Workflows - Categories

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- How to resequence Products within Categories
- Managing Products in Bulk
- Deleting a Product
- Copying a Product
- How to make bulk changes to Products from the Category screen in the CMS

Dynamic Categories

Each Product may be manually assigned to Categories. However, the process of adding and removing categories can be simplified through the use of Dynamic Categories.

How Dynamic Categories Work

The user sets up several rules, by which the website can check whether any product qualifies for a Dynamic Category.

Through this method, when products become eligible, that Dynamic Category will be assigned to the Product.

When a product ceases to be eligible, that Dynamic Category will immediately be removed from the Product.

A common Category is 'Sale'. If a Product has a Sale Price that becomes active, it will automatically be added to that Category. When that Sale Price is disabled, the Product will automatically be removed from that Category.

Setting Up New Overlay Rules

Overlay Rules are managed in the second tab of the Edit Category screen.

Simply select the criteria that you wish to apply to your Rule.

> Rules work on an **AND** basis. That means that in order for a rule to be applied, all criteria must be met, e.g. Assign Products which 'Have an active sale price' AND 'were added in the last 30 days' AND 'are in the Beds category'.

Once added, this will be automatically active, and live Products will be assigned if the rule applies to them.

FAQs

How does the Lead Time rule work with Dynamic Categories?

A Product will match this rule if it has any Variants with a lead time between these values. It will not take into account stock currently on the water, e.g. it ignores unallocated stock on Purchase Orders.

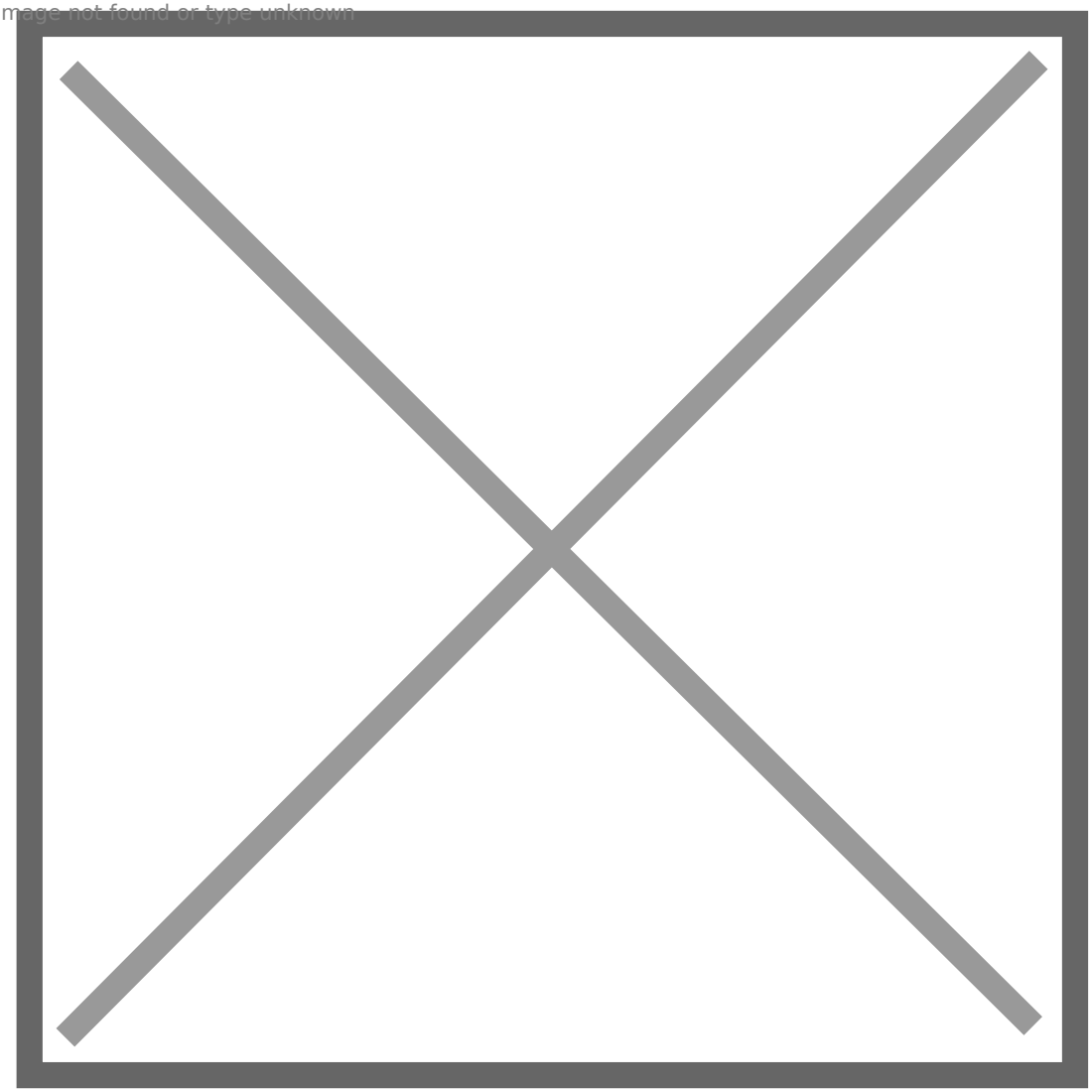
How to resequence Products within Categories

Products can be re-sequenced manually from within the CMS by following these simple steps.

1. Navigate to your CMS.

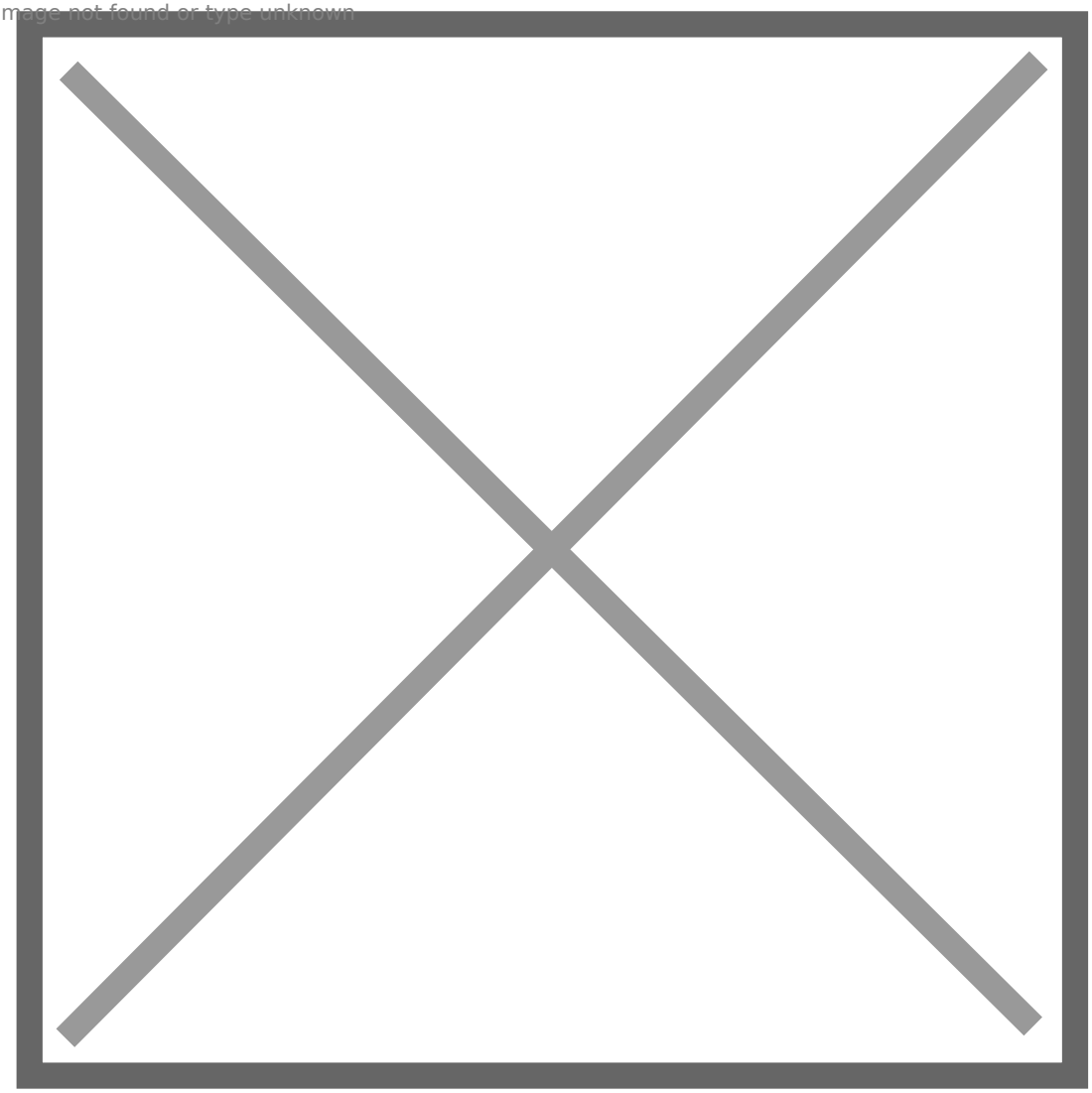
2. Click "Categories" under Catalogue.

