

Perfion Demo Perfion

2025-R3



Perfion Basics

Things to show at the beginning of a demo

PIM, DAM and all related entities

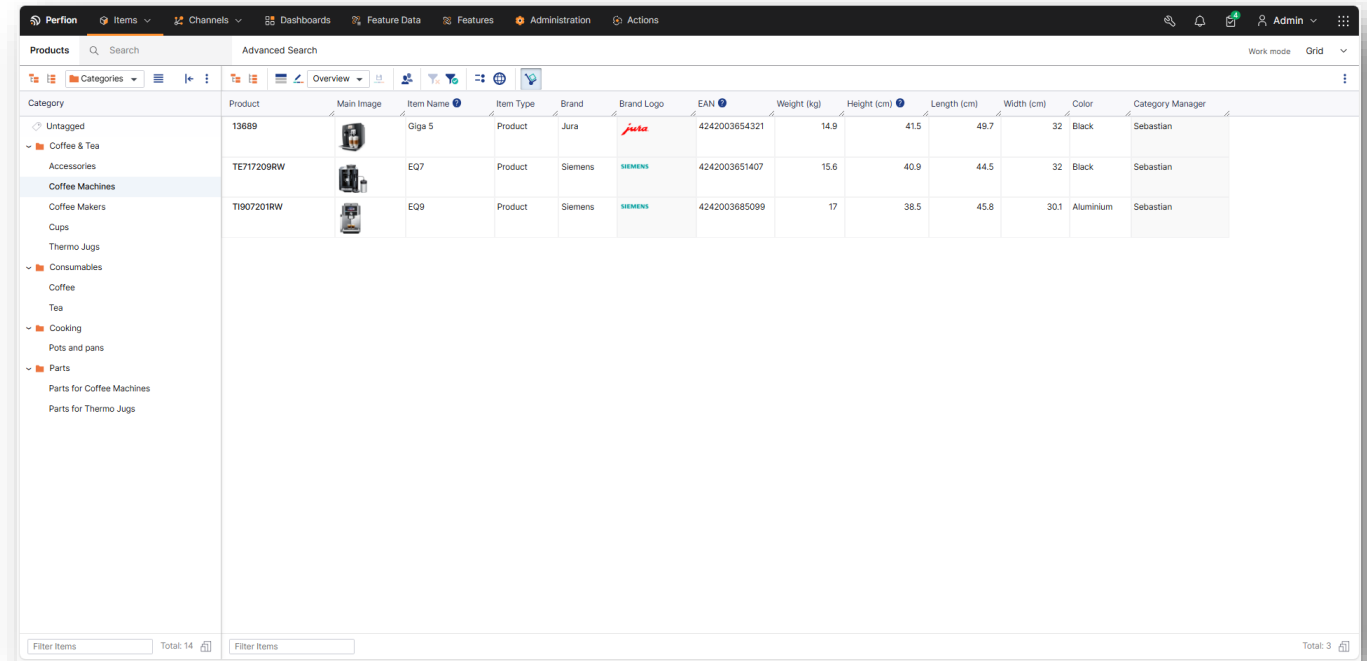
- Show *Items* as main navigation point
- Explain flexible data model – any entity you need
- Take a tour around images and explain DAM
- Use *Card layout* and *Item Details* to explain item centric data management







The top screenshot displays the 'Images' management interface. It features a search bar, a navigation menu on the left with categories like 'Untagged', 'Lifestyle', 'Coffee Indoor', and 'Products', and a main area showing a grid of images. One image is titled 'Ariol Table Shot 2.jpg' and another is 'Ariol Table Shot.jpg'. A sidebar on the right offers actions like 'Show all', 'Masterdata', 'Print', 'Image Data', and 'Content Store'. Below the images, there's a 'Comment' section and a 'Print' button.

The bottom screenshot shows the 'Item Details' view for a product. The left sidebar lists various product categories. The main area is divided into sections: 'Masterdata', 'Comment', and 'Specifications'. The 'Masterdata' section includes fields for 'Item Name' (Giga 5), 'Product Name' (Giga 5), 'EAN' (4242003654321), 'Main Image' (13689.PNG), 'Perflon ID' (792), 'Category' (Coffee Machines Sebastian), and 'Brand' (Jura United Kingdom). There are also checkboxes for 'Localizable', 'Empty', 'Populated', and 'All'. At the bottom, there are 'Save & Close', 'Save', and 'Cancel' buttons.

Grid

- Go back to Coffee Machines
- Switch to *Grid* and show capabilities:
 - Single update
 - Multi update
 - Copy-paste
 - Previous values
- Update *Brand* to show related values *Brand Logo*
- Drag-drop to another category to show related *Category Manager*



Category	Product	Main Image	Item Name	Item Type	Brand	Brand Logo	EAN	Weight (kg)	Height (cm)	Length (cm)	Width (cm)	Color	Category Manager
Untagged	13689		Giga 5	Product	Jura		4242003654321	14.9	41.5	49.7	32	Black	Sebastian
Coffee & Tea	TE717209RW		EQ7	Product	Siemens		4242003651407	15.6	40.9	44.5	32	Black	Sebastian
Coffee Machines	TH907201RW		EQ9	Product	Siemens		4242003685099	17	38.5	45.8	30.1	Aluminium	Sebastian

Hierarchies and Inheritance

- Switch to *Thermo Jugs* and showcase traditional product-variant hierarchy and inheritance
- Switch to *Pots and Pans* and showcase multi-level hierarchies and inheritance

The top screenshot displays a product catalog for 'Thermo Jugs'. The table shows the following data:

Category	Product	Main Image	Item Name	Item Type	Brand	Brand Logo	EAN	Weight (kg)	Height (cm)	Length (cm)	Width (cm)	Color	Category Manager
Untagged	STELTON EM77			Product	Stelton			0.34	30	15	7		Viktorija
Coffee & Tea	958ST		Vacuum Jug EM77 Purple	Variant	Stelton		5709846009721	0.34	30	15	7	Purple	Viktorija
	973ST		Vacuum Jug EM77 Milano Sand	Variant	Stelton		5709846012004	0.34	30	15	7	Milano Sand	Viktorija

The bottom screenshot displays a product catalog for 'Pots and Pans'. The table shows the following data:

Category	Product	Main Image	Item Name	Item Type	Brand	Brand Logo	EAN	Weight (kg)	Height (cm)	Length (cm)	Width (cm)	Color	Category Manager
Untagged	Cocotte round			Product	Staub					12	12		Stephen
Coffee & Tea	Black				Staub					12	12	Black	Stephen
	Blue				Staub				20	12	12	Dark Blue	Stephen
	Gray				Staub				20	12	12	Gray	Stephen
Consumables	1101218		Cocotte round, Gray, 12cm	Variant	Staub		3272341012180	1.5	20	12	12	Gray	Stephen
	1101418		Cocotte round, Gray, 14cm	Variant	Staub		3272341014184	1.5	20	12	12	Gray	Stephen
	1101618		Cocotte round, Gray, 16cm	Variant	Staub		3272341016188	1.5	20	12	12	Gray	Stephen
	1101818		Cocotte round, Gray, 18cm	Variant	Staub		3272341018182	1.5	20	12	12	Gray	Stephen
	1102018		Cocotte round, Gray, 20cm	Variant	Staub		3272341020185	1.5	20	12	12	Gray	Stephen
	Oval pot			Product	Staub				22	32	14		Stephen

