Cloud Commerce **Pro**
Multi-Channel Order Management

Generic Order Importer

Cloud Commerce Pro's API integrates with a lot of e-commerce platforms and is constantly expanding, however there are some platforms that CCP will not automatically link up to.

You can view our latest API documentation here

This guide will help you to manually import orders into Cloud Commerce Pro from any channel you use that may not have an API or we do not currently integrate with; by using our **Order Importer.**

Prepare your Spreadsheet Data

To use the Order Importer, you will need to be able to extract data from the system you want to import your orders from in a spreadsheet format (CSV or Excel) and this data should contain a minimum of:

- Billing Customer Name
- Billing Email address
- Billing Address (1)
- Billing Town/City
- Billing Postcode
- Order Number
- Product Identifier – this should match your SKU in CCP
- Item Quantity Sold – if not provided, it assumes one item per line

Columns you may need to add to get the Order Importer to work:

- Our SKU – if the channel Product Identifiers do not match those in our system

The names of the columns are not important so you do not have to rename them to be able to use our Order Importer. So long as column names do not change and any mapped columns are in your source file each time you come to import your orders, you can use a previously configured mapping profile and it will remember what is what.

You may however need to manipulate your data source file to include any missing information we require (such as an email address or our SKUs) or to clean up the spreadsheet (any hidden or merged cells or empty data in Excel files can cause problems) before you try to import. If you edit your data file in Excel before using it in the Order Importer, please close it to avoid file reading conflicts between the programs.

An example of an empty spreadsheet you can use as a template if you want to create your own file to put in orders can be **downloaded here**. This template contains all the required fields as well as some that are recommended.
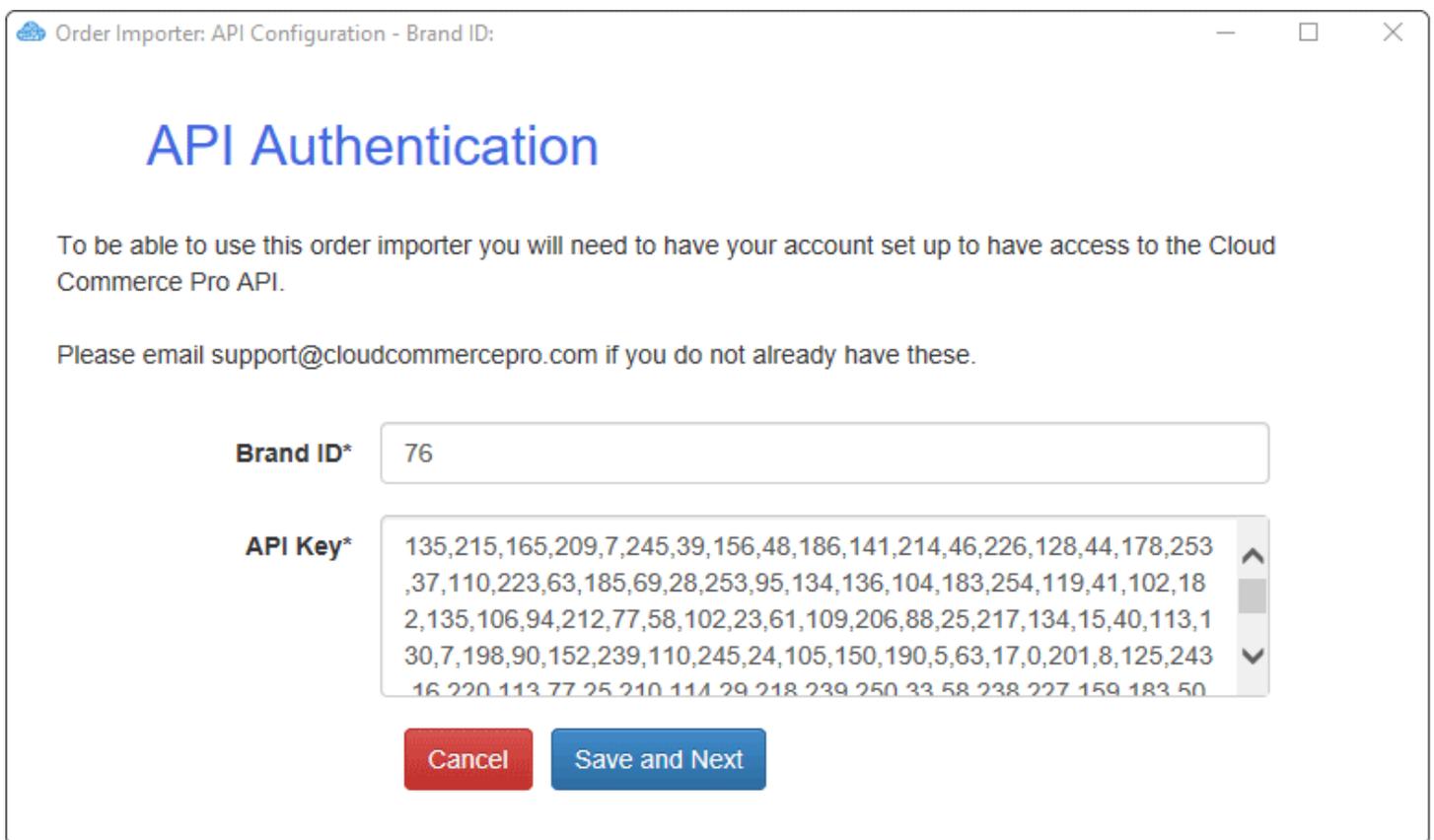
When you are ready to create your first orders, we recommend that you only put a small number through the system so that you can get familiar with the behaviour of the order importer and the effect the settings have on the data you provide.

