



User Manual

For

CSV Import Export Cartridge For B2C Commerce



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DOCUMENT OBJECTIVE

This document aims to guide users through the installation, configuration, and usage of the CSV Import Export cartridge within Salesforce B2C Commerce Business Manager. It provides clear instructions for installing the cartridge and its Business Manager dependencies and how to use the functionalities to import and export Catalog products, Inventory, Pricebooks, Customers, Orders, and Custom Objects in CSV format.

CARTRIDGE OVERVIEW

The CSV Import Export cartridge provides a user-friendly interface within Salesforce Commerce Cloud (SFCC) Business Manager for seamless import and export of catalog products, Inventory, Pricebooks, Customers, Orders, and custom objects.

KEY FEATURES

- **CSV Import/Export (Catalog Products, specific products, Inventory, and PriceBooks):** Allows users to efficiently manage product data, inventory, and pricing information through CSV files. This feature supports both standard and custom product attributes, enabling comprehensive bulk operations.
 - **Catalog Products:** Import and export entire product catalogs, including all necessary attributes for bulk creation and updates.
 - **Specific Products:** Target specific products for selective import/export, allowing for precise updates without altering the whole catalog.
 - **Inventory:** Manage stock levels and warehouse data through CSV files, ensuring accurate and up-to-date inventory records.
 - **PriceBooks:** Import and export detailed pricing information, supporting various pricing structures, currencies, and regions.
- **CSV Import/Export (Custom Objects):** Extends import functionality to custom objects defined within the SFCC instance, providing flexibility in data management and enabling users to extract data from custom objects into CSV format, supporting data backup or external use.
- **CSV Import/Export (Customers):** It allows users to directly import and export customer data using CSV files. This feature supports bulk operations, making it efficient to manage large volumes of customer information.
- **CSV Export (Orders):** Allows users to export orders into CSV format.

INSTALLATION GUIDE

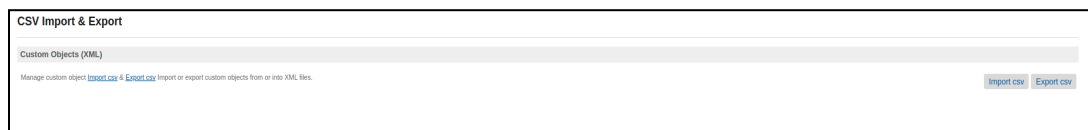
- Clone the cartridge into your project folder and install the dependencies by running the “npm install” command in the root directory of the cartridge.
- Upload the cartridge to your active code version
- Add the Cartridge to your BM cartridge path under Administration > Sites > Manage Sites > Business Manager - Settings
- Import the metadata provided in the “meta” folder in the root directory of the cartridge.
- Update BM roles permissions to allow the users to access the functionality of CSV import Export.

HOW TO USE

Once you have completed the cartridge installation steps, you will see a new option titled 'CSV Import & Export' in the Merchant Tools section. This option will be available under Custom Objects, Customers, Ordering and Products & Catalogs.

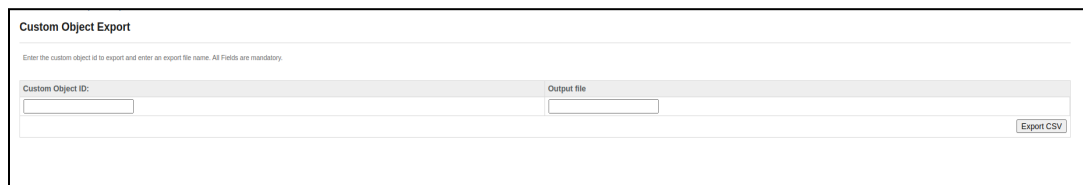
Custom Object Import Export

- Go to Merchant Tools > Custom Objects > CSV Import & Export
- You will see the following screen, here you can choose the import or export operation you want to perform



