



Bulk Product Creation and Updates



User Login

User Login

1

STIBO SYSTEMS
MASTER DATA MANAGEMENT

STEP managed user log in
Please log in using the form

Username **2**

Password

Forgot STEP password

Log In

IDP managed user log in
CVS Internal Colleagues - [Click here](#)

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Description / Steps

1. Enter URL for Stibo
2. Suppliers enter your credential, click "Log on"

Product Onboarding – Bulk Product Creation

Stibo Home Screen

Welcome to the STEP Web UI

Self-Help Menu WILLIAM'S TOYS(40196) • Danielle Hammond • English US • Main

Links

- Supplier self onboarding process guidelines
- Link to CVSSuppliers.com
- Advanced Search
- Advanced Search For Product
- Clone Product
- Clone NFR Product
- Import Smartsheet For Bulk Product Creation
- Import Smartsheet For Product Maintenance
- Product Maintenance

New Supplier Onboarding

One Time Agent Verification: 0

Supplier Self OnBoarding: 0

Total: 0

New Agent Onboarding

One Time Agent Verification: 0

Supplier Maintenance

Maintain Supplier Data: 1

Clarification Workflow

Review: 0

Onboard new Product

Create New Product

Product Onboarding - In Progress: 1

Products Sent Back By CA: 1

Products Sent Back By DM: 0

Products Awaiting Content Provider Data: 0

Total: 2

Onboard a New NFR Product

Create a New NFR Product

Product Onboarding - In Progress: 0

Total: 0

Product Maintenance For S...

Product Maintenance: 3

Sent Back: 0

Product NFR Maintenance

Product Maintenance: 0

Product Variant Creation

Create New Product Variant

Variant Creation - In Progress: 0

Variants Sent Back By Digital Merch: 0

Product Variant Maintenance

Variant Maintenance - In Progress: 0

Variants Sent Back By Digital Merch: 0

Product Clarification

Clarification: 0

Bulk Creation Template Exp...

All suppliers

Baby Baths/Bath Chairs/Bath Cr...

Miscellaneous Category

Bulk Creation Template for ...

All suppliers

Export

Manage Your Account

DANIELLE HAMMOND

lyn.hammond@cvshealth.com

User Details

Logout

Asset Import

Primary Asset Importer

Select file

Secondary Images Asset I...

Select file

Select a Leaf Node

Browse Search

- Merchandise (EXT_10002)
 - Arts and Crafts (EXT_10005)
 - Arts/Crafts/Needlework Supplies (EXT_10034)
 - Artists Painting/Drawing Supplies (EXT_10138)
 - Artists Accessories (EXT_10519)**
 - Artists Brushes/Applicators (EXT_10520)
 - Artists Canvases/Pre-primed Boards (EXT_10521)
 - Artists Drawing Boards (EXT_10522)
 - Artists Easels (EXT_10523)
 - Artists Painting/Drawing Supplies Other (EXT_10525)
 - Artists Painting/Drawing Supplies Variety Packs (EXT_10526)

Cancel OK

Description / Steps

Upon login the user will be in the Stibo home screen

1. Scroll to the Onboard Bulk Product Creation widget
2. Click on the hierarchy icon
3. Browse to find the category that you are going to upload. If you are going to upload multiple categories, you can multi-select by holding down the ctrl key.
4. Click on OK

Select a Leaf Node

Browse Search

- Merchandise (EXT_10002)
 - Arts and Crafts (EXT_10005)
 - Baby (EXT_10010)
 - Beauty (EXT_10009)
 - Books and Maps (EXT_10008)
 - Cleaning (EXT_10007)
 - Clothing (EXT_10006)
 - Computers and Accessories (EXT_10011)
 - Electrical Supplies (EXT_10012)
 - Food, Beverages, and Consumables (EXT_10013)
 - Footwear (EXT_10014)

