Case Pack Setup Using Smartsheets

Intended Audience: Vendors and Brokers

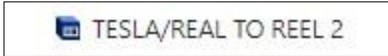**Purpose**: Guide Vendors through the process of setting up new Case Packs using Smartsheets

Contents

Overview:

In the Case Pack Setup Using Smartsheets job guide, you will learn how to set up new Case Packs in bulk through the use of Smartsheets.

📢 **IMPORTANT**: *PIM UI is not compatible with Internet Explorer.*

📝 **NOTE:** *The following characters are not compatible with PIM: @ ( ) , ` ~ ^ _ { } [ ] < > ; = * \ | ® © µ ¼ ½ ¾ Ñ ñ ¡ ¢ £ ¤ ¥ § ¨ « ¬ ° ´ ¶ º » ¿ ç ø € ‰ ‹ Œ ™*

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Key Terms	
GTIN	Global Trade Item Number (GTIN) is a unique number that identifies a specific Product or Case Pack. Every level of product configuration (consumer selling unit, case, inner pack, pallet, shipper etc.) requires a unique GTIN.
GS1 Hierarchy	A global product categorization method to determine what type of product something is and, therefore, what data fields should be displayed and required to complete the product setup process.
External Record	External Records are the similar Products sold to Meijer by multiple Vendors. This is the version of the product created and submitted for proposal (by the Vendor or MSA on behalf of the Vendor). 1. When searched, External Records are displayed in dark blue color. TESLA/REAL TO REEL 2 The ID for External Records are prefixed with EXT followed by 6+ digits. Example – EXT-XXXXXX
Internal Record	One or more External Records are linked to a single sellable item that is referred to as an **Internal Record**. This is the version of the record edited by the MSA. 1. When searched, Internal Records are displayed in light blue color. TESLA/REAL TO REEL 2 The ID for Internal Records are prefixed with INT followed by 6+ digits. Example – INT-XXXXXX
Golden Record	Internal Records are enhanced by the MSAs to form a **Golden Record**. There is always a one-to-one relationship between the Internal and Golden Records. The Golden Record is a sellable item and is passed to PMM, CFD, and other downstream Meijer systems. This is the completed and final version of the product. 1. When searched, Golden Records are displayed in yellow color. TESLA/REAL TO REEL 2 The ID for Golden Records are prefixed with GR followed by 6+ digits. Example – GR-XXXXXX
Case to Child Product Reference Type	This is a cell in the Case Pack Smartsheet that establishes the relationship between the Case Pack and the Product. This ensures the case pack is added to the correct Product external record when the Smartsheet is imported.
Assign	This button allows you to assign the record to yourself for review and approval.
Add to basket	This button in the Proposal and Enrichment workflow stages allows you to add selected Products to your basket. The basket is used to hold a group of records for the user to review or edit in bulk.
Export to smartsheet	This button in the Proposal and Enrichment workflow stages allows you to export external product records to a Smartsheet in order for the user to review or edit in bulk.
Custom Export	This button in the Proposal and Enrichment workflow stages allows you to export customized product data to an Excel spreadsheet. It is intended for data collection and review only and cannot be imported back to PIM.
Submit	This button allows you to submit the record(s) to the next stage in the workflow.

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Create Case Packs: Smartsheet

1. Access the PIM UI from VendorNet. On the Home login page, click **Meijer Vendor Login**. 📢 *IMPORTANT: PIM UI is not compatible with Internet Explorer* 📝 *NOTE: Do not enter VendorNet User ID and Password on this screen.*	
2. If prompted, enter the VendorNet User ID (vendor's email address) and password. Click **Sign On**.	
3. Click on the **Meijer Supplier UI** link to enter PIM. 📢 *IMPORTANT: Selecting **Meijer PIM UI** will prevent the user from accessing any functions.*	

