

# B2B Template

The B2B template for the [import/export tools](#) describes B2B accounts, contacts, purchase order information, and individual users. It contains very similar data as to that found in the Customers Import/Export template.

	A	B	C	D	E	F	G	H	I	J	K	L
1	ExternalId	AccountId	Company Or Organization	Tax Exempt	TaxId	Customer Set	Customer Segments	Total Order Amount	Total Orders	Last Order Date	Last Modified Date	Price list
2		1010	AccountOne	Yes		default		2.07	1		1/9/2019 20:11	
3		1011	POAccount	No		default		0	0		1/9/2019 20:11	
4		1012	POAccount3	No		default		0	0		1/9/2019 20:11	
5		1013	Account3	No		default		0	0		1/9/2019 20:11	
6		1014	Company1	No		default		0	0		1/9/2019 20:11	
7		1015	Company2	No		default		0	0		1/9/2019 20:11	
8		1016	Company3	No		default		0	1		1/9/2019 20:11	
9		1017	Company5	No		default		0	0		1/9/2019 20:11	
10		1018	Company6	Yes	1111	default		946.27	3		1/9/2019 20:11	
11		1019	Company7	Yes		default		0	0		1/9/2019 20:11	
12		1020	Company8	No		default		0	0		1/9/2019 20:11	
13		1021	Company9	No		default		0	0		1/9/2019 20:11	
14		1022	Company10	No		default		0	0		1/9/2019 20:11	
15		1023	Company11	No		default		0	0		1/9/2019 20:11	
16		1024	Company12	Yes		default		2	2		1/9/2019 20:11	
17		1025	Company13	No		default		0	0		1/9/2019 20:11	
18		1028	Company14	Yes	1.11E+14	default		0	0		1/9/2019 20:11	
19		1029	Company15	Yes	1.23E+13	default		0	0		1/9/2019 20:11	
20		1030	Company16	Yes	1.11E+14	default		19.5	1		1/9/2019 20:11	
21		1031	Company17	No		default	Seasonal Shops	8189.16	5		1/9/2019 20:11	
22		1032	Company18	No		default		0	0		1/9/2019 20:11	
23		1033	Company19	No		default		162.79	3		1/9/2019 20:11	
24		1034	Company20	No		default		108.25	1		1/9/2019 20:11	
25		1035	Company21	No		default		0	0		1/9/2019 20:11	
26		1038	Company22	No		default		0	0		1/9/2019 20:11	
27	1012	1042	POAccount3	No		default		0	0		1/9/2019 20:11	
28	1010	1043	AccountOne	Yes		default		0	0		1/9/2019 20:11	
29	1011	1044	POAccount	No		default		0	0		1/9/2019 20:11	

## Access the Tools

With the [Mozu Import-Export Application](#) installed and enabled, go to **Main > B2B > Import/Export** in Kibo eCommerce Admin.

## Supported File Formats

- CSV (.csv):** Each sheet is a separate CSV file. For both imports and exports, sheets are compressed into a ZIP file. When importing, the ZIP file can have any file name but each individual CSV file name must match the export file name and the sheet. You can remove CSV files for data you do not want to import.

These CSV files should not be opened in Excel, as that may cause errors with their formatting. Instead, use a different CSV editing program to make changes to the data.

You should only use the default Windows zipper to zip the files, as using different software may cause errors. You can upload multiple files at once as long as they all are zipped.

## Template Key

For each sheet, we define each column and describe valid values for the column. Some values are not required for an import, but are required Kibo eCommerce data. For example, you do not have to specify a customer's `FirstName` every time you modify the customer account, but all customer accounts require a `FirstName` when they are created.

If you have questions or concerns specific to your data, please contact your integration partner or .

#### Information Provided for Each Sheet of the Template

Corresponding REST API Resource	Every column in a sheet corresponds to a property in the Kibo eCommerce REST API. For each sheet, we provide a link to any API resources that contain properties in the sheet.
Column Name	The name of the column in the sheet.
Description	A description of the data a column contains.
Valid Values	Lists valid values for the column.

