

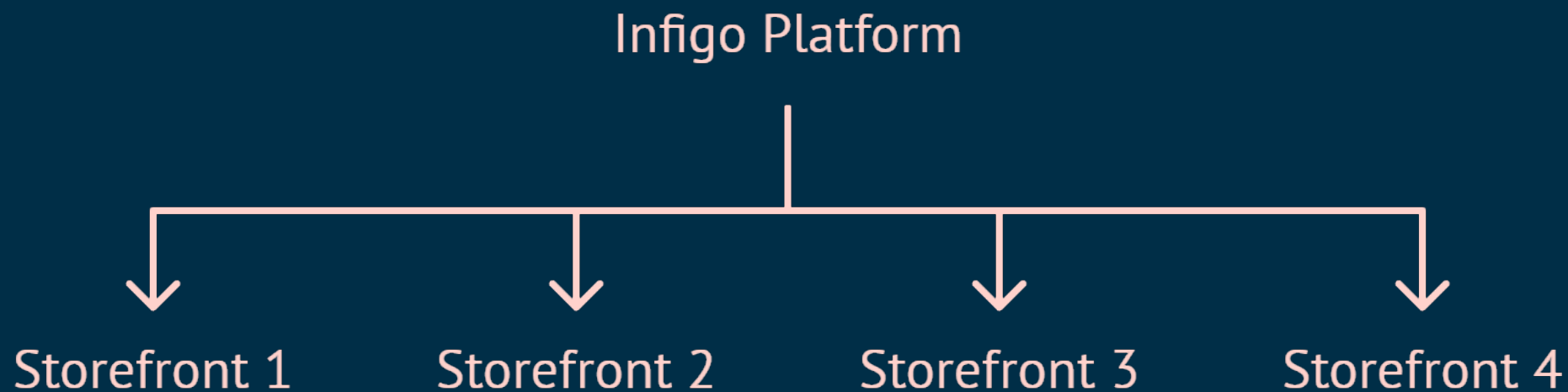


Build Faster: Rapid Multi-Storefront
Setup with Platform Inheritance

1	Welcome & Objectives Introduction to the session and its goals
2	Platforms vs Storefronts Understanding the concept of a global configuration hub
3	Inheritance 101 Learning about default behaviors and inheritance types
4	Advanced Options Exploring options for storefront creation
5	Guidance Tips for safe inheritance usage and limitations
6	Copying Products Methods for copying products across stores
7	Other Bulk Tools Overview of tools for bulk operations



Streamline Storefront Setup with a
“Global Config Hub”



What is this?

- **One storefront does not mean one completely isolated configuration.**
- There are many instances where configuration options inside Infigo storefronts are obtained from the parent platform level.
- For many areas, the Platform level has the ability to act as a “**global configuration hub**” of pre-configured options.

Why is it important?

- Consider how taxing it can be to set up and maintain a high number of storefronts.
- Some storefront configurations could have **a lot** of common configuration elements between them.
- Why not centralise this configuration to reduce your workload when spinning up a new store?

The Benefits of a “Global Config Hub”



Launch Storefronts Fast

Seed new storefronts with a huge range of pre-configured “template” content.



Content Updates

Instantly roll out changes to shared content to multiple storefronts. E.g. footer links, store pages or email copy.



Policy Rollouts

Quickly implement policy changes to all applicable stores. E.g. Password rules, legal notices, and cookie banner text. Platform edit propagates safely.



