

Beauty Advisor - mass imports

/ Getting started

Using the administration panel, you can perform:

- mass update of BA clients
- mass import of new BA clients
- mass import of new BA consultants
- mass update of BA consultants
- mass customer anonymization

You can perform all types of imports in the **Import / Export > Import** section. Dedicated descriptions are included in the following chapters of the article.

i Remember

Mass import – an operation that allows the to collective add new data to the administration panel as well as modify and delete the existing data. The operation is initiated by loading one import file or a set of appropriately constructed import files in the indicated location in the administration panel.

i Remember

For basic information on BA commerce, see the article [Beauty Advisor - getting started](#).

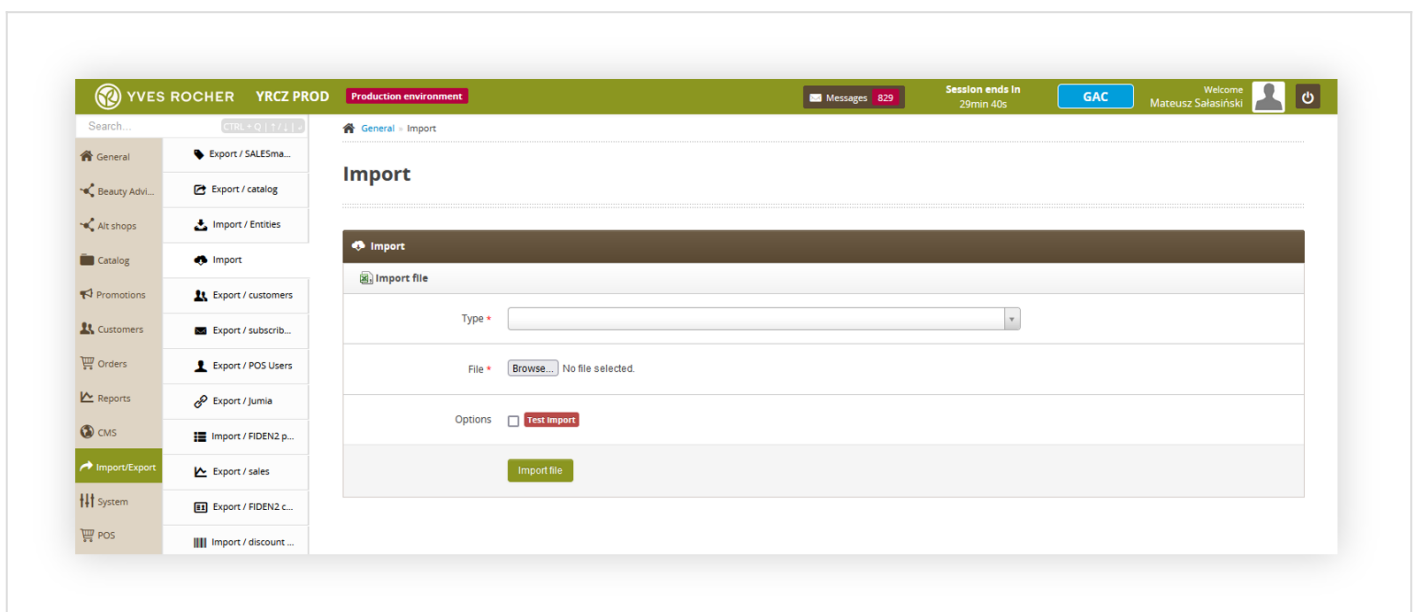
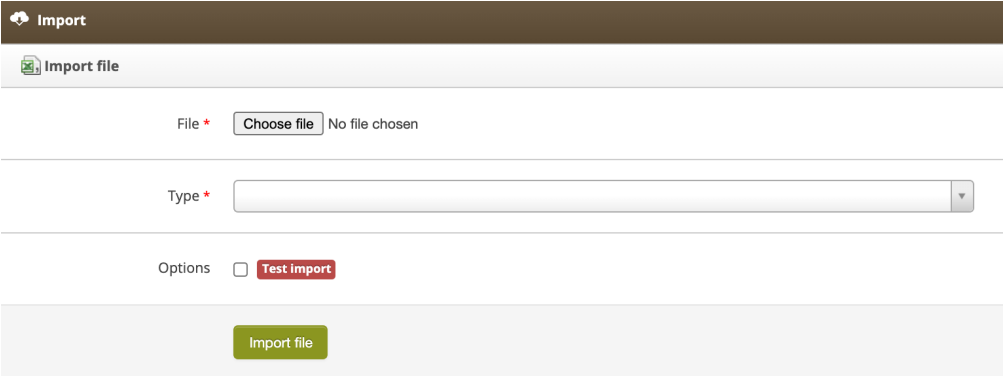


Table of Contents:

- [Description of “Import” tab](#)
- [Mass update of BA clients](#)
 - [Full import version](#)
 - [Lite version](#)
- [Import of new BA clients](#)
- [Mass update of BA consultants](#)
- [Import of new BA consultants](#)
- [Import of BA customer anonymization](#)

/ Description of “Import” tab

Below you will find a description of the possible actions in the Import tab.