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4. The Stibo User Web UI home page is displayed with widgets in the center and a side panel on the left side of the screen. The left side panel may be expanded to show the full task menu by clicking the Menu ☰ button. 📢 **IMPORTANT:** *Return to the PIM vendor home page at any time by clicking the Meijer icon* **meijer** *in the upper corner of the left side panel.*	**Stibo User Web UI** 1006466-KODIAK TEST VENDOR • (325981) • English US • Main **Links** Start by downloading an empty Smartsheet. Download Smartsheet Once completed, import your Smartsheet. Import Smartsheet **Vendor Workflow** Initiate Proposal — 3 Enrichment — 0 Rework — 1 Rejected — 0 Total — 4 **Asset Importer** Upload Product Images — Select file POG Image Importer — Select file
📢 **IMPORTANT:** *Before a new case pack can be created, a* **Product external record** *must exist in PIM for the specific* **Product GTIN** *and* **Vendor Number** *that will be applied to the case pack.* *If PIM does not have a* **Product external record** *for the case pack's* **Product GTIN** *and* **Vendor Number***, please initiate a Product external record before continuing. Refer to the* **Product Setup** *guides for instructions.*	
5. Make sure the required Product external record(s) for the new case packs exist and are currently in the **Proposal** stage of the Vendor Workflow. 📝 **NOTE:** • *The Product external records may, alternatively, be in the* **Enrichment** *stage of the Vendor Workflow.* • *If the Product external records are not located in a stage of the Vendor Workflow, you can use* **Advanced Search** *to find the necessary records and add them to the workflow. See the* **Product Maintenance** *job guide for more information on using* **Advanced Search.**	1006466-KODIAK TEST VENDOR • (325981) • English US • Main Item in state: Proposal of the WF: External Source Record Handling Select all · Clear all filters · Assign · Add to basket · Export to smartsheet · Custom Export · Submit | Last Updated	Product ID	Product Name	ID	GTIN	Vendor Name	Assigned to me	Assignee
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2023-12-14		Test Bowl 1	EXT-14615027	708820157699	1006466-KODIAK TEST VENDOR	☐	Stibo_Vendors
2023-12-14		Test Bowl 2	EXT-14615028	708820157712	1006466-KODIAK TEST VENDOR	☐	Stibo_Vendors
2023-12-14		Test Bowl 3	EXT-14615029	708820157835	1006466-KODIAK TEST VENDOR	☐	Stibo_Vendors
2023-12-14		Test Bowl 4	EXT-14615030	708820157897	1006466-KODIAK TEST VENDOR	☐	Stibo_Vendors
2023-12-14		Test Bowl 5	EXT-14615031	708820157903	1006466-KODIAK TEST VENDOR	☐	Stibo_Vendors	

6.	On the PIM home screen, click **Download Smartsheet** in the **Links** widget to create case packs in bulk.	
7.	The **Stibo Web UI Project** screen is displayed with widgets for different kinds of Smartsheets. The **Smartsheet-CasePack** widget is used to download a smartsheet for new case packs.	
8.	Select the **Node** icon in the Smartsheet-CasePack widget.	
9.	The Select Node(s) window is displayed. Select **External Packaging (EXT.Packaging)**.	
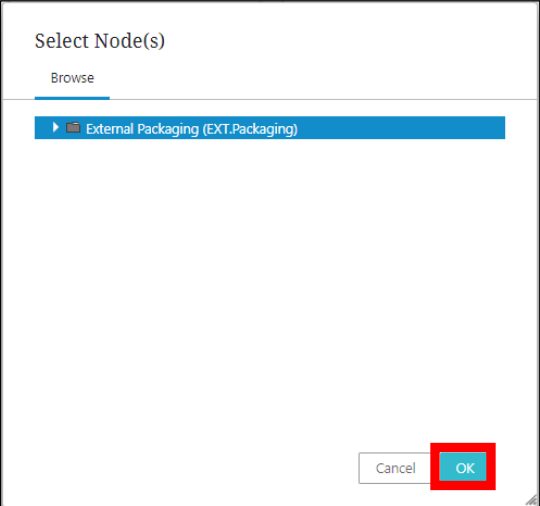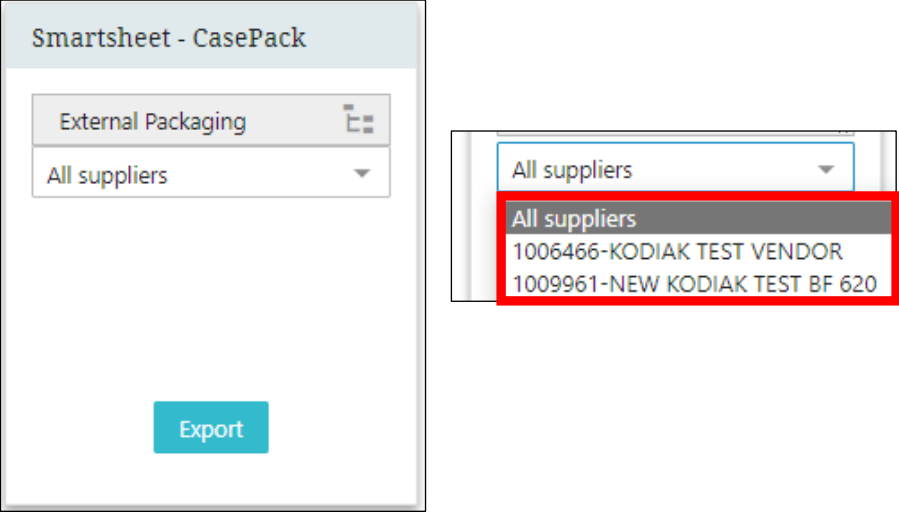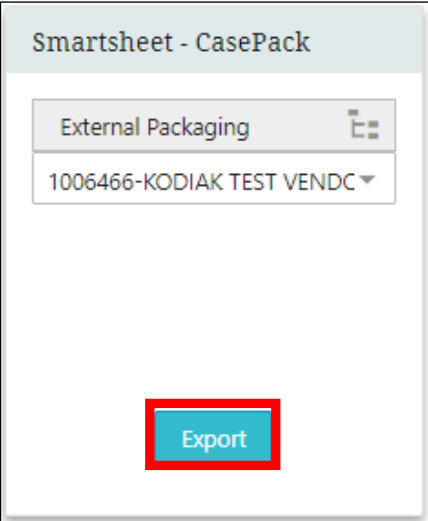
10. **External Packaging (EXT.Packaging)** is highlighted and the **OK** button is enabled. Click **OK**.	Select Node(s) Browse ▶ ☐ External Packaging (EXT.Packaging) Cancel OK
11. Click the **All suppliers** drop-down list to select the supplier you will use to create the new case packs. 📢 **IMPORTANT:** • *The supplier **MUST** be the same supplier that was used to create the Product external record(s).* • *If a user represents only one supplier, this option will not appear.* 📝 **NOTE:** *If you do not select a suppler at this step, you will need to select the supplier for each line item on the Smartsheet.*	Smartsheet - CasePack External Packaging All suppliers ▼ Export All suppliers ▼ **All suppliers** 1006466-KODIAK TEST VENDOR 1009961-NEW KODIAK TEST BF 620
12. Click **Export**.	Smartsheet - CasePack External Packaging 1006466-KODIAK TEST VENDC ▼ Export