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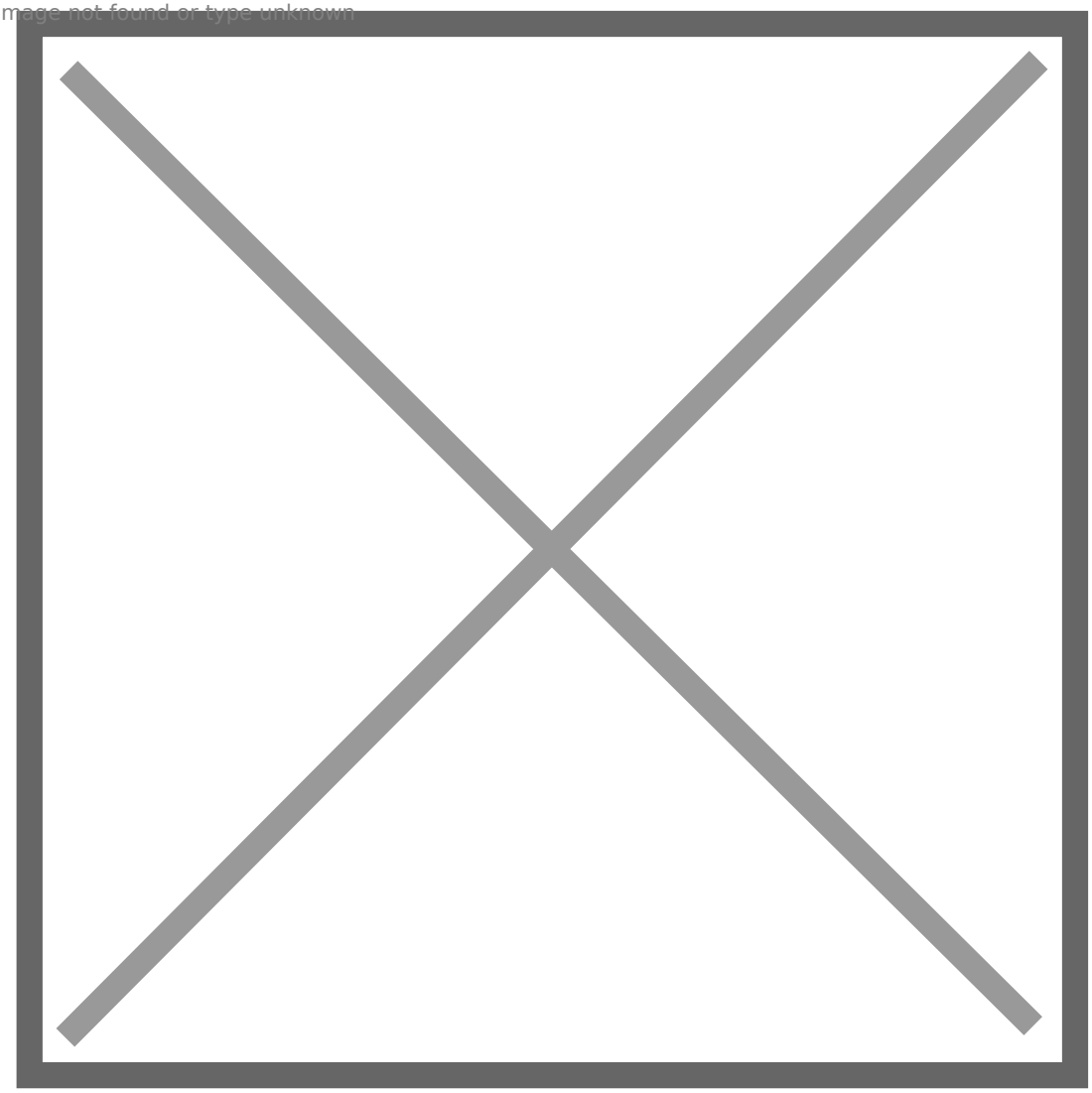
3. Find the appropriate category. In this instance we are using "Living Room".

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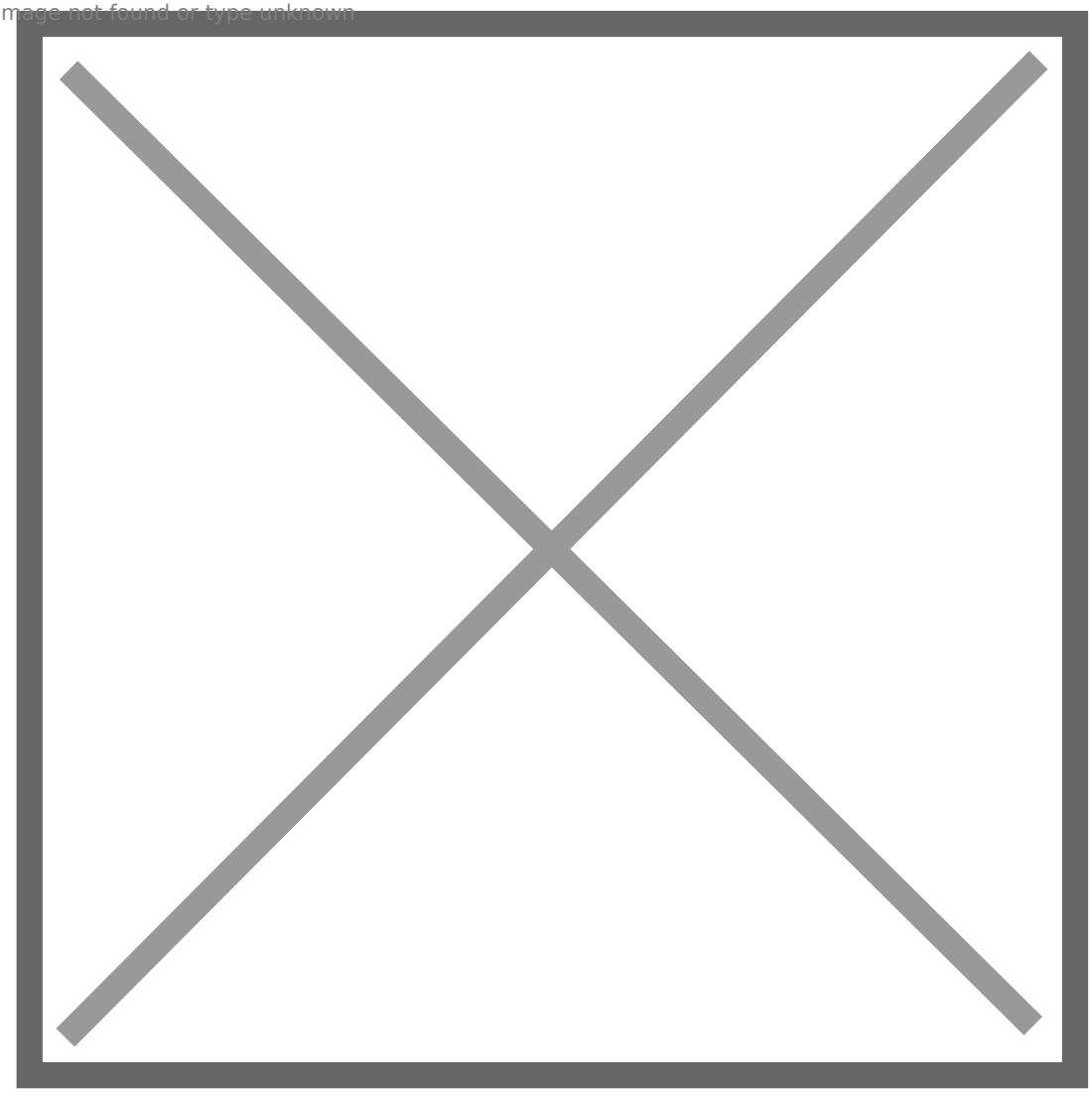
4. Select the appropriate sub-category(s). In this instance we are using "2 Seater Sofas".

