

# Module 17 Import/Export with CSVs

### Module 17: Import/Export with CSVs

#### ☐ Introduction

There are many ways to leverage the Import/Export features including bulk updating a product catalog, adding new products or inventory, creating and updating customer accounts, segmenting and exporting customers for targeted marketing campaigns, importing inventory from dropshippers, importing tracking numbers from wholesalers and creating data backups.

In this module you will identify some objects that can be exported, and create new products with options, SKUs, and images by importing a CSV file.

### LearningObjectives

After completing this module, you should be able to:

- Identify items that can be imported using a CSV file
- Identify items that can be exported using a CSV file
- Describe a few common uses of importing and exporting CSV files
- Describe the step of matching fields in a CSV file to fields in BigCommerce
- Export products in the Bulk Edit format
- Identify required and suggested attributes when importing products
- Differentiate between products, SKUs, and Rules in a CSV file
- Describe the behavior of settings on the import tool
- Locate errors generated during an import
- Export products using a template that can be imported into another store
- Save large exported files to BigCommerce servers and download them using WebDAV
- Update existing products using a CSV file
- Create new products using a CSV file
- Upload product images using WebDAV to the /product\_images/import directory
- Attach images uploaded via WebDAV to products by importing a CSV file
- Attach images using a publicly accessible URL to products by importing a CSV file
- Create SKUs by importing a CSV file
- Create options by importing a CSV file
- Create Rules by importing a CSV file

🗕 Lessons

This module includes the following lessons:

Lessons
Lesson 1: Intro to Importing and Exporting with CSVs
Lesson 2: Importing Products
Lesson 3: Importing Products Practice
Lesson 4: Importing Product Images Practice
Lesson 5: Importing Product Options Practice

### Import/Export with CSVs Lesson 01: Intro to Importing and Exporting with CSVs

#### ■ Introduction

A CSV file is a comma separated values file which allows data to be saved in a table structured format. CSVs look like a garden-variety spreadsheet but with a .csv extension. Traditionally, they take the form of a text file containing information separated by commas, hence the name.

CSV files can be used with any spreadsheet program, such as Microsoft Excel, Apple's Numbers, Open Office Calc or Google Spreadsheets. They differ from other spreadsheet file types in that you can only have a single sheet in a file — they can not save cell, column or row styling, and can not save formulas.

In this lesson you will identify importable and exportable items, reasons for importing and exporting them and start examining how to import CSV files.

#### Learning **Objectives**

After completing this lesson, you should be able to:

- Identify items that can be imported using a CSV file
- Identify items that can be exported using a CSV file
- Describe a few common uses of importing and exporting CSV files
- Describe the step of matching fields in a CSV file to fields in BigCommerce

#### Content

This lesson includes the following content:

Content
Video: Importing and Exporting CSVs
Q&A Activity: Importing and Exporting with CSV files

#### ☐ Reference

This lesson may reference the following content			
Reference			
KB Article: Import Export Overview			
https://support.bigcommerce.com/articles/Public/Import-Export-Overview/			
KB Guide: Guide to Import/Export			
https://support.bigcommerce.com/articles/Learning/Import-Export-Essentials/			
KB Guide: What Can Be Imported and Exported?			
https://support.bigcommerce.com/articles/Learning/What-Can-Be-Imported-and-Exported			
KB Guide: Importing Basics			
https://support.bigcommerce.com/articles/Learning/Importing-Basics			
KB Guide: Common Ways to Leverage Import/Export			
https://support.bigcommerce.com/articles/Learning/Common-Ways-to-Leverage-Import-Export			

### Video: Importing and Exporting CSVs

□ Video	Watch the <i>Video: Importing and Exporting CSV</i> s video on YouTube: <a href="https://youtu.be/4DcsHW2SQL8">https://youtu.be/4DcsHW2SQL8</a>
☐ Notes	Use the area below for writing down any notes or key takeaways from the video:

### Q&A: Importing and Exporting with CSV Files

<b>Duration:</b> 5 minutes <b>Instructions</b> Use the articles and guides in the Reference section of this lesson to answer the following questions.						
2.	Describe a few uses of Importing or Exporting data with CSV files.					
3.	Merchants are often provided with data in a CSV file created by a manufacturer, distributor or another ecommerce platform that needs to be imported into BigCommerce. When importing a CSV file like these that was not created using the Bulk Edit template provided by BigCommerce, what additional recommended step should be taken before starting the import?					

