How to Set Up Product Code Attributes

This process uses product attributes which can be used in different ways for different end-user experiences.
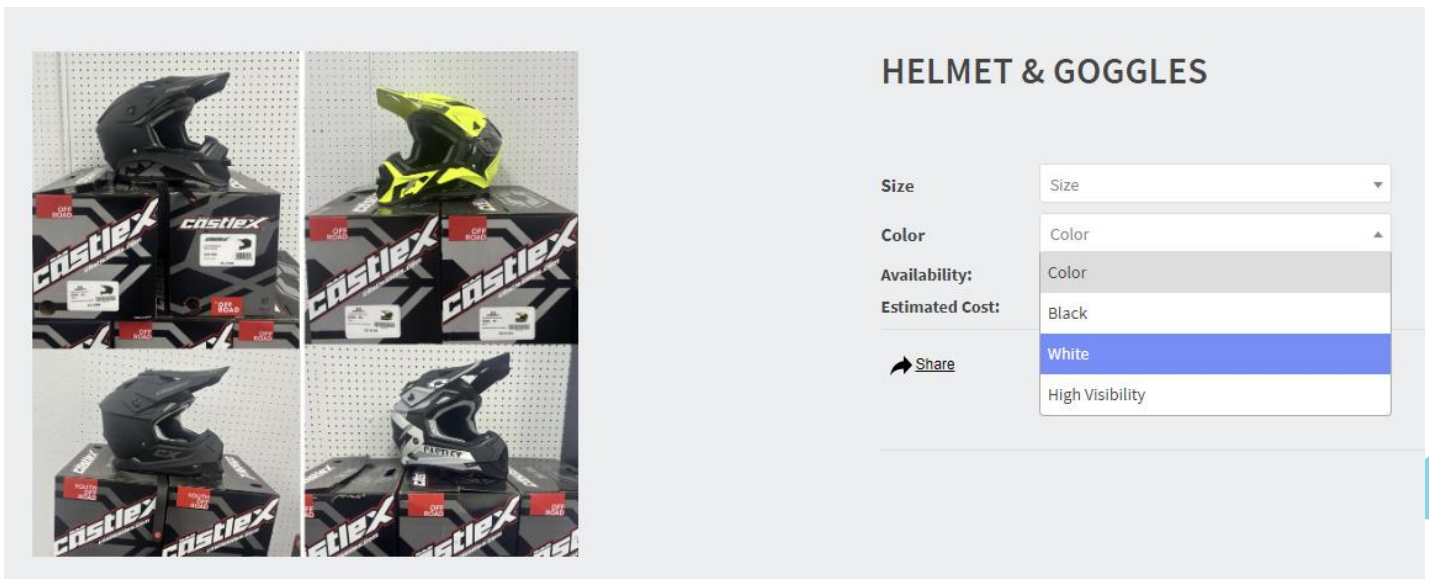
We will use the **User Defined** type of **Product Attribute function** to offer your customers the convenience of visiting one product code page to select an asset which may come with varying attributes (length, height, power output, etc). Note: the attribute values will be tied to separate assets.. for example, an XL & Black Helmet has it's own rental asset master ID in integraRental and a separate availability than say a Small White Helmet.

For this walkthrough we will be working with a rental for helmets and goggles and adding product attributes to these product codes.

This guide includes instructions to set up product filters both manually and via import

- Configuring an Attribute Set (both manually and via import feature)
- Assigning Attribute Sets (i.e. Size, Color) and Values (i.e. White, Black, Large, XL etc)

Example product code page with two attribute sets configured and mapped to separate assets.. showing availability for each, depending on what is selected by the user.
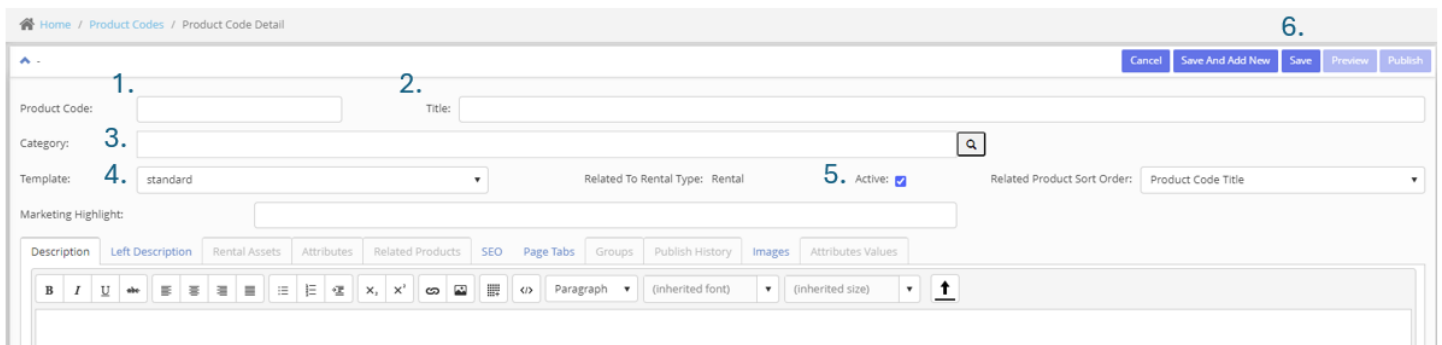
Assigning Multiple Rental Assets to a Single Product Code Page

