Accelerate – Excel Data Sheets & Product Image Management

ACCELERATE

How many data sheets do I have to fill out to set up my Accelerate site?

There are 3 Excel Sheets used to build your site data.

They are best filled out in the following order:

1. Products
2. Inventories
3. Customers

-- Ultimately the number of products you wish to upload will determine how long it takes you, but a lot of the work is repetitive in copying existing data, which will save you time if you've properly prepared.

Download the Excel Sheet template files from the Connect Data section

You'll need to download each of the 3 blank sheets. The sheets have only the column headers. **DO NOT ALTER THE COLUMN HEADERS** on any sheet.

Customer

To add new customer you can do it by downloading customer excel template and upload here.

⬇ Download Excel Template   ⬇ Download Excel Template with existing data

> 1. The first time you download the Template, use the first link to get the blank file.
>
> 2. Later, when you need to make adjustments, or add new items, use the 2nd link to download the Excel file with existing data.
>
> ** It is important to always remember, any data sheet you upload will OVERWRITE the existing (previous) data for that section.
>
> ** So if you have 50 products, and then you upload a sheet with only 2 new items, those other 50 will disappear. You must add the 2 NEW items, to the same sheet with existing 50 items

Section 1: Product Data Sheet

Tips for Preparing your Product Data

Follow these steps and best practices:

1. Determine which Categories of Products, and how many of each you want to feature on your site.

    -- This goes a long way in determining the scope of effort as you move through your setup.

    -- Perhaps pick a specific Line or Season to feature and build your list.

    -- It's also important to think about how many color variants to include.

2. Determine your Category, Color, Gender, and Season Names

    -- **Make. A. List.** Do this in Excel or on paper somewhere for reference.

    -- It's helpful to have the confirmed spellings in a separate reference document to minimize data entry errors.

    -- You'll want to avoid slightly different spellings of the same term, such as Shirt and Shirts, or Light Blue and Lt Blue.

    -- Every unique term will create a new searchable option, so we want to limit redundancies

    -- Make yourself a list like this one

Category	Color	Gender	Season
Accessories	Blue Mist	Men	Spring 2021
Outerwear	Evergreen	Women	Fall 2021
Polos	Sunbright		
Pants	White Navy		
Sweaters	Black		
Vests	Navy		
	Shark Grey		
	White		
	Aqua		
	Bamboo		
	Sandstone		
	Steel Grey		
	Field Poppy		

Example of a Planning List for Product Entry

1. Category: 6 unique, no dupes, no variations
2. Color: 13 unique, all properly formatted
3. Gender: 2 options
4. Season: 2 options

3. There are 6 required fields. Without this bare minimum data for each product, your import will not be successful.

    1. ProductNumber – this is the Sku or product code.
    2. ProductName – text name of the Product
    3. Color – this is a variant / attribute that can be used as a filter.
    4. Category – The Parent grouping of item type (Pants, Hats, etc)
    5. WholesalePrice – the B2B price, what your buyers pay you.
    6. SizeCode1 – Every product must have at least 1 size.

4. Here is the list of Optional Fields and their importance:

    1. Gender – highly recommended
       -- Add a gender filter option.
       -- Values should be consistent, do not mix in Womens and Ladies
       -- If you go with "W" for Womens, use that the whole way through.

    2. Season – highly recommended
       -- We all know what Seasons are in the apparel industry
       -- Just make sure you are consistent in your data.
       -- Spring 2021 vs Spr21. Fall 2021 vs F21.
       -- Again, just pick one format and roll with it.

    3. LongDescription -- recommended
       -- A picture is worth 1000 words… but clever wording sells too!
       -- Describe your product with catchy, marketing-driven text
       -- Or cut straight to the point and give just the important details.

    4. RetailPrice – optional, based on business model
       -- Suggested (perhaps enforced) price for resale.

    5. DiscountedPrice – not necessary in Accelerate
       -- Leave this blank for now

    6. SizeCode2 thru SizeCode20 -- optional
       -- You'll use these on a per product basis
       -- Some items may have 3 sizes, some have 10.
       -- Fill them out from left to right, starting with SizeCode1
       -- Leave the higher numbered ones blank if not needed.

Example of what a complete product would look like

Let's walk through one together!

