EVERYTHING YOU SHOULD
& SHOULDN'T DO WHEN

Onboarding a PIM Solution

Sales Layer

Get an improved product experience for your company and customers

A PIM system instantly improves how all product catalog resources are managed in any company and it adapts to all industry verticals. With PIM technology, you'll get a centralized, automated platform for all your product information.

At Sales Layer, we offer a PIM solution that uses cloud-based SaaS, making initial implementation and daily handling of the PIM solution much easier and more accessible from anywhere.

To make your onboarding as simple as possible, and to make sure it goes off without a hitch, we'd like to give you a series of basic recommendations so that you are all set from the get-go.

LET'S GET DOWN TO IT!

# Checklist to be ready before onboarding resources in a PIM solution

☑ **Choose a PIM Manager or Project Manager.** He/she will be your 'PIM wizard:' the project manager is someone who is familiar with the project's goals, how the tool works, and is the person who defines processes. This is the person on your team in charge of monitoring everything related with the PIM system and gathering any questions that may arise during its use.

☐ **Get a specialized technician for implementation.** It is not required but it is advisable to have someone with an overall project view and, if possible, experience with our tool. A specialized partner saves a lot of time and headaches. We can suggest the right person for your project.

☐ **Educate your team.** It is important for everyone who is going to work with the PIM solution to know exactly what this software is and what its features and advantages are. When your onboarding starts, at Sales Layer we will give you personalized training with a first round of videos and a session for questions once you've started to practice.
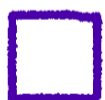
☐ **Make a list of other services and platforms that you need to integrate with the PIM software.** That will help you to understand what connectors you need; for example, for the CMS where your online store is hosted, or to connect with catalog design programs or inventory management software.

☐ **Prepare your catalog structure.** The way information is managed in the PIM solution is quite clear and simple. You have to think about how to transfer your information to the model that we will show you in the examples (and, in many cases, it will be very similar to what you already have). We recommend having a diagram with clear families and categories – and taking this task into account in the initial phases.

☐ **Think about if you also want to overhaul your website.** Implementing a PIM solution could be a good opportunity to change the image of your online shop, but in that case you will need a web designer as well. Having someone who is familiar with the way Sales Layer works can make integration much quicker and robust.

☐ **Anticipate extra configuration tasks.** A PIM service is mighty, but it cannot directly cover third-party integration because too many factors are at play like server configuration, previously installed plugins, and software versions. For that, you'll need specialized tools in your PIM solution and we recommend you trust partners who are familiar with the PIM software firsthand.

☐ **Set timeframes.** Many factors influence onboarding, and depending on the complexity of the integration you want, you'll need more or less time. That's why it's important for you to set out phases and timeframes.

☐ **Rely on our Customer Success team.** At Sales Layer, we give you guidance and tips and we'll regularly check how your project is moving forward. Good communication is key for informing you of new features, anticipating and solving problems that you commonly have with the software, and getting to know firsthand your user experience with the PIM system.

☐ **Set aside time for tests.** Your PIM system's onboarding could be fast, but you should always set aside time for preparation and testing, which will depend on your catalog's volume. It is also important to have a bit of time set aside for testing the implementation of your connectors.

All PIM software features

Centralization
in one single place that is accessible from anywhere and any terminal

1

2

Easy editing
of data, images, and translations

Connection
with different channels (web, ecommerce, print, etc.)

3

4

Importing and exporting
via Excel, CSV, and XLSX

APIs
available for custom configuration

5

6

Different **field types** to store data

Options for **mass modifications or block-based modifications**

7

8

Quality reports
on product information

Change log
and editing permissions control

9

10

Generation of **backup copies**

Plugin catalog
for platforms, marketplaces, and print

11

12

A specialized network of partners
for PIM tools and services: marketing, consultancy, technical implementation, analysis, etc

Support center with helpful resources:
videos, tutorials, guides, practical examples, etc.