Request the Order Importer Application

To get a copy of the latest version of the Order Importer application you need to be an existing customer. Please contact Cloud Commerce Pro's Support Team and they will arrange this with you. The Order Importer application can be run from your desktop (Windows only).

First Time Setup

When you first load up the Order Importer, it will ask you for the API details as below – please use the ones provided by our support team so that it is correctly linked to your account.

After inputting the API key, you will be prompted to create a profile. **You will not be able to import any orders until at least one profile is set up**, use the wizard to set up a profile for the spreadsheet format containing data you want to import.
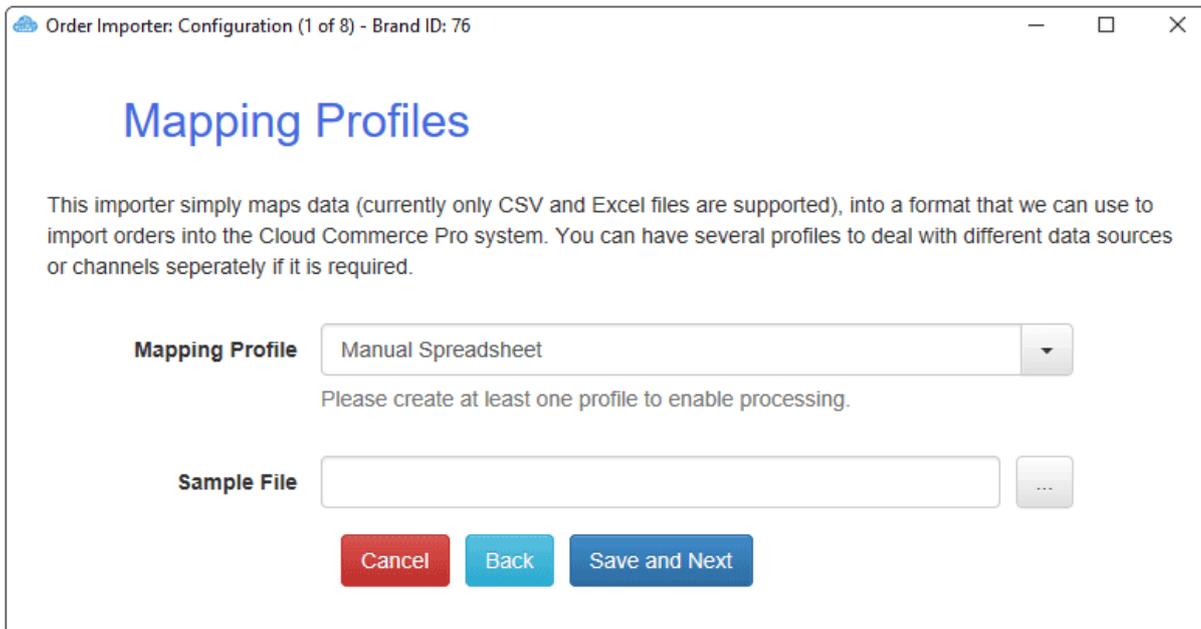
Creating a Profile

Each profile you create will save the settings that allow you to import a known file format much more quickly after initial setup. It is good practice to set up different profiles for each Channel source you wish to import manually (Etsy, Groupon or OnBuy for example) – as these will likely have different file formats and should be loaded onto different sales channels.

