

Mass Create new Products - GBU Data Steward

Overview

Who: GBU Data Stewards

What: Fill an Excel template to add new products in Salesforce and send it via a freshdesk ticket.

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Step-by-step

I. Identify products

Download the Excel template : <https://soilway-crm.my.salesforce.com/01524000001FiTP>



Document

Template - Products creation

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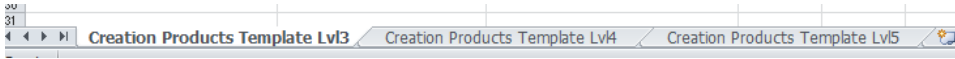
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Author	Julien Gasqueton [Change]
File Extension	xlsx
MIME Type	application/vnd.openxmlformats-officedocument.spreadsheetml.sheet
Size	4.3MB
Description	
Keywords	
Created By	Julien Gasqueton , 06/07/2016 15:33 M

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Open the excel template, and select "Creation Products Template Lv3" sheet if you ask for a Level 3 product creation, "Creation Products Template Lv4" for a Level 4 product creation...



II. Fill the Excel template

In each worksheet the columns in blue are **MANDATORY**.

A	B	C	D	E	F	G	H	I	J	K	L
NAME	PRODUCTCODE	DESCRIPTION	ISACTIVE	TYPE_C	SLV_COMMERCIAL_NAME_C	SLV_PRODUCT_NAME_C	SLV2_PRODUCT_GENIC_PRODUCT_C	SLV2_PRODUCT_STATUS_C	UNIT OF MEASURE	SLV_UNIT_OF...	PRODUCT...

To create the products in Salesforce, we need some ID (particularly ID Levels).

Home Need Help Chatter Accounts Contacts Activities Visit Reports Account Plans Cases Opportunities Cross BU Leads An

Export Products (pour GBU Data Steward)

Report Generation Status: Note: 2 000 of 15 437 records are displayed below. Select Export Details for a complete view of your data.

Report Options:

Summarize information by: --None-- Show All products

Time Frame: Date Field Created Date Range Custom From To

Run Report Hide Details Customize Save Save As Delete Printable View **Export Details** Subscribe

Product ID	Product Code	Product Name	Level 1: Product Name	Level 2: Product Name	Level 3: Product Name	Level 4: Product Name	Level	Product Description
01124000004UHaw	-	BLEND	BU INSULATION MATERIALS	CH3T-THERMAL INSULATION			Level 3	BLEND
0112400000458os	90071174	RHODASURFL7D	Novicare	SURFACTANTS	NONIONIC SURFACTANT		Level 4	RHODASURFL7D

That is why the Excel file is so heavy. It contains some formulas as transforming text into ID.

Warning: All the names you filled in the template must be exactly the same than in Salesforce otherwise we cannot have the ID.

For some fields, you have picklists to help you.

Reports
available to
help you:

Use report to find name of the products (used for the Levels):

- **F**o**l**d**e**r : G B U D a t a S t e w a r d R e p o r t s
- **R**e**p**o**r**t : E x p o r t P r o d u c t s (f o r G B U D a t a S t e w a r d)

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Fill the Level1, Level2, Level3, Level4 with the report to be sure to have the real name (each level is also a product).

Note: Green columns are protected, you can not do anything.

Warning: All the level must be completed. If you are in the worksheet "Creation Products Template V5", now Levels 1 to 4 are mandatory (not only the Level 4)

F	G	H	I	J	K	L	M
LEVEL_1_Libellé	Key Lvl1 Product (do not use)	ID Lvl1 (used for loading)	LEVEL_2_Libellé	Key Lvl2 Product (do not use)	ID Lvl2 (used for loading)	LEVEL_3_Libellé	Key Lvl3 Product (do not use)
EP	EP Level 1	011240000043e42AAA	TO BE CLASSIFIED	EP TO BE CLASSIFIED Level 2	011240000043e4qAAA	TO BE CLASSIFIED	EP TO BE CLASSIFIED TO BE CLASSIFIED Level 3

III. Send the template to SBS support via Freshdesk.

Once filled, send the Excel file to SBS support via Fresh desk.

SBS SUPPORT
SOLVAY

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