13. A notification is briefly displayed that the process to export the Smartsheet has been started. Click the **hyperlink** in the notification message. Alternatively, you can click the **Recent background processes** icon in the upper right corner of the screen. Then click the top **Smartsheet template export** hyperlink displayed in the list of Finished Processes.	Smartsheet template download started as background process with id BGP_14655635 ✕ K TEST VENDOR • (325981) • English US • Main 🕐 🔔² ⌄ Finished Processes (3) Open Process List Smartsheet template export (External_Packaging-2023-1. 2023-12-18 09:44 - 2023-12-18 09:44 325981 Download Smartsheet template export (Bowls__Non_Disposable_-2... 2023-12-13 16:07 - 2023-12-13 16:07
14. The **Background Process Details** screen is displayed. Click the hyperlink under **Status** to download the Case Pack Smartsheet template.	**Background Process Details** ID BGP_14655635 Started By 325981 Description Smartsheet template export (External_Packaging-2023-12-18_14.44.40.xlsm) Template ID Export Manager Pipeline Status ✓ Succeeded External_Packaging-2023-12-18_14.44.40.xlsm Started 12/18/23, 2:44:39 PM Finished 12/18/23, 2:44:40 PM Elapsed 4 s ⎋ Export | ID	Type	•	Text | |---|---|---|---|
1	Info		Export process started (Mon Dec 18 14:44:39 UTC 2023)
1778	Info		Logging on to PIM server meijer-prod-step-app-1.mdm.stibosystems.com	
15. The Smartsheet template is downloaded. Click the file to open the Smartsheet template. 📝 **NOTE:** *The download notification may appear differently depending on the browser in use.*	0Using%20Smartshe... ☆ ⧉ ⭐ ⊞ ↓ Downloads 🗀 🔍 ⋯ 📌 📄 External_Packaging-2023-12-18_14.44.40.xlsm Open file See more

