Perfion

Perfion Demo

2026-R1-SR2

Contact



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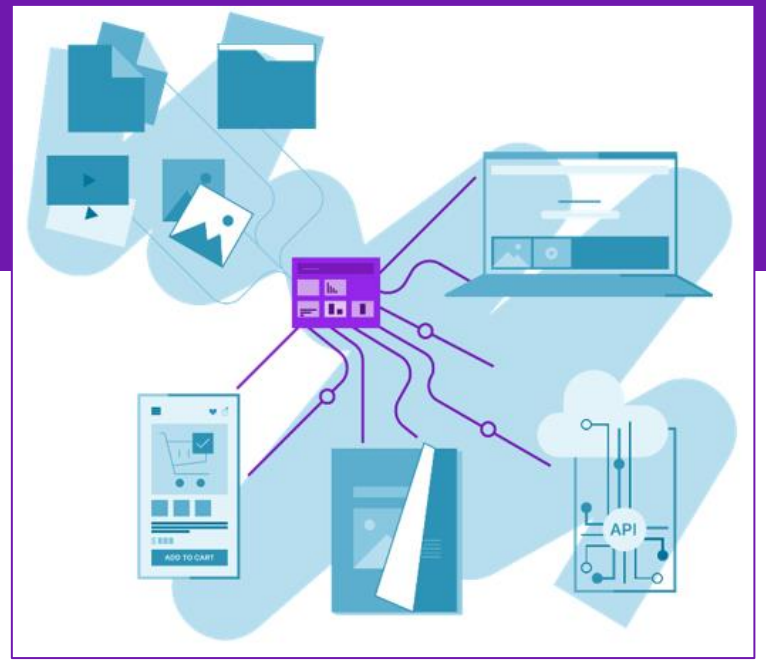
jegj@boyum-it.com

What’s new

- New **Digital Product Passport** demo capabilities including a Claude-built DPP web-solution
- New **Demo Webshop** which can serve as a simpler alternative to the Shopify demo webshop
- Some select **process changes/simplifications**
- **More coffee machines** (three items seemed a bit poor)
- Everything in **Portuguese**

Perfion Basics

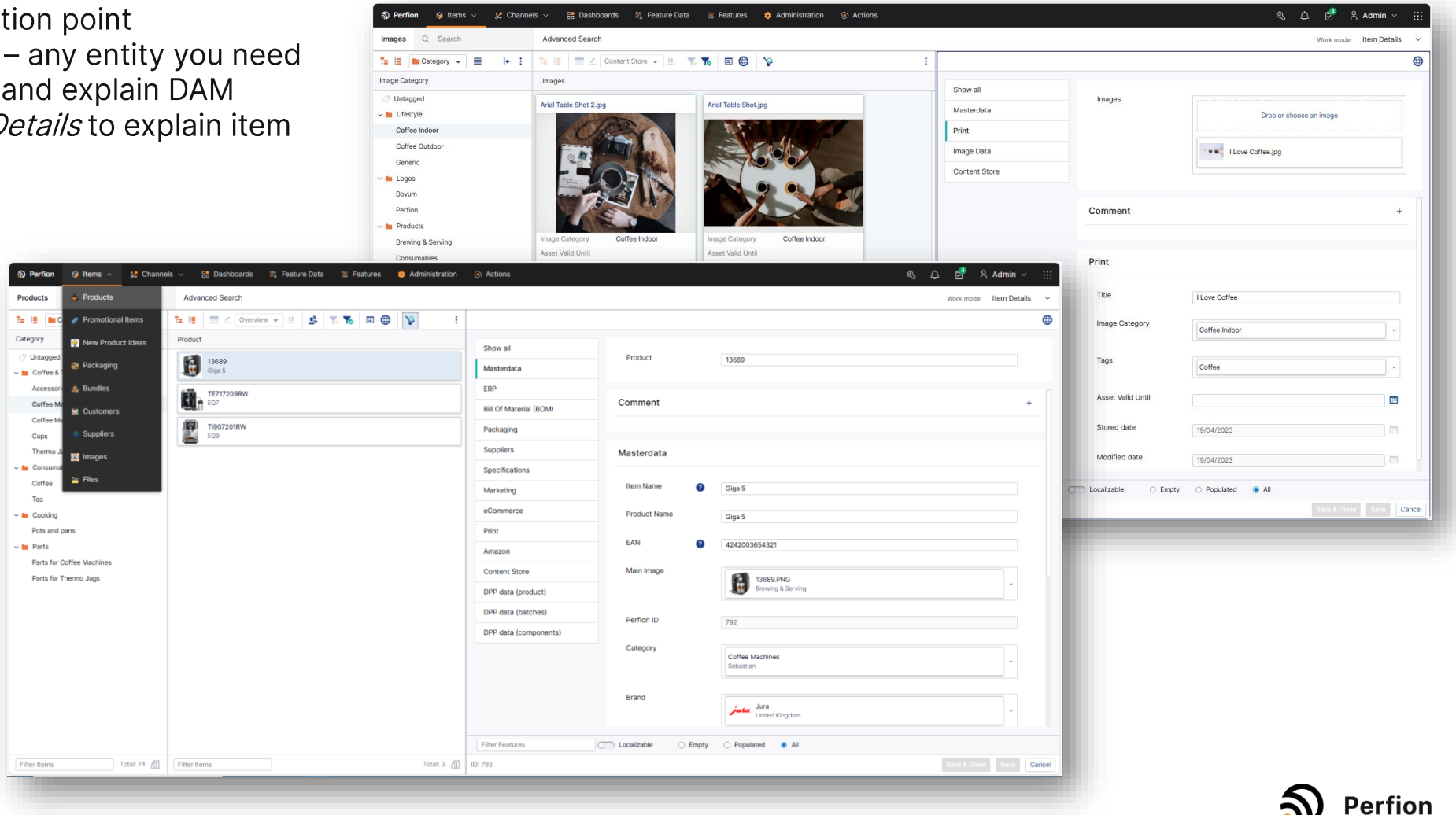
Things to show at the beginning of a demo



Perfion

PIM, DAM and all related entities

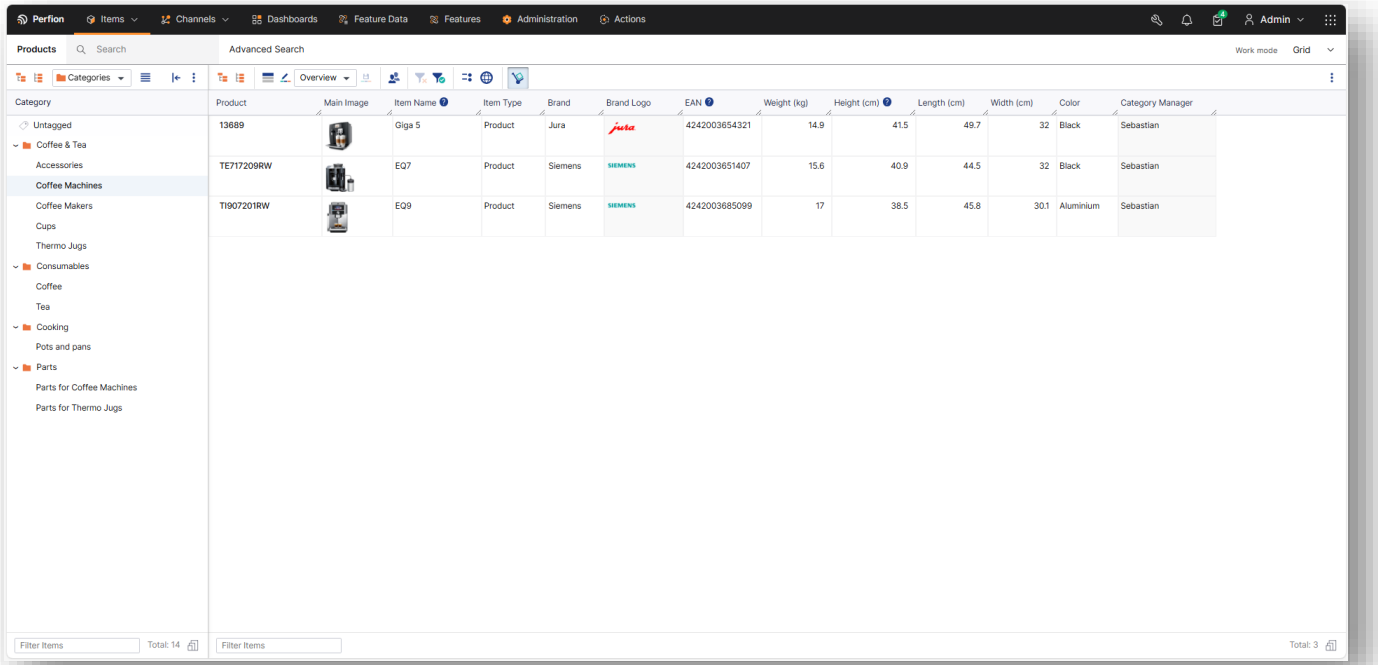
- Show *Items* as main navigation point
- Explain flexible data model – any entity you need
- Take a tour around images and explain DAM
- Use *Card* layout and *Item Details* to explain item centric data management



Perfion

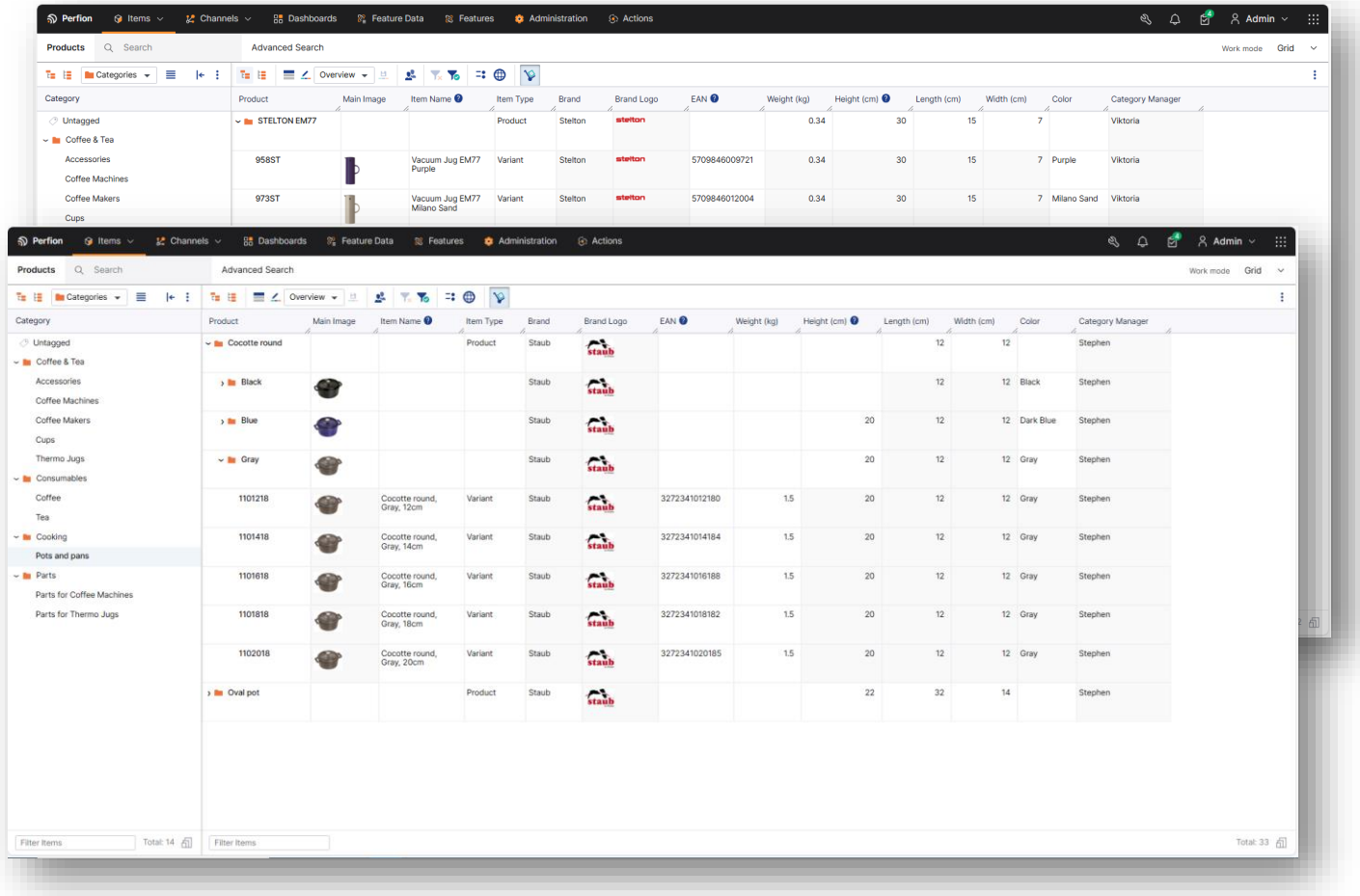
Grid

- 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*



Hierarchies and Inheritance

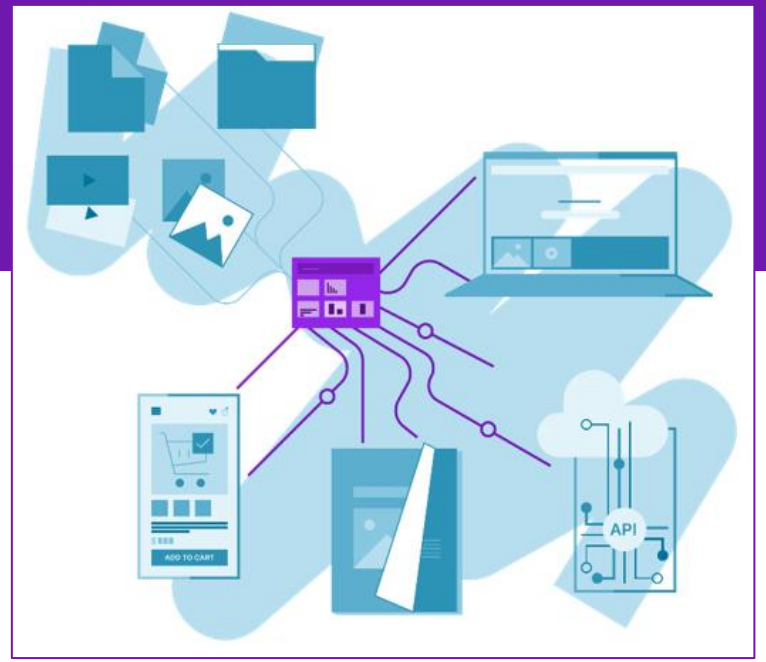
- Switch to *Thermo Jugs* and showcase traditional product-variant hierarchy and inheritance
- Switch to *Pots and Pans* and showcase multi-level hierarchies and inheritance



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Quality

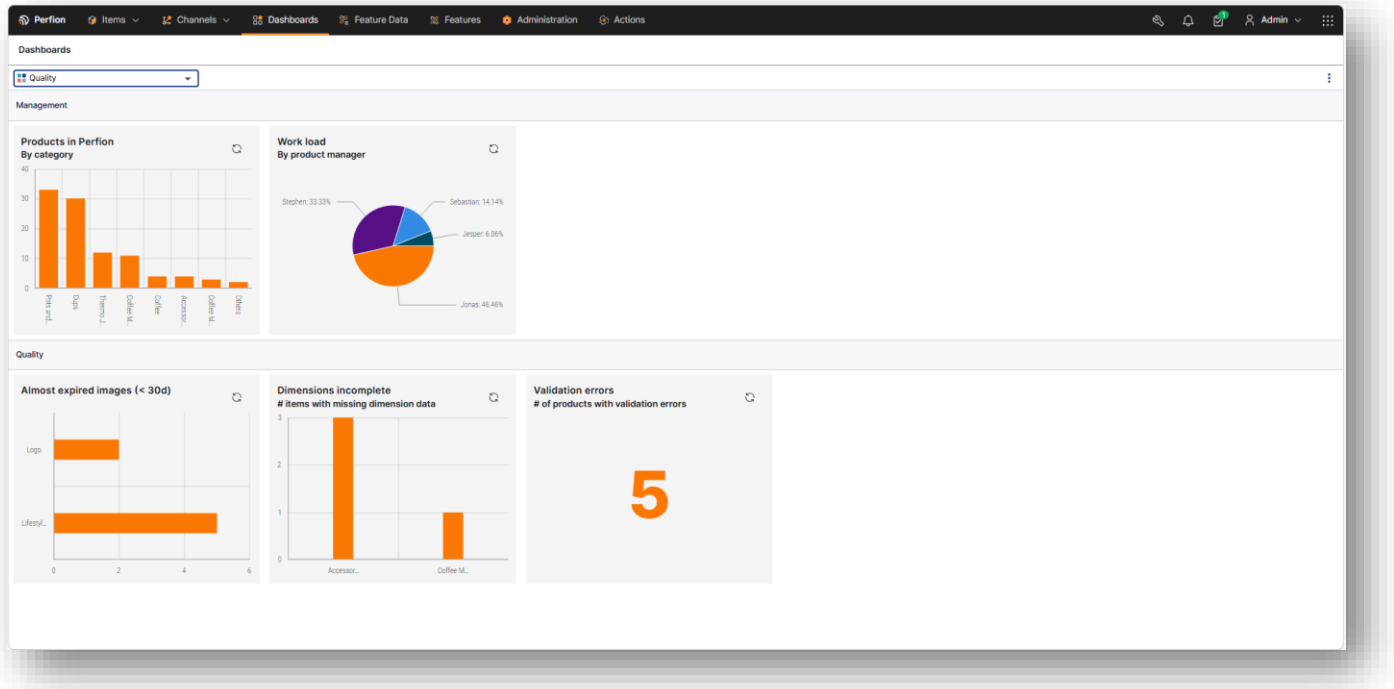
Show how Perfion can ensure high data quality