Cancel OK

Product Onboarding – Bulk Product Creation

Stibo Home Screen – Exporting the Smartsheet

Welcome to the STEP Web UI

Self-Help Menu WILLIAM'S TOYS(40196) • Danielle Hammond • English US • Main

Links

- Supplier self onboarding process guidelines
- Link to CVSSuppliers.com
- Advanced Search
- Advanced Search For Product
- Clone Product
- Clone NFR Product
- Import Smartsheet For Bulk Product Creation
- Import Smartsheet For Product Maintenance
- Product COO Documents

New Supplier Onboarding

One Time Agent Verification	0
Supplier Self Onboarding	0
Total	0

New Agent Onboarding

One time Agent Verification	0
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Supplier Maintenance

Maintain Supplier Data	1
------------------------	---

Clarification Workflow

Review	0
--------	---

Onboard new Product

Create New Product	
Product Onboarding - In Progress	1
Products Sent Back By CA	1
Products Sent Back By DM	0
Products Awaiting Content Provider Data	0
Total	2

Onboard a New NFR Product

Create a New NFR Product	
Product Onboarding - In Progress	0
Total	0

Product Maintenance For 5...

Product Maintenance	3
Send Back	0

Product NFR Maintenance

Product Maintenance	0
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Product Variant Creation

Create New Product Variant

Variant Creation - In Progress	0
Variants Sent Back By Digital Merch	0

Product Variant Maintenance

Variant Maintenance - In Progress	0
Variants Sent Back By Digital Merch	0

Product Clarification

Clarification	0
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Bulk Creation Template Export

Artists Accessories;

All suppliers

Baby Baths/Bath Chairs/Bath Cr...

Miscellaneous Category

Export

Bulk Creation Template for ...

All suppliers

Export

Description / Steps

1. The categories are populated in the box.
2. Click on Export.

Tip

There is a miscellaneous Category that you can download that will not contain the Stibo Product Hierarchy attributes. Once the sheet is imported into Stibo, you could complete those attributes for the items.

Product Onboarding – Bulk Product Creation

Exporting the Smartsheet

Description / Steps

Background Process Details

1

2

3

Self-Help Menu TEST SUPPLIER(39486) • Lyn Hammond • English US • Main

ID: 8GP_119172656
Started By: LHAMMOND
Template ID: SheetExporter
Status: ✓ Succeeded
Product Onboarding Smartsheet-2023-08-15_15.52.47.xlsx
Started: N/A
Elapsed: 20 s
Finished: 8/15/23 3:52:50 PM

Product Onboarding
Smartsheet-2023-08-15_15.52.47.xlsx
548 KB • Done

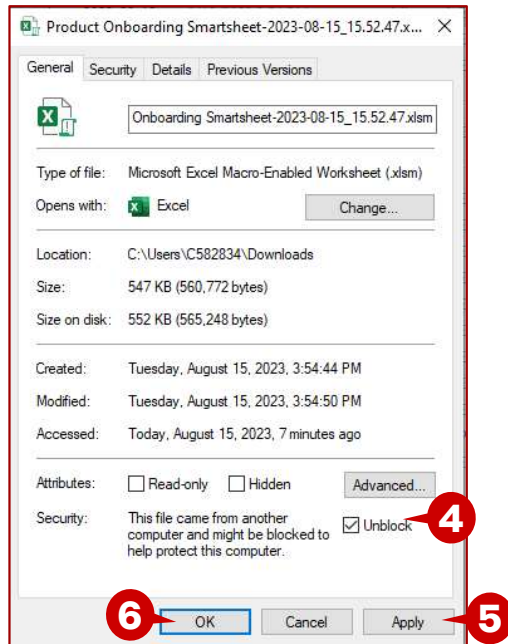
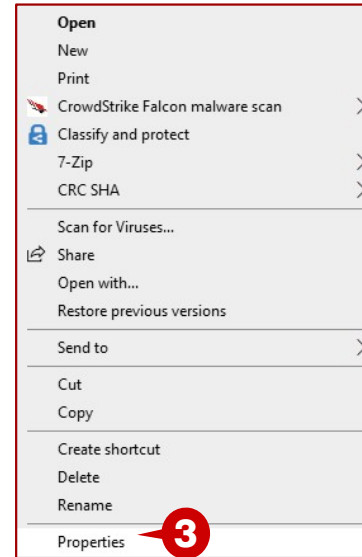
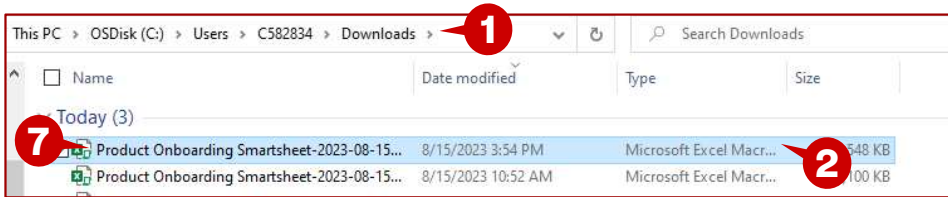
Export

