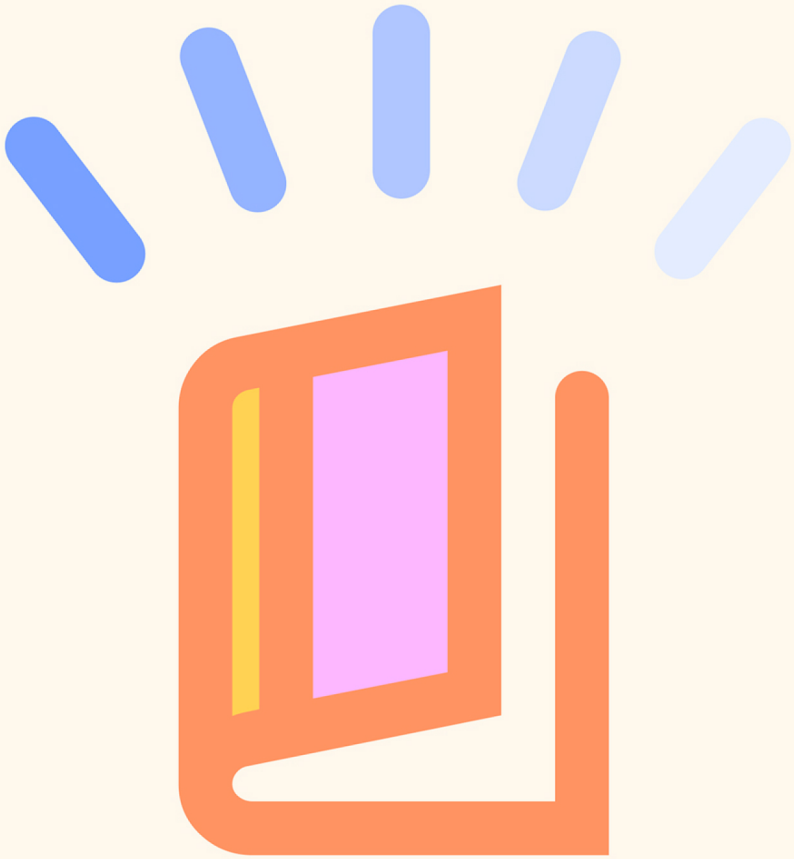
EBOOK



# Automate catalogs with PIM

HOW TO SAVE TIME IN
INDESIGN FOR ECOMMERCE

Sales Layer

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# 1. Do you need to improve your catalog design? YES!

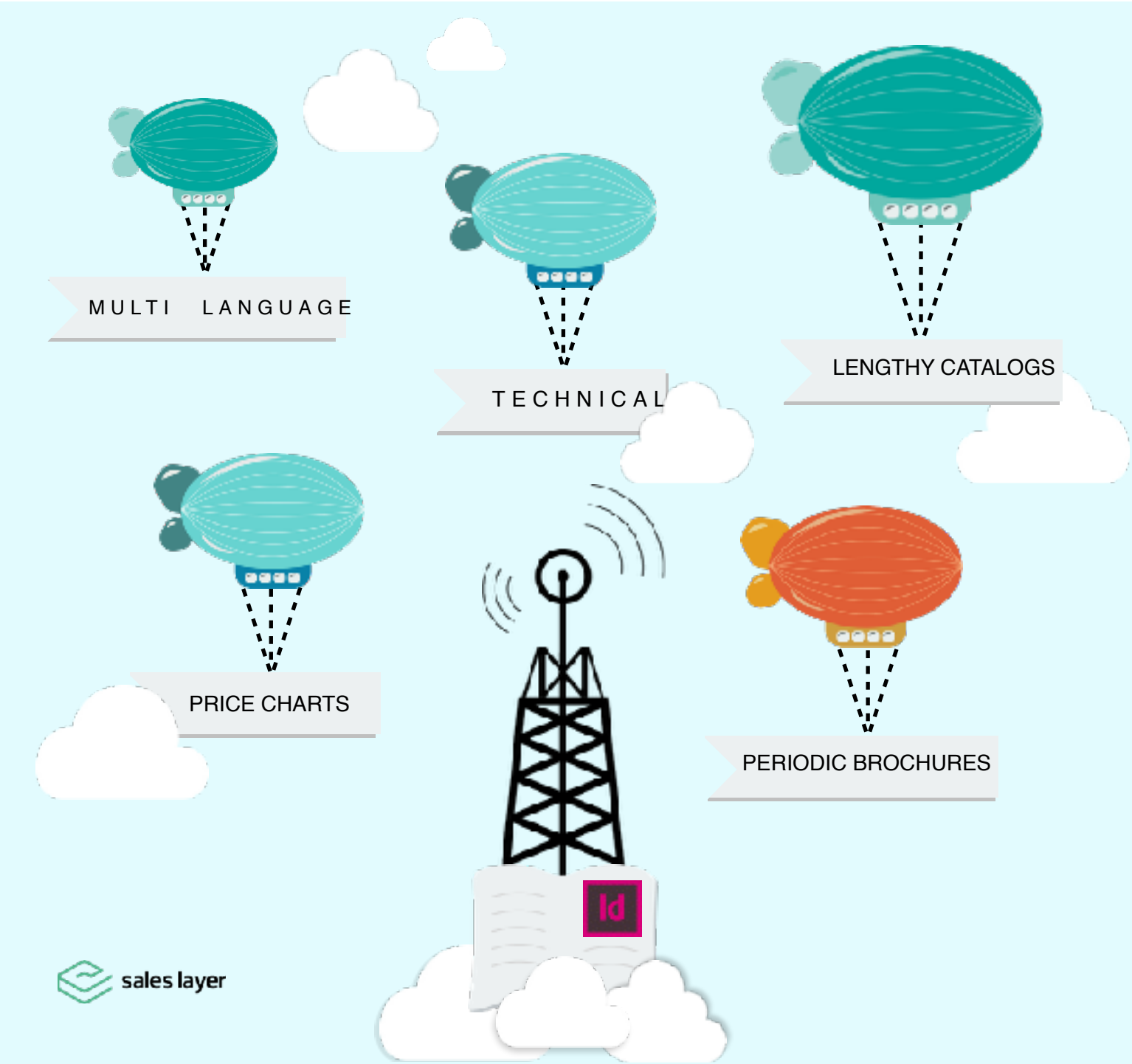
Every year you need something extra to take on the task of creating your company's new catalog. And no, we don't mean some stomach protector, but tools that make this work much faster, easier and more efficient.

It may seems that creating the perfect catalog for your company –one that adapts to all platforms: paper, web and others– is the sole responsibility of the design department, and its trusty old friend, InDesign. But it is not enough to leave everything to the designers...

*Catalog design could be much more efficient if you add some software that makes wonders… and eases your stomach pain.*