Perfion

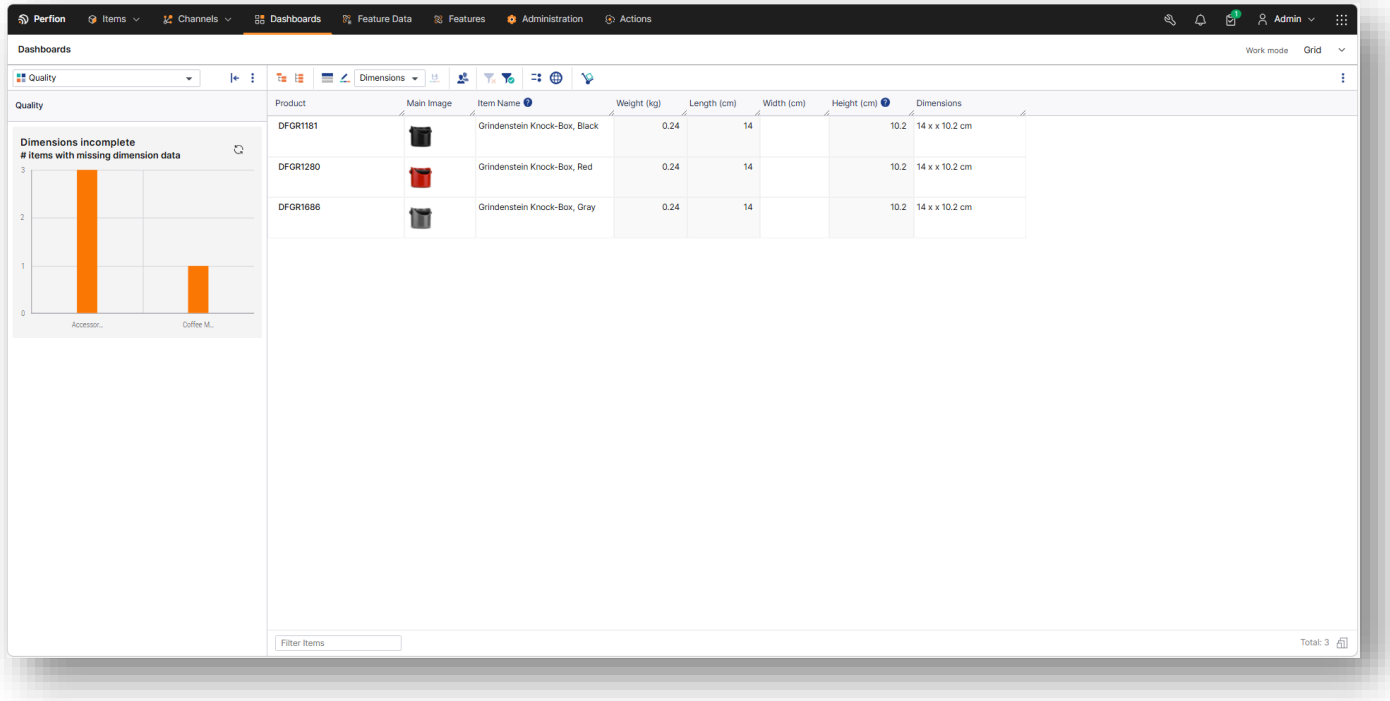
Quality

- Go to Quality dashboard
- Explain how quality relates to:
  - Data completeness
  - Data validity



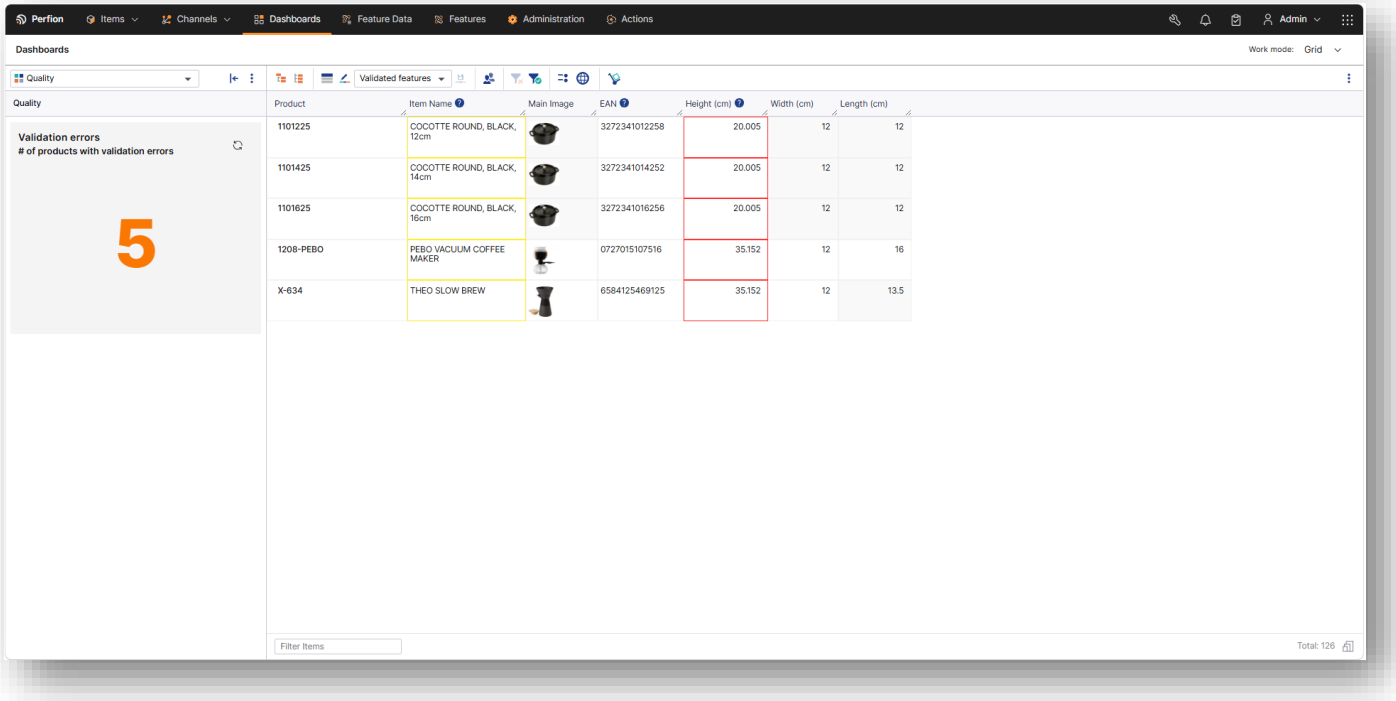
Data completeness

- Use widget *Dimensions incomplete*
- Fill in the blanks
  - Activate *Show Family* and enrich parent if focus is on hierarchies
- Potentially highlight how *Dimensions* is auto-populated via a formula



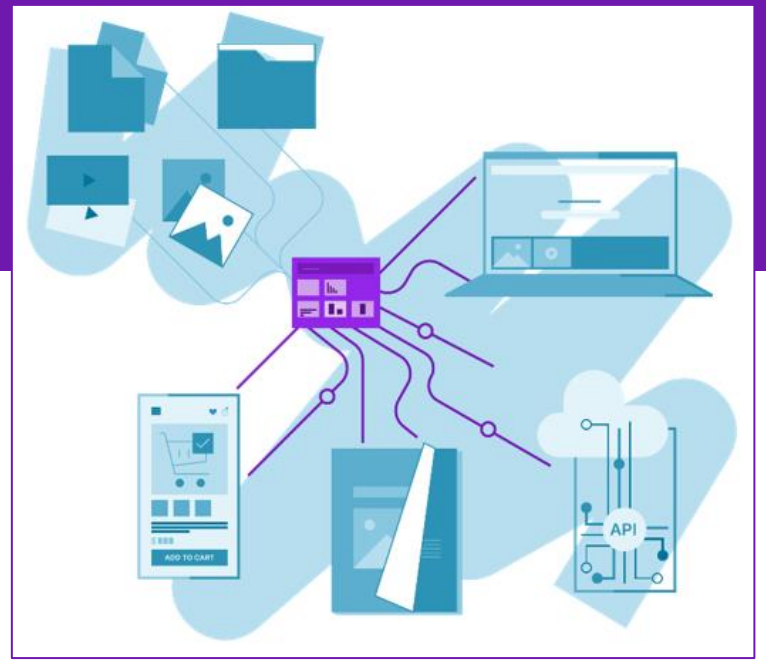
Data validity

- Use widget *Validation errors*
- Hover the ?-icons to show why cells are colored
- Select the yellow cell 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



Process

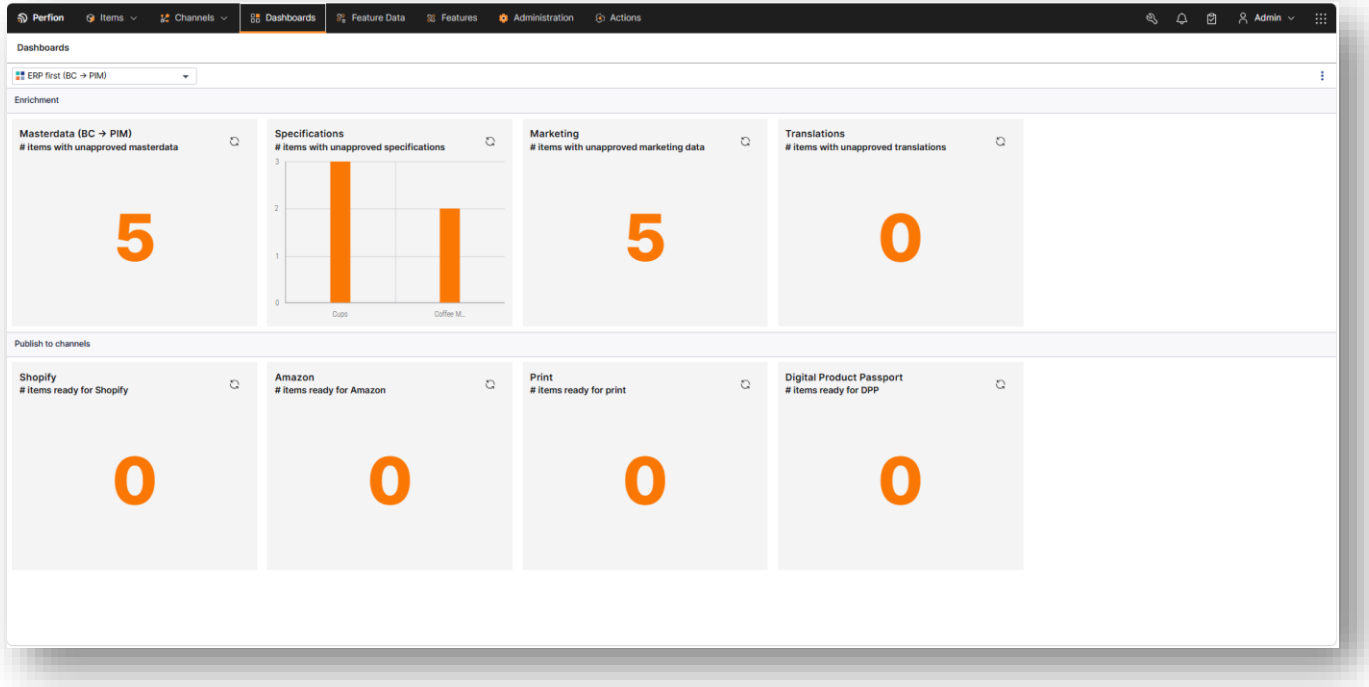
ERP First



Perfion

ERP First (BC/SAP)

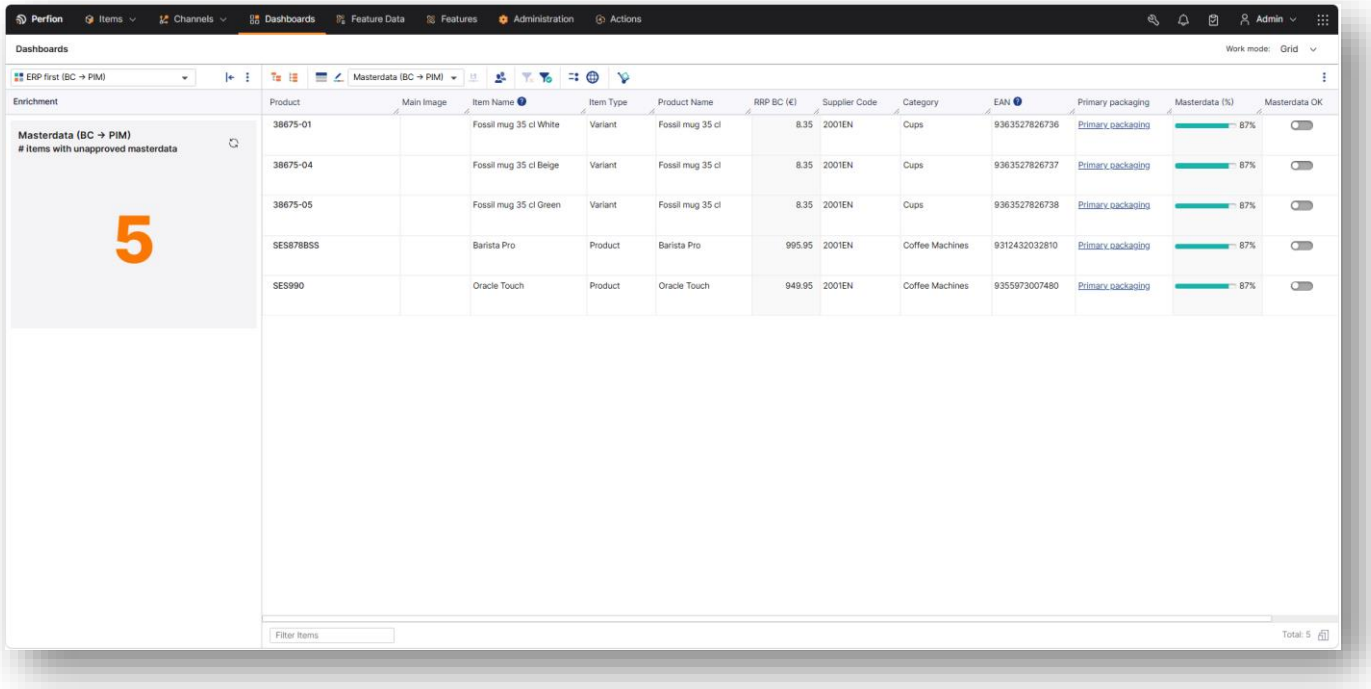
- Select relevant dashboard:
  - ERP First (BC → PIM)
  - ERP First (SAP → PIM)
- Explain the nature of the dashboard
  - Top row is mandatory enrichment
  - Bottom row is channel syndication
- Run one of the Sync actions:
  - Sync products from BC to Perfion
  - Sync products from SAP to Perfion
- Refresh dashboard to show 5 new items



Perfion

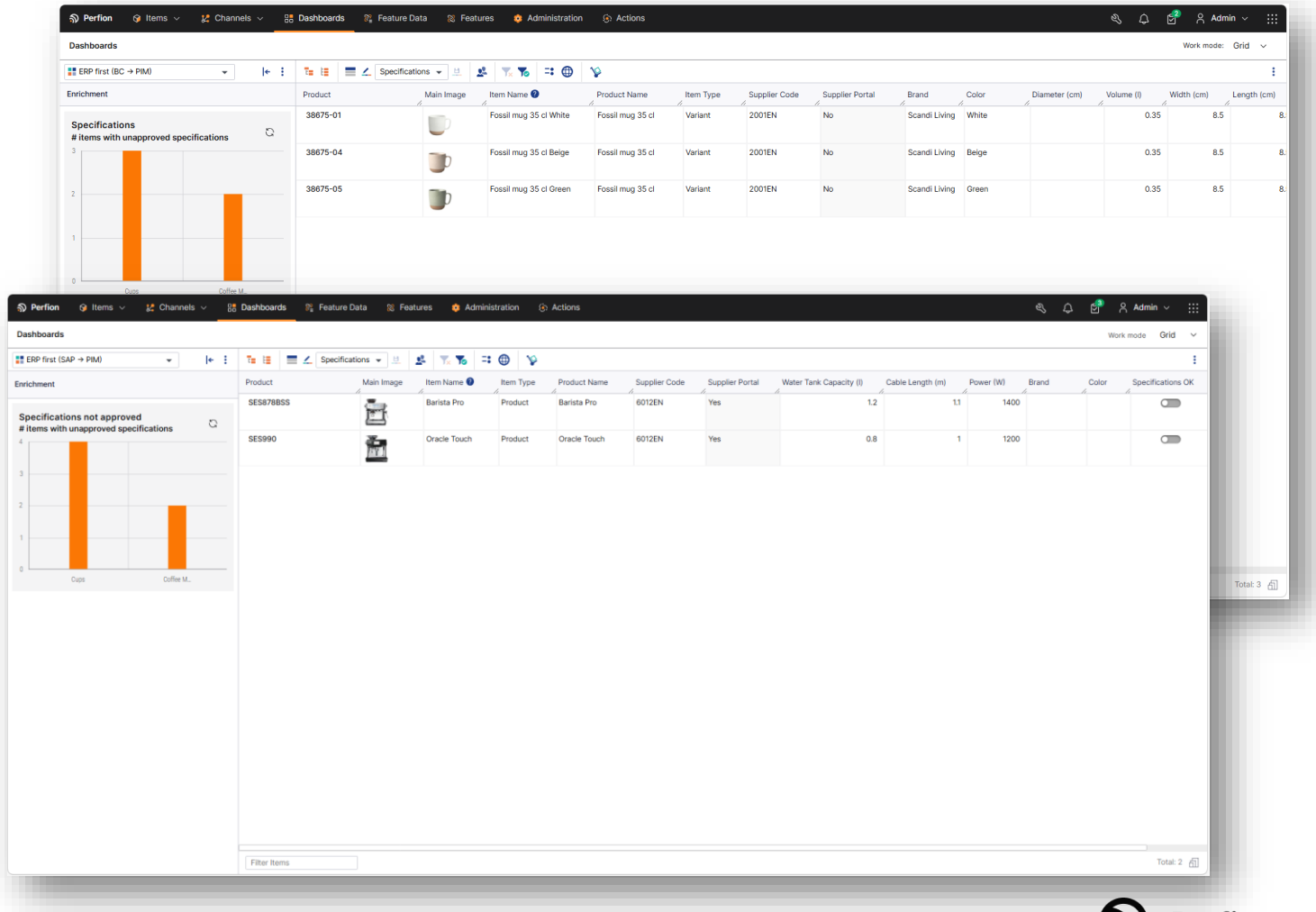
Masterdata

- Explain how 5 new items in ERP are created as 5 new items in PIM
- Explain ERP ownership of RRP and other transactional data (read-only in Perfion)
- Load images via context action
- Show Primary packaging
    - Pre-populated with template data based on category



Specifications

- Cups:
  - Diameter is missing → complete this
  - Explain material composition and mention the importance of this related to DPP
- Coffee Machines:
  - Brand is missing → complete this (SAGE)
  - Explain Item Dependency