16. The Smartsheet template is displayed.	
17. Click the **Enable Editing** button.	
18. Click the **Enable Content** button.	
19. The **Cover** sheet is displayed with details about the Smartsheet and the color codes used. Read through the information on the Cover sheet. Click the **External Packaging** sheet.	
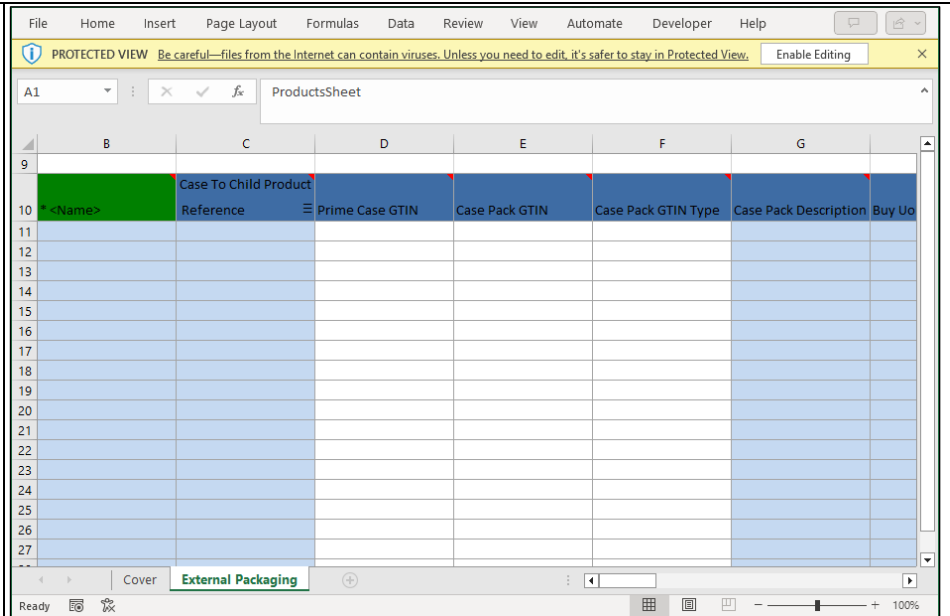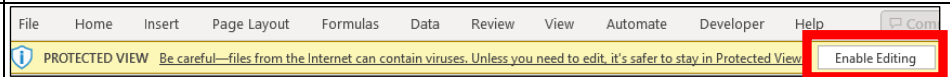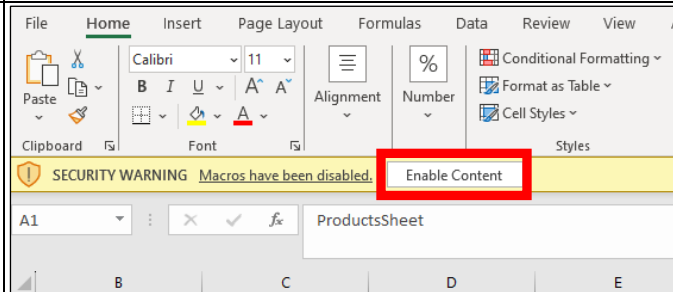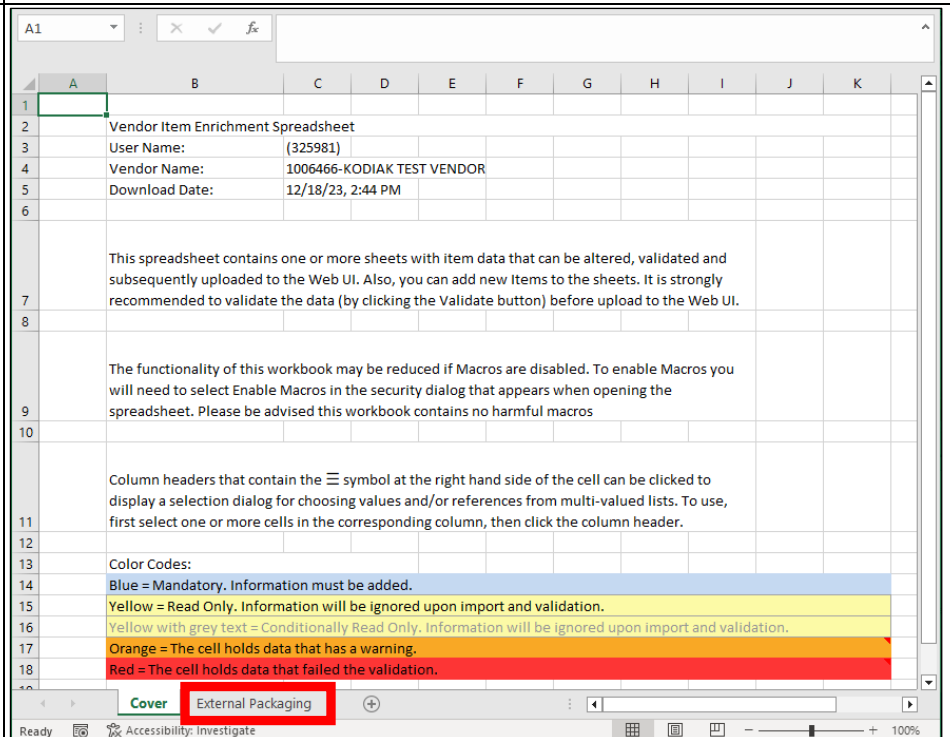
20. Enter the names of the Products in the ***<Name>** column.