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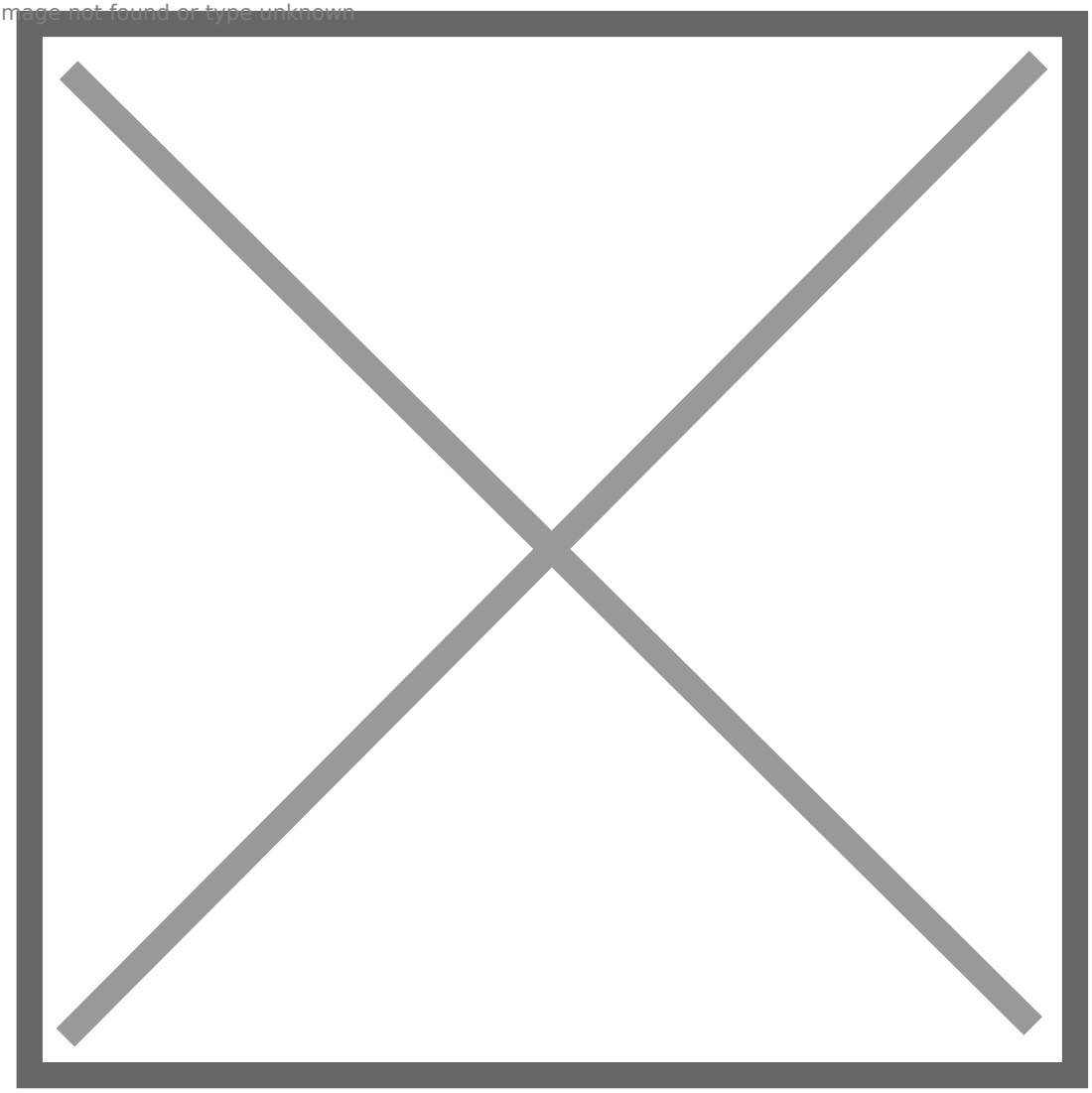
5. When the products are listed, click "Show All".

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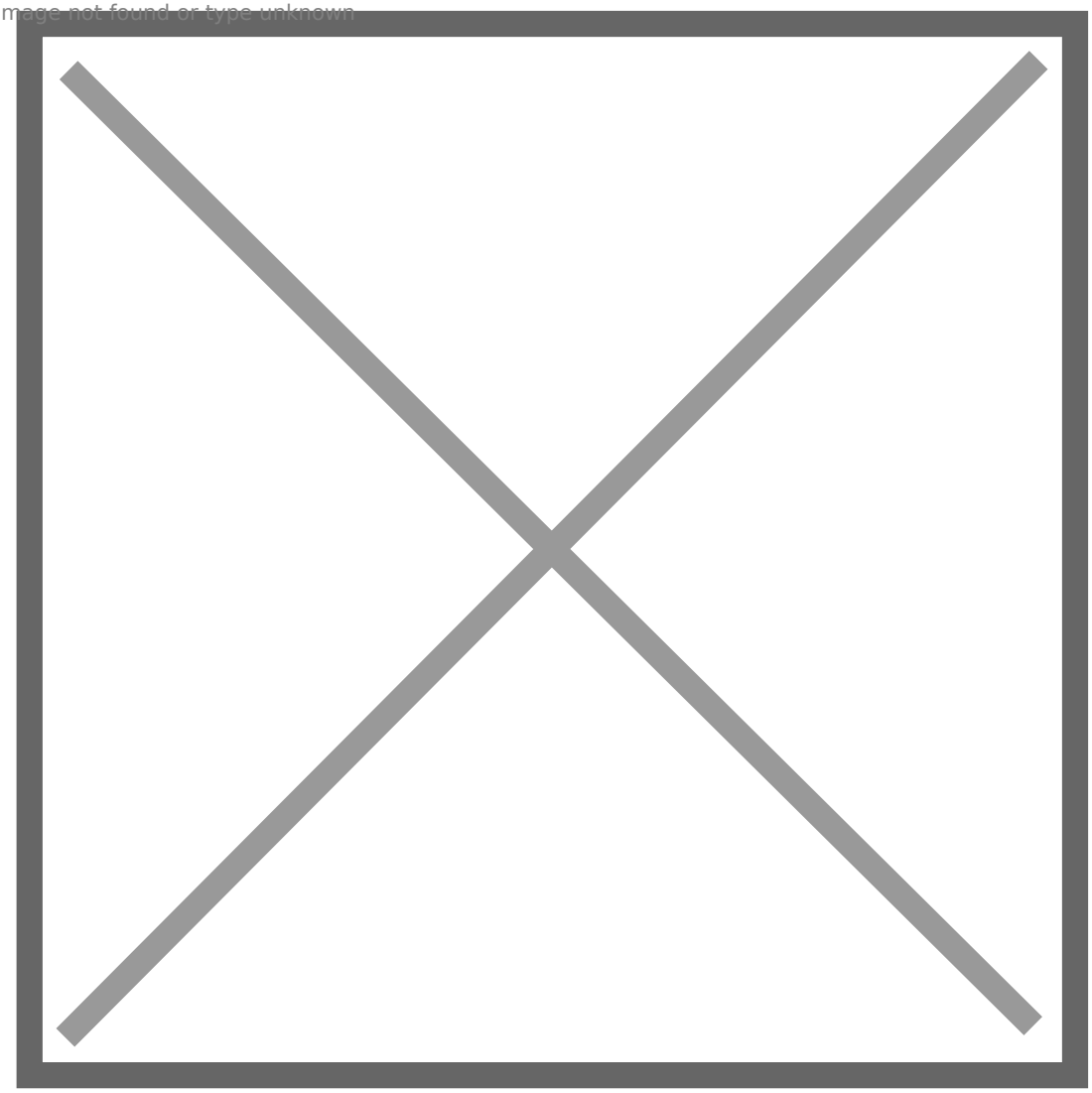
6. After clicking "Show All", you will now be able to re-sequence the products by dragging and dropping to a new position. We will move "Harold Chaise Sofa" to the top.

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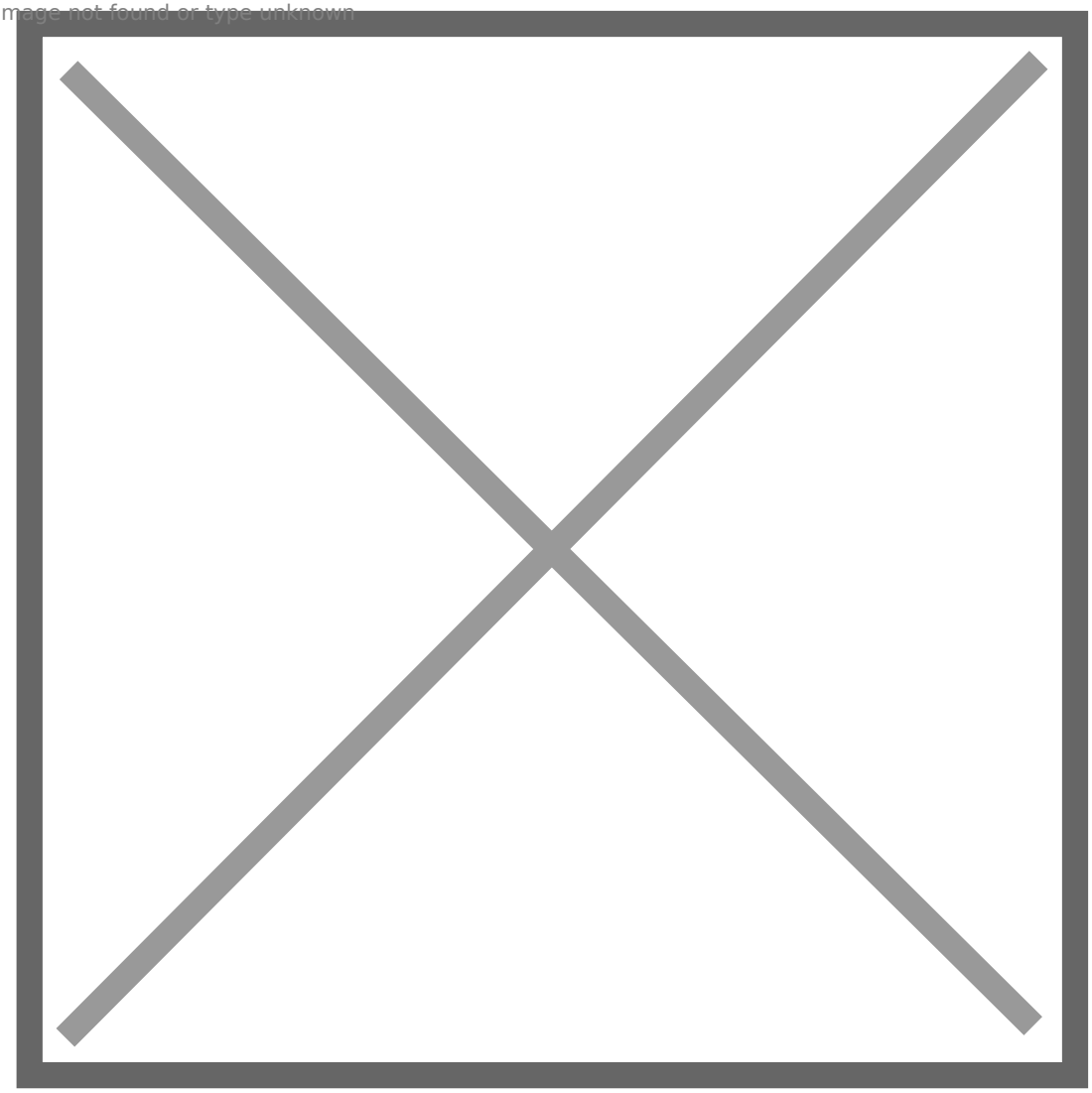
7. We will also move "Orla Kiely Mimosa Small Sofa".