ID	Type	Text
1	Info	Export process started. (Tue Aug 15 15:52:33 EDT 2023)
1778	Info	Logging on to PIM server cis-uat-app2 as LHAMMOND...
3555	Info	Logged on
5332	Info	Analysis started. (Tue Aug 15 15:52:36 EDT 2023)
7109	Info	Finished analyzing a total of 10 objects (including derived nodes) in 0 seconds. (Tue Aug 15 15:52:36 EDT 2023)
8886	Info	Exporter started, exporting 10 data node objects. (Tue Aug 15 15:52:36 EDT 2023)
10663	Info	Finished exporting a total of 10 data node objects in 0 seconds. (Tue Aug 15 15:52:36 EDT 2023)
12440	Info	Exported 0 assets, 0 classifications, 0 entities, and 10 products. (Tue Aug 15 15:52:36 EDT 2023)
14217	Info	Included 0 assets, 0 classifications, 0 entities, and 7 products due to being cross-referenced or parents. (Tue Aug 15 15:52:36 EDT 2023)
15994	Info	Exported 26 values, 71 references/links, 0 data container objects, and 0 tables. (Tue Aug 15 15:52:36 EDT 2023)
17771	Info	Finalized cross-reference times in 1 second. (Tue Aug 15 15:52:36 EDT 2023)

1. The Background Process Details page will open.
2. When the status is Succeeded, click on the blue hyperlink.
3. Click on the folder icon.

Product Onboarding – Bulk Product Creation

Exporting the Smartsheet – Opening the file



Description / Steps

1. The downloads folder opens.
2. Right click on the file.
3. Choose properties.
4. Put a check mark in the Unblock box.
5. Click on Apply.
6. Click on OK.
7. Double click on the file to open the excel file.

Product Onboarding – Import Bulk Creation

Validate Smartsheet

Description / Steps

1. Once all required fields have been completed, click on Validate sheet.
2. Validate Smartsheet Contents box will display.
3. Click OK.
4. A browser window will open – a message will be displayed, close the browser tab
5. Go back to the excel sheet. A login window will be open. Click on Login

1

Product Name	Supplier	UPC Format	List of Product UI	Supplier Brand	Private Label Y/N	Unit Cost	MSRP Amount	Height	Depth	Width	Dimension UOM	Approving Category
Test	WILLIAM'S TOYS(40	EAMUCC-12 (23)	184567890264	CVS		4.99	12.99	1	1	1	IN-INCHES (15)	RPDM CM 1 (RPDM C

2

Validate Smartsheet Contents

Validate only changed products

Validate all product sheets

Validation result

3

OK Cancel

4

STIBO SYSTEMS
MASTER DATA MANAGEMENT

Smartsheet has been authenticated for user DHAMMOND. You may now close this window. To complete the validation, return to Smartsheet and click the Login button.

