TrueCommerce Nexternal

Do Business in Every Direction

Nexternal
New Order Import Guide

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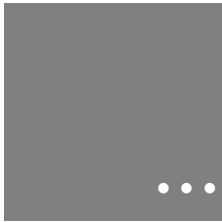
Table of Contents

Nexternal
New Order Import Guide

Overview

The New Order Import option allows you to use an Excel file to import new orders into your Nexternal Order Management System (OMS). You may import multiple orders at once, and these may include any combination of the following: 1) Orders with a Single Ship-To Address per Order, 2) Orders with Multiple Ship-To Addresses per Order, 3) Pickup Orders. You may include up to 10 line items per Ship-To Address or Pickup Location. For examples of a populated New Order Import file, see Appendix B.

Multiple Ship-To and Multiple Pickup orders may be placed by combining multiple rows in the import file into a single order in accordance with the instructions below for multiple ship-to addresses.

How to Import New Orders with a Single Ship-To Address per Order

1. For each customer for whom you wish to create an order, ensure that there is an *active* customer record in the OMS. You may create a customer record directly through the OMS (Customers / New), or by using the Customer Import (Customers / Import / Import Customers).

2. If Credit Card will be used for payment on any orders in your import, ensure that the Credit Card is saved to the purchasing Customer's file before you begin the New Order Import.

3. Navigate to Orders / Import / New Order Import. Click **Next** and right click on the file under Step 1 to download and save it to your computer.

4. Open the file and begin populating the fields. Use the descriptions in Appendix A to guide your entries. You may alter the width of the columns in your spreadsheet, but do not format the cells, or add or remove any columns. (If you paste data into the cells, be sure to paste values only, or you will reformat the cells and the spreadsheet will not import.) Each row in the file will represent a single order. For examples of a populated New Order Import file, see Appendix B.

5. When you are finished populating the file, navigate to Orders / Import / New Order Import. Click Next and scroll down to the bottom of the page. Under Step 3 Upload, click Choose File and select your populated file. Click Import. If there are any problems with your file, you will see an error message indicating the problem. If the error says the file is structurally altered, see this Article. If there are no issues, you will see a success message indicating the number of orders that were uploaded successfully.

How to Import New Orders with Multiple Ship-To Addresses per Order

1. For each customer for whom you wish to create an order, ensure that there is an *active* Customer Record in the OMS. You may create a Customer Record directly through the OMS (Customers / New), or do so using the Customer Import (Customers / Import / Import Customers).

   > NOTE
   >
   > ***Note that you should NOT create a Customer Record for each Ship-to address/order recipient on a Multiple Ship-To order***. *Instead, create a Customer Record only for the customer who is placing the order. The Address of each shipment in an order with multiple Ship-To Addresses will be added during the New Order Import.*

2. If Credit Card will be used for payment on any orders in your import, ensure that the Credit Card is saved to the purchasing Customer's file before you begin the New Order Import.

3. Navigate to Orders / Import / New Order Import. Click Next and right click on the file under Step 1 to download and save it to your computer.

4. Open the file and begin populating the fields. Use the descriptions in Appendix A to guide your entries. You may alter the width of the columns in your spreadsheet, but do not format the cells, or add or remove any columns. (If you paste data into the cells, be sure to paste values only, or you will reformat the cells and the spreadsheet will not import).

   Each row in the file will represent a shipment that is being sent to a particular address. An order will be created as a Multiple Ship-To order by combining rows into a single order when the following conditions are met:

   a. The rows to be combined are consecutive;
   b. The order-level fields (e.g. Customer, Bill-To Address, Payment Method, etc.) are consistent; and
   c. Each Ship-To must have a unique Address Label.

   > NOTE
   >
   > ***EFFICIENCY TIP:*** *If a single Order has the exact same contents for all the Ship-To addresses contained in the order (e.g., a company is sending the same holiday gift to 25 Addresses), create the order for one address on the first row. Then copy that row down for as many Ship-To addresses as needed. Edit only the Ship-To address columns (Column R-AD). Be SURE to include a unique Address Label for each Ship-To address vs other Ship-To addresses in this file for this customer.*

5. When you are finished populating the file, navigate to Orders / Import / New Order Import. Click Next and scroll down to the bottom of the page. Under Step 3 Upload, click Choose File and select your populated file. Click Import. If there are any problems with your file, you will see an error message indicating the problem. If the error says the file is structurally altered, see this Article. If there are no issues, you will see a success message indicating the number of orders that were uploaded successfully.