Before setting up the Product Attributes, you will need to create a brand new product code page. This new product code page will have multiple rental assets assigned to it.. and be the "hub" page of all of the attributes you allow users to select on the eRental site. You can also do this via product import instead if you prefer (see page 8).

Click Product Codes from the menu on the left.

Click Add to open up a blank product code page you can customize.
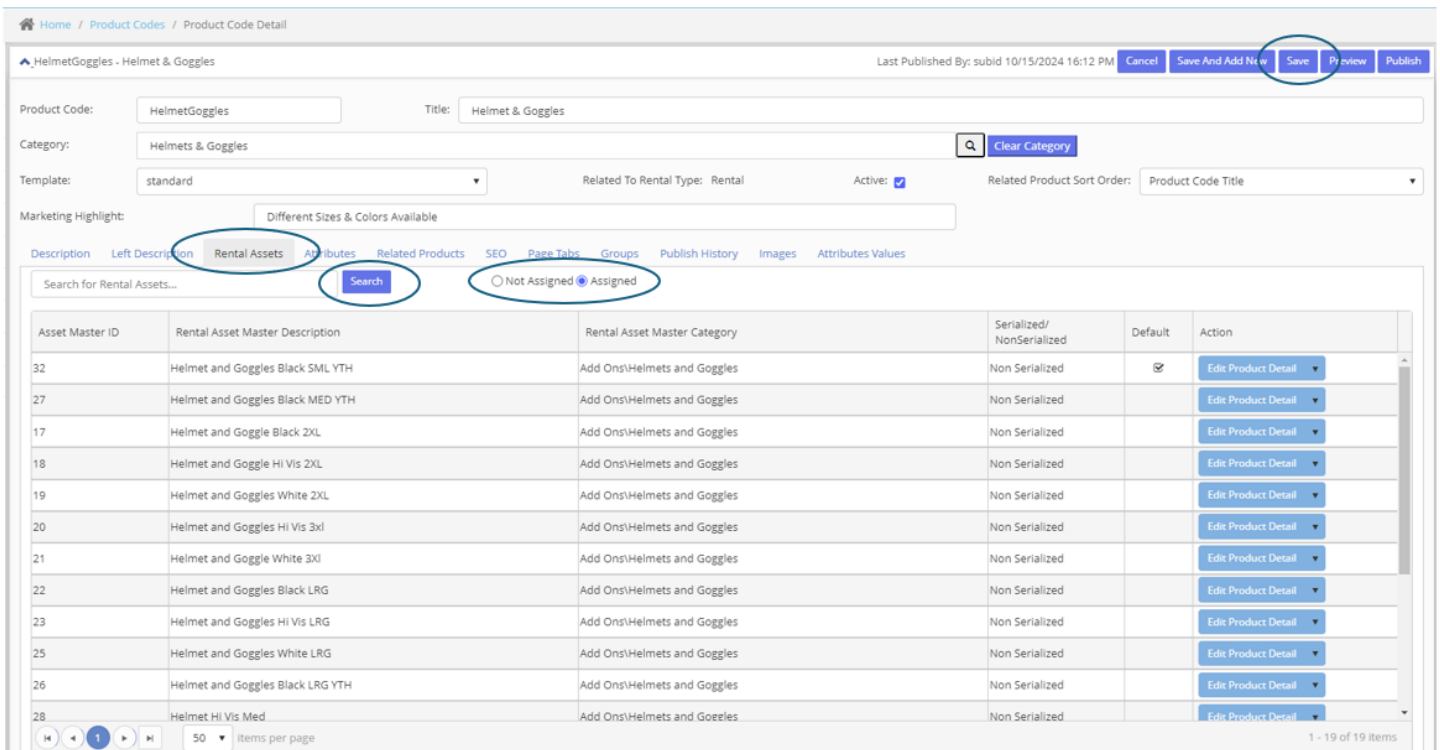
You will need to fill out the following info before adding rental assets to this page.

