

# Promotion entities import / export

## / Getting started

In this article, you can find information about the entities import / export, which allows admin panel users to export already prepared promotion conditions, actions, or rules and import them on different Yves-Rocher websites or environments. The export extracts the selected promotions "as is", which means they export them without the ability to modify them on the computer and the downloaded .zip file can only be imported. Whenever the user exports the promotion rule the entities functionality automatically exports all conditions and actions used in the selected rule.

### Remember

You can find more about the promotion module in the [Promotion module introduction](#) article. More detailed description of conditions, action and rules can be found in their respective articles: [Conditions](#), [Actions](#) and [Rules](#).

Table of contents:

1. [Exporting entities](#)
2. [Importing entities](#)

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## / Exporting entities

Promotion conditions, actions, and rules can be exported in their respective tabs while editing them. It is possible to export multiple promotions at once, and by exporting the promotional rules all conditions and actions that are active in them are also automatically exported, so whenever a

rule is exported there is no need to manually add the used in this rule actions and conditions.

The screenshot displays the 'Edit rule' interface in the Yves Rocher YRPL UAT system. The interface includes a sidebar with navigation links, a main form for editing a rule, and an 'Export stash' popup. A blue circle with the number 1 points to the 'Add to export' button in the top right of the rule form. Another blue circle with the number 2 points to the 'Export' button in the 'Export stash' popup.

**Visualized elements:**

- Header:** YVES ROCHER YRPL UAT, 1363, GAC, Welcome Mateusz Salasiński.
- Search:** Search... (CTRL + Q | ↑ / ↓)
- Navigation:** Promotions > Rules / list > Edit rule
- Form Fields:**
  - Name: example rule description
  - Rule code
  - JOY club member discount percentage: 0 (Required for ETD rules)
  - Description: This is an example rule description.
  - Rule type: Standard
  - Start date: 2023-06-30 20:00:00
  - End date: 2023-07-30 20:00:00
  - Is active?: ON
  - Sort order: 2
  - Alt shops: Available
- Buttons:** Add to export (1), Export (2), Clear.

Visualization of the export button in the rule edition view

By clicking the button **Add to export** (1) you add this promotion part to the export stash (2).

Export stash (5)

Rule: example rule description (ID: 393)

Rule: Free delivery for orders above 500 CZK (ID: 390)

Rule: KD (2021) GoC from 169 PLN (ID: 373)

Condition: 2for1test (ID: 111)

Action: TG only GoC (ID: 217)

Clear

Export

Visualization of the export stash

In the export stash, you can see all added entities with an option to clear the list or export them. By clicking the **Export** button the entities will be available to download.

### Remember

The export stash holds all the added entities even after exporting them. You can clear the stash by selecting the **clear** button, or it will get cleared itself whenever the browser is closed.

YVES ROCHER

1363

GAC

General

Batch job

Processed

Export entities

Job has been processed.

Download file

Visualization of the entities export

The exported .zip file shouldn't be unpacked or modified, as it contains all the necessary information for our system to reproduce these conditions, actions, and promotions whenever they are imported.

# / Importing entities

With a ready exported .zip file with entities, we are able to import it to any environment and country. This process consists of three steps:

1. Select file - Selection of a .zip file with entities
2. Data mapping - mapping entities to the existing promotions or creating new ones
3. Import - importing the entities and viewing the report.

This is done in:

**Import / Export > Import / entities**

The screenshot shows the 'Import / Entities' interface within the YVES ROCHER YRPL UAT system. The top navigation bar is green with the Yves Rocher logo, 'YVES ROCHER YRPL UAT', a notification icon with '1363', a 'GAC' button, and a user profile section with 'Welcome Mateusz Salasiński' and a power button. A search bar is on the left. The main sidebar lists various export and import options, with 'Import / Entities' highlighted. The main content area is titled 'Import / Entities' and features a progress bar with three steps: 'Step 1: Select file' (active), 'Step 2: Data mapping', and 'Step 3: Import'. Below the progress bar, the 'Import / Entities' section is expanded, showing a 'General' tab. In the 'General' tab, there is a 'File \*' field with a 'Browse...' button and the text 'No file selected.' Below this, a message states: 'Select ZIP file that you have downloaded by using the Export Stash functionality.' At the bottom of the section is a green 'Import file >' button.

*Visualization of the import / entities tab*

In the import entities tab, we have to choose the previously downloaded .zip file with promotions and then select the **import file** button. This will proceed with the import process to the second step, which is data mapping.