   NOTE: *You can copy and paste data from other sources into the Smartsheet. Paste values only (no formatting).*

21. If you did _not_ select a specific supplier for the Smartsheet in step 11, the **Supplier** column appears in the Smartsheet, and a supplier must be selected for each case pack.

   Click the drop-down arrow to the right of each cell in the column and select the appropriate vendor number from the list.

   IMPORTANT: *The supplier **MUST** be the same supplier that was used to create the Product external record(s).*

   NOTE: *This column will not appear if a supplier was selected for the Smartsheet in step 7.*

22. The **Case To Child Product Reference** column allows the user to connect the case pack(s) being created to the appropriate Product external record(s). This ensures the case packs are added to the correct Product records when the Smartsheet is imported.

   Select the cell you wish to populate and then click the icon in the column header cell.

23. A new window will appear in the computer web browser, and the user will be logged in to PIM. A message will appear in the browser window indicating the Smartsheet has been authenticated. Close the window and return to the Smartsheet.	meijer-prod-step.mdm.stibosyst ✕ + ← C ⌂ 🔒 https://meijer-prod-step.mdm.stibosystems.com/shee Import favorites Smartsheet has been authenticated for user 325981. You can close this window
24. In the Smartsheet, the **Login** pop-up window is displayed. Click **Login**.	Login ✕ Username: Single SignOn User Password: Cancel Login
25. The **Case to Child Product Reference** window is displayed.	Case To Child Product Reference ✕ Search | Browse | Selected [ ] Search -> <- Cancel OK
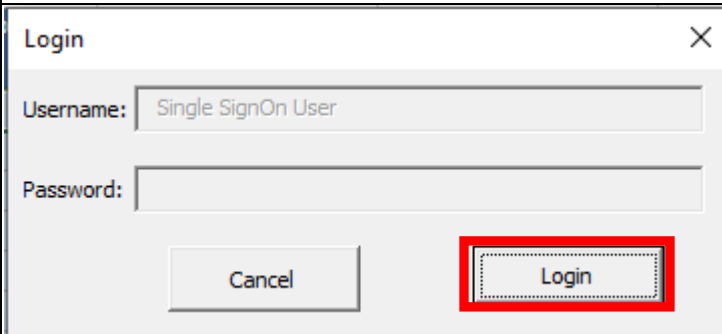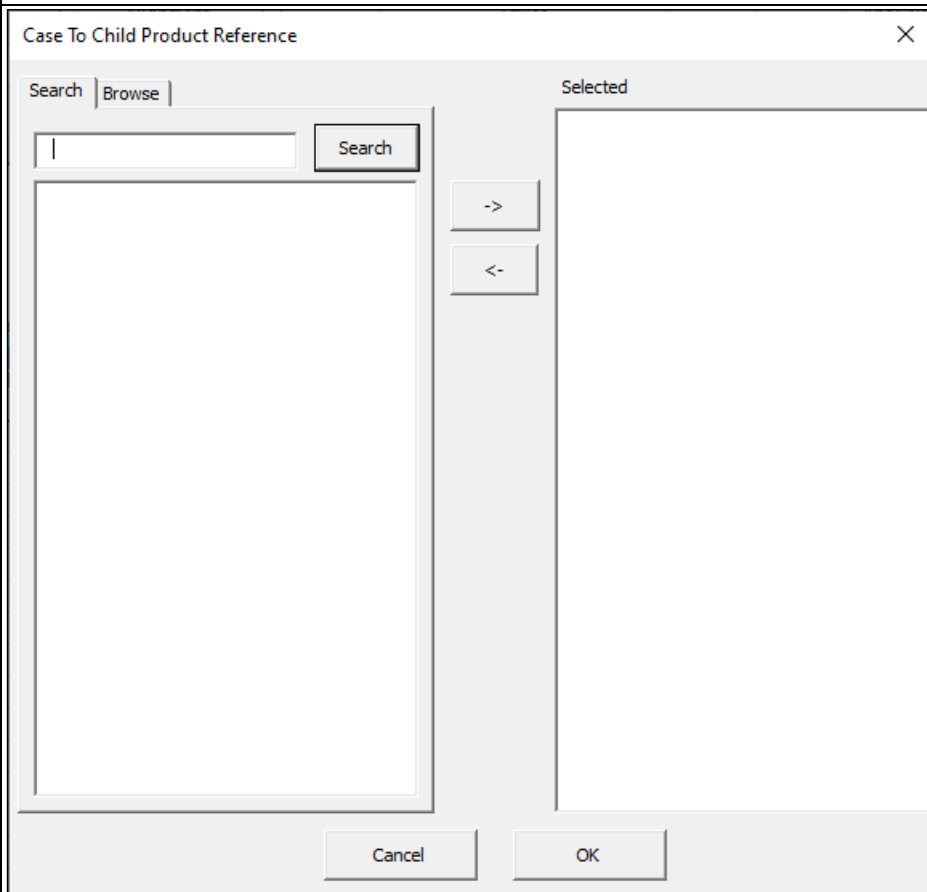
26. Search for the Product by entering the **Product Name** or **External Record ID**.	
![note icon] **NOTE:** • *Enter an asterisk (*) before and after the search term to generate multiple results.* • *Using the **Browse** tab is not recommended because Smartsheets have a limited number of results that can be displayed, and the number of Product record options may exceed that limit.*	
27. Once the correct Product external record is found, select the record and click the right arrow to move the record to the **Selected** side. Click **OK**.	