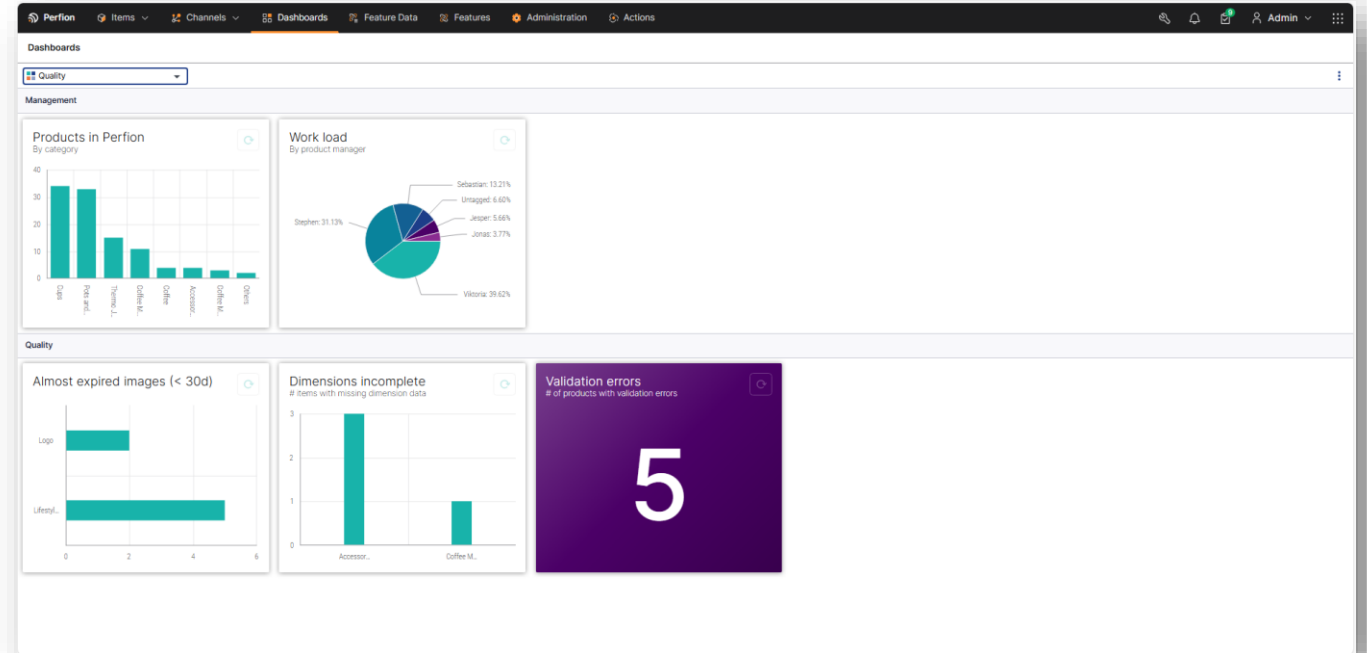


Quality

Show how Perfion can ensure high data quality

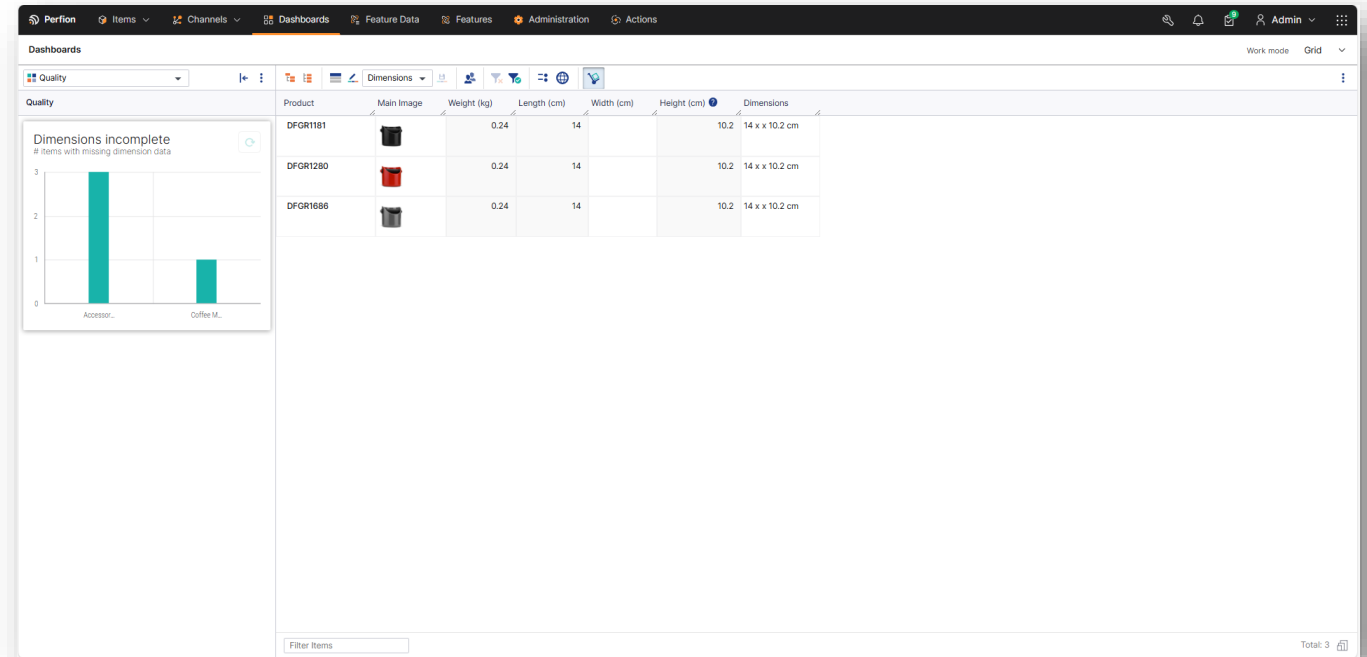
Quality

- Go to Quality dashboard
- Demonstrate two essential PIM capabilities:
 - *Data completeness*
 - *Data quality*



Data completeness

- Use widget Dimensions incomplete
- Fill in the blanks
- Potentially highlight how Dimensions is auto-populated via a formula



Data quality

- Use widget Validation errors
- Use the ?-icons to show why cells are colored
- Select the two yellow cells and run context action **Item Name: Convert ALL CAPS to Title Case**
- Refresh and show change
- Change a red cell to one digit after comma

The screenshot shows the Perfion dashboard interface. On the left, a 'Validation errors' widget displays a large blue box with the number '5' and the text '# of products with validation errors'. The main area contains a table with columns: Product, Item Name, Main Image, EAN, Height (cm), Width (cm), and Length (cm). The table data is as follows:

Product	Item Name	Main Image	EAN	Height (cm)	Width (cm)	Length (cm)
1101225	Cocotte round, Black, 12cm		3272341012258	20.005	12	12
1101425	Cocotte round, Black, 14cm		3272341014252	20.005	12	12
1101625	Cocotte round, Black, 16cm		3272341016256	20.005	12	12
1208-PEBO	PEBO VACUUM COFFEE MAKER		0727015107516	35.152	12	16
X-634	THEO SLOW BREW		6584125469125	35.152	12	13.5

The table includes a 'Validated features' dropdown menu and a 'Filter items' input field at the bottom. The total number of items is 125.

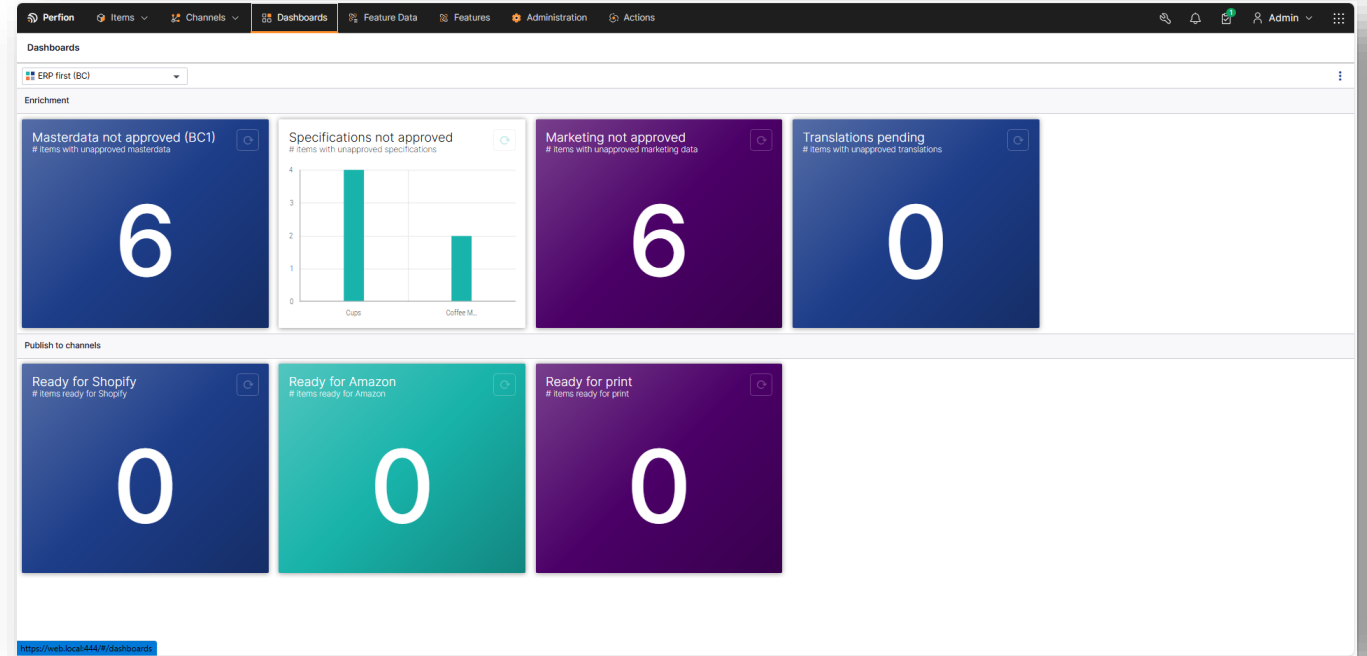
Process

ERP First



ERP First (BC/SAP)

- Run one of the Sync actions:
 - Sync products from BC to Perfion
 - Sync products from SAP to Perfion



Masterdata

- Load images via context action
- Show Primary packaging
 - Pre-populated with all data

Masterdata not approved (BC1)
6 items with unapproved masterdata

Product	Main Image	Item Name	Item Type	Product Name	Exists in BC	RRP BC (€)	Supplier Code	Category	EAN	Primary packaging	Masterdata (%)	Masterdata OK
Fossil MUG			Product	Fossil mug 35 cl			2001EN	Cups		Primary packaging	87%	<input type="checkbox"/>
38675-01		Fossil mug 35 cl White	Variant	Fossil mug 35 cl	<input checked="" type="checkbox"/>	8.35	2001EN	Cups	9363527826736	Primary packaging	87%	<input type="checkbox"/>
38675-04		Fossil mug 35 cl Beige	Variant	Fossil mug 35 cl	<input checked="" type="checkbox"/>	8.35	2001EN	Cups	9363527826737	Primary packaging	87%	<input type="checkbox"/>
38675-05		Fossil mug 35 cl Green	Variant	Fossil mug 35 cl	<input checked="" type="checkbox"/>	8.35	2001EN	Cups	9363527826738	Primary packaging	87%	<input type="checkbox"/>
SES878BSS		Barista Pro	Product	Barista Pro	<input checked="" type="checkbox"/>	995.95	2001EN	Coffee Machines	9312432032810	Primary packaging	87%	<input type="checkbox"/>
SES990		Oracle Touch	Product	Oracle Touch	<input checked="" type="checkbox"/>	949.95	2001EN	Coffee Machines	9355973007480	Primary packaging	87%	<input type="checkbox"/>

Specifications

- All products have Supplier Code = 2001EN
- This supplier does not use the supplier portal
- Fill in missing data

The screenshot shows the Perfion ERP system interface. The main dashboard is titled 'Specifications' and displays a table of product specifications for 'FOSSIL MUG'. The table has columns for Product, Main Image, Item Name, Item Type, Product Name, Supplier Code, Supplier Portal, Material, Diameter (cm), Volume (l), Brand, Color, and Specifications OK. The table lists four variants of the mug, all with a Supplier Code of 2001EN and a Specifications OK status of 'No'.

Product	Main Image	Item Name	Item Type	Product Name	Supplier Code	Supplier Portal	Material	Diameter (cm)	Volume (l)	Brand	Color	Specifications OK
FOSSIL MUG			Product	Fossil mug 35 cl	2001EN	No		8.5	0.35	Scandi Living		<input type="checkbox"/>
38675-01		Fossil mug 35 cl White	Variant	Fossil mug 35 cl	2001EN	No		8.5	0.35	Scandi Living	White	<input type="checkbox"/>
38675-04		Fossil mug 35 cl Beige	Variant	Fossil mug 35 cl	2001EN	No		8.5	0.35	Scandi Living	Beige	<input type="checkbox"/>
38675-05		Fossil mug 35 cl Green	Variant	Fossil mug 35 cl	2001EN	No		8.5	0.35	Scandi Living	Green	<input type="checkbox"/>

On the left side of the dashboard, there is a bar chart titled 'Specifications not approved' showing the number of items with unapproved specifications for 'Cups' (4) and 'Coffee M.' (2).