## 2. When should you automate catalogs?

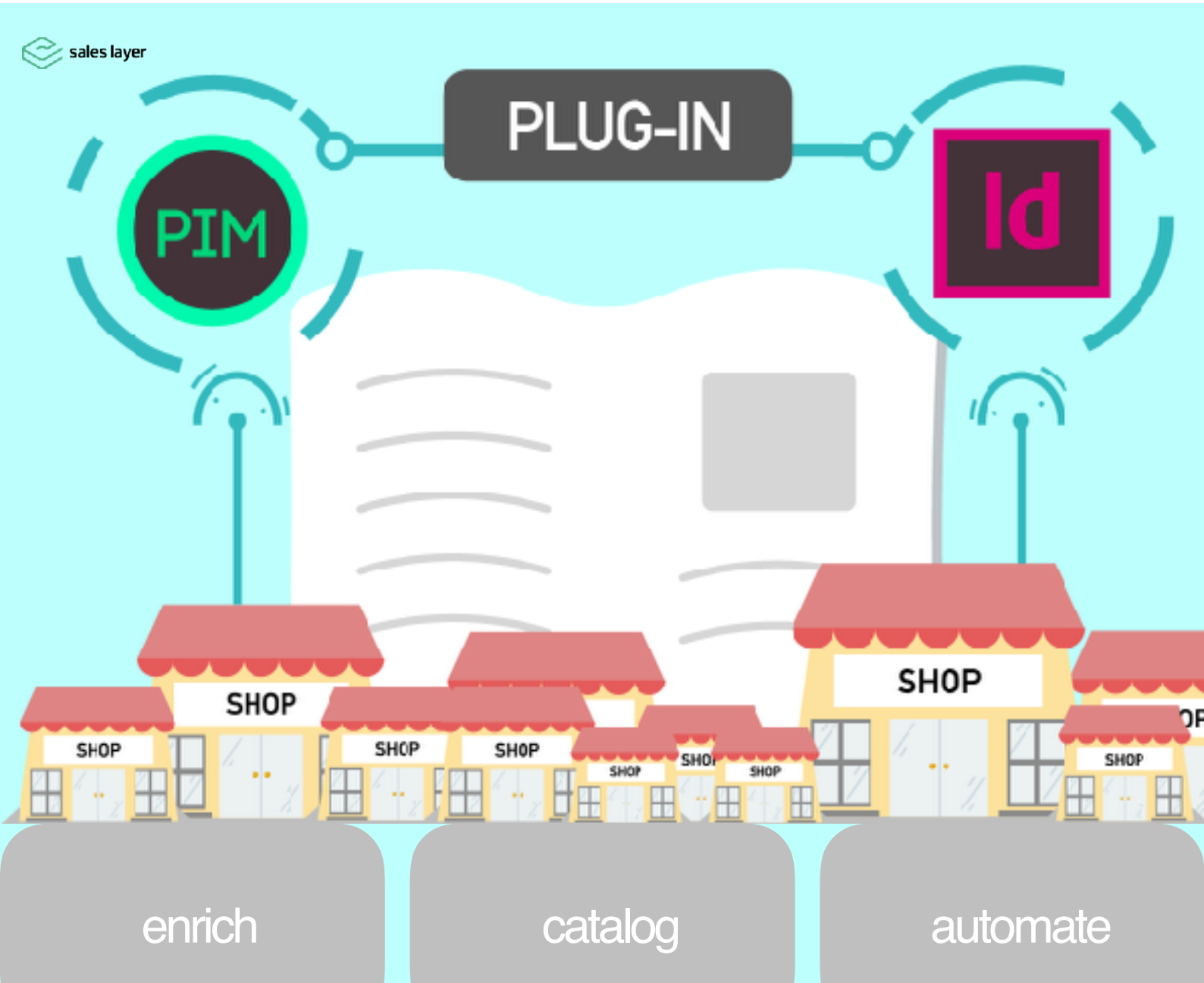
Catalog automatization is essential when your company has a high volume of work and information, where many people are involved and the risk of exposure to errors is greater. Catalogs with a significant number of references and a large amount of product information can only be edited efficiently using a plug-in that automates the sending of your product data to InDesign. For example, it is essential for your company if one or more of the above-mentioned cases describe your situation:



## 3. What do you need to automate your catalog?

Think that there are endless obstacles between the catalog and you: dozens of information sources, participants and collaborators, software extensions, unforeseen events and updates.

To navigate such an information heavy situation in a manner that is as risk-free as possible, you need two tools that will allow you to create a catalog designed in InDesign without one single error. These two tools are a PIM - to manage all the information - and a plug-in that connects to the PIM and automates the creation of the catalog with InDesign.



# What is a PIM?

A PIM is the software tool that manages all your product information (Product Information Management), such as our PIM, Sales Layer. A PIM allows you to store data, images and files in the cloud, where all your company's sources of product information –ERP, spreadsheets, databases, text documents or XML files– are synchronized in order to harmonize, enrich and distribute the information in all of the necessary channels, including the paper catalog or the PDF technical sheets.

However, a PIM does not have the tools to design your catalog. The design department should be responsible for this task together with the ever trusty InDesign.

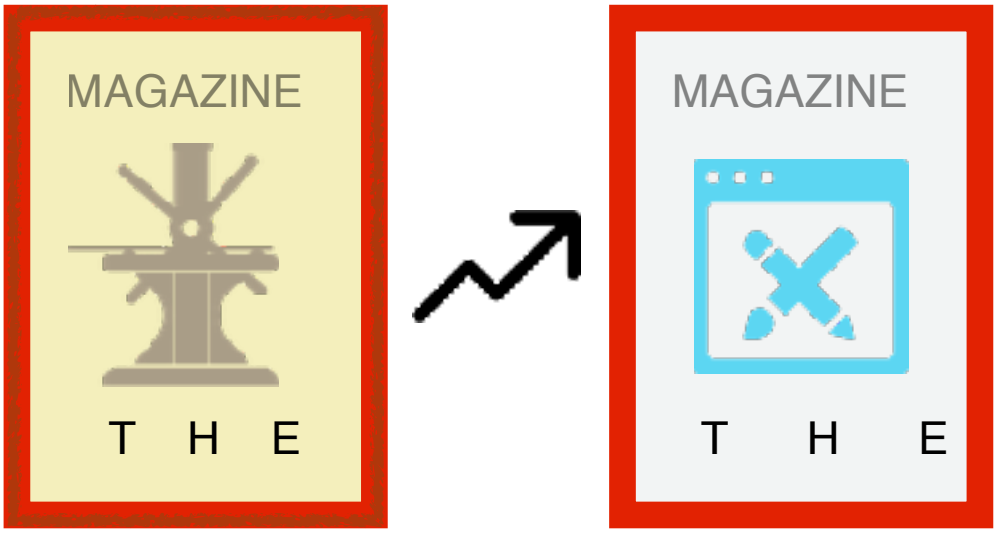
Therefore, you will need a tool that allows InDesign to connect to the PIM and automate the catalog creation, almost as if by magic.

The name of that tool is **EasyCatalog**

Much like Gutenberg's printing press is a thing of the past, businesses can no longer waste time reviewing the design of their catalogs page by page. Automating this process is not just a modern luxury, but a vital component in the day to day running of your company, specially if you must design numerous catalogs at the same time, involving hundreds of pages through several channels.

The way to ensure data from each product sheet is reproduced perfectly in the catalogs designed with InDesign is by using the EasyCatalog plug-in, which downloads and links the data stored in the PIM with the document and automates the page layout.

This extension flawlessly inserts all product information: technical specifications, descriptions, prices, graphic content and design templates. It works for online and paper catalogs, mobile apps, flyers, technical sheets, brochures, directories, ePubs, interactive PDFs and any document where you are going to showcase your products.



EasyCatalog is developed by the British company 65Bit and distributed in Spain and Latin America by Nousmedis as an official extension for Adobe InDesign, and is trusted by reputable brands such as Sotheby's, Black & Decker and Montblanc.

EasyCatalog allows you to create your catalogs in three different ways, depending on your working style and the final design of the catalog:

Fully automated

Semi-automatic (Requires user intervention)

Manual (For cases that require precise control of the position and design of each element.)

EasyCatalog is very easy to use. You must design one or more basic information models, by grouping different graphic elements, such as a text frame, one or several images, icons etc. The program will replicate them instantly with the PIM data, without you having to worry about repeating the same model page by page.

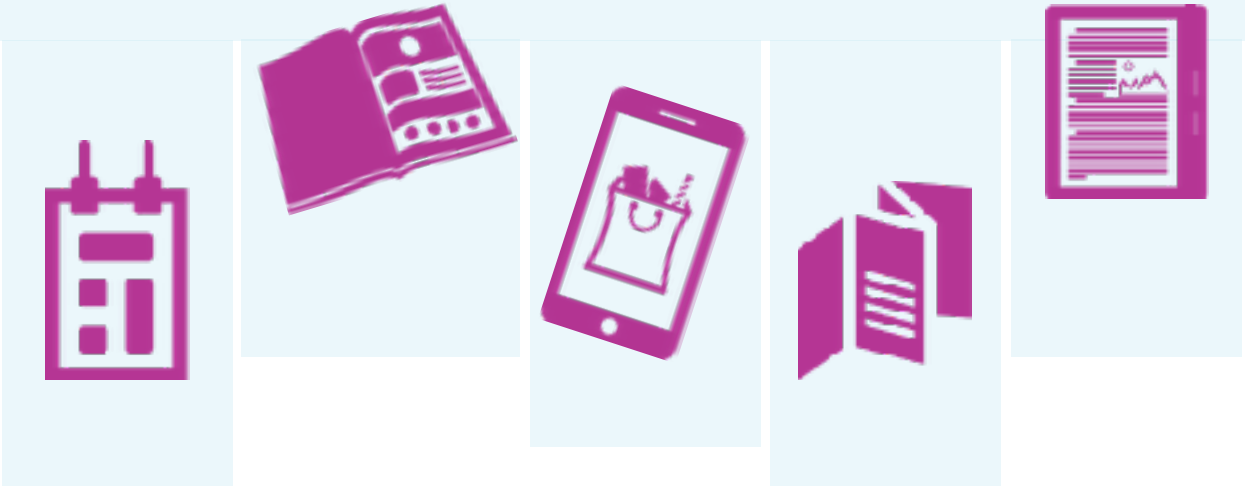
Once the catalog is ready, you only have to press one button to create it in another language.