28.	Fill in the **Prime Case GTIN**, **Case Pack GTIN**, and **Case Pack GTIN Type** fields _only_ if the case pack(s) have a 14-digit UPCB that is needed by the supplier for shipping purposes.

📢 **IMPORTANT:** The **Product GTIN** should NOT be entered here.

📝 **NOTE:** Change the cell formatting in the **Case Pack GTIN** column cells to **Text** format before entering the Case Pack GTIN(s).

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29. Fill in the rest of the mandatory cells (highlighted blue).

Some cells will have a drop-down list of predetermined options (i.e., Case Pack Buy UoM and Product Origin).

Other cells can be filled with unique values (i.e., Case Pack Description and Initial Case Pack Cost). These cells can be filled will values that are copied from another source and pasted.

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30. Continue scrolling to the right and populate any non-mandatory cells that are applicable to the Case Packs.

📝 **NOTE:** Cells with white backgrounds are optional.

31.	Once all necessary Case Pack information has been entered, validate the information by clicking the **Validate sheet** button.	

32.	The **Validate Smartsheet Contents** window is displayed. Click **OK**.	

33.	The Smartsheet will validate the Case Pack data. When complete, the window will display the results either letting the user know that the products look OK or that errors were found. If errors were found, correct the errors and validate again. **NOTE:** • *Any errors will be highlighted red and must be corrected.* • *Hover your cursor over the red cells to see a textbox explain the error.*	