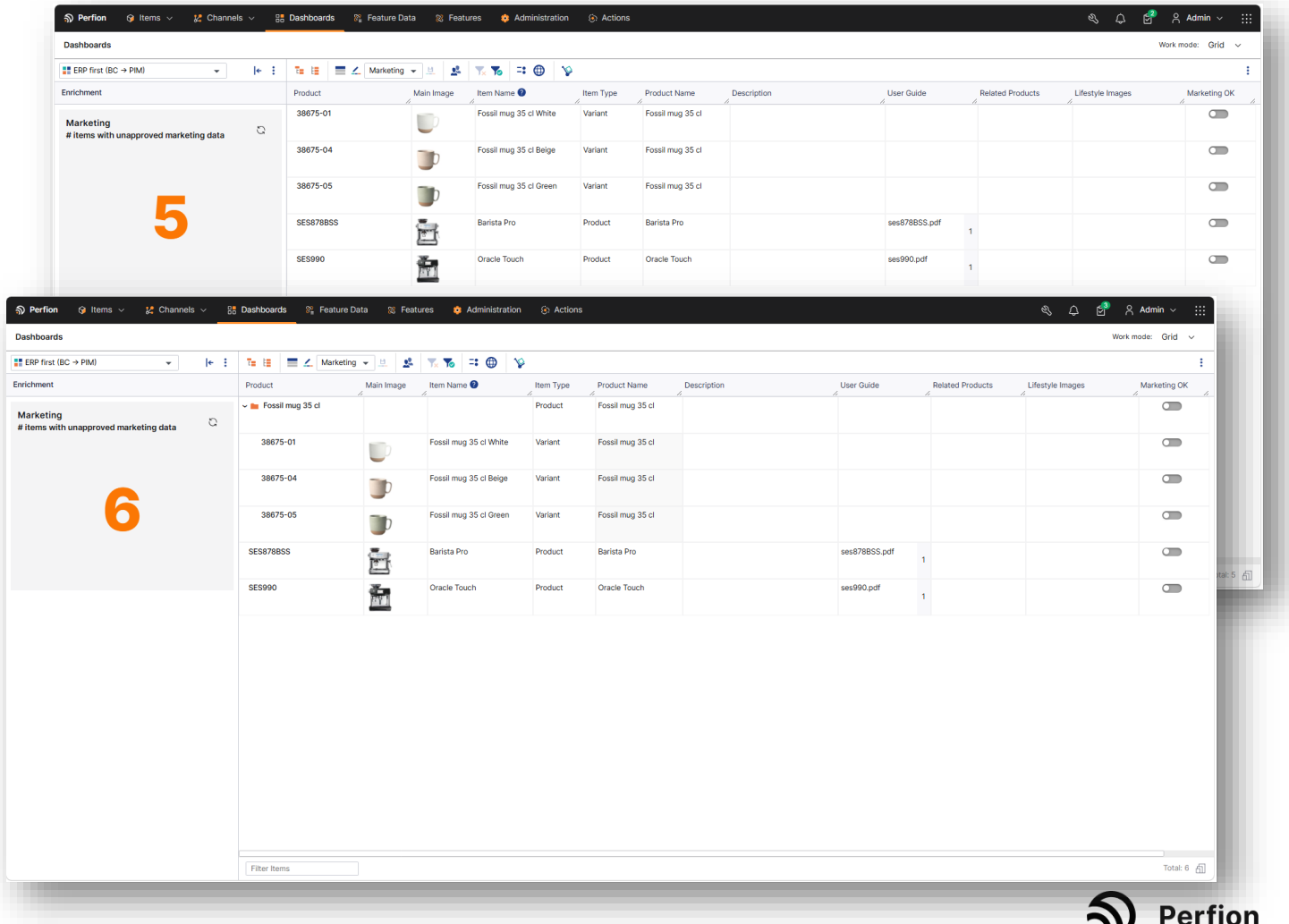


Perfion

Marketing

- Explain how marketing likes to work at product level
- Select the 3 cups and execute context action
  - **03 – Variants: Group variants under virtual product**
- While it runs, explain that it creates a new parent product and consolidates all shared values at product level
- Refresh grid to show result (6 items)

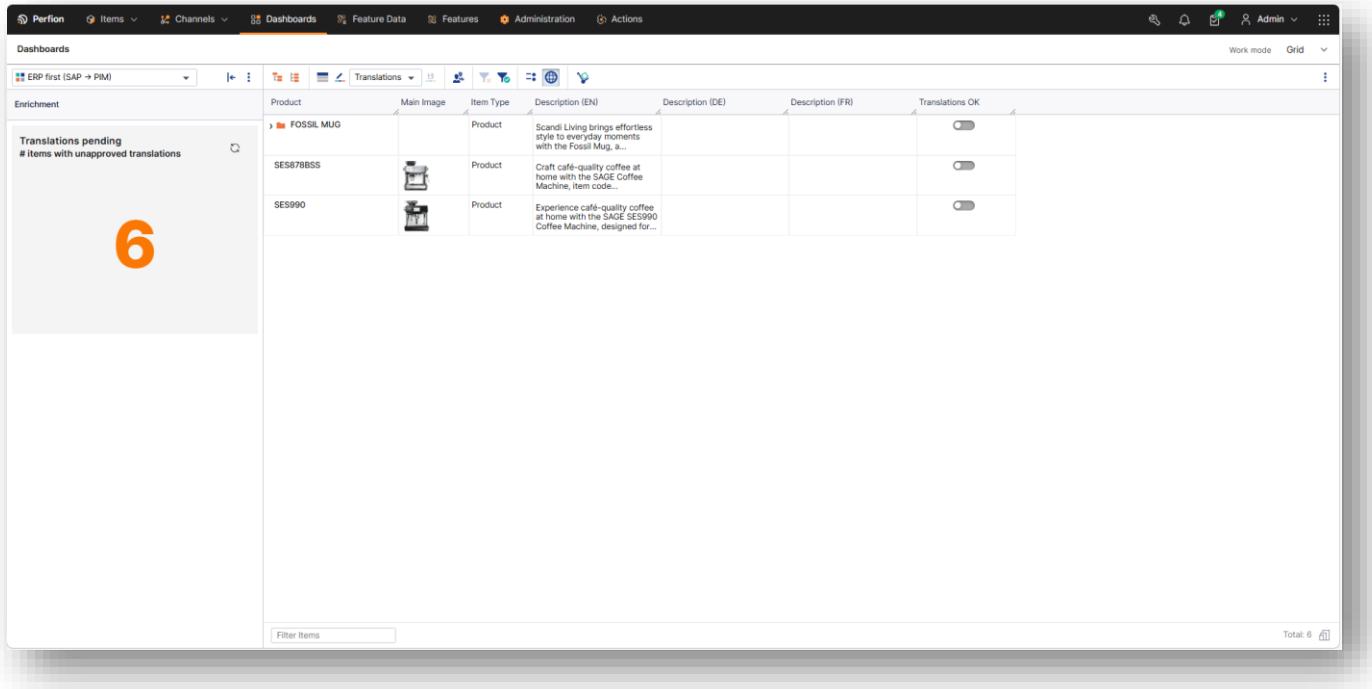
- Add description for first product via context option Create with AI
  - Use Cups template
- Add descriptions for both coffee machines “in bulk” via context option AI Apply Template
  - Use Coffee Machines template



Perfion

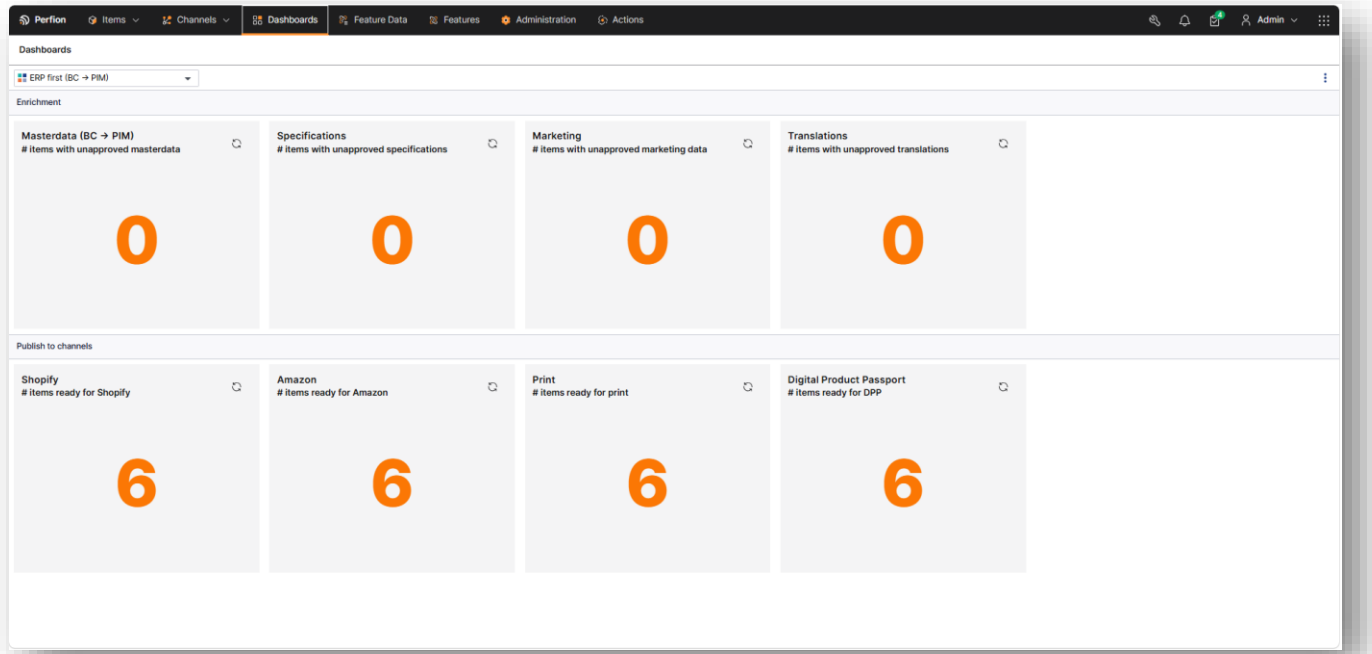
Translations

- 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



Channel syndication

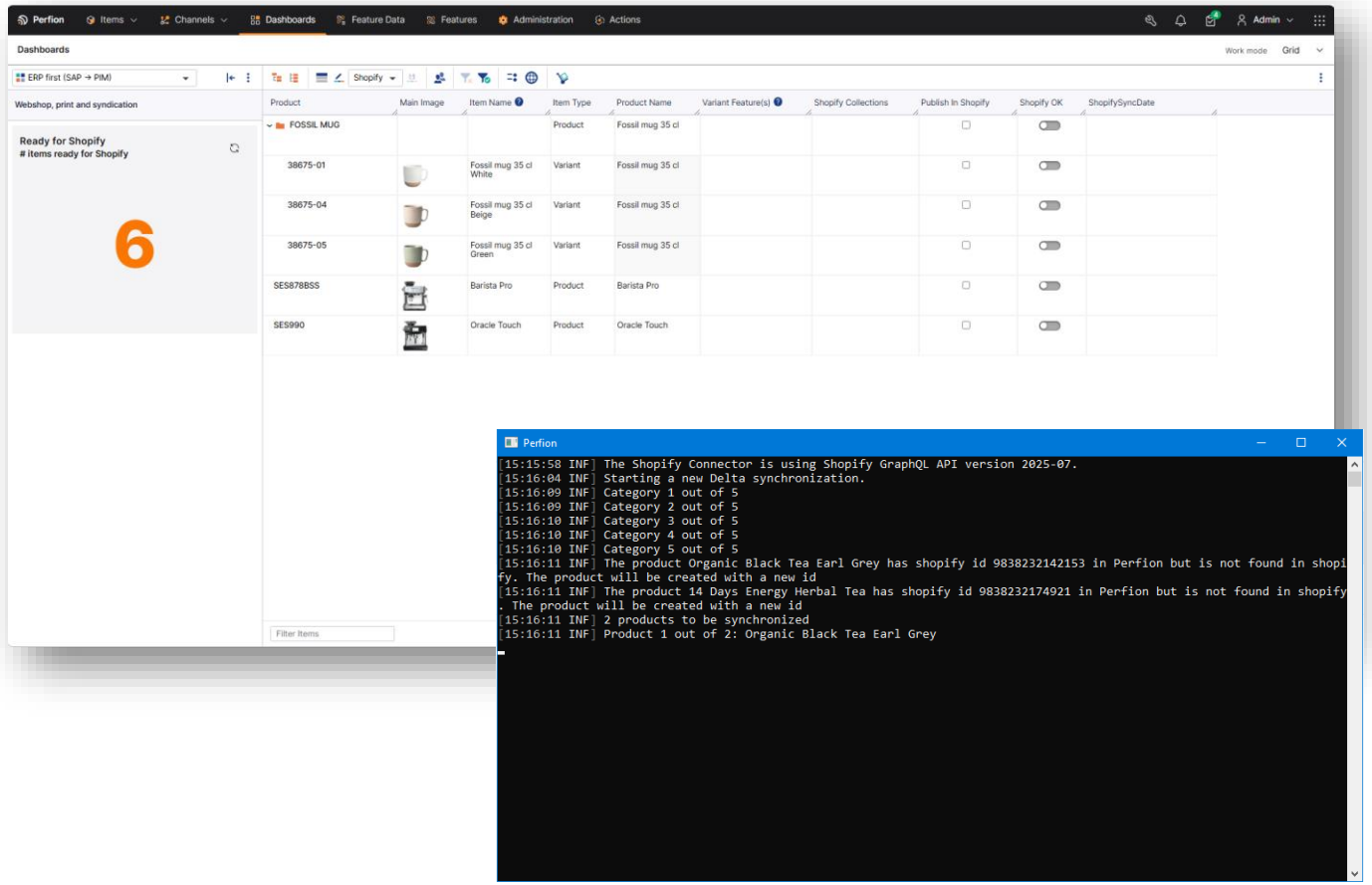
- Explain how dashboard now indicates that products are fully enriched and approved and ready for channel syndication



Perfion

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

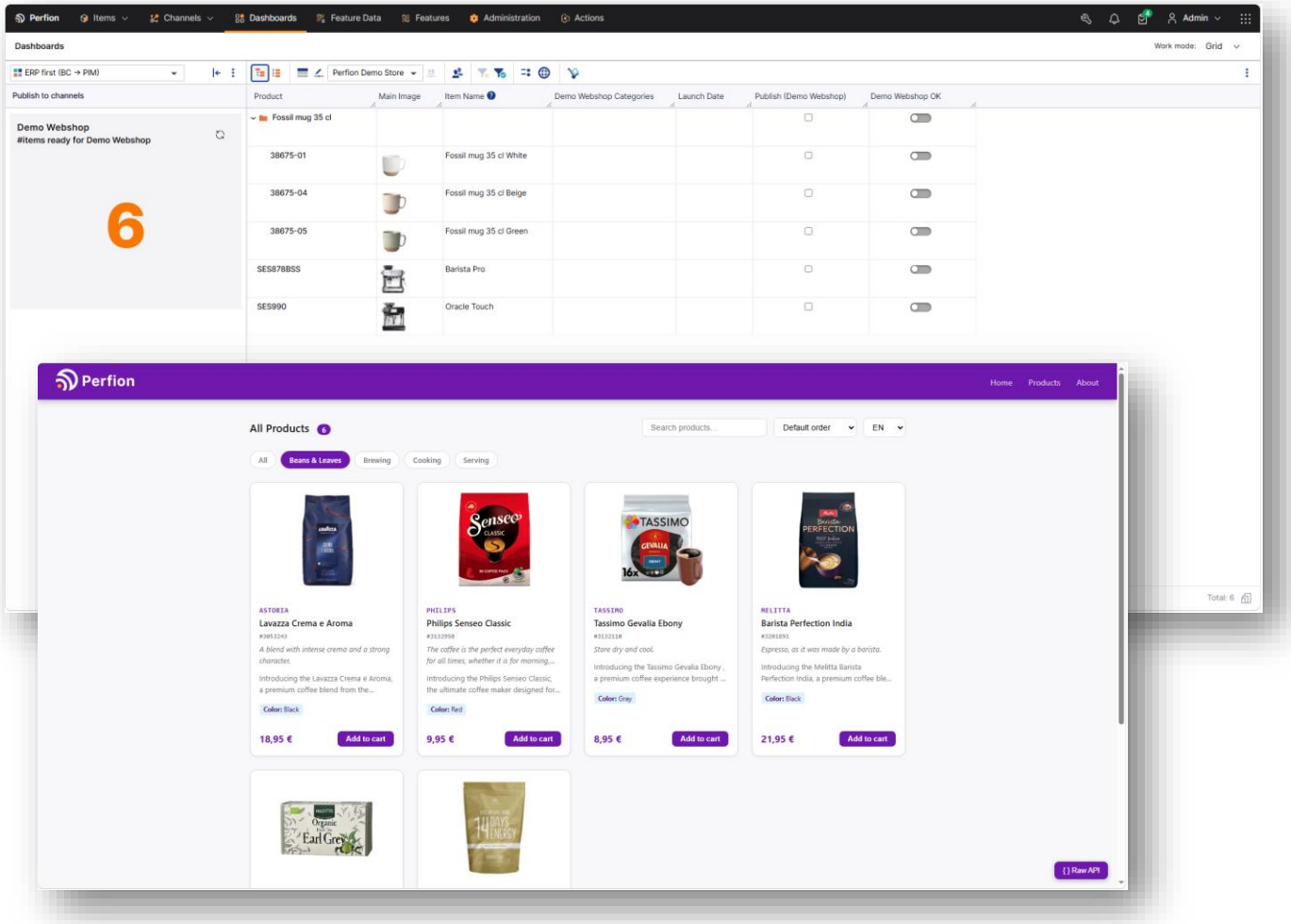


After restore of demo database, run Shopify connector again to reset Shopify.

