

# Using the Advanced Export and Import Feature

## How to Use the Advanced Export and Import Feature

This guide will help walk you through using the advanced export and import feature to help manage data. Before getting started with the Advanced Export and Import Feature, you will need to complete test cases in the Portal.

Logicbroker Stage Portal

## 1. Complete Test Cases in the Portal

**Log into Stage Portal, click on Testing.** You will need to complete 2 test cases. Each test case has step by step instructions to help guide you through the process. Additional information on testing can be found [here](#).

Test Cases for Demo Retailer

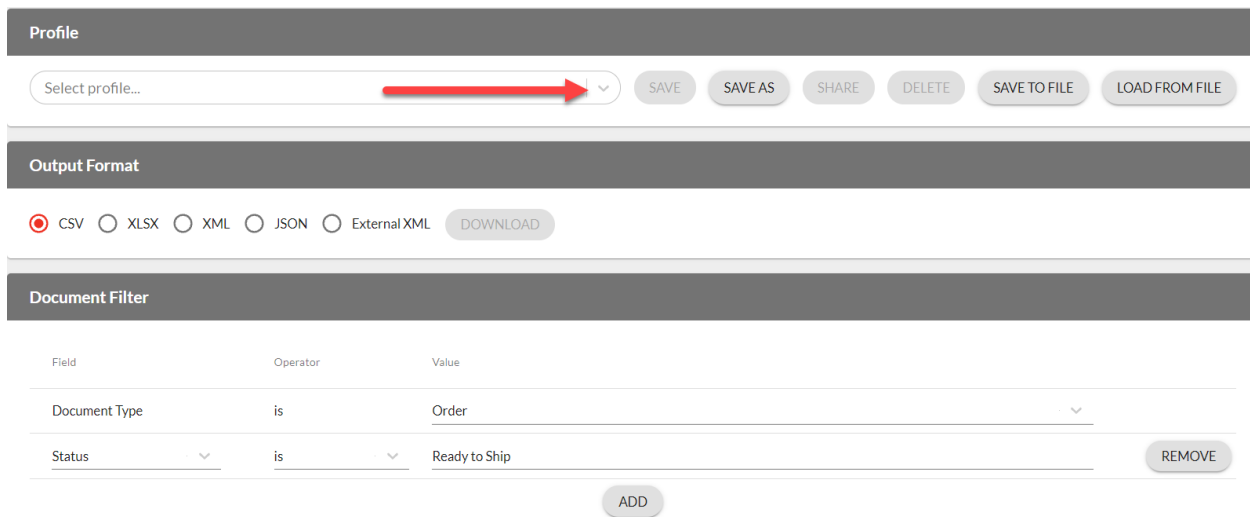
<p><b>TC1 - Multi-Line Order (Fulfill)</b></p> <p>Not sure where to start? Watch this video to see how to complete this test case: <a href="#">Insert Video Link in the href (replace '#')</a>.</p> <p>The purpose of this test case is to completely fulfill a multi-line order from The Retailer. To Complete this test case, you must do the following:</p> <ul style="list-style-type: none"><li>• Submit an Acknowledgment accepting all lines on the from the order.</li><li>• Submit a Shipment for all lines using the requested ship method on the order.</li><li>• Submit an Invoice for all lines from the order.</li></ul> <p><b>Note:</b> Inventory is required to be loaded prior to creating your first test order. Watch a video on how to load inventory: <a href="#">Insert video link in HREF (replace '#')</a>.</p>	<p>In Progress</p> <p><b>CREATE A NEW TEST ORDER</b></p> <p>1 Create a test order</p>
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**TIP** Once testing is complete, you will be ready to go live and start receiving orders in Production!

## 2. Navigate to “Files” and select “Advanced Export”

**A template has been created in Advanced Export.** Select the dropdown and you will see the template titled “titled NBC Order Export\_Shipment Import”. Select this template and output format, you are then able to download your orders.



The screenshot shows the Advanced Export interface with three main sections:

- Profile:** A dropdown menu labeled "Select profile..." with a red arrow pointing to it. To the right are buttons for "SAVE", "SAVE AS", "SHARE", "DELETE", "SAVE TO FILE", and "LOAD FROM FILE".
- Output Format:** Radio buttons for "CSV" (selected), "XLSX", "XML", "JSON", and "External XML", followed by a "DOWNLOAD" button.
- Document Filter:** A table with columns "Field", "Operator", and "Value".