## Import / Entities

Step 1: Select file

Step 2: Data mapping

Step 3: Import

☒ File has been analyzed. Please review following result and modify linking to the local data if it is necessary. Your choices will be remembered and used during all the next imports.

Entities (12) (Source: YRPL UAT)

Entity	Status	Local data link
Action: TG only GoC (Remote ID: 217)	Valid	TG only GoC (ID: 217) <span>View</span> <span>Search</span>
Condition: 2for1test (Remote ID: 111)	Valid	2for1test (ID: 111) <span>View</span> <span>Search</span>
Rule: KD (2021) GoC from 169 PLN (Remote ID: 373)	Valid	KD (2021) GoC from 169 PLN (ID: 373) <span>View</span> <span>Search</span>
Action: KD (2021) GoC from 169 PLN (Remote ID: 214)	Valid	KD (2021) GoC from 169 PLN (ID: 214) <span>View</span> <span>Search</span>
Condition: .VPM Order value from promo after discounts (Remote ID: 107)	Valid	.VPM Order value from promo after discounts (ID: 1) <span>View</span> <span>Search</span>
Rule: Free delivery for orders above 500 CZK (Remote ID: 390)	Valid	Free delivery for orders above 500 CZK (ID: 390) <span>View</span> <span>Search</span>
Action: Name of rule description (Remote ID: 229)	Valid	Name of rule description (ID: 229) <span>View</span> <span>Search</span>
Action: Free delivery (Remote ID: 230)	Valid	Free delivery (ID: 230) <span>View</span> <span>Search</span>
Condition: Order value (CAT prices, no GP, exc) (Remote ID: 120)	Valid	Order value (CAT prices, no GP, exc) (ID: 120) <span>View</span> <span>Search</span>
Rule: example rule description (Remote ID: 393)	Valid	example rule description (ID: 393) <span>View</span> <span>Search</span>
Action: payed gift (Remote ID: 232)	Valid	payed gift (ID: 232) <span>View</span> <span>Search</span>
Condition: Order value (promo, all inc) (Remote ID: 126)	Valid	Order value (promo, all inc) (ID: 126) <span>View</span> <span>Search</span>

Accept mapping & import file >

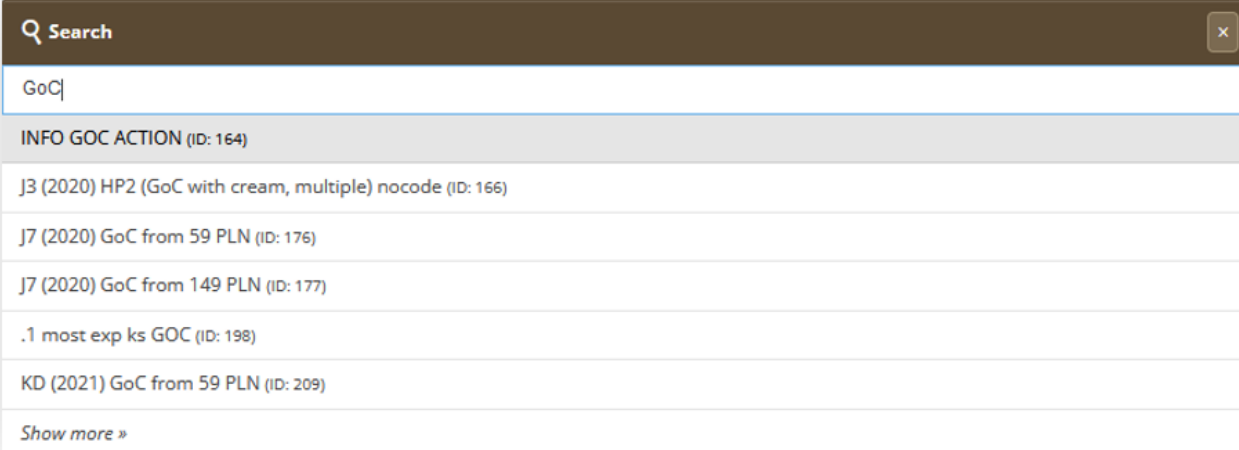
Visualization of the data mapping step

In the data mapping step, there are listed all conditions, actions, and rules that are imported into a selected environment. In this step you can find the following columns:

- **Entity** - Entity type (condition / action / rule), name, and external ID.
- **Status** - Status of the entity after our internal check. If everything is correct the status will be set to **Valid**. If there is an issue with an entity it won't get imported.
- **Local data link** - The system is verifying existing promotions on the environment and if there is a match between the imported one it automatically matches it to the existing one.