You can start the Mapping Profiles wizard manually by selecting the **Edit or Add Mapping Profile** button from the **Configuration Menu**.
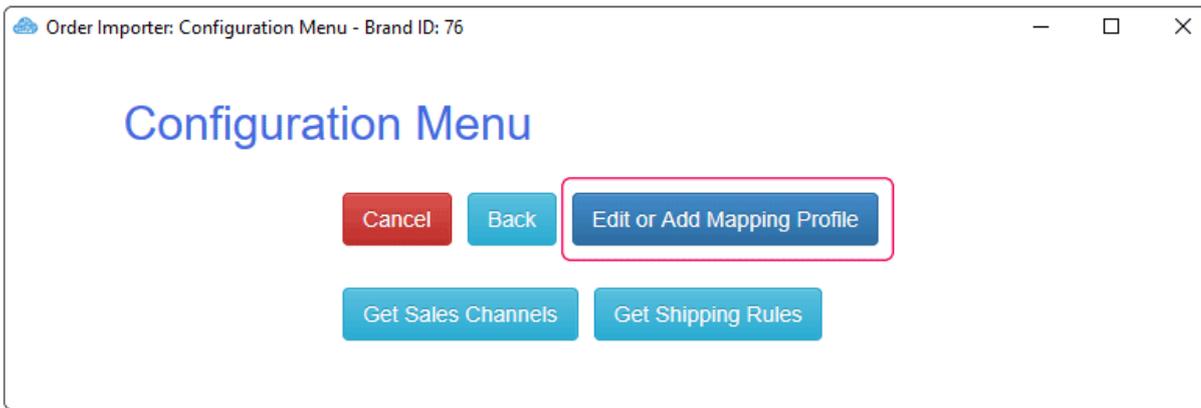
Alternatively, if you have just completed the API key steps, you may be redirected directly to it.

The Profile Wizard

- To create a new Mapping Profile, enter a new name in the Mapping Profiles box
- To edit an existing Mapping Profile, select a profile name from the drop down

Note – these mapping profile names will be used as the default customer generated reference within our system. These generated references are nothing to do with the data you are importing and are only a visual aide to help you identify how the order was processed.

It is recommended that you also select a data file in the format you want to import from when working with mapping profiles, doing so will make your column headers available as drop-down menus against those data values we can read in from a spreadsheet.

Below is an example of a prepared order upload spreadsheet we will demonstrate how to create a profile for (click to enlarge). We want to add these orders as Telephone orders, and to automatically go into the dispatch queue so we can send them out using CCP as soon as possible.

	A	B	C	D	E	F	G	H	I	J	K	L	M
1	Company Name	Trading Name	Customer Name	Email	Address 1	Address 2	Town /City	Postcode	Order ID / PO number	Identifer/ mode number	Item Qty	Item Price	
2	Company Name1	Trading Name1	Customer Name1	testermail1@testthis.com	1 Test Street	Test Street 2	Test Town	AA1 1AA	11AATEST	DGN001-0026			
3	Company Name1	Trading Name1	Customer Name1	testermail1@testthis.com	1 Test Street	Test Street 2	Test Town	AA1 1AA	11AATEST	CKT506-0040			
4	Company Name2		Customer Name2	testermail2@testthis.com	2 Test Street	Test Street 2	Test Town	AA1 1AA	22AATEST	8-095339687-0010			
5		Trading Name3	Customer Name3	testermail3@testthis.com	3 Test Street	Test Street 2	Test Town	AA1 1AA	33AATEST	B00170112730			
6			Customer Name	testermail@testthis.com	10 Test Street	Test Street 2	Test Town	AA1 1AA	00AATEST	CKT506-0105			
7			Customer Name	testermail@testthis.com	10 Test Street	Test Street 2	Test Town	AA1 1AA	00AATEST	DKP109-0281			
8													

Filling out the Wizard

The majority of the wizard relates to mapping; where there is a drop down containing column names from your spreadsheet, then a column value from the given column name your spreadsheet can be used to provide us with that piece of information. Sometimes a dropdown contains special values where this data can also be read directly from the system instead.

As always, required fields are marked with a *, and for these you will need to select the appropriate column name to map the value from that column into the appropriate field in our system.

Profile Wizard: Customer Billing Details

1. Company/Trading Name

These are optional fields, select the column name if available, but if not, don't worry as we will use the customer's name if not provided.

2. First/Last Name

While both first name and last name are required, you can point both of these to the same column in your spreadsheet and it will attempt to split up the name for you.

3. Email

This is a required field and is used to identify the customer in the system. If the customer already exists in the system, even on a different channel, then you can expect the orders to be grouped together under that customer.

4. Customer Type

The order importer can support both Public and Retail trade customers, but can only handle one type at a time. If you want to upload both from the same data source, you should create spreadsheets containing only Public or only Retail customers and create a different mapping profile for each.