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8. Once you are happy with the new sequence, you can simply return to the parent category, which will save the order of products.

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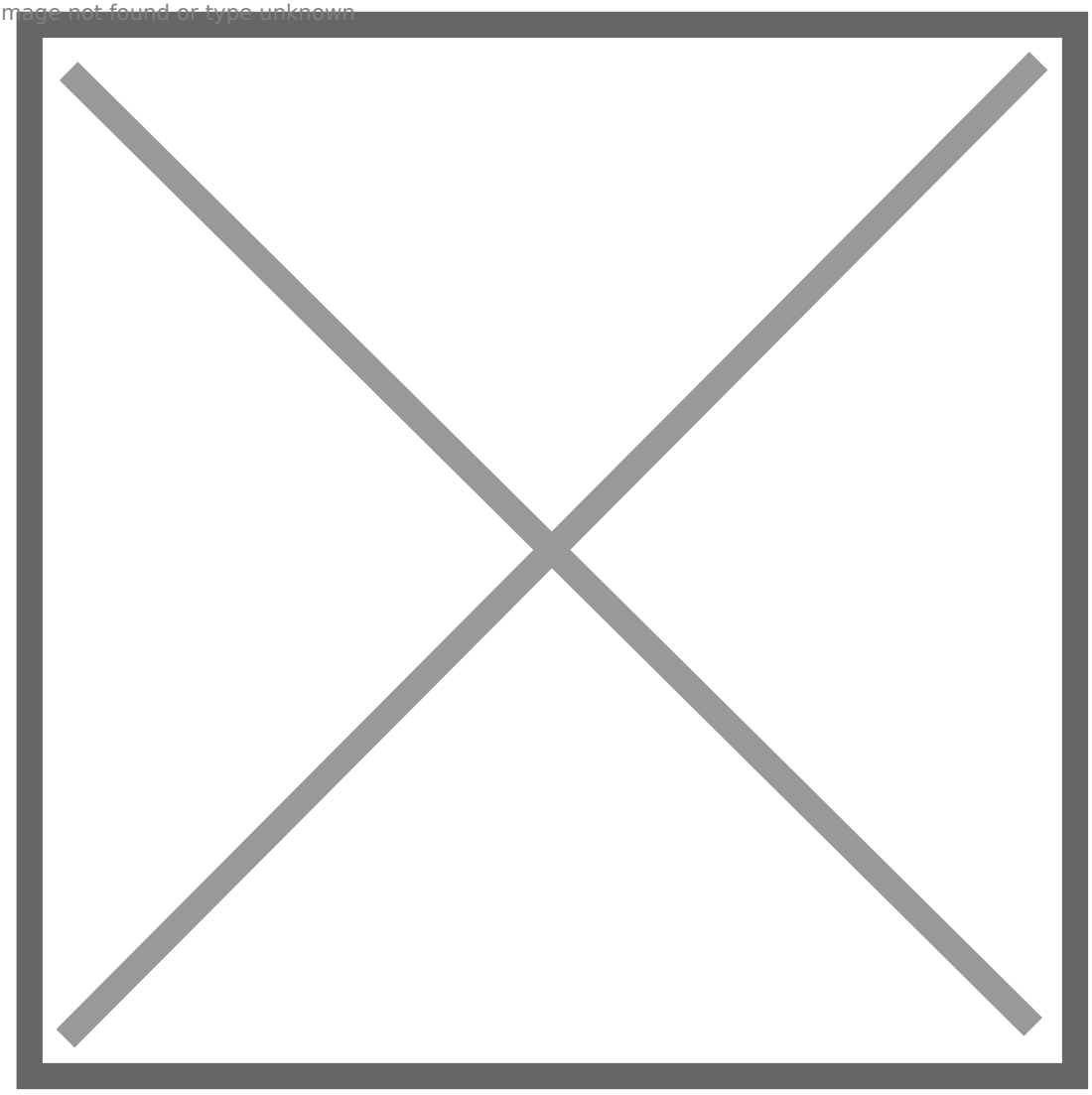
Managing Products in Bulk

Deleting a Product

> When deleting a product, this action will also delete all associated stock.

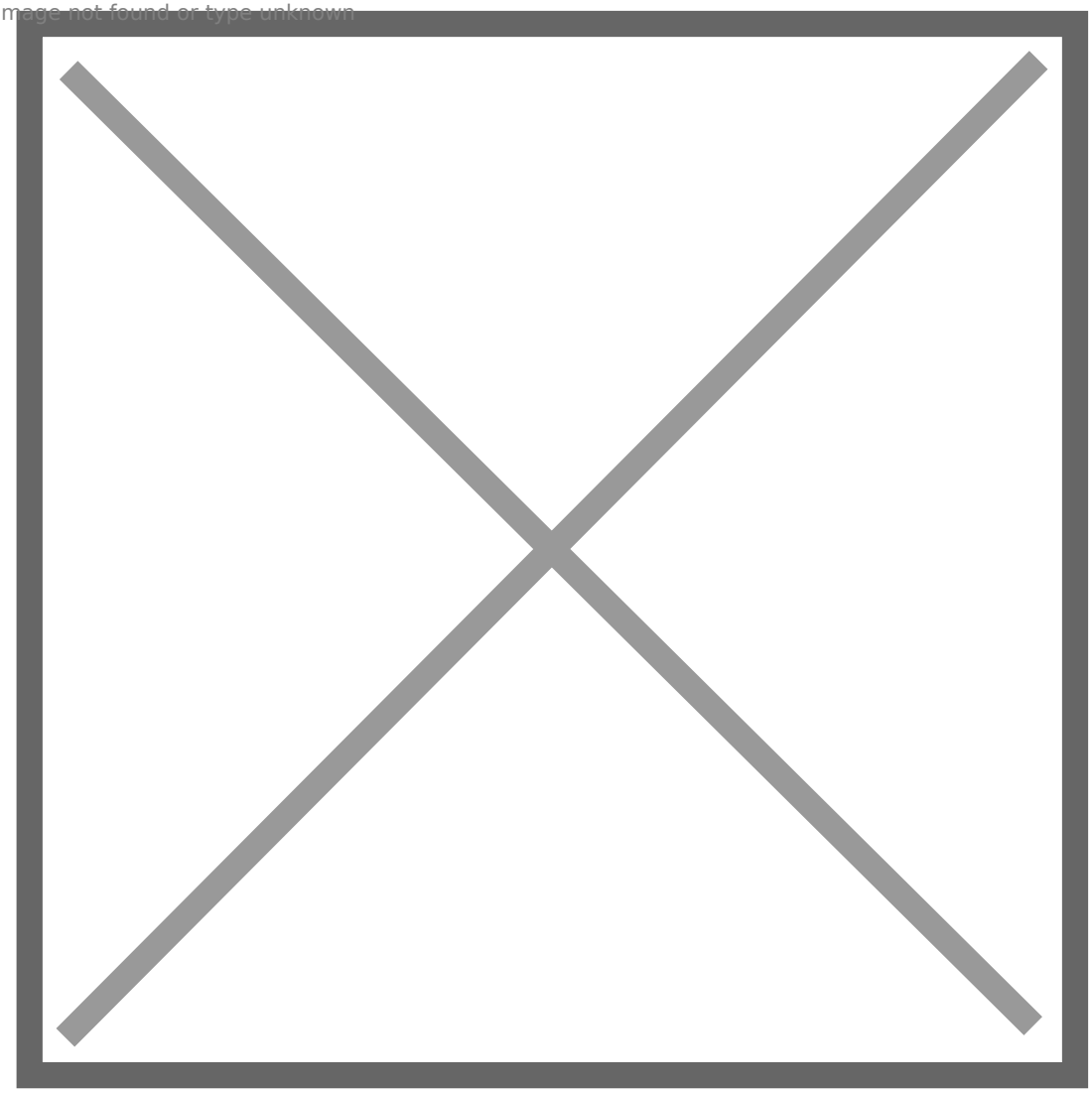
1. Click "Catalogue"

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2. Click the "Product Search:" field.