1. **Product Code** – typically the product code page ID is the exact same number as the rental asset master id assigned to it. Since we will be adding multiple rental assets to this page, it is wise to avoid using only numbers, opting to title it something along the lines of "HelmetGoggles" or "GenieScissors" etc.
2. **Title** – this is the product code page title
3. **Category** – this is the category where this product code page will live
4. **Template** – you can keep this as standard unless you want to include Optional/Required Add On related products, in which case the template should be changed to: DefaultWithAddOns
5. **Active Checkbox** – while you are working on building the page, you may want to uncheck this box for now, rechecking the box when you are ready to present the page to your customers.
6. **Save** – Saving the page after filling out the above info, will open access to click the Rental Assets Tab to assign your assets.
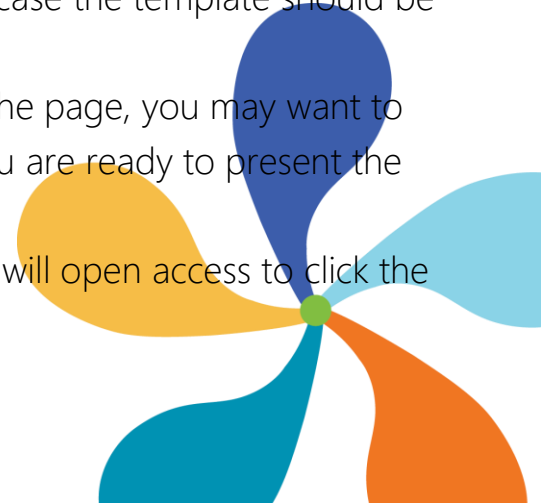
After saving the page, you can access the **Rental Assets tab**.. From here, you'll want to **click the Not Assigned radial button** and **search for assets** you want to **assign to this page**. Assets assigned to the page (if any) will be visible when you select the Assigned radial button. Once you've added all of the assets you want to be selectable via attribute options on the product code page, **hit Save**.

After you've added the rental assets to this one product code page, you can now set up the product attributes that you'll need for this page to function as shown on the first page of this guide.
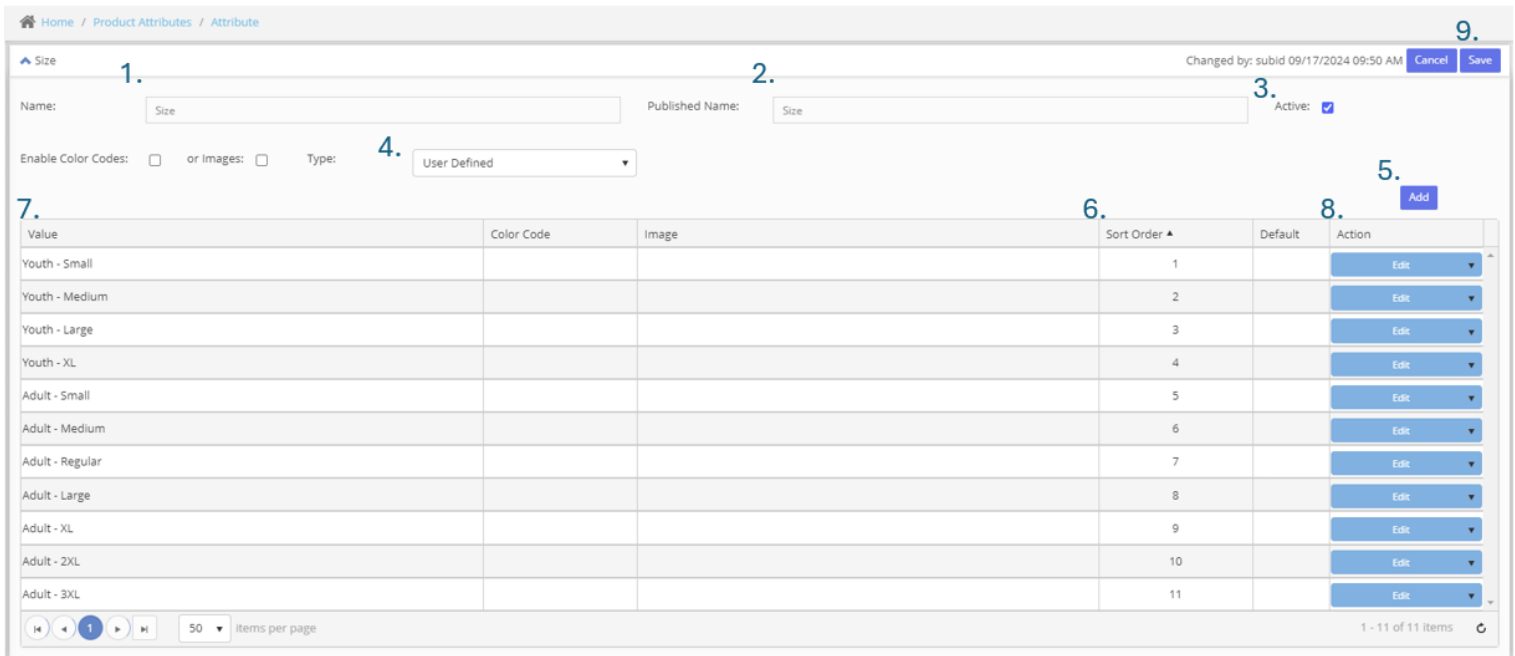
Configuring an Attribute Set Manually