About Multiple Ship-To Orders

The screenshot below shows a single order with two Ship-To addresses. Each recipient is receiving the same bottle of wine. The Customer is circled in Green. This order is tied to Matthew Doe. It will appear in his order history and all segments of the order will be eligible for permissions and pricing related to his customer type.

This order is being sent to two addresses, indicated in Red and Blue below. These recipients are not customers, but Ship-To addresses for customer Matthew Doe.

How to Import Orders for Pickup

1. For each customer for whom you wish to create an order, ensure that there is an *active* customer record in the OMS. You may create a customer record directly through the OMS (Customers / New) or do so using the Customer Import (Customers / Import / Import Customers).

2. If Credit Card will be used for payment on any orders in your import, ensure that the Credit Card is saved to the purchasing Customer's file before you begin the New Order Import.

3. Navigate to Orders / Import / New Order Import. Click Next and right click on the file under Step 1 to download and save it to your computer.

4. Open the file and begin populating the fields. Use the descriptions in Appendix A, Import Orders for Pickup Column Names and Descriptions to guide your entries in your Nexternal OMS.

5. When you are finished populating the file, navigate to Orders / Import / New Order Import. Click Next and scroll down to the bottom of the page. Under Step 3 Upload, click Choose File and select your populated file. Click Import. If there are any problems with your file, you will see an error message indicating the problem. If the error says the file is structurally altered, see this Article. If there are no issues, you will see a success message indicating the number of orders that were uploaded successfully.

Appendix A

Column	Column Name	Description
A-D	**CUSTOMER_NO, LAST_NAME, FIRST_NAME, EMAIL**	• You may specify a Customer Number, Last Name <u>and</u> First Name, E-Mail Address, or any combination of the three; the field(s) that you specify are used to find a match to an existing customer • A successful match to an existing customer is required
E	**USE_MASTER**	• Valid values are Yes and No • Applicable only to those using Purchasing Groups feature • A value of Yes indicates that, if the customer has a Master Customer (i.e. is a Subcustomer), the Master Customer should be used for the order, and approval should be required when appropriate • Optional (default value: Yes)
F	**BILL_LAST_NAME**	• Last Name on the customer's Billing Address • Maximum of 50 characters • Required
G	**BILL_FIRST_NAME**	• First Name on the customer's Billing Address • Maximum of 50 characters • Required
H	**BILL_PHONE_NUM**	• Phone Number of the customer's Billing Address • Maximum of 30 characters • Required
I	**BILL_PHONE_EXT**	• Extension of the customer's Billing Address Phone Number • Maximum of 30 characters • Optional
J	**BILL_COMPANY_NAME**	• Company Name of the customer's Billing Address • Maximum of 100 characters • May be required, optional, or not used, depending on your OMS Setting under Customers / Types / Company Field. Follow your setting for the Customer Type of the customer on the order.
K	**BILL_ADDRESS1**	• Street Address Line 1 of the customer's Billing Address • Maximum of 100 characters • Required
L	**BILL_ADDRESS2**	• Street Address Line 2 of the customer's Billing Address • Maximum of 100 characters • Optional
M	**BILL_CITY**	• City of the customer's Billing Address • Maximum of 50 characters • Required
N	**BILL_STATE**	• State / Province of the customer's Billing Address • Must be a recognized 2 letter state or province abbreviation (refer to http://www.nexternal.com/documentation/statescountries.htm for a complete list), or blank (if no state or province) • Optional (default value: none), but integrity must be maintained between BILL_STATE and BILL_COUNTRY