==Required data in yellow==

1. ==ProductNumber = BLT2050==
2. ==ProductName = Knitted Belt==
3. ==Color = Blue Mist==
4. Gender = Men
5. Season = Spring 2021
6. ==Category = Accessories==
7. LongDescription = Sturdy and Stylish woven knit belt. Available in 6 sizes
8. ==WholesalePrice = 49.95== (no $ needed in data sheet)
9. RetailPrice = 94.95
10. DiscountedPrice = blank
11. ==SizeCode1 = 32==
12. SizeCode2 = 34
13. SizeCode3 = 36
14. SizeCode4 = 38
15. SizeCode5 = 40
16. SizeCode6 = 42
17. SizeCode7 thru SizeCode20 = blank

Here's how that looks as a row of data:

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R
1	ProductNumber	ProductName	Color	Gender	Season	Category	LongDescription	WholesalePrice	RetailPrice	DiscountedPrice	SizeCode1	SizeCode2	SizeCode3	SizeCode4	SizeCode5	SizeCode6	SizeCode7	SizeCo
2	BLT2050	Knitted Belt	Blue Mist	Men	Spring 2021	Accessories	Sturdy and Stylish woven	49.95	94.95		32	34	36	38	40	42		
3																		
4																		
5																		

Data Entry Tips and Tricks

1. Build all Color variations for the same ProductNumber in consecutive rows before moving on to a different product SKU

   -- This will allow you to leverage copy and paste for the repetitive parts the data for the same item

   -- **Copy and Paste will save you time. Use them every chance you get!**

2. Try to do all of your items in the same Category at the same time, rather than all throughout the data sheet.

-- Products in the same category are likely to leverage a lot of the same data that you can copy/paste, such as Gender, Color, and SizeCodes.

-- Your sheet will also look much neater overall if you have them grouped by ProductNumber and by Category.

-- It will also help you be efficient in knowing which groups of items you've completed from your internal list that you (hopefully) made beforehand.

Example of Copy and Paste used to create all 4 product colors:

Change the Color data in Column C for the copied products

Bingo! Just like that you've created 4 versions of one item, with the only difference being the Color Code.

Section 2: Uploading Product Data Sheet

Upload your Data Sheet

To upload your completed Product sheet, return to the Admin Dashboard, then click on Connect Data from the left menu.
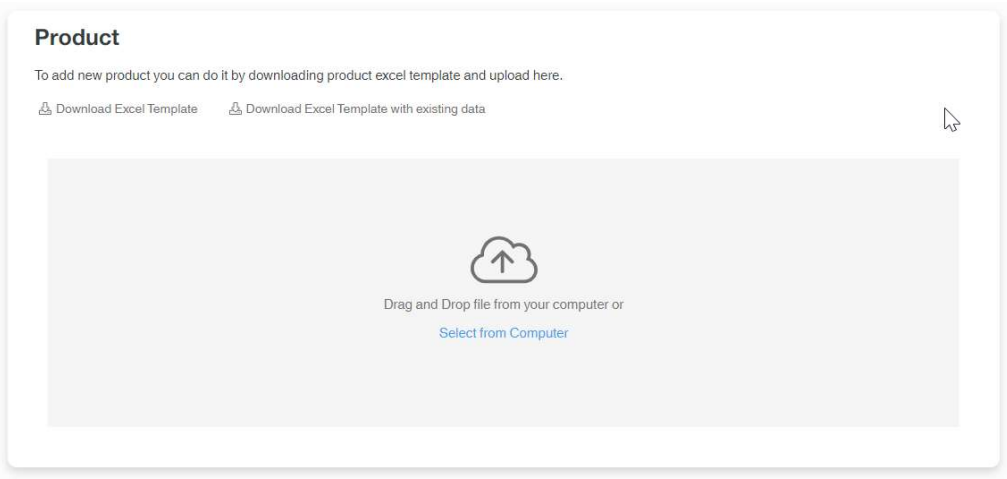
From this screen drop in your Products.xlsx file into the Product area. The process will only take a few seconds.

1. If successful, there will be a success message in the upper right corner
    -- You can verify a successful import of products by going to the Products section of the site and you will see the product data tiles showing there.
    -- The product tiles will not have any images yet, but the rest of the data will be there based on what was in the Excel sheet.

2. If the Products sheet upload was unsuccessful, there will be an error message displayed in red in the upload area.

Possible Errors include:

    -- Missing Column or Unexpected Column Name
    -- Missing Value in a required Column, such as ProductNumber
    -- Duplicate row of data at <row number>
    -- Incorrect file format. Make sure you are uploading a .xlsx file
    -- Make the required changes in the sheet. Save try again.

