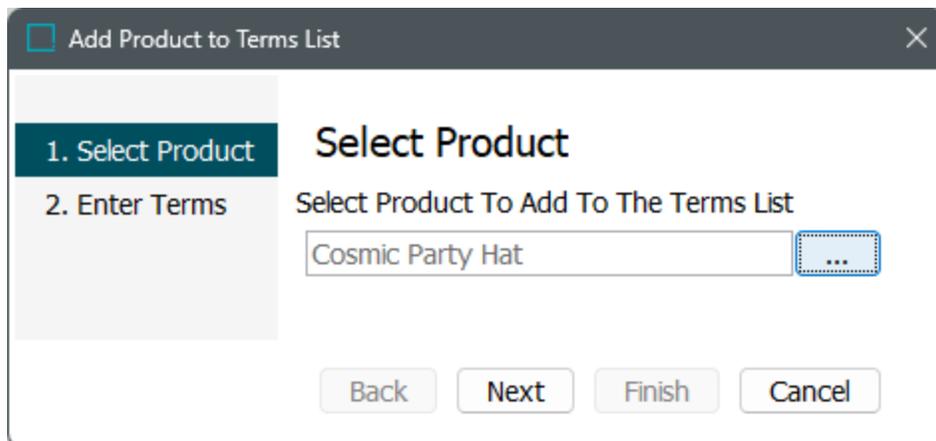
## Add Products to a Price List

Instead of importing products into a price list, you can add products manually, and 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 'Contents of' section to view the content of the list.
3. Right-click the first column 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**.



4. In the 'Add Product to Terms List' dialog, click the ellipsis button (...).



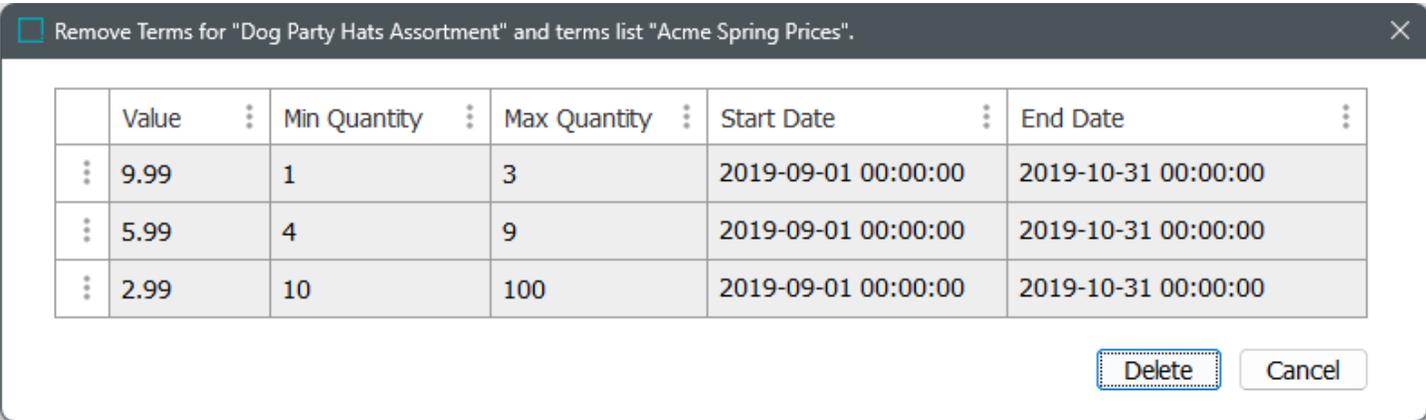
5. Browse to or search for the relevant product on the 'Select Product' dialog, then click **Select**. Only one product can be selected; an option to multi-select products is not available.
6. After selecting the product, click **Next**.
7. In the 'Enter Terms' step, click **Add Term** to add a new blank row to the dialog.
8. 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.



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 first column next to the relevant term, then choose **Edit Term**.



### Purple & White Party Hat

Item • 6% Complete • Revision: 0.27

Product Data Containers Sub Products References Referenced By Images & Documents Commercial Tables Proof ...

▼ **Terms**

	Terms List ID	Terms List Name	Terms List Type	Owner	Owner Versions	Value
⋮	SpringPrices	Spring Prices	Price	Spring Wedding...	English US	2.89
⋮		s	Price	Spring Wedding...	English US	1.89
⋮		s	Price	Spring Wedding...	English US	0.99
⋮		ES	SalesPrices	Acme Party Sup...		€4,79
⋮		Winter ...	Price	Acme Party Sup...	English US	4.79
⋮		ES	Price	Acme Party Sup...	French FR	€3,99

⋮
Hide

⋮
Show All Columns

⋮
Rotate Table

⋮
Add Term
Ctrl+Plus

⋮
Remove Term
Ctrl+Minus

⋮
Edit Term

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

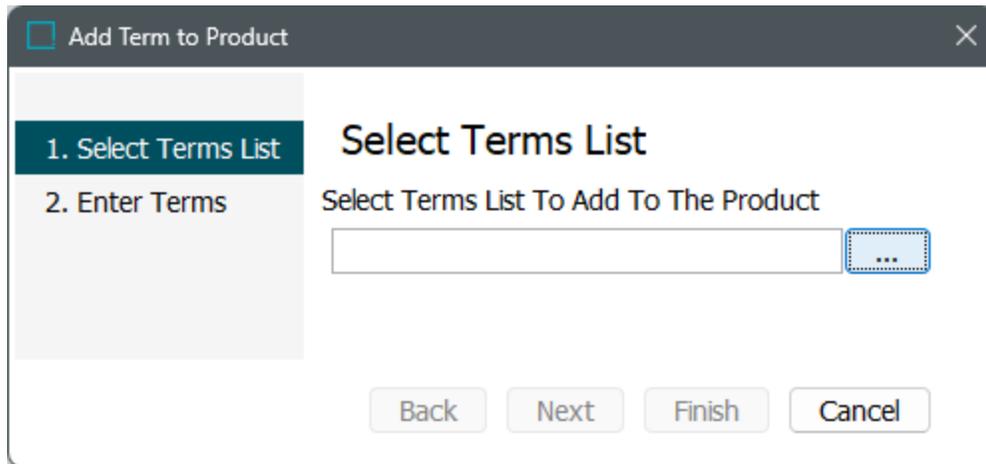
## Add Terms to a Product

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.