Column	Column Name	Description
O	BILL_POSTAL_CODE	• Zip/Postal Code of the customer's Billing Address • Maximum of 20 characters • Required
P	BILL_COUNTRY	• Country of the customer's Billing Address • Must be a recognized 2 letter country code (refer to http://www.nexternal.com/documentation/statescountries.htm for a complete list) • Optional (default value: US), but integrity must be maintained between BILL_STATE and BILL_COUNTRY
Q	BILL_ADDRESS_TYPE	• Address Type (Business or Residential) of the customer's Billing Address • Optional (default value: Residential)
R	SHIP_ADDRESS_LABEL	• Unique label for the order recipient's Shipping Address. This will be stored in the customer's account, but not visible to the order recipient. • Maximum of 25 characters • Applicable only to Ship-To Orders • Optional, but every Ship-To in a Multiple Ship-To Order must have a unique Address Label
S	SHIP_LAST_NAME	• Last Name on the order recipient's Shipping Address • Maximum of 50 characters • Applicable only to, and required for, Ship-To Orders
T	SHIP_FIRST_NAME	• First Name on the order recipient's Shipping Address • Maximum of 50 characters • Applicable only to, and required for, Ship-To Orders
U	SHIP_PHONE_NUM	• Phone Number of the order recipient's Shipping Address • Maximum of 30 characters • Applicable only to, and required for, Ship-To Orders
V	SHIP_PHONE_EXT	• Phone Extension of the order recipient's Shipping Address • Maximum of 30 characters • Applicable only to Ship-To Orders • Optional
W	SHIP_COMPANY_NAME	• Company Name of the order recipient's Shipping Address • Maximum of 100 characters • Applicable only to Ship-To Orders • May be required, optional, or not used, depending on your OMS Setting under Customers / Types / Company Field. Follow your setting for the Customer Type of the customer on the order.
X	SHIP_ADDRESS1	• Street Address Line 1 of the order recipient's Shipping Address • Maximum of 100 characters • Applicable only to, and required for, Ship-To Orders
Y	SHIP_ADDRESS2	• Street Address Line 2 of the order recipient's Shipping Address • Maximum of 100 characters • Applicable only to Ship-To Orders • Optional

Column	Column Name	Description
Z	SHIP_CITY	• City of the order recipient's Shipping Address • Maximum of 50 characters • Applicable only to, and required for, Ship-To Order
AA	SHIP_STATE	• State / Province of the order recipient's Shipping Address • Must be a recognized 2 letter state or province abbreviation (refer to http://www.nexternal.com/documentation/statescountries.htm for a complete list), or blank (if no state or province) • Applicable only to Ship-To Orders • Optional (default value: none), but integrity must be maintained between SHIP_STATE and SHIP_COUNTRY
AB	SHIP_POSTAL_CODE	• Zip / Postal Code of the order recipient's Shipping Address • Maximum of 20 characters • Applicable only to, and required for, Ship-To Orders
AC	SHIP_COUNTRY	• Country of the order recipient's Shipping Address • Must be a recognized 2 letter country code (refer to http://www.nexternal.com/documentation/statescountries.htm for a complete list) • Applicable only to Ship-To Orders • Optional (default value: US), but integrity must be maintained between SHIP_STATE and SHIP_COUNTRY
AD	SHIP_ADDRESS_TYPE	• Address Type (Business or Residential) of the order recipient's Shipping Address • Optional (default value: Residential)
AE	SHIP_METHOD	• Shipping Method • Maximum of 60 characters • Applicable only to Ship-To Orders • Optional (defaults to first-ordered Shipping Method configured at Settings / Shipping)
AF	SHIP_PRICE	• Shipping Price to be charged to the Customer • Positive numeric values and zero, only • Applicable only to Ship-To Orders • Optional (defaults to calculated value as configured at Settings / Shipping)
AG	PREFERRED_DELIVERY_DATE	• Preferred Date for the order to be delivered to the Recipient • Valid date values (mm/dd/yyyy format) only • Applicable only to Ship-To Orders • The following conditions must be met: (a) the date entered is a valid delivery date for the corresponding shipper; (b) time in transit information is available for the shipment; and (c) the corresponding Expected Ship Date is a valid shipping day for your store (per Settings / Site Options / Expected Fulfillment). • Optional
AH	PICKUP_LOCATION	• Leave blank for Ship-To Orders
AI	EXPECTED_PICKUP_DATE	• Leave blank or Ship-To Orders