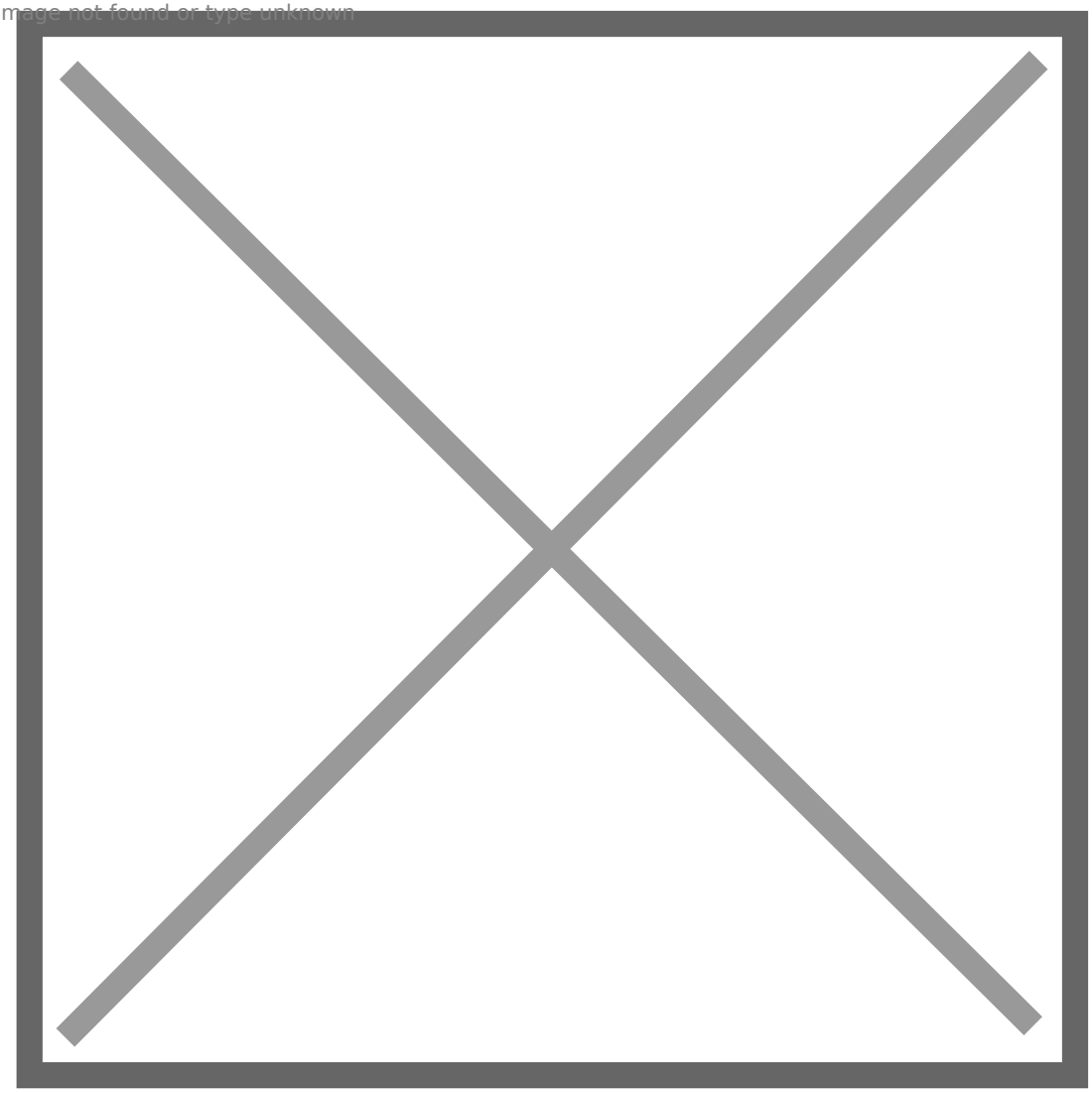
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3. Type the product you are looking for in to the search field. In this example we've used "strawberry".

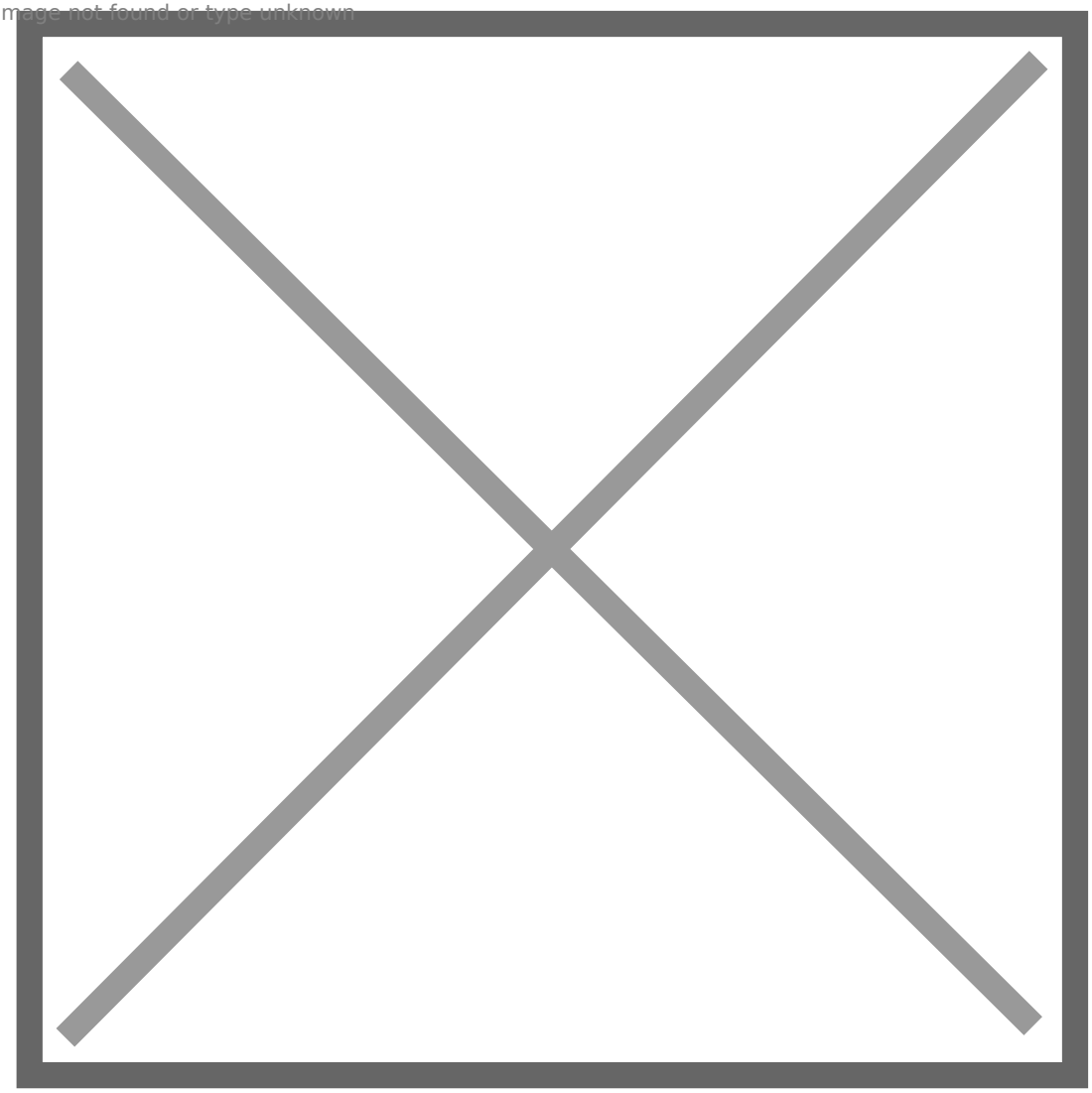
4. Click 'Search'