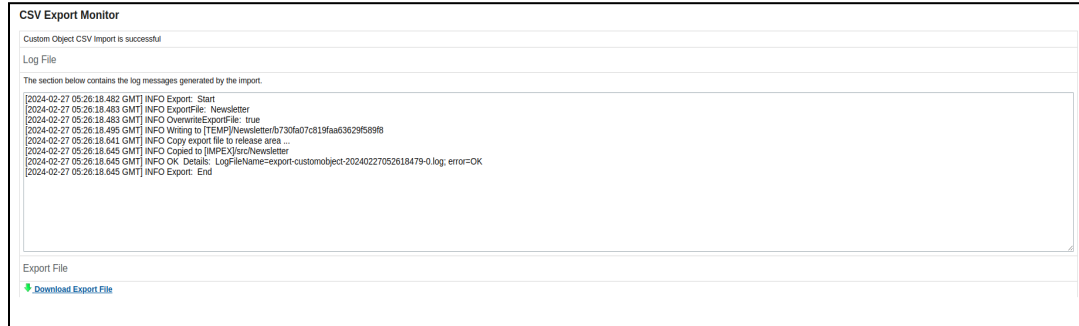
The screenshot shows the 'CSV Import & Export' interface. At the top, it says 'Custom Objects (XML)'. Below that, there is a description: 'Manage custom object [import.csv](#) & [Export.csv](#) import or export custom objects from or into XML files.' At the bottom right, there are two buttons: 'Import csv' and 'Export csv'.

- **Export Custom Objects**
 - To export custom objects in csv format, click on the export button and it will take you to the export page, refer to the screenshot attached below



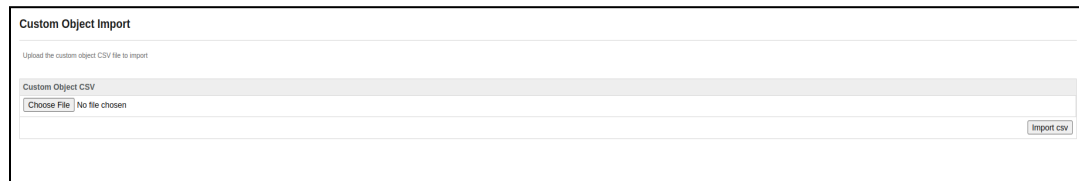
The screenshot shows the 'Custom Object Export' interface. At the top, it says 'Custom Object Export'. Below that, there is a note: 'Enter the custom object id to export and enter an export file name. All fields are mandatory.' There are two input fields: 'Custom Object ID:' and 'Output file'. At the bottom right, there is a button labeled 'Export CSV'.

- On the export page, there will be two inputs, in the first one you need to key in the custom object ID, and in the second one you need to name the export file.
- After you click the export button, you will see the final screen showing the success or error logs and the export csv file to be downloaded.



- **Import Custom Objects**

- To import custom objects in csv format, click on the import button and it will take you to the import page, refer to the screenshot attached below

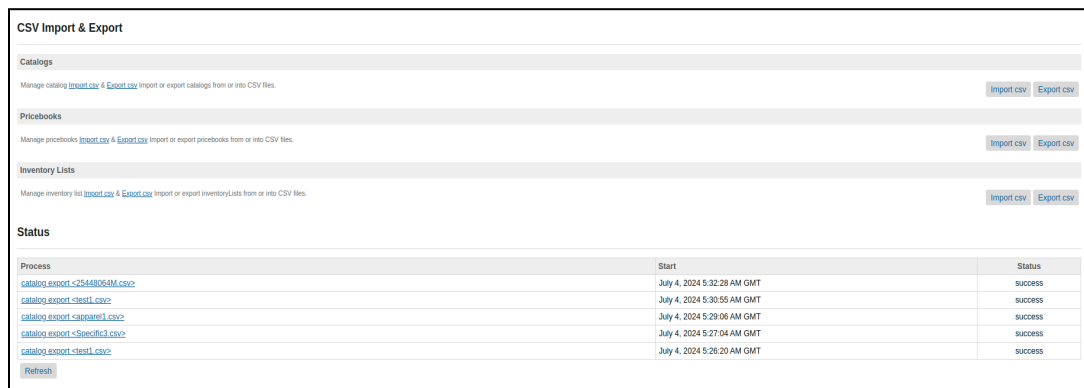


- Here upload the properly formatted csv file (Check the CSV format section) you want to import and click on the import button, it will take you to the final screen showing the success or error logs, refer to the screenshot attached below



Catalog, Pricebook & Inventory Import Export

- Go to Merchant Tools > Products and Catalogs > CSV Import & Export
- You will see the following screen, here you can choose the import or export operation you want to perform and the last 5 import & export operations.
- Here you can perform new import or export operations or check the status of previous operations and download the previously exported files.



CSV Import & Export

Catalogs
Manage catalog [Import csv](#) [Export csv](#) Import or export catalogs from or into CSV files.

