

# Importing and Updating Product Data using Import Wizard



## Overview

This document is an excerpt from the ProductCart User Guide. You can [download](#) the latest version of the ProductCart User Guide [here](#).

ProductCart allows you to quickly populate your product catalog (database) by importing information from an existing product database or data file. If you are not planning to import product information from an existing database, skip this section and move onto the next one. Otherwise, carefully read the following paragraphs.

Properly preparing your database file prior to importing it into ProductCart can save you a lot of time (*and headaches*). The vast majority of technical support requests that we receive from customers that are using the Import Wizard are due to improper formatting of the file to be imported. For example, users often forget to define the import range in their Microsoft Excel file (please see below for details on how to do so).

ProductCart supports importing from the following file types:

- Microsoft Excel (\*.xls)
- Comma Separated Value (\*.csv)

Importing a product database into ProductCart requires the following steps:

1. Properly formatting your file. The steps to be taken are different depending on whether you are planning to use a \*.xls or \*.csv file.
2. Uploading the file to your server. You can either use the built-in upload feature or FTP the file to the *catalog* subfolder within the *pc* folder.
3. Specifying whether you are importing new products or updating existing products.
4. Mapping fields from the file to ProductCart's database.
5. Confirming mapped fields.
6. Performing the import.
7. Reviewing which records could not be imported and why.

ProductCart's **Import Wizard** will guide you through the process step by step, as explained later in this section. First, however, you will have to spend a little time formatting the file so that it can be seamlessly imported into ProductCart.

## Formatting your file

Carefully review the requirements for each field so that you will not run into conflicts when mapping the fields. In addition, we strongly suggest that you remove columns that do not contain data, so that the file that you upload to ProductCart is smaller in size and mapping is less confusing. And you may also want to rename the column headings so that they can easily be recognized when mapping the fields.

An empty excel file with the available fields for importing is available for download from the following URL: [http://www.earlyimpact.com/productcart/support/sample\\_import\\_file.zip](http://www.earlyimpact.com/productcart/support/sample_import_file.zip)

Regardless of which file type you plan to use during the import, it is very important that you make sure your file is formatted properly prior to importing into ProductCart.

## Preparing an Excel file for import

If you are importing an Excel file, the following steps MUST be taken in order for the import to be successful:

**STEP 1:** Convert all SKU values in the .XLS file to *Text*:

- Open your .XLS file in Excel.
- Select the SKU column by left clicking on the Column header.

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- Select the menu item: *Data > Text to Columns*. The *Convert Text to Columns Wizard* will be displayed.
- In Step 1 of the wizard, click on the *Next* button.
- In Step 2 of the wizard, click on the *Next* button.
- In Step 3 of the wizard, select *TEXT* in *Column data format*, then click on the *Finish* button.

## STEP 2: Create a name for the data range:

- The Excel import feature requires a named range and the range must be named "IMPORT".
- Remove all empty columns.
- Remove all columns that you do not intend to import.
- Remove all empty rows.
- Select (highlight) the entire data range (columns and rows) that you want to import (including the top row, which should contain the field names).
- Select the menu item: *Insert > Name > Define*
- Enter the name "IMPORT" without the quotes and click on the *Add* button.
- Save the .XLS file.

Here is an example of what the IMPORT range should look like (it **must** contain all cells that are part of the IMPORT, including the header or top row – such as the shaded area in the example below):

IMPORT									
fx sku									
	A	B	C	D	E	F	G	H	
1	sku	name	description	price list	wholesale	weight	stock	cat	
2	sun1	Sunset 1	This is a beautiful sunset!	50	60	40	16	20	Pic
3	sun2	Sunset 2	This is a beautiful sunset!	60	72	48	16	20	Pic
4	sun3	Sunset 3	This is a beautiful sunset!	72	86.4	57.6	16	20	Pic
5	flower1	Flower 1	This is a beautiful flower!	100	110	90	16	20	Pic
6	golf1	Golf 1	This is a beautiful golf picture!	120	130	110	16	20	Pic
7	laguna1	Laguna 1	This is a beautiful beach picture	140	150	130	16	20	Pic
8	sanfran	San Fran	This is a beautiful picture of Sa	200	220	180	16	20	Pic
9									
10									
11									

The vast majority of technical support requests that we receive from users of ProductCart that are not able to successfully import an XLS file are due to improperly setting the IMPORT range. If you are experiencing problems, please review the steps outlined above to make sure that the IMPORT range has been properly defined.