Demo Webshop (alternative to Shopify)

NOTE: Replace **Shopify widget** on dashboard with **Demo Webshop widget** prior to demo

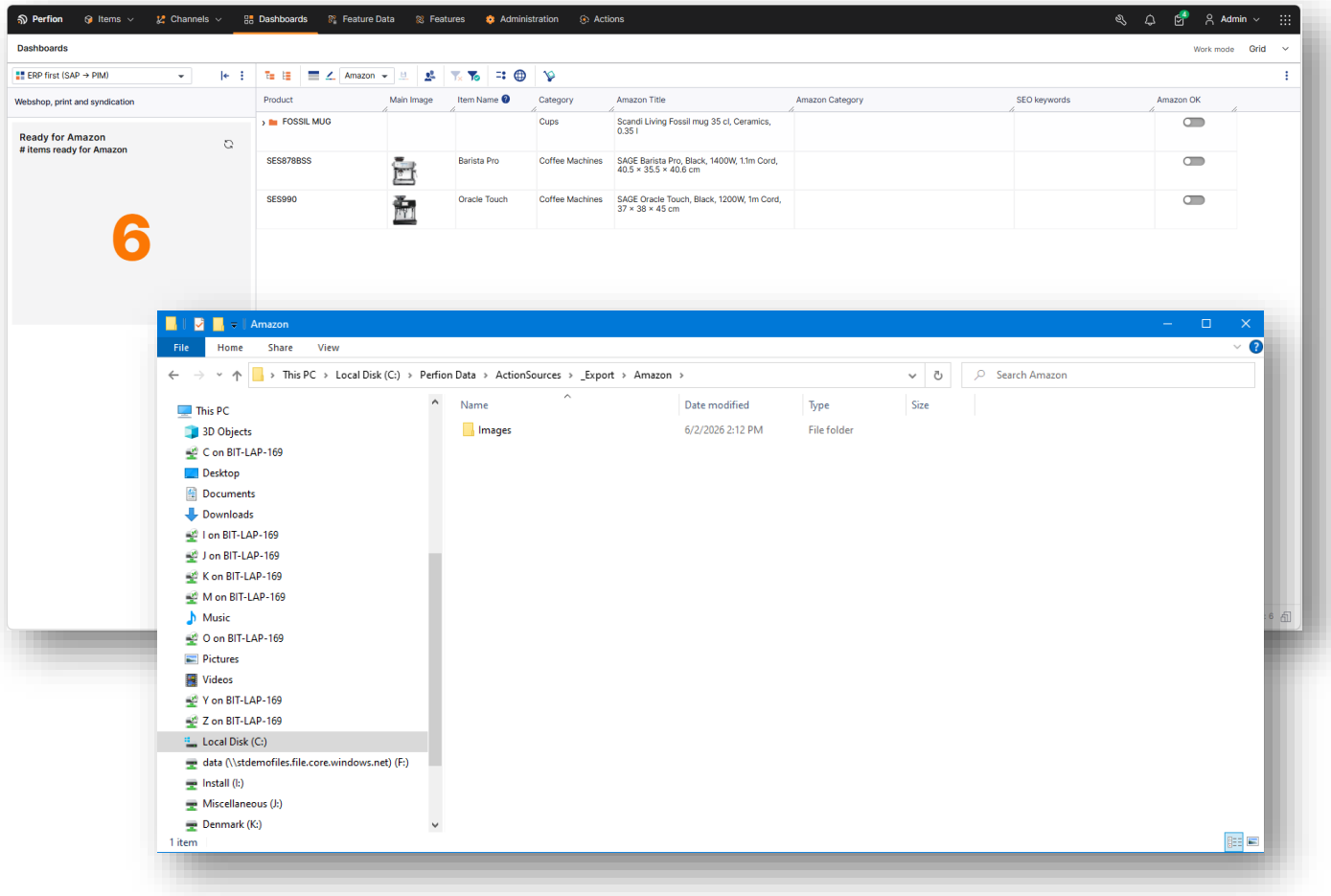
- Add Demo Webshop Categories
- Check all 6 items in Publish (Demo Webshop)
- Reload Demo Webshop to show result



Data is pulled live via API so no need to reset after demo

Amazon

- Run Amazon context action at product level
- Approve with Amazon OK
- An Amazon data file and all images are now output to:
  - C:\Perfion Data\ActionSources_Export\Amazon



Perfion

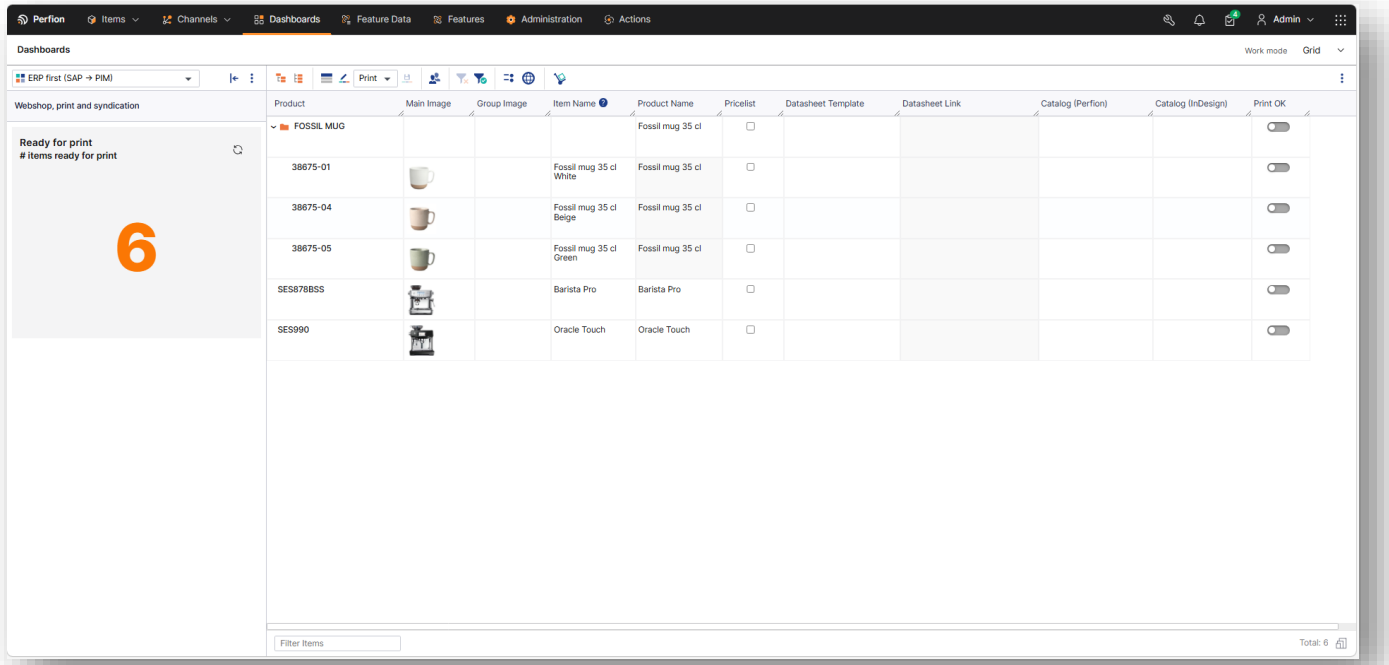
Print

Pricelists
- Pricelist can be checked for all 6 items
- Pricelist-files are output to:
  - C:\Perfion Data\ActionSources_Export\Pricelists

Datasheets
- Apply Datasheet Template to all 6 items:
  - Parent cup: Style Datasheet (1 page)
  - Variant cups: SKU Datasheet (1 page)
  - Coffee machines: SKU Datasheet (2 pages)
- Show aut-generated datasheets via links

Catalog (Perfion)
- Switch to work mode = Publish
- Select channel Catalog
  - Drag parent cup to Cups & Jugs
  - Drag coffee machines to Coffee Machines
- Publish Main Catalog in preferred language

Catalog (Indesign)
- Stay in Publish work mode
- Select channel Indesign
- Drag products to relevant section
- Go to InDesign and paginate catalog



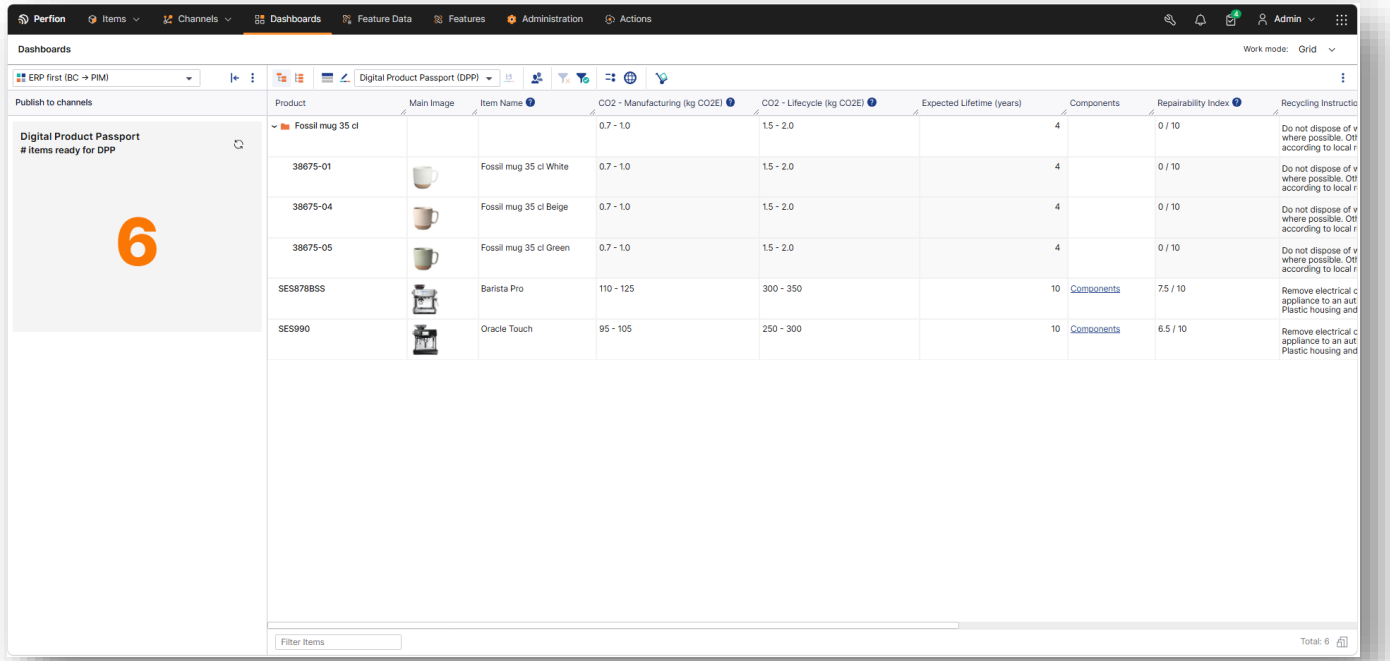
ERP First

Digital Product Passport – General

Definition
- Digital Product Passport (DPP) is a digital record of a product's lifecycle data.

Purpose
- Promote sustainability, circular economy, transparency, and regulatory compliance.

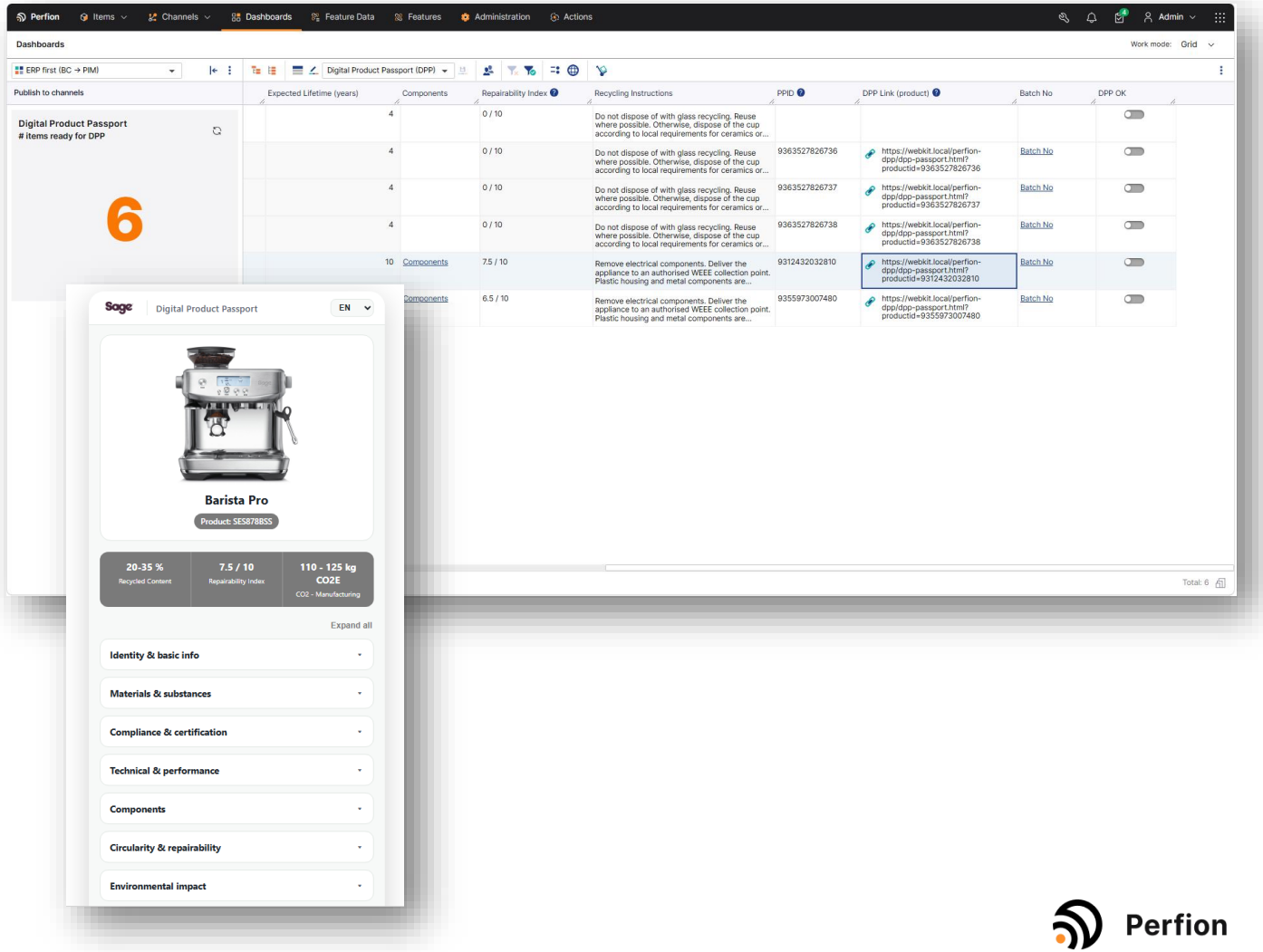
Data
- Product level: Pre-purchase transparency
- Batch level: Unit specific environmental impact
- S/N level: Lifecycle events



Perfion

Digital Product Passport – Product level

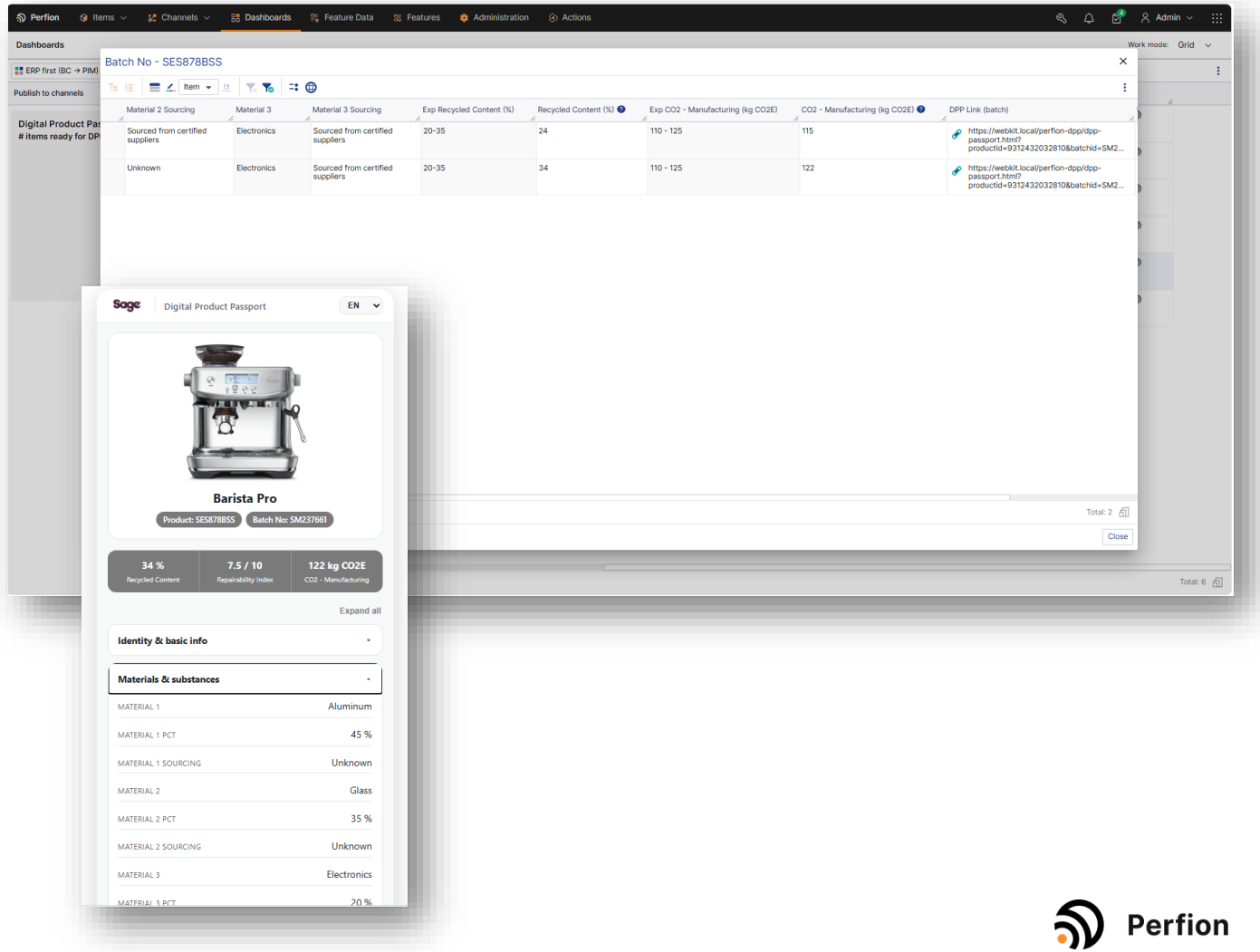
- Explain some data types
- Show components
  - Only relevant for complex products
  - Replaceability and “embedded DPPs”
- Click DPP Link (product) to show what a real-life DPP could look like at product level