Column	Column Name	Description
AJ-CN	**Interspersed Columns: PRODUCT_NO1, PRODUCT_NAME1, and SKU1 - PRODUCT_ NO10, PRODUCT_NAME 10, and SKU10**	• You may specify a Product Number, Product Name, SKU (at either the Product or SKU level), or any combination of the three for each line item for up to 10 different line items. The field(s) that you specify are used to find a match to an existing product • A successful match to an existing product is required
AM-CO	**Interspersed Columns: QUANTITY1 – QUANTITY10**	• Quantity for Line Items #1 - #10 • Positive integer values only • Required if a corresponding PRODUCT_NO, PRODUCT_NAME, and/or SKU is specified
AN-CP	**Interspersed Columns: ATTRIBUTES1 – ATTRIBUTES10**	• Attribute and Write-In Attribute Values for Line Items #1 - #10 • Express Attributes and Write-In Attributes with the Name=Value format, using the pipe character (|) to separate multiple Attributes (e.g. Size=Extra Large|Color=Green) • A successful match for each Attribute and required Write-In Attribute for the corresponding product is required; however, if Attributes can be determined by the SKU specified in the corresponding SKU field, they may be omitted from this field
AO-CQ	**Interspersed Columns: PRICE1 – PRICE10**	• Price for Line Items #1 - #10 • Positive numeric values and zero, only • Optional (defaults to calculated value as configured for the product)
CR	**SALES_TAX_RATE**	• Sales Tax Rate to be applied to the order. • Express as a percent between 0 and 100 • Optional (defaults to calculated value as configured at Settings/Sales Tax)
CS	**PAYMENT_METHOD**	• Payment Method to be used for the order • Maximum of 20 characters. Any value is valid. You are not limited to the methods configured at Settings / Billing Options. • If using the Credit Card billing option in Settings / Billing Options, the customer must have at least one valid Credit Card saved to their account which will be used for the order. By default, the Preferred Credit Card will be used. If no Preferred Credit Card is indicated, a Saved Credit Card will be used. Note that the credit card will be authorized prior to order placement based on the Authorize Credit Cards setting in Settings / Compatible Software / Payment Gateways / Preferences. If the box is not checked, the order will be created with Unbilled status. • Optional (defaults to no payment)
CT	**PO_NUMBER**	• Purchase Order Number • Maximum of 100 characters • Applicable only to Ship-To Orders • May be required, optional, or not used, as configured at Settings / Billing Options
CU	**COMMENTS_FOR_APPR OVERS**	• Unlimited characters • Applicable only to customers who are using Purchasing Groups, for orders requiring approval

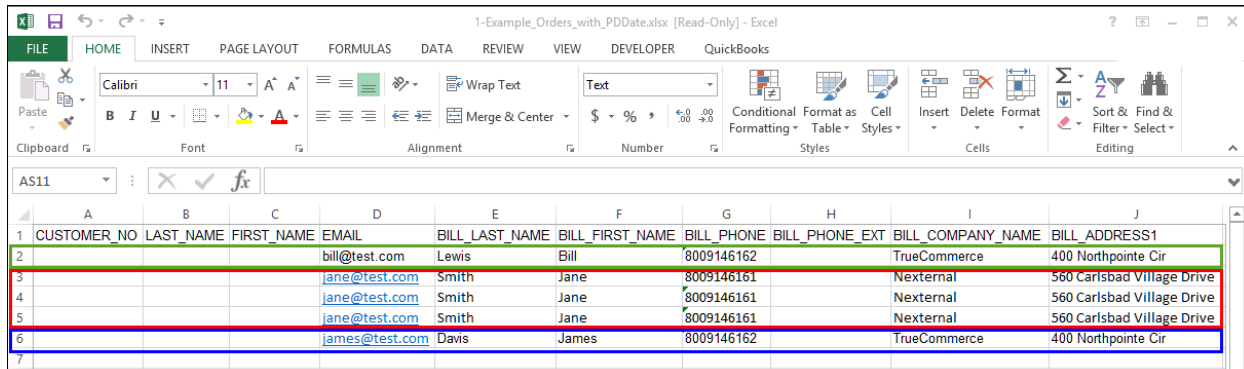| Column	Column Name	Description
CV	COUPON_CODE	• Coupon Code • Must match a preexisting Coupon Code • Optional
CW	TAGS	• You may specify a list of Tags by delimiting with commas – Tag1,Tag2...(e.g. Club Order,July) • Optional
CX	CURRENCY_CODE	• Currency Code • Must match a 3-letter Currency Code configured for use at Settings/Compatible Software/Currency Conversion • Optional (default value: USD) • Controls the currency used for the order and displayed to the customer; however, other prices included in the import (e.g. SHIP_PRICE, PRICE1, PRICE2, etc.) are always read as USD values, regardless of the value of this field, and converted to the specified currency via the applicable exchange rate
CY	GIFT_CARD	• Gift Message • Valid values are Yes and No. This option is available depending on your setting in Settings / Site Options / Free Gift Message. • Applicable only to Ship-To Orders • Optional (default value: No)
CZ	GIFT_CARD_TEXT	• Gift Message Text • Unlimited characters • Applicable only to Ship-To Orders • Required if GIFT_CARD is Yes
DA	GIFT_WRAP	• Valid values are Yes and No. This option is available depending on your setting in Settings / Site Options / Free Gift Wrap. • Applicable only to Ship-To Orders • Optional (default value: No)
DB	CUSTOMER_COMMENTS	• Customer Comments • Unlimited Characters • Optional
DC	COMPANY_COMMENTS	• Company Comments • Unlimited Characters • Optional
DD	DISPLAY_COMMENTS	• Display Company Comments to Customer • Valid values are Yes and No • Optional
DE	ORDER_CONFIRMATION_EMAIL	• Send Order Confirmation E-Mail to Customer • Valid values are Yes and No • Optional (default value: Yes)
DF	PLACED_BY	• Method Placed • Valid values are Phone, Fax, Mail, or a custom value • Maximum of 25 characters • Required