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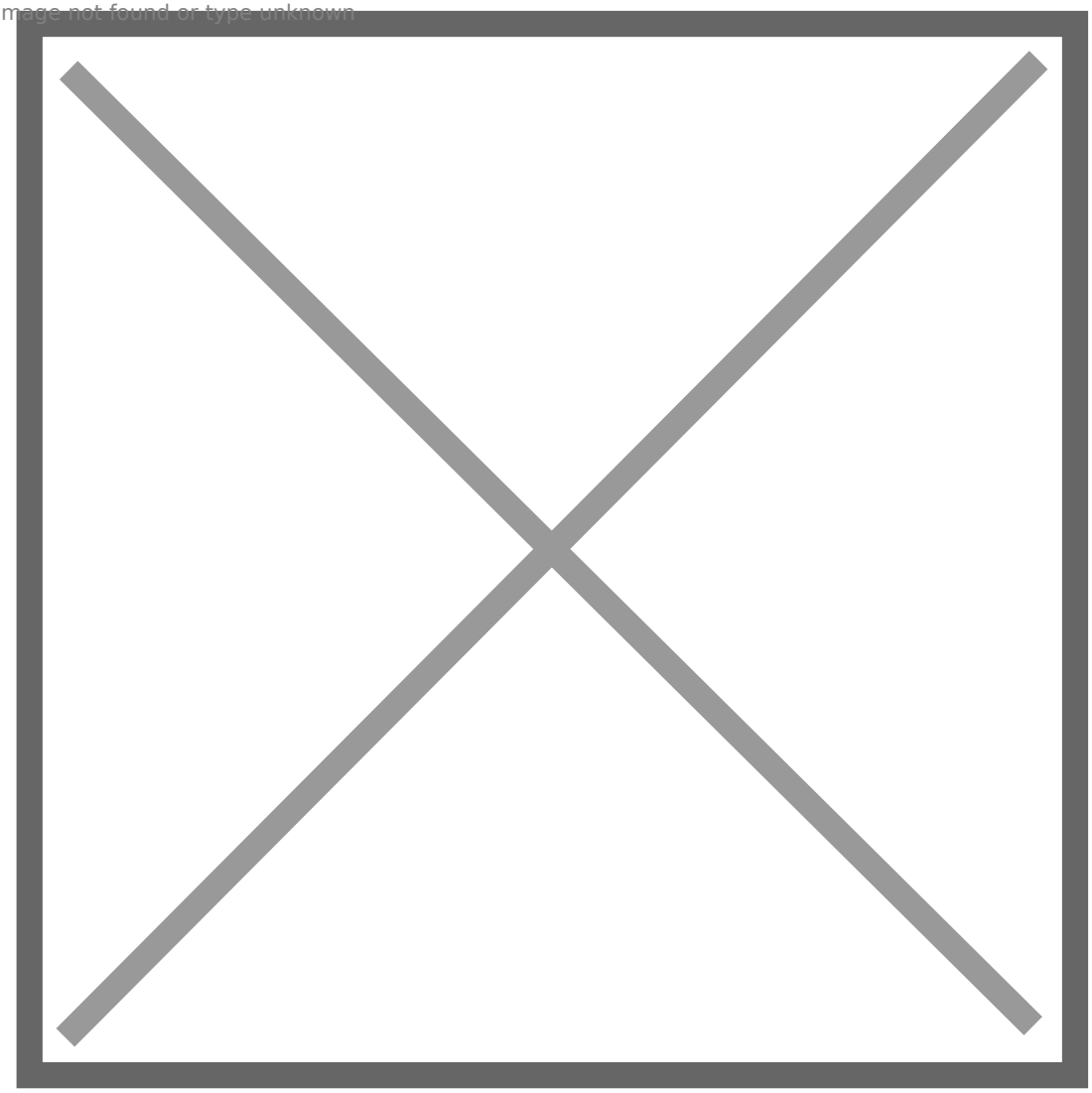
5. Click the 'Edit' icon

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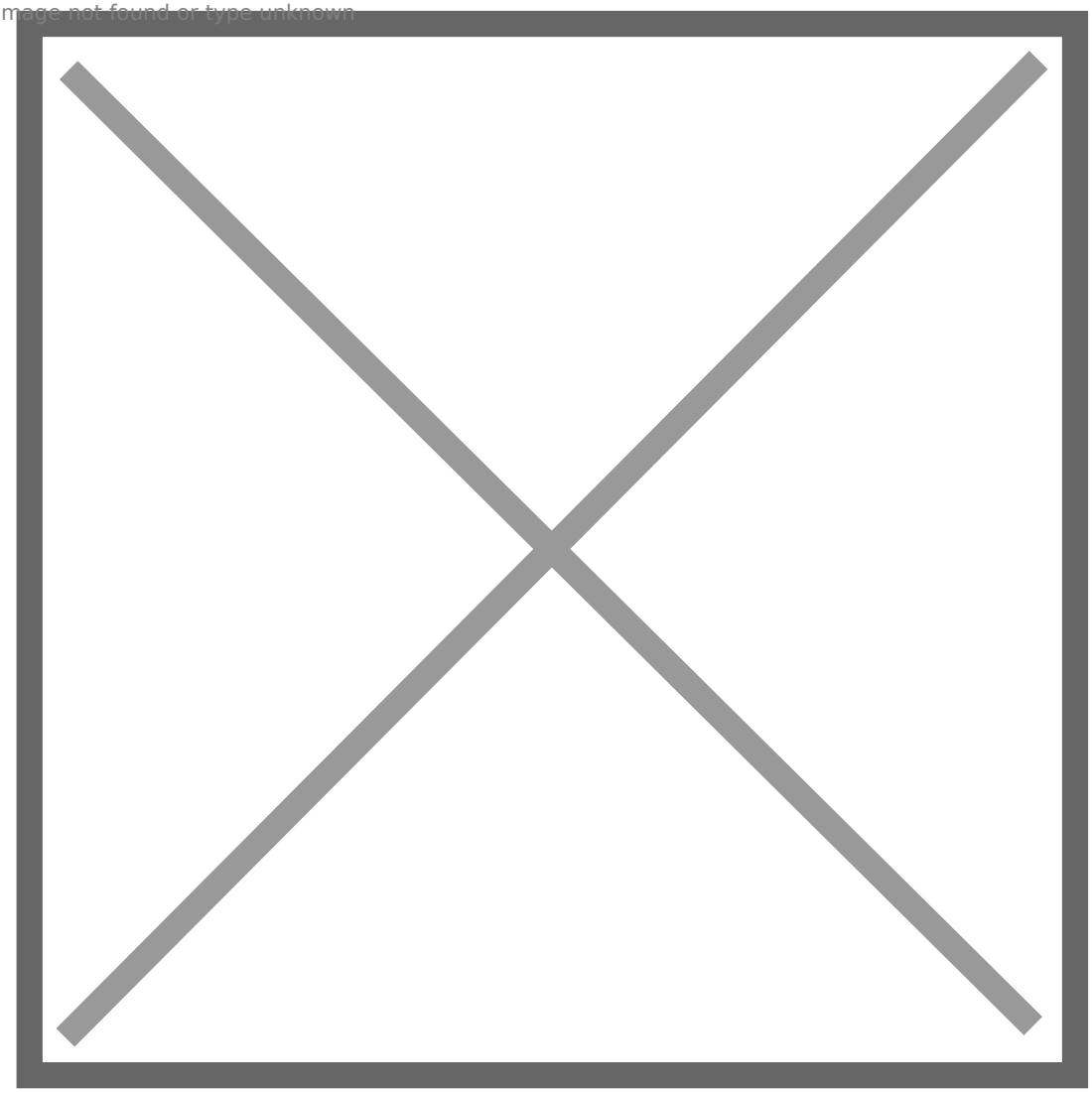
6. Scroll to the bottom of the page and click "delete product"

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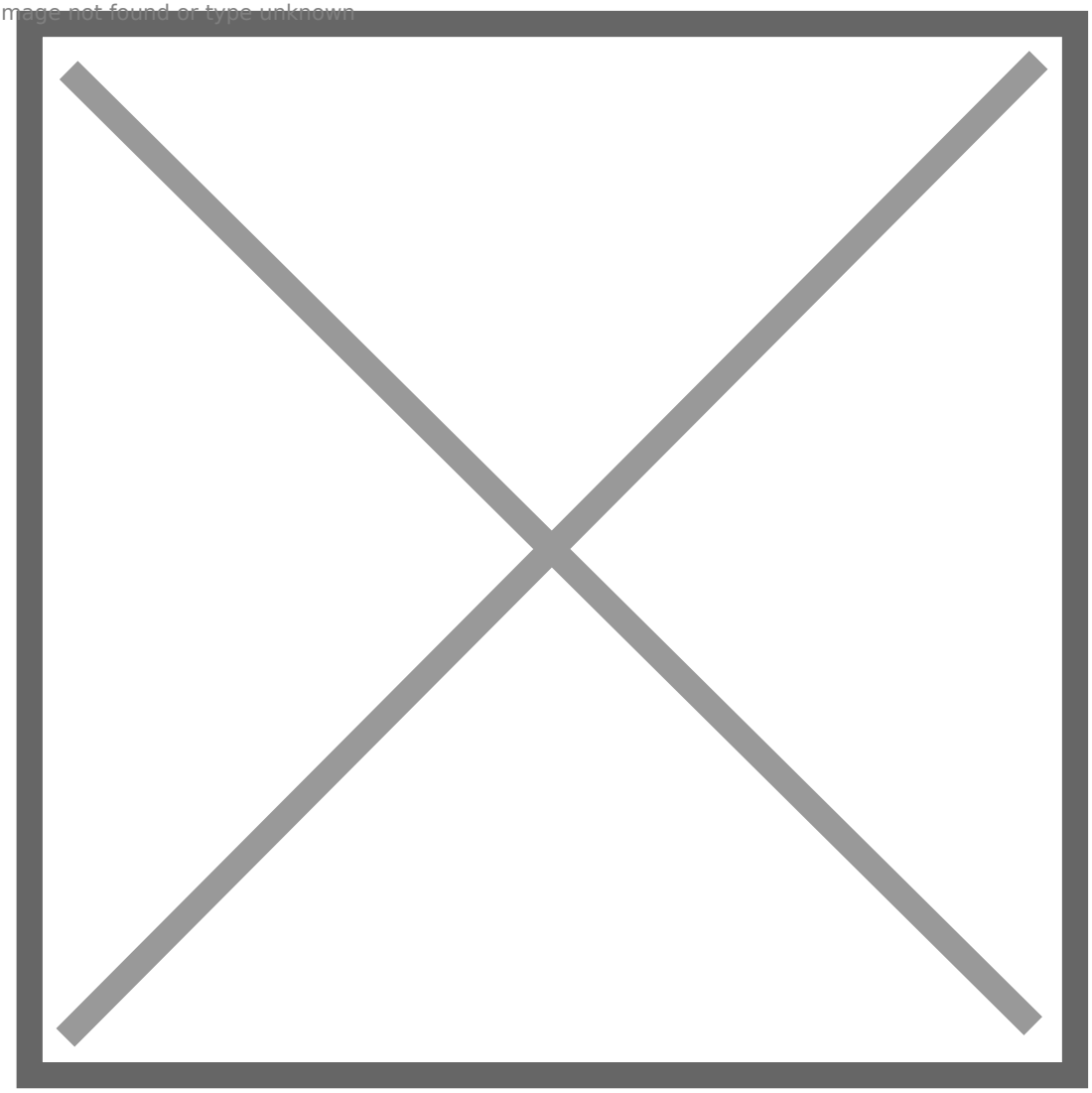
7. A popup will open asking if you are sure you want to delete this product - if you are happy, click 'OK'