Section 3: Product Images

What are the Requirements for Product Images?

There are 3 things to remember when preparing your product images for uploading into your site.

1. Accepted Fie Types

    -- We support .JPG and .PNG files for product image

    -- It is recommended that you stick with one type

    -- you cannot mix and match .jpg and .png files within the same product
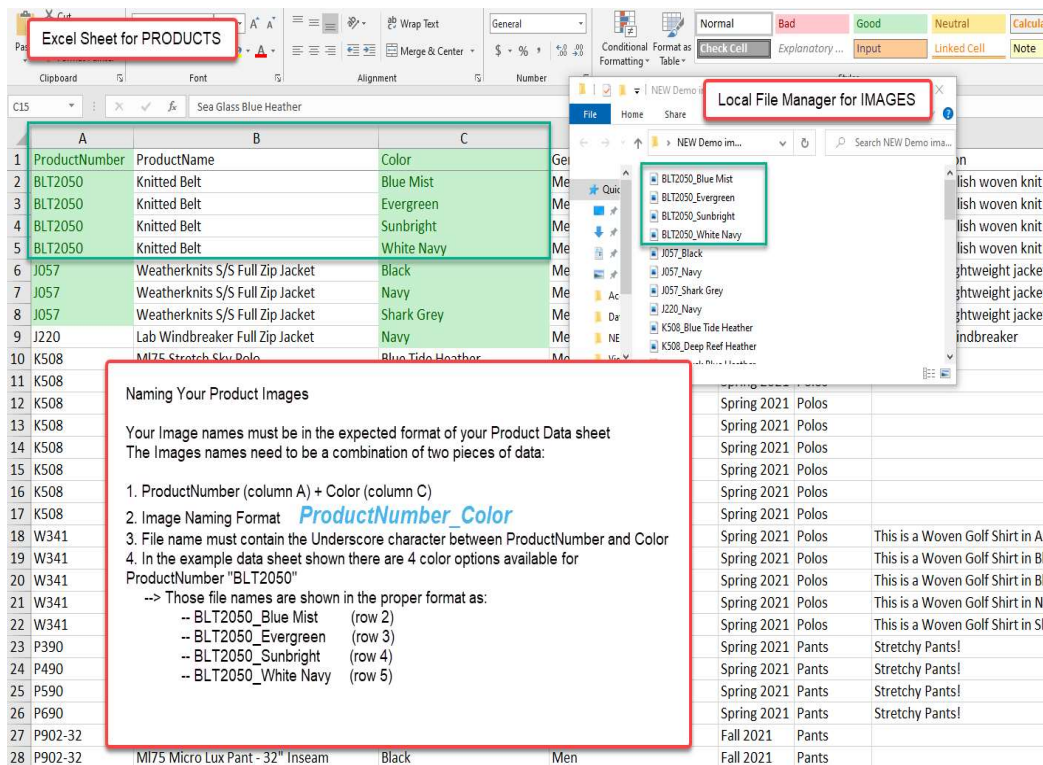
2. Image Dimensions and Quality

    -- We recommend a minimum width of 1200px

    -- Image files should be saved at 300dpi for high quality

    -- Image file size is limited to 10MB max.

    -- HOWEVER… individual product images should be optimized for best website performance. Keep product images under 500kb each when possible.

3.   File Naming Convention

    -- The required file name format is as follows:

    -- *ProductNumber_Color*

    -- This will be the combination of **Column A** and **Column C** from data sheet.

    -- <u>Example</u>: ProductNumber is BLT2050 and Color is Blue Mist

    -- Correct File name: BLT2050_Blue Mist

    -- Continue this process for all image names for the same ProductNumber before moving on to the next Product.

Excel Sheet for PRODUCTS

Local File Manager for IMAGES

	A	B	C	
1	ProductNumber	ProductName	Color	Ge
2	BLT2050	Knitted Belt	Blue Mist	Me
3	BLT2050	Knitted Belt	Evergreen	Me
4	BLT2050	Knitted Belt	Sunbright	Me
5	BLT2050	Knitted Belt	White Navy	Me
6	J057	Weatherknits S/S Full Zip Jacket	Black	Me
7	J057	Weatherknits S/S Full Zip Jacket	Navy	Me
8	J057	Weatherknits S/S Full Zip Jacket	Shark Grey	Me
9	J220	Lab Windbreaker Full Zip Jacket	Navy	Me
10	K508	Ml75 Stretch Sky Polo	Blue Tide Heather	Me