## Sheets

### B2BAccounts

Corresponding REST API Resource: [commerce/customer/b2baccounts](#)

This sheet defines the B2B accounts within Kibo eCommerce, which each include an admin user account and may include purchaser and non-purchaser user accounts as detailed in the B2BUsers sheet. See the [B2B user guide](#) for more information about this feature and B2B accounts.

Column Name	Description	Valid Values
ExternalId	A unique identifier you can use to refer to the customer in import/export operations or the Kibo eCommerce API. Typically, this is a value that is used by an external program to identify a customer in Kibo eCommerce. This value is not exposed in Admin.	Any string that is unique among all customer accounts.
AccountId	The unique identifier for the customer account.	Any integer that is unique among all customer accounts. Can be the same or different than the Id.
Company Or Organization	The company or organization the customer works for.	Any string.
TaxId	The tax ID associated with the account.	Any string.
Tax Exempt	Specifies whether the account has tax exempt status.	A Boolean value, specified as <b>Yes</b> or <b>No</b> .

Column Name	Description	Valid Values
Customer Set	<p>The customer set that the customer account belongs to. This field is optional.</p> <p><b>Note:</b> Each unique customer account can only belong to one customer set. For more information, refer to the <a href="#">Customer Sets</a> topic.</p>	<p>The name of the customer set you want to assign the customer account to.</p> <p><b>Note:</b> The customer set must already exist. You cannot create new customer sets through the Kibo eCommerce Import-Export Application.</p>
Customer Segments	The name of the customer segment as it appears in Admin.	Any string.
Total Order Amount	The total amount, in the currency specified by LocaleCode, of all orders that have been processed on this account. This value includes cancellations and refunds.	Any decimal value.
Total Orders	The total number of orders that have been processed on this account.	Any integer value.
Last Order Date	The date and time at which the last order was placed on this account.	A date and time in UTC format.
Last Modified Date	The date and time that the customer account was last edited, either by the customer or by the system.	A date and time in UTC format.
Price List	The code that uniquely identifies the price list in the master catalog.	Any string that is a valid price list code. Codes can be a maximum of 50 characters, and can contain only alphanumeric characters, hyphens, and underscores.

## B2BContacts

Corresponding REST API Resource: [commerce/customer/accounts/contacts](#)

As in the Customers Import/Export template, this sheet defines the contacts for user accounts. Contacts include such information as telephone numbers, shipping and billing addresses, and so on. A single customer account can have

multiple contacts associated with it.

Column Name	Description	Valid Values
ExternalId	A unique identifier you can use to refer to the customer in import/export operations or the Kibo eCommerce API. Typically, this is a value that is used by an external program to identify a customer in Kibo eCommerce. This value is not exposed in Admin.	Any string that is unique among all customer accounts.
AccountID	The unique identifier for the customer account.	Any integer that is unique among all customer accounts. Can be the same or different than the Id.
ContactId	The unique identifier for a specific contact within a customer account. This value is not exposed in Admin.	Any string that is unique among all contact IDs on the tenant. Typically, this will be a number. For accounts with only one contact, the ContactID usually matches the AccountID.
Type	The type of the contact.	A string matching one of the following: <ul style="list-style-type: none"><li>• Shipping</li><li>• Billing</li></ul>
IsPrimary	Specifies whether the contact is the primary contact of the specified Type for the customer account.	A Boolean value, specified as Yes or No .
Company Or Organization	The company or organization associated with the contact. This can differ from the CompanyOrOrganization on the customer account. For example, a customer with an account from Company X might order a product and ship it to Company Y.	Any string.
First Name	The first name for the contact. This can differ from the name on the customer account.	Any string.
Middle Name	The middle name or initial for the contact.	Any string.
Last Name	The last name or surname for the contact.	Any string.