# Import/Export with CSVs Lesson 02: Importing Products

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Importing your products is the fastest way to create or update products in bulk. A product import involves having your product information in a CSV file, which can be edited as a spreadsheet. Upon import, your column headers will be matched with their corresponding product attributes in BigCommerce, and the product information will be updated accordingly.

In this lesson you will export products, examine product attributes in the CSV file and get acquainted with the import tool.

LearningObjectives

After completing this lesson, you should be able to:

- Export products in the Bulk Edit format
- Identify required and suggested attributes when importing products
- Differentiate between products, SKUs, and Rules in a CSV file
- Describe the behavior of settings on the import tool
- Locate errors generated during an import

Content

This lesson includes the following content:

#### Content

**Q&A Activity: Importing Products** 

Reference

This lesson may reference the following content

#### Reference

KB Article: Import/Export Overview

https://support.bigcommerce.com/articles/Public/Importing-Data

KB Article: Importing and Exporting Products > Import Products

 $\underline{https://support.bigcommerce.com/articles/Public/Importing-Exporting-Products/\#product-importing-Products/\#product-importing-Products/\#product-importing-Products/\#product-importing-Products/\#product-importing-Products/\#product-importing-Products/\#product-importing-Products/\#product-importing-Products/\#product-importing-Products/\#product-importing-Products/\#product-importing-Products/\#product-importing-Products/\#product-importing-Products/\#product-importing-Products/\#product-importing-Products/\#product-importing-Products/\#product-importing-Products/\#product-importing-Products/#product-importing-Products/#product-importing-Products/#product-importing-Products/#product-importing-Products/#product-importing-Products/#product-importing-Products/#product-importing-Products/#product-importing-Products/#product-importing-Products/#product-importing-Products/#product-importing-Products/#product-importing-Products/#product-importing-Products/#product-importing-Products/#product-importing-Products/#product-importing-Products/#product-importing-Products/#product-importing-Product-importing-Product-importing-Product-importing-Product-importing-Product-importing-Product-importing-Product-importing-Product-importing-Product-importing-Product-importing-Product-importing-Product-importing-Product-importing-Product-importing-Product-importing-Product-importing-Product-importing-Product-importing-Im$ 

KB Article: Importing and Exporting Products > Creating New Products Using Import/Export

https://support.bigcommerce.com/articles/Public/Importing-Exporting-Products#new-products

**KB Article: Importing Product Options** 

 $\underline{https://support.bigcommerce.com/articles/Public/Importing-Product-Options}$ 

KB Article: Common Ways to Leverage Import/Export > Updating Products

https://support.bigcommerce.com/articles/Learning/Common-Ways-to-Leverage-Import-Export/

### **Q&A: Importing Products**

**Duration:** 5 minutes

#### **Instructions**

Use the articles and guides in the Reference section of this lesson to answer the following questions.

- 1. If you are updating, backing up, or transferring your products, we recommend exporting your products using the Bulk Edit template. Why?
- 2. What is a scenario where a merchant would want to check the "Delete existing images" checkbox? (Note: It is recommended to leave this box unchecked in almost every case)
- 3. When importing a CSV file to create a new product, which field must be left blank?
- 4. What are the three possible values in the Item Type column in the Bulk Edit template?
- 5. Below is an image taken from the first three columns of a CSV file in the Bulk Edit template. Do the SKUs and Rules belong to the Kolache or the Fancy Cupcake?

Item Type	Product ID	Product Name
Product	118	Kolache
SKU	131	[RT]Choose A Filling=Strawberry,[CS]Choose a Color for the Wrapper=Blue:#0000FF
SKU	132	[RT]Choose A Filling=Vanilla,[CS]Choose a Color for the Wrapper=Blue:#0000FF
SKU	133	[RT]Choose A Filling=Chocolate,[CS]Choose a Color for the Wrapper=Blue:#0000FF
SKU	134	[RT]Choose A Filling=Strawberry,[CS]Choose a Color for the Wrapper=Red:#fc0303
SKU	135	[RT]Choose A Filling=Vanilla,[CS]Choose a Color for the Wrapper=Red:#fc0303
SKU	136	[RT]Choose A Filling=Chocolate,[CS]Choose a Color for the Wrapper=Red:#fc0303
SKU	137	[RT]Choose A Filling=Strawberry,[CS]Choose a Color for the Wrapper=Giraffe Print:108.preview.jpg
SKU	138	[RT]Choose A Filling=Vanilla,[CS]Choose a Color for the Wrapper=Giraffe Print:108.preview.jpg
SKU	139	[RT]Choose A Filling=Chocolate,[CS]Choose a Color for the Wrapper=Giraffe Print:108.preview.jpg
Rule	4	
Rule	5	[CS]Choose a Color for the Wrapper=Blue:#0000FF
Rule	6	[CS]Choose a Color for the Wrapper=Red:#fc0303
Rule	7	[CS]Choose a Color for the Wrapper=Giraffe Print:108.preview.jpg
Product	119	Fancy Cupcake

6. What should be the value of the Category column when a product belongs to a parent category called Baked Goods, and a child of Baked Goods called Cupcakes?