C15 — Sea Glass Blue Heather

File manager images:
- BLT2050_Blue Mist
- BLT2050_Evergreen
- BLT2050_Sunbright
- BLT2050_White Navy
- J057_Black
- J057_Navy
- J057_Shark Grey
- J220_Navy
- K508_Blue Tide Heather
- K508_Deep Reef Heather

Naming Your Product Images

Your Image names must be in the expected format of your Product Data sheet
The Images names need to be a combination of two pieces of data:

1. ProductNumber (column A) + Color (column C)
2. Image Naming Format   *ProductNumber_Color*
3. File name must contain the Underscore character between ProductNumber and Color
4. In the example data sheet shown there are 4 color options available for
ProductNumber "BLT2050"
   --> Those file names are shown in the proper format as:
   -- BLT2050_Blue Mist   (row 2)
   -- BLT2050_Evergreen   (row 3)
   -- BLT2050_Sunbright   (row 4)
   -- BLT2050_White Navy   (row 5)

Additional spreadsheet columns (partial):

	Spring 2021	Polos	
	Spring 2021	Polos	
	Spring 2021	Polos	
	Spring 2021	Polos	
	Spring 2021	Polos	
	Spring 2021	Polos	
	Spring 2021	Polos	This is a Woven Golf Shirt in Aq
	Spring 2021	Polos	This is a Woven Golf Shirt in Bla
	Spring 2021	Polos	This is a Woven Golf Shirt in Blu
	Spring 2021	Polos	This is a Woven Golf Shirt in Na
	Spring 2021	Polos	This is a Woven Golf Shirt in Sha
	Spring 2021	Pants	Stretchy Pants!
	Spring 2021	Pants	Stretchy Pants!
	Spring 2021	Pants	Stretchy Pants!
	Spring 2021	Pants	Stretchy Pants!
	Fall 2021	Pants	
	Fall 2021	Pants	

Adding Multiple Images per Product

Accelerate supports adding alternative images.

-- These can be alternate angles, or lifestyle shots.

-- If you have multiple images for a single style color, just add _1, _2, _3 (underscore 1, 2, 3) or _A, _B, _C to the end of the image name.

-- The images will display in alphabetical or chronological order.

-- Please make sure you have at least one image without an _ at the end.

-- This will serve as the main image throughout.

Example of Alternate image file name format

Here is a full example using the Product data from above:

        -- Main Image: BLT2050_Blue Mist

        -- Alt image 1:   BLT2050_Blue Mist_1

        -- Alt image 2:   BLT2050_Blue Mist_2

        -- Alt image 3:   BLT2050_Blue Mist_3

The Main Image is also called the "Hero Image" for a product

Alt image 1 will be the image that shows when you hover over a product tile

Alt image 2, 3, 4, etc will only be displayed on the Product Detail View

Additional Tip: Keep your Alt image order consistent throughout your site.
For example:

        -- Alt image 1 = Lifestyle Pic

        -- Alt image 2 = Quarter Turn

        -- Alt image 3 = Backside View

Okay, I've got all my images formatted correctly. How do I upload them?

Great! Let's move over to the Image Manager and start dropping images into your site.

1. The Image Manager is located in the Admin Dashboard, click on Add Images.
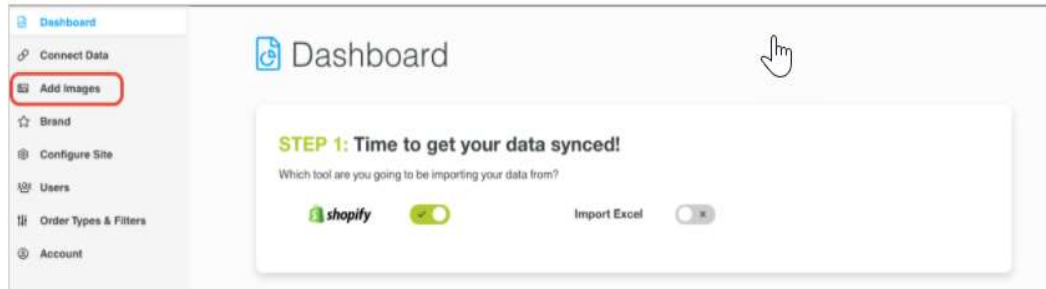
Or, you can get to it using the Admin Dropdown navigation for Image Manager
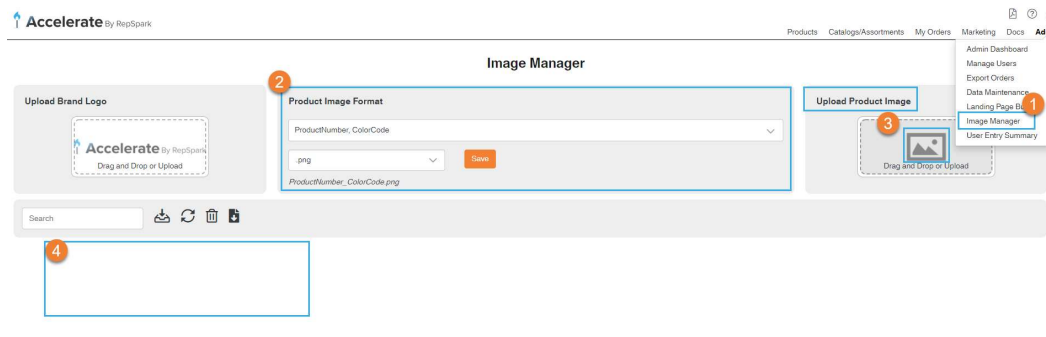
2. Use the Product Image Format section to make sure you have the right options set.