5

Login

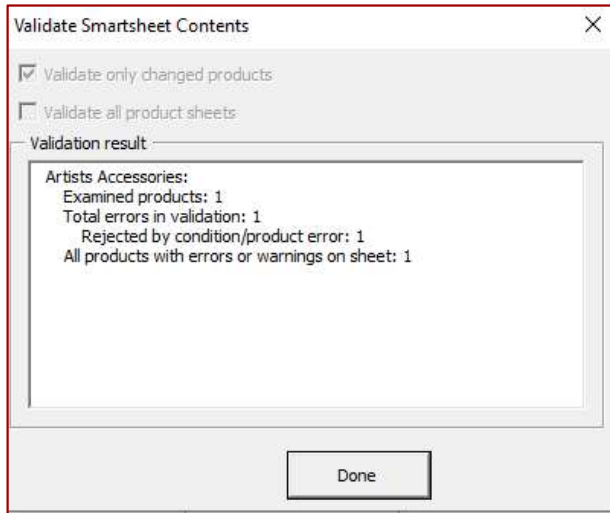
Username: Single SignOn User

Password:

Cancel Login

Product Onboarding – Import Bulk Creation

Validation Results



Description / Steps

1. The sheet will validate and display the Validation result. Click on Done.
2. The row with the error will display in red.
3. Hover over the cell and the errors will be displayed. In this example, there is a UPC error and Product Type is mandatory and cannot be null.
4. Correct the errors and go through the validation process as outlined above.

Product Name	SKU	UPC	Product Type	Supplier Brand	Private Label Y/N	Unit Cost	MSRP Amount	Height	Depth	Width	Dimension UOM	Approving Category
Test		(1)184567890264 is not matching the Format <N>		CVS		4.99	12.99	1	1	1	IN-INCHES (15)	RPDM CM 1 (RPDM CM1)

Product Onboarding – Import Bulk Creation

Stibo Home Screen

The screenshot displays the Stibo Home Screen with a sidebar on the left containing navigation options: Global Search, Tree, Supplier Search, Product Search, and Product Variant Search. The main content area is titled 'Welcome to the STEP Web UI' and features a grid of widgets. A red circle with the number '1' points to the 'Links' widget, which contains a list of links including 'Supplier self onboarding process guidelines', 'Link to CVSSuppliers.com', 'Advanced Search For Product', 'Clone Product', 'Clone NFR Product', 'Import Smartsheet for Bulk Product Creation', and 'Import Smartsheet for Product Maintenance'. A red circle with the number '2' points to the 'Import Smartsheet for Bulk Product Creation' link. Below the grid, there are sections for 'Manage Your Account' (showing user details for Danielle Hammond) and 'Asset Import' (with fields for 'Primary Asset Importer' and 'Secondary Images Asset'). A red box highlights the 'Import Smartsheet' pop-up window, which includes a 'Choose File' button (circled with '3'), a checked 'Import hidden rows' checkbox, and 'Cancel' and 'OK' buttons (circled with '4'). A notification banner at the bottom right shows a message: 'Creation of background process initiated BGP_86575245 (Web UI Smartsheet Import)' with a close button (circled with '5').

Description / Steps

1. Scroll to the Links widget
2. Click on Import Smartsheet for Bulk Product Creation
3. Pop-up window will display.
4. Choose the file for import and click ok.

Product Onboarding – Import – Bulk Creation

Import Process Screen

Creation of background process initiated [BGP_86575245](#) (Web UI Smartsheet Import)

Node Details

Started By: RPDM MDM 1
ID: BGP_86575245
Template ID: Import Manager Pipeline
Status: ✓ Succeeded
Started: 3/29/23 4:03:59 PM
Elapsed: 4 s
Finished: 3/29/23 4:04:00 PM

Export

ID	Type	Text
1	Info	Retrieval started (Wed Mar 29 16:03:59 EDT 2023)
1778	Info	Retrieved 559178 bytes (Wed Mar 29 16:03:59 EDT 2023)
3555	Info	Conversion started (Wed Mar 29 16:03:59 EDT 2023)
5332	Info	Converted 0 objects (Wed Mar 29 16:03:59 EDT 2023)
7109	Info	Logged on
8886	Info	Mapping started (Wed Mar 29 16:04:00 EDT 2023)
10663	Info	Mapping completed (Wed Mar 29 16:04:00 EDT 2023)
12440	Info	Import Started
14217	Info	Logged On
15994	Info	Using Import mode "domain"
17771	Info	Starting first import pass (creating system setup objects)
19548	Info	Starting second import pass (importing data)

Description / Steps

1. Click on the blue hyperlink.
2. This will open the window with the details of the upload.
3. The status will show Succeeded when the import is finished and successful.
4. This the detail pane and can be scrolled to see each of the steps of the import.

