

COMMERCIAL DATA USER GUIDE

The logo for StiboSystems, featuring the company name in a white sans-serif font. The 'i' in 'Stibo' has a small double-dot icon above it. The logo is positioned on the left side of the page, partially overlapping a large orange triangle that points towards the right.

StiboSystems

STEP Trailblazer 8.2

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Introduction

The STEP Commercial Data User Guide contains information about using commercial data in STEP.

The guide assumes the following:

- That users have a working knowledge of STEP
- That publications have already been created in STEP

The guide only contains information about STEP commercial data. For more information about STEP and publications, see the STEP User Guide and the Online Help.

Commercial Data

Prices and sales information is commercial data that you can tie to an individual publication.

Use commercial data to:

- store data that is to be published in a specific publication
- enable users to make informed decisions about how to present a product in a specific publication

Commercial data consists of **terms**. A term is related to a product and is a combination of a value and a set of conditions such as Minimum Quantity, Maximum Quantity, Start Date and End Date.

The following is an example of an Excel import file for commercial data.

Product	Price	Min Qty	Max Qty	Start Date	End Date
EXE-1002-1004	119	1	5	2016-01-15 12:15:40	2017-02-16 13:15:40
EXE-1002-1004	112	6	10	2016-01-15 12:15:40	2017-02-16 13:15:40

Commercial Data Privileges and Actions

Commercial data is controlled by privileges, and the following actions are available.

Action	Description
View commercial data	Users can only view commercial data. They cannot make changes.
Delete commercial list	Users are able to delete commercial lists.
Create commercial list	Users are able to create commercial lists, but they cannot maintain data in

Action	Description
	commercial lists.
Maintain commercial list	Users are able to maintain data in commercial lists.
Freeze/Thaw commercial list	This action prevents commercial lists from being updated.

Defining Import Settings for Commercial Data

The Import Manager wizard is used to define the settings that are used to import commercial data information into a commercial list. However, unlike standard Import Configurations, the Import Configurations created for commercial data may only be created and saved on **publication** objects.

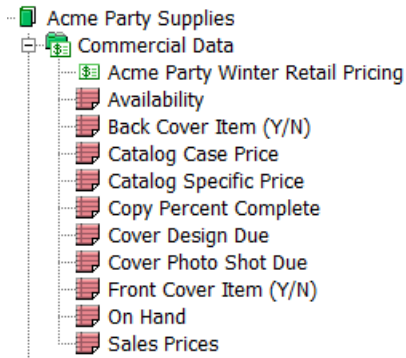
1. In the **Tree**, expand the **Publication** hierarchy, and then click the relevant publication.
2. On the **Publication** tab, in the **Import Configurations for Commercial Data** area, click **Create Import Configuration**. The **Import Manager** wizard displays.

The wizard consists of 7 steps. All steps are described in detail in the **Creating a Data Import**. The following only contains detailed descriptions of the steps that are of particular importance to commercial data.