Thanks to EasyCatalog, any corrections made on your website will automatically appear in your catalogs. Likewise, any changes that you make in the InDesign catalog also appear on your website, saving minutes of work per reference, multiplied by thousands of references, resulting in thousands of hours that you can dedicate to other tasks.

This way of working is known as bidirectional and consists of exchanging information between EasyCatalog and the PIM system. It is completely optional and can be modified at any time.

# 4. Benefits of catalog automation

- Create large amounts of pages in no time at all (with savings of up to 80% of the hours you would spend using a traditional layout)
- Ensure accuracy and consistency between the catalog data and where the information comes from
- Include last minute changes, such as new prices, without incurring delays
- Create versions in different languages in record time
- Have a 0% error rate
- Launch catalogs to the public more quickly
- Reduce maintenance costs



*The most important thing: for the first time the designer's work is appreciated and he can focus on creative tasks and avoid wasting hours on tedious copying and pasting*

## 5. PIM & EasyCatalog integration steps

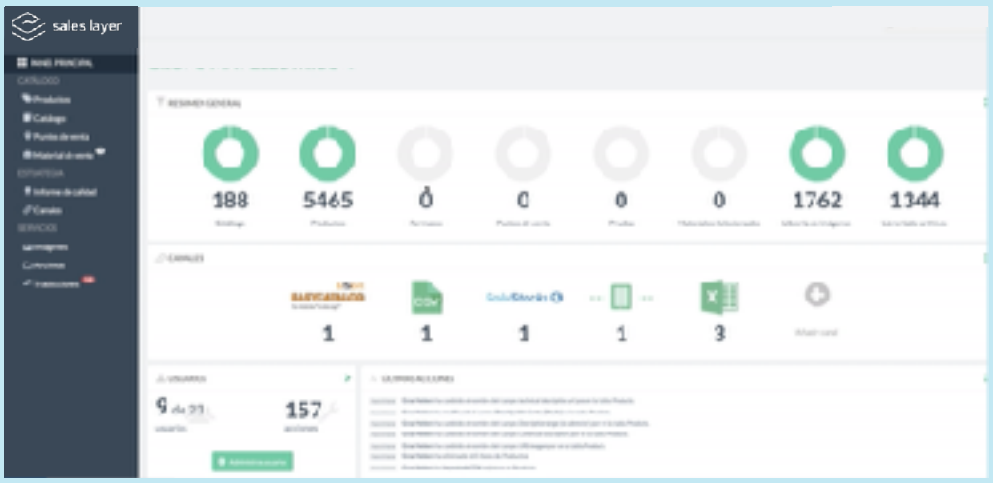
Do you have a phobia of files and manuals that have endless steps? Relax, you only need to know the 8 basic steps to successfully synchronise the EasyCatalog plug-in with your PIM system:

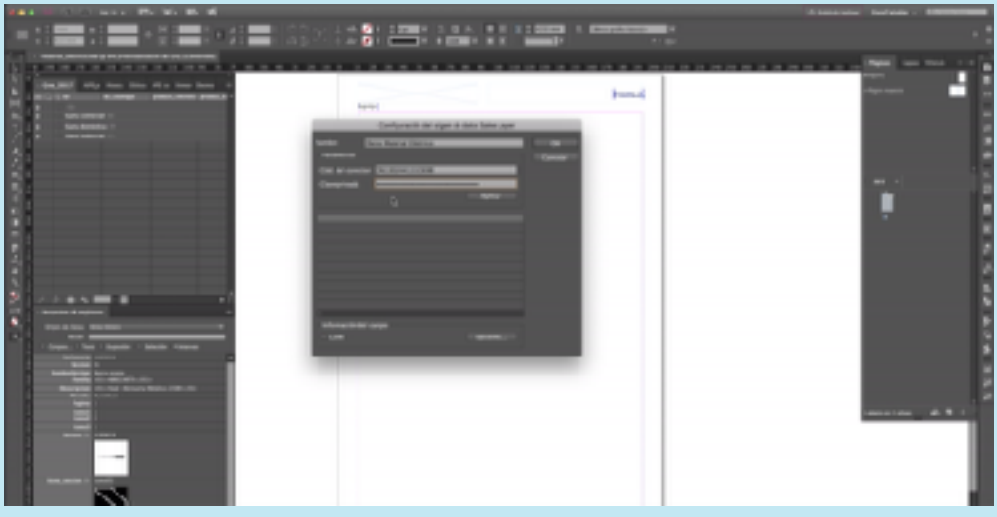
| | |
|---|---|
| 1 | Import all your data to the PIM system |
| 2 | Create the PIM system conector |
| 3 | Select the fields you want to export to your catalog |
| 4 | Create a new data origin in InDesign |
| 5 | Add the conector password and the private code |
| 6 | Synchronize all data on the document |
| 7 | Create your catalog in an automated way |
| 8 | Update your catalog with the new data |
| | |

# 1 3 main elements

1. All your data stored in the PIM system (such as Sales Layer).
2. An InDesign document with the styles and master pages of your design.
3. One or several models that define the aspect with which the data is placed on the pages of the document during the layout process.

