



Product Data Exchange Documentation

June 2024

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Product Data Exchange (PDX) Enhancements

2024.2 Enhanced features

This update includes functionalities highlighted in the 2024 Updates released this year. Click a topic link for additional details on that functionality.

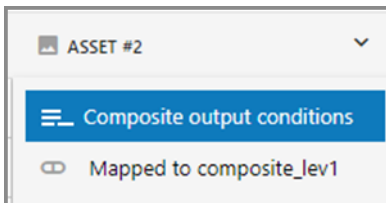
For a list of all updates in 2024, refer to the 2024 Updates topic.

- [Composite output conditions enabled](#) on other attribute mappings
- [Prefix search enabled](#) in Digital assets
- [Ability to set attributes as searchable](#) in Direct Channels
- [Ability to set grid view as default](#) in user preferences
- [New filtering ability for last updated date for products](#) in channels and master data
- [Ability to skip 'bearer token' in HTTP delivery](#) for Configured Channels
- [Consolidated templates option added](#) to configured channel output configuration
- [Asynchronous download of product data to Excel file](#) in Master Data and channels
- [Changes to Auto-Categorization and Manually-Added Product Behavior](#)
- [Variables added to email template](#) for Configured Channels

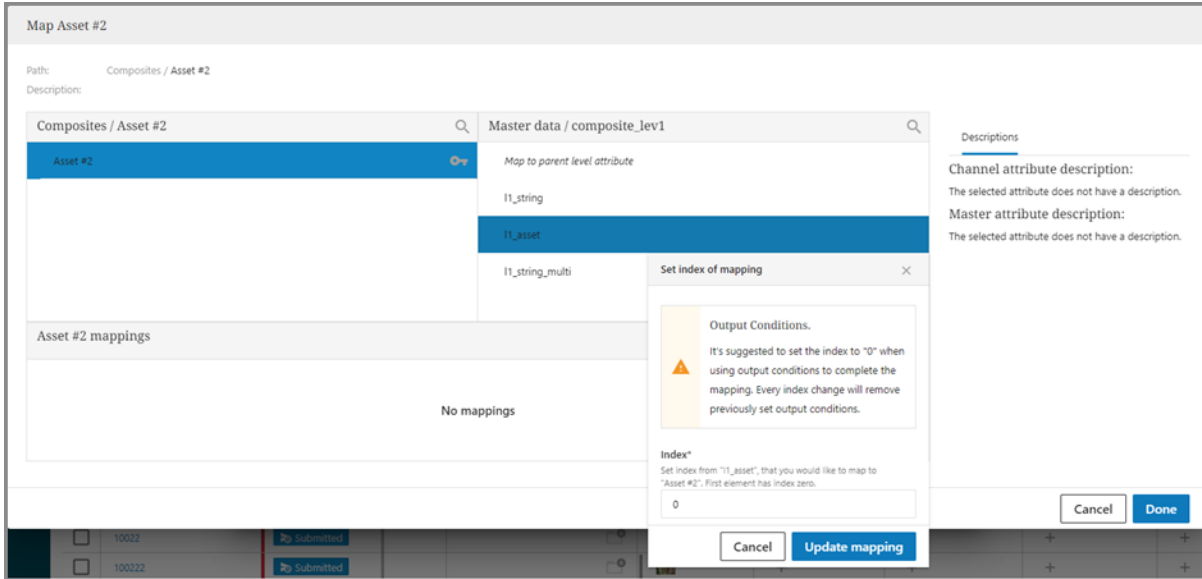
Composite output conditions enabled

'Composite Output conditions' can now be applied to mappings beyond those between a master data composite and channel composite. Additionally, you can use 'Output conditions' on channel attributes such as assets, strings, dates, and integers if they are mapped to a composite sub-attribute in Master Data.

In the example below, 'Composite output conditions' are available for a channel asset attribute that is mapped to a composite sub-attribute in Master Data.



In the example below, the user is creating a mapping between a channel asset attribute named 'Asset #2' and a Master data composite sub-attribute named 'l1_asset.'

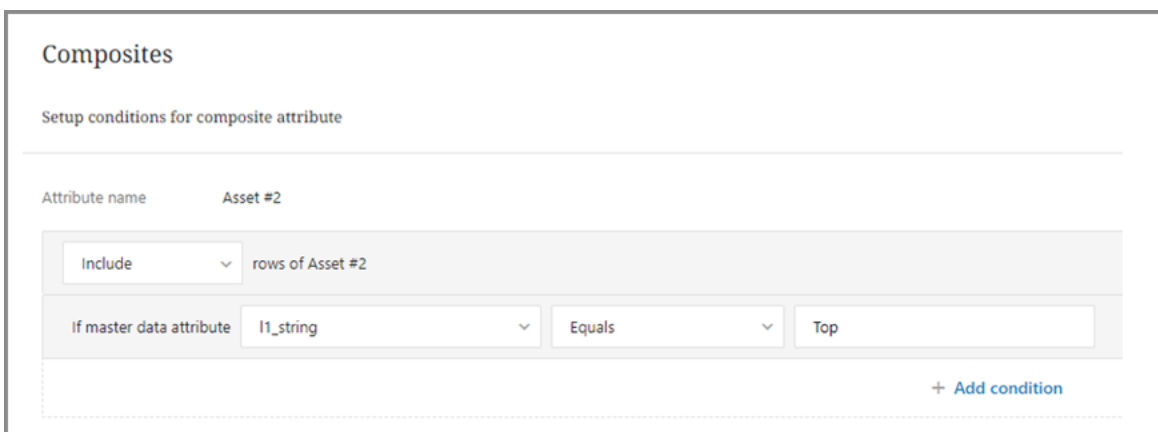


If a user does a mapping to a single valued attribute, it is recommended to set the Index value to 0.

If the definition of 'Output conditions' yields only one match, then the value at Index 0 (the first value) ensures that this single match will be mapped. Index 0 corresponds to the first row in a row selection, and Index 1 corresponds to the second row, and so forth.







