

11-0015-EN-How do I Export my Orders into a CSV file?

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Sales Manager allows you to export your orders into a CSV format which you can then use to import into your accounting Package.

1. Open Up Sales Manager
2. If you are not already in the Export view, click the Export image in the bar on the left hand side.
3. Now Click on Advanced Search, All the orders in the Search view are the ones that are exported. So for example in my view below I have two orders 10135 & 10155, these are the two orders that will be exported.

Change the search criteria accordingly to obtain all the orders you want to export. You can only export them by Shop. If you have multiple shops you will have to export orders for each shop separately

4. Then click on the Export from the menu and Choose Export to CSV

5. The export process will export two files

Customer Details - saved as Customer_yyyymmdd.csv (where yyyymmdd is the year, month, day the file was exported)

The following data is included in the export:-

ID,NAME,COMPANY,ADDRESS,CITY,STATE,POSTCODE,COUNTRY,SADDRESS,SCITY,SSTATE,SPOSTCODE,SCOUNTRY,PHONE1,PHONE2,FAX,EMAIL

Invoices for the Shop Selected - saved as invoice_yyyymmdd.csv - (where yyyymmdd is the year, month, day the file was exported)

The following data is included in the export

TYPE,DATE,TRANSACTION NUMBER,ID,AMOUNT,QTY,TAX,TAXRATE,COMMENT

6. Now you can use these *.csv files to import into your Accounting Software