Perfion

Digital Product Passport – Batch level

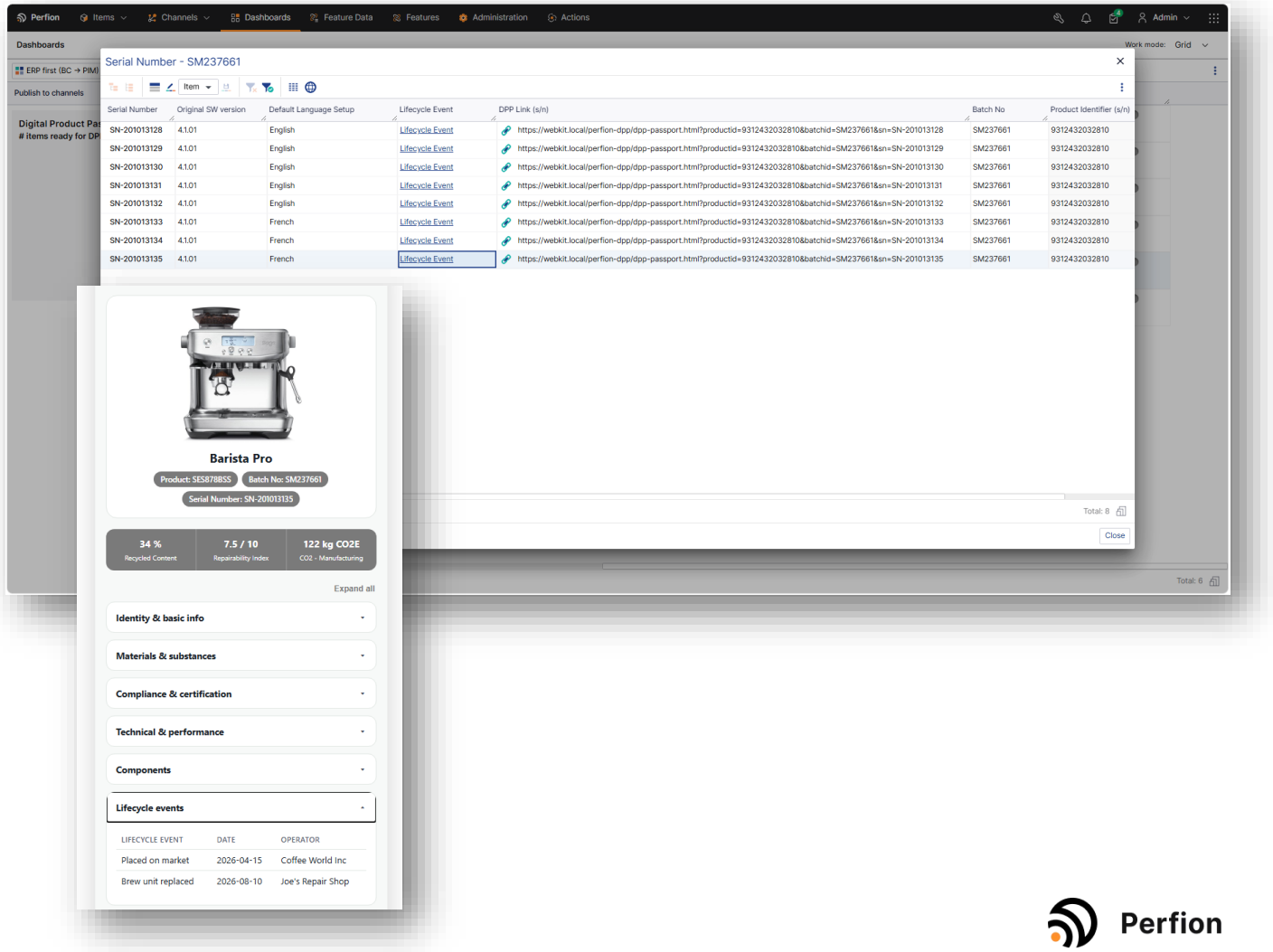
- Click Batch No in main grid and show Batch data in overlay
  - Explain how this could be synchronized from ERP and enriched in Perfion
- Explain Material sourcing
  - How actual material could be sourced differently for individual batches
- Click DPP Link (batch) to show what a real-life DPP could look like at batch level
  - Focus on sourcing information in Materials & substances



Perfion

Digital Product Passport – S/N level

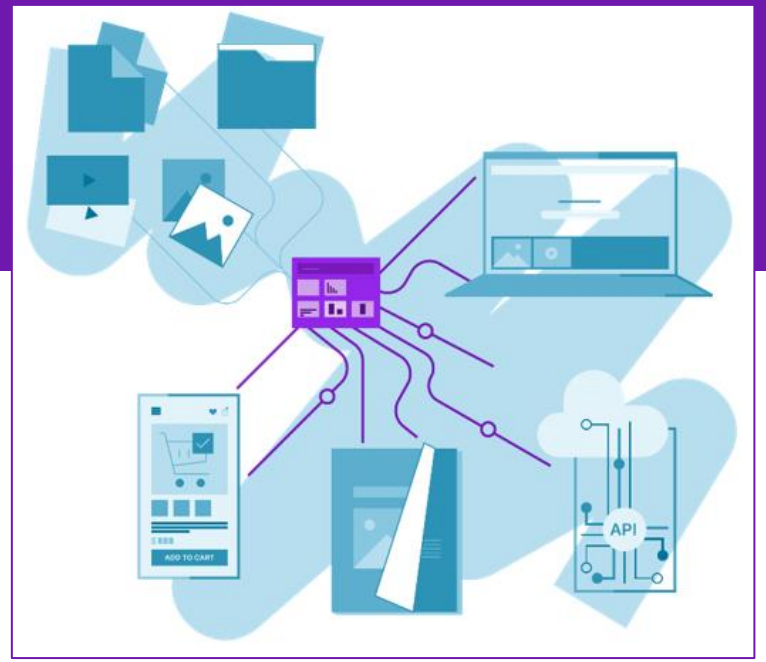
- Keep the Batch No grid open and click Serial Number
  - Explain how this would most likely not live in Perfion but included for demonstration purposes
- Click Lifecycle Event to show the beginning of lifecycle data
- Click DPP Link (s/n) to show what a real-life DPP could look like at S/N level
  - Focus on sourcing information in Materials & substances



Perfion

Process

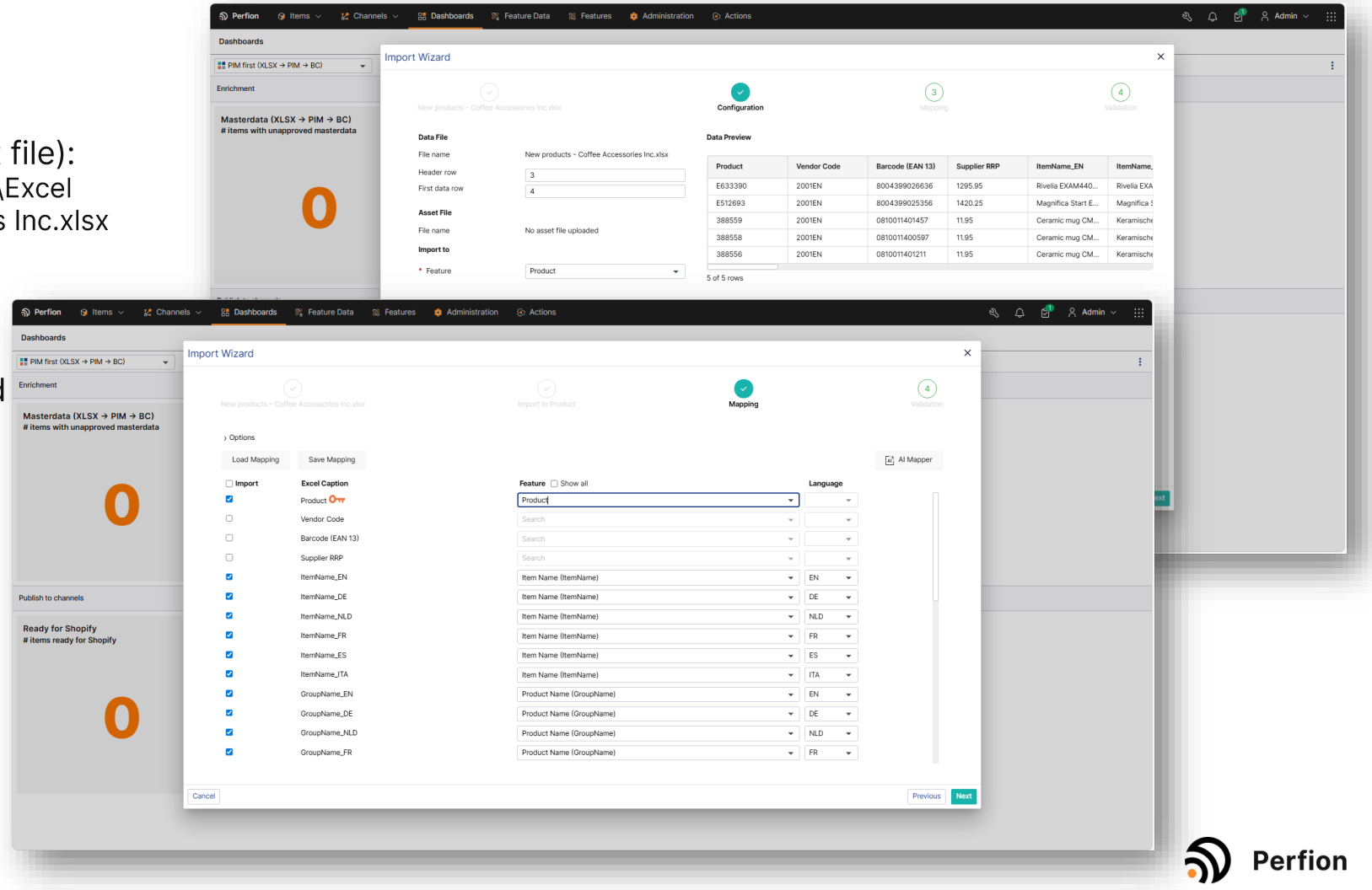
PIM First



Perfion

Import Wizard

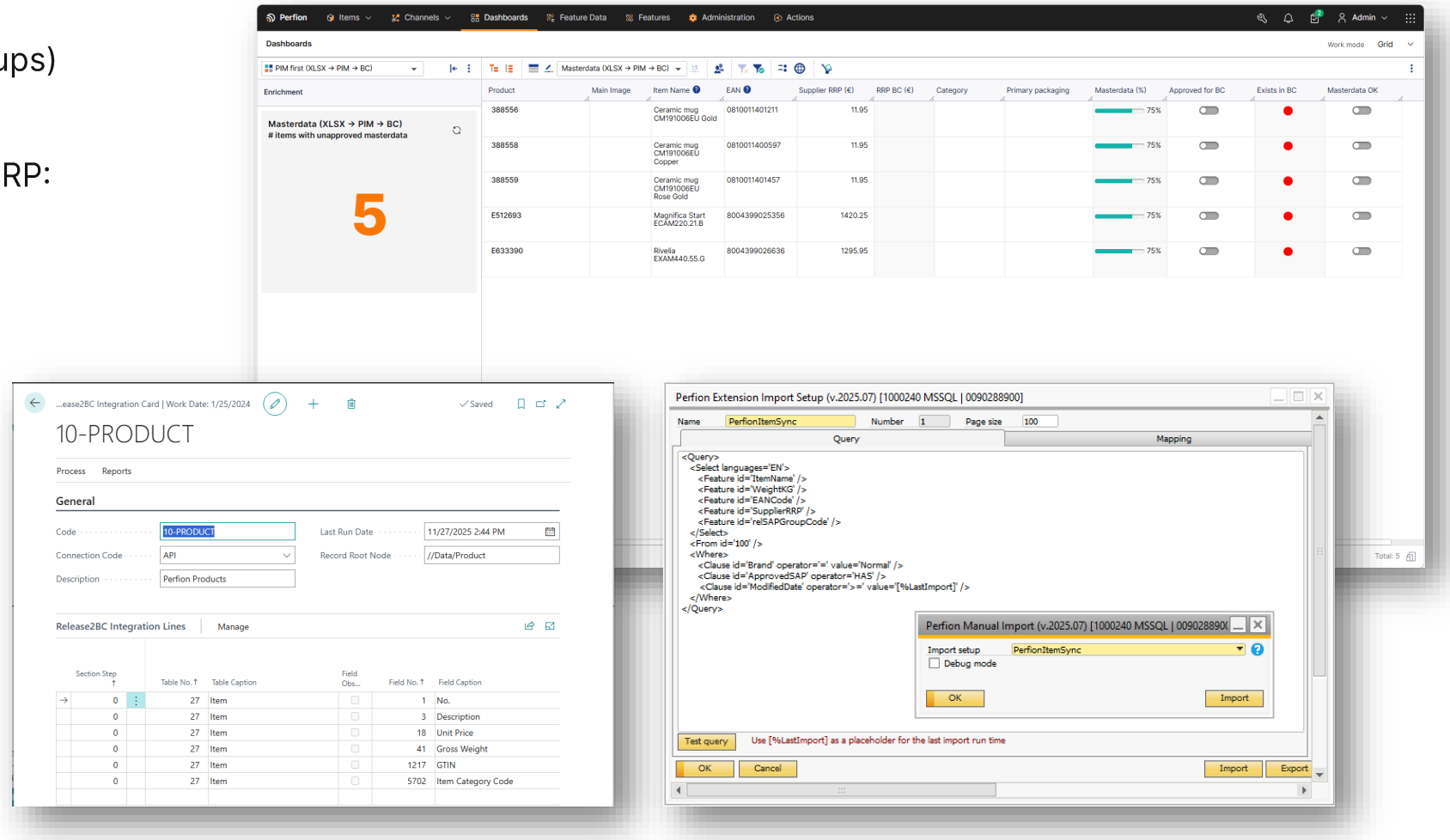
- Select relevant dashboard:
  - PIM First (XLSX → PIM → BC)
  - PIM First (XLSX → PIM → SAP)
- Start the Import Wizard
- Load this data file (do not load an asset file):
  - C:\Perfion Data\ActionSources\ _Import\Excel first\New products - Coffee Accessories Inc.xlsx
- Import settings:
  - Header row: 3
  - Data row: 4
  - Feature: Product
- Use AI Mapper to map three unmatched columns
- Import data



Perfion

Masterdata

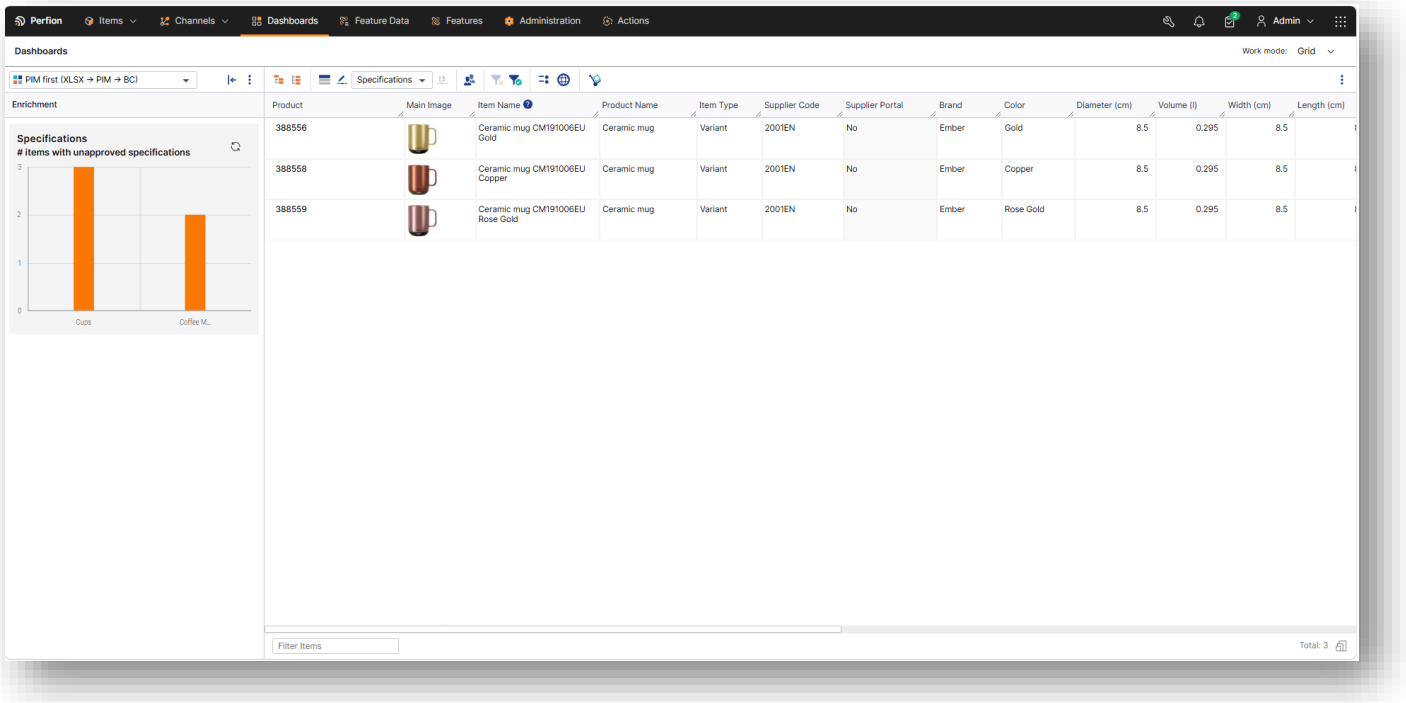
- Load images via context action
- Set Category (Coffee Machines or Cups)
- Refresh to see Primary Packaging
- Approve for BC/SAP
- Switch to BC/SAP and run Release2ERP:
  - **BC**: 10 - PRODUCT
  - **SAP**: PerfionItemSync



Perfion

Specifications

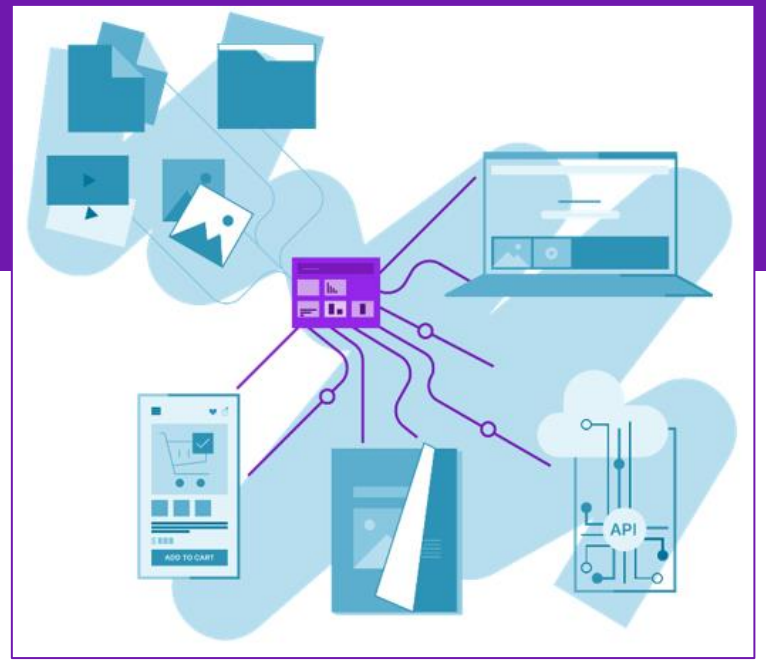
- All data is good (thanks you vendor ☺)
- Approve specs for both categories