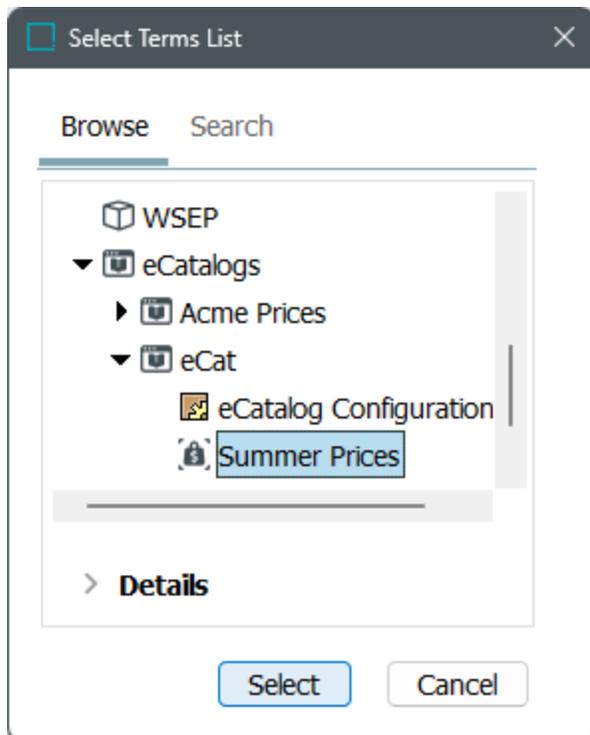
1. In the Tree, navigate to and select the relevant product.
2. On the Commercial tab, expand the Terms area. The content of the lists related to the product is displayed.
3. Click the **Add Term** link at the bottom of the list. Or, right-click on the first column next to any term and select

**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.



- Click **Next** to go to the 'Enter Terms' step, then click the **Add Term** link to add a new row under Enter Terms.

□ Add Term to Product
✕

1. Select Terms List

2. Enter Terms

## Enter Terms

Add Terms To The Selected Terms 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
⋮					
⋮	Add Term				

Back Next Finish Cancel

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 first column next to the preferred term, then choose **Remove Term**.

## Remove All Terms from a Product

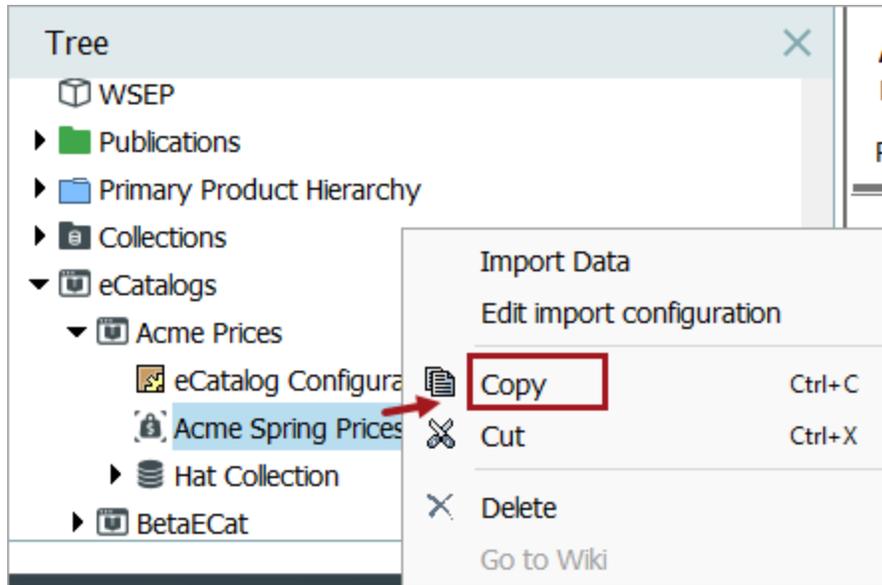
Removing all terms from a product will remove the product itself from the terms list.

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 first column 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.

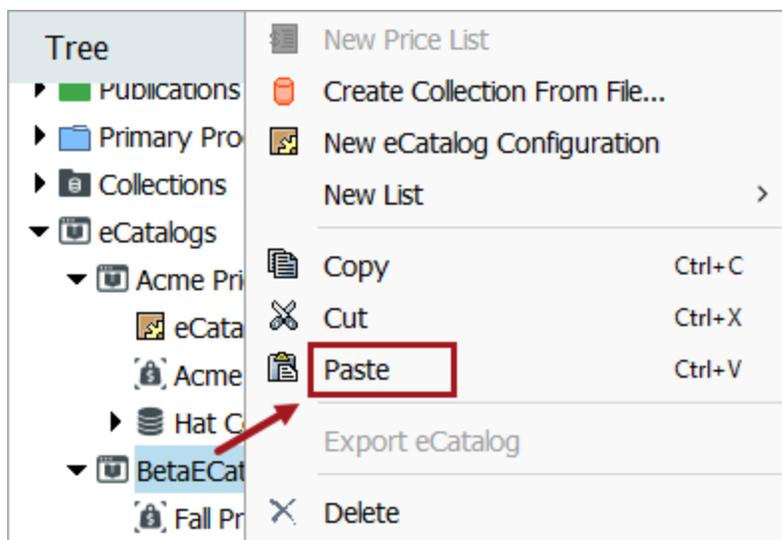
# Copying Price Lists

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 Publisher publications to use as commercial data lists. For more information on Commercial Data, refer to the Commercial Data topic of the Publisher (Adobe InDesign Integration) documentation.

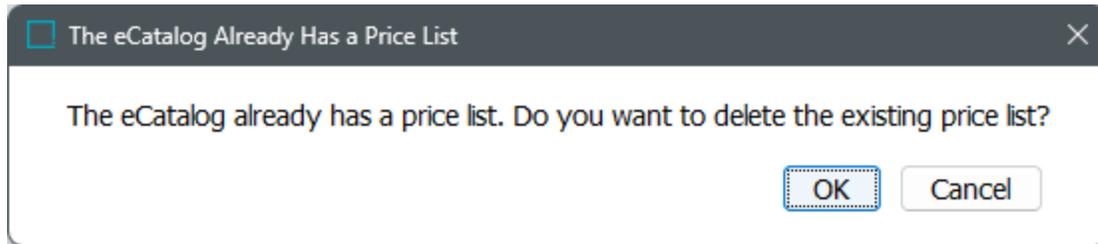
1. Navigate to the price list that you want to copy, then right-click and choose **Copy**.