Column Name	Description	Valid Values
Email	The email address associated with the contact.	Any string. Kibo eCommerce does not validate email addresses.
Fax Number	The fax number associated with the contact.	Any string. You can include spaces and characters.
Home Phone	The home phone number associated with the contact.	Any string. You can include spaces and characters.  For a contact to be valid in Kibo eCommerce, it must include at least one of the following: HomePhone, MobilePhone, or WorkPhone.
Mobile Phone	The mobile phone number associated with the contact.	Any string. You can include spaces and characters.  For a contact to be valid in Kibo eCommerce, it must include at least one of the following: HomePhone, MobilePhone, or WorkPhone.
Work Phone	The work phone number associated with the contact.	Any string. You can include spaces and characters.  For a contact to be valid in Kibo eCommerce, it must include at least one of the following: HomePhone, MobilePhone, or WorkPhone.
Address Type	The type of the address, such as Residential or Commercial.	A string matching one of the following: <ul style="list-style-type: none"> <li>Residential</li> <li>Commercial</li> <li>None</li> </ul>
Address1	The first line of the address.	Any string. Character limit: 200.

Column Name	Description	Valid Values
Address2	The second line of the address.	Any string. Character limit: 200.
Address3	The third line of the address.	Any string. Character limit: 200.
Address4	The fourth line of the address.	Any string. Character limit: 200.
City Or Town	The city or town name for the address.	Any string.
State Or Province	The state, province, or territory for the address, typically expressed as a two-letter code. For example, TX.	Any string. You can enter a location outside the US or Canada.
Postal Or ZipCode	The postal code or zip code for the address.	Any string. This can be a full 9-digit code with a dash or an international postal code.
Country Code	The 2-letter ISO country code for the address.	Any 2-letter country code.
Last Modified Date	The date and time that the contact was last edited, either by the customer or by the system.	A date and time in UTC format.

## B2BPurchaseOrderAccounts

Corresponding REST API Resource: [commerce/customer/accounts/purchaseOrder](#)

This sheet defines [purchase order](#) accounts that are enabled on the B2B account.

Column Name	Description	Valid Values
ExternalId	A unique identifier you can use to refer to the customer in import/export operations or the Kibo eCommerce API. Typically, this is a value that is used by an external program to identify a customer in Kibo eCommerce. This value is not exposed in Admin.	Any string that is unique among all customer accounts.
AccountId	The unique identifier for the customer account.	Any integer that is unique among all customer accounts. Can be the same or different than the Id.

Column Name	Description	Valid Values
Enabled	Whether purchase orders are enabled as a payment method for the customer account.	Yes or No .
Credit Limit	The total the customer can spend using purchase orders.	Any decimal amount.
Overdraft Allowance Type	Specifies the type and units of the <code>overdraftAllowance</code> amount.	<p><code>Amount</code> – specifies that the overdraft allowance amount is a decimal amount.</p> <p><code>Percent</code> – specifies that the overdraft allowance amount is a percentage amount.</p>
Overdraft Allowance	The total monetary amount or percentage the customer can spend over their purchase order credit limit. The overdraft allowance type controls whether this value is an amount or a percentage.	Any decimal amount.
Available Balance	The available balance the customer has on their purchase order account. This balance is the result of the credit limit minus the customer's total amount due.	Any decimal amount.

## B2BPurchaseOrderPaymentTerms

Corresponding REST API Resource: [commerce/customer/accounts/purchaseOrder](#)

This sheet allows you to assign [payment terms](#) within the B2B account to specific customer accounts.

Column Name	Description	Valid Values
ExternalId	A unique identifier you can use to refer to the customer in import/export operations or the Kibo eCommerce API. Typically, this is a value that is used by an external program to identify a customer in Kibo eCommerce. This value is not exposed in Admin.	Any string that is unique among all customer accounts.

Column Name	Description	Valid Values
AccountID	The unique identifier for the customer account.	Any integer that is unique among all customer accounts. Can be the same or different than the Id.
SiteId	The unique identifier for a site.	Any number. This number must be unique among your sites.
Site Name	The name of a site.	Any string.
Code	User-defined code that uniquely identifies the payment term.	Any string.

## B2BPurchaseOrderTransactions

Corresponding REST API Resource: [GetCustomerPurchaseOrderTransactions](#)

This sheet defines [purchase order](#) transactions for B2B customer accounts.