All remaining widgets on PIM First dashboards identical to ERP First

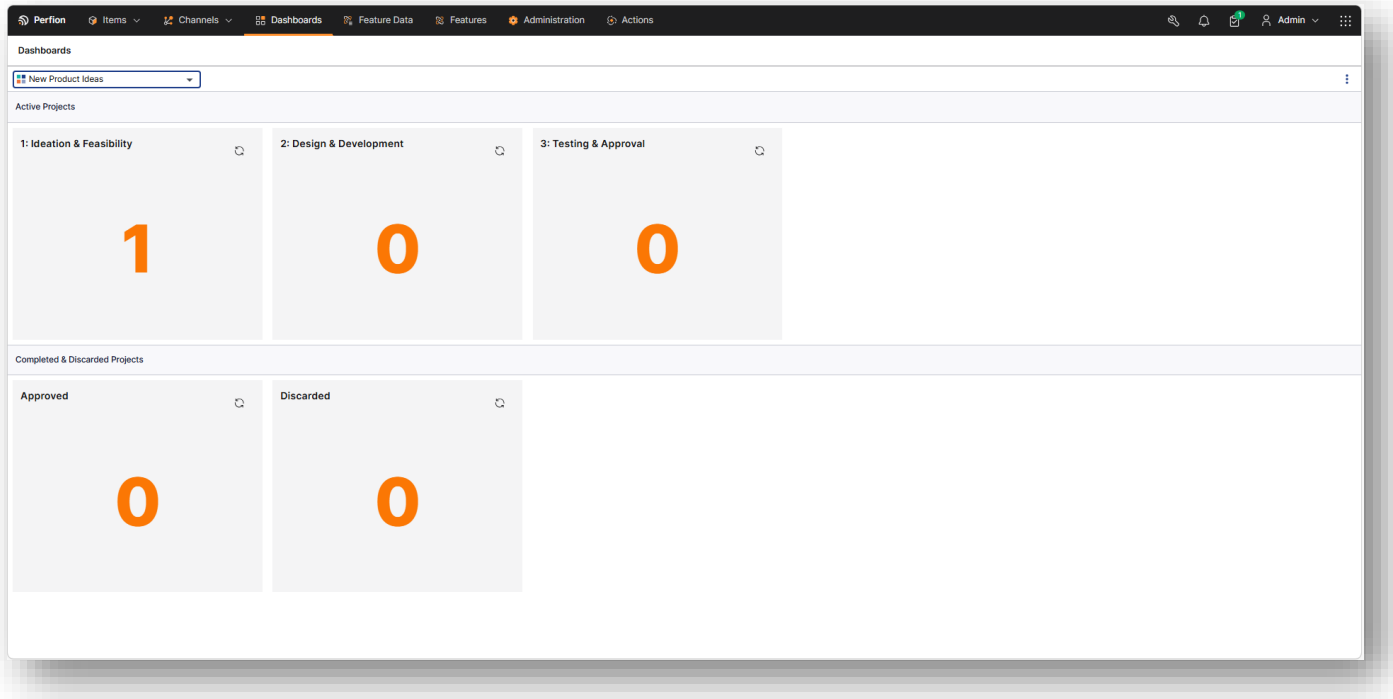
Process

New Product Ideas → Product Ideas First



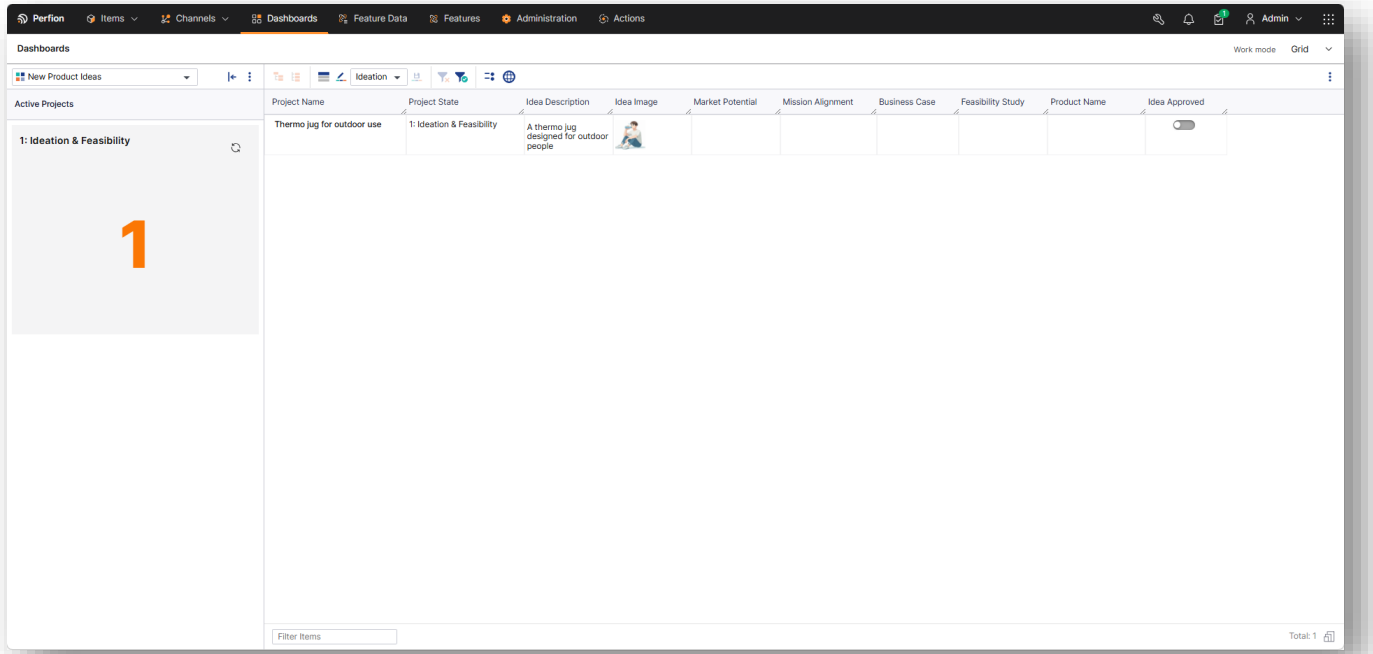
New Product Ideas

- Select dashboard:
  - New Product Idea
- One new idea pre-populated in stage 1: Ideation & Feasibility
- Select this one



1: Ideation & Feasibility

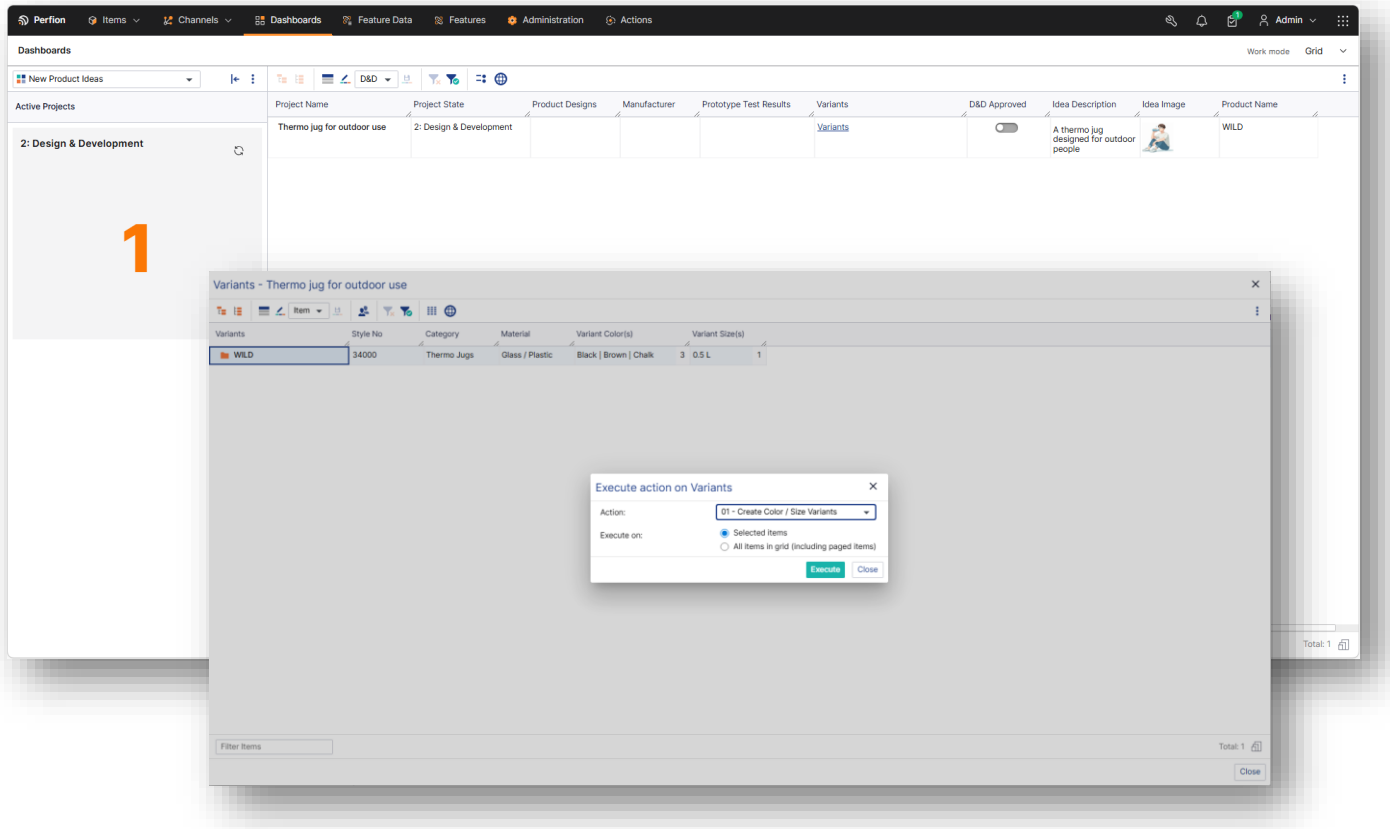
- Market Potential and Mission Alignment are text fields (write anything)
- Business Case and Feasibility Study are documents located in:
  - C:\Perfion Data\ActionSources\New Product Idea files
- Product Name must be set to **WILD**
- When approved, status auto changes



Perfion

2: Design & Development

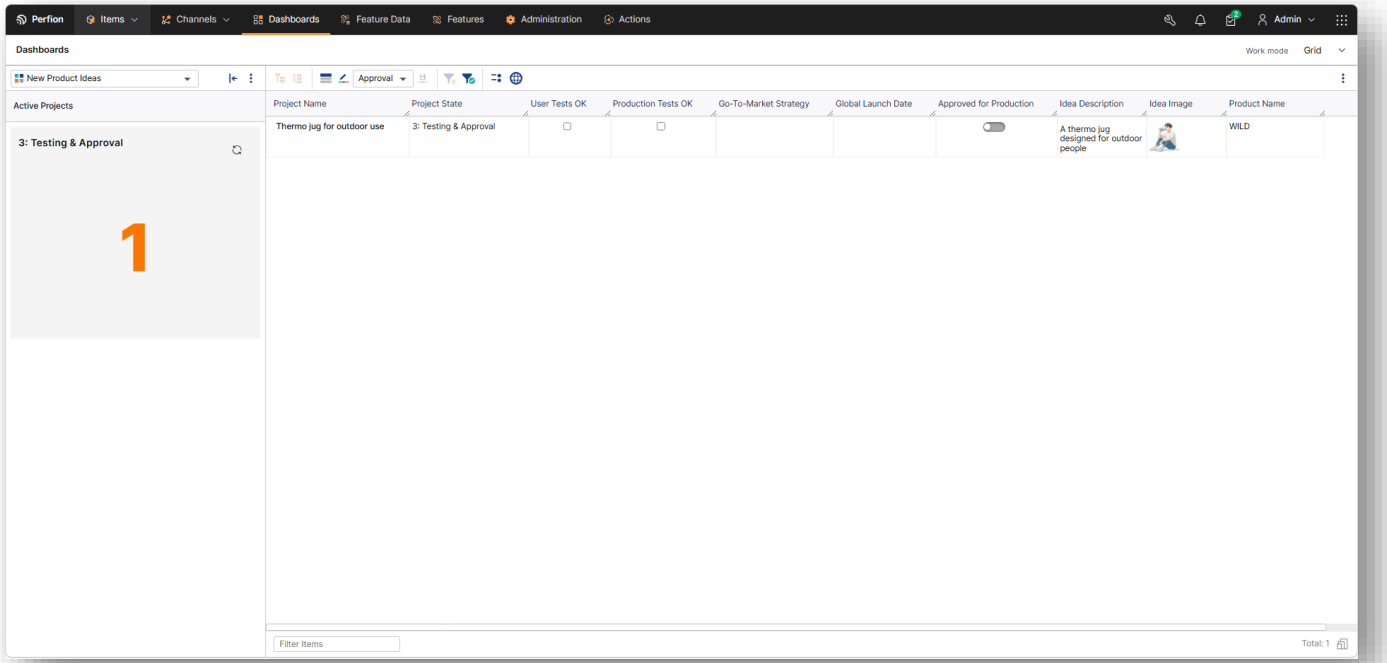
- Upload three WILD images to Product Designs from:
  - C:\Perfion Data\ActionSources\New Product Idea files
- Set Manufacturer = Coffee World
- Upload doc to Prototype Test Results
- In Variants:
  - Select Category = Thermo Jugs
  - Select Material = Glass/Plastic
  - Select Variant Color(s) = **Black**, **Brown** and **Chalk**
  - Select Variant Size(s) = **0.5 L**
  - Run context action Create Color / Size Variants
  - Refresh and show color/size child items
- Close Variants and approve D&D



Perfion

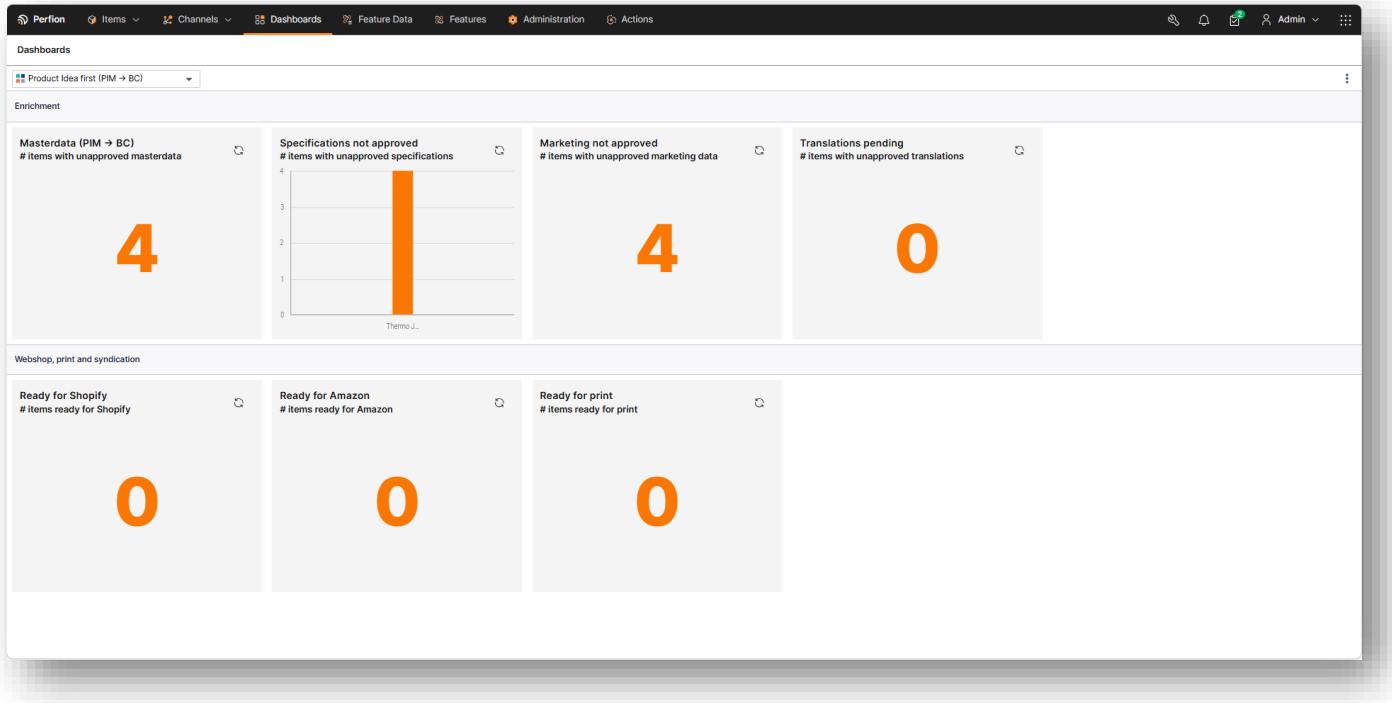
3: Testing & Approval

- Complete fields and approve for production
- This triggers two things:
  - Idea item is moved to status Approved
  - Variant structure from the Idea process is created as product items



Product Idea First (BC/SAP)

- Select relevant dashboard:
  - Product Idea First (PIM → BC)
  - Product Idea First (PIM → SAP)
- Items from the ideation process are ready for processing

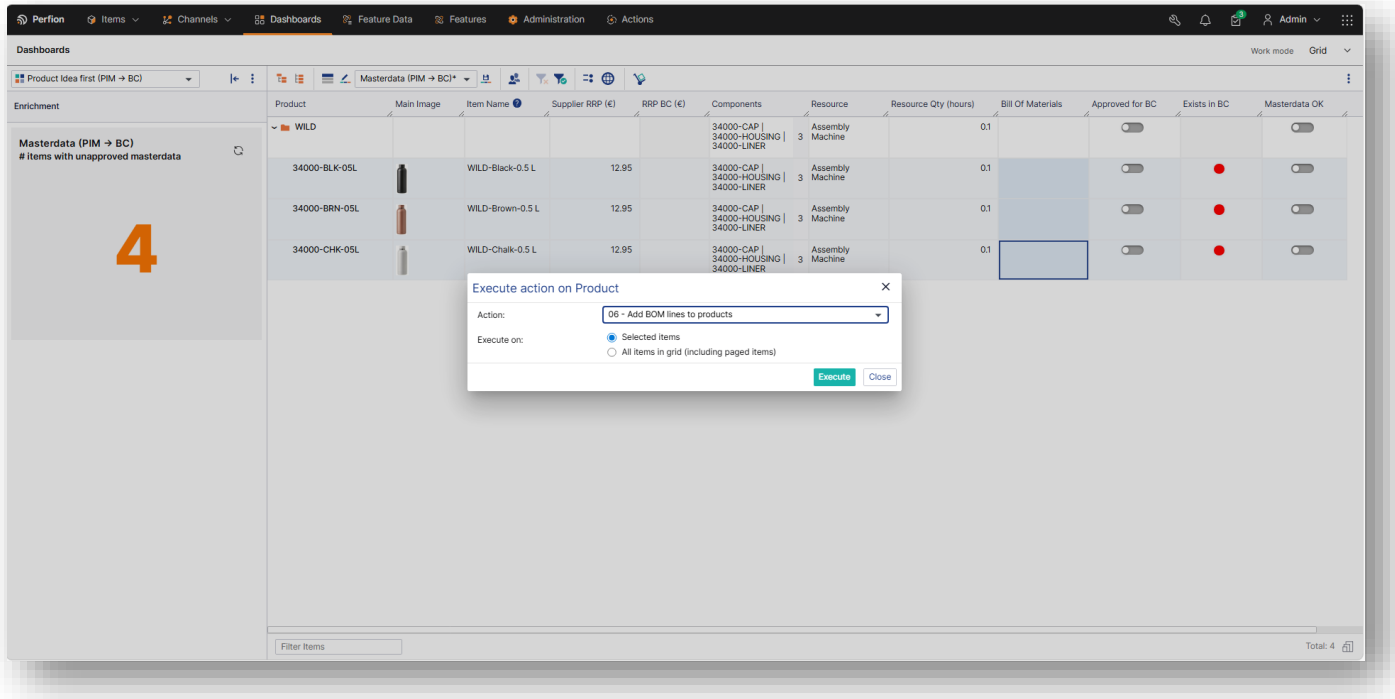


Masterdata

NOTE: This widget is mainly focused on BOMs

- In Components (at parent level), select the three components under Parts → Parts for Thermo Jugs
- In Resource (at parent level), select Assembly Machine
- In Resource Qty (at parent level), type 0.1
- In Bill of Material, select the three cells at child level and run context action 06 - Add BOM lines to products
- Refresh and show a BOM