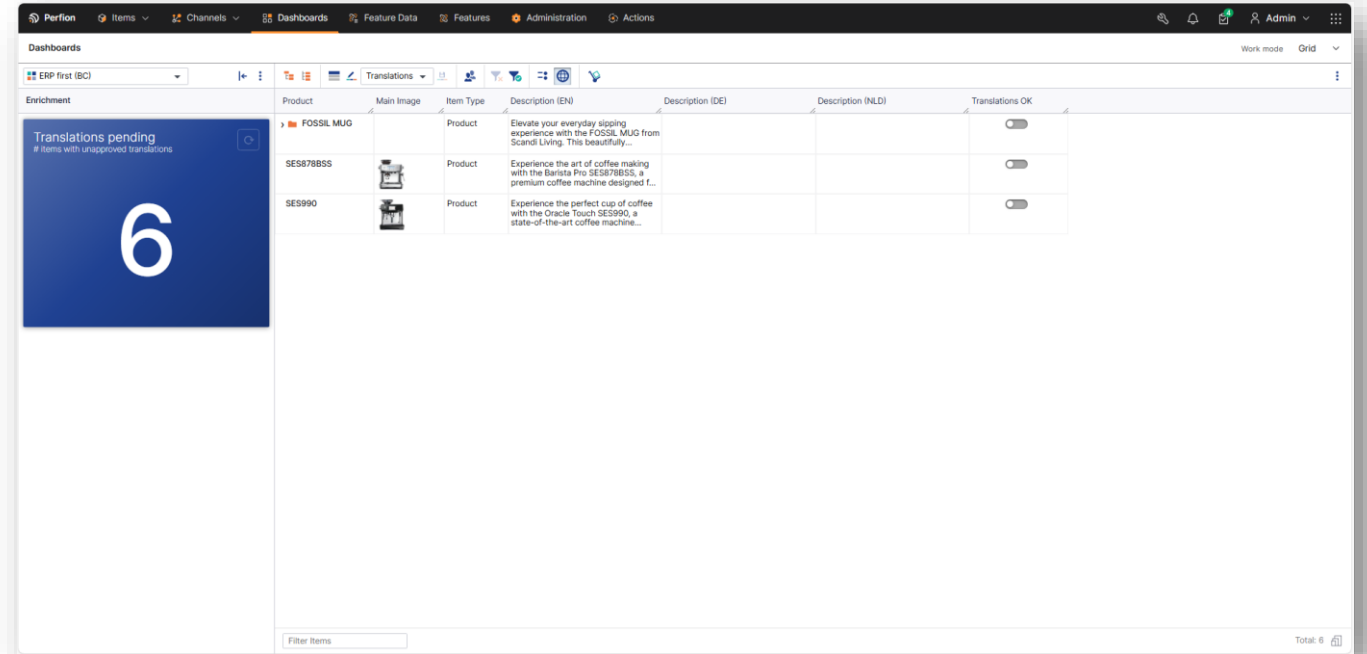
Marketing

- All data can be added at “product level”
- Add description for first product via new context option **Create with AI**
 - Use **Cups** template
- Add descriptions for other products via normal context action
 - Explain how we like to do things in bulk



Product	Main Image	Item Name	Item Type	Product Name	Subheader	Description	Related Products	Lifestyle Images	Marketing Completeness	Marketing OK
FOSSIL MUG			Product	Fossil mug 35 cl		A subtle speckled glass with a contrasting bottom			50%	<input type="checkbox"/>
SE587855		Barista Pro	Product	Barista Pro		Third wave speciality coffee at home			50%	<input type="checkbox"/>
SE5990		Oracle Touch	Product	Oracle Touch		An espresso coffee machine with automatic controls			50%	<input type="checkbox"/>

Translations

- Demonstrate this with Admin user
 - Don't change to localized translation users
- Only Description included in view
 - Makes it look better if you translate to more than one language



The screenshot shows the 'Translations' dashboard in the Perfon ERP First (BCI) system. The dashboard includes a navigation bar at the top with 'Perfon', 'Items', 'Channels', 'Dashboards', 'Feature Data', 'Features', 'Administration', and 'Actions'. The main content area is titled 'Dashboards' and shows a table of product translations. A blue card on the left indicates 'Translations pending' with a count of 6 items. The table has columns for Product, Main Image, Item Type, Description (EN), Description (DE), Description (NLD), and Translations OK. The table contains three rows of data for coffee-related products.

Product	Main Image	Item Type	Description (EN)	Description (DE)	Description (NLD)	Translations OK
FOSSIL MUG		Product	Elevate your everyday sipping experience with the FOSSIL MUG from Scandi Living. This beautifully...			<input type="checkbox"/>
SES87855		Product	Experience the art of coffee making with the Barista Pro SES87855, a premium coffee machine designed f...			<input type="checkbox"/>
SES990		Product	Experience the perfect cup of coffee with the Oracle Touch SES990, a state-of-the-art coffee machine...			<input type="checkbox"/>

Shopify

- Expand and explain how Shopify relies on the Item Type
- **Color** must be added as Variant Feature to FOSSIL MUG
 - Sets Color as variant dimension in Shopify
- Shopify Collections (= their term for category):
 - **Serving** for FOSSIL MUG
 - **Brewing** for coffee machines
- Check all 6 items in Publish to Shopify
- Start the Perfion-Shopify Connector
- Open Shopify and see result
- Refresh grid to see ShopifySyncDate

The screenshot shows the Perfion ERP interface. On the left, a 'Publish to channels' panel displays 'Ready for Shopify' with 6 items ready for Shopify. The main grid shows a list of products:

Product	Main Image	Item Name	Item Type	Product Name	Variant Feature(s)	Shopify Collections	Publish In Shopify	Shopify OK	ShopifySyncDate
FOSSIL MUG			Product	Fossil mug 35 cl			<input type="checkbox"/>	<input type="checkbox"/>	
38675-01		Fossil mug 35 cl White	Variant	Fossil mug 35 cl			<input type="checkbox"/>	<input type="checkbox"/>	
38675-04		Fossil mug 35 cl Beige	Variant	Fossil mug 35 cl			<input type="checkbox"/>	<input type="checkbox"/>	
38675-05		Fossil mug 35 cl Green	Variant	Fossil mug 35 cl			<input type="checkbox"/>	<input type="checkbox"/>	
SES878BSS		Barista Pro	Product	Barista Pro			<input type="checkbox"/>	<input type="checkbox"/>	
SES990		Oracle Touch	Product	Oracle Touch			<input type="checkbox"/>	<input type="checkbox"/>	

Below the grid, a terminal window shows the following logs:

```

[15:15:58 INF] The Shopify Connector is using Shopify GraphQL API version 2025-07.
[15:16:04 INF] Starting a new Delta synchronization.
[15:16:09 INF] Category 1 out of 5
[15:16:09 INF] Category 2 out of 5
[15:16:10 INF] Category 3 out of 5
[15:16:10 INF] Category 4 out of 5
[15:16:10 INF] Category 5 out of 5
[15:16:11 INF] The product Organic Black Tea Earl Grey has shopify id 9838232142153 in Perfion but is not found in shopify. The product will be created with a new id
[15:16:11 INF] The product 14 Days Energy Herbal Tea has shopify id 9838232174921 in Perfion but is not found in shopify. The product will be created with a new id
[15:16:11 INF] 2 products to be synchronized
[15:16:11 INF] Product 1 out of 2: Organic Black Tea Earl Grey
  
```

After restore of demo database, run Shopify connector again to reset Shopify.

Amazon

- Run context action at product level
- Amazon file and images are now output to subfolders under _Export
 - Same for all other output demo files

The screenshot displays the Perfion ERP interface. The top navigation bar includes 'Perfion', 'Items', 'Channels', 'Dashboards', 'Feature Data', 'Features', 'Administration', and 'Actions'. The main content area shows a 'Dashboards' view for 'ERP first (BC)' with a 'Publish to channels' section. A blue box with the number '6' and the text 'Ready for Amazon' is visible. Below this is a table of products:

Product	Main Image	Item Name	Amazon Title	Amazon Category	SEO keywords	Amazon OK
FOSSIL MUG			Scandi Living Fossil mug 35 cl, 0.35 l			<input type="checkbox"/>
SES878BSS		Barista Pro	Barista Pro, Aluminium, 1400W, 1.1m Cord, 40.5 x 35.5 x 40.6 cm			<input type="checkbox"/>
SES990		Oracle Touch	Oracle Touch, Black, 1200W, 1m Cord, 37 x 38 x 45 cm			<input type="checkbox"/>

Overlaid on the bottom right is a Windows File Explorer window titled 'ActionSources'. The address bar shows the path: 'This PC > Local Disk (C:) > Perfion Data > ActionSources'. The file list shows several folders:

Name	Date modified	Type	Size
_Export	10/28/2025 11:56 AM	File folder	
_Import	9/15/2025 10:32 AM	File folder	
DPP stuff	7/4/2025 1:40 PM	File folder	
GS1	7/4/2025 1:40 PM	File folder	
New Product Idea files	10/31/2025 3:01 PM	File folder	
Supplier portal	7/4/2025 1:41 PM	File folder	

The status bar at the bottom of the File Explorer indicates '6 items | 1 item selected'.

Print

- Pricelist can be checked for all 6 items
 - Only the normal 5 will be included in Excel
- Datasheet Template must only be added to the 5 normal items
 - Select SKU Datasheet (1 page)
- Drag only the 5 normal items to catalog
 - Catalog does not work with virtual items

The screenshot shows the Perfion ERP First interface. A blue notification box on the left says "Ready for print" with a large white number "6". The main area displays a table of items with columns for Product, Main Image, Item Name, Product Name, Pricelist, Datasheet Template, Datasheet Link, Catalog Section, and Print OK. The table contains 6 rows of data.