34. Once the Smartsheet is validated with no errors, save the Smartsheet on your local desktop.	
35. Navigate back to the PIM UI. Click the **Import Smartsheet** hyperlink in the **Links** widget on the home screen.	
36. The **Import Smartsheet** window is displayed. Click **Choose File**.	
37. The **Open** window is displayed. Select the Smartsheet that was just saved and click the **Open** button.	
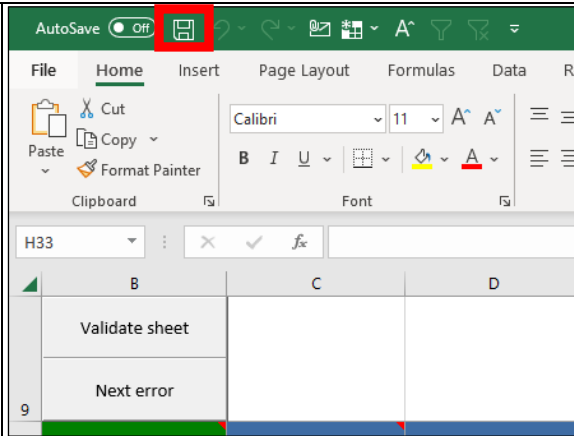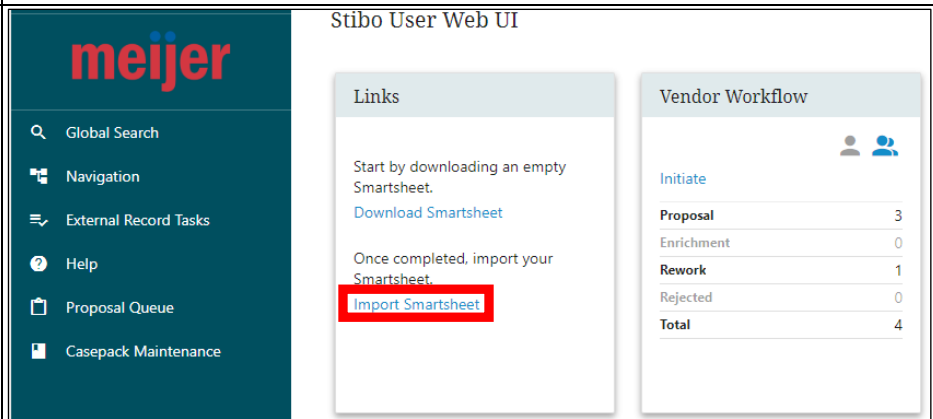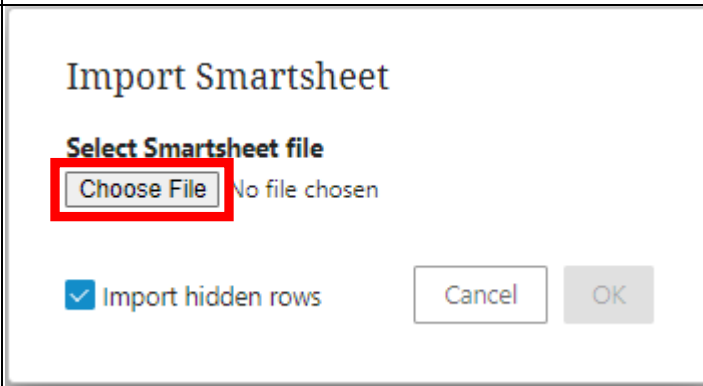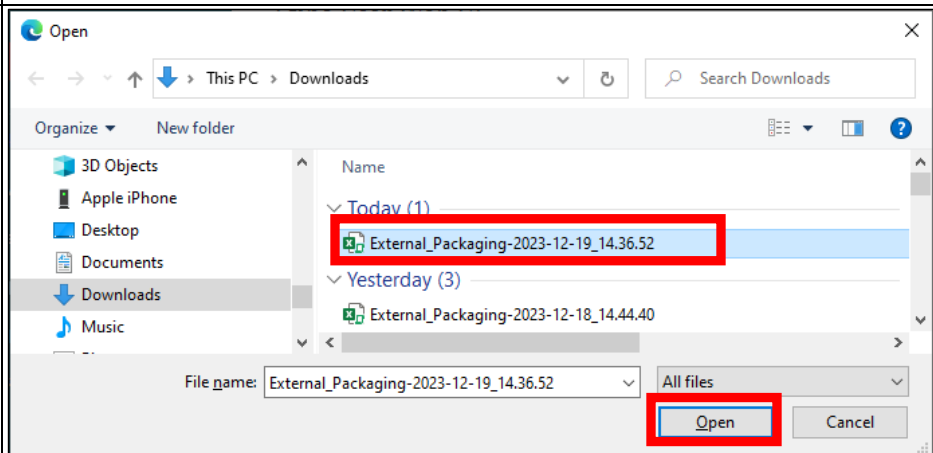
38. Click **OK**.	
39. A notification that the import process has been initiated will appear at the top of the screen briefly with a hyperlink. To see the progress of the importing Smartsheet, click the hyperlink in the notification. Alternatively, click the **Recent Background Processes** button in the upper right corner of the screen next to the Notifications bell and then click the top process hyperlink shown in the **Process List**.	
40. The **Background Process Details** screen is displayed. When the **Status** has updated to say **Succeeded**, the Smartsheet has been imported successfully. *NOTE: The import process into PIM may take several minutes to complete.*	
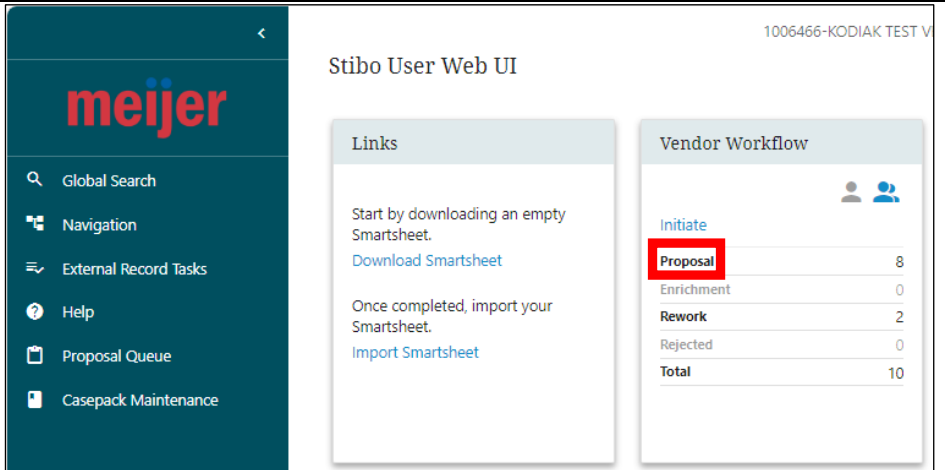
41. Return to the PIM home screen by clicking the **Meijer** icon in the upper left corner. Click **Proposal** in the **Vendor Workflow** widget. **NOTE:** *If the Product records are in the* **Enrichment** *stage of the* **Vendor Workflow***, click* **Enrichment***.*	