**Note:** If you are planning to import complex product descriptions containing HTML code, we **strongly recommend** that you import an Excel file and NOT a CSV file. The way fields are separated in a CSV file (i.e. using a comma) can create conflicts with some of the characters used in your HTML code. In our internal tests, we did not encounter any issues importing HTML descriptions using an Excel file. Always remember to back up your existing database before performing any product import or update.

## Updating data within an existing store database

You can either import new product data or **update/append data** to an existing product database. For example, if you need to update the list price of 300 existing products in your store, you could import a file that only contains the SKU and the updated price.

If you wish to update/append data, select that option during the import procedure: the Import Wizard will prompt you to make a selection after you have uploaded your data file to the system. ProductCart will use

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the SKU (part number) field as the product identifier and update database records whose SKU is an exact match with the data that you are importing. If the SKU is not an exact match, a new product (database record) will be added (in which case it must also contain the 3 additional required fields). The field is not case sensitive.

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## Fields Description

You can import the following fields. Please carefully read the format requirements.

Field Name	Data Type	Required	Comments
SKU	Text	Yes	Product part number. Text string (alphanumeric characters). Max characters: 50 (Access), 100 (SQL). Do not use underscores “_” in the SKU. Used as product identifier when updating data: only if SKU is an exact match data is updated.
Name	Text	Yes*	Product name. Max 255 characters.
Description	Text	Yes*	Product description. It can contain HTML tags. Max characters: unlimited (Access and SQL). Note: do not use HTML code created by MS Word as it may create conflicts.
Short Description	Text		The purpose of the Short Description is to allow the display of a few key lines of product information on the product details page while keeping the “Add to Cart” button above the fold. The Short Description is also used by all of the category display options with the exception of: “viewCat_h.asp”.
Product Type	Text		For standard products, leave blank. For downloadable products, enter “DP” (without the quotes). For Build To Order products, enter “BTO” (same). For Build To Order Items, enter “ITEM” (same). <a href="#">Click here for more information</a> on this field.
Online Price	Number	Yes*	This is the product price. It can be zero. If importing a BTO product, this is the base price (see Chapter 14 for more information).
List Price	Number		This can be shown on the store below the product price, stricken through.
Wholesale Price	Number		Optional price for wholesale customers.
Weight	Number		Weight in ounces or grams, depending on how the store has been setup upon activation. E.g. for 4 pounds, enter 64. For 5 Kg, enter 5000.
Stock	Number (Integer)		Stock level. If empty or zero make sure to set the store to ignore inventory settings (see section later in this chapter). You can also set this on a product by product basis.
Category name	Text		This is the name of the main Category to which the product is assigned (vs. the additional categories mentioned below). All products must be assigned to at least one category. If blank, the product is placed in a temporary category. If the name doesn’t match an existing category name, a new category is created. Max characters: 50 (Access), 100 (SQL).