13

5

Quality catalogs: Complete product information

Classification by family, category, label, and channel

Product editing in **visible and hidden mode**

Custom view in table format

Product management with **multiple variants**

Search filters to refine results

Detection of omission of required content

Completion reports for the data of each product

**Machine translation** in more than 150 languages
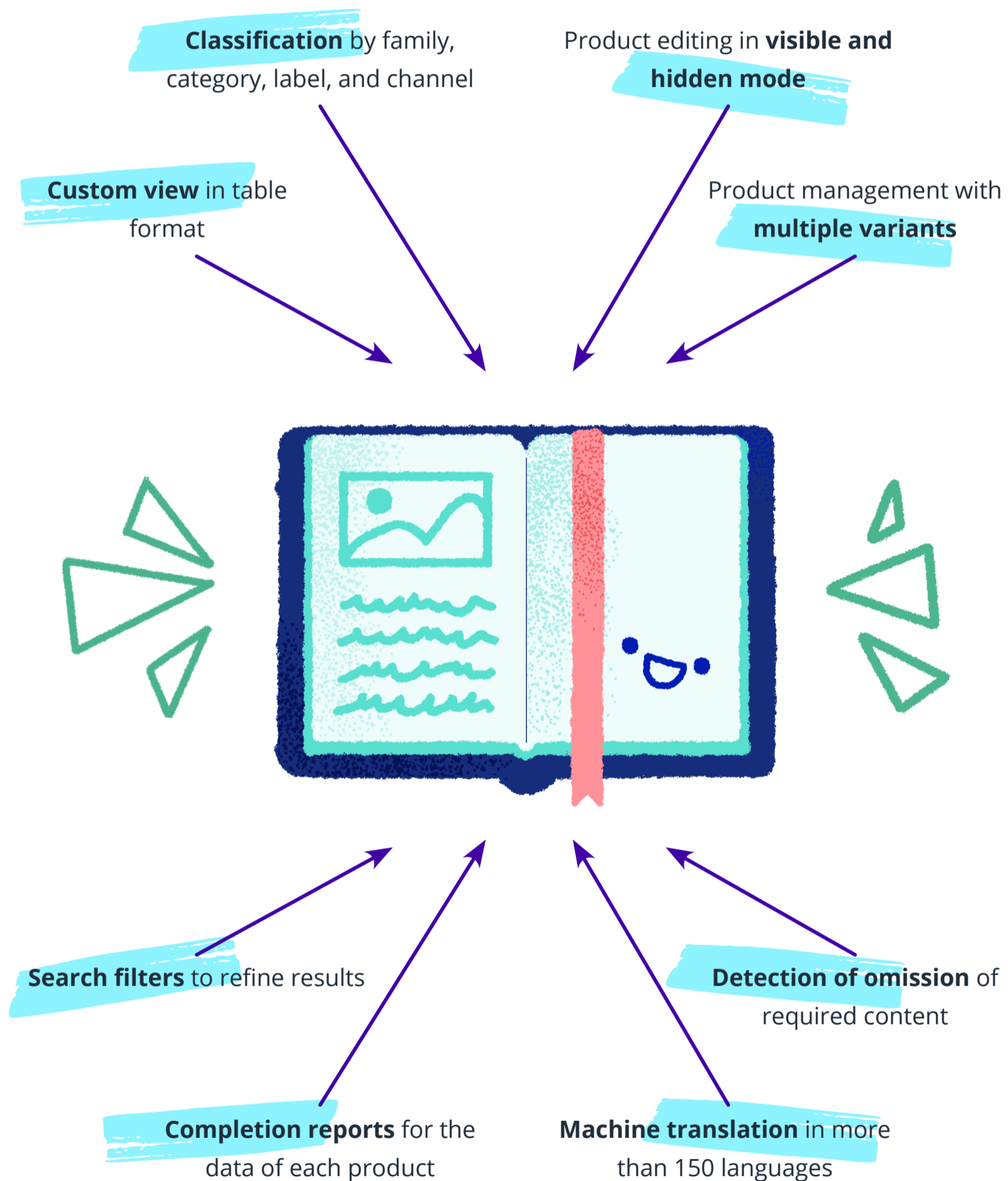
Premium features for when you want to go a step further

Instant Catalogs

[This exclusive Sales Layer function](#) gives you absolute freedom to share the information stored in your PIM software.

Instant Catalogs allow you to create microsites with whatever products from your catalog you choose, which can then be shared openly or by means of password-protected access with whomever you want and whenever you want.