Multi-brand Networks

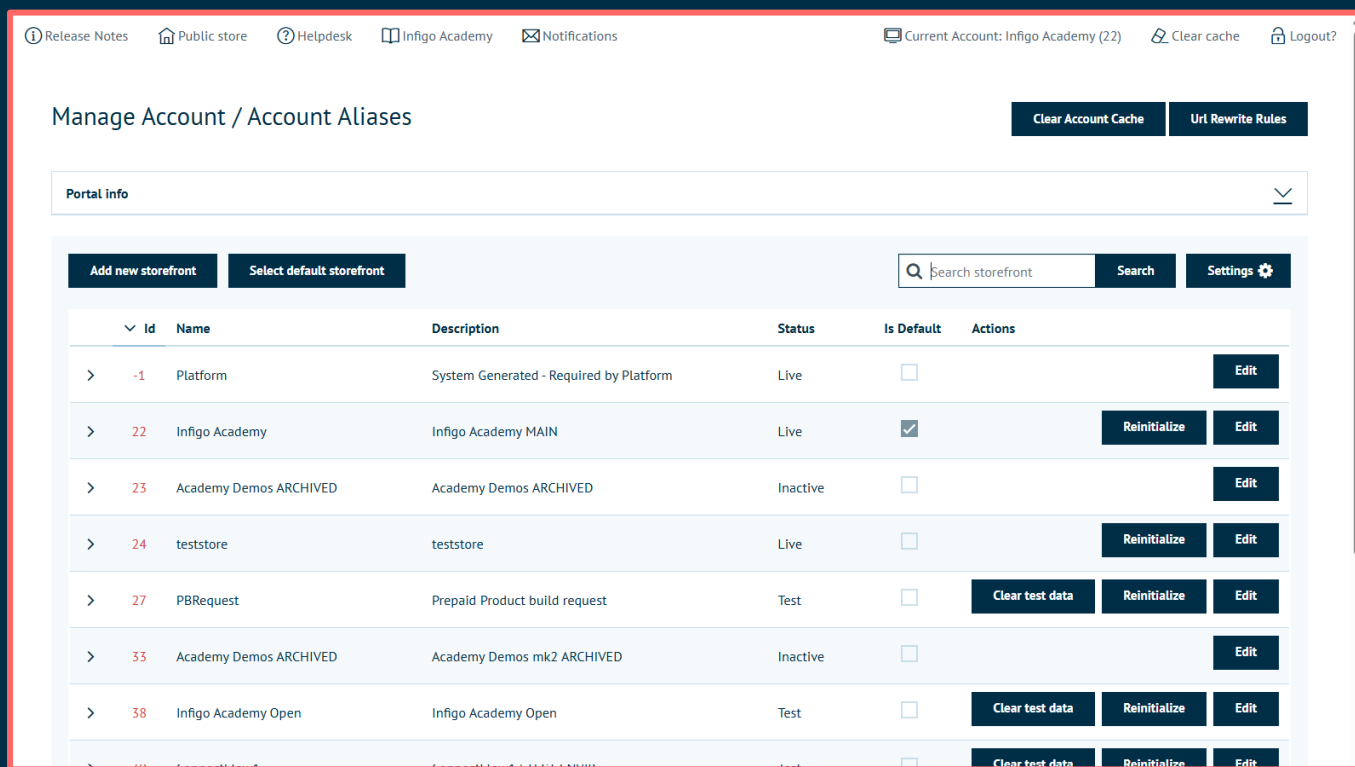
Inherit behaviour, UX, content structures, and transactional copy.
Keep only necessary deviating assets local (such as branding).



Language

Configure default storefront text to propagate to all scores. Local overrides for market-specific phrases, wording or lingo.

- **Sharing of data from Platform to Storefront in Infigo is not a new concept!**
- This has been the default state for a long time.
- We recently added limited additional controls (*shown later*), however these ultimately constitute a minor upgrade to the configurable behaviour.
- By default, storefronts will utilise values taken from the platform where they can.
- Much of what I will discuss today is already in use on your platform and storefronts, but is underutilised!



The screenshot shows the 'Manage Account / Account Aliases' page in the Infigo interface. At the top, there are navigation links: Release Notes, Public store, Helpdesk, Infigo Academy, and Notifications. On the right, it shows the current account as 'Infigo Academy (22)' with links for 'Clear cache' and 'Logout?'. Below the navigation bar, there are two buttons: 'Clear Account Cache' and 'Url Rewrite Rules'. The main section is titled 'Portal info' and contains a search bar and a 'Settings' gear icon. Below this is a table of storefronts with columns: Id, Name, Description, Status, Is Default, and Actions.

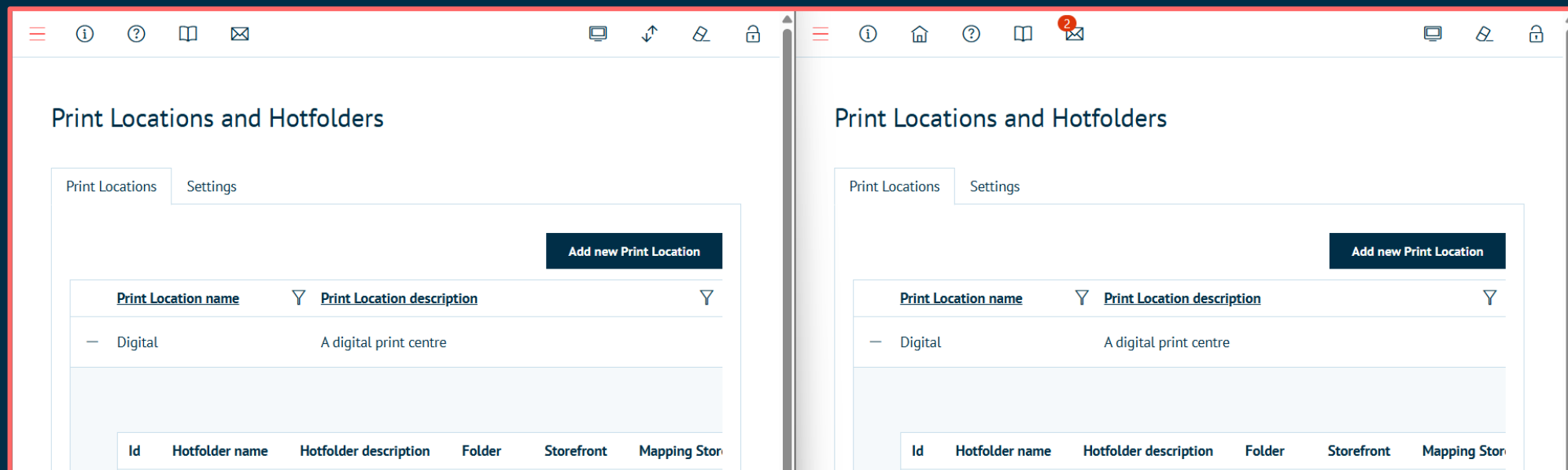
Id	Name	Description	Status	Is Default	Actions
-1	Platform	System Generated - Required by Platform	Live	☐	Edit
22	Infigo Academy	Infigo Academy MAIN	Live	☒	Reinitialize Edit
23	Academy Demos ARCHIVED	Academy Demos ARCHIVED	Inactive	☐	Edit
24	teststore	teststore	Live	☐	Reinitialize Edit
27	PBRequest	Prepaid Product build request	Test	☐	Clear test data Reinitialize Edit
33	Academy Demos ARCHIVED	Academy Demos mk2 ARCHIVED	Inactive	☐	Edit
38	Infigo Academy Open	Infigo Academy Open	Test	☐	Clear test data Reinitialize Edit