Log into **iNextAdmin**

Click **Product Attributes** from the left-hand menu

Click the **Add** button and you'll see the screen below to create a "set" of attributes:

1. **Name** – this is the internally referenced name of the attribute set; it can usually be the same as the published name.
2. **Published Name** – this is the published name of the attribute set, which will show on the eRental site to customers.
3. **Active** – this checkbox determines if the attribute set is active or not. Checked = Active
4. **Type** – Set this to Filter and Info for the filter type of functionality from the category page view on the eRental site.
5. **Add** – Click the add button to add Values to the set, these will be referenced later.
6. **Sort Order** – Typically alphanumeric, you can also change the order this set of attributes is listed on the eRental category page(s).
7. **Value** – This is the variable a user will see and filter by, in this example, they are different manufacturers of mini skids
8. **Action** – Click edit to change the value and sort order fields. Click delete to remove.
9. **Save** – Click this button to save your progress and/or completed attribute set.

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Configuring an Attribute Set via Importing

Note: Including this as informational.. you may skip this step and go directly to importing product codes with attribute data as detailed on page 8 as you can create new attribute sets that way as well.

Open excel and create a .CSV file with the following header row template

	A	B	C	D	E	F
1	attributeValue	activeInactive	fieldName	dataType	publishedName	sortOrder
2	Youth - Small	Active	Size	User Defined	Size	1
3	Youth - Medium	Active	Size	User Defined	Size	2
4	Youth - Large	Active	Size	User Defined	Size	3
5	Youth - XL	Active	Size	User Defined	Size	4
6	Adult - Small	Active	Size	User Defined	Size	5
7	Adult - Medium	Active	Size	User Defined	Size	6
8	Adult - Regular	Active	Size	User Defined	Size	7
9	Adult - Large	Active	Size	User Defined	Size	8
10	Adult - XL	Active	Size	User Defined	Size	9
11	Adult - 2XL	Active	Size	User Defined	Size	10
12	Adult - 3XL	Active	Size	User Defined	Size	11

attributeValue – this field will be mapped to the attribute Value

activeInactive – you will want to fill out each row's column with Active

fieldName – this is the internal name, can be the same as published name

dataType – set this column's cells to User Defined as shown above

publishedName – this is the external name of the filterable values on the eRental site

**sortOrder** – you can list the order in which you want the attribute Values to be listed

Note: you can name the header of the columns whatever you want, but this is a good way to keep track of what is what in correlation to the import mapping process.