    -- Click the dropdown arrow

    -- Check the boxes for **ProductNumber and ColorCode** only, and press Save

3. Use the Upload Product Image area to begin the upload.

     -- You can drag and drop from your local file manager.

     -- Note: if you do a large batch, it will take longer to upload and the screen will show the Loading/processing image.

     -- Be Patient will your images load. Do not leave this page until the loader goes away. Then upload your next batch.

4. As you upload your photos, they will appear in the Tray below

     -- You can use the tool bar above the image area to Search, Sync, refresh, delete, and download the images after they appear here.

     ** If all of your images are named correctly, and there are corresponding Products loaded in the inventory, those images will automatically be associated and displayed on the front end. **
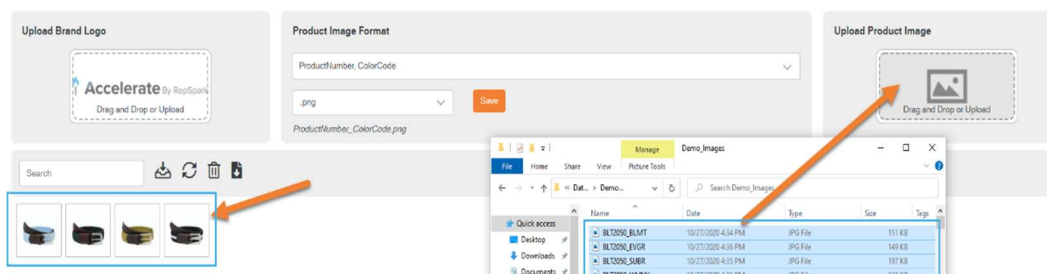
Here is the finished result on the front end. Data + Images = Products!
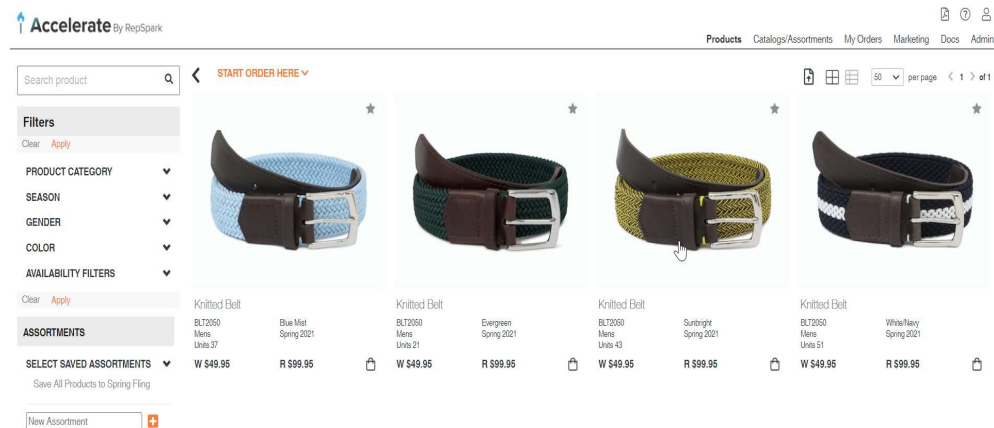
Section 4: Inventory Data Sheet

After successfully uploading Product Data, work on Inventory next

Return to the admin dashboard, then Connect Data section and scroll down to the Inventory area.