This webinar will contain numerous demonstrations within Infigo. Some configuration has been carried out prior to the webinar in order to make the demonstrations go a little smoother (hopefully!)

Setup done prior to the webinar consists of:

- Apply various configuration options to the platform level of the “Training” platform (covering many major areas of Infigo)
- Create a new storefront which is utilising those pre-configured options wherever possible.

Where possible, demonstrations will consist of a side-by-side comparison of platform and storefront levels.



- Areas of configuration in Infigo generally fall into **three major “buckets”**.
- There are **no steadfast rules** as to which parts of the software fit into which bucket, as it has often been driven by specific developments over the years, but there are common trends.
- We’ll shortly go into examples of configuration fitting into each of these areas.



Inheritable

Settings that can be inherited from the platform but can also be overridden locally.



Local Only

Config areas which are only ever set up on individual storefronts.



Platform Controlled

Settings that are controlled by the platform and cannot be changed locally (if platform created)

- If initially created on the platform, some areas of Infigo will be unable to be modified on individual storefronts.
- If you wish to modify these, you must return to the platform to do so (which will impact all storefront that use them).
- These platform created entities cannot be localized.
- *These options can often have local entities manually created.*



Inheritable

Settings that can be inherited from the platform but can also be overridden locally.



Local Only

Config areas which are only ever set up on individual storefronts.



Platform Controlled

Settings that are controlled by the platform and cannot be changed locally (if platform created)

Examples of Platform controlled config:

- Customer Roles
- Email Accounts
- Custom Content Templates
- Delivery Methods
- Template Sets
- Print Locations and Hot Folders
- Tax Categories

Note: This does not constitute a complete list!



Inheritable

Settings that can be inherited from the platform but can also be overridden locally.



Local Only

Config areas which are only ever set up on individual storefronts.



Platform Controlled

Settings that are controlled by the platform and cannot be changed locally (if platform created)

- “Local Only” areas of Infigo usually aren’t associated with the Platform level.
- These constitute mostly unique areas of storefronts, such as product catalogues or customer databases where sharing data doesn’t generally apply.
- Local only config commonly applies where you can have multiple of the element on a single storefront.
- These will always be controlled on individual storefronts.



Inheritable

Settings that can be inherited from the platform but can also be overridden locally.



Local Only

Config areas which are only ever set up on individual storefronts.



Platform Controlled

Settings that are controlled by the platform and cannot be changed locally (if platform created)

Examples of Local Only config:

- Products
- Customers
- Address Books
- Attributes
- Categories
- Departments
- Discounts
- Orders
- Delivery Computation Shipping by Weight (Tiers)
- Suppliers
- Payment Methods (Selection)
- Appearance Settings
- Access Permissions (Scopes / Targets / Rules)

Note: This does not constitute a full list!



Inheritable

Settings that can be inherited from the platform but can also be overridden locally.



Local Only

Config areas which are only ever set up on individual storefronts.



Platform Controlled

Settings that are controlled by the platform and cannot be changed locally (if platform created)

- Many config options on a storefront have the ability to be either **Inherited** (reading the Platform value) or **Local** (owned by the storefront).
- **Inherited** entries **update** when the Platform changes.
- **Local** entries **do not update**.
- These config areas can be either Inherited or Local.
 - Bulk override options exist upon storefront creation (more on this later).
 - **Individual settings / elements modified on storefront level will become local.**



Inheritable

Settings that can be inherited from the platform but can also be overridden locally.



Local Only

Config areas which are only ever set up on individual storefronts.