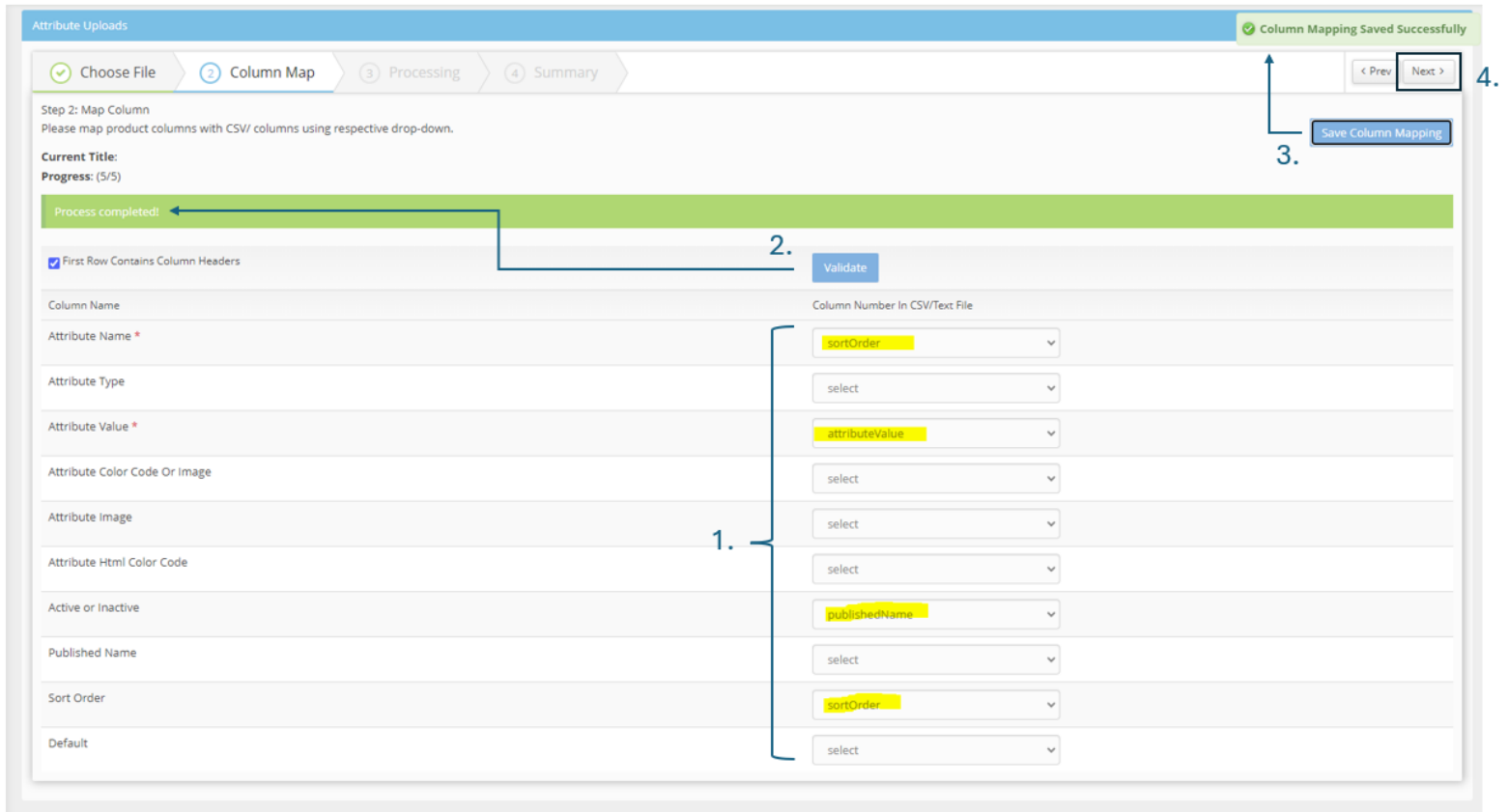Once your CSV is complete, you can import into the software.. go to…
iNextAdmin > Import/Export > Import Attributes >
Select File button > Next button > Set up Mapping > Validate > Import

Note: if you include special characters in the .CSV document name, the software will not accept the sheet for import and you will not see column headers in the drop down on the mapping screen.
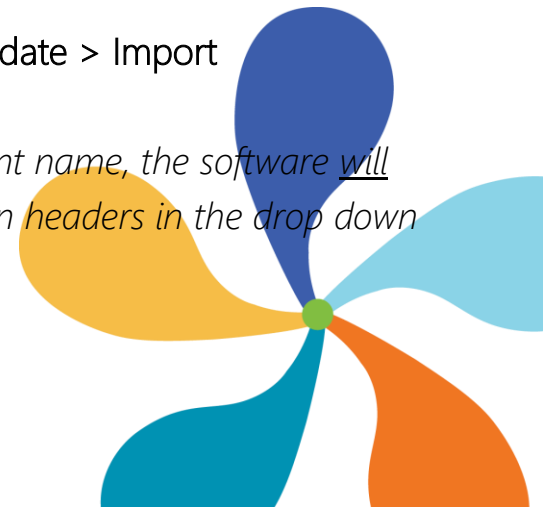
Map the .CSV column headers to the appropriate values, as shown below.
Click the **Validate** button, and (optional) **Save Column Mapping** for future imports
Click **Next** to go to the next screen and confirm the import.
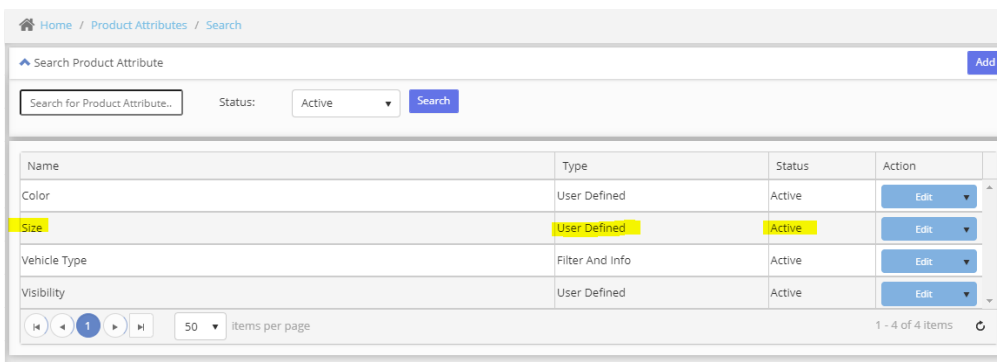
Once you receive the import successful message, you can view/ensure the import was successful and correctly mapped by going to the Product Attributes from the left-hand menu, clicking search, and opening (click edit) the set of data you just imported.
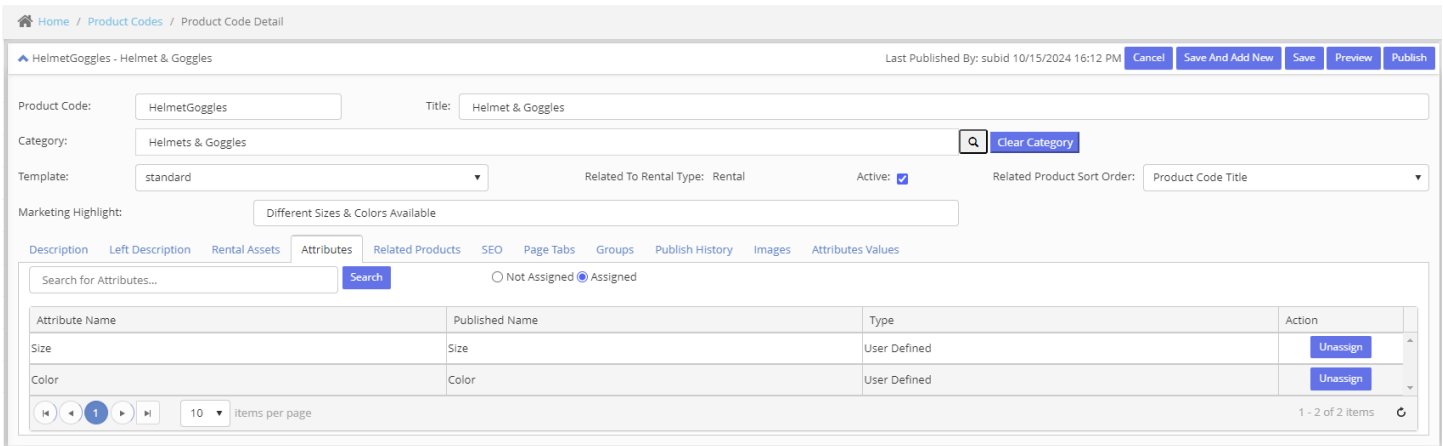
Assigning Attribute Sets & Values to Rental Assets Manually