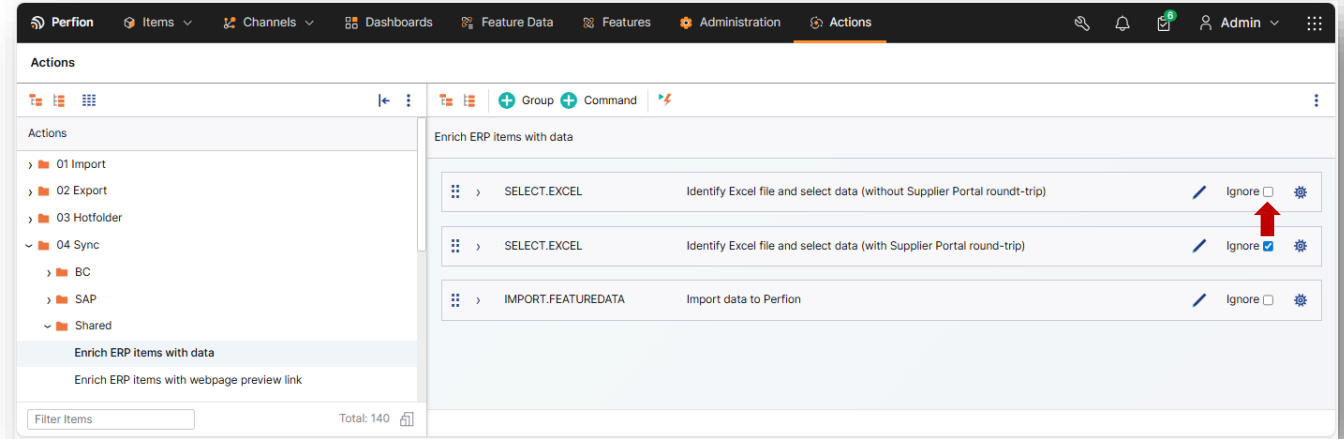
Product	Main Image	Item Name	Product Name	Pricelist	Datasheet Template	Datasheet Link	Catalog Section	Print OK
FOSSIL MUG			Fossil mug 35 cl	<input type="checkbox"/>				<input type="checkbox"/>
38675-01		Fossil mug 35 cl White	Fossil mug 35 cl	<input type="checkbox"/>				<input type="checkbox"/>
38675-04		Fossil mug 35 cl Beige	Fossil mug 35 cl	<input type="checkbox"/>				<input type="checkbox"/>
38675-05		Fossil mug 35 cl Green	Fossil mug 35 cl	<input type="checkbox"/>				<input type="checkbox"/>
SES878BSS		Barista Pro	Barista Pro	<input type="checkbox"/>				<input type="checkbox"/>
SES990		Oracle Touch	Oracle Touch	<input type="checkbox"/>				<input type="checkbox"/>

Process

ERP First – with supplier enrichment

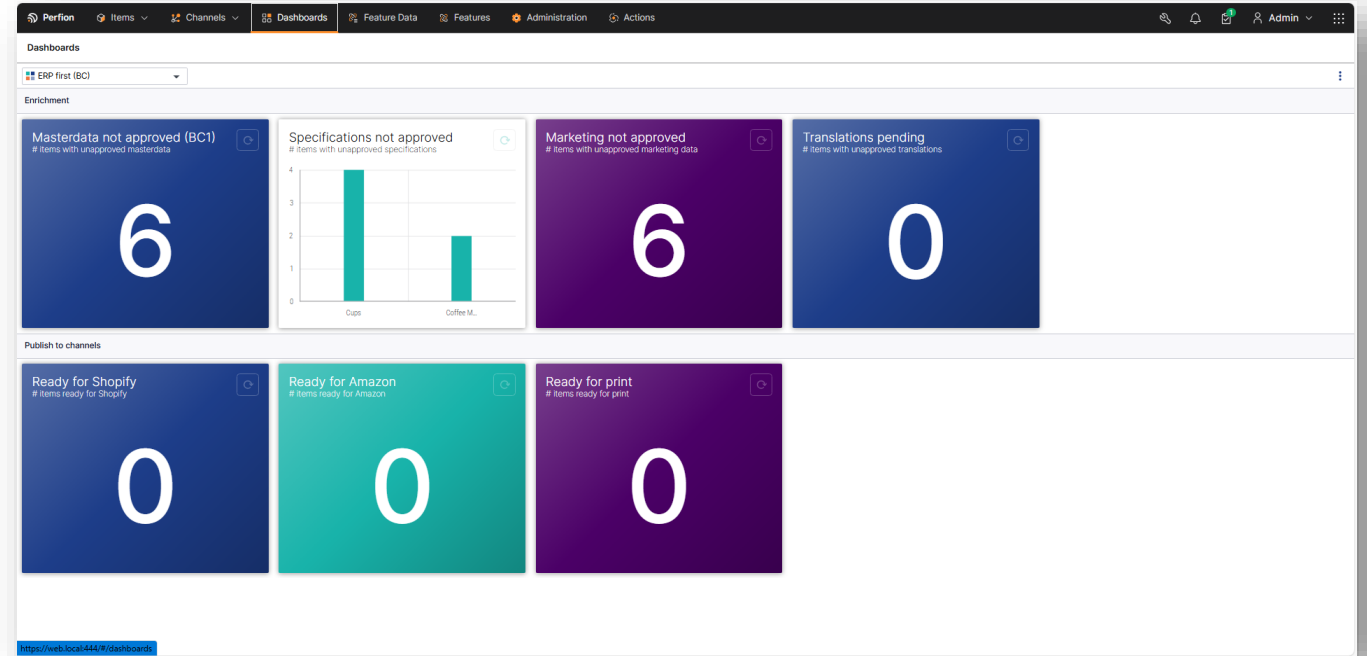
Setup

- By default, products in the ERP First process are not exposed to suppliers for enrichment
- If you want to show how ERP First-items can be exposed to suppliers for enrichment (specifications), go to the action *Enrich ERP Items with data* and move the Ignore flag from second to first row



ERP First (BC/SAP)

- Run one of the Sync actions:
 - Sync products from BC to Perfion
 - Sync products from SAP to Perfion



Masterdata

- Load images via context action
- Show Primary packaging
 - Pre-populated with all data

Product	Main Image	Item Name	Item Type	Product Name	Exists in BC	RRP BC (€)	Supplier Code	Category	EAN	Primary packaging	Masterdata (%)	Masterdata OK
Masterdata not approved (BC1) 6 items with unapproved masterdata												
FOSSIL MUG			Product	Fossil mug 35 cl			2001EN	Cups		Primary packaging	87%	87%
38675-01		Fossil mug 35 cl White	Variant	Fossil mug 35 cl	●	8.35	2001EN	Cups	9363527826736	Primary packaging	87%	87%
38675-04		Fossil mug 35 cl Beige	Variant	Fossil mug 35 cl	●	8.35	2001EN	Cups	9363527826737	Primary packaging	87%	87%
38675-05		Fossil mug 35 cl Green	Variant	Fossil mug 35 cl	●	8.35	2001EN	Cups	9363527826738	Primary packaging	87%	87%
SES878BSS		Barista Pro	Product	Barista Pro	●	995.95	2001EN	Coffee Machines	9312432032810	Primary packaging	87%	87%
SES990		Oracle Touch	Product	Oracle Touch	●	949.95	2001EN	Coffee Machines	9355973007480	Primary packaging	87%	87%

Specifications - with supplier enrichment

- The two coffee machines have supplier 6012EN
- This supplier use the supplier portal
- Products are automatically exposed in portal and supplier receives an email
- Log in to supplier portal with:
 - perfionsupplierEN1@boyum-it.com
 - PerfionDemo23
- Select the two coffee machines from dashboard
- Enrich missing values
- Check *Complete*
- Go back to Perfion
- Refresh grid to see supplier data and yellow cells
- Show and accept supplier data using method of your choice

All remaining widgets on dashboard identical to ERP First

The screenshot displays the Perfion ERP interface. The top navigation bar includes 'Perfion', 'Items', 'Channels', 'Dashboards', 'Feature Data', 'Features', 'Administration', and 'Actions'. The main dashboard is titled 'Dashboards' and shows a dropdown for 'ERP First (BC)'. A table lists coffee machines with columns for Product, Main Image, Item Name, Item Type, Product Name, Supplier Code, Supplier Portal, Water Tank Capacity (l), Cable Length (m), Power (W), Brand, Color, and Specifications OK. Two items are listed: SES878BSS (Barista Pro) and SES990 (Oracle Touch), both with Supplier Code 6012EN and Supplier Portal 'Yes'. A 'Specifications not approved' chart shows 4 cups. A 'Supplier enrichment' chart shows 2.0. A 'PRODUCTS' table shows the same two items with 'Status' and 'Completed' columns. The 'Completed' column has toggle switches for each item.

Product	Main Image	Item Name	Item Type	Product Name	Supplier Code	Supplier Portal	Water Tank Capacity (l)	Cable Length (m)	Power (W)	Brand	Color	Specifications OK
SES878BSS		Barista Pro	Product	Barista Pro	6012EN	Yes						<input type="checkbox"/>
SES990		Oracle Touch	Product	Oracle Touch	6012EN	Yes						<input type="checkbox"/>

Supplier Item Number	Item Name	Main Image	Category	Completed	Water Tank Capacity (l)	Cable Length (m)	Power (W)	Brand *	Color *
SES990	Oracle Touch		Coffee Machines	<input type="checkbox"/>					
SES878BSS	Barista Pro		Coffee Machines	<input type="checkbox"/>					



Process

Data Source First

Data Source First (BC/SAP)

- Works with two separate starting points
- Actions
 - Run both import actions:
 - Import new products from Excel
 - Import new products from XML
- Import Wizard
 - File:
 - C:\Perfion Data\ActionSources\
_Import\Excel first\New products -
Coffee Accessories Inc.xlsx
 - Import settings:
 - Header row: 3
 - Data row: 4
 - Feature: Product
 - Use AI Mapper to map three unmatched columns

The image shows two screenshots of the Perfion application interface. The top screenshot displays the 'Dashboards' section for 'Data Source first (BC)'. It features four main cards: 'Masterdata not approved (BC)' with a value of 6, 'Specifications not approved' with a bar chart showing 6 items, 'Marketing not approved' with a value of 6, and 'Translations pending' with a value of 0. The bottom screenshot shows the 'Import Wizard' dialog box, which is currently on the 'Mapping' step (step 3 of 4). The wizard is importing 'New products - Coffee Accessories Inc.xlsx'. It lists various 'Excel Caption' options with checkboxes for 'Import'. The 'Feature' is set to 'Product'. The 'Language' dropdown is set to 'EN'. The 'AI Mapper' tool is visible on the right side of the wizard.