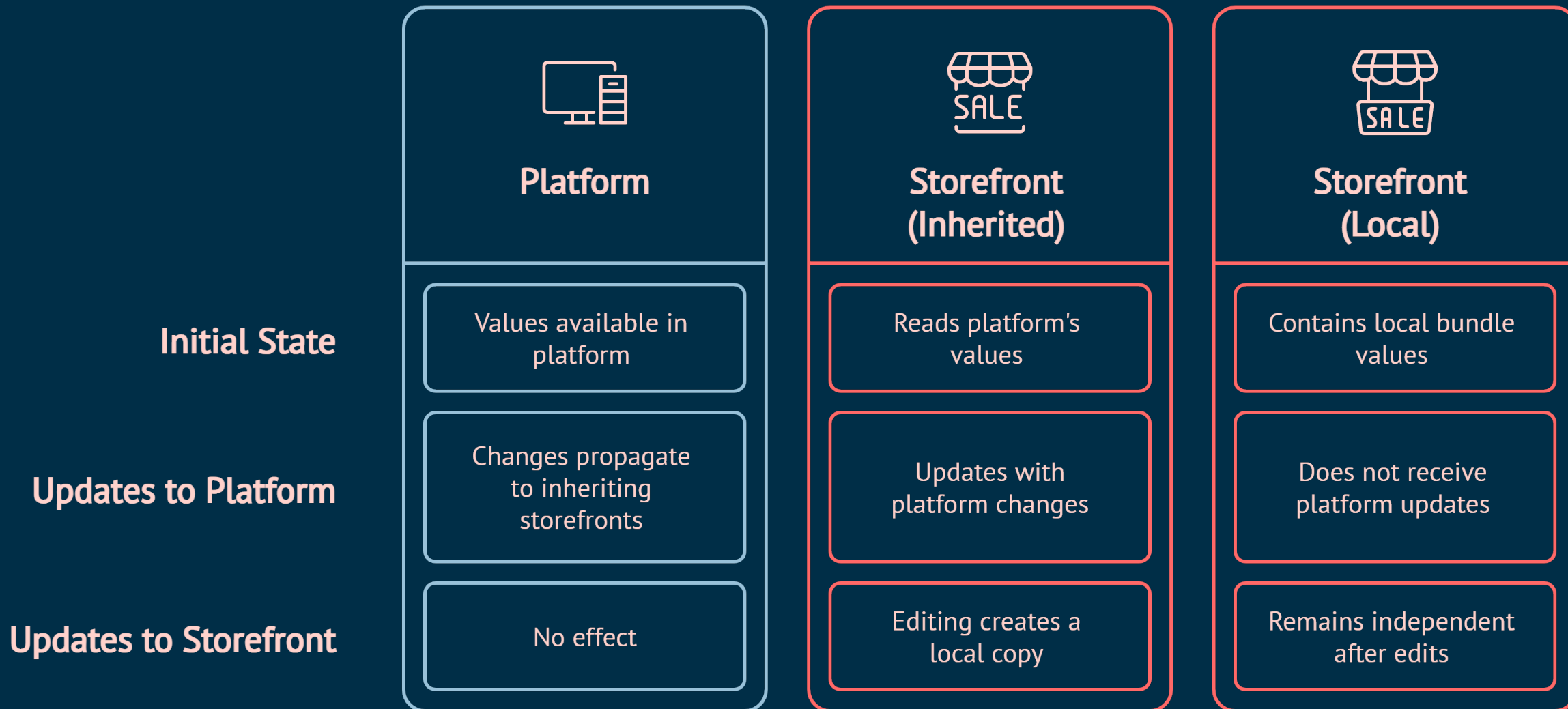
Platform Controlled

Settings that are controlled by the platform and cannot be changed locally (if platform created)