Product Onboarding – Bulk Product Updates

Stibo Home Screen

Welcome to the STEP Web UI

Self-Help Menu | Danielle Hammond • English US • Main

Links

- Supplier self onboarding process guidelines
- Link to CVSSuppliers.com
- Advanced Search
- Advanced Search For Product**
- Clone Product
- Clone NFR Product
- Import Smartsheet For Bulk Product Creation
- Import Smartsheet For Product Maintenance

New Supplier Onboarding

One Time Agent Verification	0
Supplier Self Onboarding	0
Total	0

New Agent Onboarding

One time Agent Verification	0
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Supplier Maintenance

Maintain Supplier Data	1
------------------------	---

Clarification Workflow

Review	0
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Onboard new Product

Product Onboarding - In Progress	3
Products Sent Back By CA	0
Products Sent Back By DIM	0
Products Awaiting Content Provider Data	1
Total	4

Onboard a New NFR Product

Product Onboarding - In Progress	0
Total	0

Product Maintenance For S...

Product Maintenance	1
Sent Back	1

Product NFR Maintenance

Product Maintenance	0
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Product Variant Creation

Variant Creation - In Progress	0
Variants Sent Back By Digital Merch	0

Product Variant Maintenance

Variant Maintenance - In Progress	0
Variants Sent Back By Digital Merch	0

Product Clarification

Clarification	0
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Bulk Creation Template Exp...

All suppliers

Bulk Creation Template for ...

All suppliers

Merch Default

Manage Your Account

DANIELLE HAMMOND
lyn.hammond@cvshealth.com

User Details

Description / Steps

1. Go to the Links widget
2. Click on Advanced Search For Product.

Product Maintenance – Bulk Product Updates

Search and Export Screen

The screenshot shows the 'Advanced Search For Product' interface. At the top right, there is a 'Self-Help Menu' button and user information: 'WILLY FOOD CO INC(33664) • Danielle Hammond • English US • Main'. The search criteria are defined by three conditions connected by 'And' operators:

- Condition 1: Object type: BuySide Item (BuySide_Item)
- Condition 2: Search from List: Type in or paste list of entries here. Number of pasted entries: 0. CVS Item Number.
- Condition 3: Attribute: Item Status (AT_ItemStatus) = Active (2). Include inherited values:

Below these conditions is another attribute search for 'RX Product Flag (AT_RXProductFlag)' with a search bar and 'Include inherited values' checkbox. A 'Search' button is located below the search criteria. To the right, a 'My Searches' sidebar shows a saved search: 'Active Item Search For Sup...'. Below the search area is a table with columns: ID, Name, CVS Item Number, Item Brand Type, Category Name, Sub Category Name, and Segment Name. The table contains 8 rows of product data. At the bottom of the table, there are buttons for 'Select all', 'Update Item(s)', and 'Export Smartsheet'. A 'Search' button is also present at the bottom left of the table area. A 'My Searches' sidebar is visible on the right side of the table area.