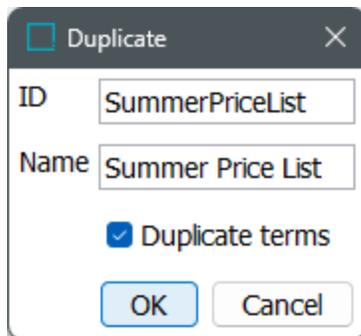
2. Navigate to and select the eCatalog that you want to copy the list to, then right-click and choose **Paste**.



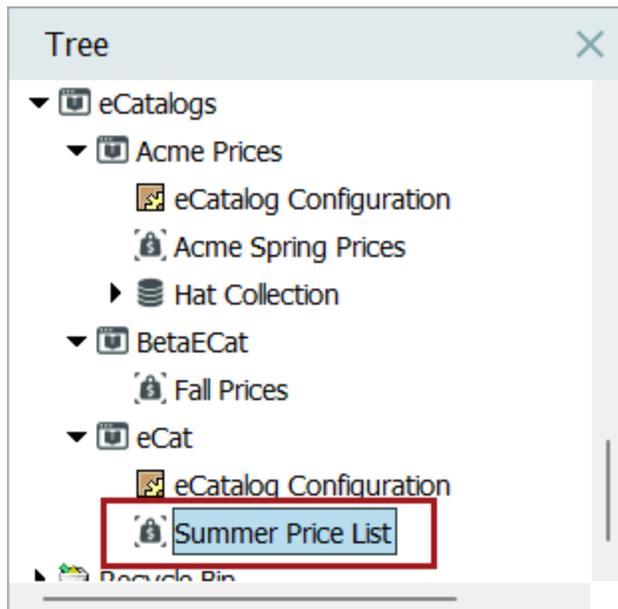
- If the eCatalog already has a list, a warning dialog will display to let you know that the existing price list will be deleted when you paste the new one. Click **OK** to continue and overwrite the price list, or click **Cancel** to exit.



- 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:

- Use the contents of the price list itself, which is achieved by selecting the 'Act as selection list' on the price list. Refer to the Creating a Price List topic for more information.
- 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, refer to the Creating Collections topic in the Getting Started documentation.

**Note:** It is strongly recommended to use a dynamic collection created from a search, since this collection can be refreshed every time the eCatalog is exported.

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 .

Advanced Search
✕

Object Type = Product
✕

Search ▾
✕

> **Advanced**

+ ▾

Reset

Search

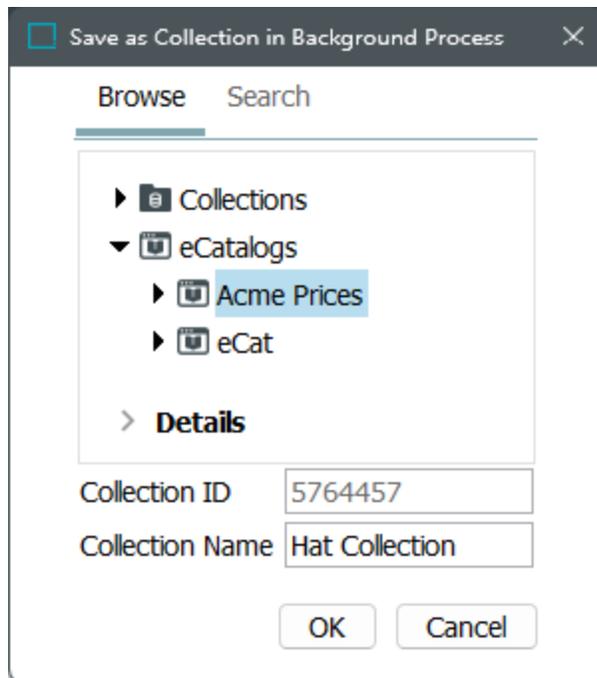
Displaying 46 of 46 results
[Show Details](#)

Name

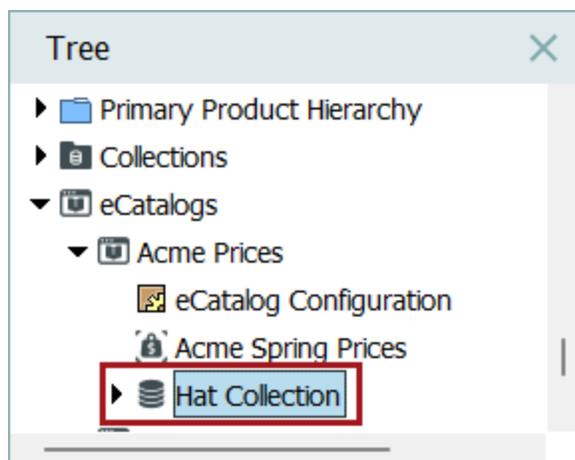
📄 1st Birthday Hat (186822)
📄 1st Birthday Hat (187854)
📄 1st Birthday Hat (187853)
📄 1st Birthday Hat (187852)
📄 1st Birthday Hat (187851)

↓
Operations on Entire Result

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



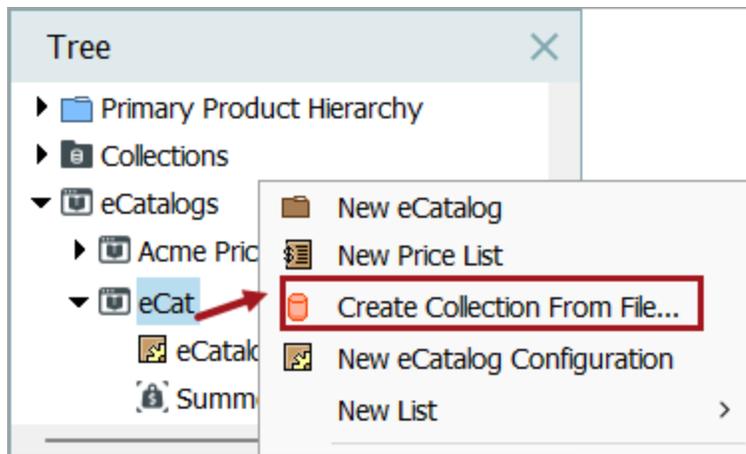
4. For the 'Collection Name' parameter, add a Name for the new collection (IDs are autogenerated).
5. A background process launches. When complete, the collection is added to the eCatalog.