Pricebooks
Manage pricebooks [Import csv](#) [Export csv](#) Import or export pricebooks from or into CSV files.

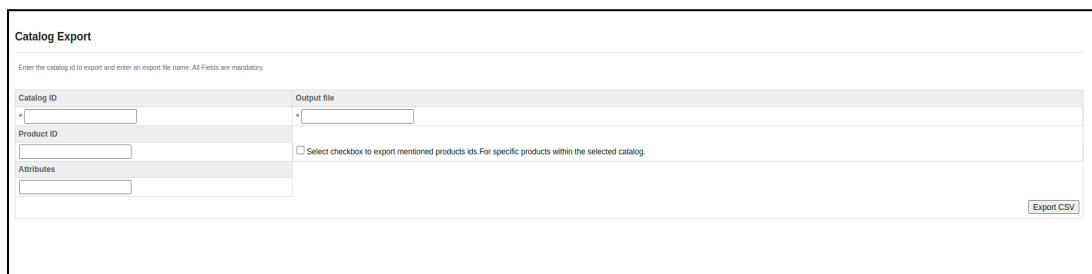
Inventory Lists
Manage inventory list [Import csv](#) [Export csv](#) Import or export inventory lists from or into CSV files.

Status

Process	Start	Status
catalog export -c5448054M.csv	July 4, 2024 5:32:28 AM GMT	success
catalog export -test1.csv	July 4, 2024 5:30:55 AM GMT	success
catalog export -sample1.csv	July 4, 2024 5:29:06 AM GMT	success
catalog export -Specific3.csv	July 4, 2024 5:27:04 AM GMT	success
catalog export -test1.csv	July 4, 2024 5:26:20 AM GMT	success

[Refresh](#)

- **Export Catalog**
 - To export catalog products in csv format, click on the export button and it will take you to the export page, refer to the screenshot attached below



Catalog Export

Enter the catalog id to export and enter an export file name. All fields are mandatory.

Catalog ID:

Product ID:

Attributes:

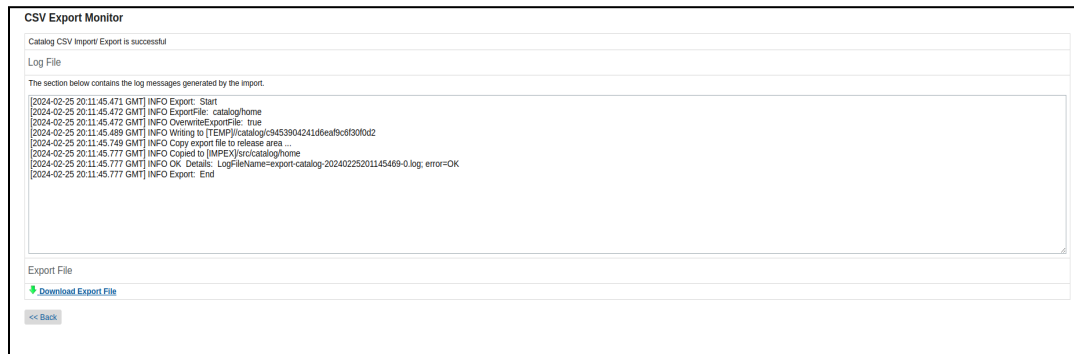
Output file:

☐ Select checkbox to export mentioned products ids. For specific products within the selected catalog.

[Export CSV](#)

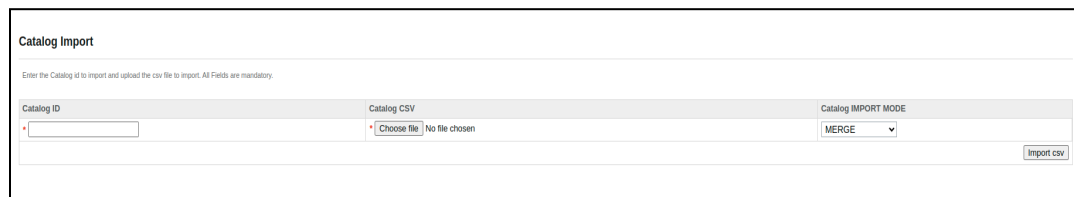
- On the export page, please follow these steps:
 - In the first input field, enter the catalog ID.
 - In the second input field, provide a name for the export file.
 - If you want to export specific products:
 - Enter the product IDs in the third input field.
 - Select the corresponding checkbox.
 - If you want to export specific catalog attributes, enter the desired attribute names in the fourth input field.