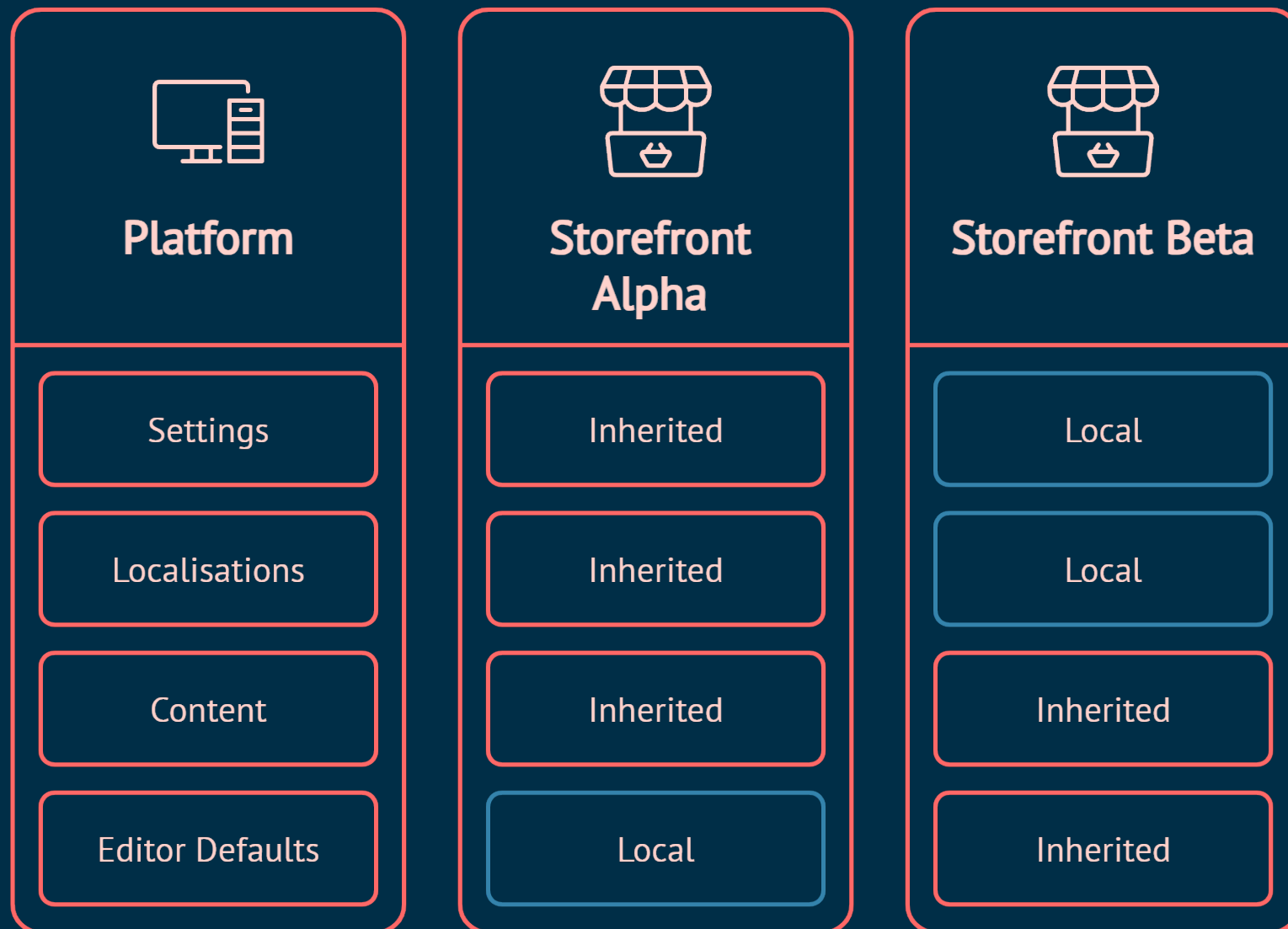
- This shows a list of areas inside Infigo which can be considered inheritable from platform to storefront.
- *Please note: This does not constitute a complete list!*

Inheritable Settings

- All "Settings" Pages (with some exceptions)
- Language Strings
- Editable Content Blocks (Defaults)
- Content Pages
- CSS Override
- Email Message Templates
- Connect Settings
- Connect plugin configurations / credentials
- MegaEdit Product Defaults
- Delivery Computation (Provider Selection)
- Delivery Computation Providers (eg Fedex)
- Delivery Computation Fixed Rate (Rates)
- Payment Provider Plugins (eg Stripe)
- Tax Provider (Rates)
- Reward Points



- Representative diagram showing information specified at the platform level, then how two separate storefronts are using this information.
- Storefront Alpha and Storefront Beta have separate setups.
- Some settings have been made local in each storefront (where individual customization is required) with inherited values used where the platform “default” is applicable.



Create new storefront

Store Info

Advanced Options

Standard

Select what resources should override platform level configuration

?

Settings

?

Localizations

?

Editable Content & Content pages

?

Default Dynamic Product Config

Create

Cancel

- Tab labeled **Advanced Options** available on the **Create Storefront** dialog. Contains several toggles.
- Purpose of each toggle is to **select groups of config options which should have inherited or local values**.
- Feature is off by default. Request via support ticket if you would like this enabled.

What's included in each of these groups?

Broadly speaking, each category consists of the following (although there are usually exceptions)

- Settings
 - All inputs within “Settings” pages
- Localisations
 - Language strings
- Editable Content and Content Pages
 - Editable content blocks
 - Customised content pages (such as “About Us”)
 - Email templates
- Default Dynamic Product Config
 - Defined default values for MegaEdit products

Create new storefront

Store Info

Advanced Options

Standard

Select what resources should override platform level configuration

?

Settings

?

Localizations

?

Editable Content & Content pages

?

Default Dynamic Product Config

Create

Cancel



Inheritance | Advanced Options

Toggle meanings

- ON | Local
 - Writes local default bundled values into the new storefront for that category of config.
 - These config options are Local on day one.
 - Future Platform changes do not flow to those local entries.
- OFF | Inherit
 - Config options remain Inherited and follow Platform changes
 - Manual alteration on the storefront will convert the option to local.