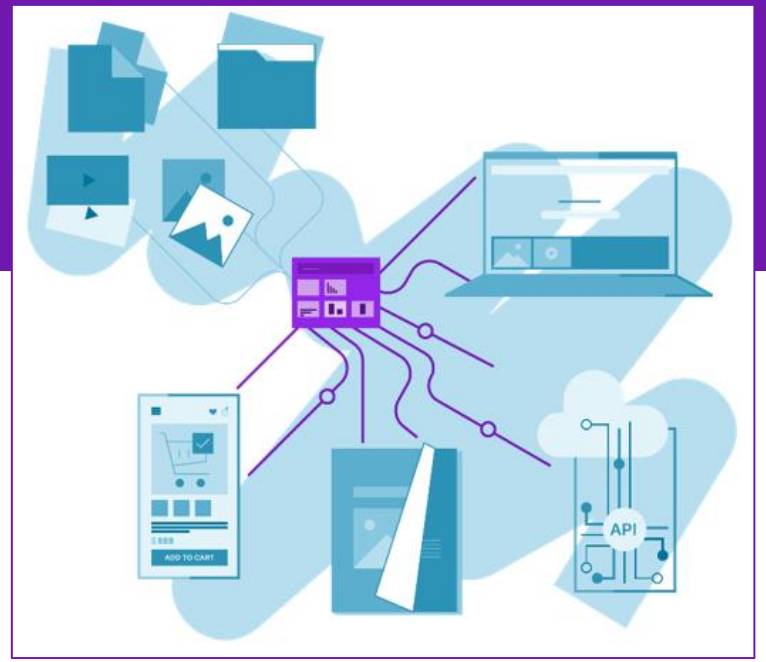
- Approve variants for BC/SAP
- Go to BC/SAP and run item sync first and BOM sync second



All remaining widgets on dashboard identical to ERP First

Process

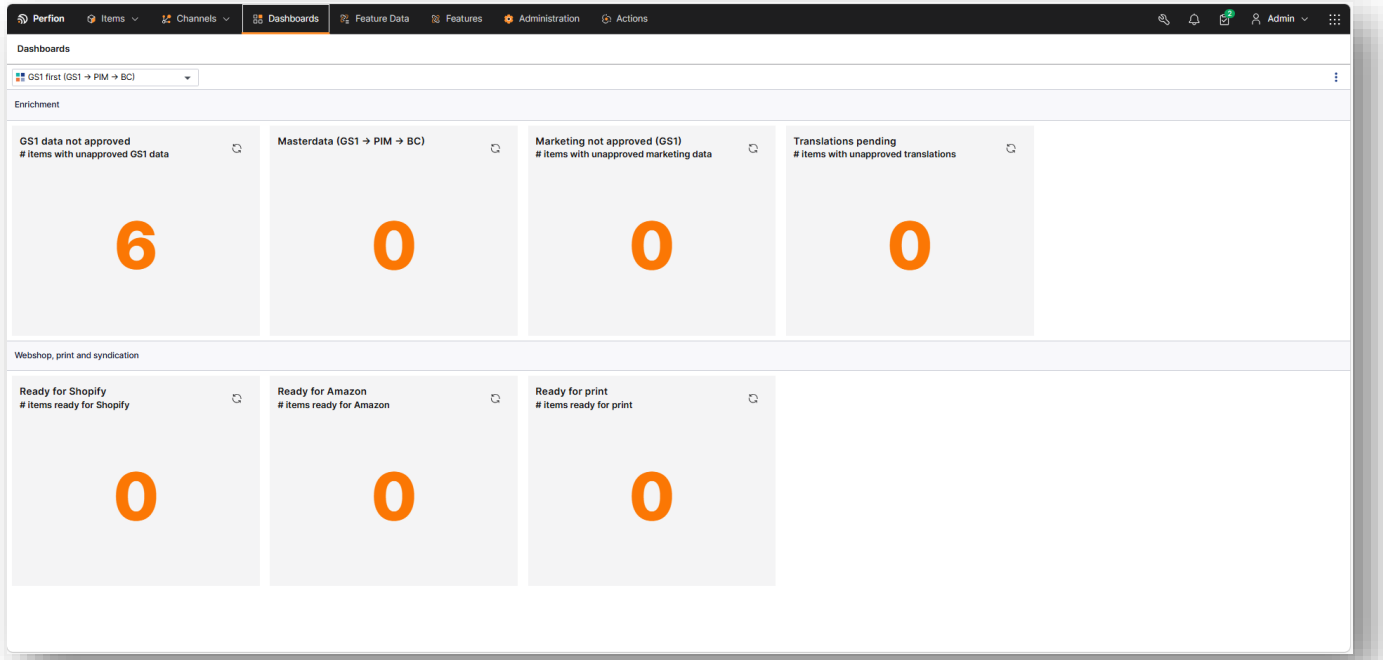
GS1 First



Perfion

GS1 First (BC/SAP)

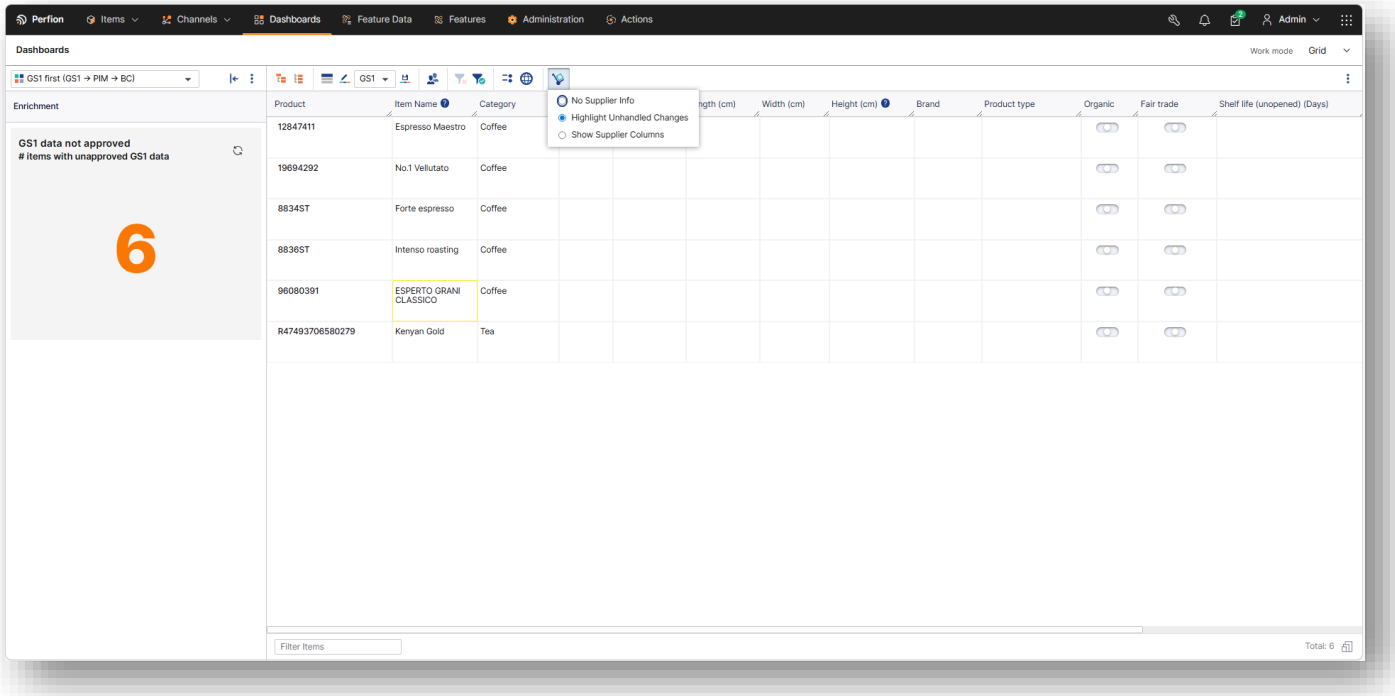
- Select relevant dashboard:
  - GS1 First (GS1 → PIM → BC)
  - GS1 First (GS1 → PIM → SAP)
- Run action GS1 → Import new product from Excel
- 6 items are created with minimal data



GS1 data not approved

- *NOTE: Make sure Supplier Data in toolbar is set to Highlight Unhandled Changes*

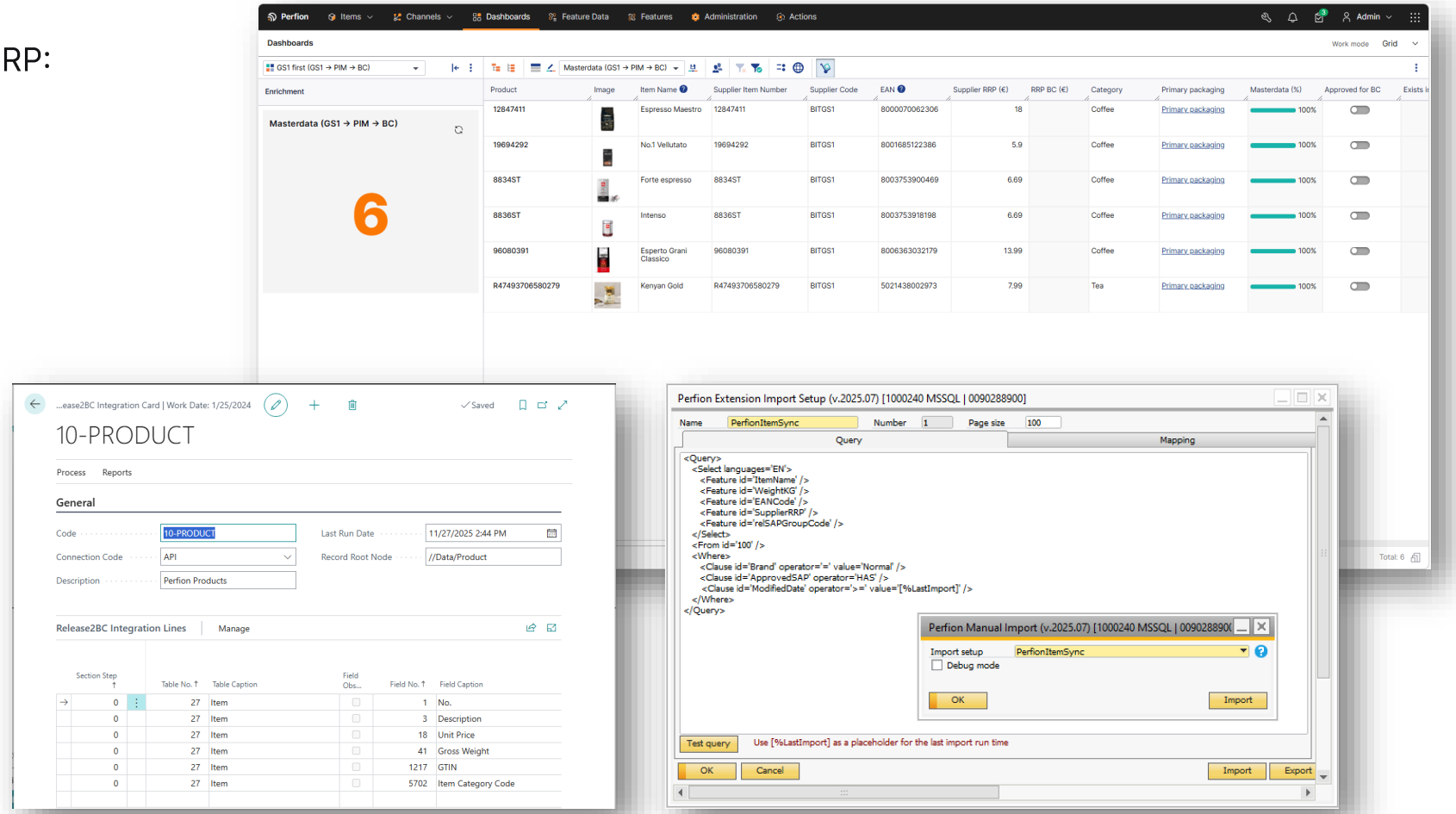
- Run action GS1 → 05 - Retrieve GS1 data
- Refresh grid to see images, data and yellow cells
- Show and accept supplier data using method of your choice
- Approve GS1 data



*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 **perfionsupplierGS1@boyum-it.com** / **PerfionDemo23** and delete created supplier items.*

Masterdata

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

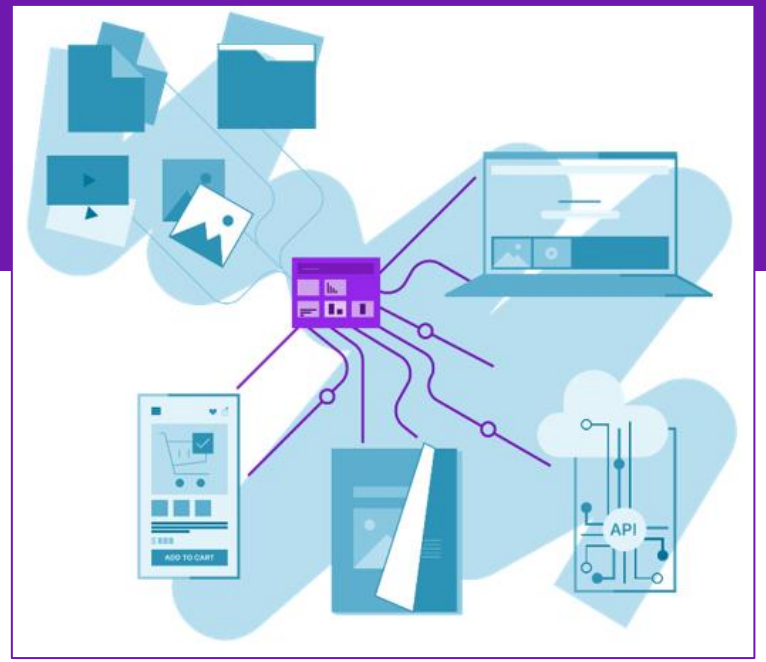


All remaining widgets on dashboard identical to ERP First

Perfion

Process

Supplier Portal First

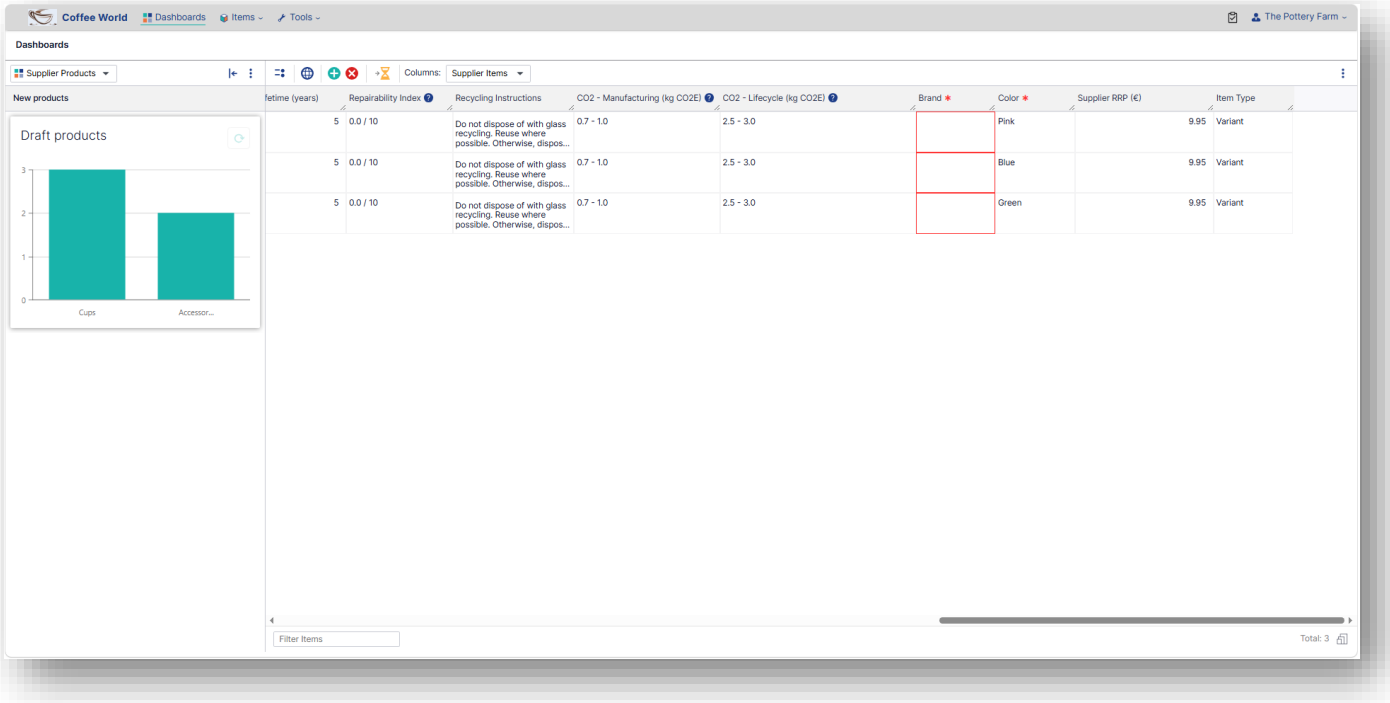


Perfion

Supplier Portal First (BC/SAP)