From a Product Code Page...

1. Attributes Tab
2. Click Not Assigned Radial Button
3. Click Search
4. Click the Assign Button
5. You will see the attribute name disappear from the Not Assigned list.

Click the Assigned radial button and you will see the assigned attribute set(s).
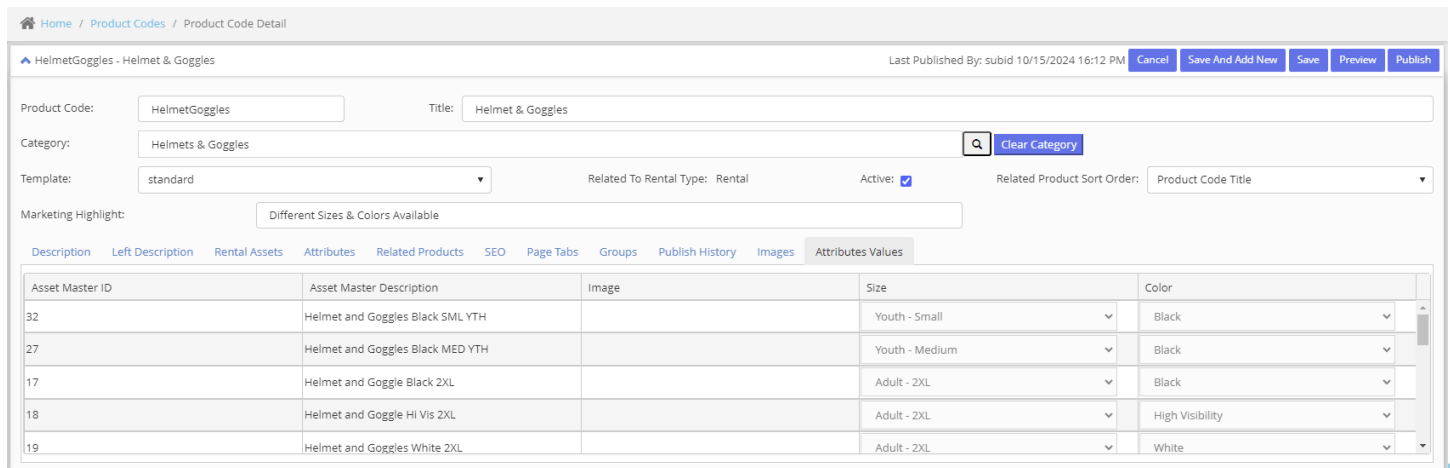
Click the **Attributes Values Tab** to see the Attribute Value(s), labeled by Attribute Name in the Column Header, for each assigned asset master ID, from the dropdown.