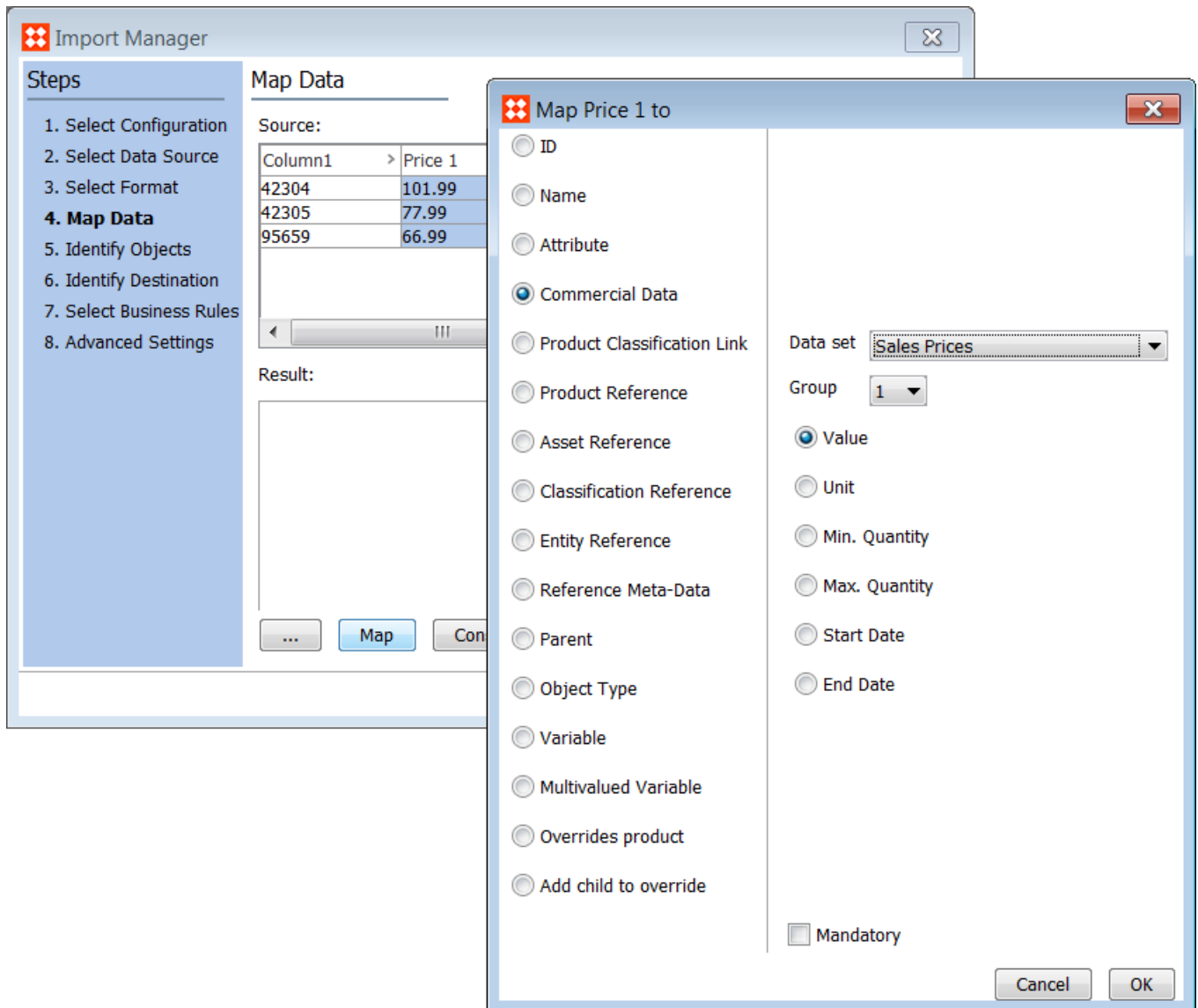
3. Go through steps 1-3 of the wizard.
 - Step 1: **Select Configuration**. Specify whether you want to create a new import configuration or use an existing one.
 - Step 2: **Select Data Source**. Select the data source. This will always be **File**.
 - Step 3: **Select Format**. Select the type of file you are importing and specify some basic file parameters.

Note: The format for commercial data must always be either **Excel** or **CSV**, as manual mapping of columns is required for commercial data imports.

4. In step 4 of the wizard, **Map Data**, click a source column, and then click **Map**. The **Map Column to** dialog appears.
5. Select **Commercial Data**. A list of options appears:
 - From the **Data Set** list, select the commercial list to which the data should be mapped. Every commercial list in your publication will appear in the **Data set** dropdown list in alphabetical order. Values for multiple commercial data lists may be populated from a single Excel sheet.



- From the **Group** list, select the preferred quantity break.
- Select **Value** to map the column to price values.
- 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.
- Select **Mandatory** if all cells in an imported file must contain a value.



6. Click **OK**. Go through step 4 as many times as needed to map all required columns.
7. Go through steps 5-7 of the wizard.
 - Step 5: **Identify Products**. Optionally, specify whether products in the source file are new or existing. Also, specify whether the system should locate products by attribute value rather than by product ID or name.
 - Step 6: **Identify Destination**. Optionally, select Reject New Products if you want to ensure that new products are not imported into the STEP system.
 - Step 7: **Select Business Rules**. Optionally, specify rules for rejecting objects, and actions to be executed for valid objects.
8. In step 7 of the wizard, **Advanced Settings**, in the **Replace/Update Options** area under **Replace/Update Options**, you have 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 the content of the entire 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, including new product IDs, select **Only update commercial data for products included in import file**.