Column Name	Description	Valid Values
AccountID	The unique identifier for the customer account.	Any integer that is unique among all customer accounts. Can be the same or different than the Id.
Site Name	The name of a site.	Any string.
Order Number	The order number that the customer sees on the storefront when they place the order.	Any integer that is unique among all order numbers.
Order Type	Specifies how the order was placed.	Either <b>Offline</b> or <b>Online</b> .
Purchase Order Number	A unique identifier for the purchase order.	Any alphanumeric string.
Transaction Amount	The amount of the purchase order transaction.	Any decimal value. A positive value increases the customer's available balance, while a negative number decreases the available balance.



Column Name	Description	Valid Values
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Transaction Type Id	A number that identifies the type of transaction and displays it within the purchase orders transaction log.	<p>The following list describes the types of transactions each number corresponds to:</p> <ul style="list-style-type: none"> <li>1 – Line of Credit Change</li> <li>2 – Payment Requested</li> <li>3 – Payment Collected</li> <li>4 – Payment Voided</li> <li>5 – Payment Refund</li> <li>6 – Manual Adjustment</li> </ul>
Transaction Description	The string that describes the transaction type in the purchase orders transaction log.	<p>This field is read-only and corresponds to the transaction type ID:</p> <ul style="list-style-type: none"> <li>1 – Line of Credit Change</li> <li>2 – Payment Requested</li> <li>3 – Payment Collected</li> <li>4 – Payment Voided</li> <li>5 – Payment Refund</li> <li>6 – Manual Adjustment</li> </ul>

Column Name	Description	Valid Values
Author	The author of the purchase order transaction.	A string that corresponds to the Admin user name of the transaction author or to the name of the API version or application that created the transaction.
Transaction Date	The date the transaction took place.	A date. For example, 6/8/2016 7:35:23 PM .
Additional Transaction Detail	Additional transaction details or notes that you want to associate with the transaction.	Any string.
Credit Limit	The total the customer can spend using purchase orders.	Any decimal amount.
Available Balance	The available balance the customer has on their purchase order account. This balance is the result of the credit limit minus the customer's total amount due.	Any decimal amount.

## B2BUsers

Corresponding REST API Resource: [commerce/customer/b2baccounts](#)

This sheet details the individual users of a shared B2B account, denoting their unique information and role (admin, purchaser, non-purchaser) information.

Column Name	Description	Valid Values
ExternalAccountId	A unique identifier you can use to refer to the customer in import/export operations or the Kibo eCommerce API. Typically, this is a value that is used by an external program to identify a customer in Kibo eCommerce. This value is not exposed in Admin.	Any string that is unique among all customer accounts.

Column Name	Description	Valid Values
AccountId	The unique identifier for the customer account.	Any integer that is unique among all customer accounts. Can be the same or different than the Id.
ExternalUserId		
UserId	The unique identifier for the user.	Any integer that is unique among all users.
UserName	The username the customer uses to log in to the account.	Any string. If empty, the username defaults to the Email.
EmailAddress	The email address associated with the account.	Any string. The email address should be unique across all registered customer accounts. A Kibo eCommerce customer cannot create two separate registered accounts linked to the same email address. However, for import operations, you can use the same email address any number of times, provided it is associated with a unique AccountID each time. Also, customers who check out as guests can use the same email address any number of times.
firstName	The first name on the account.	Any string.
lastName	The last name on the account.	Any string.
localeCode	The code denoting the location of the user, for language and currency purposes.	Any valid locale code.
isLocked	Specifies whether the account is locked or not.	A Boolean value, specified as <b>TRUE</b> or <b>FALSE</b> .
isActive	Specifies whether the account is active or not.	A Boolean value, specified as <b>TRUE</b> or <b>FALSE</b> .
isRemoved	Specifies whether the account is removed or not.	A Boolean value, specified as <b>TRUE</b> or <b>FALSE</b> .
Accepts Marketing	Specifies whether the customer has agreed to receive marketing communications.	A Boolean value, specified as <b>Yes</b> or <b>No</b> .

Column Name	Description	Valid Values
RoleList	A code denoting the user's B2B role and permission type (e.g. "1" for an Admin).	An integer (1, 2, or 3).
ExternalPassword	The password for the account. Setting a password creates a registered customer account.	Any string.