A screenshot of a web application dialog box titled 'Create new storefront'. The dialog has a close button (X) in the top right corner. It features two tabs: 'Store Info' and 'Advanced Options', with 'Advanced Options' being the active tab. Under the 'Standard' heading, there is a sub-heading 'Select what resources should override platform level configuration'. Below this, there are four toggleable options, each with a question mark icon to its left and a toggle switch to its right. All four toggle switches are currently turned on (to the right). The options are: 'Settings', 'Localizations', 'Editable Content & Content pages', and 'Default Dynamic Product Config'. At the bottom of the dialog, there are two buttons: a green 'Create' button and a dark blue 'Cancel' button.



Knowledge Base

Currently no comprehensive list to understand which individual entries are able to be inherited



Current State

No UI options to see whether a specific entry is currently local or inherited on a storefront



Reversion

Once a local entry is defined, currently no available UI option to revert to inherited



“Global Config” Guidance for New Storefronts

For multiple storefronts which utilize much of the same config:

- Consider creating and utilising a “template” configuration on your platform level.
- Use this template to seed any new storefront you create, giving you an instant head start to the configuration of your new storefront.

For unique storefronts:

- Inheritance could have the effect of causing more problems than it solves as you will have to clear out prepopulated config.
- Request access to the Advanced Options toggles.
- Ensure local values are created immediately upon storefront creation to prevent inheritance in key areas.

A screenshot of a web application dialog box titled "Create new storefront". The dialog has a close button (X) in the top right corner. It features two tabs: "Store Info" and "Advanced Options", with "Advanced Options" currently selected. Under the "Advanced Options" tab, there is a section titled "Standard" with the instruction "Select what resources should override platform level configuration". Below this instruction are four toggle switches, each preceded by a question mark icon. The toggles are labeled: "Settings", "Localizations", "Editable Content & Content pages", and "Default Dynamic Product Config". All four toggle switches are currently turned on. At the bottom of the dialog, there are two buttons: a green "Create" button and a dark blue "Cancel" button.



“Global Config” Guidance for Existing Storefronts

Existing stores will be inheriting values from the platform by default

Remember, inheritance is not new and is the default!

- Be careful if looking to implement a “template” platform configuration with existing stores, as inheriting settings could unexpectedly change behaviour if config propagates to your live storefronts.
- Before updating platform config, confirm whether changes are likely to have an impact on your existing stores
 - Have inputs already been added directly to the storefront (meaning entries are now localised?)
 - Will the existing stores be impacted by proposed platform changes?
 - Should I ensure all related storefront settings are localized before implementing platform level change?

Release Notes Public store Helpdesk Infigo Academy Notifications

Manage Account / Account Aliases

Portal info

Add new storefront Select default storefront

Id	Name	Description
> -1	Platform	System Generated - Required
> 22	Infigo Academy	Infigo Academy MAIN
> 23	Academy Demos ARCHIVED	Academy Demos ARCHIVED
> 24	teststore	teststore
> 27	PBRequest	Prepaid Product build request
> 33	Academy Demos ARCHIVED	Academy Demos mk2 ARCHIVED
> 38	Infigo Academy Open	Infigo Academy Open



Copying Products





Copying Products Between Storefronts

- Infigo provides the ability to copy existing products, massively reducing setup time for new products with similarities to products you have already produced.
- Copying a product to the same storefront has long been available.
- We have recently introduced the ability to copy between storefronts.





Copying a Product on a Single Storefront

Commonly known and long-standing, Infigo has the ability to quickly copy a product and all associated assets within the same storefront.

Create a carbon copy of your fully configured product.

Copy from within a products “Product Details” page on the admin area.

The screenshot displays the Infigo admin interface. The top section shows the 'Edit product details' page for 'PrefixToName_50mm Circular Label Batch Creation'. A 'Copy product' button is highlighted in the top right corner. Below this, a 'Copy product' dialog box is open, showing options to copy the product name, published status, images, and extended data. The 'New product name' field is set to '50mm Circular Label Batch Creation'. The 'Copy product' button in the dialog is highlighted.

The bottom section shows the 'Product list' table. The table has columns for Picture, Id, Name, Price, Type, SKU, Stock, Group, Variant, Published, and Actions. The table lists several products, including '50mm Circular Label Batch C...', '50mm Circular Label Upload ...', 'Business Card Template | In...', 'Copy of Business Card Templ...', and 'Invent | Advanced Grouping ...'. The 'Copy product' button is highlighted in the top right corner of the table.

Picture	Id	Name	Price	Type	SKU	Stock	Group	Variant	Published	Actions
	2559	50mm Circular Label Batch C...	0	MegaEdit	-	No Stock	-	Go to Variant	✓	Copy Edit
	2560	50mm Circular Label Upload ...	0.15	MegaEdit	-	No Stock	-	Go to Variant	✓	Copy Edit
	2558	Business Card Template In...	0	MegaEdit	-	No Stock	-	Go to Variant	✓	Copy Edit
	2563	Copy of Business Card Templ...	0	MegaEdit	-	No Stock	-	Go to Variant	✓	Copy Edit
	2562	Invent Advanced Grouping ...	0	MegaEdit	-	No Stock	-	Go to Variant	✓	Copy Edit



Copying a Single Product Between Storefronts

Newly released functionality. Copy a product and all associated elements / assets to a different storefront on the same platform.