If the user sets the Index to 3 and the Output Conditions yield only one match, no asset will be mapped because the one match corresponds to an Index value of 0.

Below is an example of a 'Composite Output condition' in a channel named 'Composites.' The asset attribute 'Asset # 2' is mapped to an asset sub-attribute (L1_Asset) in Master data. Since it is mapped to a composite sub-attribute, it could contain multiple assets. The 'Output condition' states that only assets where the sub-attribute 'I1_string' is equal to 'Top' will be mapped to the attribute in the channel.



In this case, only the asset where 'L1_String' is equal to 'Top' will be mapped. As in the example below from Master data, it will then be the asset in row 3 that will be mapped to asset attribute in the channel.

Path: Wine_World / composite_lev1
Description:

<input type="checkbox"/>	▲ L1_STRING*	<input type="checkbox"/>	L1_ASSET*	▲ L1_STRING_MULTI*	<input type="checkbox"/>	COMPOSITE_LEV2*
<input type="checkbox"/>	Front		Level 1 String #2, Level ...	<u>Level 2 #1 String</u>		1
<input type="checkbox"/>	Back					0
<input type="checkbox"/>	Top					0

Important: ‘Composite Output Conditions’ can only be used on sub-attributes that are defined at first level in a composite. Sub-attributes that are created on nested composites cannot be used in composite output conditions.

Prefix search enabled

Previously, a user performing a search in Digital assets would have to enter the full name of the asset to obtain a result in the search. Now, the search feature is extended so it is possible to search for assets using a prefix search.

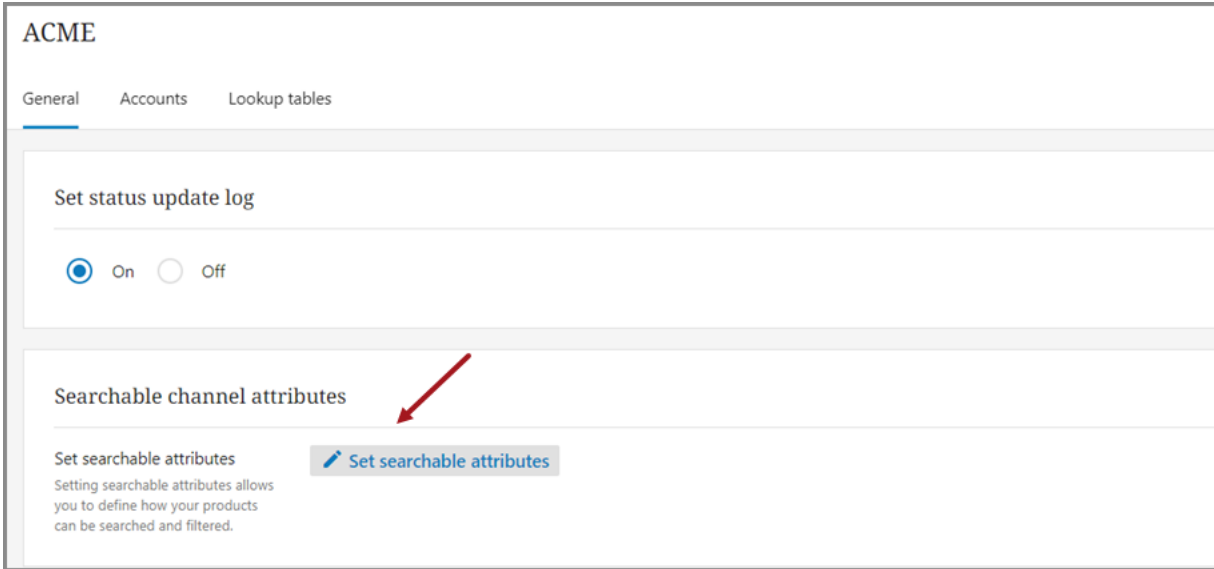
A user will need to enter a minimum of three characters in order to perform the prefix search. The prefix search is only performed on the first word in the name of the file.



Ability to set attributes as searchable

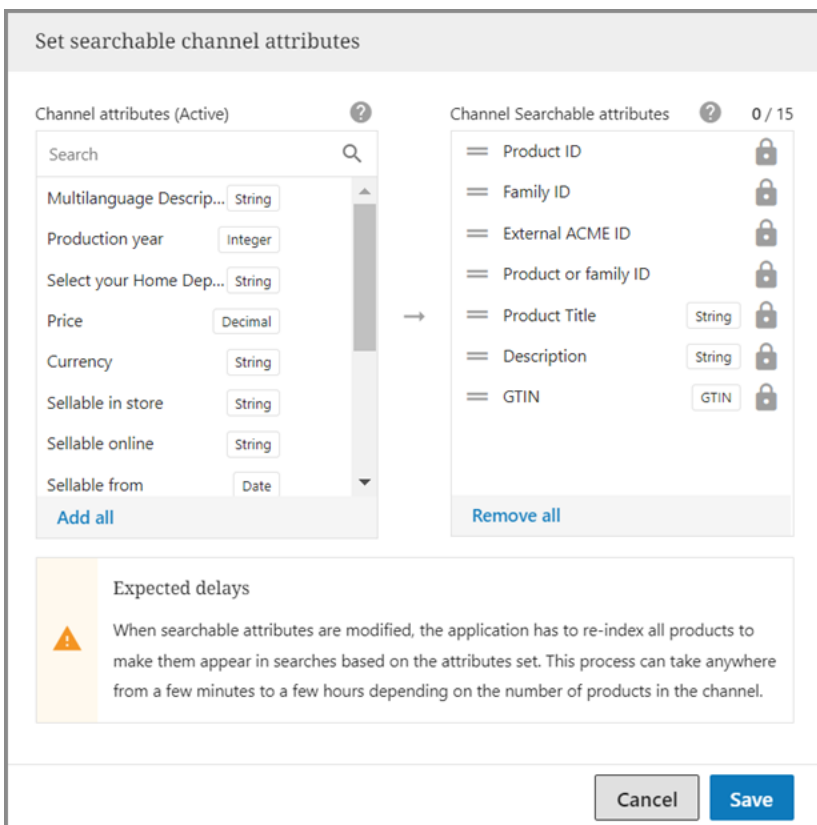
Users with access to ‘Direct Channels’ in Channel Management now have the possibility to set up searchable attributes in a direct channel.