### Import/Export with CSVs Lesson 03: **Importing Products Practice**

Now that you've learned some import/export basics, it's time to try it out. In this lesson you □ Introduction will export products using a custom template, export products to a BigCommerce server, and update a CSV file to create new products. After completing this lesson, you should be able to: ☐ Learning Objectives Export products using a template that can be imported into another store Save large exported files to BigCommerce servers and download them using WebDAV Update existing products using a CSV file Create new products using a CSV file This lesson includes the following content: Content Content Lab Activity: Importing Products This lesson may reference the following content □ Reference Reference KB Article: Importing and Exporting Products > Import Products

https://support.bigcommerce.com/articles/Public/Importing-Exporting-Products/#product-import

KB Article: Creating New Products Using Import/Export

https://support.bigcommerce.com/articles/Public/Creating-New-Products-Using-Import-Export

KB Article: Importing and Exporting Products > Creating New Products Using Import/Export

https://support.bigcommerce.com/articles/Public/Importing-Exporting-Products#new-products

KB Article: Common Ways to Leverage Import/Export > Updating Products

https://support.bigcommerce.com/articles/Learning/Common-Ways-to-Leverage-Import-Export/

KB Article: How do I transfer products from one store to another?

https://support.bigcommerce.com/articles/Public/How-do-I-transfer-products-from-one-store-to-a nother/

KB Article: Backing Up Your Store

https://support.bigcommerce.com/articles/Public/Backing-Up-Your-Store/

KB Article: File Access (WebDAV)

https://support.bigcommerce.com/articles/Public/File-Access-WebDAV/

### **Build-A-Store: Importing Products**

**Duration:** 20 minutes

#### In this lab you will...

- Export products in the Bulk Edit template
- Download the CSV using WebDAV
- Update the name, price, and page title of a product
- Add a row to create a new simple product
- Import the CSV file

#### **Prerequisites**

1. Build-A-Store: Create Product Options

#### **Complete These Steps**

Export products in the Bulk Edit template



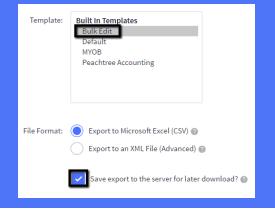
When updating, backing up, or transferring products, BigCommerce recommends exporting your products using the Bulk Edit template. This will provide you with the same column headers used by BigCommerce, which will streamline the update process.

In this exercise, you will update an existing product and create a new product using the Bulk Edit template.

- a. Navigate to Products > Export
- b. **Select** Bulk Edit in the Template list
- c. **Check** the Save export to the server for later download? Checkbox



For this exercise, the file will be saved to the server to allow for practice opening a WebDAV connection.



- d. Click the Continue button
- e. Click the Export my products to a CSV file link

#### 2. **Download** the CSV file using WebDAV

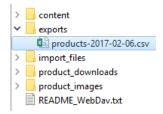
a. If you do not already have a WebDAV client installed, install one such as CyberDuck or BitKinex now



More information on WebDAV clients and links to instructions for connecting with each program can be found in the "Connecting to WebDAV" KB article:

https://support.bigcommerce.com/articles/Public/Connecting-to-WebDav/

- b. Connect to your store using your preferred WebDAV client
  - i. WebDAV credentials can be located by navigating to *Server Settings > File Access (WebDAV)* in the store's control panel
  - ii. Instructions for opening WebDAV connections can be found at https://support.bigcommerce.com
- c. **Download** the CSV file in the /exports directory named products-YYYY-MM-DD.csv

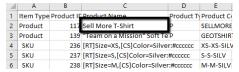


- 3. **Update** the name, price, and page title of a product
  - a. **Open** the CSV file downloaded in the previous steps using a spreadsheet program like Excel
  - b. Update a product's name
    - i. **Locate** the name of a product you would like to update in column C (Product Name)



Ensure Column A (Item Type) is set to Product, otherwise you may be updating a SKU or Rule.

ii. **Type** a new product name into the cell



- c. **Update** the product's price
  - i. **Locate** the price of the product you would like to update in column K (Price)
  - ii. **Type** a new price



- d. **Update** a product's page title
  - i. Scroll right and **locate** the column with the header *Page Title*
  - ii. **Type** a new page title





In this screenshot, the *Page Title* column is column AS. However, this location may vary depending on how many images are used on your products.

e. Save the updated CSV file

#### 4. Add a row to create a new simple product



In this step, you will create a new product with only the required fields. However, try to make this a product that you can add variations to later, like a shirt with various sizes and colors.