Masterdata

- Load images via context action
- Set Item Type (Product or Variant)
- Set Category (Coffee Machines or Cups)
- Refresh to see Primary Packaging
- Approve for BC/SAP
- Switch to BC/SAP and run Release2ERP:
 - **BC:** 10 - PRODUCT
 - **SAP:** PerfionItemSync

Product	Main Image	Item Name	Item Type	Product Name	Supplier Code	Supplier RRP (€)	RRP BC (€)	Category	Primary packaging	Masterdata (%)	Approved for BC	Exists in BC
512693		Magnifica Start ECAM220.218		Magnifica Start	2001EN	1420.25				62%	<input type="checkbox"/>	●
833390		Rivella EXAM440.55.G		Rivella EXAM	2001EN	1295.95				62%	<input type="checkbox"/>	●
<div style="background-color: #0056b3; color: white; padding: 5px; display: flex; align-items: center; justify-content: center;"> 6 Masterdata not approved (BC) # Items with Unapproved Masterdata </div>												
<div style="background-color: #e0e0e0; padding: 2px;"> - Ceramic mug </div>												
388556		Ceramic mug CM191006EU Gold	Ceramic mug	Ceramic mug	2001EN	11.95				62%	<input type="checkbox"/>	●
388558		Ceramic mug CM191006EU Copper	Ceramic mug	Ceramic mug	2001EN	11.95				62%	<input type="checkbox"/>	●
427148		Ceramic mug CM191006EU Rose Gold	Ceramic mug	Ceramic mug	2001EN	11.95				62%	<input type="checkbox"/>	●

10-PRODUCT

Process Reports

General

Code: 10-PRODUCT | Last Run Date: 11/27/2025 2:44 PM

Connection Code: API | Record Root Node: //Data/Product

Description: Perfion Products

Release2BC Integration Lines | Manage

Section	Step	Table No. 1	Table Caption	Field Obs...	Field No. 1	Field Caption
→	0	27	Item	<input type="checkbox"/>	1	No.
	0	27	Item	<input type="checkbox"/>	3	Description
	0	27	Item	<input type="checkbox"/>	18	Unit Price
	0	27	Item	<input type="checkbox"/>	41	Gross Weight
	0	27	Item	<input type="checkbox"/>	1217	GTIN
	0	27	Item	<input type="checkbox"/>	5702	Item Category Code

Perion Extension Import Setup (v.2025.07) [1000240 MSSQL | 0090288900]

Name: PerfionItemSync | Number: 1 | Page size: 100

Query

```
<Query>
<Select languages='EN' />
<Feature id='ItemName' />
<Feature id='WeightKG' />
<Feature id='EANCode' />
<Feature id='SupplierRRP' />
<Feature id='relSAPGroupCode' />
</Select>
<From id='100' />
<Where>
<Clause id='Brand' operator='=' value='Normal' />
<Clause id='ApprovedSAP' operator='HAS' />
<Clause id='ModifiedDate' operator='>' value='[%LastImport]' />
</Where>
</Query>
```

Mapping

Perfion Manual Import (v.2025.07) [1000240 MSSQL | 0090288900]

Import setup: PerfionItemSync

Debug mode

Test query | Use [%LastImport] as a placeholder for the last import run time

OK Cancel Import Export

Specifications

- Select parent item and run context action
Product: Consolidate variant values
- Refresh to see how variant data has been consolidated at product level

The screenshot displays the Perfion dashboard interface. At the top, there are navigation tabs for Perflon, Items, Channels, Dashboards, Feature Data, Features, Administration, and Actions. The main content area is titled 'Product Master Data Management' and shows a table of product specifications. A 'Specifications not approved' widget on the left shows a bar chart with two bars: 'Cups' at 4 and 'Coffee M.' at 2. The table lists three 'Ceramic mug' variants with their respective item codes, names, types, product names, supplier codes, materials, diameters, volumes, brands, and colors. A context menu is open over the 'Ceramic mug' product, showing a list of actions to execute on the product, including '03 - Product: Consolidate variant values' which is highlighted.

Product	Main Image	Item Name	Item Type	Product Name	Supplier Code	Supplier Portal	Material	Diameter (cm)	Volume (l)	Brand	Color	Specifications OK
388556		Ceramic mug CMT191006EU Gold	Variant	Ceramic mug	2001EN	No	Ceramics	8.5	0.295	Ember	Gold	<input type="checkbox"/>
388558		Ceramic mug CMT191006EU Copper	Variant	Ceramic mug	2001EN	No	Ceramics	8.5	0.295	Ember	Copper	<input type="checkbox"/>
427148		Ceramic mug CMT191006EU Rose Gold	Variant	Ceramic mug	2001EN	No	Ceramics	8.5	0.295	Ember	Rose Gold	<input type="checkbox"/>

All remaining widgets on dashboard identical to ERP First

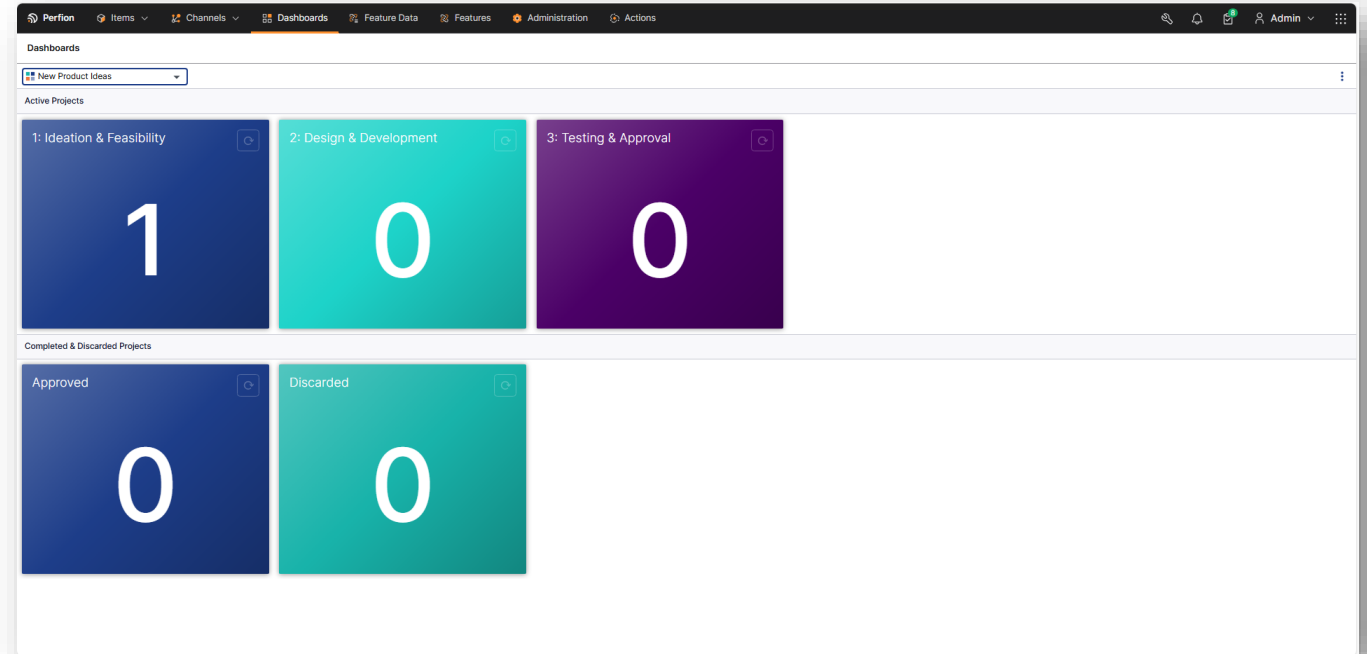


Process

New Product Ideas → Product Ideas First

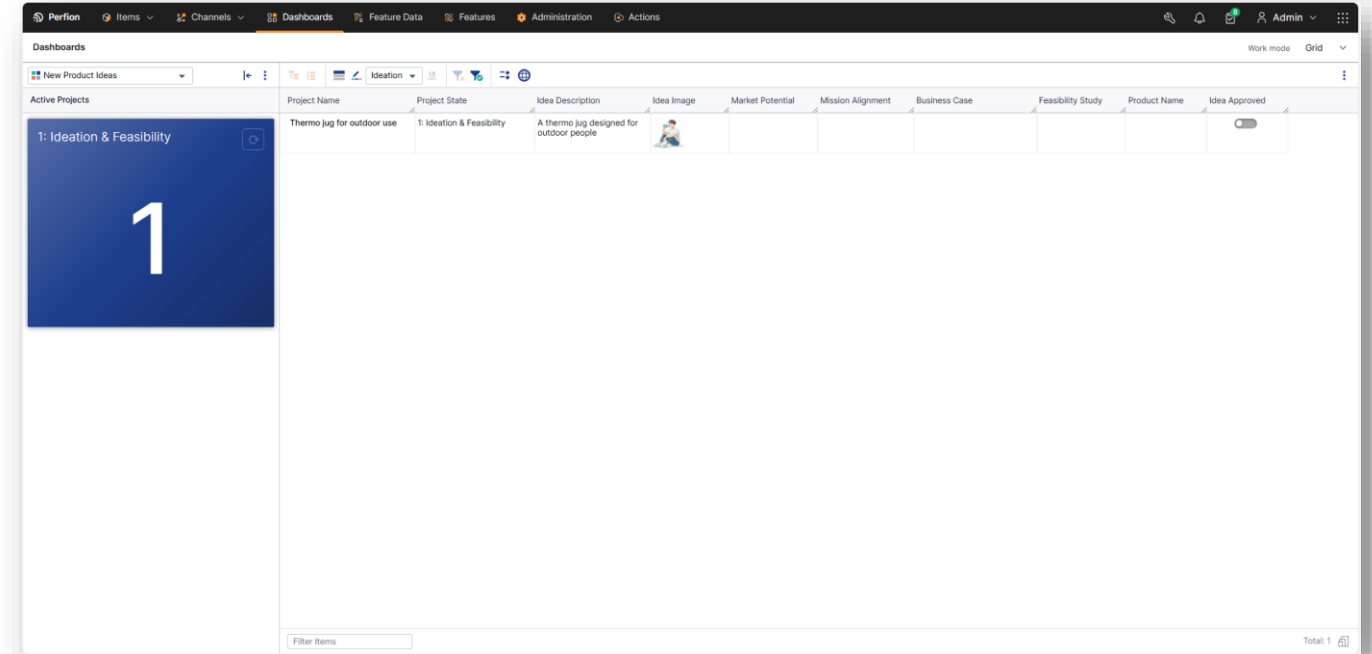
New Product Ideas

- Supports the process from Idea to Item (“projects” or “PLM Light”)
- One new idea pre-populated




1: Ideation & Feasibility

- Market Potential and Mission Alignment are text fields (write anything)
- Business Case and Feasibility Study are documents located in:
 - C:\Perfion Data\ActionSources\New Product Idea files
- Product Name must be set to **WILD**
- When approved, status auto changes



The screenshot shows a web application interface for 'Perfion' with a 'Dashboards' section. A sidebar on the left displays 'Active Projects' with a card for '1: Ideation & Feasibility'. The main content area is a table with the following columns: Project Name, Project State, Idea Description, Idea Image, Market Potential, Mission Alignment, Business Case, Feasibility Study, Product Name, and Idea Approved. The table contains one entry:

Project Name	Project State	Idea Description	Idea Image	Market Potential	Mission Alignment	Business Case	Feasibility Study	Product Name	Idea Approved
Thermo jug for outdoor use	1: Ideation & Feasibility	A thermo jug designed for outdoor people							<input type="checkbox"/>

At the bottom of the table, there is a 'Filter Items' input field and a 'Total: 1' indicator.