Once complete, in the top right of the product code page detail..

Click Save, and then Click Publish

Assigning Attribute Sets & Values to Rental Assets via Import

Note: It's recommended to work in chunks like categories or subcategories until you are comfortable with the process to do large imports.

Once you've set up the import .CSV file, you'll need to use the Import Products function to map the attributes.. therefore, <u>it is highly recommended to start with the .CSV file you can retrieve by exporting via Export Product Codes</u>, and then delete the columns you do not need to map/import, and add the columns you do need to import (shown below).

Note: if you skipped the steps on pages 2-4 to create attribute sets, you can actually CREATE attribute sets via this import.. You can also create brand new product code pages via this import.

Starting with the product code export .CSV file...

Delete all columns from the product code export <u>except</u>..
productCode, erpProductNumber, categoryPath, and productTitle

Add columns..
attributeName, attributePublishedName, attributeType, and attributeValue

Note: to add multiple attributes, create additional columns:

attributeName-2, attributePublishedName-2, attributeValue-2
attributeName-3, attributePublishedName-3, attributeValue-3
...and so forth

Pro Tip: While mapping the import, you can reuse the attributeType column additional lines of attributes since they will all be type: User Defined.

Pro Tip: If your attribute's set internal name and published name will be the same you can just use one column for attributeName and map accordingly to both Name and PublishedName
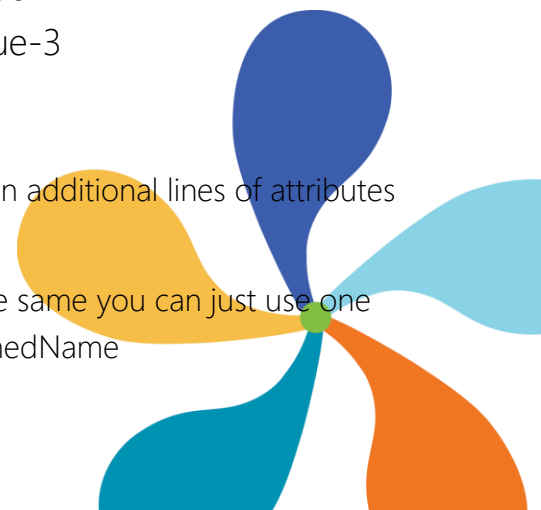
Add data for the new columns:

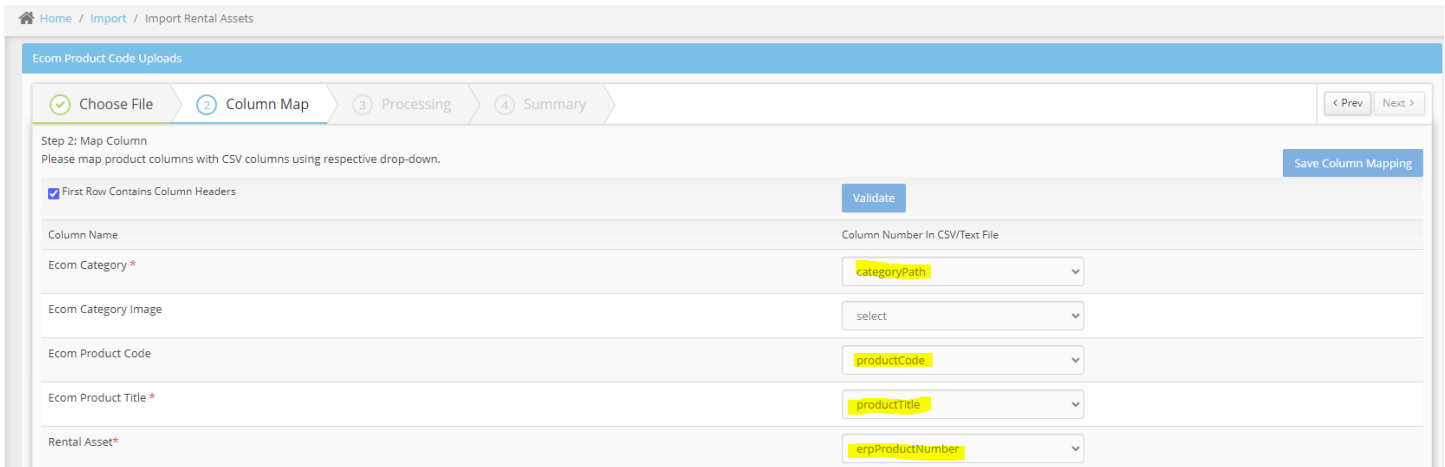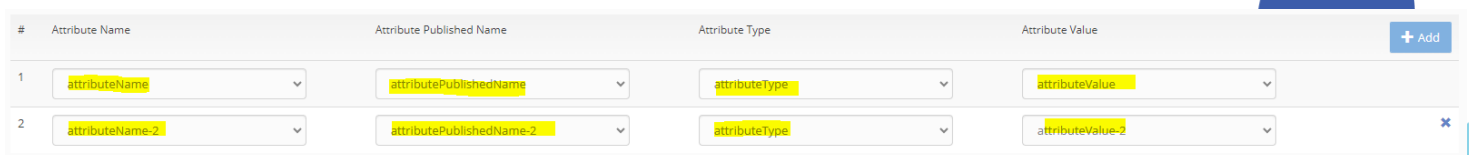|	A	B	C	D	E	F	G	H	I	J	K
1	productCode	erpProductNumber	categoryPath	productTitle	attributeName	attributePublishedName	attributeType	attributeValue	attributeName-2	attributePublishedName-2	attributeValue-2
2	HelmetGoggles	25	Accessories	Helmet & Goggles	Size	Size	User Defined	Adult - Large	Color	Color	White
3	HelmetGoggles	19	Accessories	Helmet & Goggles	Size	Size	User Defined	Adult - 2XL	Color	Color	White
4	HelmetGoggles	26	Accessories	Helmet & Goggles	Size	Size	User Defined	Youth - Large	Color	Color	Black
5	HelmetGoggles	28	Accessories	Helmet & Goggles	Size	Size	User Defined	Adult - Medium	Color	Color	High Visibility
6	HelmetGoggles	29	Accessories	Helmet & Goggles	Size	Size	User Defined	Adult - Medium	Color	Color	White
7	HelmetGoggles	31	Accessories	Helmet & Goggles	Size	Size	User Defined	Adult - Small	Color	Color	Black
8	HelmetGoggles	33	Accessories	Helmet & Goggles	Size	Size	User Defined	Adult - Small	Color	Color	High Visibility
9	HelmetGoggles	34	Accessories	Helmet & Goggles	Size	Size	User Defined	Adult - XL	Color	Color	Black
10	HelmetGoggles	35	Accessories	Helmet & Goggles	Size	Size	User Defined	Adult - XL	Color	Color	High Visibility
11	HelmetGoggles	36	Accessories	Helmet & Goggles	Size	Size	User Defined	Adult - XL	Color	Color	White
12	HelmetGoggles	37	Accessories	Helmet & Goggles	Size	Size	User Defined	Youth - XL	Color	Color	Black
13	HelmetGoggles	23	Accessories	Helmet & Goggles	Size	Size	User Defined	Adult - Large	Color	Color	High Visibility
14	HelmetGoggles	22	Accessories	Helmet & Goggles	Size	Size	User Defined	Adult - Large	Color	Color	Black
15	HelmetGoggles	21	Accessories	Helmet & Goggles	Size	Size	User Defined	Adult - 3XL	Color	Color	White
16	HelmetGoggles	20	Accessories	Helmet & Goggles	Size	Size	User Defined	Adult - 3XL	Color	Color	High Visibility
17	HelmetGoggles	18	Accessories	Helmet & Goggles	Size	Size	User Defined	Adult - 2XL	Color	Color	High Visibility
18	HelmetGoggles	17	Accessories	Helmet & Goggles	Size	Size	User Defined	Adult - 2XL	Color	Color	Black
19	HelmetGoggles	27	Accessories	Helmet & Goggles	Size	Size	User Defined	Youth - Medium	Color	Color	Black
20	HelmetGoggles	32	Accessories	Helmet & Goggles	Size	Size	User Defined	Youth - Small	Color	Color	Black

After you've saved your .CSV file *(if you include special characters in the document name, the software will not accept the sheet for import and you will not see column headers in the drop down on the mapping screen)* and are ready to upload the document, go to:

iNextAdmin > Import/Export > Import Product Codes > Select File > Map the Columns

Set the mapping as above, and then scroll down the screen to the attribute mapping section:

Note: Click the Add button to add additional lines of attributes to match your .CSV file. In this example, we have two attribute sets we are adding to these assets.

Scroll back up and click the Validate button and then click Next to continue with the import.

After successfully importing, you can go to product pages and view the Attributes tabs to confirm it was mapped/imported correctly.

If importing a large amount of attributes, you can also quickly verify data by exporting product code data and scrolling over to the column headers for attributes.

iNextAdmin > Import/Export > Export Product Codes > wait for product data to load > Export to .CSV

If everything looks good, make sure your new product pages are marked as Active (if you unchecked that box when doing it manually), run a full site publish, and hard refresh the eRental site with CTRL+F5 to view the changes. If you're not seeing the changes, try opening your site in an incognito window, or clearing your cache and cookies and reload the website.

iNextAdmin > Site > Publish UI > Click Publish Rental Site (in bottom left corner)

If you have any questions or issues, please reach out to your Digital Experiences consultant or the support team through the usual channels.