*Changing data in any of these three elements allows endless combinations*



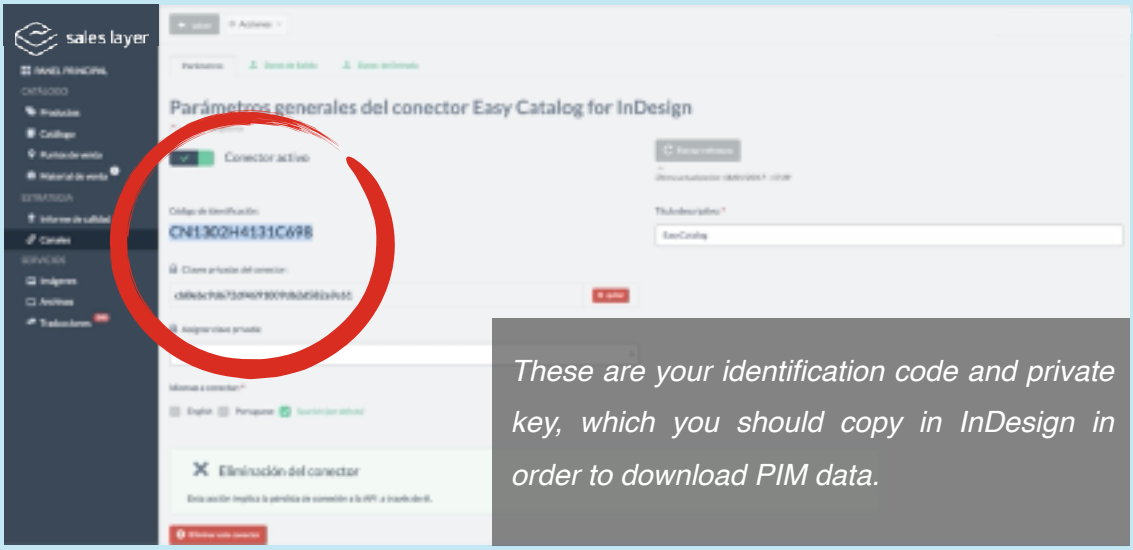



# 2 how to send data to indesign

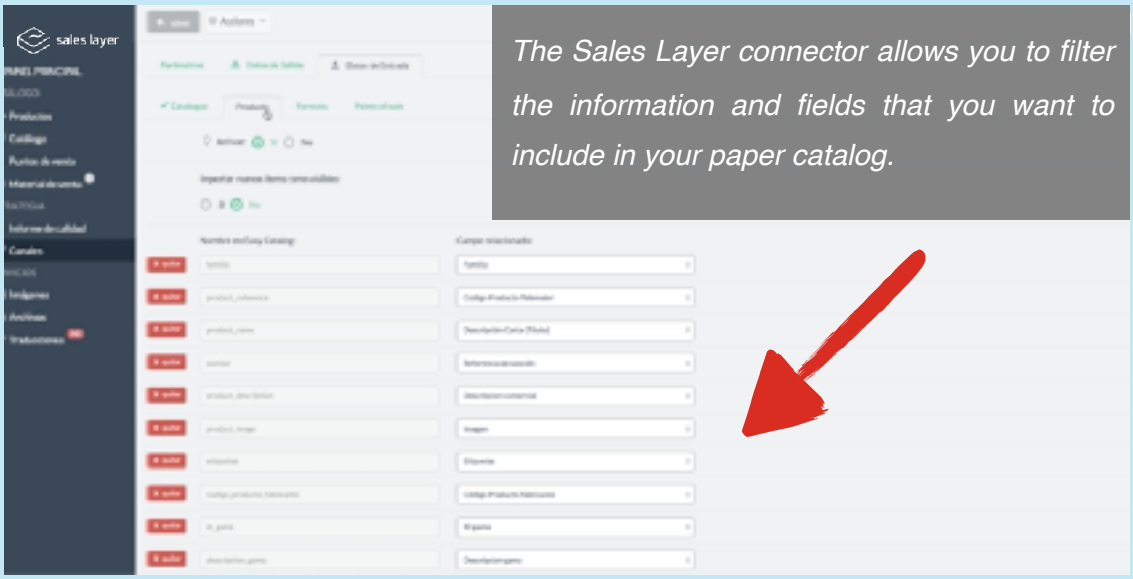
*Your PIM system structure will be replicated in InDesign*

The data that you have in the PIM system will be used by EasyCatalog for automatically design the catalog's pages. The way the data is organized will determine the order in which it will be placed in the document.

You can design your catalogs with complete freedom. To drop your data in InDesign, you must create a connector in Sales Layer, as shown below:




*These are your identification code and private key, which you should copy in InDesign in order to download PIM data.*




*The Sales Layer connector allows you to filter the information and fields that you want to include in your paper catalog.*

# 3 how to handle changes

Changes in your PIM system are applied automatically in InDesign.

Before sending the files to be printed, the synchronization process lets you see marked in red the elements of the final catalog that don't match the PIM data source. Just select the Update option and the changes will be incorporated to your catalog, so it will always contain the most up to date product information.

The process also works in reverse: the changes made in InDesign can be approved and added to the information sheets that your PIM system manages.

Remember that when designing the catalog with EasyCatalog, the link with your data is bidirectional: any change made in the PIM system can be approved and reflected in the InDesign catalog, and vice versa. You can also temporarily block changes made to the PIM system from appearing in the InDesign catalog, depending on your needs.

**OSO AMOROSO**
Oso de peluche para niños
a partir de **0 meses.**
**Precio de venta: 25 €**

**OSO AMOROSO**
Oso de peluche para niños
a partir de 2 años.
**Precio de venta: 45 €**

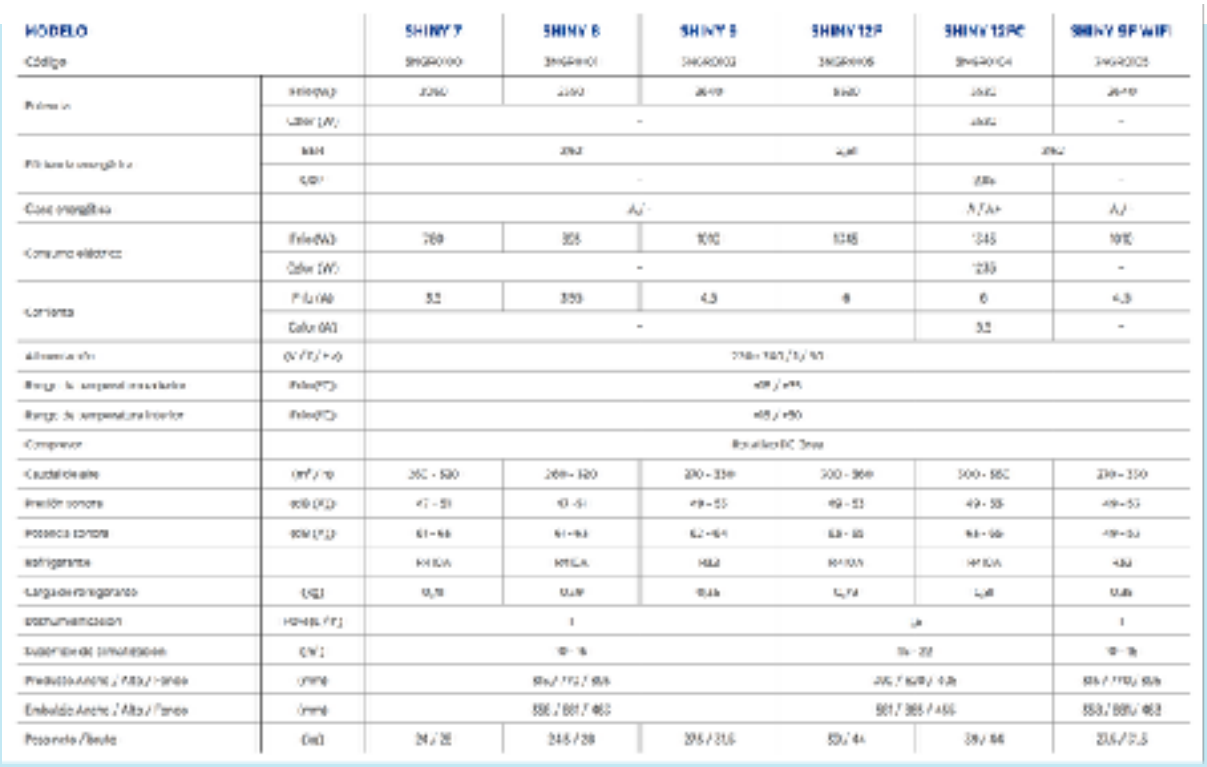
# 4 advanced options

This same process is applied to the design of tables and entire pages. You can replicate any catalog you have in mind, no matter how complicated or big it may be.