2: Design & Development

- Upload three WILD images to Product Designs
- Set Coffee World as Manufacturer
- Upload doc to Prototype Test Results
- In Variants:
 - Select Category and Material
 - Select **Black, Brown** and **Chalk** as Colors
 - Select **0.5 L** as Sizes
- Run context action Create Color / Size Variants
- Refresh and show color/size child items
- Close and approve D&D

The screenshot displays the Perfion software interface. The main dashboard shows a project named 'Thermo jug for outdoor use' in the '2: Design & Development' phase. A modal dialog titled 'Execute action on Variants' is open, showing the following details:

Style No	Category	Material	Variant Color(s)	Variant Size(s)
34000	Thermo Jugs	Glass / Plastic	Black Brown Chalk	0.5 L

The dialog also shows the action '01 - Create Color / Size Variants' and the option 'Selected Items' selected. The 'Execute' button is highlighted in green.

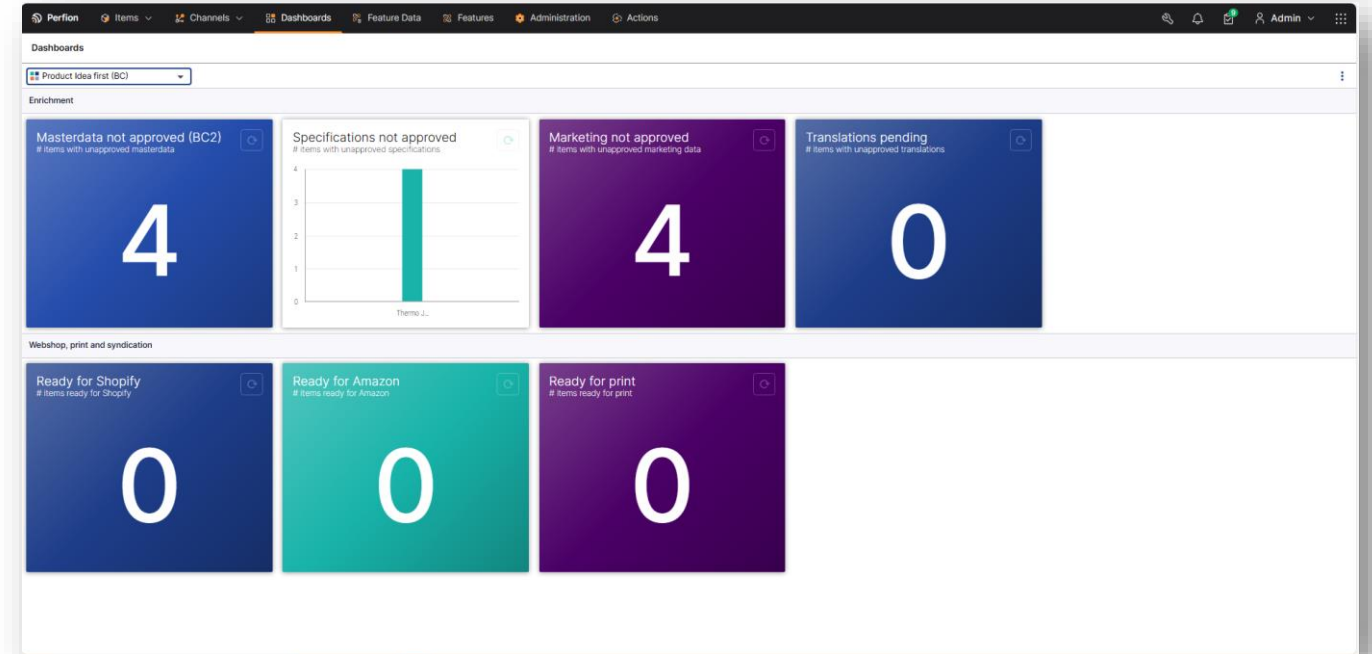
3: Testing & Approval

- Complete fields and approve for production
- This moves Idea item to Approved on the dashboard and is the end of the ideation process
- Continue from dashboard **Product Idea First**

Project Name	Project State	User Tests OK	Production Tests OK	Go-To-Market Strategy	Global Launch Date	Approved for Production	Idea Description	Idea Image	Product Name
Thermo jug for outdoor use	3: Testing & Approval	<input type="checkbox"/>	<input type="checkbox"/>			<input checked="" type="checkbox"/>	A thermo jug designed for outdoor people.		WILD

Product Idea First (BC/SAP)

- To be used after New Product Ideas
- Four product items from ideation process are ready for processing



Masterdata

- *NOTE: This widget is mainly focused on BOMs*
- Images must be loaded via context action
- Add **15.95** as SupplierRRP
- In Components, select the three components under Parts → Parts for Thermo Jugs
- In Resource, select **Assembly Machine**
- In Resource Qty, type **0.1**
- Select the three Bill of Material cells (variants only) and run context action **Add BOM lines to products**
- Refresh and show a BOM
- Now approve variants for BC/SAP
- Go to BC/SAP and run item sync first and BOM sync second

All remaining widgets on dashboard identical to ERP First

Product	Main Image	Item Name	RRP BC (£)	Components	Resource	Resource Qty (hours)	Bill Of Materials	Approved for BC	Exists in BC	Masterdata OK
WILD								<input type="checkbox"/>		<input type="checkbox"/>
34000-BLK-05L		WILD-Black-0.5 L						<input type="checkbox"/>	●	<input type="checkbox"/>
34000-BRN-05L		WILD-Brown-0.5 L						<input type="checkbox"/>	●	<input type="checkbox"/>
34000-CHK-05L		WILD-Chalk-0.5 L						<input type="checkbox"/>	●	<input type="checkbox"/>

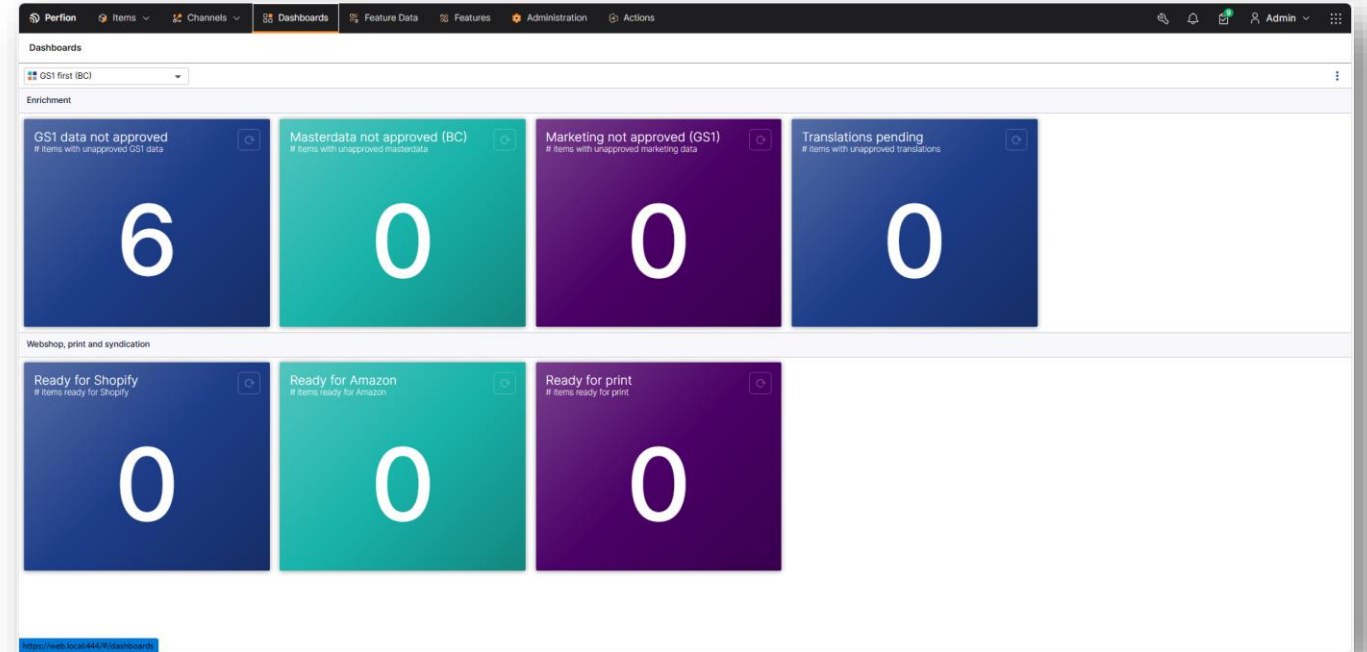
Process

GS1 First



GS1 First (BC/SAP)

- Run action GS1 → Import new product from Excel
- 6 items are created with minimal data



GS1 data not approved

- *NOTE: Make sure Supplier Data in toolbar is set to Highlight Unhandled Changes*
- Run action GS1 → Retrieve GS1 data
- Refresh grid to see images, data and yellow cells
- Show and accept supplier data using method of your choice
- Check GS1 Approved

Product	Item Name	Category	Height (cm)	Width (cm)	Height (cm)	Brand	Product type	Organic	Fair trade	Shelf life (unopened) (Days)
12847411	Espresso Maestro	Coffee						<input type="checkbox"/>	<input type="checkbox"/>	
19694292	No.1 Velutato	Coffee						<input type="checkbox"/>	<input type="checkbox"/>	
88345T	Forte espresso	Coffee						<input type="checkbox"/>	<input type="checkbox"/>	
88365T	Intenso roasting	Coffee						<input type="checkbox"/>	<input type="checkbox"/>	
96080391	ESPERTO GRANI CLASSICO	Coffee						<input type="checkbox"/>	<input type="checkbox"/>	
R47493706580279	Kenyan Gold	Tea						<input type="checkbox"/>	<input type="checkbox"/>	

NOTE: GS1 data is onboarded via the supplier portal. If you need to "reset" demo after a failed attempt, log in to supplier portal with perfionsupplierES2@boyum-it.com / [PerfionDemo23](#) and delete related supplier items.