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8. You will receive a confirmation message in the top right of the browser advising 'Product was deleted'

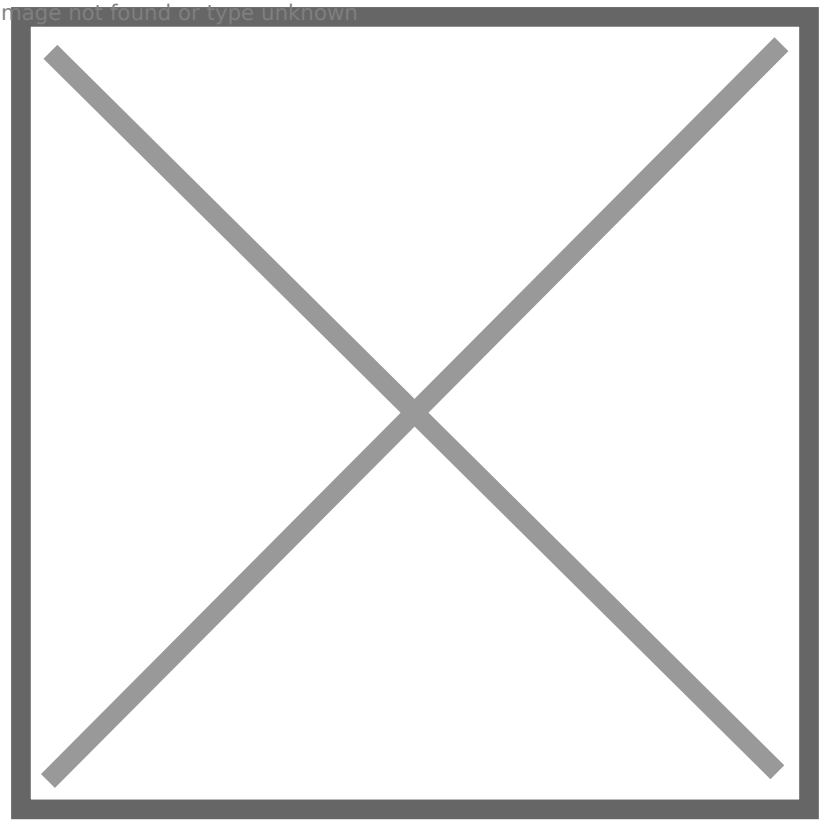
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Copying a Product

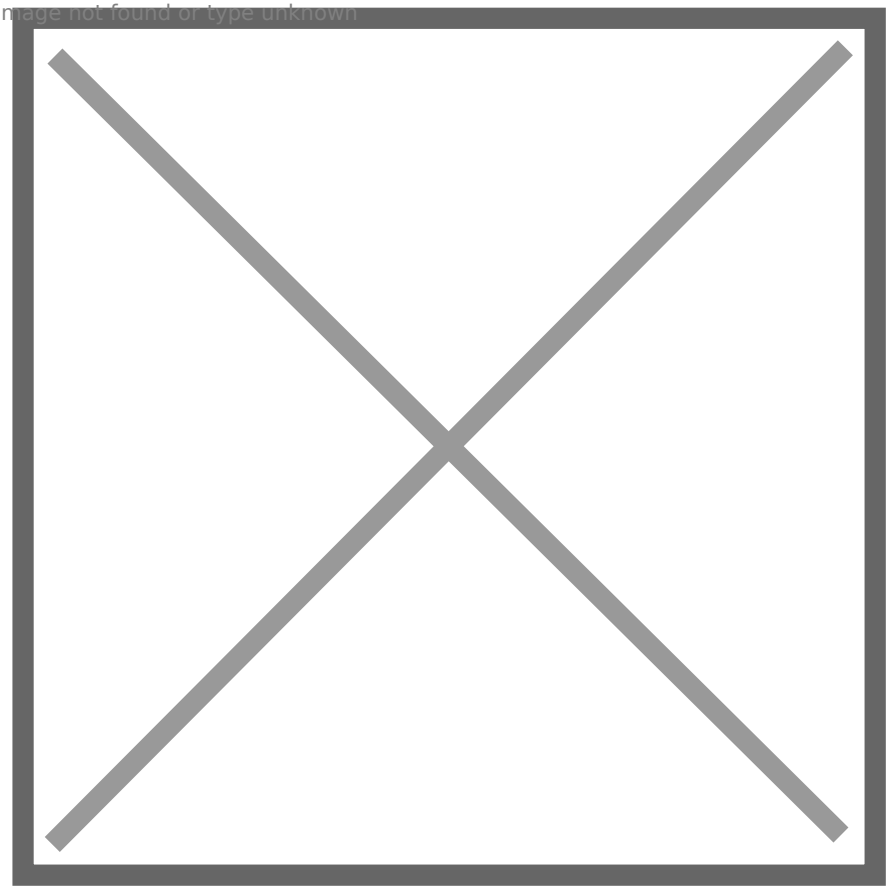
1. Click "Catalogue"

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2. Click the "Product Search:" field.

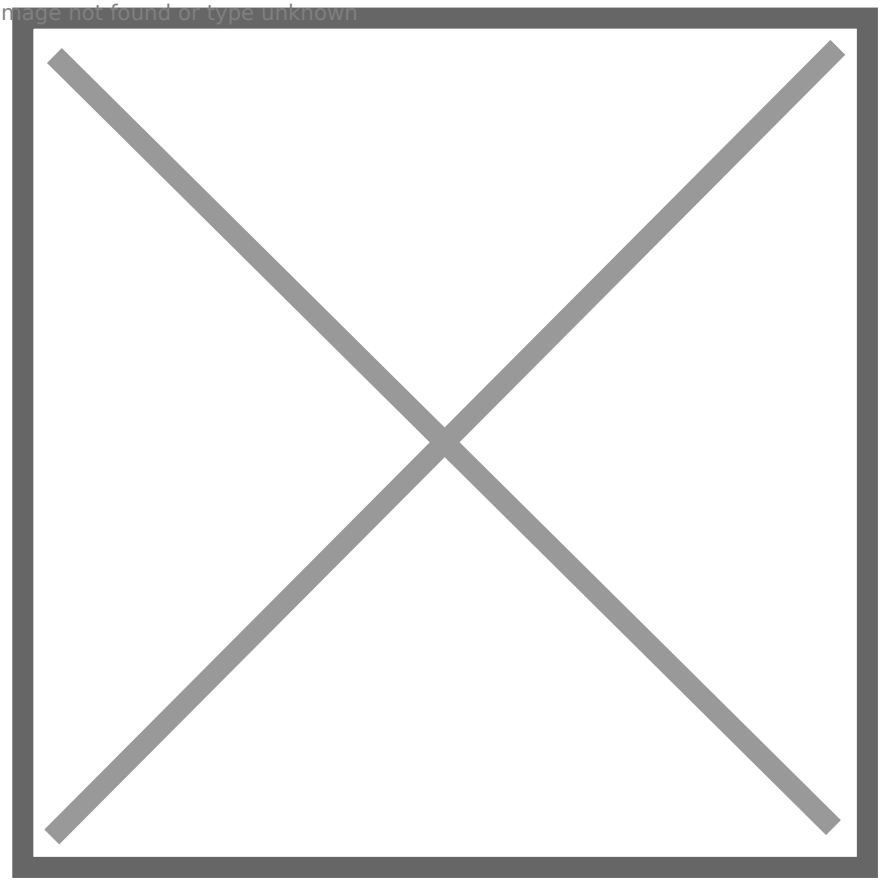
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3. Type the product you are looking for in to the search field. In this example we've used "strawberry".