On the General tab and in the section ‘Searchable channel attributes,’ the user can define which attributes should be displayed in the filters where attributes are used.

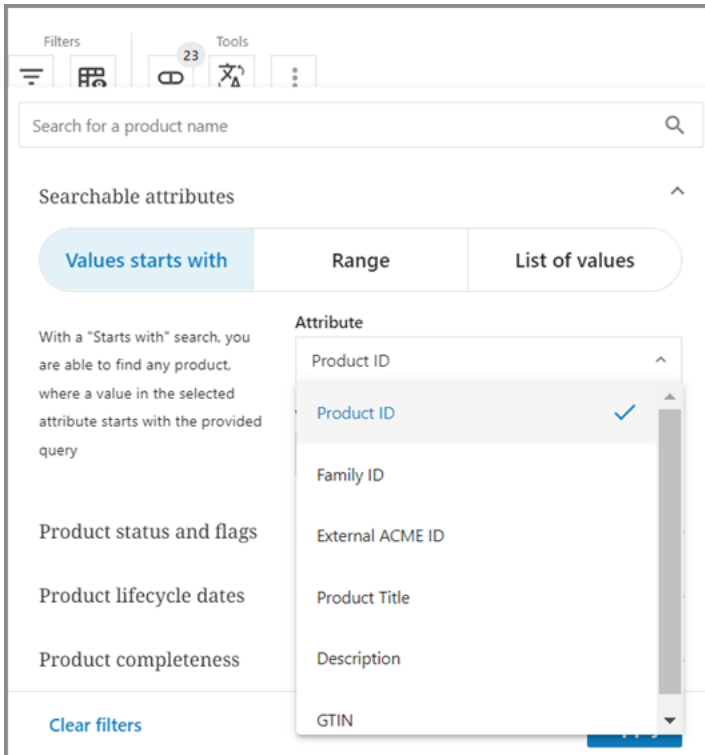


The below window will open when a user clicks 'Set searchable attributes.' Attributes can be activated when clicked in the left-side window. Attributes displayed on the right side are activated. Order of attributes can also be defined by clicking on the two lines and moving the attribute up or down.

Attributes with a keylock cannot be removed as they are part of a channel's data standard.






The definition and order of the attributes will be shown in the filter 'Product attributes' in list view and grid view.



In this first version of 'Set searchable attributes' only attributes that are linked to the channels root category can be set. Attributes that only exist in one or more categories will not be available. Attribute types like composites and assets cannot be added to a search filter.

Ability to set grid view as default


A new user preference has been added to 'Your profile' settings. The 'Show grid as default view' setting allows a user to set the grid view as the default view for channels and master data in order to immediately start working in the preferred mode.

Your profile   

Personal info

Name User_S
Email user_1s@stibosystems.com
Password [Change password](#)

General settings

Preferred language en 

You can choose the language in which the application will be displayed according to your needs.

Feature settings

Show category dashboard Show category dashboard
The category dashboard helps track channel category progress and navigate to specific levels.

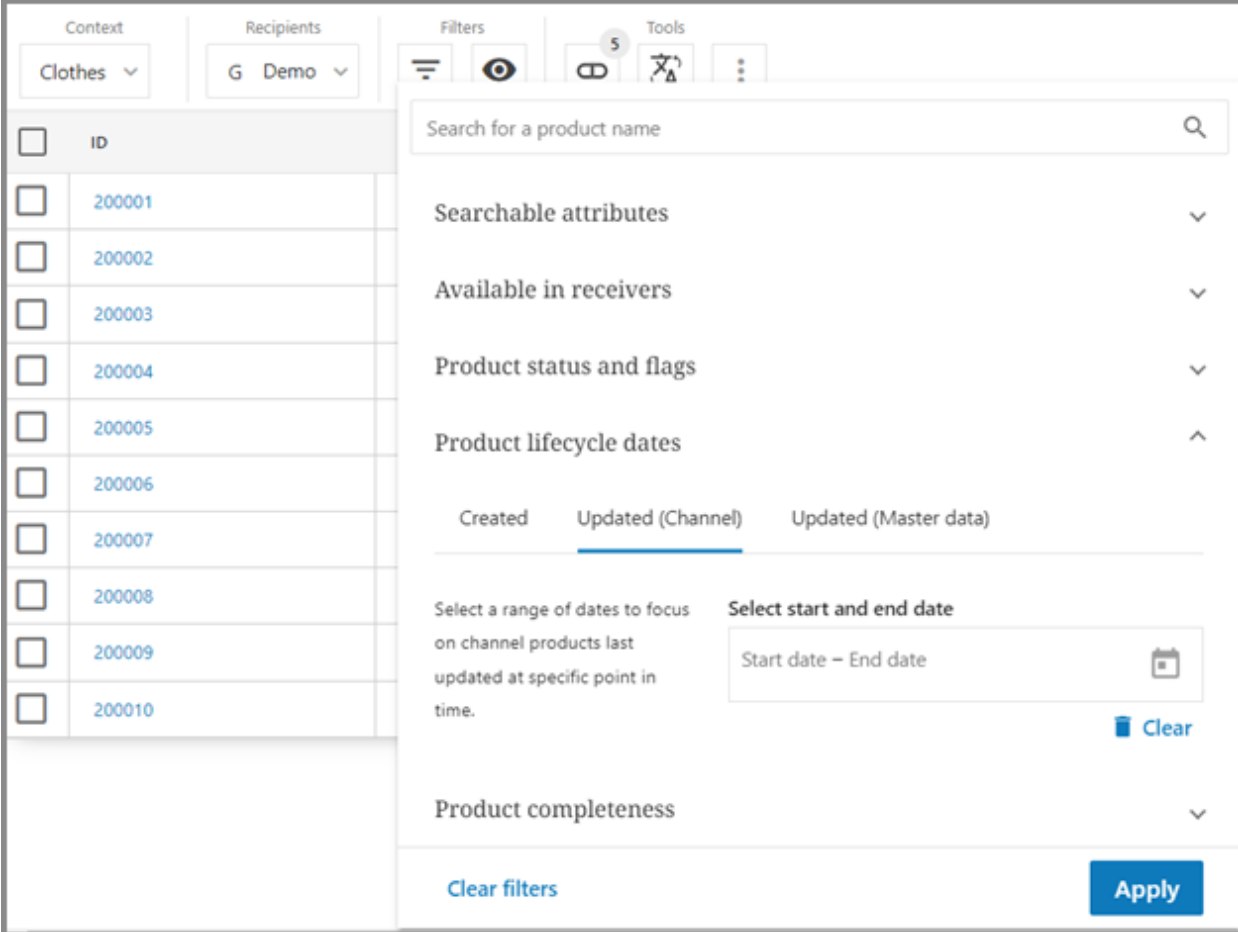
Show grid as default Show grid as default
The default view for the channels and master data will be set to grid.