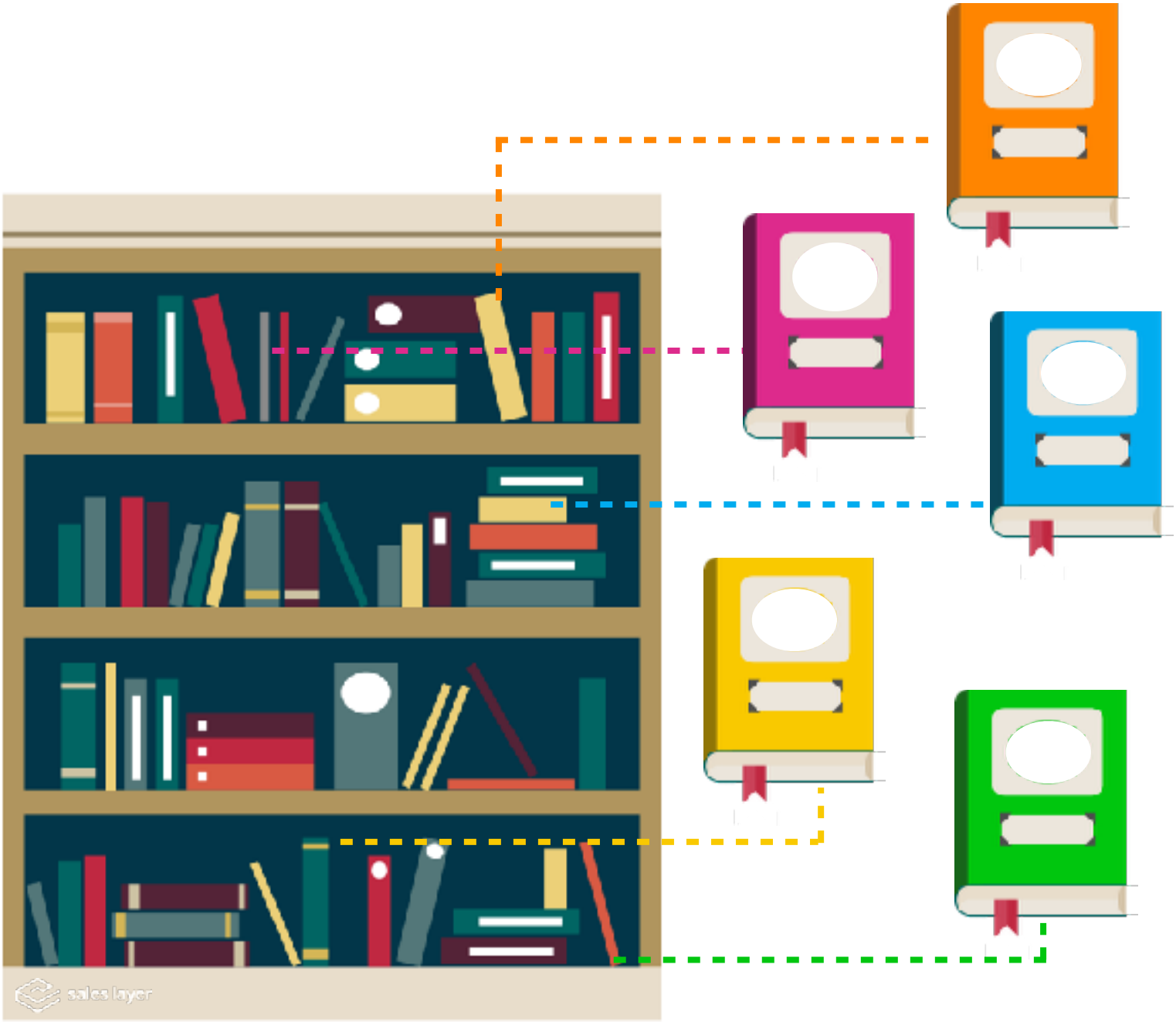
EasyCatalog allows you to automatically create tables in a matter of seconds, compared to the traditional process that would mean hours of work and many errors as a result of manual copying and pasting.

Catalogs whose design previously required hundreds of hours of manual work can now be created in just a few days, with no errors and no revisions necessary.

You can now merge rows and columns automatically when the content is identical. Apply different styles for row and column headers. Insert columns with additional information, such as units of measure.

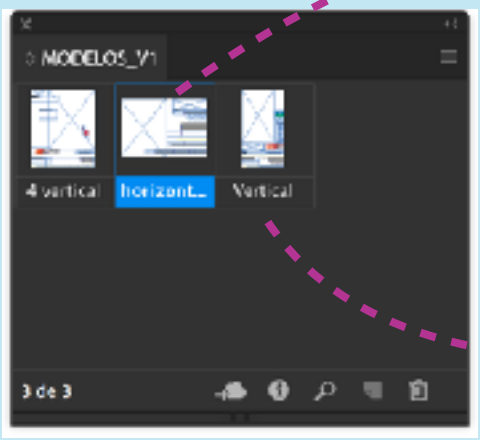


# 7. EXAMPLES OF EASILY AUTOMATED PAGES



# 1. electrical appliances catalog

A household appliances catalog is characterized by the huge variety of content relating to different products, like shape, size and other technical specifications and characteristics. In these cases, EasyCatalog will help by automatically filling in all the information of each of the modules that make up the page: product images, description, name, reference, price, etc. And given that the designer has a whole library of models created for the catalog, you can apply each of the variants to find the one that best fits the page, without worrying about the veracity of the information: it will be correct 100% of the time.



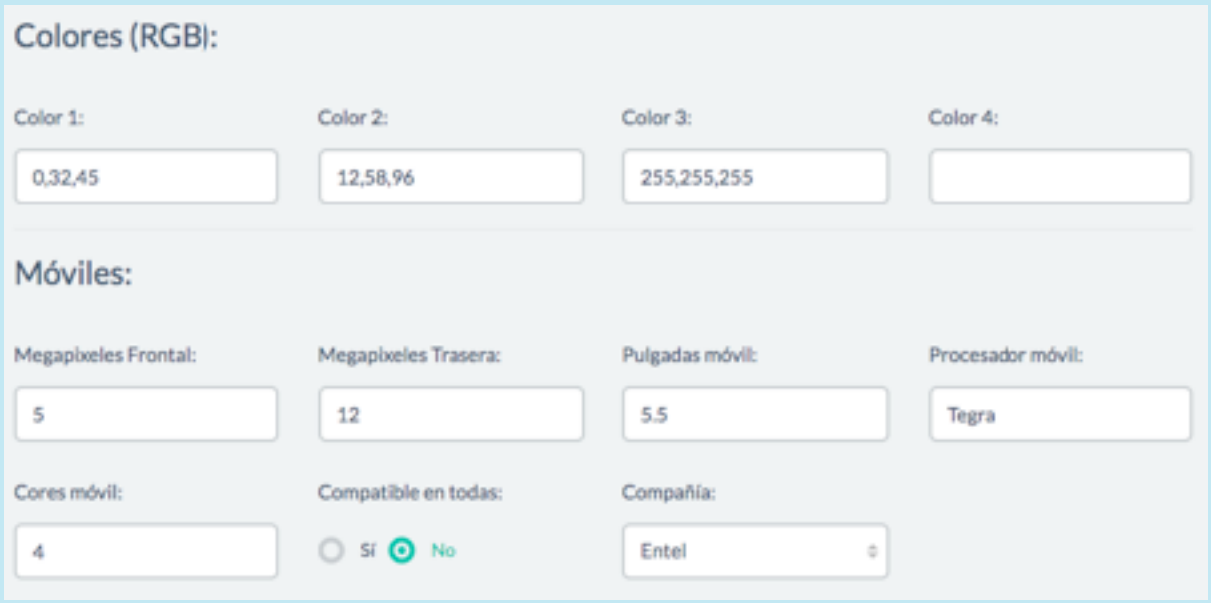

Models library

# steps

## 1 Create the necessary fields in Sales Layer

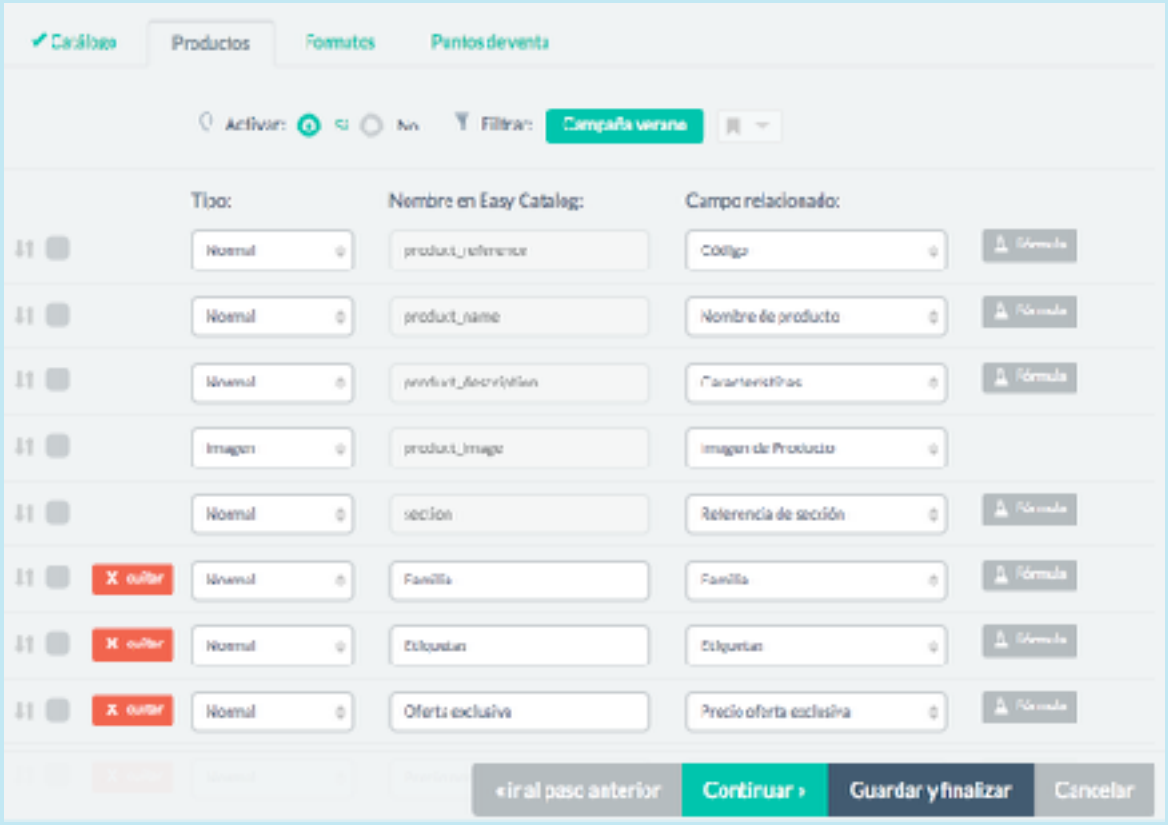
The first thing we must do is determine the number and type of fields that we need to create in Sales Layer, so we can enter all our product details, such as name, description, images and brand. Sales Layer offers us the possibility of creating different types of fields:

- Multiple response fields, ideal for specifying the types of features that a product provides so it can later become an icon.
- Drop-down lists, to select a single value from multiple options.
- Image fields, to store photos of our products. The most common formats in commercial printing are supported: PSD, TIF and JPEG, among others.
- File fields, to save the icons in Illustrator, PDF or EPS format.



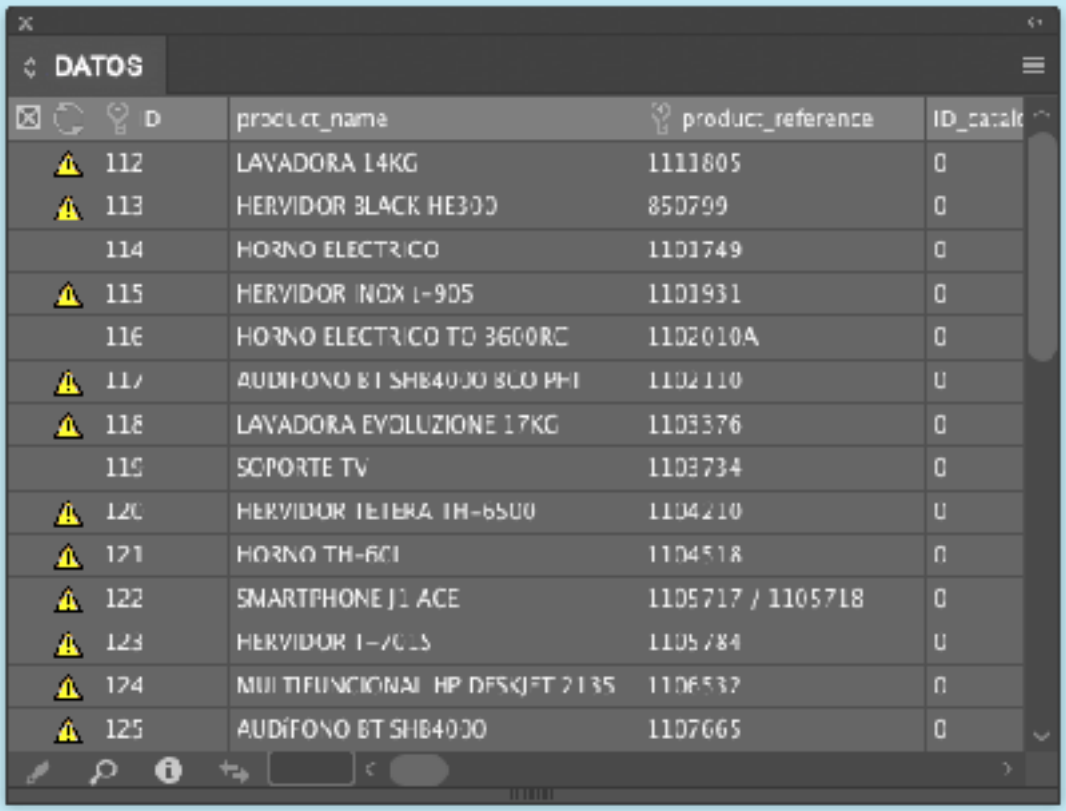
## 2 Create an EasyCatalog channel in Sales Layer

An output connector or channel will allow all data stored in Sales Layer to be synchronized with the EasyCatalog data panel. It is necessary to specify in the channel the fields that are to be exported, as well as to apply formulas that allow, for example, changing units of measure from one metric system to another.



## 3 Import data in InDesign using the EasyCatalog panel

We will now have to create a Sales Layer data panel in EasyCatalog. Simply specify the configuration provided by the Sales Layer channel in the Parameters window: an identification code and a private key of the connector.



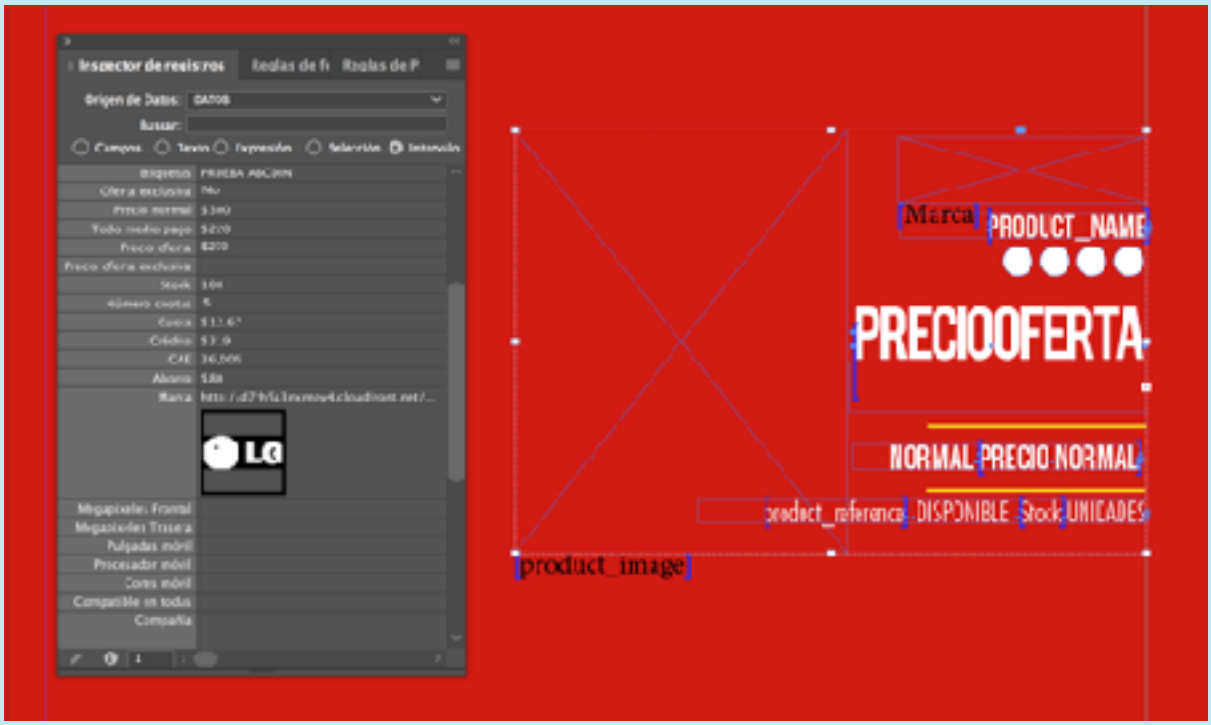
# 4 Create different product models with the InDesign & EasyCatalog tools

A product model is simply the combination of various text and image frames that are linked to Sales Layer data. All these elements are grouped and dragged to a library panel to be used during the creation of the final document.

# 5 Link Sales Layer data to InDesign elements

When we have our design model ready, we must insert the Sales Layer field markers in InDesign. In this way, when you need to create a new product in the document, InDesign will dynamically download all the product information in the document. In doing so, a permanent link will be created between the field and the document, so when the value of the field changes, it will be reflected in the InDesign document.

Use the EasyCatalog panel Record Inspector to insert the fields in the document.