Masterdata

- Approve for BC/SAP
- Switch to BC/SAP and run Release2ERP:
 - **BC: 10 - PRODUCT**
 - **SAP: PerfionItemSync**

Product	Main Image	Item Name	Item Type	Product Name	Supplier Code	Supplier RRP (€)	RRP BC (€)	Category	Primary packaging	Masterdata (%)	Approved for BC	Exists in BC
12847411		Espresso Maestro	Product	Espresso Maestro	BITOS1		18	Coffee	Primary packaging	100%	<input type="checkbox"/>	●
19694292		No.1 Vellutato	Product	No.1 Vellutato	BITOS1		5.9	Coffee	Primary packaging	100%	<input type="checkbox"/>	●
8834ST		Forte espresso	Product	Forte espresso	BITOS1		6.69	Coffee	Primary packaging	100%	<input type="checkbox"/>	●
8836ST		Intenso	Product	Intenso roasting	BITOS1		6.69	Coffee	Primary packaging	100%	<input type="checkbox"/>	●
96080391		Espresso Granissimo	Product	ESPRESSO GRANISSIMO CLASSICO	BITOS1		13.99	Coffee	Primary packaging	100%	<input type="checkbox"/>	●
R47493706580279		Kenyan Gold	Product	Kenyan Gold	BITOS1		7.99	Tea	Primary packaging	100%	<input type="checkbox"/>	●

10-PRODUCT

Code: 10-PRODUCT | Last Run Date: 11/27/2025 2:44 PM

Connection Code: API | Record Root Node: //Data/Product

Section Step	Table No.	Table Caption	Field No.	Field Caption
0	27	Item	1	No.
0	27	Item	3	Description
0	27	Item	18	Unit Price
0	27	Item	41	Gross Weight
0	27	Item	1217	GTIN
0	27	Item	5702	Item Category Code

Perfion Extension Import Setup (v.2025.07) [1000240 MSSQL | 0090288900]

Name: PerfionItemSync | Number: 1 | Page size: 100

```

<Query>
<Select languages='EN' />
<Feature id='ItemName' />
<Feature id='WeightKG' />
<Feature id='EANCode' />
<Feature id='SupplierRRP' />
<Feature id='relSAPGroupCode' />
</Select>
<From id='100' />
<Where>
<Clause id='Brand' operator='=' value='Normal' />
<Clause id='ApprovedSAP' operator='HAS' />
<Clause id='ModifiedDate' operator='>' value='[%LastImport]' />
</Where>
</Query>
    
```

Perfion Manual Import (v.2025.07) [1000240 MSSQL | 0090288900]

Import setup: PerfionItemSync

Buttons: OK, Import, Export

All remaining widgets on dashboard identical to ERP First

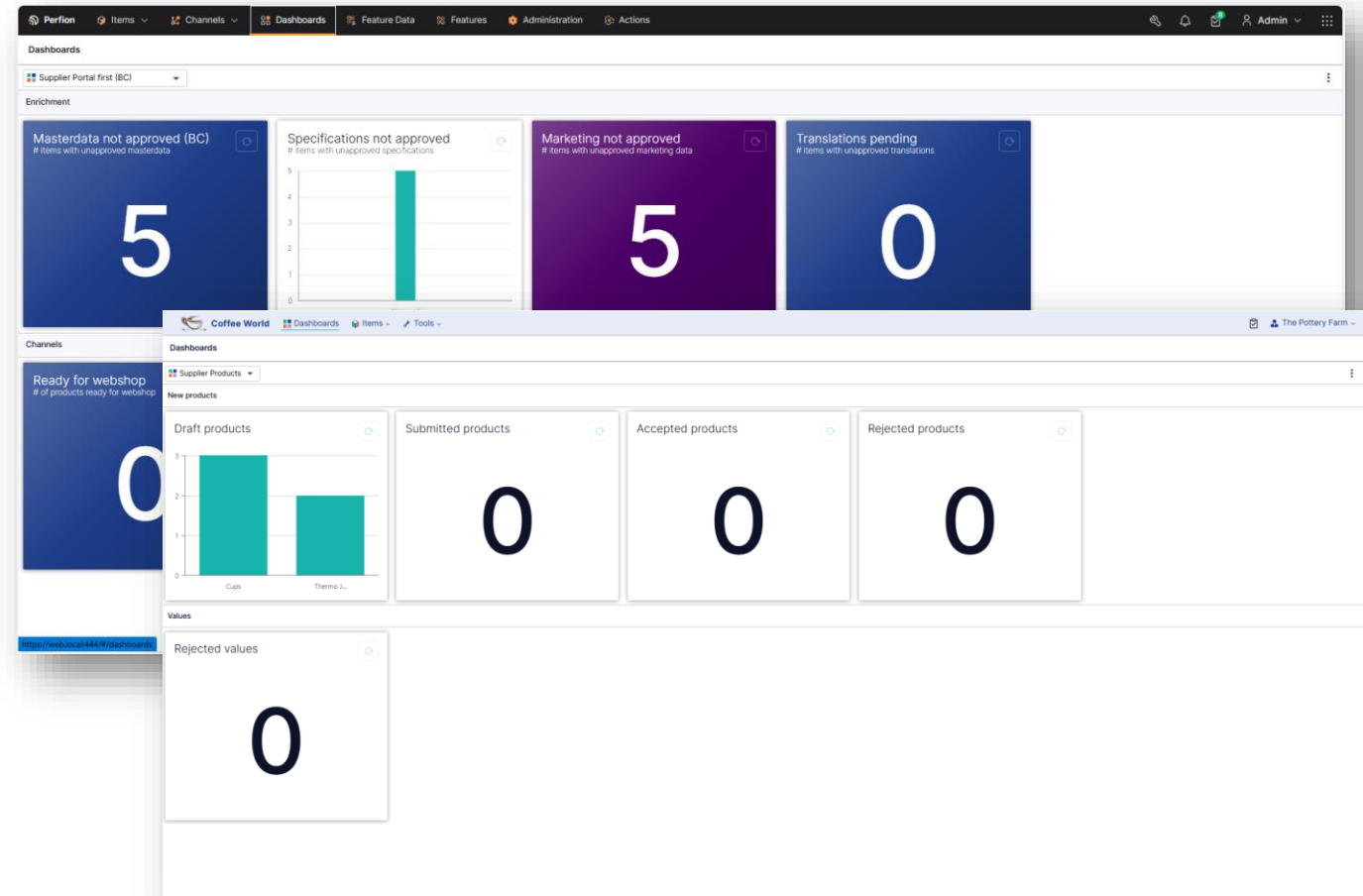
Process

Supplier Portal First



Supplier Portal First (BC/SAP)

- This process starts in the Supplier Portal
- Log in to supplier portal with:
 - **perfionsupplierEN2@boyum-it.com**
 - **PerfionDemo23**
- 5 items are pre-created
- Submit all 5 items and log out
- Log in to supplier portal with
 - **admin**
 - **kaffethe**
- Accept the 3 cups
- Reject the 2 coffee machines (to show reject-capability and to save time in rest of demo)
- Log out and go to Perfion



Masterdata

- Assign Category and refresh to see Packaging
- Approve for BC/SAP
- Switch to BC/SAP and run Release2ERP:
 - BC: 10 - PRODUCT
 - SAP: PerfionItemSync

Product	Main Image	Item Name	Item Type	Product Name	Supplier Code	EAN	Supplier RRP (€)	RRP BC (€)	Category	Primary packaging	Masterdata (%)	Approved for BC
100444431		Mood mug Blue	Variant	Mood Mug	9999	5706447103469	9.95				87%	<input type="checkbox"/>
100444432		Mood mug Green	Variant	Mood Mug	9999	5706447103476	9.95				87%	<input type="checkbox"/>
100444433		Mood mug Pink	Variant	Mood Mug	9999	5706447103483	9.95				87%	<input type="checkbox"/>
806281940		Coffee Knock Box Caramel	Variant	Coffee Knock Box	9999	078168677500	12.95				87%	<input type="checkbox"/>
806281973		Coffee Knock Box Green	Variant	Coffee Knock Box	9999	078168677494	12.95				87%	<input type="checkbox"/>

10-PRODUCT

Code: 10-PRODUCT | Last Run Date: 11/27/2025 2:44 PM

Connection Code: API | Record Root Node: //Data/Product

Section Step	Table No.	Table Caption	Field No.	Field Caption
0	27	Item	1	No.
0	27	Item	3	Description
0	27	Item	18	Unit Price
0	27	Item	41	Gross Weight
0	27	Item	1217	GTIN
0	27	Item	5702	Item Category Code

Perflon Extension Import Setup (v.2025.07) [1000240 MSSQL | 0090288900]

Name: PerfionItemSync | Number: 1 | Page size: 100

```
<Query>
<Select languages='EN' />
<Feature id='ItemName' />
<Feature id='WeightKG' />
<Feature id='EANCode' />
<Feature id='SupplierRRP' />
<Feature id='relSAPGroupCode' />
</Select>
<From id='100' />
<Where>
<Clause id='Brand' operator='=' value='Normal' />
<Clause id='ApprovedSAP' operator='HAS' />
<Clause id='ModifiedDate' operator='>' value='[%LastImport]' />
</Where>
</Query>
```

Perflon Manual Import (v.2025.07) [1000240 MSSQL | 0090288900]

Import setup: PerfionItemSync

OK Import

Specifications

- Group variants under new parent
- Assign Item Type = Product to parent
- Copy Product Name to base value of parent
- Select parent item and run context action
Product: Consolidate variant values
- Refresh to see how variant data has been consolidated at product level

The screenshot shows the Perfion Supplier Portal First (BC) dashboard. The main table displays product specifications for 'Mood mug' variants. The table has columns for Product, Main Image, Item Name, Item Type, Product Name, Supplier Code, Supplier Portal, Material, Diameter (cm), Volume (l), Brand, Color, and Specifications OK. The 'Specifications OK' column contains toggle switches for each row.