[Save](#)

New filtering ability for last updated date for products

A new product filter available in list and grid views allows to filter by products updated within a specific date range to more easily find the relevant products to edit / submit.

In channels users can filter by both 'Updated in channel' and 'Updated in Master Data' date ranges, and users can filter by the 'Updated in Master Data' date range in master data.



The screenshot shows the Product Data Exchange interface. On the left, there is a table with columns for 'ID' and a checkbox. The table contains 10 rows of product IDs from 200001 to 200010. Above the table are tabs for 'Context' (set to 'Clothes') and 'Recipients' (set to 'G Demo'). To the right of the table is a 'Filters' sidebar. The sidebar includes a search bar for product names, expandable sections for 'Searchable attributes', 'Available in receivers', 'Product status and flags', and 'Product lifecycle dates'. Under 'Product lifecycle dates', there are tabs for 'Created', 'Updated (Channel)', and 'Updated (Master data)'. Below these tabs is a date selection tool with a 'Select start and end date' input and a 'Clear' button. At the bottom of the sidebar are 'Clear filters' and 'Apply' buttons.

Ability to skip 'bearer token' in HTTP delivery

Previously, if a user chose 'Send request to get bearer token' in HTTP delivery, the 'Bearer' prefix was automatically added to the token received.

A user can now select 'Skip Bearer prefix in header' with the following description: 'This will allow you to send token in Authorization header without Bearer prefix.' This checkbox is placed below the 'Token name' input field in the Authentication section of an HTTP delivery method configuration.

With this option, a user can input different prefixes and send them together with the token.

Output configuration

Output template*
Select output template which will act as a body in the request.

Select output template

Params Headers **Authentication**

Authentication method
It specifies the security protocol to be used for API authorization.

Send request to get bearer token

Method and URL*
Select method and add URL

POST

https://

Token name ?
Please provide the name of the field from the response that contains your token

Bearer prefix
This will allow you to send token in Authorization header without 'Bearer' prefix.

Skip 'Bearer' prefix in header

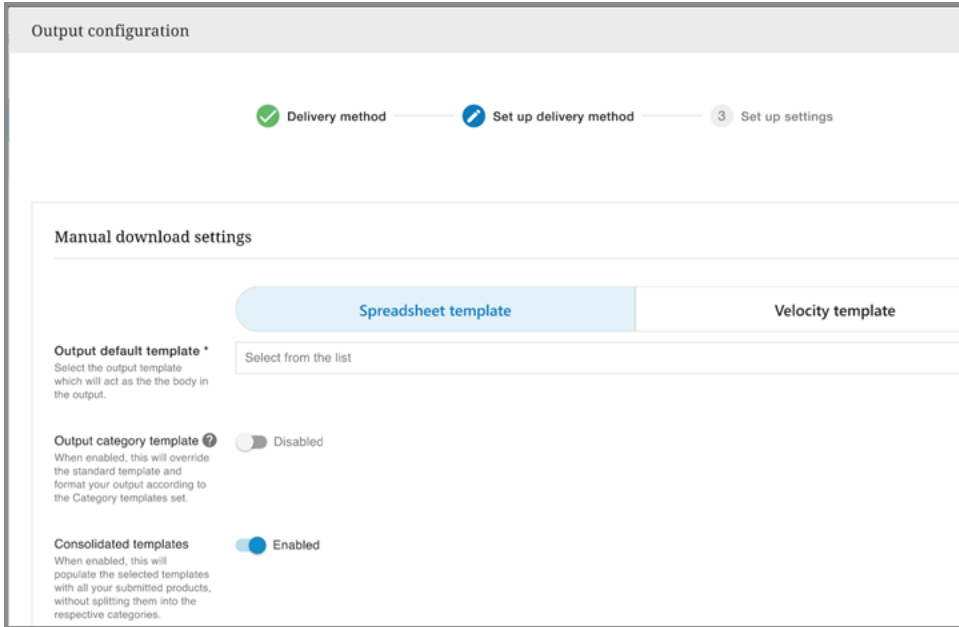
Cancel

Back

Next

Consolidated templates option added

Originally referred to as 'Support All-Products-In-One Template Output in Configured Channels' in the update preview, this new consolidated templates option has been added for spreadsheet templates in Output Configuration of configured channels. This option allows users to submit all products across categories from a Configured Channel into a single output template. The option will not split products into output files by category, meaning receivers won't have to look through many different spreadsheets when they receive the submission to get all data. This is mutually exclusive to the 'Output category template' option.