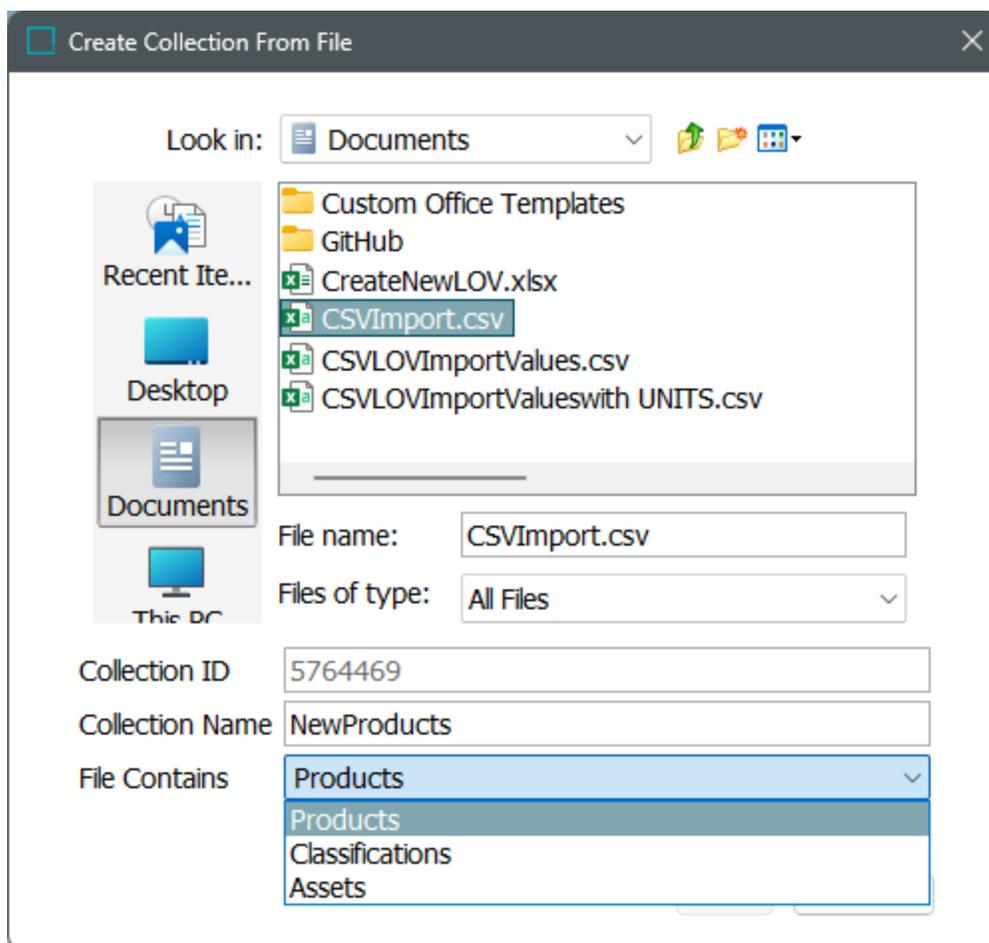
## Add a Static Collection to an eCatalog Through a File

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.



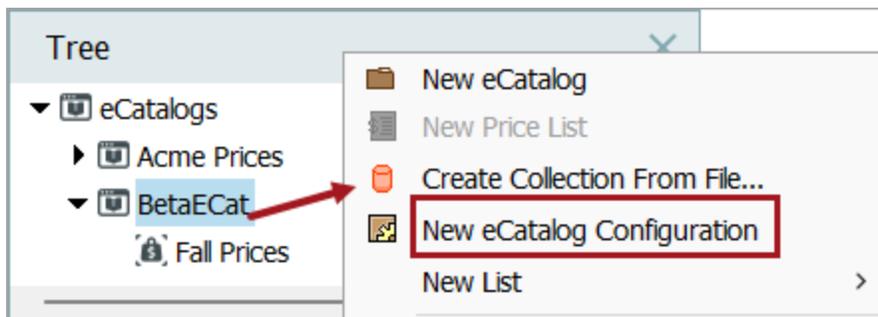
3. For the Collection Name parameter, add a Name for the new collection (IDs are autogenerated).
4. For the File Contains parameter, select if the import file contains IDs of products, classifications, or assets.
5. Click **OK** to start a background process which will create the new collection.