## 6 Create the final document

Now you just need to select a record (product) in the EasyCatalog data panel and drag the library element you want to use to the document. Combine different models to create more dynamic pages. EasyCatalog will replace the placeholders that you created in the previous step with the actual data of each product.

Librería de modelos

## 7 Update the data

Every time some data in Sales Layer changes (new prices, new features, corrected descriptions, etc.), you only need to synchronize the document with the data. As if by magic, the document will have updated data, maintaining the design and layout of the products.

# **2.** product pages in several languages

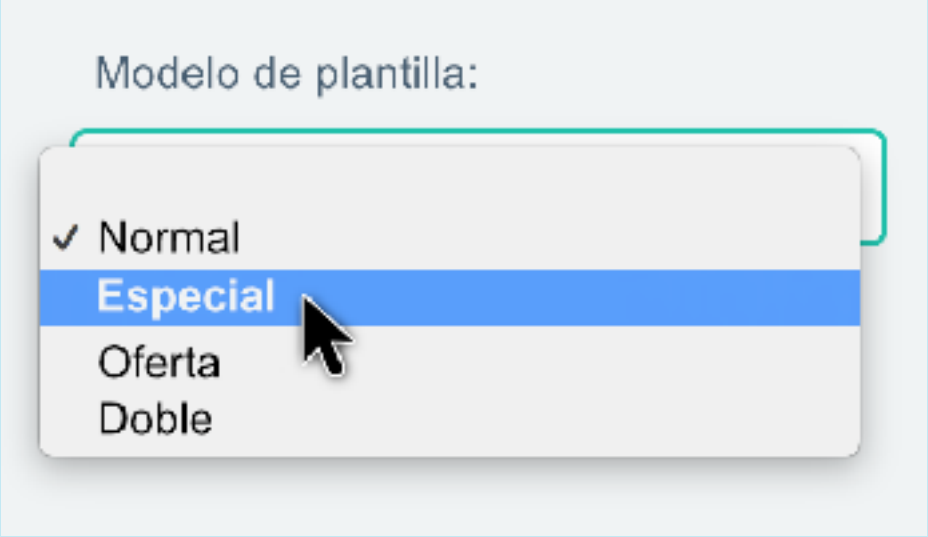
Can you imagine having to create 5,000 product entries by hand, in 5 languages? How much time and resources would it take? You would probably need a large team of designers working for a few months to create such a large number of documents. However, with EasyCatalog and a computer, it takes less than a week to create 25,000 files. The technical tables can automatically merge rows and columns when the content is identical, the icons corresponding to the different product details are assembled automatically, and the final document can be exported directly in PDF, or as an open InDesign to make later editions.

For a project like this, you will need to create an InDesign template that will consist of one or more master pages with different placeholders: tables, graphs, icons and text. EasyCatalog will create a document for each reference (or group of references), with as many pages as necessary to accommodate all the information, placing the data stored in the corresponding bookmarks in the PIM.

## steps

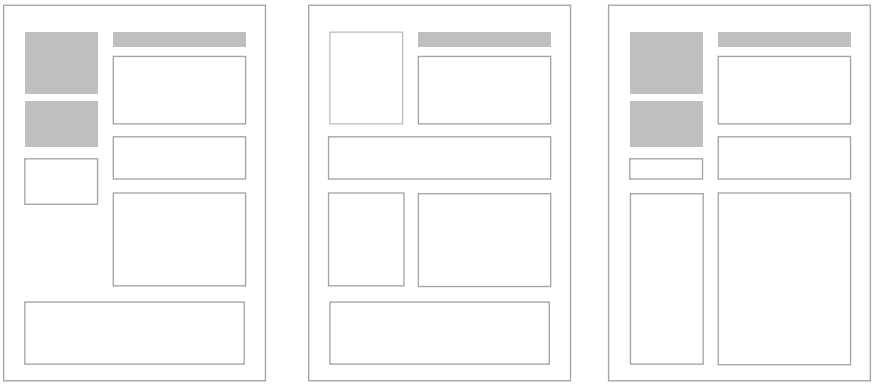
1 Create the necessary fields in Sales Layer, create an EasyCatalog channel and import data in InDesign

Follow the same steps as in the previous case, but this time create a new field in Sales Layer, in the Data Type List, so that the user can choose a template model. In this way, during paging, EasyCatalog can use one or another template, depending on what the user decides.



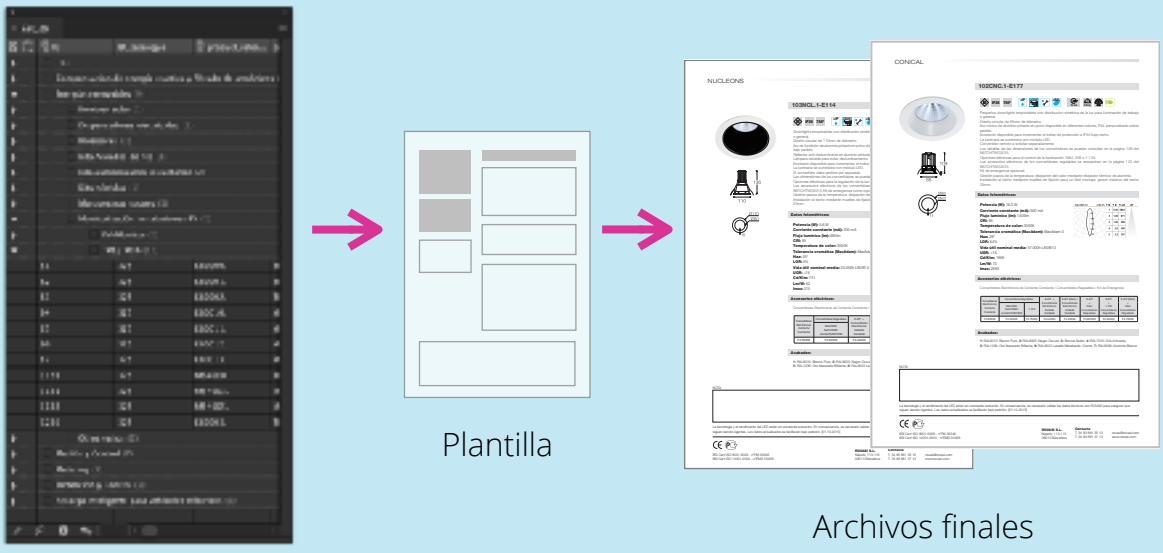
## 2 Create one or more templates in InDesign

To create a template, simply put the elements you want EasyCatalog to fill automatically during the composition of the document in a page in the document: images, text frames, logos, master elements and link the Sales Layer fields in different parts of the document using the Records Inspector panel. When you have finished, save the InDesign document as a template.



## 3 Paginate the records

Select one or more records in the Data panel in EasyCatalog and choose the Paginate option. EasyCatalog will create as many independent documents as records in the data source, using the template you have selected in Sales Layer.



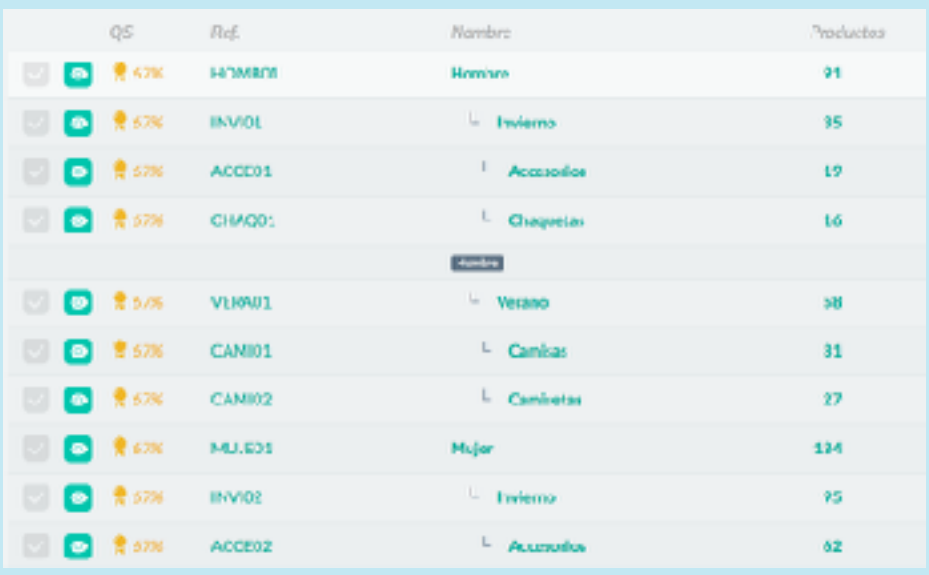
# 3. PRICES WITH THOUSANDS OF

Many companies need to publish complex price lists containing thousands of technical references on a regular basis. Each reference can consist of a variable set of icons, several technical formulas and a price list. You can also have products that should stand out from others, and change the way they are presented according to the proportions of the image. All this is simple with EasyCatalog. You can indicate the importance of a product in the PIM and define several models in InDesign, which will then be used by EasyCatalog to make a final document in a matter of hours.