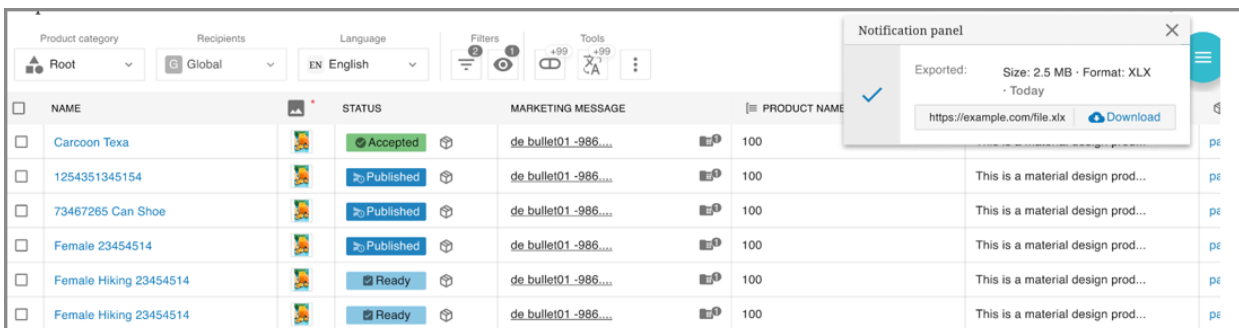


Asynchronous download of product data to Excel file

Downloading the data from both Master Data and Channels is now asynchronous, with no limit on the number of products that can be exported. Longer download times for large export files might occur.

When the user starts downloading, the following message will display: 'Your download has started. We will notify you once it is ready.'

Once the product file is ready for download, another notification will display, which will contain the download link:



NAME	STATUS	MARKETING MESSAGE	PRODUCT NAME
Carcoon Texa	Accepted	de bullet01 -986...	100
1254351345154	Published	de bullet01 -986...	100
73467285 Can Shoe	Published	de bullet01 -986...	100
Female 23454514	Published	de bullet01 -986...	100
Female Hiking 23454514	Ready	de bullet01 -986...	100
Female Hiking 23454514	Ready	de bullet01 -986...	100

Changes to Auto-Categorization and Manually-Added Product Behavior

Previously, products manually added to a channel were permanent: the products must be manually removed and then re-added using rules in order to allow rules to remove them again. Now, the behavior allows rules to remove manually added products from a channel:

- A product manually added to a channel that matches existing rules will be treated as if added by rules when the rules are run.
- A product manually added to a channel that originally matched the rules will be removed if it no longer matches the rules.
- A product manually added to a channel that never matched the rules will *not* be removed, even if there is no current match.

Ultimately, a manually added product first has to match the rules and then *not* match those rules before the product is removed by rules – otherwise, it will remain in the channel until removed manually.

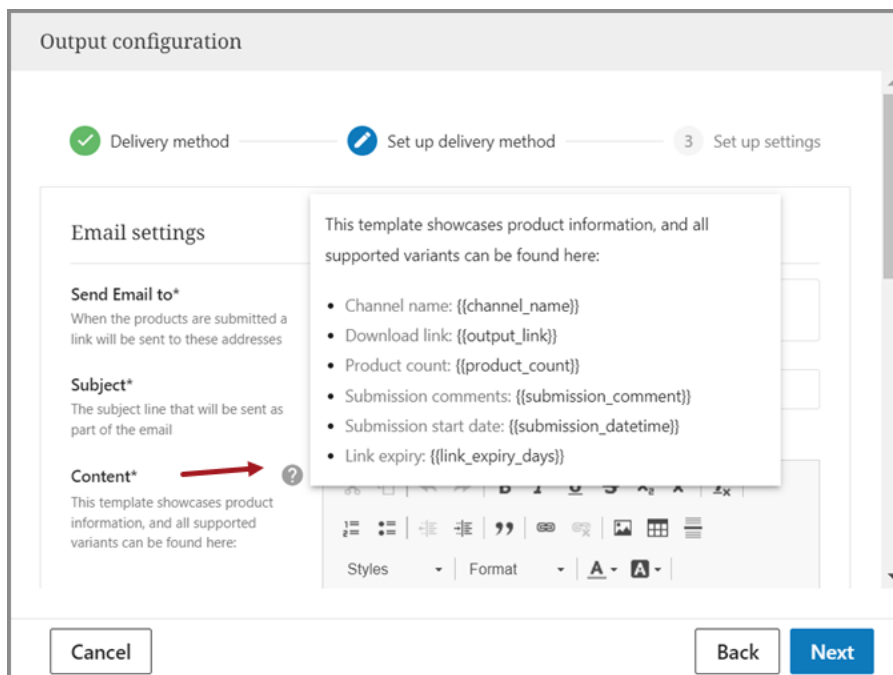
Variables added to email template

Additional variables are now available in the email templates for Configured Channels. These additional submission variables, which can be added to a configured channel's output configuration, can increase the amount of information available to the receivers.

The following variables have been added to the template:

- Submission comment
- Submission date / time
- Link expiry days

All currently available variables are now also listed in the tooltip message for the email content section:



CSV templates supported

CSV templates are now supported along with Excel templates in the Configured Channels output configuration template library.

Template library

Spreadsheet templates ?
Upload a file (xlsx, xltx, xltm, xslm, csv) that will contain the submitted product data.

Name	Date uploaded/created	Date updated	Actions
generic template.xlsx	2023-08-17 11:28:12	2023-08-17 11:28:12	
Submissions_2024-01-22T17_39_02.3012...	2024-02-29 17:17:57	2024-02-29 17:17:57	
Generic2.csv	2024-02-29 17:21:24	2024-02-29 17:21:24	

[+ Add spreadsheet template](#)

Output configuration

Manual download settings

Spreadsheet template | Velocity template

Default output template
Select output templates which will act as the body in the output.