# Creating and Editing 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**.

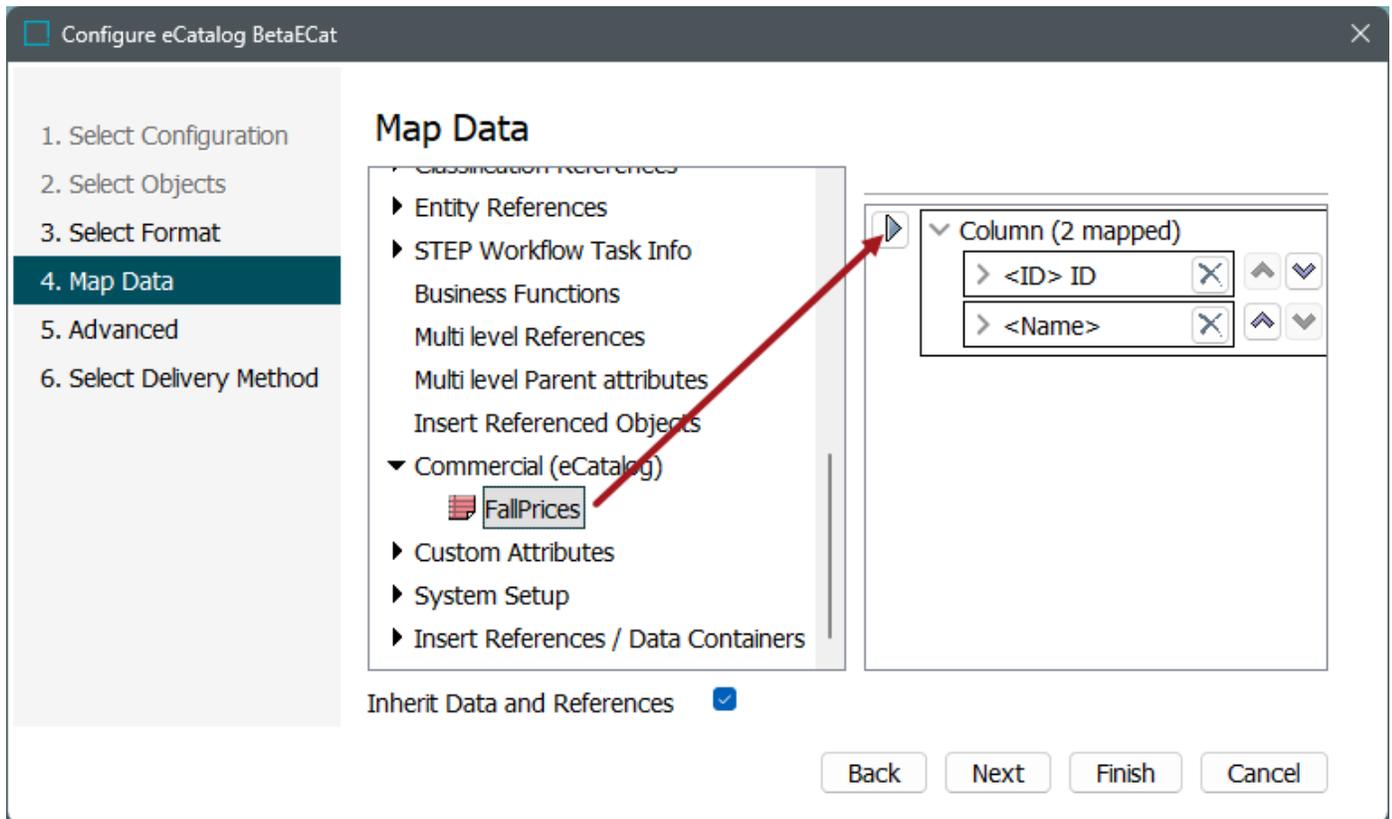


2. The 'Configure eCatalog' wizard displays on the 'Select Format' step. The Configure eCatalog wizard is based on the Export Manager with added functionality, allowing you to map the prices from the price list information of the current eCatalog into the selected output format. You can choose among the following eCatalog formats, which are supported via export options (each is described in the Data Exchange documentation):
  - Excel Format: Files always include a header row and rows for data.
  - BMEcat Format: BMEcat 1.2 is an XML-based standard for electronic data transfer by electronic catalogs.
  - BMEcat 2005 Format: An XML-based standard for electronic data transfer by electronic catalogs.
  - Ariba CIF 3.0 Format: A simple comma-delimited list of catalog items and their attributes.
  - cXML Format: Exports data using Ariba cXML 1.2 and is an XML-based language designed specifically for communication of e-commerce business documents.
  - xCBL Format: Exports data using the CommerceOne XML-based language.

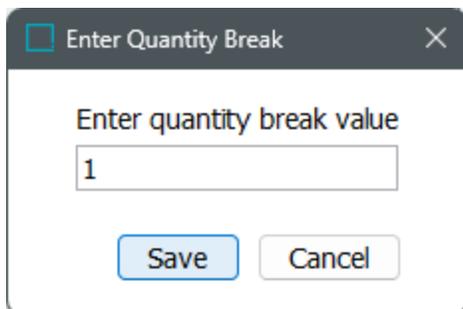
## Configure an eCatalog Configuration for Excel

1. On the 'Configure eCatalog' wizard 'Select Format' step, select **Excel** from the dropdown list, then click **Next**.
2. On the 'Map Data' step, click on the relevant information that you want included in the export (for instance, <ID> and <Name>), then click the arrow button on the right side 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.

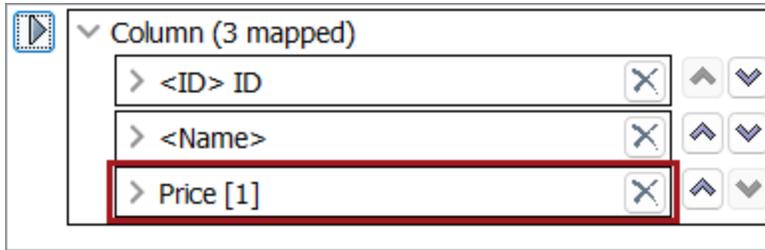
- To map the required price data, expand 'Commercial (eCatalog)', select the relevant price list (in this example, 'FallPrices'), then click the arrow button to add it as a column in the Excel sheet.



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

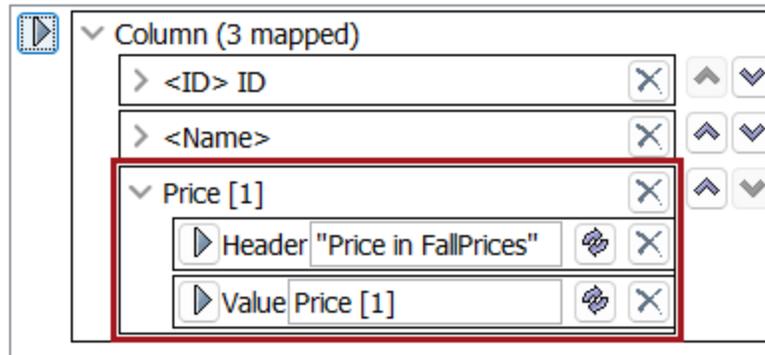


- The price value is mapped, followed by the break number in brackets, e.g., [1].

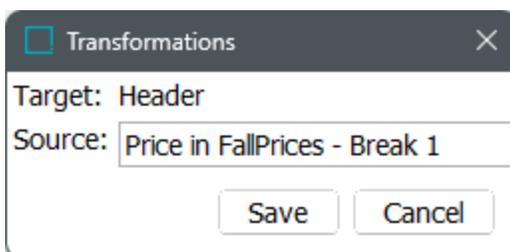


- To apply transformations to the values that display in the export, expand the Price row to view the fields that allow transformations via the transformation button (🔗). When mapping a commercial value, the same transformations are available for a product attribute, but the available aspects differ.