5. Payment Terms and Credit Limit

Payment terms, select one of the supported options – if you select Credit terms, you will also need to provide a Credit limit to avoid any issues. The Credit limit in a profile will apply to all customers that are uploaded using that mapping profile.

Profile Wizard: Customer Billing Address

Profile Wizard: Customer Shipping Details/Address

If you are likely to have customers where the billing address is different to the shipping address, you should change the prefilled column names (taken from those populated in the Customer Billing Details/Address details) to their delivery address equivalent.

Profile Wizard: Order Details

1. Order ID

This should be the column that contains the single unique reference that identifies the order in the system you are importing it from and will go into our system as the External Order ID.

When this column changes in your spreadsheet, the order importer will assume it is working on a new order. Please make sure that all items for an order are listed one after the other in any files you import.

2. Reference

If used, the value of this column would go in as the Reference of the order. This will default to the Mapping Profile name if left blank.

3. Sales Channel ID

This can be added as a column, but this would require you to add it to your data beforehand. For this reason, it is recommended that you choose one of your sales channels that are also listed in the dropdown. If the Sales Channel you want is not listed, you can use "Get Sales Channels" from the Configuration Menu to do a refresh before editing the profile so that it has an updated list when you run the wizard.

4. Do Triggers

This is related to creating any thank you for your order type messages or paperwork as it is created, and as you are exporting orders already created, the chances are the channel you are importing them from has already handled all of these welcome type communications anyway. We recommend you just leave this at "False".

5. Mark as Paid

For profiles where you are setting the Payment Type to "Full Payment Before Dispatch" – orders added via the importer will not go into the dispatch queue until they have been paid for.

If the channel is handling your payments for you, marking orders as paid will put them into the dispatch queue ready for you to pick and pack.

6. Use Net Prices

If you are not intending to use product prices from the channel you are importing from, then you will need to specify if the column you are using for prices is gross or net.

Profile Wizard: Product Details

1. Identifier and Identifier Type

The column in your spreadsheet that contains your product SKU (as it is configured in CCP). We currently only support the SKU as an Identifier Type, so if your CCP SKU is not already available on your download you will need to create a column and manually convert the channel SKU to the one we use in CCP.

Note – if we can not match a product on the order, we will not process the entire order.

2. Item Quantity

This is not a required column, but **if a quantity is not provided from the spreadsheet, all lines are assumed to have a quantity of 1.** It is recommended that if you do have a quantity column in your data, you map it here to avoid any unexpected item quantity discrepancies.

3. Item Price

If you are importing manual or telephone orders, then we recommend that you use the Channel Price option as this is the price that would be charged if you were to input the orders manually.

However, if you are importing your orders from a 3rd party channel, then we recommend that you use the prices that the channel has actually charged your customers to maintain accounting integrity. **Thus in these cases, we highly recommend that you use the equivalent price column that has been provided by your 3rd party channel.**

Profile Wizard: Order Shipping

1. Shipping Rule ID

If you are wanting to automatically dispatch the orders you want to import on this profile, you will probably need to choose from one of the Shipping Rules in the dropdown for it successfully run this step. As with Sales Channels, you can "Get Shipping Rules" from the Configuration Menu if a rule you were looking for was not available in this dropdown.

2. Shipping Net, VAT and Total

Unless all your orders on a channel have free shipping, you will probably want to set these if they are available to you.

3. Mark as Dispatched

Sometimes you might not need to actually ship the orders you are importing through CCP as they may have already been dispatched, but you are wanting to import them purely for stock and or accounting purposes. If this is the case you can use Mark As Dispatched "True" to clear them from the dispatched queue and add a tracking reference to the order if one is provided.

Note – All orders going through the importer will have the date the order was imported and not the original date on them. So if you are adding orders on retrospectively there is currently no way to set the dates as they go in.

4. Tracking ID

This is the courier tracking reference if the order has already been dispatched and you want to add it to the order.

The wizard is now complete.

Processing Orders

After you have set up your profile(s) and are ready to use them for the first time, **we strongly recommend that you only put a small number through the system** so that you can check the behaviour of a profile and the effect the settings have on the data you are running it with.