Appendix B
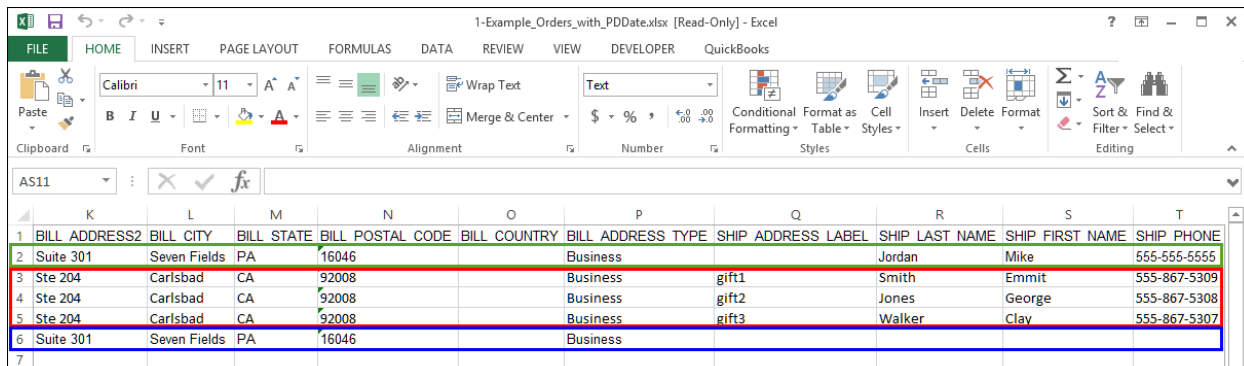
The following screenshots show an example populated New Order Import file containing three types of orders:

1. Orders with a Single Ship-To Address Per Order **(Row 2)**.

2. Orders with Multiple Ship-To Addresses Per Order (About multiple Ship-To) **(Rows 3-5)**.
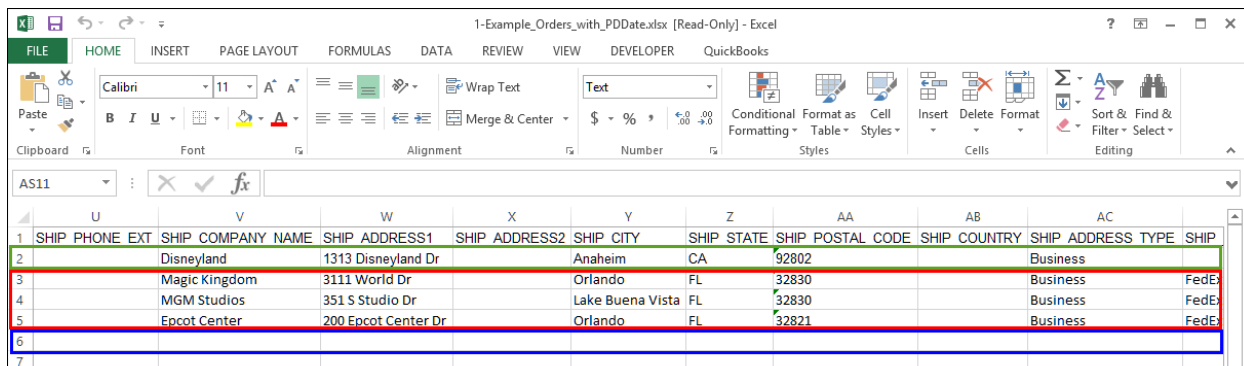
3. Pickup Orders **(Row 6)**.

The orders may include up to 10 unique line items (unlimited quantity per item) and must be assigned to existing customers. Gift Certificate orders are not supported.

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