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



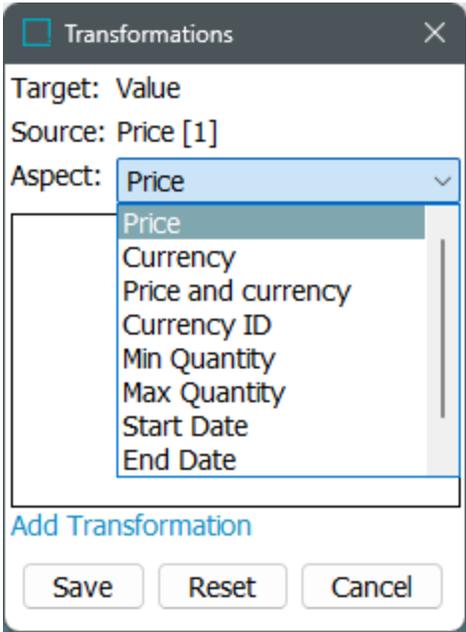
- In the Header field, click the transformation button (🔗) to change the header that will display in the Excel export spreadsheet for the price value. In the 'Transformations' dialog, enter the desired header in the 'Source' field, then click **Save**.



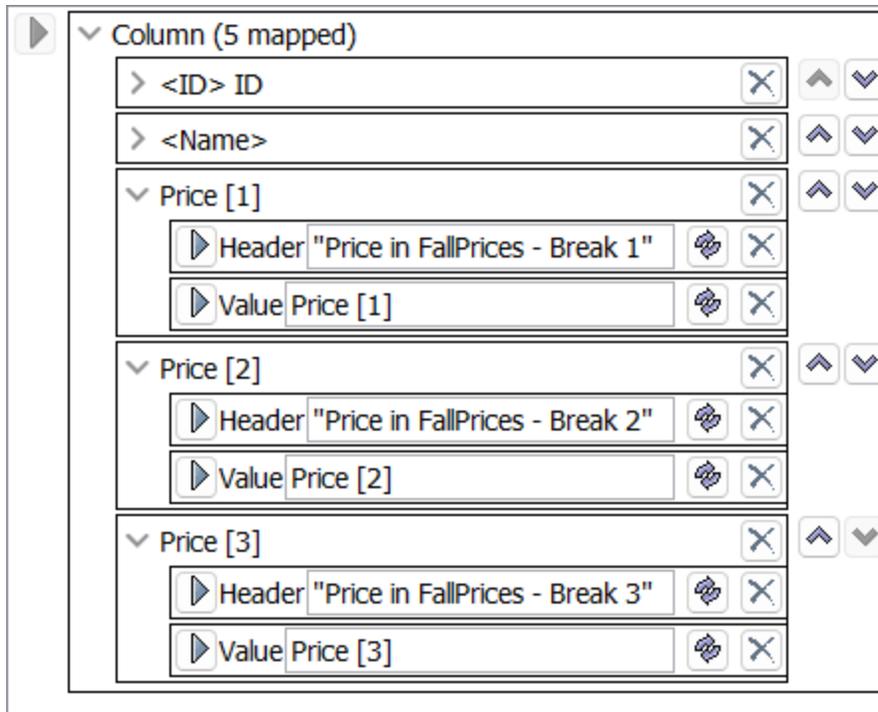
**Note:** If the header is not changed, then the header in the Excel sheet will be the same for all price breaks, e.g., 'Price in FallPrices.' As such, it is recommended to customize the header for each break, for example, 'Price in FallPrices - Break 1.'

8. In the Value field, click the transformation button (  ) to apply a transformation to the values that display in the price columns. The following Aspect 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



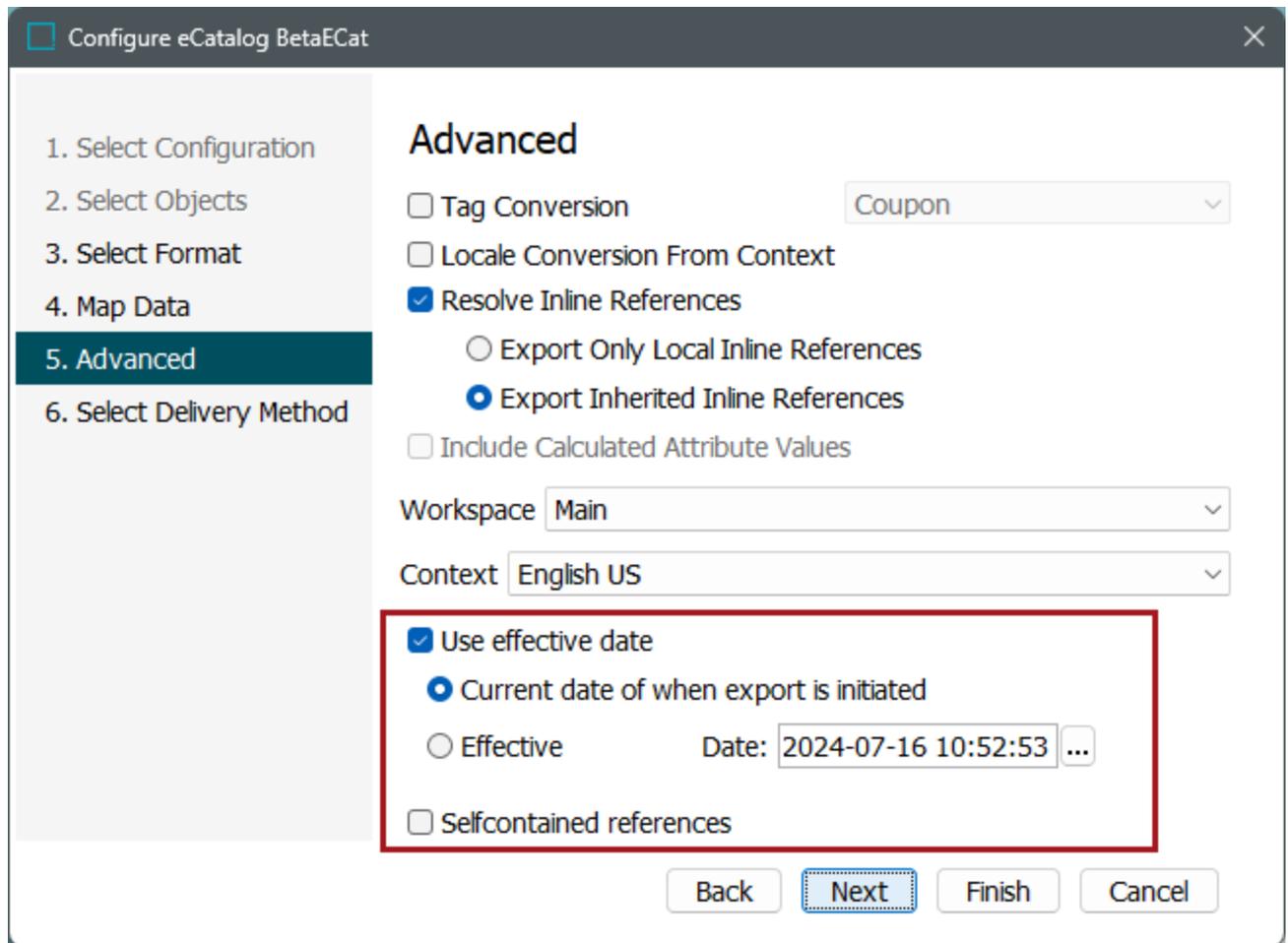
9. Repeat the process to map values from additional price breaks. The following image shows a sample mapping with ID, Name, and three price breaks with transformations applied:



10. Click **Next** on the 'Map Data' step when finished.

11. On the 'Advanced' step:

- For information on the standard options available on this step, refer to the Export Manager - Advanced topic in the Data Exchange documentation.
- Additional options specific to eCatalog exports are highlighted in the below image.



Configure eCatalog BetaECat

- Select Configuration
- Select Objects
- Select Format
- Map Data
- Advanced**
- Select Delivery Method

### Advanced

Tag Conversion Coupon

Locale Conversion From Context

Resolve Inline References

Export Only Local Inline References

Export Inherited Inline References

Include Calculated Attribute Values

Workspace Main

Context English US

Use effective date

Current date of when export is initiated

Effective      Date: 2024-07-16 10:52:53 ...

Selfcontained references

- **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, specify one of the following options:

- **Current date of when export is initiated:** Select 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.
- **Effective:** Select 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' step.
13. Select **File**, then click **Finish**.

## Configure an eCatalog Configuration for BMEcat

For full details on configuring all of the information required for a BMEcat export, refer to the BMEcat Format topic of the Data Exchange documentation.

1. On the Configure eCatalog wizard 'Select Format' step, select **BMEcat** from the dropdown.
2. Fill out any relevant fields on the step, then click **Next**.
3. On the 'Map Data' step, 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 button next to **Price** to add it as a column in the Excel sheet.

**Map Data**

Select Attribute

- ▶ Classifications
- ▶ Index Words
- ▶ Product Classification Links
- ▶ Product References
- ▶ Asset References
- ▶ Classification References
- ▶ Entity References
- ▶ STEP Workflow Task Info
- Business Functions
- Multi level References
- Multi level Parent attributes
- Insert Referenced Objects
- ▼ Commercial (eCatalog)
  - FallPrices**
  - ▶ Custom Attributes
  - ▶ System Setup
  - Attributes Inherited from Classification

Inherit Data and References

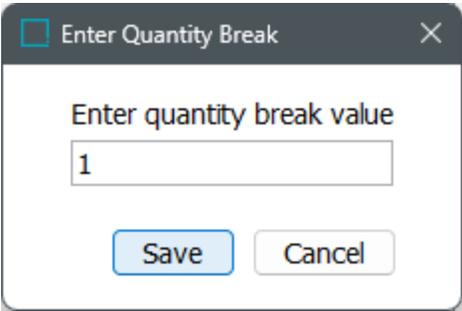
Converts data to a BMEcat 1.2 format (see [www.bmecat.org](http://www.bmecat.org)).

▶ Reference Feature Group Name	Nothing mapped	⚙	✕
▶ 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)			

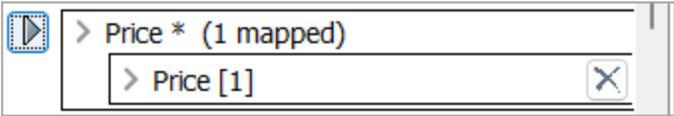
\* = Mandatory field    Red = Unmapped mandatory field

Back    Next    Finish    Cancel

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

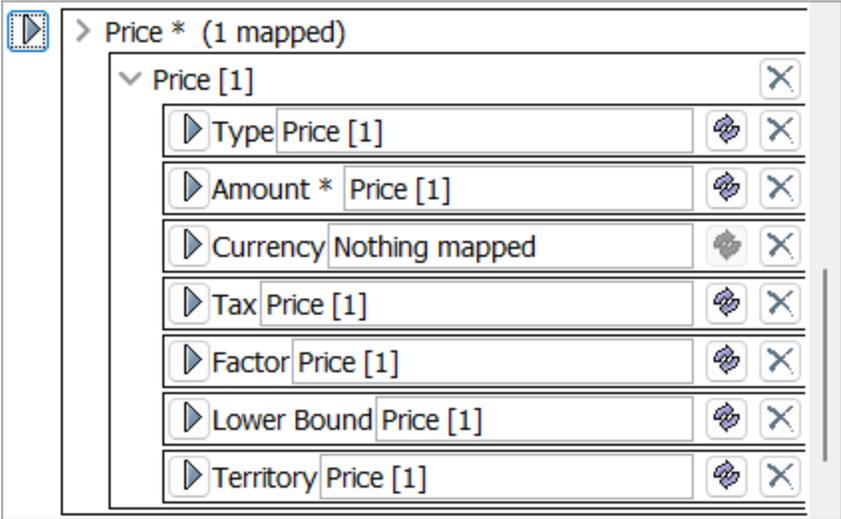


6. The price value is mapped, followed by the break number in brackets, e.g., [1].



7. To apply transformations to the values that display in the export, expand the Price row to view the fields that have the transformation button (🔗) available. When mapping a commercial value, the same transformations are available as 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. Refer to the above subsection, 'Configure an eCatalog Configuration for Excel,' for more information.

For more information on applying aspect transformations to outbound data, refer to the Aspect - Transform Outbound topic in the Data Exchange documentation. For a broader overview on applying transformations to outbound data, refer to 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' step when finished.
9. On the 'Advanced' step, 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 step, refer to the Export Manager - Advanced topic in the Data Exchange documentation.

The additional options for eCatalogs are the same as those available for Excel exports (User effective date, etc.). Refer to the above [Configure an eCatalog Configuration for Excel](#) section for more information.