The screenshot shows the 'Import' tab interface. At the top, there is a dark brown header with the word 'Import' and a refresh icon. Below this is a light gray bar with 'Import file' and a file icon. The main area contains three sections: 1. 'File *' with a 'Choose file' button and the text 'No file chosen'. 2. 'Type *' with a dropdown menu. 3. 'Options' with a checkbox and a 'Test import' button. At the bottom, there is a large green 'Import file' button.

Import tab in the Import / Export> Import section

- **File** – option to choose an import file from the local disk. The file format depends on the type of import performed.
- **Type** – specification of the type of import performed.

- **Options** – option to perform a test import. The operation will not end with data import, but you will receive a report that allows to verify whether the import result is correct.
- **Import file** – click the button to start mass import. Selecting this button and confirming the form will start data processing.

All types of imports described in the current article can be performed by following these steps:

1. Select the import file from the local disk.
2. Indicate the type of import.
3. Press the **Import file** button.

/ Mass update of BA clients

Due to the current limitations in the import of Excel files, you can perform two types of import (full version import and lite import). Each type is described in the following section. The current import is limited to approximately 100,000 rows. This limit will be extended with further updates.

Remember

Import is possible only for users of the administration panel assigned to one of the following groups:

- Administrator
- Super Administrator
- Root

More information on the administration panel user groups is available in the article [User groups in the administrative panel](#)

Full import version

The full import version (import type: “Customer contact database for Consultant update”) contains all the updateable data about the BA customer. Below you will find descriptions of the columns in the import file.

| | A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P |
|---|--------------------|------------|------|-------|-----------|---------|------|-------------|---------|-----------|---------|-------|------------|-----------|-----------|-----------|
| 1 | LAST_CUSTOMER_CODE | FIRST_NAME | NAME | PHONE | ACTUAL_SH | RANKING | CITY | POSTAL_CODE | STREET1 | HOUSE_NUM | BOX_NUM | EMAIL | DATE_BIRTH | TOP1_TO_P | TOP1_TO_F | TOP1_TO_L |
| 2 | | | | | | | | | | | | | | | | |
| 3 | | | | | | | | | | | | | | | | |
| 4 | | | | | | | | | | | | | | | | |
| 5 | | | | | | | | | | | | | | | | |
| 6 | | | | | | | | | | | | | | | | |

Import file content (file type) : „Customer contact database for Consultant update“

Remember

The fields marked with an asterisk (*) are mandatory fields. If the field remains empty, the import of the given record will return an error.

Remember

Empty values in the optional fields will delete the currently existing data in the administration panel, leaving the field empty.

Remember

If the system detects a row with a new BA client in the imported file during import, the import of the given record will return an error.

All the parameters described below modify the data in the tab **Customer Data**, located in the customer data preview. For details about the view, see [Beauty Advisor > Contacts - viewing and managing BA clients](#).

- **LAST_CUSTOMER_CODE** - customer's FIDEN2 card number.
- **FIRST_NAME *** - BA customer first name.
- **NAME *** - BA customer's last name.
- **PHONE *** - BA customer's phone number with country code (configuration is described in the article [Beauty Advisor - system settings](#)).
- **ACTUAL_SHOP *** - POS store number assigned to the BA customer. For more information about stores, see the article [Beauty Advisor > POS retail - store management](#).
- **RANKING *** - A range of BA customers ranking (1-999999). You can find a description of this parameter in [Beauty Advisor > Contacts - viewing and managing BA clients](#).
- **CITY** - city.
- **POSTAL_CODE** - customer's postal code.
- **STREET1** - street.
- **HOUSE_NUMBER** - house number.
- **BOX_NUMBER** - premises number.
- **EMAIL** - BA customer email address.

- **DATE_BIRTH** - date of birth of BA customer.
- **LPD_BA** - date of the last purchase made through BA channel.
- **LPD_ECOMMERCE** - date of the last purchase from Yves Rocher online store.
- **LPD_RETAIL** - date of the last purchase made at Yves Rocher store using the customer's loyalty card.
- **LA** - the value of the **Last activity** filter. For details on the filter, see [Beauty Advisor - getting started](#).
- **ID** - unique BA customer identification number. Application generated parameter.

All the parameters below contain information on customer orders made in stationary stores. Values are created and overwritten only during mass import of BA customers, which represents information stored in the **Retail shopping stats** tab (details about the tab are available in the article [Beauty Advisor > Contacts - viewing and managing BA clients](#)). All fields are optional.