Field	Operator	Value
Document Type	is	Order
Status	is	Ready to Ship

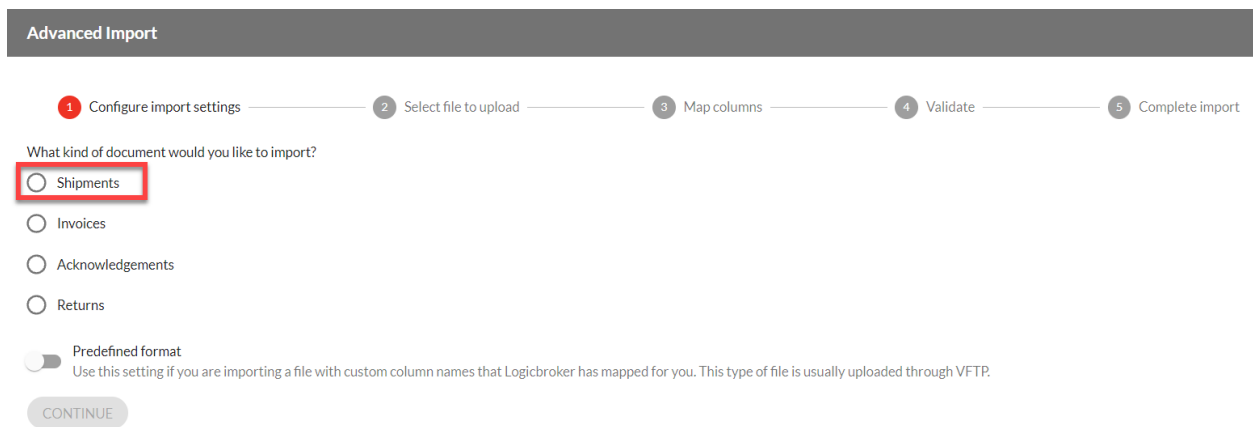
Buttons for "REMOVE" and "ADD" are located below the table.



**Use this template to add Carrier and Tracking information** in the file which will then be imported into the Portal.

### 3. Navigate to “Files” and select “Advanced Import”

Now that you have uploaded all of the data to the template, navigate back to the Portal and select “Files” and “Advanced Import”. Select Shipments as the document import type and click Continue.



Advanced Import

1 Configure import settings — 2 Select file to upload — 3 Map columns — 4 Validate — 5 Complete import

What kind of document would you like to import?

Shipments

Invoices

Acknowledgements

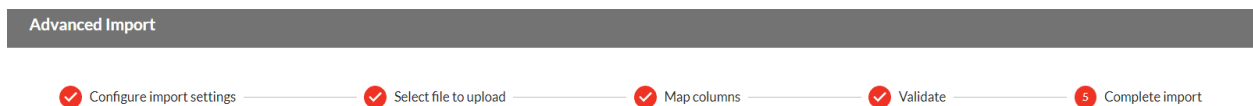
Returns

Predefined format  
Use this setting if you are importing a file with custom column names that Logicbroker has mapped for you. This type of file is usually uploaded through VFTP.

CONTINUE

### 4. Drop the file in the perforated box and click “Continue”

Upload the file into the Portal by dropping it into the perforated box and click continue. This will then import the shipment information and complete the orders.



Advanced Import

✓ Configure import settings — ✓ Select file to upload — ✓ Map columns — ✓ Validate — 5 Complete import

## Need more information?

Visit our [Knowledge Base](#) or log into [Learn Logicbroker](#) for more details on how to optimize your Logicbroker experience.

## Links from this Guide

**Logicbroker Stage Portal**  
<http://stageportal.logicbroker.com>

**Logicbroker Production Portal**  
<http://portal.logicbroker.com>

**Testing Overview**  
<https://help.logicbroker.com/hc/en-us/articles/360022068711-Testing-Overview>

**Advanced Export Feature**  
<https://help.logicbroker.com/hc/en-us/articles/360021857892-Advanced-Export>

**Advanced Import Feature**  
<https://help.logicbroker.com/hc/en-us/articles/360022068651-Advanced-Import#sidenav-article-360022068631>