The screenshot shows the 'Import Manager' dialog box with the 'Advanced Settings' tab selected. The 'Steps' pane on the left lists eight steps, with '8. Advanced Settings' highlighted. The main area contains the following settings:

- Context:** English US (dropdown)
- Import Process Template:** Importer (dropdown)
- Match Units By:** Name (dropdown)
- Approve Import Changes:** ☐
- Auto-Initiate STEP Workflows on Item Creation:** ☒
- Trigger STEP Workflow import events on Item Updates:** ☐
- Suppress Re-Translations:** ☐
- Replace/Update Options:**
 - Replace/Update Terms:**
 - ☐ Replace entire existing list(s) with content of import file
 - ☒ Only update commercial data for objects included in import file
- Remove Options:**
 - Remove Un-Mapped Values:**
 - Attribute Group >
 - > [Select Attribute Group\(s\)](#)
 - Remove Un-Mapped References:**
 - ☐ Classification References
 - Product Reference ... >
 - > [Add Product Reference Type](#)
 - Asset Reference Type >
 - > [Add Asset Reference Type](#)
 - Entity Reference Type >
 - > [Add Entity Reference Type](#)
 - Classification Produ... >
 - > [Add Classification Product Link Type](#)

At the bottom right, there are four buttons: 'Back', 'Next', 'Finish' (highlighted with a blue border), and 'Cancel'.

9. Click **Finish** to complete the wizard. The **Create Import Configuration** dialog appears.
10. In the **Configuration Name** field, enter a name for the import configuration, and then click **OK**.

When you have completed the import configuration process, the configuration is available from the **Publication** tab in the **Import Configurations for Commercial Data** area.

To Edit an Import Configuration

If you want to make changes to an existing import configuration do the following.

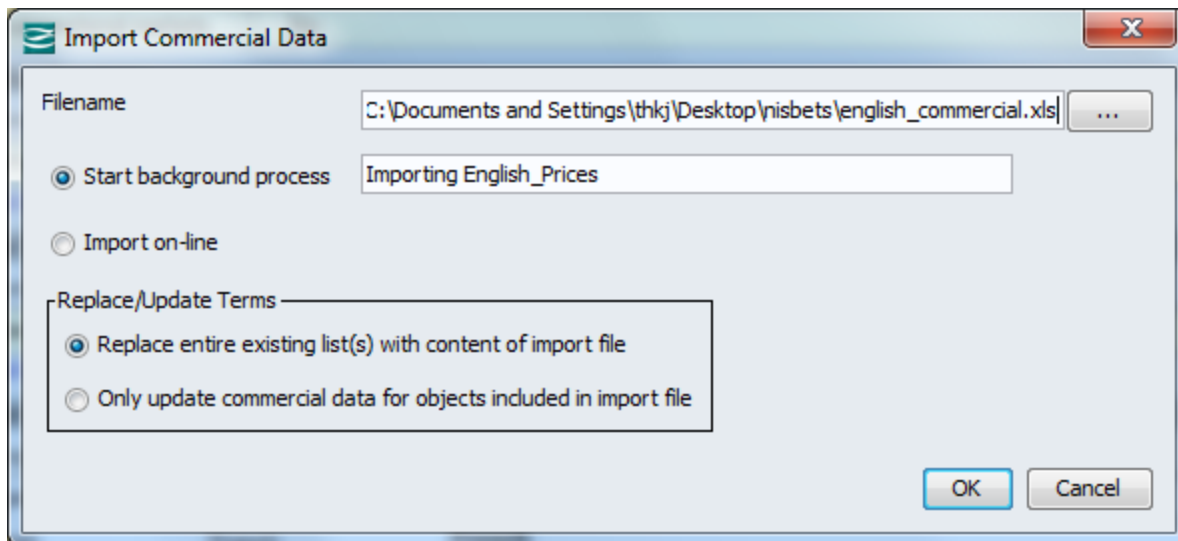
1. In the **Tree**, select the relevant publication, and then click the **Publication** tab.
2. In the **Import Configurations for Commercial Data** area, select and right-click the relevant list, and then choose **Edit Import Configuration**.

Importing Commercial Data

When a commercial list has been created and import settings defined for the list, the commercial data can be imported into the system.

Note: This topic details how to import commercial data in the workbench. For information on importing commercial data in the Publishing Web UI, see **Working with Commercial Data in the Publishing Web UI** in the **Web User Interfaces** documentation.

1. In the **Tree**, expand the **Publication** hierarchy, and click the relevant publication, and then click the **Publication** tab.
2. In the **Import Configurations for Commercial Data** area, right-click the arrow next the relevant import configuration, and then choose **Import Data**. The **Import Commercial Data** dialog appears.