- **TOP1_TO_PRODUCT**
- **TOP1_TO_PRODUCT_LABEL**
- **TOP1_TO_LPD_TXT**
- **TOP1_TO_PRODUCT_PRICE**
- **TOP1_TO_TO**
- **TOP1_TO_QT**

Note

The value of the "**ID**" column cannot be modified. "**ID**" is a key parameter to identify the client.

Based on this parameter, the application performs appropriate operations on data.

Specification of the import file

- file format: .xlsx
- file name: any name

Lite version

Import in lite version (import type: "Customer contact database for Consultant update (lite version) ") allows for update of four BA client data. Below you will find descriptions of the columns in the import file.

| | A | B | C | D |
|---|-------------|---------|------------|---------|
| 1 | ACTUAL_SHOP | RANKING | LPD_RETAIL | ID |
| 2 | 0001 | 1 | | 1267868 |
| 3 | 0004 | 1 | | 1267867 |
| 4 | 0001 | 1 | | 1267866 |

Import file content (file type): "Customer contact database for Consultant update (lite version)"

i Remember

The fields marked with an asterisk (*) are mandatory fields. If the field remains empty, the import of the given record will return an error.

i Remember

Empty values in the optional fields will delete the currently existing data in the administration panel, leaving the field empty.

i Remember

If the system detects a row with a new BA client in the imported file during import, the import of the given record will return an error.

- **ACTUAL_SHOP *** - POS store number assigned to the BA customer. For more information about stores, see the article [Beauty Advisor > POS retail - store management](#).
- **RANKING *** - BA customer ranking range (1-999999). For a description of the parameter, see [Beauty Advisor > Contacts - viewing and managing BA clients](#).
- **LPD_RETAIL** - date of the last purchase made at Yves Rocher store using the customer's loyalty card.
- **ID *** - unique BA customer identification number. Application generated parameter.

Note

The value of "ID" column cannot be modified. "ID" is a key parameter to identify the client. Based on this parameter, the application performs appropriate operations on data.

Specification of the import file

- file format: .xlsx
- file name: any name

/ Import of new BA clients

With the type of import: “Customer contact database for Consultants – import XLSX” you can import new BA clients that do not exist in the admin panel.

i Remember

Import is possible only for users of the administration panel assigned to one of the following groups:

- Administrator
- Super Administrator
- Root

More information on the administration panel user groups is available in the article [User groups in the administrative panel](#).

i Remember

If, during import, the system detects a row in the imported file containing the BA client that exists in the administration panel, then the import of a given record will return an error.

The content of the imported file is identical to the mass update of BA clients in the w [Full import version](#).

Note

The import file cannot contain a column named **ID**, because it is a parameter generated automatically by the application when performing import.

Specification of the import file

- o file format: .xlsx
 - o file name: any name
-

/ Mass update of BA consultants

Import type: “POS Users” allows modification of data of BA consultants, who are in the administration panel. Below you will find descriptions of the columns in the import file.

Remember

Import is possible only for users of the administration panel assigned to one of the following groups:

- Super Administrator
- Root

More information on the administration panel user group is available in the article [User groups in the administrative panel](#)

Remember

If, during import, the system detects a row in the imported file containing a new BA consultant, then the import of a given record will return an error.

| | A | B | C | D | E | F | G | H | I | J | K |
|---|-----|------------|-----------|------------|------------|--------|---------------------|----------------|--------------------|---------------|--------------------|
| 1 | id | first_name | last_name | email | mobile | active | last_login_date | group_name | pos_reports_number | ba_pos_number | default_altshop_id |
| 2 | 641 | Janusz | Kobylarz | [REDACTED] | [REDACTED] | 1 | | Beauty Advisor | | 0001 | 1 |
| 3 | 639 | Kornel | BA | [REDACTED] | [REDACTED] | 1 | 2020-11-02 11:02:45 | Beauty Advisor | | 0001 | 1 |
| 4 | 637 | John | Doe | [REDACTED] | [REDACTED] | 1 | | Beauty Advisor | | 1 | 1 |

Import file content (file type): “POS Users”

- **id** - A unique customer identification number generated by the application.
- **first_name** - BA consultant first name.
- **last_name** - BA consultant last name.
- **email** - BA consultant e-mail address.
- **mobile** - BA consultant phone number.
- **active** - a field defining the activity of the BA consultant’s account in the administration panel. The value “1” means an active account, and the value “0” - inactive.
- **last_login_date** - the last date and time when the BA consultant logged in to the administration panel. The parameter value is generated by the application. Import does not overwrite the values in the administration panel.
- **group_name** - group to which the BA consultant is assigned in the administration panel. More information on the administration panel user groups is available in the article [User groups in the administrative panel](#)

- **pos_reports_number** - POS store number assigned to the BA consultant, used for reporting purposes.
- **ba_pos_number** - POS number assigned to the BA consultant in the administration panel.
- **default_altshop_id** - unique identification number of the default altshop, assigned in the administration panel to the BA consultant. For more information on altshop, see [Alt shops - Introduction](#)

Note

The value of “**ID**” column cannot be modified. “**ID**” is a key parameter to identify the client. Based on this parameter, the application performs appropriate operations on data.