Category output template ?
When enabled, this will override the standard template and format your output according to the Category templates set.

i

- When you submit products, a download link for the output file will be provided.
- The output will be formatted according to the templates set.
- PDX is not set to distribute the manual link or file.

Generic2.csv

Search

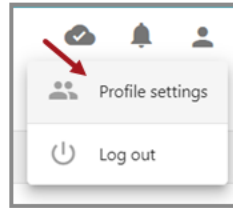
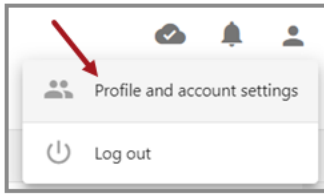
- generic template.xlsx
- Submissions_2024-01-22T17_39_02.301239132Z.xlsx
- Generic2.csv

[Select all](#) [Clear selection](#)

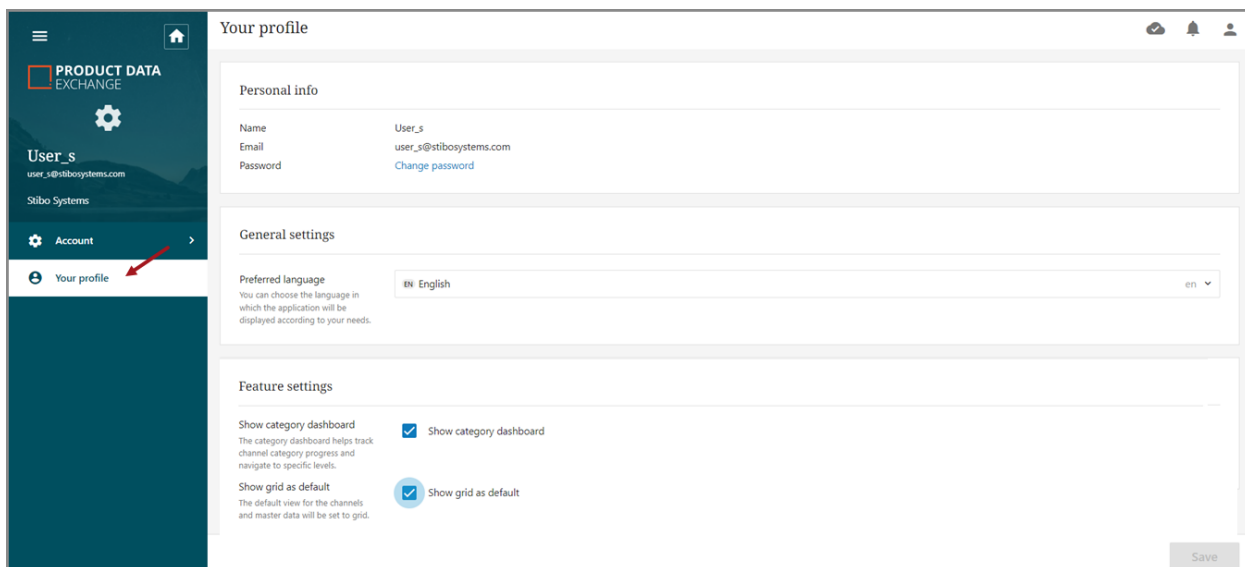
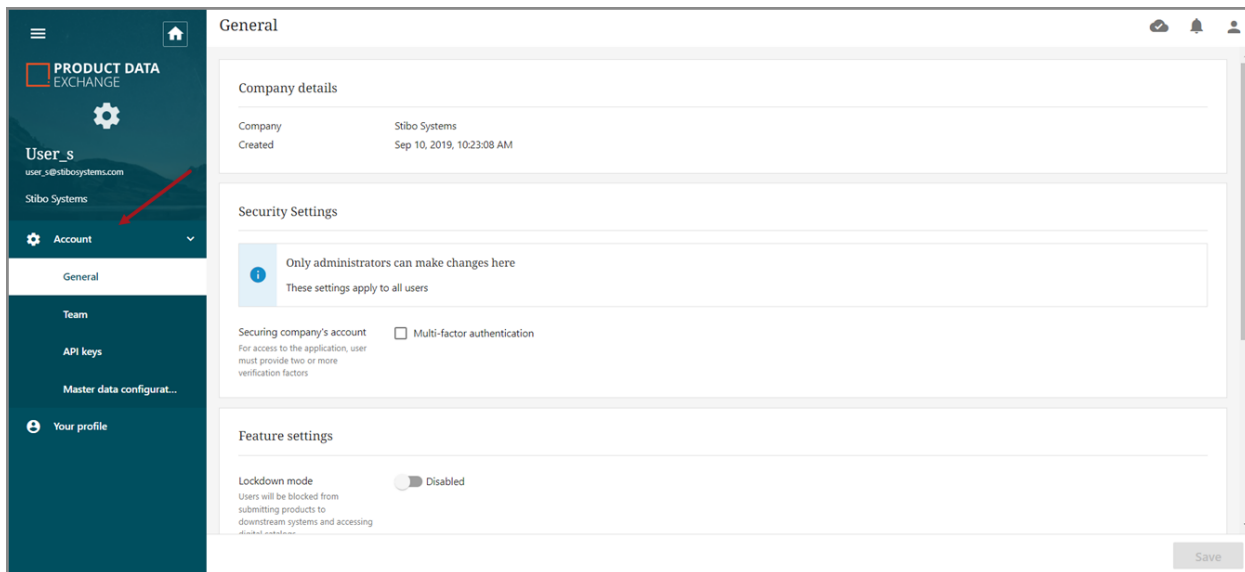
[Cancel](#) [Back](#) [Next](#)

New account settings view

A new account settings view is now available for all users under the user icon. Client admin users will have a *Profile and account settings* view option, and regular users will have a *Profile settings* view option.