If no matches were found it will create a new condition / action / rule. In this column users are able to choose if they want to match the import to the existing promotion, and if so which one, or to create a completely new promotion. Two buttons are available:

- **View** - Is only visible whenever there is a selected match for an entity. This button opens the matched entity, so the user can verify it.
- **Search** - Allows users to search available promotions and select them, so the system will match the imported promotion to the selected one.



The screenshot shows a search modal window with a dark header containing a magnifying glass icon and the word 'Search'. Below the header is a search input field containing the text 'GoC'. Underneath the input field is a list of search results. The first result is highlighted in grey and reads 'INFO GOC ACTION (ID: 164)'. The subsequent results are: 'J3 (2020) HP2 (GoC with cream, multiple) nocode (ID: 166)', 'J7 (2020) GoC from 59 PLN (ID: 176)', 'J7 (2020) GoC from 149 PLN (ID: 177)', '.1 most exp ks GOC (ID: 198)', and 'KD (2021) GoC from 59 PLN (ID: 209)'. At the bottom of the list is a link that says 'Show more »'.

Search Results
GoC
INFO GOC ACTION (ID: 164)
J3 (2020) HP2 (GoC with cream, multiple) nocode (ID: 166)
J7 (2020) GoC from 59 PLN (ID: 176)
J7 (2020) GoC from 149 PLN (ID: 177)
.1 most exp ks GOC (ID: 198)
KD (2021) GoC from 59 PLN (ID: 209)
Show more »

*Visualization of the search functionality*

With all entities verified, we can proceed to the third step by selecting the **Accept mapping & import file.**

### **Warning**

Please verify thoroughly the mapping process, as it is not possible to revert the overwritten mapped conditions / actions / rules.

In the last, third step - **Import** we can see the result of the entity import.

## Import / Entities

Step 1: Select file

Step 2: Data mapping

Step 3: Import

☑ Import has been completed. You can review all the results in the table below.

### Entities (12)

Entity	Status	Link
Action: TG only GoC (Remote ID: 217)	☑ Updated	<a href="#">View</a>
Condition: 2for1test (Remote ID: 111)	☑ Updated	<a href="#">View</a>
Action: KD (2021) GoC from 169 PLN (Remote ID: 214)	☑ Updated	<a href="#">View</a>
Condition: .VPM Order value from promo after discounts (Remote ID: 107)	☑ Updated	<a href="#">View</a>
Action: Name of rule description (Remote ID: 229)	☑ Updated	<a href="#">View</a>
Action: Free delivery (Remote ID: 230)	☑ Updated	<a href="#">View</a>
Condition: Order value (CAT prices, no GP, exc) (Remote ID: 120)	☑ Updated	<a href="#">View</a>
Action: payed gift (Remote ID: 232)	☑ Updated	<a href="#">View</a>
Condition: Order value (promo, all inc) (Remote ID: 126)	☑ Updated	<a href="#">View</a>
Rule: KD (2021) GoC from 169 PLN (Remote ID: 373) 🔔 <b>Information:</b> <ul style="list-style-type: none"><li>Relations to altshops were not modified.</li></ul>	☑ Updated	<a href="#">View</a>
Rule: Free delivery for orders above 500 CZK (Remote ID: 390) 🔔 <b>Information:</b> <ul style="list-style-type: none"><li>Relations to altshops were not modified.</li></ul>	☑ Updated	<a href="#">View</a>
Rule: example rule description (Remote ID: 393) 🔔 <b>Information:</b> <ul style="list-style-type: none"><li>Relations to altshops were not modified.</li></ul>	☑ Updated	<a href="#">View</a>

Visualization of the import step

In this step we can see a table with three columns:

- **Entity** - Entity type (condition / action / rule), name, and external ID. Additionally in this step, we will see **information** regarding the selected entity if some actions couldn't be executed i.e. If the imported entity is imported from PL PROD to CZ PROD there might be a mismatch with used altshops, so in the information tab, we will see information that manual assignment of correct altshops is required for such rule.
- **Status** - Status of the import. If a new entity was **created** it will show Created and if an entity is updating the matched promotion it will say **updated**.
- **Link** - Direct link to created or updated condition / action / rule.

If there are any unexpected errors while importing an entity please contact the Tau Ceti helpdesk at [helpdesk@tauceti.email](mailto:helpdesk@tauceti.email).

Revision #2

Created 27 November 2024 21:06:18 by Tau Ceti

Updated 27 November 2024 21:26:08 by Tau Ceti