Enter a completely new product name and choose whether to include certain elements.

Select a product within Product Management and select to copy within the Actions dropdown.

Product Management

Product Name or SKU

Advanced search

☐	Picture	Id	Name	Price	Type	SKU	Stock	Group	Variant	Published
☒		2566	PrefixToName_50mm Circular ...	0	MegaEdit	-	No Stock	-	Go to Variant	☒

PrefixToName Business Card No

-
-
-
-
-
-
-
-
-
-

Product Management

Product Name or SKU

Advanced search

☐	Picture	Id	Name	Price	Type	SKU	Stock	Group	Variant	Published	Actions
☐		2559	50mm Circular Label Batch C...	0	MegaEdit	-	No Stock	-	Go to Variant	☒	Copy Edit
☐		2560	50mm Circular Label Upload ...	0.15	MegaEdit	-	No Stock	-	Go to Variant	☒	Copy Edit
☐		2558	Business Card Template In...	0	MegaEdit	-	No Stock	-	Go to Variant	☒	Copy Edit
☐		2565	Copied Product 1	0	MegaEdit	-	No Stock	-	Go to Variant	☒	Copy Edit
☐		2563	Copy of Business Card Templ...	0	MegaEdit	-	No Stock	-	Go to Variant	☒	Copy Edit



Copying Multiple Products Between Storefronts

Newly released functionality. Copy multiple (up to 500 at a time) product and all associated elements / assets to a different storefront on the same platform.

Enter a prefix to all existing product names and choose whether to include certain elements.

Select a product within Product Management and select to copy within the Actions dropdown.

The screenshot displays the 'Product Management' interface. At the top, there is a search bar labeled 'Product Name or SKU' and buttons for 'Add new', 'Product Data', and 'Action'. Below the search bar is an 'Advanced search' section. The main table lists products with columns: Picture, Id, Name, Price, Type, SKU, Stock, Group, Variant, Published, and Actions. Two products are selected, indicated by checkboxes in the 'Picture' column. The 'Actions' dropdown menu is open, showing options: Publish, Unpublish, Copy products (Selected), Delete (All found), and Delete (Selected). The 'Copy products (Selected)' option is highlighted. Below the table, there is a sidebar with navigation links: Insights, Sales, Catalogue, Customers, Promotions, Content Management, Configuration, System, and Shared Print Operations (SPO). The bottom of the interface shows a 'Switch Storefront' button, 'Clear cache', and 'Logout?'.

Picture	Id	Name	Price	Type	SKU	Stock	Group	Variant	Published	Actions
☒	2566	PrefixToName_50mm Circular ...	0	MegaEdit	-	No Stock	-	Go to Variant	✗	
☒	2577	PrefixToName_Business Card ...	0	MegaEdit	-	No Stock	-	Go to Variant	✗	

Picture	Id	Name	Price	Type	SKU	Stock	Group	Variant	Published	Actions
☐	2559	50mm Circular Label Batch C...	0	MegaEdit	-	No Stock	-	Go to Variant	✓	
☐	2560	50mm Circular Label Upload ...	0.15	MegaEdit	-	No Stock	-	Go to Variant	✓	
☐	2558	Business Card Template In...	0	MegaEdit	-	No Stock	-	Go to Variant	✓	
☐	2565	Copied Product 1	0	MegaEdit	-	No Stock	-	Go to Variant	✗	
☐	2563	Copy of Business Card Templ...	0	MegaEdit	-	No Stock	-	Go to Variant	✓	

Which Product Related Elements are Copied?

Core Product

Title, descriptions, content template, specs, display settings, images.



Pricing & Stock

Base price, tiered pricing, stock settings/levels.



Discounts

Product-level discount assignments.



Static PDF

Configured PDF file comes across and remains attached.



MegaEdit / Invent

All MegaEdit resources, active scripts, attached MEX file and associated functionality / resources.



Categories

Category mapping and full structure.



Tax & Delivery

Applied tax categories; delivery enabled state and additional fees.



Attributes

Product attributes (e.g., text areas, dropdowns with options).



Multi-Part Products

Fully detailed config, additional settings on config page.



EXCEPTIONS

Some exceptions do exist, so check carefully!
E.g. - Pitstop profiles, downloadable product files, related products, certain 3D or editor plugin configs, pricing scripts.



Other Bulk Tools for Rapid Storefront
Builds



Bulk Tools | Product Import & Export (CSV)

Why: Create/update catalogue at scale from one spreadsheet.

Where: Catalogue → Products → Product Management → **Export to Excel / Import from Excel.**

How: Export full or partial product list → bulk-edit (prices, descriptions, attributes) → add new rows for new items → **keep ProductID to update, leave blank to create** → (optional) add columns for images/downloads/attributes and link to an **Upload Folder.**

Tips: Use a fresh export for current headers; don't change ProductID; ensure files exist in the referenced upload folder.