Description / Steps

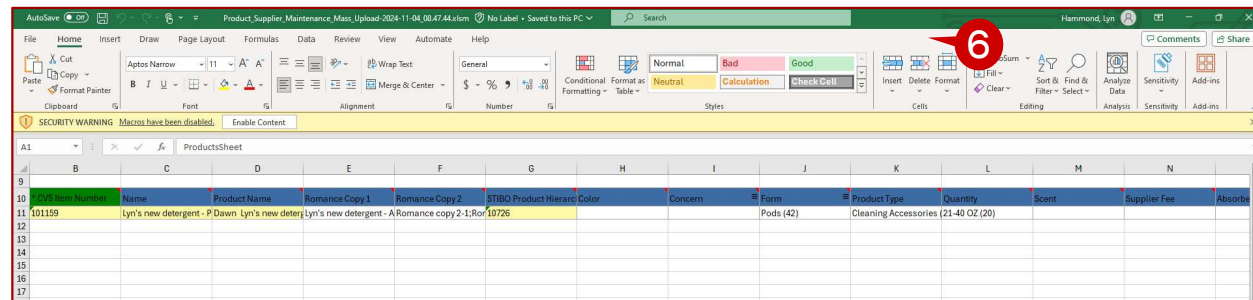
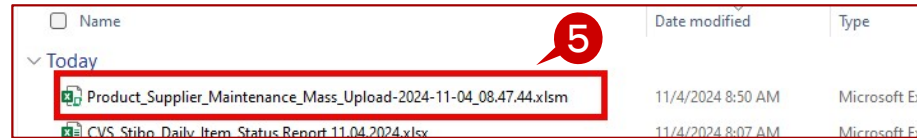
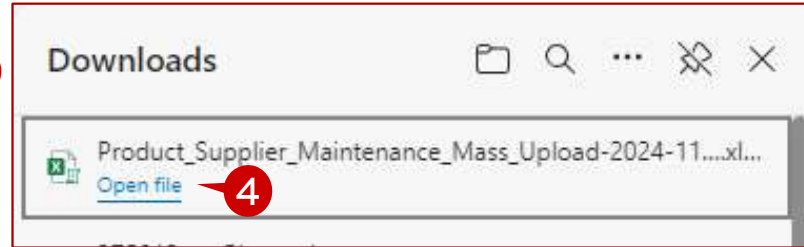
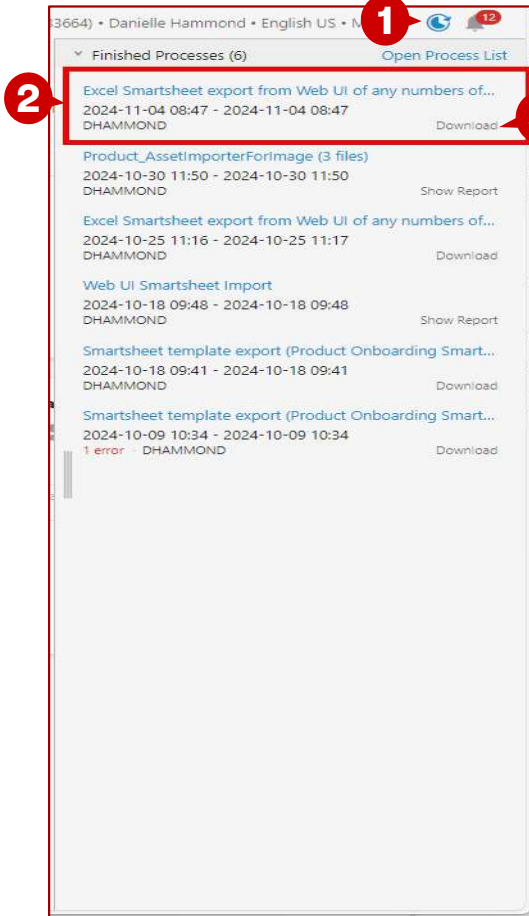
1. Click on Active Item Search
2. This will place the Search Criteria in the search window. Enter the criteria
3. Click on Search
4. Search results will display. Select item(s) for export.
5. Click on Export to Template.
6. The pop-up window will display, click on OK.

The 'Export Smartsheet' pop-up window is shown. It contains the text 'Export Smartsheet' and 'Choose Smartsheet Export Configuration'. A dropdown menu is set to 'Product Supplier Maintenance Export Smartsheet'. At the bottom, there are 'Cancel' and 'OK' buttons.

Product Maintenance – Bulk Product Updates

Product Maintenance – Export to update – con't

Description / Steps



1. Click on the half moon icon.
2. Find the export that you just requested.
3. Click on Download
4. Pop-up window will open and click on Open file. OR
5. The file is in the Downloads folder
6. Open the file, make the updates, and save the file.