- After you click the export button, you will be redirected to the first import/export screen where you can see your operation in the list and its status.
- Once the status is updated from running to success or error, you can click on the operation to check the logs and download the export file.

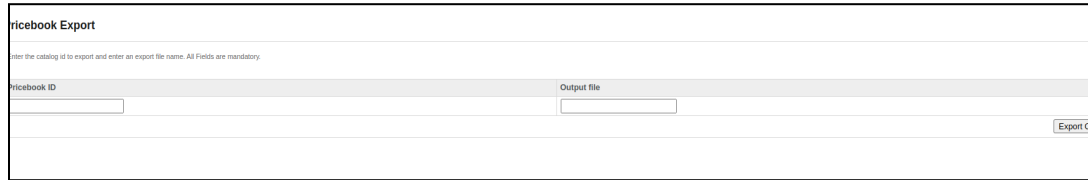


- **Import Catalog**

- To import the catalog from a CSV file, click on the import button and it will take you to the import page, refer to the screenshot attached below



- On the import page, there will be two inputs, in the first one you need to key in the catalog ID, and in the second one you need to upload/choose the properly formatted import file (Check the CSV format section).
 - Select the merge import mode. Modes define what happens to the data at import. These are the modes: Merge, Update, Replace, and delete.
 - After you click the import button, you will be redirected to the first import/export screen where you can see your operation in the list and its status.
 - Once the status is updated from running to success or error, you can click on the operation to check the logs.
- **Export Pricebook**
 - To export the pricebook in CSV format, click on the export button and it will take you to the export page, refer to the screenshot attached below



Facebook Export

Enter the catalog id to export and enter an export file name. All Fields are mandatory.

Facebook ID	Output file

[Export C](#)

- On the export page, there will be two inputs, in the first one you need to key in the pricebook ID, and in the second one you need to name the export file.
- After you click the export button, you will be redirected to the first import/export screen where you can see your operation in the list and its status.
- Once the status is updated from running to success or error, you can click on the operation to check the logs and download the export file.



CSV Export Monitor

Catalog CSV Import/ Export is successful

Log File

The section below contains the log messages generated by the import.

```

[2024-02-25 20:11:45.471 GMT] INFO Export: Start
[2024-02-25 20:11:45.472 GMT] INFO ExportFile: cataloghome
[2024-02-25 20:11:45.472 GMT] INFO OverrideExportFile: true
[2024-02-25 20:11:45.489 GMT] INFO Writing to [TEMP]\catalog\c9453904241d6eaf9cf8300d2
[2024-02-25 20:11:45.789 GMT] INFO Copy export file to release area ...
[2024-02-25 20:11:45.777 GMT] INFO Copied to [IMPEX]\src\cataloghome
[2024-02-25 20:11:45.777 GMT] INFO OK. Details: LogFileName=export-catalog-20240225201145469-0.log; error=OK
[2024-02-25 20:11:45.777 GMT] INFO Export: End
  
```

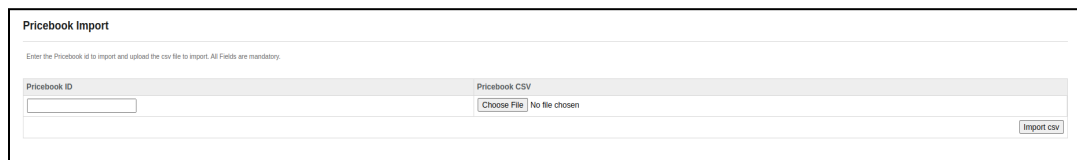
Export File

[Download Export File](#)

[<< Back](#)

• Import Pricebook

- To import the pricebook from a CSV file, click on the import button and it will take you to the import page, refer to the screenshot attached below



Pricebook Import

Enter the Pricebook id to import and upload the csv file to import. All Fields are mandatory.