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Field Name	Data Type	Required	Comments
Short category description	Text		Provides information on the subcategories that the category might contain. It can contain HTML tags. Max characters: unlimited (Access and SQL). Note: do not use HTML code created by MS Word as it may create conflicts. See later in this chapter for more details on category descriptions.
Long category description	Text		Provides information on the products that the category contains. It can contain HTML tags. Max characters: unlimited (Access and SQL). Note: do not use HTML code created by MS Word as it may create conflicts.
Category Small Image	Text		Refers to the main Category. File name, no path. All images should be uploaded to the "pc/catalog" folder. Small image displayed when users browse the store, only if the "Display category images" feature is on.
Category Large Image	Text		Refers to the main Category. File name, no path. All images should be uploaded to the "pc/catalog" folder. Larger image displayed only with display options that require it.
Parent Category	Text		If blank, the main Category is placed in the root. If it matches an existing category, then the main Category is imported as a subcategory of that Parent. If it doesn't match any existing category, a new Parent category is created in the root, and the main Category is assigned to it.
Additional Category 1	Text		Assigns the Product to an additional category. If the category does not exist, a new category is created.
Parent Category 1	Text		Parent category for Additional Category 1. If blank and Additional Category 1 is not blank, Additional Category 1 is added to the root. If it matches an existing category, then Additional Category 1 is imported as a subcategory of that category. If it doesn't match, a new Parent category is created in the root, and Additional Category 1 is assigned to it.
Additional Category 2	Text		Assigns the Product to an additional category. If the category does not exist, a new category is created.
Parent Category 2	Text		Parent category for Additional Category 2. If blank and Additional Category 2 is not blank, Additional Category 2 is added to the root. If it matches an existing category, then Additional Category 2 is imported as a subcategory of that category. If it doesn't match, a new Parent category is created in the root, and Additional Category 2 is assigned to it.
Brand Name	Text		If blank, product is not assigned to a brand. If it doesn't match an existing brand, a new brand is

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Field Name	Data Type	Required	Comments
			created.
Brand Logo	Text		File name, no path. All images should be uploaded to the "pc/catalog" folder. Shows on Browse by Brand page when "Show Brand Logo" option is turned on.
Thumbnail Image	Text		Product thumbnail image. Recommended size is 100 x 100 pixels or less. Jpeg or GIF. Both file name and paths are accepted: the import wizard automatically retrieves the file name from a path. All images should be uploaded to the "pc/catalog" folder.
General Image	Text		Product image displayed on the product details page. Recommended size is 200 x 200 pixels or less. Same as above.
Detail view Image	Text		Product image displayed on the product details page via the "Zoom: feature. Any size. Same as above.
Active	True/Yes = -1 False/No = 0		Whether the product is active. If blank, it defaults to "True".
Show savings	True/Yes = -1 False/No = 0		Whether the store should show the difference between Online and List Price. If blank, it defaults to "True".
Special	True/Yes = -1 False/No = 0		Whether the product should be added to the list of Specials. If blank, it defaults to "False".
Option1	Text		Name of the first option group (e.g. "Size"). If blank, the following two fields are ignored. If it's not a match in the database, a new option group is created.
Option1 Attributes	Text		The attribute(s) within the group (e.g. "Small", "Medium", "Large"). Use the format explained in the section " <a href="#">Importing Product Options</a> ".
Option1 Required	True/Yes = 1 False/No = 0		Whether customers are required to select an attribute from this option group.
Option2	Text		Name of the second option group (e.g. "Color"). If blank, the following two fields are ignored. If it's not a match in the database, a new option group is created.
Option2 Attributes	Text		The attribute(s) within the group (e.g. "Red", "Blue", "Green"). Use the format explained in the section " <a href="#">Importing Product Options</a> ".
Option2 Required	True/Yes = 1 False/No = 0		Whether customers are required to select an attribute from this option group.
Reward Points	Number (Integer)		<a href="#">Reward Points</a> that customers will accrue when purchasing this product.
Non-taxable	True/Yes = -1 False/No = 0		Whether the product is non-taxable. If blank, it defaults to "False".

