

Mass Update Products - GBU Data Steward

Overview

Who: GBU Data Stewards

What: Fill an Excel template to update 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://soilvay-crm.my.salesforce.com/0152400001F1TU>

Document Help

Template - Update products

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Document Name	Template - Update products
Internal Use Only	<input type="checkbox"/>
Document Content Searchable	<input checked="" type="checkbox"/>
Folder	SBS Support
Author	Julien Gasqueton [Change]
File Extension	xlsx
MIME Type	application/vnd.openxmlformats-officedocument.spreadsheetml.sheet
Size	4.06MB
Description	
Keywords	
Created By	Julien Gasqueton , 06/07/2016 15:34
Modified By	Julien Gasqueton , 19/04/2017 14:59

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Open the excel template.

Only one tab is available

II. Fill the Excel template

The blue is **MANDATORY**

To update a product in Salesforce, we need its ID.

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

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

For some fields, you have picklists to help you.

Reports available to help you:

A	B	C	D	E	F	G	H	I	J	K
NAME	ID	PRODUCTCODE	DESCRIPTION	ISACTIVE	TYPE_C	LEVEL_L_Levels	Key Lvl Product (do not use)	ID Lvl (used for loading)	LEVEL_L_Labels	Key Lvl

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

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	-	<u>BLEND</u> S	<u>BU INSULATION MATERIALS</u>	<u>CH3T - THERMAL INSULATION</u>			Level 3	BLENDS
0112400000458os	90071174	<u>RHODASURF L 7 D</u>	<u>Novicare</u>	<u>SURFACTANTS</u>	<u>NONIONIC SURFACTANT</u>		Level 4	<u>RHODASURF L 7 D</u>

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 ID column with the product ID you want to update.

You should fill all the fields that are useful (even if the values do not change). When the file will be uploaded, if a cell is blanked it will be erased the actual value.

Fill the Level1, Level2, Level3, Level4 with the report to be sure to have the real name.

III. Send the template to SBS support via Freshdesk.

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

SBS SUPPORT

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