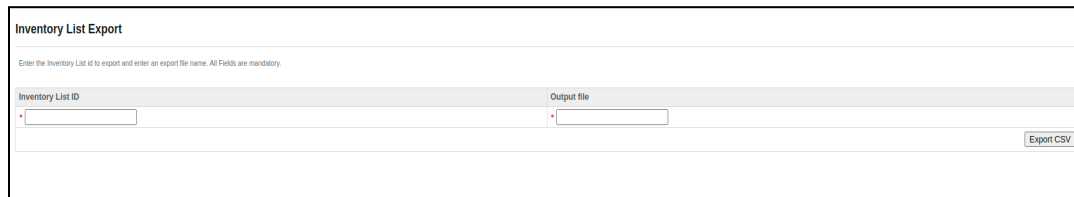
Pricebook ID	Pricebook CSV
	Choose File No file chosen

[Import csv](#)

- On the import page, there will be two inputs, in the first one you need to key in the pricebook ID, and in the second one you need to upload/choose the properly formatted import file (Check the CSV format section).
- After you click the import button, you will be redirected to the first import/export screen where you can see your operation in the list and its status.
- Once the status is updated from running to success or error, you can click on the operation to check the logs.

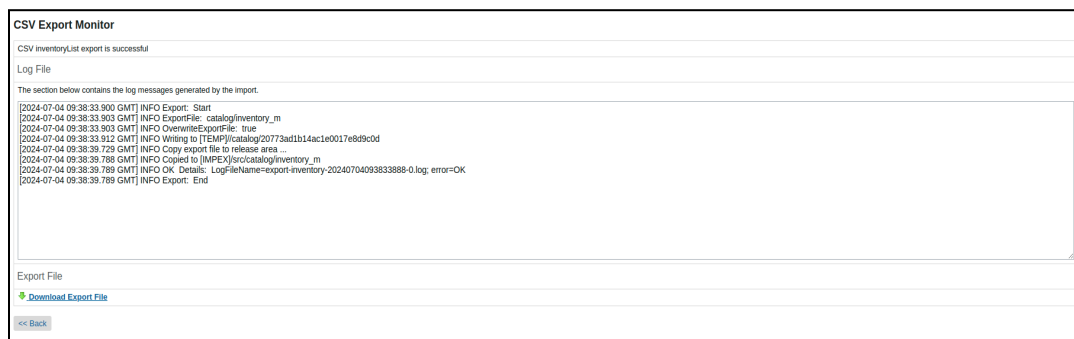
- **Export InventoryList**

- To export the inventory list in CSV format, click on the export button and it will take you to the export page, refer to the screenshot attached below



The screenshot shows the 'Inventory List Export' page. It has a title bar 'Inventory List Export' and a subtitle 'Enter the Inventory List id to export and enter an export file name. All Fields are mandatory.' Below this, there are two input fields: 'Inventory List ID' and 'Output file'. Both fields have a red asterisk indicating they are mandatory. To the right of the 'Output file' field is an 'Export CSV' button.

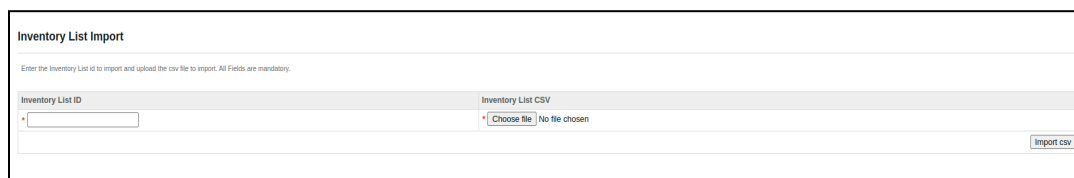
- On the export page, there will be two inputs, in the first one you need to key in the inventory ID, and in the second one you need to name the export file.
- After you click the export button, you will be redirected to the first import/export screen where you can see your operation in the list and its status.
- Once the status is updated from running to success or error, you can click on the operation to check the logs and download the export file.



The screenshot shows the 'CSV Export Monitor' page. It has a title bar 'CSV Export Monitor' and a subtitle 'CSV InventoryList export is successful'. Below this, there is a 'Log File' section with a text area containing log messages. At the bottom, there is an 'Export File' section with a 'Download Export File' button and a 'Back' button.