> **-- Click "Download Excel Template with existing data"**
>
> **--** This will generate a file with each of the items you uploaded, and a row of data for each size you indicated.

Editing the Inventory Data

1. You ONLY need to edit Column G for the Total Quantity. Everything else will stay as is. By default, quantity is set to zero for newly added items.

2. If you need to add future WIPs, first insert extra blank rows directly below the item you need to add more inventory for. Add the same number of blank rows as there are for sizes (6 rows, in the example screenshot)

3. Then copy all of the product data (6 rows), and paste into the blank rows below.

4. Update the Available Date, and set the quantities
5. Repeat these steps for all products, and sizes.

The Inventory Sheet will contain all of the existing product data in it.

COLUMN G is the only column where you need to make data changes

By Default, all of the values in Column G will be set to 0 for Total Quantity.

The Available date will also match today's date. In my example file, I already had some previous inventory loaded, and some future dates loaded.

To create future WIPs, you will need to insert some new blank rows below the product, and then copy and paste the entire size run (6 rows) and then set the date in the future

Save your sheet when completed, and then upload

Upload your Completed Inventory Sheet

Drag and Drop the Inventory data sheet into the upload area just like you did for the products section.

If there's an error it will tell you what it is, or you'll see a success message in the upper right-hand corner.

-- View your updated inventory data by returning to the Products section

-- Switch to List view, or click on an individual item.

Section 5: Customer Data Sheet

After completing Product Data and Inventory it's time to complete the final data sheet for Customer Data.

Download the blank Customer Excel sheet from the Admin Dashboard.
Here is an example with two rows of customer data filled in.

Tips for Adding Customer Data:

1. Fill out the sheet as fully as possible with for each customer record.
   -- This data will be used on the order header, so completeness and accuracy are essential here.
   -- When adding NEW accounts, you must add them to the existing sheet as new rows of data and re-upload the entire data set.

2. CustomerCode
   -- Values need to be unique (no duplicates).
   -- These codes will be used to Assign an account to a Sales Rep
   -- These codes will be searchable when creating new orders

3. Name
   -- This is the Business Name and will appear on the Order Header

4. StoreCode
   -- not required, but you can use a default value if you want.

5. Address fields
   -- Self-explanatory
   -- Fill out as much as possible.
   -- Address2 and FaxNumber are optional
   -- This information appears on the Order Header as the standard / default

shipping address

6. SalesPersonCode
-- This field is VERY IMPORTANT as it is the only way to like a customer account record with a Sales Rep's profile
-- These codes should be unique (no duplicates)
-- If this field is left blank, then this customer account will be automatically tied to code "0000" for "In-House" and can be sold to by any RepSpark sales user
-- SalesPerson Codes are stored in RepSpark and will be used in the Manage Users area when creating Sales Rep user Accounts
-- More info on setting up Sales Rep user Accounts can be found in the helpdesk tutorial documents.

7. SalesPersonName
-- This field is the label name that accompanies each code.
-- This is the name that will be displayed on the Order Header

8. ShippingMethod
-- FedEx, USPS, UPS, etc

9. Terms
-- Payment terms, such as Net30
-- Each customer may have different terms

10. DiscountPercentage
-- typically should be set to 0 for all accounts by default

Upload your Completed Customer Sheet in the Admin Dashboard

Same as with the other sheets, drag and drop it into the proper area and you'll receive a success or failure notification. If it fails, refer to the error code and edit your sheet.

Once customer records are in RepSpark, they will be searchable during an order.

Company My Tradeshow Company	Sales Person ⌄	Customer ⌄						
Search for a customer						ALL # A B C D E F G H I J K L M N O P Q R S T U V W X Y Z		
Name	Code	#	Rep	DBA	Address	Phone/Fax	Terms	Via
Alpha Company	ABC	100	BOB		**Alpha Company** 1600 Main St Irvine, CA 92612 USA	555-555-1234	Net 30	FEDEX
Enigma Company	EFG	2	ANN		**Enigma Company** 250 South St Costa Mesa, CA 92080 USA	555-555-1235	Net 30	UPS

Note: If you are logged in as a SALES REP, you will only be able to see the customers associated with your SalesPersonCode. Admin users can search all customers

Congrats!! You've reached the end of the Excel Data process. Now we can move on to fun stuff, like Assortments, Catalogs, and Branded Landing Pages!