- a. **Scroll** to the bottom of the spreadsheet until an empty row is visible
- b. **Enter** the following information in the blank row:
  - i. **Column A** (Item Type): *Product*
  - ii. Column C (Product Name): The name of your new product
  - iii. Column K (Price): The price of your product
  - iv. Column R (Product Weight): The weight of your product
  - v. **Column V** (Allow Purchases?): *Y*
  - vi. **Column AB** (Category): The category or categories for your product



Category names must follow a specific format. Categories are separated using semicolons (;) and subcategories are identified using slashes (/). For example:

Category1; Category2/Subcategory1; Category2/Subcategory2

A product with this string in the Category column would live in 3 categories:

- 1. Category 1
- 2. Subcategory 1
- 3. Subcategory 2

It would not live in Category 2

c. **Save** the updated CSV file

#### 5. Import the CSV file

- a. **Navigate** to *Products > Import* in the store's control panel
- b. **Choose** your file in the *Upload a CSV file from my computer* option
- c. **Check** File was exporting using the 'Bulk Edit' template option
- d. Click the Next button
- e. On the Link Import Fields step, click the Next button

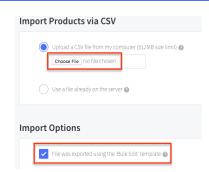


Because the file is using the Bulk Edit template and *Bulk Edit Re-Import* was checked, import fields should be automatically linked

- f. **Click** the *Start Import* button
- g. **Review** the *Import Complete* page
- i. Click the More Information link to the right of 1 product was not able to be fully imported

You should see an error message stating <-- Invalid track inventory value ignored. This is in reference to column Y (Track Inventory). What are the values that can be used in this column?

- ii. Click the View Imported Products link
- iii. **Confirm** your updates were applied and the new product was created



# Import/Export with CSVs Lesson 04: Importing Product Images Practice

### ☐ Introduction

You can include product images when importing your products in one of two ways, depending on how the images are stored. If your product images are already on the internet and you know the URL, you can import them using the image path in the CSV File. If your products are on your computer, we recommend uploading them through WebDAV instead. Pictures will be copied from these sources into your store's directory.

In this lesson you will import product images uploaded via WebDAV and product images accessible from a public URL.

### LearningObjectives

After completing this lesson, you should be able to:

- Upload product images using WebDAV to the /product\_images/import directory
- Attach images uploaded via WebDAV to products by importing a CSV file
- Attach images using a publicly accessible URL to products by importing a CSV file

#### Content

This lesson includes the following content:

#### Content

Lab Activity: Importing Product Images

#### □ Reference

This lesson may reference the following content

#### Reference

KB Article: File Access (WebDAV)

https://support.bigcommerce.com/articles/Public/File-Access-WebDAV/

KB Article: Importing and Exporting Products > Importing Product Images

https://support.bigcommerce.com/articles/Public/Importing-Exporting-Products/#import-images

### Build-A-Store: Importing Product Images

**Duration:** 10 minutes

#### In this lab you will...

- Upload an image via WebDAV
- Export a single product to a CSV file
- Reference the image uploaded via WebDAV
- Reference a publicly accessible image
- Import the CSV

#### **Prerequisites**

1. Build-A-Store: Importing Products

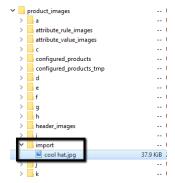
#### Complete These Steps

#### 1. Upload an image via WebDAV

- a. If you do not already have one, **locate** and **download** an image you would like to add to the product created in the *Build-A-Store*: *Importing Products* activity
- b. Connect to your store using your preferred WebDAV client
  - i. WebDAV credentials can be located by navigating to Server Settings > File Access (WebDAV) in the store's control panel
    - ii. Instructions for opening WebDAV connections can be found

at https://support.bigcommerce.com

c. **Upload** the image to the /product\_images/import directory



#### 2. Export a single product to a CSV file

- a. Navigate to Products > View
- b. **Check** the checkbox to the left of the product name you created in the *Build-A-Store: Importing Products* activity