Next is to process the orders, click on **Process Orders** from the main menu.
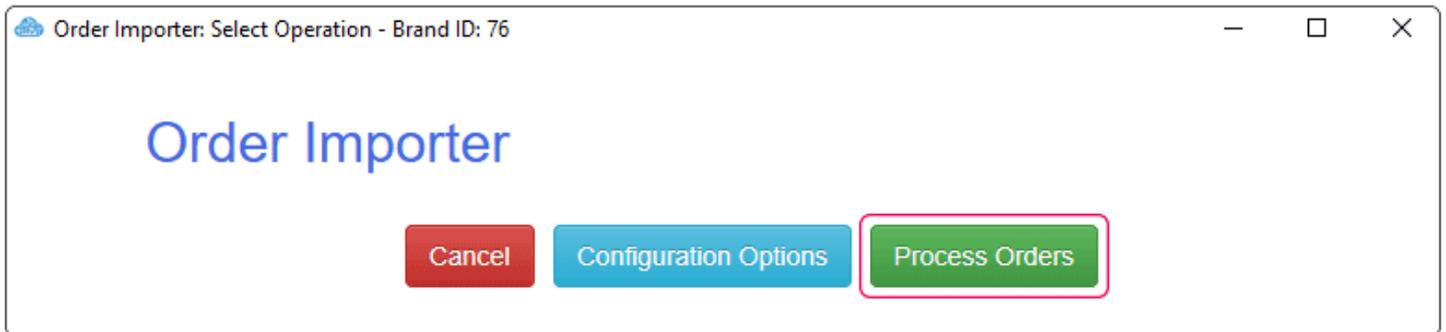
Upload the file again in the Order File section and then click **Process Orders** and Continue.
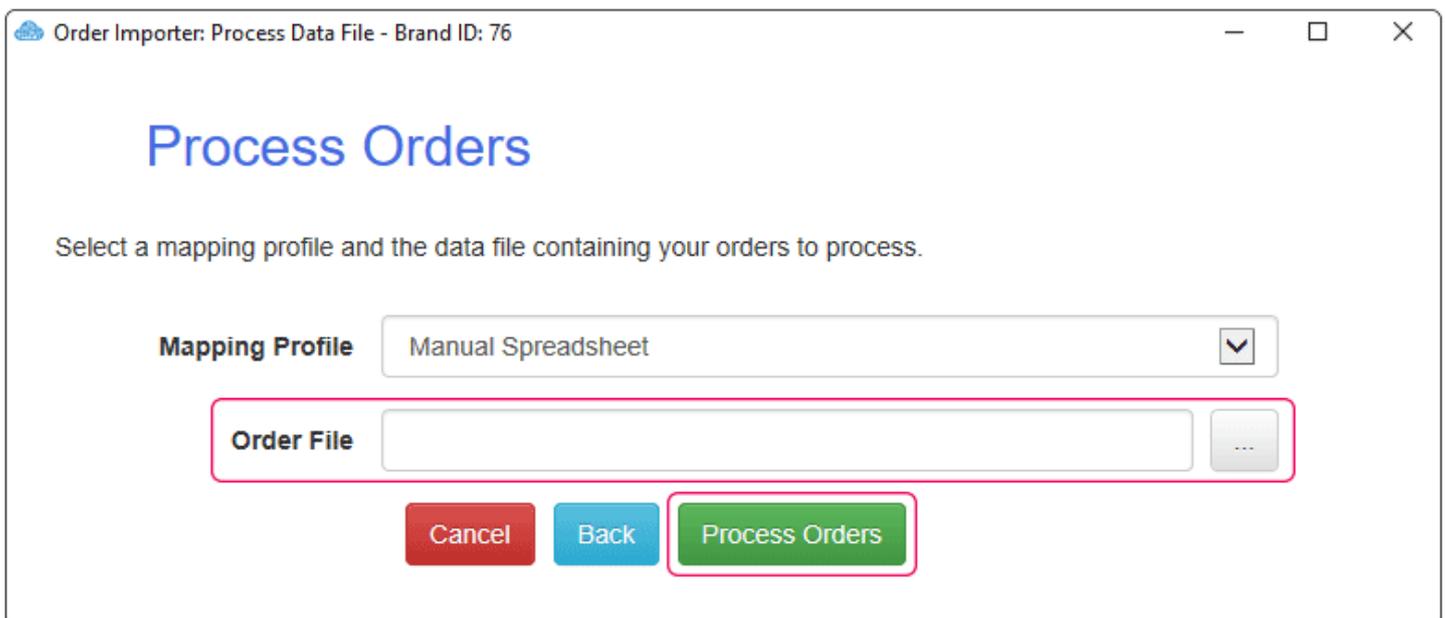
Once the orders have been processed, they will display in your Cloud Commerce System as below, notice how the different name combinations from the example are put into the system.

Finally, if you set Mark as Paid is true or Customer Type to Retailer in the mapping profile, then you can also expect to see orders that were sucessful go into your dispatch queue.