- **Import InventoryList**

- To import the inventory from a CSV file, click on the import button and it will take you to the import page, refer to the screenshot attached below

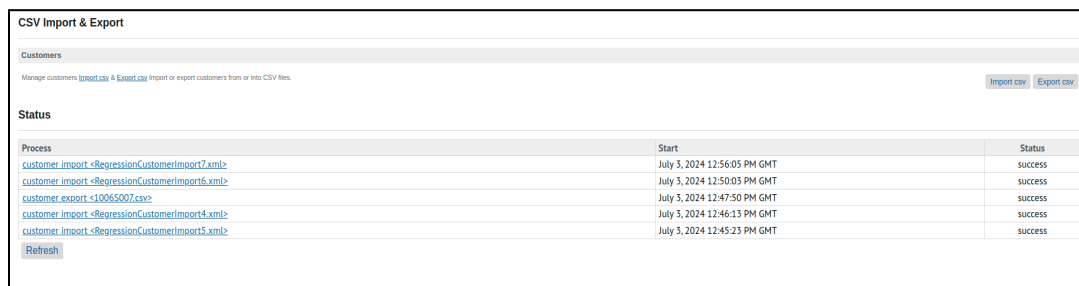


The screenshot shows the 'Inventory List Import' page. It has a title bar 'Inventory List Import' and a subtitle 'Enter the Inventory List id to import and upload the csv file to import. All Fields are mandatory.' Below this, there are two input fields: 'Inventory List ID' and 'Inventory List CSV'. The 'Inventory List CSV' field has a 'Choose file' button and a 'No file chosen' text. To the right of the 'Inventory List CSV' field is an 'Import csv' button.

- On the import page, there will be two inputs, in the first one you need to key in the inventory ID, and in the second one you need to upload/choose the properly formatted import file (Check the CSV format section).
- After you click the import button, you will be redirected to the first import/export screen where you can see your operation in the list and its status.
- Once the status is updated from running to success or error, you can click on the operation to check the logs.

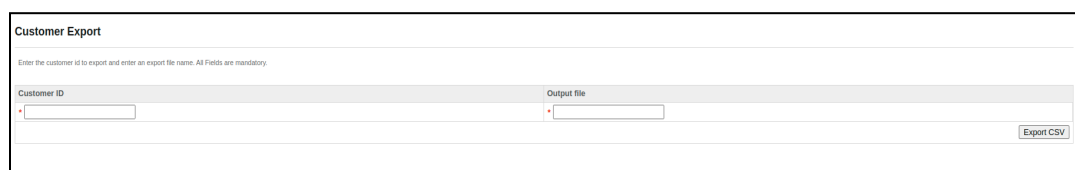
Customer Import Export

- Go to Merchant Tools > Customers > CSV Import & Export
- You will see the following screen, here you can choose the import or export operation you want to perform and the last 5 import & export operations.
- Here you can perform new import or export operations or check the status of previous operations and download the previously exported files.



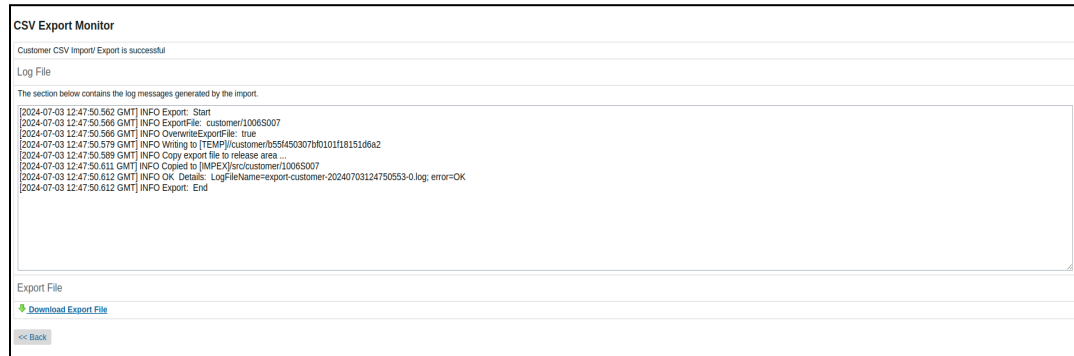
Process	Start	Status
customer import -<RegressionCustomerImport7.xml>	July 3, 2024 12:56:05 PM GMT	success
customer import -<RegressionCustomerImport6.xml>	July 3, 2024 12:50:03 PM GMT	success
customer export -<10065007.csv>	July 3, 2024 12:47:50 PM GMT	success
customer import -<RegressionCustomerImport4.xml>	July 3, 2024 12:46:13 PM GMT	success
customer import -<RegressionCustomerImport5.xml>	July 3, 2024 12:45:23 PM GMT	success

- **Export Customers**
 - To export customers in csv format, click on the export button and it will take you to the export page, refer to the screenshot attached below