- c. **Select** Export These Products from the Choose an Action dropdown
- d. Click the Confirm button
- e. **Select** Bulk Edit in the Template list
- f. **Click** the *Continue* button
- g. Click the Export my products to a CSV file link
- h. **Click** the *Download my Products* file link

#### 3. Reference the image uploaded via WebDAV

- a. Open the CSV file downloaded in the previous steps using a spreadsheet program like Excel
  - i. There should only be 2 rows in the spreadsheet
- b. In column AD (Product Image File 1), type the name of the file uploaded via WebDAV
- c. In column AE (Product Image Description -1), type an image description

d. In column AF (Product Image Is Thumbnail - 1), type Y

AA	AB	AC	AD	AE	AF	AG
Low Stock	Category	Product Image ID - 1	Product Image File - 1	Product Image Description - 1	Product Image Is Thumbnail - 1	Product Image Sort - 1
0	Men/Acce	ssories;Women/Acce	cool hat.jpg	Image of a cool hat with turkey le	Y	

e. Save the updated CSV file

#### 4. Reference a publicly accessible image

- a. Locate and copy a publicly accessible URL for an image file
  - i. The URL should point directly to the image, not a page that displays the image
  - ii. The URL should end with a file extension like .png or .jpg, or the file extension should be the last portion of the URL before a question mark

/uploads/2014/12/food-hat-2.jpg ?x55630

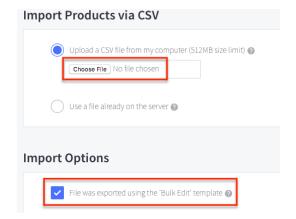
- b. If there is no *Product Image File 2* column, **insert** a new column after column AG (Product Image Sort 1) and **type**Product Image File 2 into the column header
- c. Paste the URL of the image file into column AH (Product Image File -2)



d. Save the updated CSV file

#### Import the CSV

- a. **Navigate** to *Products > Import* in the store's control panel
- b. **Choose** your file in the *Upload a CSV file from my computer* option
- c. **Check** File was exporting using the 'Bulk Edit' template option
- d. Click the Next button
- e. On the Link Import Fields step, **click** the Next button





Because the file is using the Bulk Edit template and *Bulk Edit Re-Import* was checked, import fields should be automatically linked

- f. **Click** the *Start Import* button
- g. **Click** the *View Imported Products* link
- h. **Confirm** both images were attached to the product

The Product I	mage ID - 1 column was left blank. Why?	

# Import/Export with CSVs Lesson 05: Importing Product Options

☐ Introduction	Importing your options is an efficient way to handle the sometimes lengthy task of adding product options to each of your products. Only Checkbox, Multiple Choice, Product List, and Color Swatch options can be imported using a CSV. This is because it is not actually the options themselves being imported, but rather the SKUs attached to options. Customizable option types, like a text field or file upload field, that cannot have SKUs assigned to them cannot be created during an import. The techniques covered in this lesson should not be conflated with the Import Product SKUs feature that is primarily used to update stock levels. In this lesson you will create SKUs, options, and rules by importing a CSV file.
☐ Learning Objectives	<ul> <li>After completing this lesson, you should be able to:</li> <li>Create SKUs by importing a CSV file</li> <li>Create options by importing a CSV file</li> <li>Create Rules by importing a CSV file</li> </ul>
☐ Content	This lesson includes the following content:
	Content
	Lab Activity: Importing Product Options
☐ Reference	This lesson may reference the following content
	Reference
	KB Article: Importing Product Options
	https://support.bigcommerce.com/articles/Public/Importing-Product-Options/

### **Build-A-Store: Importing Product Options**

**Duration:** 30 minutes

#### In this lab you will...

- Export a single product to a CSV file
- Add 6 rows for SKUs
- Complete the Product Name attributes for the SKUs
- Add rules
- Import the CSV

#### **Prerequisites**

- 1. Build-A-Store: Importing Products
- 2. Build-A-Store: Importing Product Images

#### **Background**

If the activity requires an introduction, add it here in paragraph form. If you need more than one paragraph, use them, but your intro is probably too long.