3. In the **Filename** field, click the ellipsis points (...), and then navigate to and select the file you want to import.
4. In the **Replace/Update Terms** area, you 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 the content of the entire 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, including new product IDs, select **Only update commercial data for products included in import file**.

Note: This option is set in the Import Data Wizard, but you can override the settings here.

3. Click **OK**.

To Prevent Commercial Data from Being Updated

Optionally, when the file has been imported, you can prevent the commercial data from being updated.

- In the **Tree**, select the preferred commercial list, click the **Price** tab, and then select the Immutable field.

To Specify an Expiration Date

- On the **Price** tab, double-click the **Expiry** date field, and then enter an expiration date.

Note that the commercial list will not expire automatically. The date is for administrative purposes only.

Creating Commercial Lists

Commercial data provides access to information about past sales, current inventory levels, and previous placement of a product in a catalog. As a result, you can assign products to a catalog based on commercial facts such as sales performance, sales forecast and margins. To view commercial data, you must first create a commercial list.

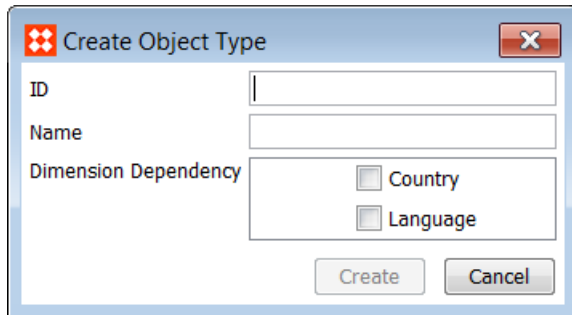
You can create as many commercial lists as you need. The commercial lists are used to hold pricing time information for output or commercial information such as sales figures and profit margins.

You can import commercial data from your ERP or sales systems.

Before you can create a commercial list, the related object type must be created in System Setup. The following description guides you through the process of creating the object type and creating the commercial list itself.

To Create an Object Type for Commercial Lists

1. In **System Setup**, expand the **Object Types & Structures** hierarchy.
2. Click **Commercial Types**, then right-click and choose **New Object Type**. The **Create Object Type** dialog appears.



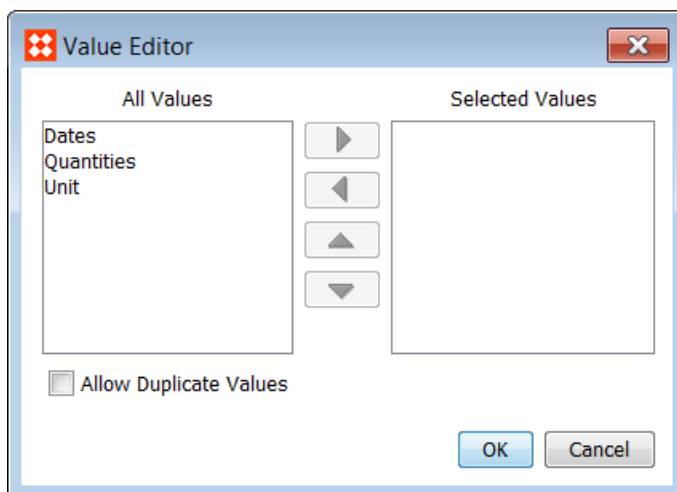
The 'Create Object Type' dialog box contains the following fields and controls:

- ID**: A text input field.
- Name**: A text input field.
- Dimension Dependency**: A container with two checkboxes:
 - ☐ Country
 - ☐ Language
- Create**: A button.
- Cancel**: A button.

3. In the **ID** field, enter an ID for the object type.
4. In the **Name** field, enter a name for the object type.
5. Select the relevant dimension dependency, and then click **Create**.

Next, you have to specify the fields that are displayed when commercial data is being viewed either on the commercial list itself or on the commercial tab of a product.

6. On the **Object Type** tab, double-click the column next to the **Visible term-fields** field. The **Value Editor** appears.



The 'Value Editor' dialog box contains the following elements:

- All Values**: A list box containing 'Dates', 'Quantities', and 'Unit'.
- Selected Values**: An empty list box.
- Four arrow buttons (right, left, up, down) between the two list boxes.
- ☐ Allow Duplicate Values
- OK**: A button.
- Cancel**: A button.