Import products

Excel file: Click to upload

Upload location: None

Allow any value for specification attribute: ☐

Generate missing product tags: ☐

Imported products are distinguished by Product Id. If the Product Id already exists, then its corresponding product will be updated.

You can import Specification Attributes, Product Tags, and Connect Configurations.

To create product attributes, add the optional column ProductAttributes to the data.

The row contains semicolon-separated product attribute names for which predefined product attribute values exist. The import will create them as dropdown attributes.

The optional upload location can be used to provide external assets which can be referenced within the spreadsheet by relative file path. After successful import, the asset will be removed from the upload location.

A column named "ProductAsset" can be used to provide the supported files:

- Static PDF Products: a normal PDF
- Infigo Products: a variable PDF template
- MegaEdit Products: an InDesign plugin export

A column named "ProductImage" can be used to provide a new product image. Any existing product image will be deleted first before the new image is being used!

You can provide downloadable files through specific columns in the CSV file. These columns are designed to handle both regular and sample downloadable files.

There are two types of columns you can use:

1. URL Columns: **"DownloadUrl"**: Use this column to provide a direct URL to the downloadable file. **"SampleDownloadUrl"**: Use this column to provide a direct URL to the sample downloadable file.
2. Asset Columns: **"DownloadAsset"**: Use this column to specify the relative file location from the upload location for the downloadable file. **"SampleDownloadAsset"**: Use this column to specify the relative file location from the upload location for the sample downloadable file.



Bulk Tools | Customer CSV Bulk Import

Why: Create or update hundreds of customers in minutes.

Where: Customers → Customer Management → CSV import.

How: Download sample CSV → populate → import. Import creates if no match; updates if email/username matches (per storefront settings).

Tips: CSV headers are case-sensitive; required Registration fields must be present; Departments must pre-exist and match names exactly; error rows are returned in an error CSV

The screenshot shows a modal dialog titled "Customer import options" with a close button (X) in the top right corner. The dialog contains the following fields and options:

- Csv file:** A text input field followed by a button with an upload icon and the text "Choose a file..."
- Create main address:** A checkbox.
- Address book handling:** A dropdown menu with the selected option "Delete and Create new addresses".
- Current Budget Handling:** A dropdown menu with the selected option "Ignore Current Budget".

At the bottom of the dialog are two buttons: "Import" and "Cancel".

Below the dialog, a footer note reads: "Full name of the user (You can only provide this column, and FirstName and LastName columns will be..."



Bulk Tools | Address Books & Addresses

Why: Seed address books and addresses without manual entry.

Where: Customers → Address Books → Export (books/addresses) → Import.

How: Export to get a template → add rows → re-import to create books and addresses. When importing addresses, provide either Address Book ID or Name. Same address can live in multiple books (add multiple rows).

Tips: Address fields must not contain commas (CSV is comma-delimited); duplicates are flagged in a returned error CSV.

Address Book Management

[Add](#)[↓ Export address books](#)[↑ Import address books](#)[↑ Import address book addresses](#)



Bulk Tools | Access Permissions – CSV import (Scopes/Targets/Rules)

Why: Mass-create complex permission matrices fast.

Where: Access Permissions → Export (scopes/targets/rules) → edit CSV → Import.

How: Export to a populated template → add new rows for departments/products/customers leaving ID blank so the platform auto-assigns → re-import to create rules in bulk.

Tip: Use when many customers × categories/products combinations would be tedious in UI.

Manage Advanced Rules

Save

Scopes

Targets

Rule Groups

Access Permissions

Stock Management

Import

Export

Delete all

Add new scope

<u>Id</u>	<u>Scope Name</u>	Actions
No records to display.		



Bulk Tools | Content Templates (Standard & Custom)

Why: Build consistent pages fast; scale layout changes.

Standard: No-code “building blocks” for content/pages; great for non-dev admins.

Custom: Developer supplies HTML/CSS/JS + fields and repeaters so admins fill content without touching code; specify where the template is available (e.g., product pages vs content pages).

Tips: The Content Templates tab may need enabling by Support; Custom coding in custom templates aren’t covered under general support.

HTML Markup

1

`%Resource.Template.TopicPageFix%`

2

3

`<section`

4

`class="section is-medium has-vertical-padding has-background-default has-text-default "`

5

6

`>`

7

`<div class="container content is-flex">`

8

`<div class="columns is-multiline is-mobile is-variable is-4 is-vcentered is-justify-content-center`

9

`%Columns_Custom_Classes%">`

10

11

`<div class="column is-12 ">`

12

13

`<div`

14

`class="ict-accordion block has-text-inherit " data-accordion-behaviour="single-item" >`

Fields

Name	Type	Placeholder	Order
> AccordionRepeat	Repeater	%AccordionRepeat%	0
> Text Test	Textbox	%Text_Test%	1

Add new field



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