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Field Name	Data Type	Required	Comments
No shipping charge	True/Yes = -1 False/No = 0		Whether shipping charges should not be calculated for this product. If blank, it defaults to "False".
Display no shipping text	True/Yes = -1 False/No = 0		Whether the text indicating that no shipping charges are applied to the product should be displayed. If blank, it defaults to "False".
Minimum Quantity	Number (Integer)		Minimum quantity customers have to purchase when they purchase this product. It can be used in conjunction with the "Enforce Multiple of Minimum" field. See later in this chapter for more details on this feature
Enforce Multiple of Minimum	True/Yes = -1 False/No = 0		Whether or not the quantity purchased should be a multiple of the minimum. Enter "1" to require a quantity that is a multiple of the minimum. The minimum quantity must be > 0
Not for sale	True/Yes = -1 False/No = 0		Whether the product is <u>not</u> available for sale. If blank, it defaults to "False".
Not for sale copy	Text		Text description (e.g. <i>Coming Soon</i> ). Only used if "Not for sale" option is set to True.
Disregard Inventory	True/Yes = -1 False/No = 0		Whether general inventory settings should not apply to the selected product. If the store is setup not to allow the purchase of out of stock items, the selected product can be purchased regardless of its inventory level, when option is set to True. If blank it defaults to "False".
Custom Search Field (1)	Text		Both field name and field values are imported. Learn more about <a href="#">Custom Search Fields</a> .
Custom Search Field (2)	Text		
Custom Search Field (3)	Text		
Oversized Product Details	Text		It must follow the format: <b>N1xN2xN3</b> where N1, N2 and N3 are numbers (inches or centimeters) that correspond to the height, width, and length of the box in which the oversized product is shipped (e.g. 12x12x24). When the format is correct, the product is set as "Oversized" and the box dimensions are stored in the database. See the Shipping Options section for more information about shipping oversized products.
<b>The following fields apply only if the Product Type is "DP" (Downloadable Products)</b>			
Downloadable File Location	Text		Enter the full path on the server's hard drive to the downloadable file. For example: D:\web\my_account\my_files\file.zip
Make Download URL Expire	True/Yes = 1 False/No = 0		Enter 1 if you want the download URL to expire, otherwise enter 0.

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Field Name	Data Type	Required	Comments
URL Expiration in Days	Number (Integer)		Enter the number of days you want the download URL to remain active.
Use License Generator	True/Yes = 1 False/No = 0		Enter 1 if you want to use a License Generator for this Product, otherwise enter 0.
Local Generator	Text		If your Downloadable Product requires a License, enter the name of the file that generates this License ( <u>not</u> the path). For example: myLicense.asp The file must be placed in the following folder: /ProductCart/pcadmin/licenses/
Remote Generator	Text		If your Downloadable Product requires a License that is generated by a Remote Server, enter the HTTP:// path to the file on the remote server here.
License Field Label 1	Text		This is a field used to label information generated by your License Generator. For example: "License Key"
License Field Label 2	Text		This is a field used to label information generated by your License Generator. For example: "User Name"
License Field Label 3	Text		This is a field used to label information generated by your License Generator. For example: "Password"
License Field Label 4	Text		This is a field used to label information generated by your License Generator. For example: "Key ID"
License Field Label 5	Text		This is a field used to label information generated by your License Generator. For example: "Serial Number"
Additional Copy	Text		This is the Additional Text that will be added to the e-mail confirmation sent to the customer. E.g. it can include installation instructions.

## Notes:

- (\*) The "SKU", "name", "description" and "online price" fields are **required** during a fresh data import, but are not required when appending data to the database. Only the SKU is required during an Update/Append.... plus any field(s) that you wish to update.
- If you are importing an Excel spreadsheet, remove all empty columns.
- If you are importing a CSV file, do not use double or single quotes at the beginning of any field (e.g. this is not valid: "The King of Torts", John Grisham; the valid formatting would be: John Grisham, "The King of Torts").

**Note:** To ensure that you can quickly revert back to the way your store database was structured before performing an import or update, we strongly recommend that you ALWAYS BACK UP your existing store database before performing an import or update procedure. If your store uses a MS Access database, you can simply download the \*.mdb data file to your computer. If your store uses a SQL database, enquire with your Web hosting company about how you can have your database backed up and restored.

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## Product Type (ProductCart Build To Order and Downloadable Products only)

The Import Wizard allows you to specify which type of product you are importing: a Standard Product, a Downloadable Product, a Build To Order Product, or a Build To Order Item (for more information about the difference between a BTO Product and BTO Item, please refer to the [Chapter 14](#)). To specify the type of product that you are importing, use the following values in your import file, without the quotes:

- Leave the field blank if you want the product imported as a Standard product. Therefore, if the field is blank or the field is not mapped during the import, products are assumed to be Standard products.
- Add the value "BTO" if you want the product imported as Build To Order product
- Add the value "ITEM" if you want the product imported as Build To Order Only Item
- Add the value "DP" if you want the product imported as a Downloadable Product

## Importing Product Options

ProductCart v2.76 includes new features that allow you to import product options with the rest of the product information. For example, imagine you are importing 100 different types of shoes, each with different sizes and colors. You can now do this directly when importing new products or appending data to your existing product database.