This process starts in the Supplier Portal

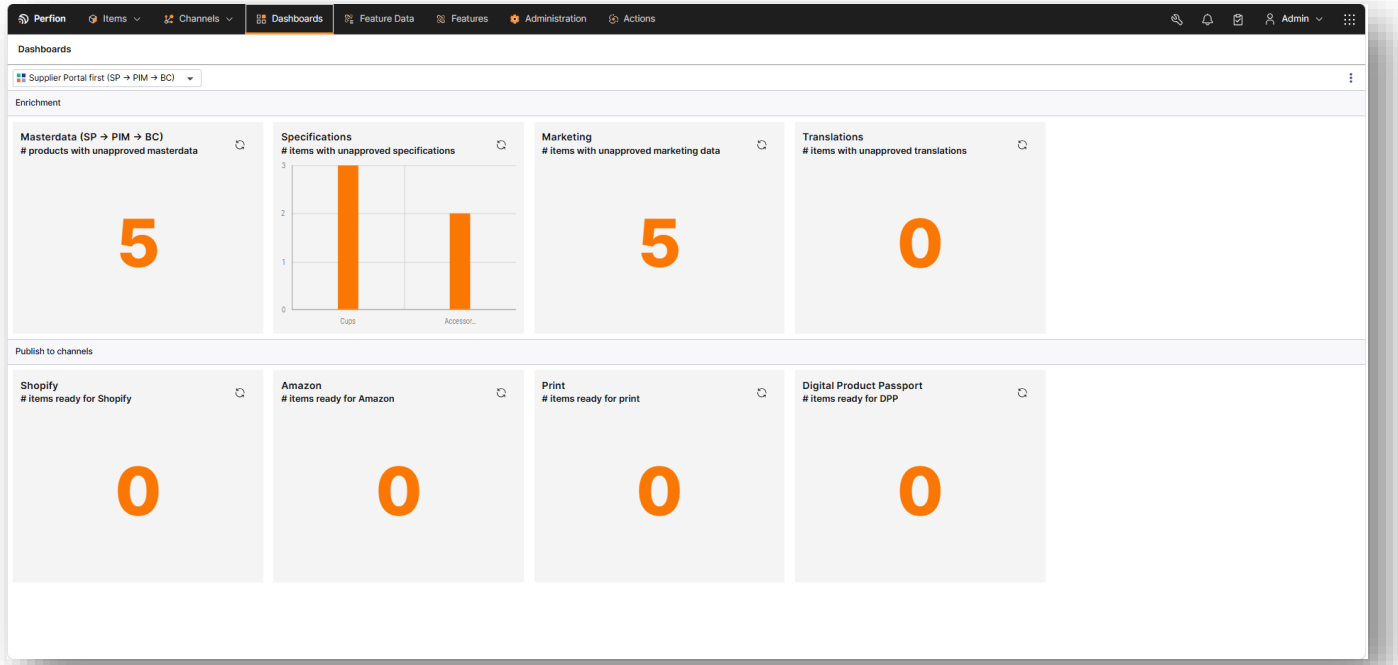
- Log in to supplier portal with:
  - **perfionsupplierEN1@boyum-it.com**
  - **PerfionDemo23**
- 5 items are pre-created
- In Draft products, select Cups
- Scroll to Brand and fill in the missing mandatory value (Scandi Living)
- Submit 3 cups
- Select Accessories
- All data is good → submit 2 accessories
- Go to dashboard and notice all product moved to Submitted
- Log out



Perfion

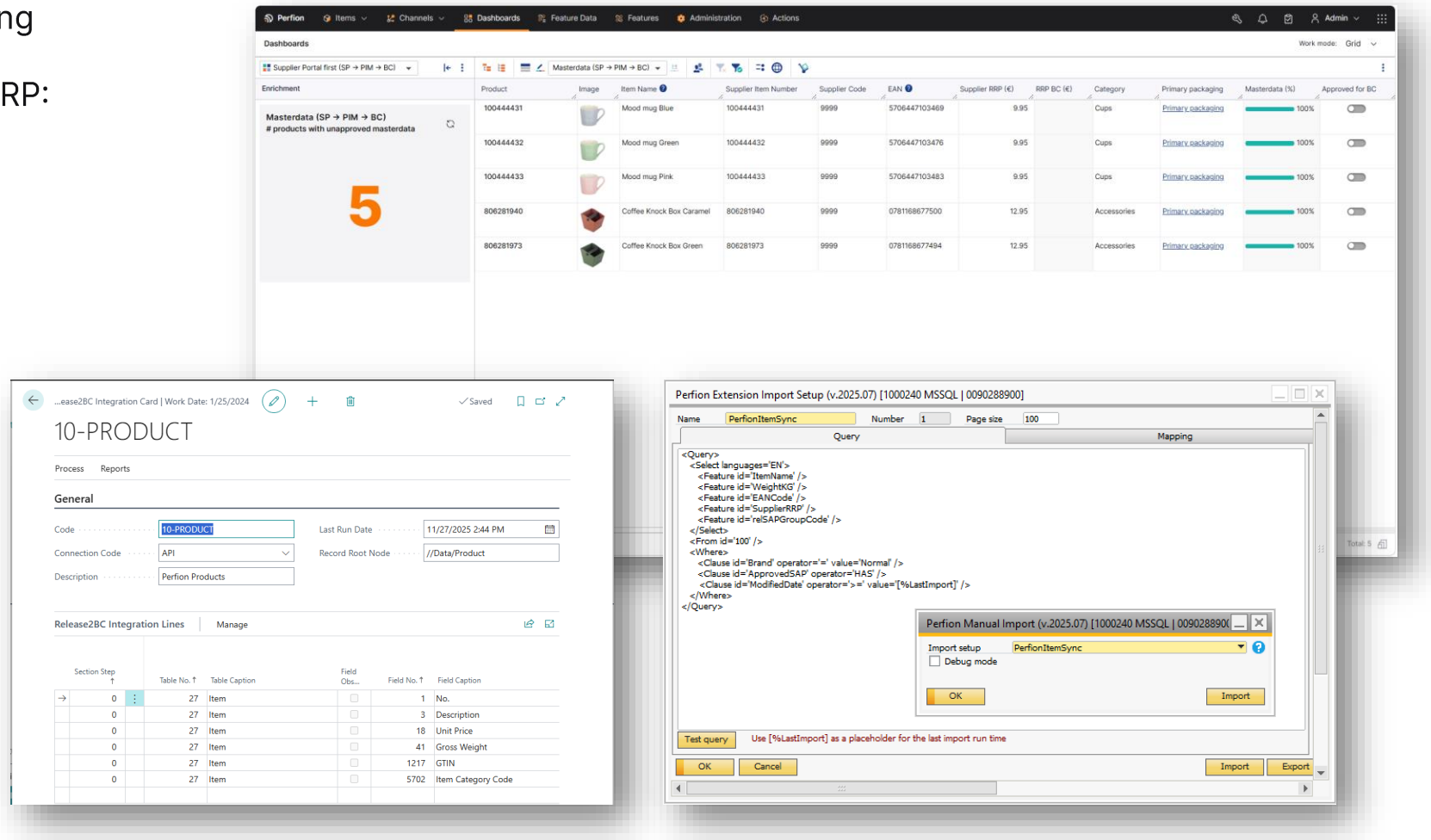
Supplier Portal First (BC/SAP)

- Select relevant dashboard:
  - Supplier Portal First (SP → PIM → BC)
  - Supplier Portal First (SP → PIM → SAP)
- 5 items from supplier portal are ready for processing



Masterdata

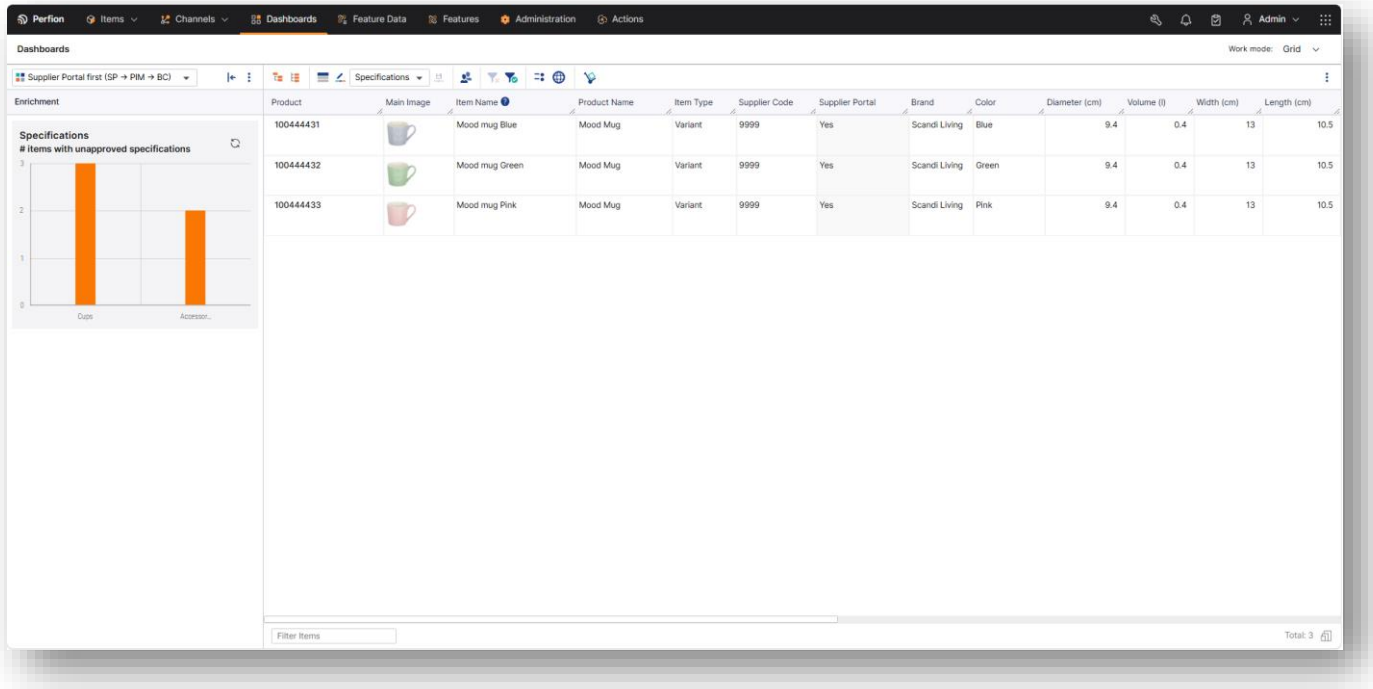
- Masterdata is complete from beginning
- Approve for BC/SAP
- Switch to BC/SAP and run Release2ERP:
  - **BC**: 10 - PRODUCT
  - **SAP**: PerfionItemSync



Perfion

Specifications

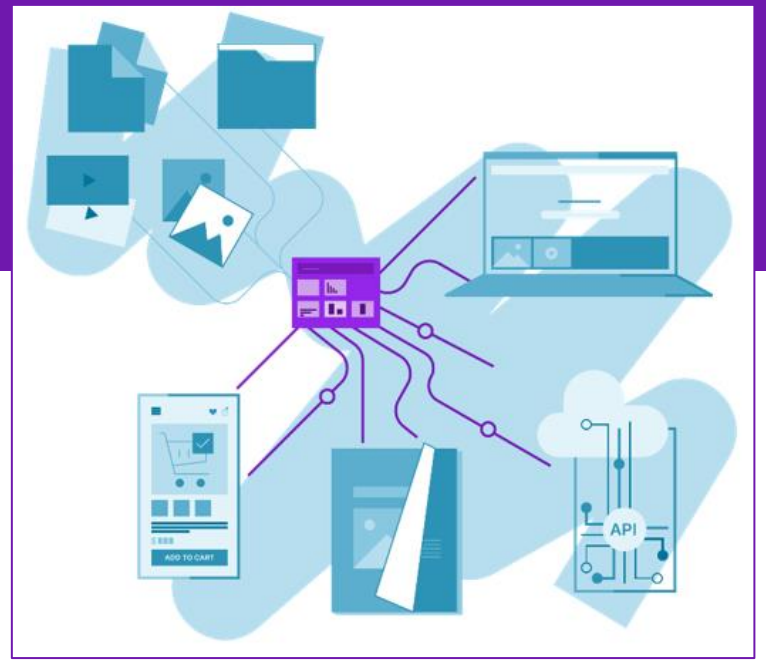
- All data is good (thanks you vendor ☺)
- Approve specs for both categories



All remaining widgets on dashboard identical to ERP First

Extra Options

Digital Asset Management
Content Store
Digital Product Passport
Promotional Items



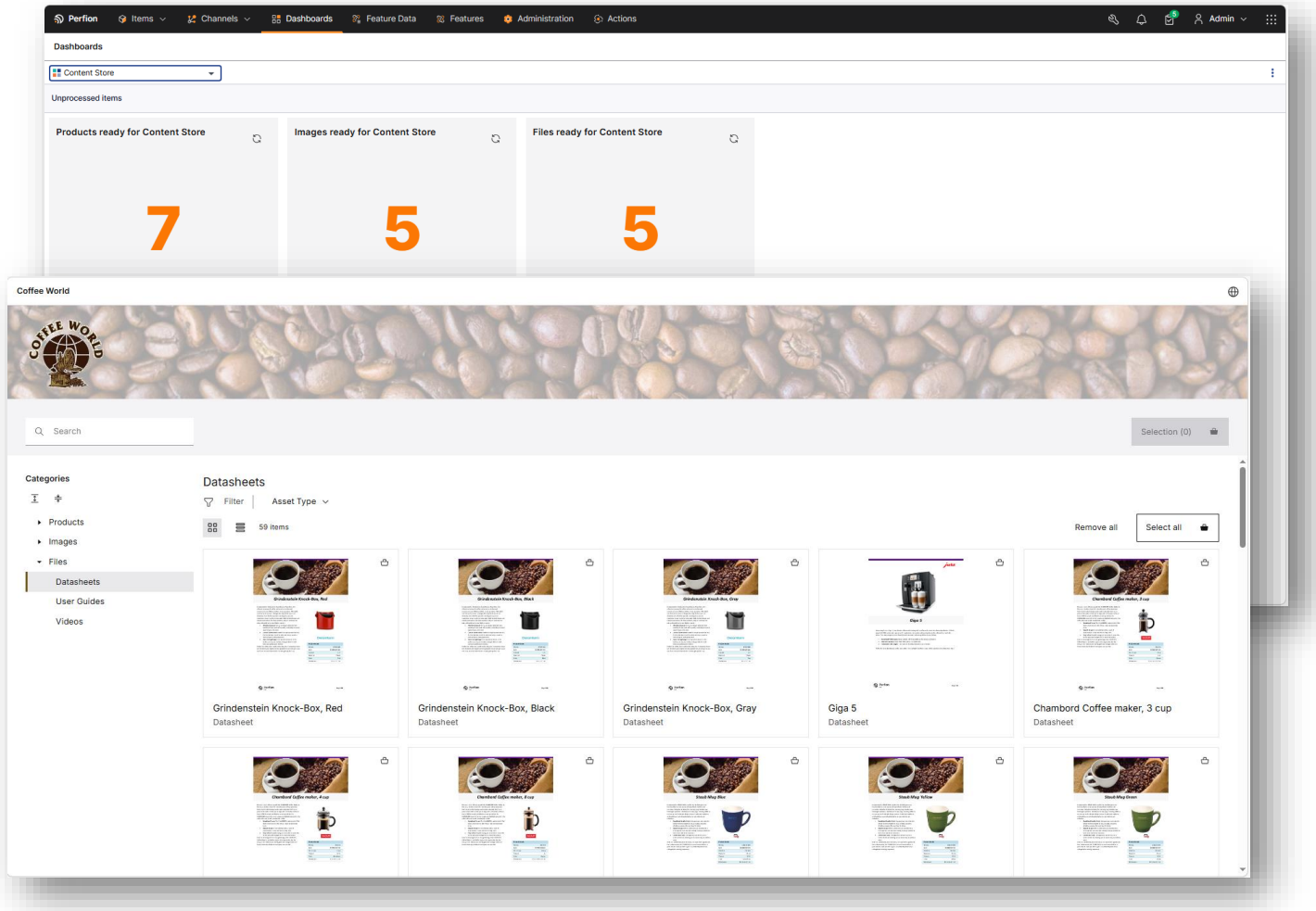
Perfion

Content Store

At the end of each process workflow, the created products images and datasheets can be published to the Content Store

- Select dashboard:
  - Content Store
- 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

- Go to Administration → Scheduled Jobs
- Start scheduled task **Content Store – Rebuild**
- Go to Content Store and show new products, images and/or files.

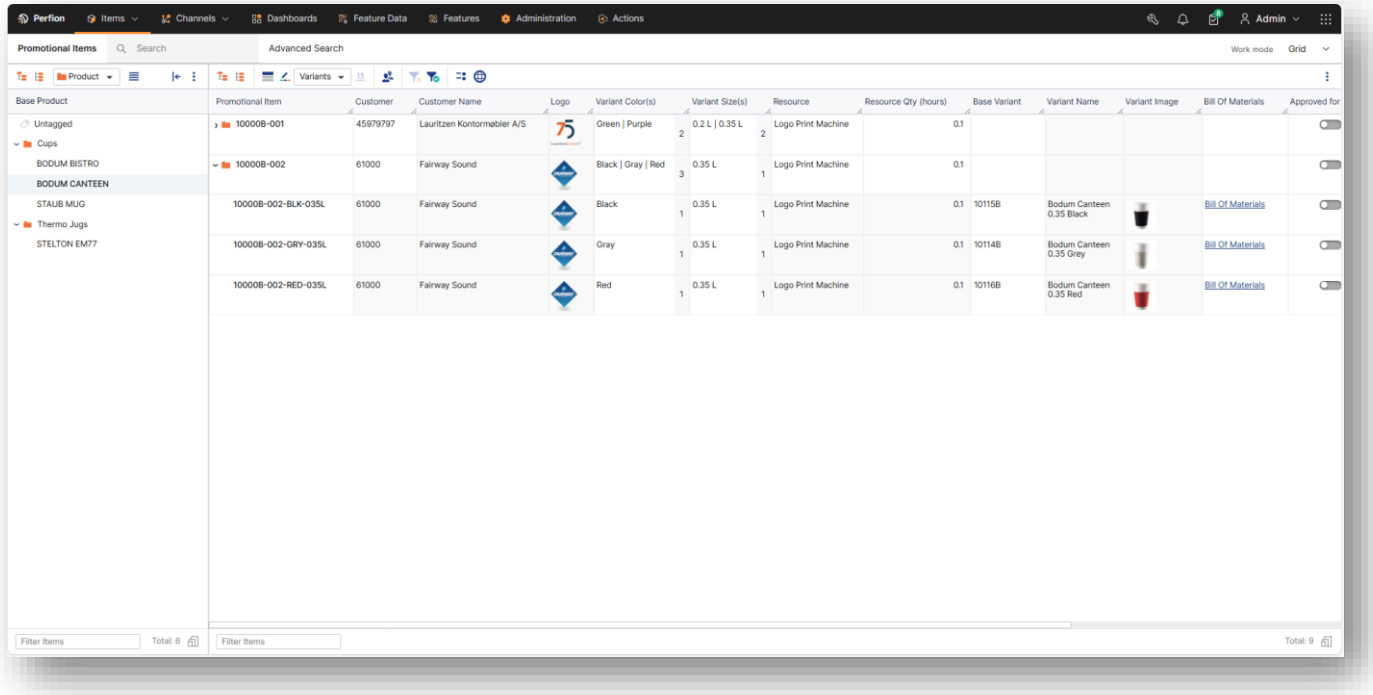


Perfion

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



Perfion

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Belgium
- Boyum IT Solutions bv

Spain
- Boyum IT Solutions Spain S.L.

Hungary
- Budapest Development Center

Bulgaria
- Paperflow Service Center