This is the most convenient, fastest, and easiest way to create websites to share parts of your catalog without having to invest long hours designing and selecting. Everything is within easy reach from the PIM platform.
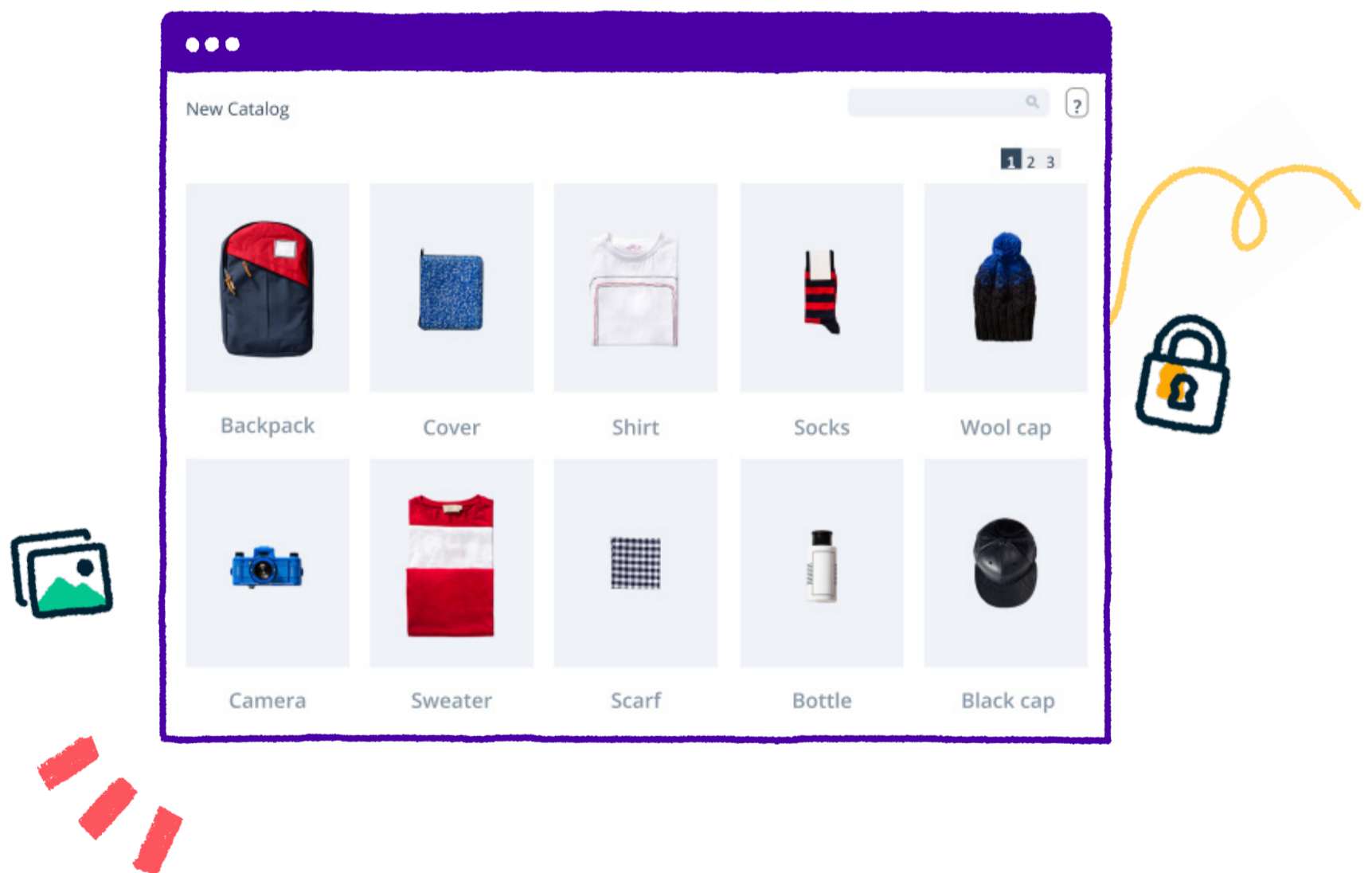
Workflows