For each product, you can specify whether there will be one or two option groups, the attributes for each option group, and whether a selection is required. If the product catalog does not already contain an option group or option attribute matching the one(s) imported, a new option group and/or attribute is created.

Product option information is imported in 6 separate fields, 3 for each option group (e.g. 3 fields for "color" and 3 for "size"). The six fields must be formatted as shown below. The actual field names can of course be different from the ones listed below: you will just need to map it correctly during the field mapping step of the import process.

- Option 1: Name of the first Option Group (e.g. "Color").
- Option 1 Attributes: List of attributes for the first option group. The format must be as follows: separate values for each attribute with a \*, and separate different attributes with \*\*. The attribute values that can be imported are:
  - Option Attribute: text, required (e.g. "red")
  - Price differential: number, not required (e.g. "5.50" or "-6")
  - Wholesale Price differential: number, not required (e.g. "3.20" or "-4.35")
  - Display order: integer, not required
  - Option active/inactive: 1 (active) or 0 (inactive), required.

For example, assume you are importing 3 sizes: medium, large and x-large, and that you want them to appear in that order, and a price increase is associated with the x-large option (plus \$5 for retail customers and plus \$4.50 for wholesale customers). The field should contain the following string:

Medium\*0\*0\*1\*1\*\*Large\*0\*0\*2\*1\*\*X-Large\*5\*4.50\*3\*1

Once again, note how different option attributes are separated by a double asterisk (\*\*), whereas individual settings for a certain attribute are separated by a single asterisk (\*).

- Option 1 Required: Whether or not customers are required to make a selection from this menu. Use 1 for "Required" and 0 for "Not Required".
- Option 2: Name of the second Option Group assigned to the product, if any.
- Option 2 Attributes: Attributes for the second Option Group assigned to the product, formatted as explained above.
- Option 2 Required: same as for Option 1.

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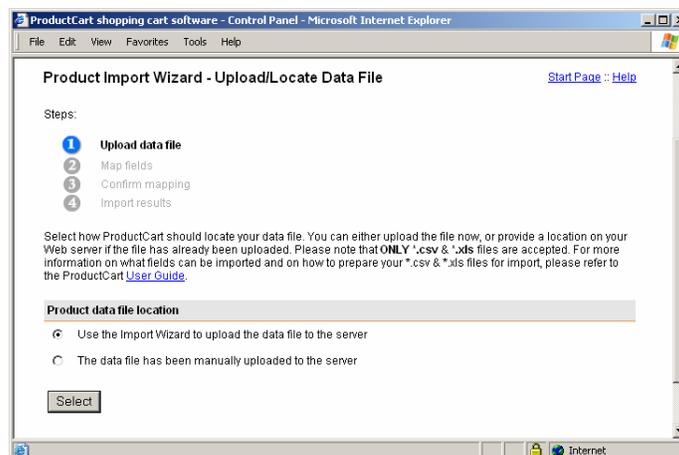
## Apparel Products

If you are using the Apparel Add-on for ProductCart, you can now import apparel products settings when importing products into the database. In addition, you can now import “sub-products” via a separate import wizard. Both features are available in v1.7 of the Apparel Add-on. Please consult the Apparel Add-on User Guide for more information.

The Apparel Add-On gives stores using our ProductCart ecommerce software the ability to handle inventory for product variations (e.g. color/size combinations). This is something that is typical of the apparel industry (yep, that’s why we called it that way), but it applies to other industries as well. What does this mean? For example, if size 32/34 of a pair of black pants is out of stock, the customer is notified. For more information on ProductCart’s Apparel Add-on, please visit: <http://www.earlyimpact.com/productcart/apparel-software.asp>