42. The **Item in state: Proposal of the WF: External Source Record Handling** screen is displayed. The Case Packs from the imported Smartsheet have been added to the designated Product external records. Click the **External Record IDs** in the **ID** column to open the record for each Product to review or edit as needed.	
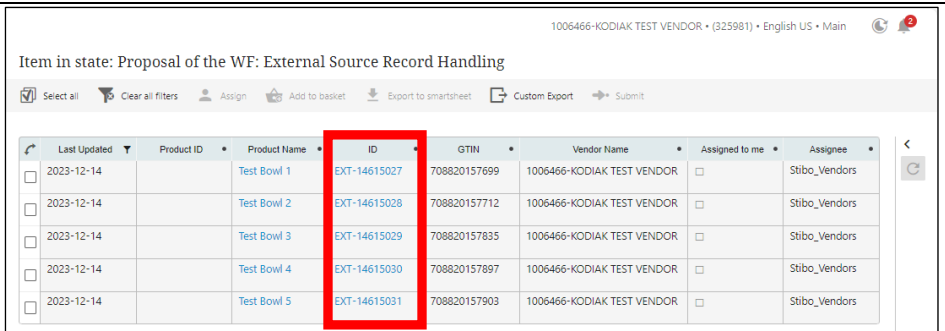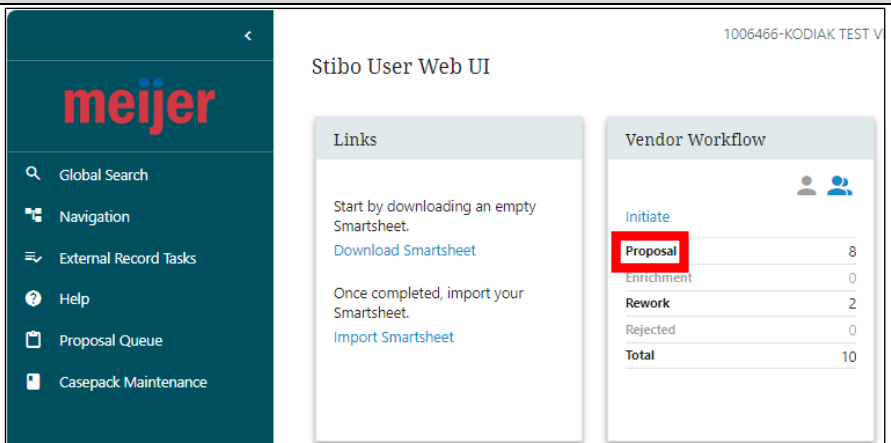
Submit Bulk Product Records in Proposal

1. After the Smartsheet(s) have been imported and all data has been completed and reviewed, navigate to the **Proposal** stage in the **Vendor Workflow** widget.	

2.	The **Item in state: Proposal of the WF: External Source Record Handling** screen is displayed.	
3.	Locate and select the Product external records ready to be submitted.	
4.	Click **Assign**. In the drop-down lists, click **Assign to** > **Me**.	
5.	The records have been assigned.	
6.	Select the Product external records again. Click **Submit**.	

7. The **Submit Properties** window is displayed. Click **OK**. **NOTE:** *You may also choose to add a message for the merchant team in the Submit Message textbox.*	**Submit Properties** Submit event Submit Submit message [ ] Cancel OK
8. A success notification is displayed briefly. The Product external records have been submitted for approval. **NOTE:** *The Product records have moved to the **Enrichment** stage of the **Vendor Workflow** where they can still be accessed and edited prior to approval.*	5 of 5 product(s) submitted ✕