#### Complete These Steps

#### 1. **Export** a single product to a CSV file

- a. **Navigate** to *Products > View*
- b. Check the checkbox to the left of the product name you created in the Build-A-Store: Importing Products activity



- c. **Select** Export These Products from the Choose an Action dropdown
- d. Click the Confirm button
- e. **Select** Bulk Edit in the Template list
- f. Click the Continue button
- g. Click the Export my products to a CSV file link
- h. **Click** the *Download my Products* file link

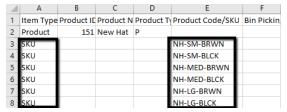
#### 2. Add 6 rows for SKUs



In this activity, you will create six variations of your base product. This will result in the creation of a new option set that contains:

- One Size option with three values (Small, Medium, and Large)
- One Color option with two values (Brown and Black)
- a. Open the CSV file downloaded in the previous steps using a spreadsheet program like Excel
  - i. There should only be 2 rows in the spreadsheet
- b. In column H (Option Set) for row 2, type the name you would like to use for a new option set
- c. **Type** SKU into column A (Item Type) on rows 3-8

d. **Type** SKUs that correspond to the combinations of color and size in column E (Product Code/SKU) on rows 3-8

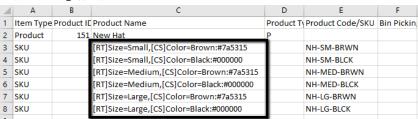




You do not need to use the SKUs in the screenshot above, but make sure you can tell which product, size, and color the SKUs reference.

#### 3. **Complete** the Product Name attributes for the SKUs

- a. Add the following values to column C (Product Name) of rows 3-8:
  - i. [RT]Size=Small,[CS]Color=Brown:#7a5315
  - ii. [RT]Size=Small,[CS]Color=Black:#000000
  - iii. [RT]Size=Medium,[CS]Color=Brown:#7a5315
  - iv. [RT]Size=Medium,[CS]Color=Black:#000000
  - v. [RT]Size=Large,[CS]Color=Brown:#7a5315
  - vi. [RT]Size=Large,[CS]Color=Black:#000000





The order of these values in the spreadsheet does not necessarily need to match the order of the values in this screenshot. Instead, ensure the sizes and colors correspond to the SKUs you typed in the previous step.

#### 4. Add rules

- a. In column A (Item Type) for rows 9-11 **type** Rule
- b. Add 2 units of weight when a large size is selected
  - i. In column C (Product Name) on row 9, **type** [RT]Size=Large
  - ii. In column R (Product Weight) on row 9, type [ADD]2
- c. Create a fixed price a particular SKU
  - i. In column E (Product Code/SKU) on row 10, type one of the SKUs created in step 2.b
  - ii. In column K (Price) on row 10, type [FIXED]30.99

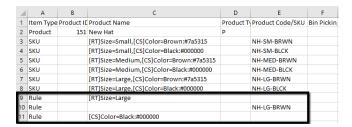


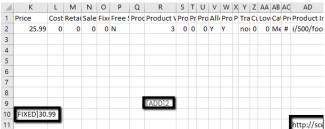
You may use any dollar value you prefer after [FIXED]. This number typed there will be the price for that SKU.

- d. Change the image when the black color is selected
  - i. **Locate** and **copy** a publicly accessible URL for an image file
    - 1. The URL should point directly to the image, not a page that displays the image
    - 2. The URL should end with a file extension like .png or .jpg, or the file extension should be the last portion of the URL before a question mark

/uploads/2014/12/food-hat-2.jpg ?x55630

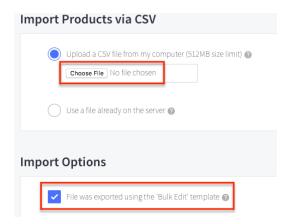
- ii. In column C (Product Name) on row 11, type [CS]Color=Black:#000000
- iii. In column AD (Product Image File 1), paste the URL for the image file





#### 5. **Import** the CSV

- a. Navigate to Products > Import in the store's control panel
- b. **Choose** your file in the *Upload a CSV file from my computer* option
- c. **Check** File was exporting using the 'Bulk Edit' template option
- d. Click the Next button
- e. On the Link Import Fields step, **click** the Next button





Because the file is using the Bulk Edit template and *Bulk Edit Re-Import* was checked, import fields should be automatically linked

- f. Click the Start Import button
- g. **Click** the *View Imported Products* link
- h. **Click** the product's name > the *Options/SKUs* tab > *SKUs* tab
- i. Ensure the SKUs were created
- i. Click the Rules tab
- k. Ensure the Rules were created
- Navigate to the product page on the storefront and ensure the price change and image change rules function as expected