## Step 1 – Upload the file

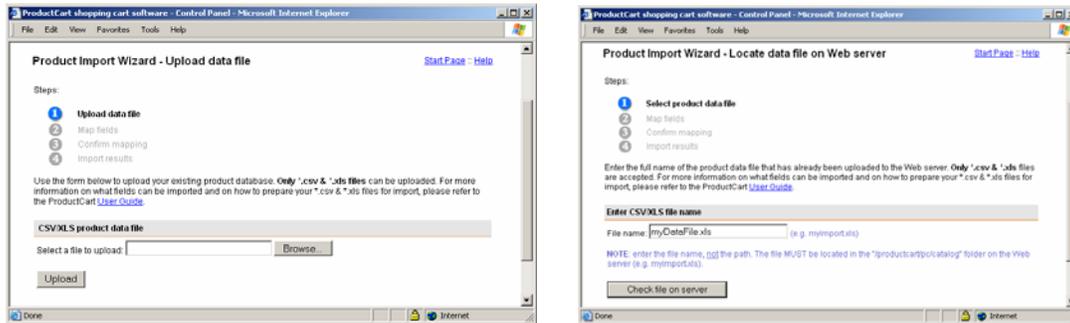
Now that you have prepared your Ms Excel or CSV data file for importing it into ProductCart, select *Import Products* from the *Manage Products* menu. ProductCart’s **Import Product Wizard** will be started and the following screen will be displayed.



Make sure to **back up the ProductCart database** before proceeding (e.g. FTP the file to your local computer). This is especially important if you are importing data into already active store. You will be able to quickly restore the database in case for any reason the import procedure did not complete successfully.

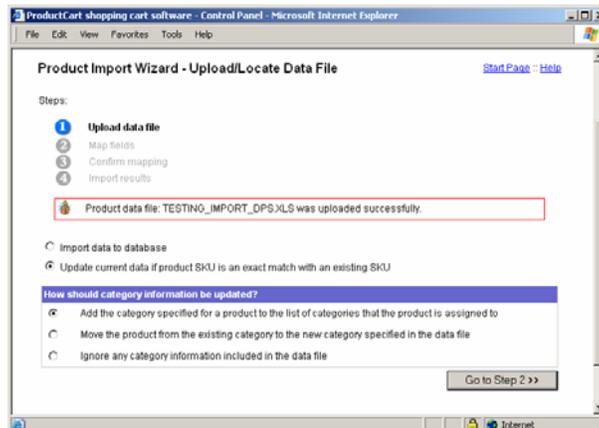
You can either upload the data file through the Import Wizard or via FTP (recommended for large files). If you choose to upload the file through the Import Wizard, browse to the file and then click on the *Upload* button. The form is validated to make sure that only \*.XLS and \*.CSV files are uploaded to ProductCart. If you prefer to use FTP, you must place the file in the following folder: “*pc/catalog*” and then enter ONLY THE FILENAME in the field provided. ProductCart will verify that the file exists on the server before proceeding to Step 2.

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Once the file has been uploaded/located successfully, the Import Wizard will ask you to choose whether you intend to import new data to the database, or update existing data.

- If you are **importing data** into your store database, ProductCart will NOT import products whose SKU matches that of products that already exist in the database, to avoid importing duplicates. Products that could not be imported due to a SKU match are listed at the end of the import procedure.
- If you are **updating data** note that the SKU is used as the product identifier. A product's data will be updated when the SKU is an exact match. If the SKU is not an exact match, a new product will be added. When you are updating the product catalog, you will need to make a selection among the following three options, with regard to the way category information is imported:
  - *Add the category specified for a product to the list of categories that the product is assigned to.* This option allows you to add new categories to the list of categories that the selected product is already assigned to. Since you can import up to 3 categories for each product, this option allows you to quickly add products to multiple categories.
  - *Move the product from the existing category to the new category specified in the data file.* When this option is selected, the product is removed from the current category and assigned to a new one.
  - *Ignore any category information included in the data file.* Any category information in the data file is simply ignored, i.e. a product's category assignment is not altered.