Product Maintenance – Import Bulk Updates

Validating the worksheet

4 Smartsheet has been authenticated for user lhammond. You can close this window

Validate sheet						
Next error						
* Product Name	Supplier Product Desc	Projected Supplier Del	Supplier Brand	Sub Brand	Product Title	Product Videos
CVS Artist Accessory	CVS Artist Accessory		NONBRAND		CVS Artist Accessory	
	18456789010928 is already onboarded by supplier Product Type is mandatory and cannot be null					

Description / Steps

1. Validate Smartsheet Contents box will display.
2. The login box will display and will open the browser window to the login page.
3. Enter your login credentials and login.
4. The message will display for you to close the window.
5. Click on Login, once you have closed the browser window.
6. The sheet will validate and display the Validation result. In our example there were no errors. Click on Done.
7. If there are errors, you will see the row with the error will display in red. Hover over the cell and the errors will be displayed. In this example, there is a UPC error and Product Type is mandatory and cannot be null.
8. Correct the errors and go through the validation process as outlined above. Although, you will not have to login again.

Product Maintenance – Bulk Product Update

Stibo Home Screen – Import Bulk Smartsheet

The screenshot shows the Stibo Home Screen with several widgets. A red circle '1' points to the 'Links' widget in the top left. A red circle '2' points to the 'Links' callout box on the right, which lists several options including 'Import Smartsheet For Bulk Product Maintenance'. A red circle '3' points to the 'Import Smartsheet' dialog box, which has 'Choose File' selected. A red circle '4' points to the file 'Product_Supplier_Maintenance_Mass_Upload-2023-08-17_13.51.59.xlsx' in the Downloads folder. A red circle '5' points to the 'Open' button in the file dialog. A red circle '6' points to the 'OK' button in the 'Import Smartsheet' dialog box.

Description / Steps

1. Go back to the Supplier Web Portal home screen and locate the Links widget.
2. Click on Import Smartsheet for Product Maintenance.
3. Click on Choose File.
4. File Open dialog box will display, highlight the file that you just updated and validated.
5. Click on Open.
6. The file name will be in the Import Smartsheet box, click on OK>
7. The background process window will open letting you know that the import process has started.

The screenshot shows the 'Import Smartsheet' dialog box. The 'Select Smartsheet file' section has 'Choose File' selected, and the file name 'Product_Supplier...17_13.51.59.xlsx' is displayed. The 'Import hidden rows' checkbox is checked. The 'OK' button is highlighted with a red circle '6'.

The screenshot shows a background process window titled 'Creation of background process initiated BGP_86575245 (Web UI Smartsheet Import)'. A red circle '7' points to the window's title bar.

Product Maintenance – Import – Bulk Update

Import Process Screen

Creation of background process initiated [BGP_86575245](#) (Web UI Smartsheet Import)

Node Details

Started By: RPDM MDM 1
ID: BGP_86575245
Template ID: Import Manager Pipeline
Status: ✓ Succeeded
Started: 3/29/23 4:03:59 PM
Elapsed: 4 s
Finished: 3/29/23 4:04:00 PM

Export

ID	Type	Text
1	Info	Retrieval started (Wed Mar 29 16:03:59 EDT 2023)
1778	Info	Retrieved 559178 bytes (Wed Mar 29 16:03:59 EDT 2023)
3555	Info	Conversion started (Wed Mar 29 16:03:59 EDT 2023)
5332	Info	Converted 0 objects (Wed Mar 29 16:03:59 EDT 2023)
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10663	Info	Mapping completed (Wed Mar 29 16:04:00 EDT 2023)
12440	Info	Import Started
14217	Info	Logged On
15994	Info	Using Import mode "domain"
17771	Info	Starting first import pass (creating system setup objects)
19548	Info	Starting second import pass (importing data)

Description / Steps

1. Click on the blue hyperlink.
2. This will open the window with the details of the upload.
3. The status will show Succeeded when the import is finished and successful.
4. This the detail pane and can be scrolled to see each of the steps of the import. This would outline any errors that are reported during the upload process.