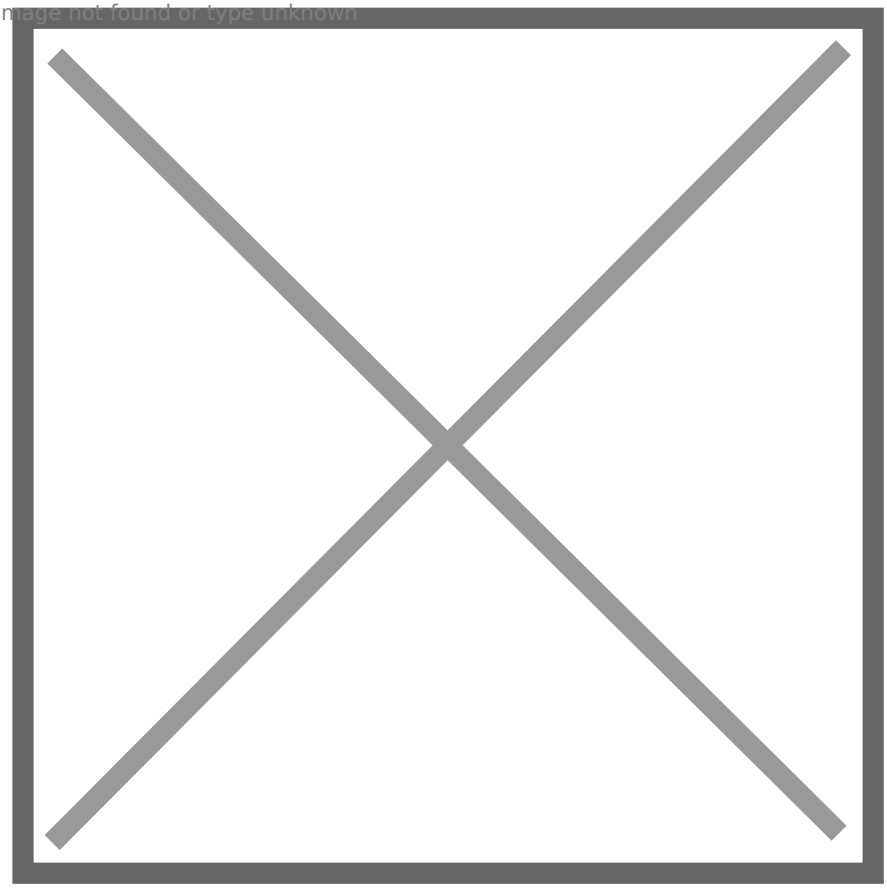
4. Click 'Search'.

Image not found or type unknown



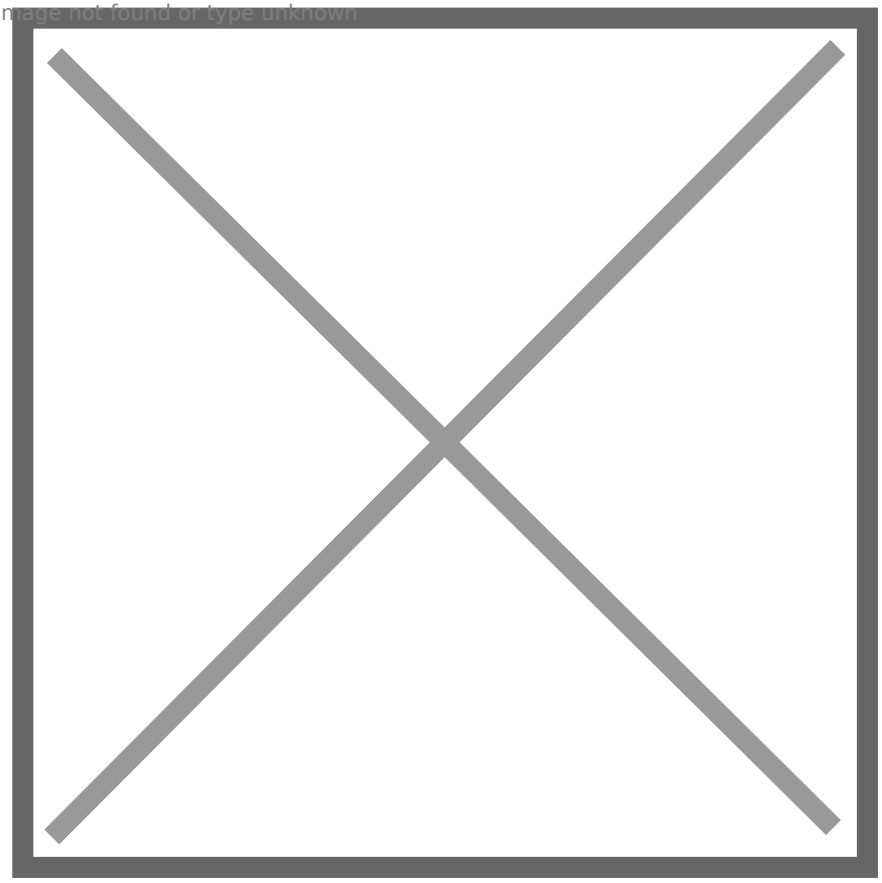
5. Once you've found the product you wish to copy, click the blue copy icon.

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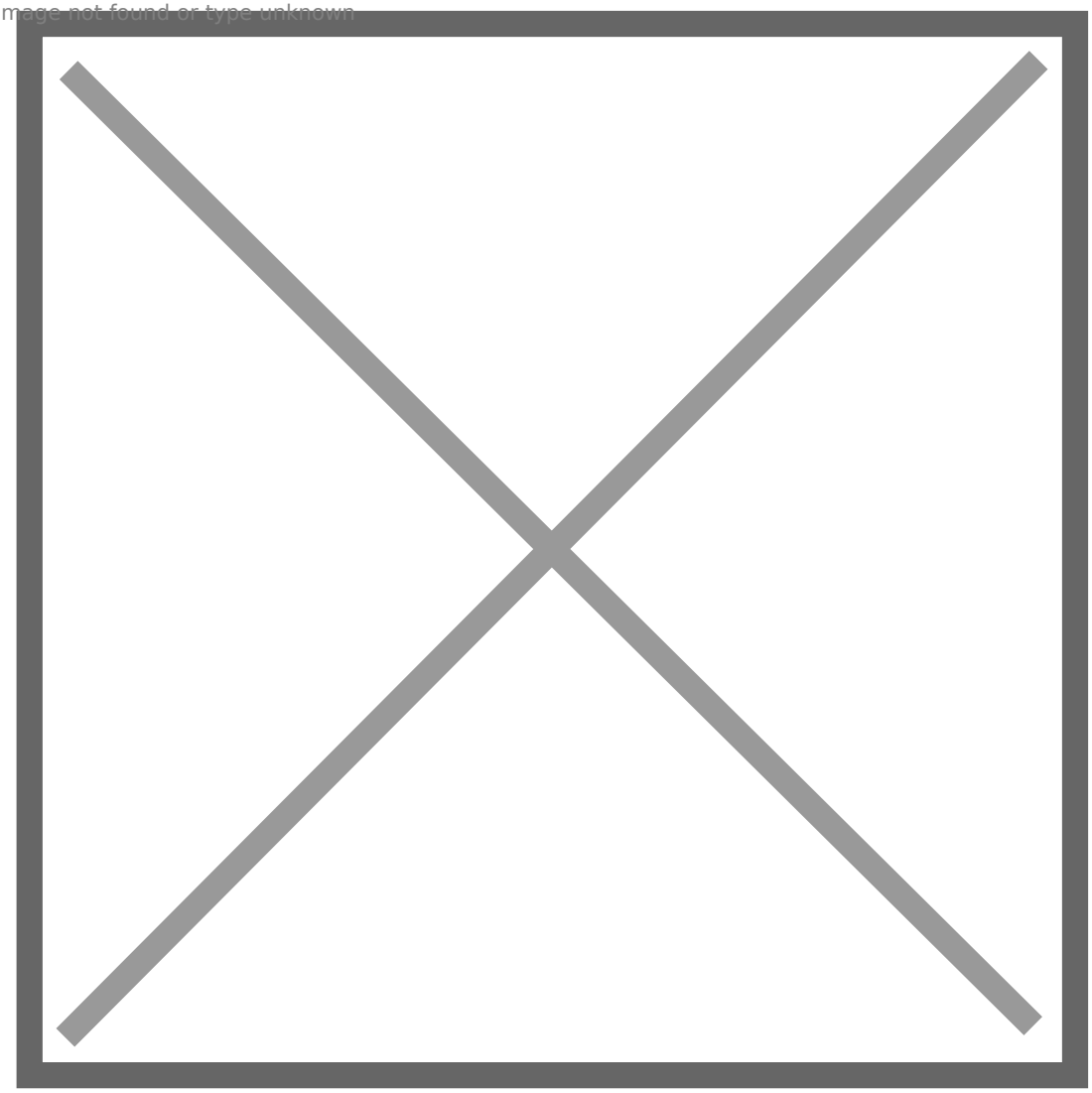
6. You will receive a popup asking if you are sure you want to make a copy. If you are happy, click 'OK' to continue.

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7. A copy of the product will now be created. It will have the same name with a 'COPY' suffix.

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How to make bulk changes to Products from the Category screen in the CMS

tick boxes