Product Variation User Guide

Product Variation Actions

Add Product Variation

To start this action, click the   Add Product Variation   button above the Product Variation listing.

Creates a new Product Variation.

When this action starts a form is displayed to enter the details of the Product Variation.

Each field customises or controls some aspect of the Product Variation display or behaviour.

Some fields are required and must be entered before the Product Variation can be added, the required fields are Name.

Although some fields are not required, it is best practice to populate these, including .

Most fields are optional, and are often prefilled with a good default so these may not need to be changed. These optional fields allow further customisation.

Alongside most fields is a small ? icon with further help for each field. This information is included at the end of this document.

View

To start this action, select the Product Variation you need to work on, and click the 🔍 View button in the ⋮ More Menu on that row.

Display the selected Product Variation.

This action displays the Product Variation similarly as for an Edit Action, except none of the fields are editable.

Useful for reviewing records without making any changes.

Edit

To start this action, select the Product Variation you need to work on, and click the ✏ button on that row.

Edits an existing Product Variation.

When this action starts a form is displayed with the existing Product Variation and any previous information entered.

Each field customises or controls some aspect of the Product Variation display or behaviour.

When editing it is advisable to only change what is needed and most fields may not need to be changed. These other fields allow further customisation.

Alongside most fields is a small ? icon with further help for each field. This information is included at the end of this document.

Copy

To start this action, select the Product Variation you need to work on, and click the ⧉ Copy button in the ⋮ More Menu on that row.

Copies an existing Product Variation.

The selected Product Variation is copied and the word (Copy) will be added to the name of the new Copy

Delete

To start this action, either select the Product Variation to work on and click the 🗑 button on that row. Or CTRL+click to select multiple Product Variations and click the 🗑 button above the Product Variation listing.

Deletes an existing Product Variation.

When this action starts a screen is displayed to check for Confirmation before the Action continues.

On this screen a list of warnings may be provided to show the impact of deleting this Product Variation.

Search

To start this action, click the 🔍 button above the Product Variation listing.

Allows a Search of Product Variations.

This allows a simple text search across all Product Variations.

To search a specific field select the field from the drop down list

Adv. Search

To start this action, click the 🔍 Adv. Search button above the Product Variation listing in the ⋮ More Menu.

Allows an Advanced Search of Product Variations.

The Advanced Search opens a new section at the bottom of the Product Variations and allows several distinct features:

- Multiple Search Lines : allows Product Variation matches to be identified where more than one search criteria is required

- Nested Searches : allows a combination of AND and OR logic to find results

- Saved Filters : allows a search to be saved as a Filter

- Export : allows the results of the search to be exported and worked on separately

Refresh

To start this action, click the ↻ Refresh button above the Product Variation listing in the ⋮ More Menu.

Refresh the list of Product Variations.

Allows the list of records to be refreshed.

Although the records in the system will automatically update if a another Admin is using the system at the same time, the Refresh button allows the list to be manually updated.

Export to List

To start this action, click the ☁ Export to List button above the Product Variation listing in the ⋮ More Menu.

Export the Product Variation results shown to a List.

An Export List can be downloaded as a CSV file, or through any number of customised Export Templates.

Export to List will begin the process of Exporting the Product Variations shown.

Once the data is exported it is available to download as a CSV file with all columns.

A list of Export Templates for Product Variations will be shown, select the Export Template to Print, Export to Document, Export to CSV or Email.

Before using a template an opportunity to amend the template is provided.

See Export Templates for more information on Managing Export Templates.

Export All

To start this action, click the ⤓ Export All button above the Product Variation listing in the ⋮ More Menu.

Export all the Product Variations to a List.

Exactly as for "Export to List" except rather than just Exporting the Product Variation results shown, all Product Variations will be expored.

Export Item

To start this action, select the Product Variation you need to work on, and click the ☁ Export Item button in the ⋮ More Menu on that row.

Export only the selected Product Variation to a List.

Exactly as for "Export to List" except rather than just Exporting the Product Variation results shown, only the selected Product Variation is exported.

Choose Columns

To start this action, click the ⚙ Choose Columns button above the Product Variation listing in the ⋮ More Menu.

Changes the Columns shown in the Product Variation Listing.

The Choose Columns screen shows the Selected Columns on the left, and the Product Variation Columns available on the right.

Drag and Drop column names between the two columns.

Alternatively double click on a column name to move it from one list to the other.

On the left the Selected Columns can be dragged up and down to change the ordering in the Product Variation Listing.

Manage Filters

To start this action, click the ⎓ Manage Filters button above the Product Variation listing in the ⋮ More Menu.

Creates custom Filters for Product Variations.

A Filter is a saved Advanced Search. Multiple Filters can be created for Product Variations.

These Filters appear at the top of the Product Variation listing.

When the Filter is selected the results are restricted to only include those which match the Filter.

The Manage Filters action shows a list of existing Filters for Product Variations where these can be managed.

Product Variation Field Reference

Name

This field is mandatory.

Name for this variation. This name is used to select this variation from any others defined when entering product details