If a user clicks on the applicable new settings view, a new sidebar will appear in the tool. Both user levels will have the 'Your profile' option. This option provides settings such as resetting the password (formerly placed under the user icon), preferred language, and user level feature settings. and client admin users will also have an expandable 'Account' option.



Client admin users will also see an expandable menu for Account options.

1. **General:** provides general information about the account as well as settings previously available under Configuration -> Feature settings.
2. **Team management:** was previously available under the user icon as 'Manage team.'
3. **API keys:** provides option to add and delete API keys.
4. **Master data configuration:** previously available under Configuration -> Master settings.

Feature toggles cleanup

Some feature toggles have been deprecated and removed. The remaining feature toggles have been divided into Customer controlled and Stibo controlled. Customer controlled settings are available in the 'Your profile' or 'General' settings tabs. Stibo controlled settings are owned and managed by Stibo Systems Professional Services and are moved to a separate administration application.

Customer controlled: settings that can be enabled or disabled by clients

- **User preferences**
 - Set on user level
 - Currently include 'Show category dashboard'
- **Client settings**
 - Set on client level and should all affect all users of a given client
 - Available only to client admins in Account -> General settings screen
 - Currently include 'Lockdown mode'

Stibo Systems controlled: settings available only to Stibo Systems employees

- **Client settings**
 - Set on client level and should all affect all users of a given client
 - Set individually for each customer
 - Include the following
 - Enable product limits
 - Use websockets for fetching import feed
 - Allow retrieving products from channels that allow retrieval
 - Use simple presubmit validation
 - Enable vendor portal

- **Test features**

- Temporary features to be used by testers and/or beta testers
- Will be set to **on** by default and removed upon successful testing completion
- Currently include the following
 - Enable process log
 - Enable new toolbar

The table below provides a list of all previously available feature toggles and their current state:




Feature toggle	Comment	Currently
Enable product limits	Client setting API only	Moved to Admin portal
Show only newly added products after adding to channel	Deprecated	Turned off by default and removed
Use websockets for fetching import feed	Client setting	Moved to Admin portal
Enable commenting submissions	Deprecated	Turned on by default and removed
Show category dashboard	User preference	Moved to user settings screen - 'Your profile' section
Show notification when products indexing finishes	Deprecated	Turned off by default and removed
Enable receiver for Digital Catalog	Deprecated	Turned on by default and removed
Enable inviting receivers to Digital Catalog	Deprecated	Turned on by default and removed
Show private channels	Client setting	Moved to Admin portal
Show match-based import	Deprecated	Turned on by default and removed
Allow retrieving products from channels that support retrieval	Client setting	Moved to Admin portal
Use simple presubmit validation	Client setting	Moved to Admin portal
Use new import flow	Deprecated	Turned on by default and removed
Render families separately	Deprecated	Turned on by default and removed
Enable nested composites for configured channels	Deprecated	Turned on by default and removed
Enable rich content documents	Deprecated	Turned off by default and removed
Enable vendor portal	Client setting	Moved to Admin portal
Enable quality scoring	Deprecated	Turned on by default and removed
Enable process log	Testing purposes	Moved to admin portal - Test features
Enable new toolbar	Testing purposes	Moved to admin portal - Test features
Use new configured channels output configuration	Deprecated	Turned on by default and removed
Lockdown Mode	Client setting in PDX	Moved to account settings screen - 'Account' -> 'General' section

New grid view











The 'Render Families Separately' flag is now turned **on** for all users and removed from feature settings. This new view should provide improved performance for viewing families. Now, whenever the channel supports families and there are families to be displayed, the grid will be divided into three tabs:

- Regular products
- Family products
- Variant products

ACME

Double door fridges  Select Account   Click to search or filter products

Regular products | Family products | Variant products

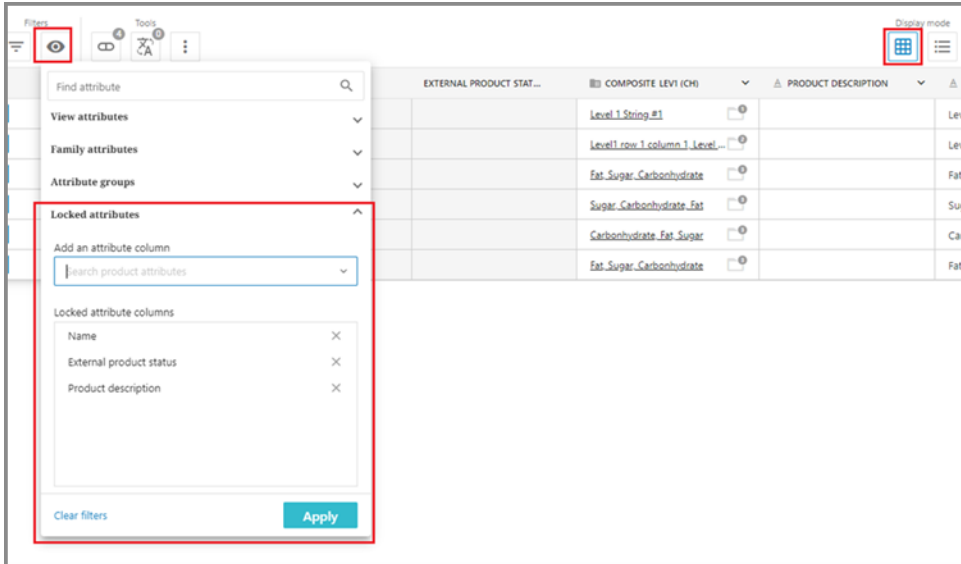
<input type="checkbox"/>	ID	STATUS		NAME	EXTERNAL ACME ID
<input type="checkbox"/>	P11	 Progress	+	Product 11	
<input type="checkbox"/>	P2	 Progress	+	Product 2	
<input type="checkbox"/>	P3	 Progress	+	Product 3	
<input type="checkbox"/>	P4	 Progress	+	Product 4	
<input type="checkbox"/>	P5	 Progress	+	Product 5	
<input type="checkbox"/>	P6	 Progress	+	Product 6	
<input type="checkbox"/>	P7	 Progress	+	Product 7	
<input type="checkbox"/>	P8	 Progress	+	Product 8	
<input type="checkbox"/>	P9	 Progress	+	Product 9	