## Step 2 – Map the fields

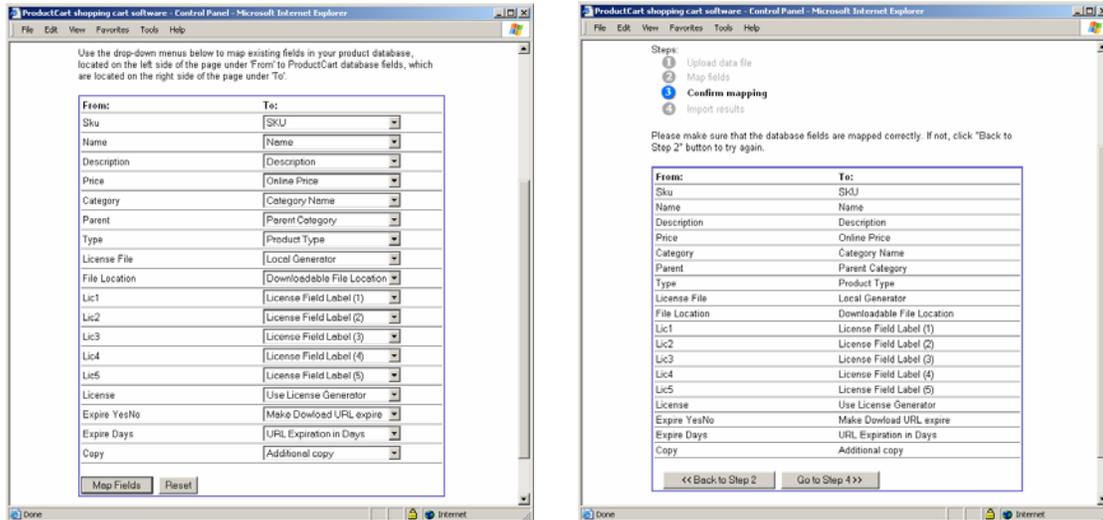
The next window allows you to easily map fields between the two databases. Your import file's column headings are listed on the left side and ProductCart's on the right. Carefully map each field. Leave blank the ones for which you do not have any information to import. Note that the following fields are required: SKU,

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name, description, online price. If any of these fields are not mapped, you will receive an error message and will be prompted to map them.

Make sure that you don't map the same field twice. If you do so, ProductCart will return an error message and will prompt you to verify that all fields are mapped uniquely.



## Step 3 – Confirm mapped fields

Next, ProductCart shows you the fields as you have mapped them. Verify that the information is correct, and then proceed to the next step. Otherwise, go back to Step 2 and change the incorrect mapping settings. ProductCart will now start populating the database. Depending on the number of records that you are importing, this task may take several minutes.

## Step 4 – Import completed

Once all records have been imported, ProductCart will display a report that lists the number of records successfully imported, those that could not be imported and why. For example, you will be shown a list of products that could not be imported due to the fact that some of the required fields were not present, or because you were importing duplicate SKUs.

To visually confirm that the import was successful, navigate to the product catalog (thru the storefront) to verify that product information was imported as you expected. Also, select *Manage Categories* to ensure that the category tree that you imported was organized correctly.

**Note:** Any product that could not be placed in a category should have been assigned to a temporary category called "Imported Products". Using the Control Panel you can create a new category and assign multiple products to it at once. You can also modify category assignments from the *Modify Product* page.

## "Undoing" the last product import/update

ProductCart now allows you to easily "undo" an import/update by reverting back to the data that was stored in the product database before new data was imported or updated. For example, let's assume you decide to update the price of 100 products by importing a file that contains the SKU and the new price. You then

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realize that the price update should have been applied at a later time. How can you go back to the original price for the time being? The “undo” feature allows you to quickly restore the original prices.

When products are imported or updated, ProductCart saves a log of what information was imported in the files *importLogs/prologs.txt* (product information) and *importLogs/catLogs.txt* (category information). The system uses this information to remove the data that was imported/updated.

To “undo” the last import/update, select *Import Wizard* from the *Manage Products* menu, and then click on the *Undo Last Import* or *Undo Last Update* button. Note that the button is only visible once you have imported or updated products. The “undo” can only be applied to the last import or update. It cannot be applied to previous imports or updates.

Note that this feature is not a substitute for backing up your store database before importing or updating data. Backing up your database remains the safest way to ensure a quick recovery in case the database is compromised during an import or update procedure.