Specification of the import file

- file format: .xlsx
- file name: any name

/ Import of new BA consultants

Type of import: “Admin user import XLSX” allows to import of new BA consultants. The description of the imported data contained in the file is presented below.

i Remember

Import is possible only for users of the administrator panel who have been assigned to the group: “Root”. More information on the administration panel user groups is available in the article [User groups in the administrative panel](#)

| A | B | C | D | E | F | G | H |
|--------|----------|---------|--|-----------------|------|----------------|-----------------|
| IMIĘ | NAZWISKO | SHOP_ID | ADRES E-MAIL | MOBILE | LANG | BA GROUP | DEFAULT ALTSHOP |
| John | Doe | 0001 | John.Doe@example.com | +48 12 345 6789 | pl | Beauty Advisor | 1 |
| Beauty | Advisor | 0001 | ba-pilot-0001@psyt.pl | +48 12 345 6789 | pl | Beauty Advisor | 1 |
| Beauty | Advisor | 0002 | ba-pilot-0002@psyt.pl | +48 12 345 6789 | pl | Beauty Advisor | 1 |
| Beauty | Advisor | 0003 | ba-pilot-0003@psyt.pl | +48 12 345 6789 | pl | Beauty Advisor | 1 |
| Beauty | Advisor | 0004 | ba-pilot-0004@psyt.pl | +48 12 345 6789 | pl | Beauty Advisor | 1 |
| Beauty | Advisor | 0005 | ba-pilot-0005@psyt.pl | +48 12 345 6789 | pl | Beauty Advisor | 1 |

Import file content (file type): "Admin user import XLSX"

- **NAME** - BA consultant first name.
- **SURNAME** - BA consultant last name.
- **SHOP_ID** - shop to which the consultant is assigned.
- **EMAIL_ADRES** - BA consultant email.
- **MOBILE_NUMBER** - BA consultant telephone number with country code telephone.
- **LANGUAGE** - language in which the BA consultant will use the administration panel.
- **BA_GROUP** - group to which the consultant is assigned. Type of import: "Admin user import XLSX" allows to assign only one of the following groups:
 - Beauty Advisor
 - Beauty Advisor CC
 - Beauty Assistant Franchise
 - Super Beauty Advisor
 - Super Beauty Assistant Franchise

The administration panel user groups are described in the article [User groups in the administrative panel](#).

- **DEFAULT_ALTSHOP** - default altshop assigned to the customer. More information on altshops is available in the article [Alt shops - Introduction](#)

Remember

If, during import, the system detects a row in the imported file containing a BA consultant that exists in the administration panel, the import of a given record will return an error.

Remember

Import type: "Admin user import XLSX" only allows you to import employees who are assigned to one of the following groups:

- Administrator
- Super administrator
- Root

Specification of the import file

- file format: .xlsx
 - file name: any name
-

/ Import of BA customer anonymization

Import type "Anonymization of the customer contact database for Consultants" allows to import of customer internal IDs located in the .xlsx file and anonymizes all of them in the BA platform. This import triggers the BA customer anonymization, which also can be done manually in the:

BA customer profile > GDPR > Anonymize account (forget customer)

The reason for the anonymization in the ***BA > Anonymized contacts*** after the import is set to "**Anonymization import**".

Remember

Import type: "Anonymization of the customer contact database for Consultants" can be used by users who are assigned to one of the following groups:

- MC business admin
- Administrator
- Super Administrator
- Root

The import is not limited to the users assigned POS, so users having one of the above-mentioned groups will be able to anonymize all BA users without any restrictions.

| A | B | C |
|---------|---|---|
| ID | | |
| 1267949 | | |
| 1267948 | | |
| 1267947 | | |
| 1267937 | | |
| 1267932 | | |
| 16556 | | |
| 16550 | | |
| 16529 | | |
| 16524 | | |
| 16522 | | |
| 16520 | | |

Visualization of the example BA customer anonymization xlsx file

As the import searches for the **ID** column, any .xlsx file can be imported, and the import mechanism will ignore all columns that are not labeled as **ID** and import ID's from the **ID** column.

Note

The anonymization process cannot be undone after the initiation. Please make sure that the imported file has the correct customers.

Specification of the import file

- file format:
 - .xlsx
 - .csv, delimiter: ; and enclosure: " , encoding: UTF-8.
- file name: any name

Revision #2

Created 27 November 2024 21:05:56 by Tau Ceti

Updated 27 November 2024 21:17:19 by Tau Ceti