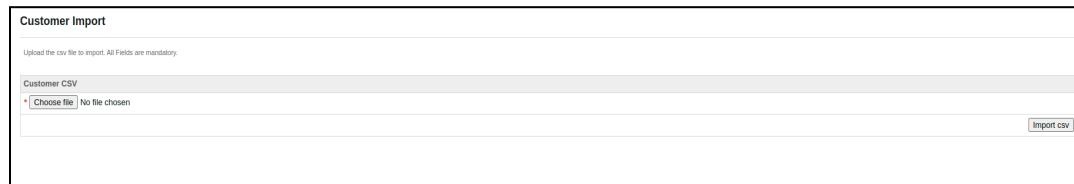
- On the export page, please follow these steps:
 - In the first input field, enter the customer IDs.
 - In the second input field, provide a name for the export file.
- After you click the export button, you will be redirected to the first import/export screen where you can see your operation in the list and its status.

- Once the status is updated from running to success or error, you can click on the operation to check the logs and download the export file.



- **Import Customer**

- To import the customer from a CSV file, click on the import button and it will take you to the import page, refer to the screenshot attached below



- On the import page, there will be an option to upload/choose the properly formatted import file (Check the CSV format section).
- After you click the import button, you will be redirected to the first import/export screen where you can see your operation in the list and its status.
- Once the status is updated from running to success or error, you can click on the operation to check the logs.

Order Export

- Go to Merchant Tools > Ordering > CSV Import & Export
- You will see the following screen, here you can choose the import or export operation you want to perform and the last 5 import & export operations.
- Here you can perform new import or export operations or check the status of previous operations and download the previously exported files.

CSV Export		
Orders		
Manage orders Export csv Export orders from or into CSV files.		
Export csv		
Process	Start	Status
order.export <RegressionOrderExport.csv>	July 3, 2024 10:47:26 AM GMT	SUCCESS
order.export <Exp2July.csv>	July 2, 2024 5:55:44 AM GMT	SUCCESS
order.export <00000402.csv>	July 2, 2024 5:05:15 AM GMT	SUCCESS
order.export <order402.csv>	July 2, 2024 5:04:04 AM GMT	SUCCESS
order.export <TopThreeOrder.csv>	July 1, 2024 6:03:57 AM GMT	SUCCESS
Refresh		

- **Export Orders**
 - To export customers in csv format, click on the export button and it will take you to the export page, refer to the screenshot attached below

Order Export	
Enter the order id to export and enter an export file name. All Fields are mandatory.	
Order ID	Output file
Export CSV	

- On the export page, please follow these steps:
 - In the first input field, enter the order ID. For multiple orders, separate each ID with a comma.
 - In the second input field, provide a name for the export file.
- After you click the export button, you will be redirected to the first import/export screen where you can see your operation in the list and its status.
- Once the status is updated from running to success or error, you can click on the operation to check the logs and download the export file.



CSV FORMAT

Custom object import file

- Column 1 in the first row should be the custom object ID, and the rows below this should be the key attribute.
- All columns in the first row from the second column should be the attribute IDs, and the following rows should be their values.

Pricebook import file

- Row 1 should contain 3 keys product, quantity, and price
- The following rows should have their respective values

Catalog import file

- The first row should be the IDs of the attributes of the product system object.
- The attribute IDs should follow the following pattern
 - The system attribute IDs should be entered as it is.
 - The custom attribute IDs should have a “c_” prefix.
 - The localizable system and custom attributes should have a “:x-default” or “: locale id” suffix.
 - The variation attributes should have a “v_” prefix.
 - The Store attributes should have a “s_” prefix.
 - The images should be provided as “image-index”.
- If any product does not have a value for the attribute the column should be kept blank.
- If no product in the file has a value for a given attribute, the attribute should be removed from the file.

Inventory import file

- Row 1 should contain 3 keys productid, allocation, and perpetual
- The following rows should have their respective values

Customer import file

- The first row should contain the IDs of the attributes of the customer system object.
- The following rows should contain the respective values for each attribute.
- The attribute IDs should follow the following pattern
 - The system attribute IDs should be entered as it is.
 - The custom attribute IDs should have a "c_" prefix.
 - The localizable system and custom attributes should have a ":x-default" or ": locale id" suffix.
- The date format should be yyyy-mm-dd.
- Passwords will not be updated for new customers.
- If a customer does not have a value for an attribute, the corresponding column should be left blank.