7. Select the relevant value, and then click the right arrow button to add it to the list. Repeat the step to add more values, and then click **OK**.
8. On the **Object Type** tab, double-click the column next to the **Allow Overlapping Terms** field, and then select **Yes** or **No** from the list.

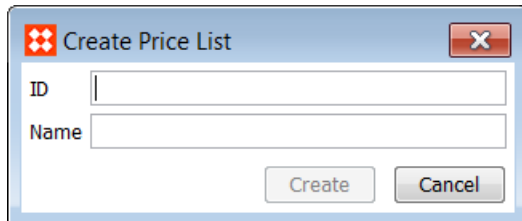
The default setting is **No**. This means that a product can have only one unique price for any given data interval and quantity in the commercial list. However, in some cases it can be useful to allow overlapping terms, and you then change the setting to Yes.

In the travel market, for example, the same holiday package can be offered from Monday to Monday and from Friday to Friday. The weekend then overlaps.

To Create a Commercial List

Now that the object type has been created, you can create the actual commercial list.

1. In the **Tree**, expand the Publication hierarchy, and then expand the relevant publication.
2. Click **Commercial Data**, right-click, point to **New List**, and then choose the preferred type of commercial list. The **Create Price List** dialog is displayed.



The 'Create Price List' dialog box is shown. It has a title bar with a red 'X' button. Inside, there are two text input fields: 'ID' and 'Name'. Below the fields are two buttons: 'Create' and 'Cancel'.

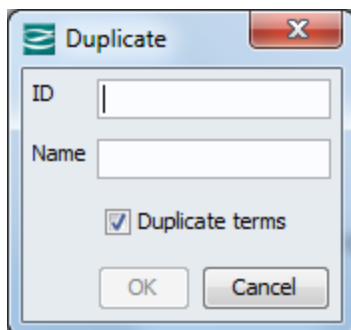
3. In the **ID** field, enter an ID for the commercial list.
4. In the **Name** field, enter a name for the commercial list, and then click **Create**.

When the list has been created, you can define settings for the import of commercial data. For more information, see **Defining Import Settings for Commercial Data** in the **Flatplanner** documentation.

Copying Commercial Lists

You can make a copy of a commercial list and use it as a commercial list in a different publication. You can also copy commercial lists to e-catalogs.

1. In the **Tree**, expand the **Publications** hierarchy, click the relevant publication, and then expand **Commercial Data**.
2. Right-click the commercial list you want to copy, and then choose **Copy**.
3. Locate the publication that you want to copy the list to, and then select the **Commercial Data** folder of the publication.
4. Right-click the folder, and then choose **Paste**. The **Duplicate** dialog box appears.



The 'Duplicate' dialog box is shown. It has a title bar with a red 'X' button. Inside, there are two text input fields: 'ID' and 'Name'. Below the fields is a checkbox labeled 'Duplicate terms' which is checked. At the bottom are two buttons: 'OK' and 'Cancel'.

5. In the **ID** field, enter an ID for the list, and in the **Name** field, enter a name for the list.
6. Select **Duplicate** terms if you want to copy the actual terms of the list.

7. Click **OK**.

Editing Commercial Data

You can edit commercial data from a commercial list or from a product.

Note: This topic details how to edit commercial data in the workbench. For information on editing commercial data in the Publishing Web UI, see **Working with Commercial Data in the Publishing Web UI** in the **Web User Interfaces** documentation.

To Edit Commercial Data from a Commercial List

1. In the **Tree**, expand the publication hierarchy, click the relevant publication, and then expand the **Commercial Data** hierarchy.
2. Click the relevant commercial list, and then click the **Price List** tab, and verify that the Immutable box is not checked. If checked, you cannot make edits.
3. Click the **Flipper** icon  next to **Contents of <Name of commercial list>**. A table is displayed that contains the products and their terms.
4. Right-click the right arrow next to the preferred term, and then choose **Edit Term**. The **Edit Terms** dialog appears.
5. Make the preferred changes, and then click **OK**.

To Add Terms to a Commercial List

1. Complete steps 1-4 as described above.
2. In the **Edit Terms** dialog, click **Add Term**, enter the relevant terms, and then click **OK**.

To Remove Terms from a Commercial List

1. Complete steps 1-4 as described above.
2. In the **Edit Terms** dialog, right-click the arrow next to the term you want to remove, choose **Remove Term**, and then click **OK**.

Alternatively, you can edit, add or remove terms from a product.