Channel attribute locking

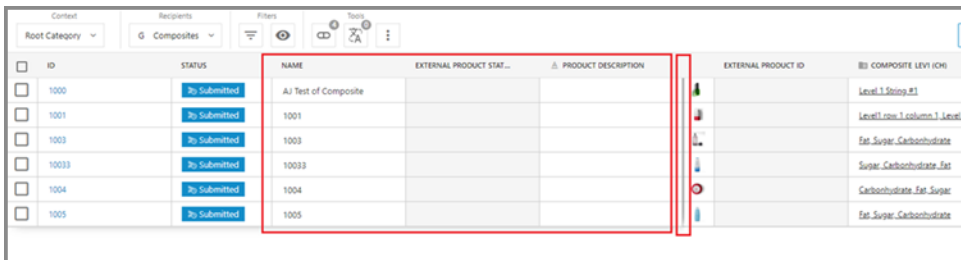
In the grid view in Master data and on channel level, a user can now define which attributes should be locked. Each user can define an individual view for the master data and channels accessible to that user.

In the feature 'Attribute filters,' the user can select attributes to lock by performing a search and selecting the specific attribute.

In the example below, the user has chosen 'Name,' 'External product status,' and 'Product description' to be locked.



These three attributes columns are now locked when the user scrolls on the horizontal navigation bar. Attributes on the left side of the gray thin line are the locked ones. The attributes 'ID' and 'Status' are always shown and cannot be unlocked.



Unpublish products from a digital catalog

It is now possible to unpublish / remove products in a digital catalog. The user of PDX can now select the feature 'Unpublish' under the FAB icon. It is only possible to unpublish products from a Digital Catalog.

The icon for 'Unpublish' will only be shown in channels where a digital catalog has been created. The ability to 'Unpublish' is related to the a user's permissions. A user must have the permission 'Submit to channel' in order to unpublish products.

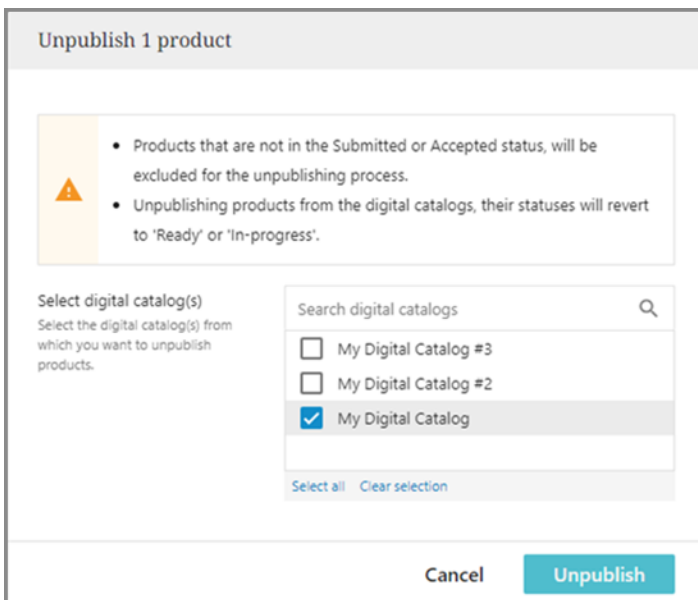
It is only possible to unpublish products that have status 'Submitted' or 'Accepted.' When a product has been unpublished, it will change status back to 'Ready' or 'In-Progress,' depending on the state of the product.



Unpublishing products on a global level in a channel

To unpublish products from a digital catalog, the user must first select which products should be removed. When a user unpublishes products on a global level in a channel, the user will be shown all the digital catalogs that exist in that channel. In the example below, the channel contains three digital catalogs. A user can select to unpublish products from some or all digital catalogs in the channel.


When user has selected the products and then selects 'Unpublish,' the below screen will appear. In the example below, the user has selected to unpublish products only from the digital catalog 'My Digital Catalog.'



Unpublishing products on a receiver level in a channel


If user wants to unpublish products on 'Receivers' level, the selected receiver will be shown in the window, and the user can select 'Unpublish.'

Unpublish 1 product

 Products that are not in the Submitted or Accepted status, will be excluded for the unpublishing process.

- Unpublishing products from the digital catalogs, their statuses will revert to 'Ready' or 'In-progress'.

Digital Catalog(s)


-  My Digital Catalog

Cancel
Unpublish



Removing products from a channel

If user removes products from a channel, the products will also automatically be removed from the channel's digital catalogs.

Remove 1 product

 If you remove this product from the channel, it will be removed from the digital catalog(s).

Digital Catalog(s)

-  My Digital Catalog #3
-  My Digital Catalog #2

Remove product(s) from the channel and its digital catalogs?

Yes, remove product(s)

Cancel
Remove

Deleting product information in master data

If user deletes a product in Master Data, the product will also be deleted in the channels and the corresponding digital catalogs.

Show composite attributes in a digital catalog

It is now possible to show composite attributes in the digital catalog. Composite attributes will be shown on the product details page. If a composite contains multiple levels, it is possible for the user to navigate to a specific level by clicking on the links inside the composite. The link will take the user to the next level of the composite.


Product details

Product ID: 1005

Product name: 1005

Total carbohydrate: Fat;Sugar;Carbohydrate

Images



Asset

Composite_Lev1 (CH) ^

Level1 String (CH)	Level 1 asset	Level 1 String Multivalue	Composite_Level 2
Fat		100	Composite_Level 2
Sugar		25	Composite_Level 2
Carbohydrate		75	Composite_Level 2

Composite_AJ_Top_level v