Product	Main Image	Item Name	Item Type	Product Name	Supplier Code	Supplier Portal	Material	Diameter (cm)	Volume (l)	Brand	Color	Specifications OK
Mood mug			Product	Mood mug								<input type="checkbox"/>
100444431		Mood mug Blue	Variant	Mood mug	9999	Yes	Ceramics	9.4	0.4	Scandi Living	Blue	<input type="checkbox"/>
100444432		Mood mug Green	Variant	Mood mug	9999	Yes	Ceramics	9.4	0.4	Scandi Living	Green	<input type="checkbox"/>
100444433		Mood mug Pink	Variant	Mood mug	9999	Yes	Ceramics	9.4	0.4	Scandi Living	Pink	<input type="checkbox"/>

On the left side of the dashboard, there is an 'Enrichment' section with a bar chart titled 'Specifications not approved'. The chart shows two bars: 'Cups' with a value of 4 and 'Thermo J...' with a value of 3. Below the chart, it says '8 items with unapproved specifications'.

All remaining widgets on dashboard identical to ERP First



Extra Options

Content Store

- Use at the end of each process workflow at your discretion
- Dashboard is auto-populated with products, images and datasheets created during process
- For each Widget:
 - Fill in missing data
 - Approve/Unapprove) via 3-state Boolean
- In Windows Client, run scheduled task **Content Store – Rebuild**
- Go to Content Store and show new products, images and/or files.

The image shows two screenshots of the Perion Content Store interface. The top screenshot displays a dashboard with three widgets: 'Products ready for Content Store' (7), 'Images ready for Content Store' (5), and 'Files ready for Content Store' (5). The bottom screenshot shows the 'Content Store' table with columns for Product, Item Name, Content Store Title, Main Image, Brand, Content Store Category, and Publish in Content Store. A table of scheduled actions is also visible, including 'Content Store - Rebuild', 'Import images from hoefolder', and 'Update reports'. A log window at the bottom right shows the execution details of the 'Content Store - Rebuild' task, indicating it completed successfully in 4 seconds.

Product	Item Name	Content Store Title	Main Image	Brand	Content Store Category	Publish in Content Store
Mood mug				Scandi Living		<input type="checkbox"/>
100444431	Mood mug Blue	100444431 - Mood mug Blue		Scandi Living		<input type="checkbox"/>
100444432	Mood mug Green					<input type="checkbox"/>
100444433	Mood mug Pink					<input type="checkbox"/>
9945T	Vacuum Jug EM77 Dark Blue					<input type="checkbox"/>
9955T	Vacuum Jug EM77 Moss Green					<input type="checkbox"/>

Name	Status	Name	Schedule	Action	Next run	Last result	Last run time	Last run du...	Modified by
All Scheduled Tasks	Ready	Content Store - Rebuild	Disabled	Synchronize data to Content Stores	None	Success	2025-11-13 13:34:22	4 seconds	Admin
	Ready	Import images from hoefolder	Disabled	Execute Action with id 2590	None	Success	2025-10-02 20:23:26	41 seconds	Admin
	Ready	Import products from hoefolder	Disabled	Execute Action with id 5522	None	Success	2025-10-02 10:22:43	1 second	Admin
	Ready	Update reports	Disabled	Execute Action with id 9330	None	Success	2025-01-17 14:54:01	1 second	Admin

Log

Timestamp	Level	Message
Yesterday at 13:34:2	Info	Task completed successfully in 4 seconds.
Yesterday at 13:34:2	Info	Synchronization for content stores is complete
Yesterday at 13:34:2	Info	No files found to synchronize
Yesterday at 13:34:2	Info	Found 632 existing files
Yesterday at 13:34:2	Info	Loading binary metadata for 195 binaries
Yesterday at 13:34:2	Info	Synchronizing binaries
Yesterday at 13:34:2	Info	Coffee World - successfully synchronized items for content store
Yesterday at 13:34:2	Info	Coffee World - synchronizing 7 items - (Create 0, Update 2, Remove 0)

Digital Product Passport

- Category: Thermo Jugs
- View: Digital Product Passport (DPP)
- This is DPP data at product level
 - Show DPP Preview Link
- Click Batch No
- This is DPP data at batch level
 - Show DPP Preview Link
- Process can be repeated for Coffee Machines
- This also includes Components

Category	Product	Main Image	Item Name	DPP Type	DPP Description	Material 1	Material 2	CO2 Emission Estimate (kg/unit)	Recycling Instructions	DPP Preview Link	Batch No
	STELTON EM77			Non-electrical	Introducing the STELTON EM77, a stunning thermo ju...	Plastic	Glass	1.5 - 2.1	* Separate inner glass from outer casing * Recycle inner glass as glass ...	http://webkit.local/Perflon/Report.aspx?id=2123&reportid=28	
	958ST		Vacuum Jug EM77 Purple	Non-electrical	Introducing the STELTON EM77, a stunning thermo ju...	Plastic	Glass	1.5 - 2.1	* Separate inner glass from outer casing * Recycle inner glass as glass ...	http://webkit.local/Perflon/Report.aspx?id=2123&reportid=28	
	973ST		Vacuum Jug EM77 Milano Sand	Non-electrical	Introducing the STELTON EM77, a stunning thermo ju...	Plastic	Glass	1.5 - 2.1	* Separate inner glass from outer casing * Recycle inner glass as glass ...	http://webkit.local/Perflon/Report.aspx?id=2123&reportid=28	Batch No
	978ST		Vacuum Jug EM77 Chalk	Non-electrical	Introducing the STELTON EM77, a stunning thermo ju...	Plastic	Glass	1.5 - 2.1	* Separate inner glass from outer casing * Recycle inner glass as glass ...	http://webkit.local/Perflon/Report.aspx?id=2124&reportid=28	
	980ST		Vacuum Jug EM77 Olive	Non-electrical	Introducing the STELTON EM77, a stunning thermo ju...	Plastic	Glass	1.5 - 2.1	* Separate inner glass from outer casing * Recycle inner glass as glass ...	http://webkit.local/Perflon/Report.aspx?id=2125&reportid=28	
	982ST		Vacuum Jug EM77 Red	Non-electrical	Introducing the STELTON EM77, a stunning thermo ju...	Plastic	Glass	1.5 - 2.1	* Separate inner glass from outer casing * Recycle inner glass as glass ...	http://webkit.local/Perflon/Report.aspx?id=2126&reportid=28	Batch No
	983ST		Vacuum Jug EM77 Yellow	Non-electrical	Introducing the STELTON EM77, a stunning thermo ju...	Plastic	Glass	1.5 - 2.1	* Separate inner glass from outer casing * Recycle inner glass as glass ...	http://webkit.local/Perflon/Report.aspx?id=2127&reportid=28	
	985ST		Vacuum Jug EM77 Cloud	Non-electrical	Introducing the STELTON EM77, a stunning thermo ju...	Plastic	Glass	1.5 - 2.1	* Separate inner glass from outer casing * Recycle inner glass as glass ...	http://webkit.local/Perflon/Report.aspx?id=2128&reportid=28	
	986ST		Vacuum Jug EM77 Ocean	Non-electrical	Introducing the STELTON EM77, a stunning thermo ju...	Plastic	Glass	1.5 - 2.1	* Separate inner glass from outer casing * Recycle inner glass as glass ...	http://webkit.local/Perflon/Report.aspx?id=2129&reportid=28	

Batch No - 973ST						
Batch No	Production Date	Location	Child Labour Risk	Material 1	Material 1 Sourcing	Material 2
973ST-0001	01/05/2025	France	Low	Plastic	EU recycled	Glass
973ST-0002	03/05/2025	France	Low	Plastic	EU recycled	Glass
973ST-0003	05/05/2025	France	Low	Plastic	EU recycled	Glass
973ST-0004	26/05/2025	India	Medium	Plastic	APAC recycled	Glass

Vacuum Jug EM77 Purple

Introducing the STELTON EM77, a stunning thermo jug that combines timeless design with exceptional functionality. Crafted by the renowned brand Stelton, this jug is perfect for keeping your beverages hot or cold for hours, making it an essential addition to any kitchen or dining table. Its sleek silhouette and minimalist aesthetic make it not only a practical choice but also a stylish statement piece.

Volume 1 l
Color Purple
Material 1 Plastic
Material 2 Glass
CO2 Emission Estimate 1.5 - 2.1 kg/unit

Recycling Instructions
 • Separate inner glass from outer casing
 Recycle inner glass as

stelton

Promotional Items

- Section: Promotional Items
- Category (“Base Product”): BODUM CANTEEN
- View: Variants (custom view)
- Create a copy of existing virtual item (do not include child items)
- Rename to 10000B-003
- Select Customer, Variant Colors and Variant Sizes
- Run context action Create Color/Size variants
- Show variants and how they are linked to correct base product
- Select all new child items and run context action Add BOM to Variants
- Refresh and show BOM
- Release to BC/SAP

Base Product	Promotional Item	Customer	Customer Name	Logo	Variant Color(s)	Variant Size(s)	Resource	Resource Qty (hours)	Base Variant	Variant Name	Variant Image	Bill Of Materials	Approved for
Untagged	10000B-001	45979797	Lauritzen Kontormøbler A/S		Green Purple	0.2 L 0.35 L	Logo Print Machine	0.1					
Claps	10000B-002	61000	Fairway Sound		Black Gray Red	0.35 L	Logo Print Machine	0.1					
BODUM BISTRO													
BODUM CANTEEN													
STAUB MUG	10000B-002-BLK-035L	61000	Fairway Sound		Black	0.35 L	Logo Print Machine	0.1	10115B	Bodum Canteen 0.35 Black		Bill Of Materials	
Thermo Jugs	10000B-002-GRY-035L	61000	Fairway Sound		Gray	0.35 L	Logo Print Machine	0.1	10114B	Bodum Canteen 0.35 Grey		Bill Of Materials	
STELTON EM77	10000B-002-RED-035L	61000	Fairway Sound		Red	0.35 L	Logo Print Machine	0.1	10116B	Bodum Canteen 0.35 Red		Bill Of Materials	

Good Luck!