To Edit Terms on a Product

1. In the tree, expand the **Product** hierarchy, and then locate the relevant product.
2. Click the product, and then click the **Commercial** tab.
3. Click the **Flipper** icon  next to **Terms**. The terms of the product is displayed in a list.
4. Right-click the arrow next to the product whose terms you want to edit, and select **Edit Term**.
5. Right-click the right arrow next to the preferred term, and then choose **Edit Term**. The **Edit Terms** dialog appears.
6. Make the preferred changes, and then click **OK**.

To Add Terms to a Product

1. Complete steps 1-3 as described in To Edit Terms on a Product.
2. Right-click the arrow next to the relevant product, and then choose **Add Term**. The **Add Term to Product** dialog is displayed.
3. Click the ellipses points ..., locate the relevant commercial list, and then click **Next**.
4. Click **Add Term**, enter the relevant terms, and then click **OK**.

To Remove All Terms from a Product

1. Complete steps 1-3 as described in To Edit Terms on a Product.
2. Right-click the arrow next to the relevant product, and then choose **Remove Term**. The **Remove terms for product** dialog is displayed.
3. Verify that you want to remove the listed terms, and then click **Delete**. All the product terms are removed.

To Remove a Single Term from a Product

1. Complete steps 1-3 as described in To Edit Terms on a Product.
2. Right-click the right arrow next to the preferred term, and then choose **Edit Term**. The **Edit Terms** dialog appears.
3. right-click the arrow next to the term you want to remove, choose **Remove Term**, and then click **OK**.

Viewing Commercial Data

When you have created a commercial list, there are different ways of viewing the commercial data.

You can view commercial data from the following areas.

- Commercial list
- Product
- Flatplanner Basket
- Flatplanner Financial Summary
- Flatplanner Sticker Book view

Note: If you cannot see commercial data in Basket or Sticker Book view, you have to add commercial data to the views.

To View Commercial Data from a Commercial List

1. In the **Tree**, expand the **Publication** hierarchy, expand the relevant publication, and then expand Commercial Data.
2. Click the relevant commercial list, and then on the **Price List** tab click the **Flipper** icon . The content of the list is displayed in a table.

To View Commercial Data from a Product

1. In the **Tree**, expand the **Product** hierarchy, and then click the relevant product.
2. On the **Commercial** tab, click the **Flipper** icon  next to the **Terms** heading. The content of the lists related to the product is displayed.

To View Commercial Data from Basket

1. In the **Tree**, expand the **Publication** hierarchy, expand the relevant publication, and then click a section or spread.
2. On the **Flatplanner**, click **Show Basket**.

To View Commercial Data from Sticker Book View

When you are planning a page or reviewing existing pages, you can use the Show Sticker Book view to view the commercial data on each product on the page.

When you use the Sticker Book view, the commercial data are displayed on the pages.

1. In the **Tree**, expand the **Publication** hierarchy, expand the relevant publication, and then click the relevant spread.
2. On the **Flatplanner**, right-click a white area, point to **View**, and then choose **Show Sticker Book**. A yellow sticky note appears. The note displays the commercial data of the product.

To View a Financial Summary

In some cases it can be useful to view a financial summary of a section. The information can be detailed for example per page, version or section.

1. In the **Tree**, expand the **Publication** hierarchy, expand the relevant publication, and then click the relevant section.
2. Click the **Financial Summary** tab.
3. From the **Show summary** for list, select **Basket**, **Planned Pages** or **Actual Pages**.

Searching Commercial Data

You can search for specific products in a commercial list.

1. In the **Tree**, expand the publication hierarchy, click the relevant publication, and then expand the **Commercial Data** hierarchy.
2. Click the relevant commercial list, and then click the **Price List** tab.
3. Click the **Flipper** icon  next to **Contents of <name of the commercial list>**. The content of the list is displayed in a table.
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. The search results are displayed.

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

Mapping a Publication Version Using Commercial Data

When creating a new publication version, and if your publication is using commercial data, the terms list(s) must be mapped to the version before commercial data can be mounted onto InDesign pages. Follow these steps to map commercial data to your publication version.

ID	Name	Context	Workspace	Price	SalesPrices
108200	English US	English US	Main	Spring Prices	Spring Sales Prices
Add version					

1. In the Tree, unfold the **Publication** hierarchy.
2. Click the **Publication** and click the **Version** tab.
3. If working with commercial lists, click the value list in the **Price** field and then select a commercial list.