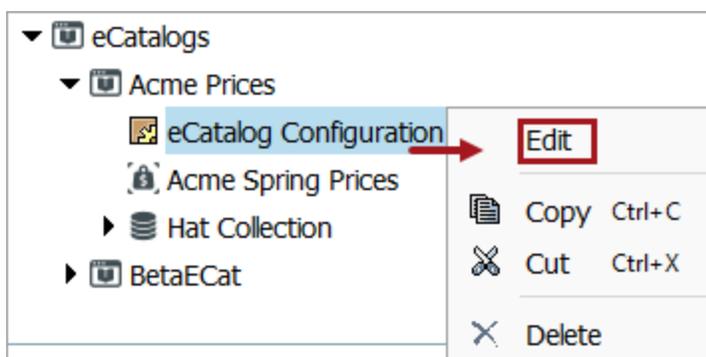
10. Click **Next** to advance to the 'Select Delivery Method' step.
11. Select **File**, then click **Finish**.

## 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' step 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' step.

## Editing an eCatalog Configuration

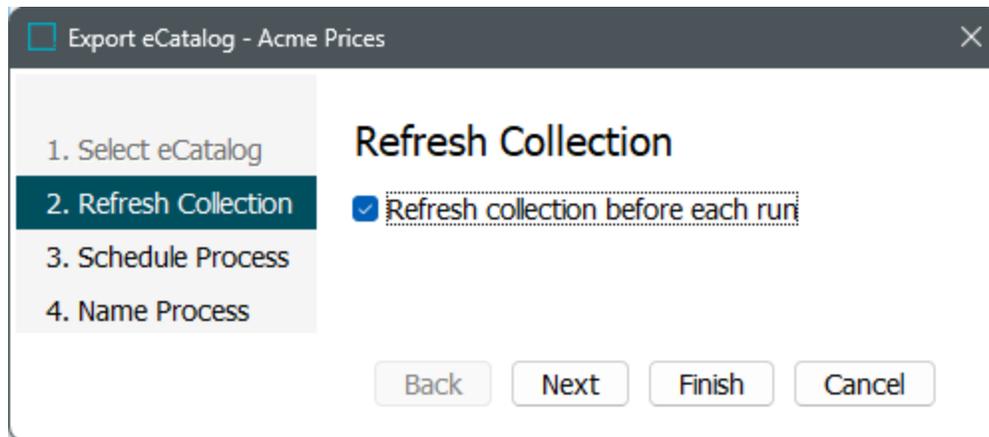
1. To edit an eCatalog Configuration, right-click the configuration and select **Edit**.



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

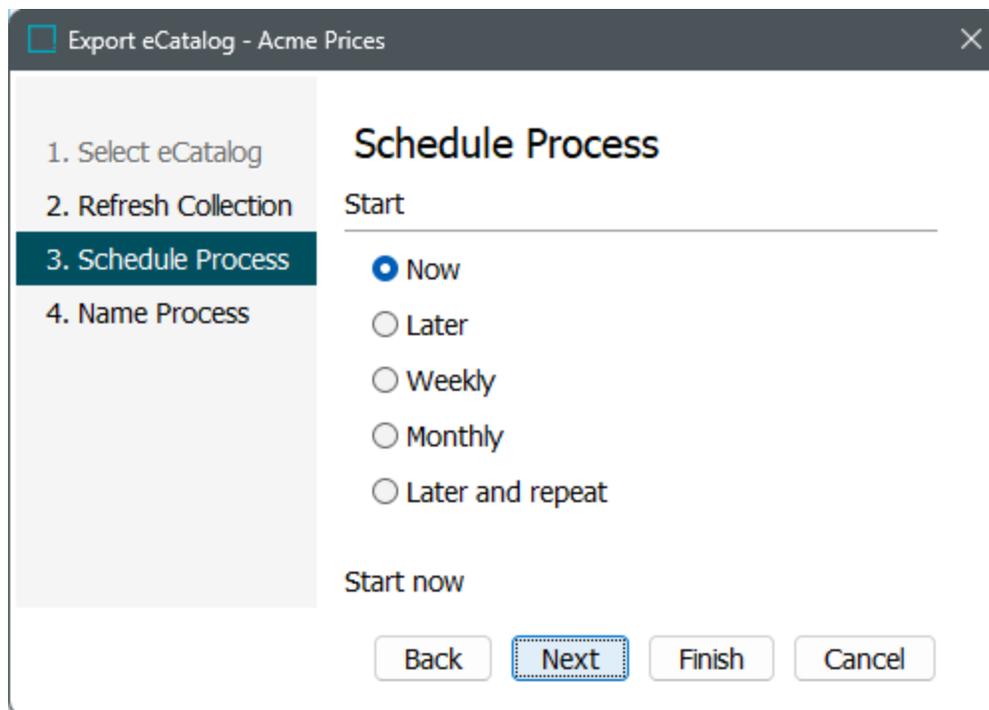
## Exporting an eCatalog

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.

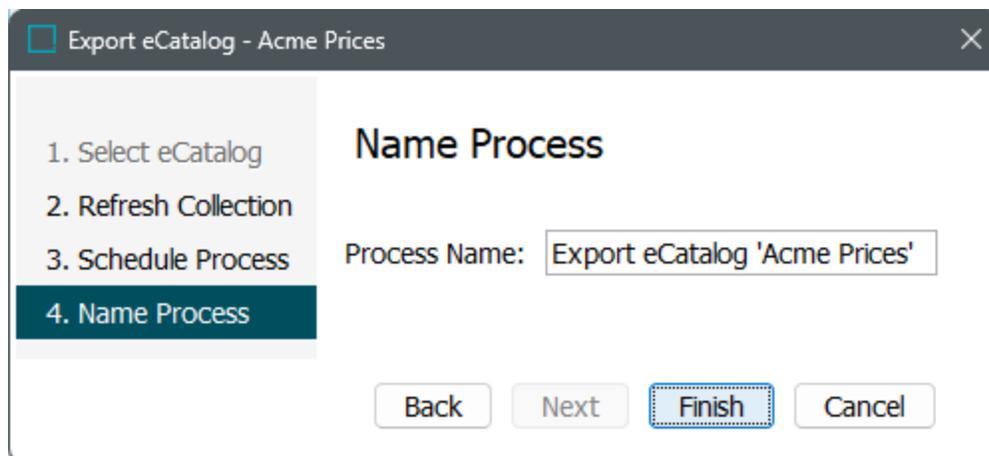


3. On the Schedule Process step, specify whether you want to export the eCatalog immediately or at a specified time in the future, then click **Next**. You have the following options:
  - **Now:** Starts the eCatalog Export process and delivers the eCatalog as specified in the eCatalog Configuration.
  - **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.