Workflows (or editing groups) are another of the most useful extra features of a PIM solution. Workflows can be created with supervisors who review the work of the editors. This allows user access to certain products, fields, and languages – if there are teams in several countries – to be limited and managed. It keeps people from changing things they shouldn't change.
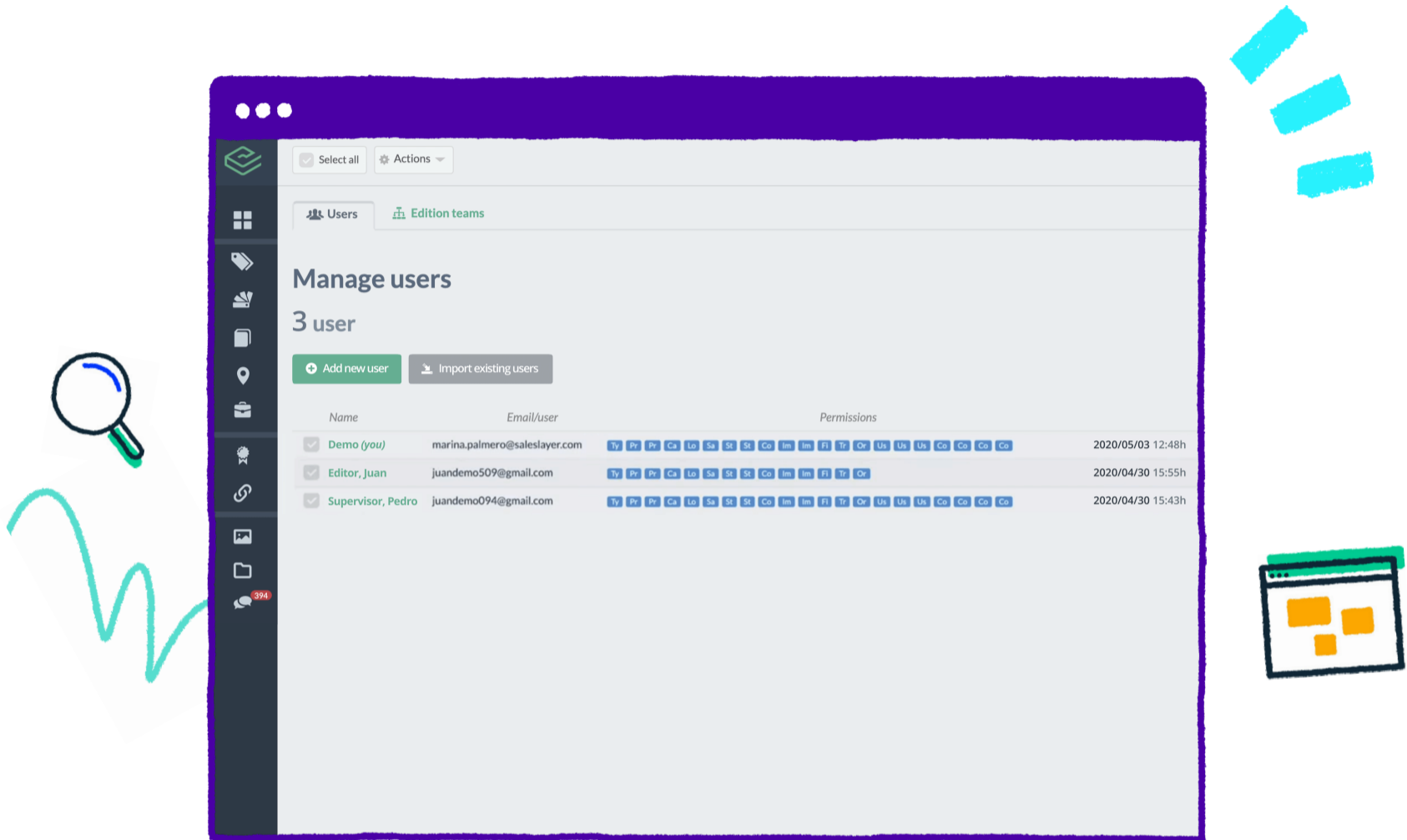
A PIM solution is a very valuable and necessary tool in this day and age for omnichannel sales, but you have to understand the challenges of implementing any piece of software and have clear objectives. Follow our advice and...

WE'LL HELP YOU BRING YOUR PROJECT TO FRUITION!

Find out more at
saleslayer.com
Compare our packs at **saleslayer.com/pricing** or request a free demo at
content.saleslayer.com/access-free-30-day-trial