## STEPS

1 Create the necessary fields in Sales Layer and the catalog structure

Sales Layer allows you to group products according to different category levels. These levels will later be used by EasyCatalog to place the different model types that indicate to the reader when we are moving from one category to another. For example, in a fashion catalog, you can create the categories Men and Women, which in turn will have different subcategories. When the document is automatically paged, EasyCatalog will place a module with the category title, which can consist of a white text on a colored background. The background color may be different for each category.

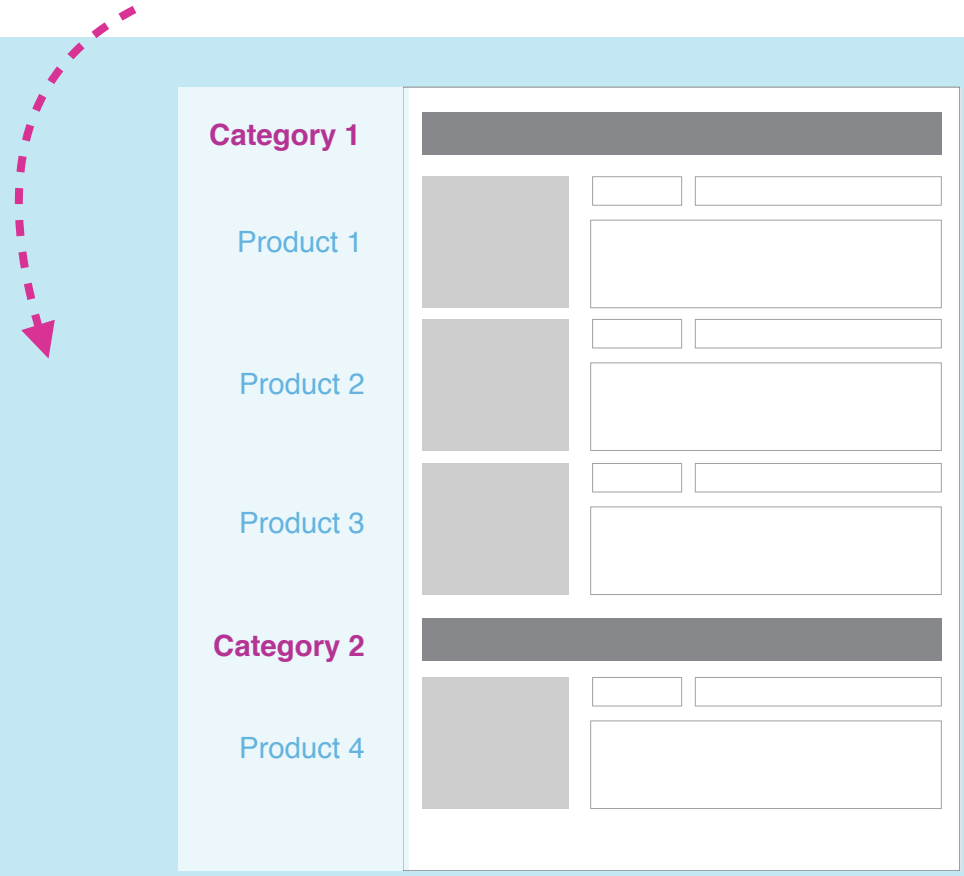


## 2 Create an EasyCatalog channel and import data in InDesign

Follow the same procedure as in the previous cases and, optionally, add a List of options field to specify if a product should appear in a certain way in the document, like, for example, when it is a special offer.

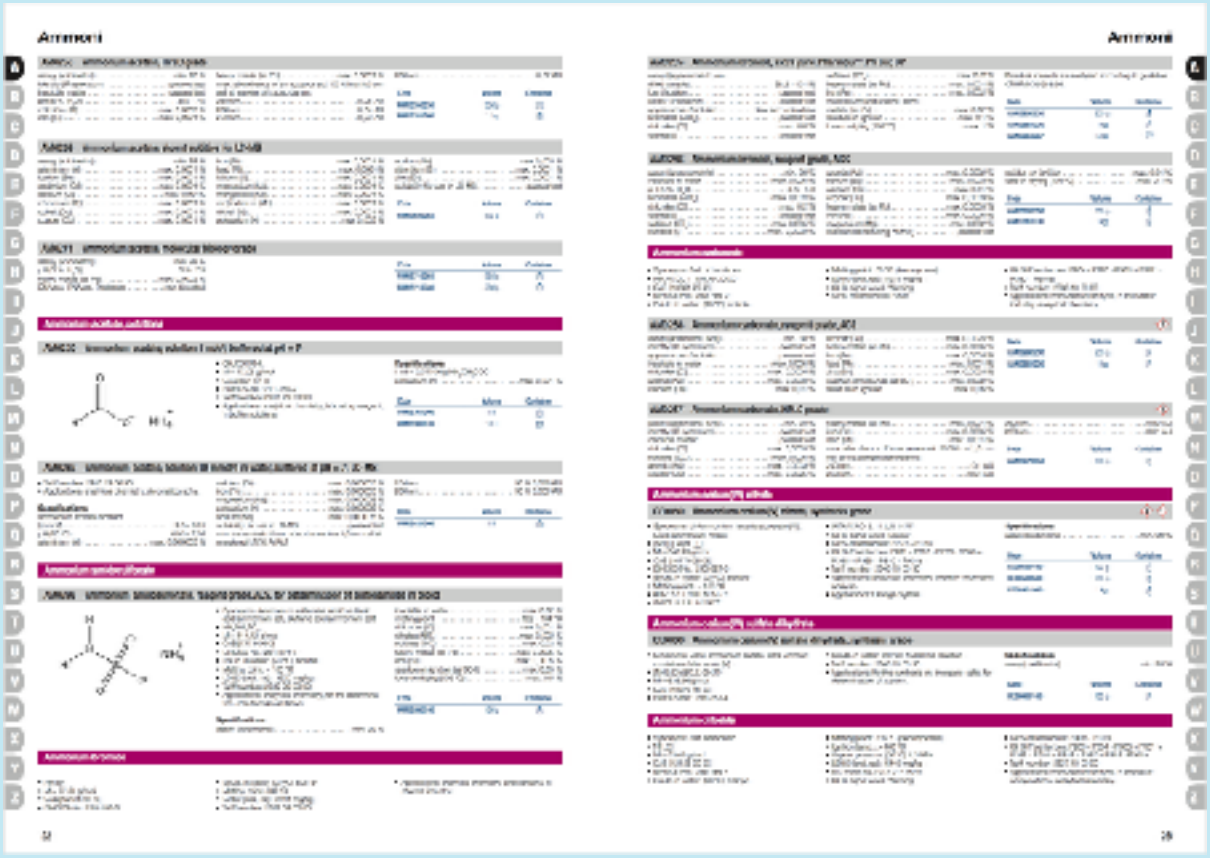
## 3 Create different product modules with InDesign, one for each category or group

In order to facilitate searching in a wide price rate range, use different modules for each level or category. This is so the reader will know what section he is in and when he is moving from one product category to another.



# 4 Create one or more master pages with a reference text frame in InDesign

In this type of paging, the different modules will be inserted as anchored elements in the main text flow. EasyCatalog will insert the corresponding module for each level that was created in the Sales Layer catalog. You can decide if each time you change the main category you should start a new page, or if it will be placed after the last product.



*In this price list, a purple color module has been used to mark the change of product family and a grey color module to indicate each of the products. Each product consists of an image (optional), various technical data, and a reference table that includes a different icon for each type of presentation.*

Sales
Layer