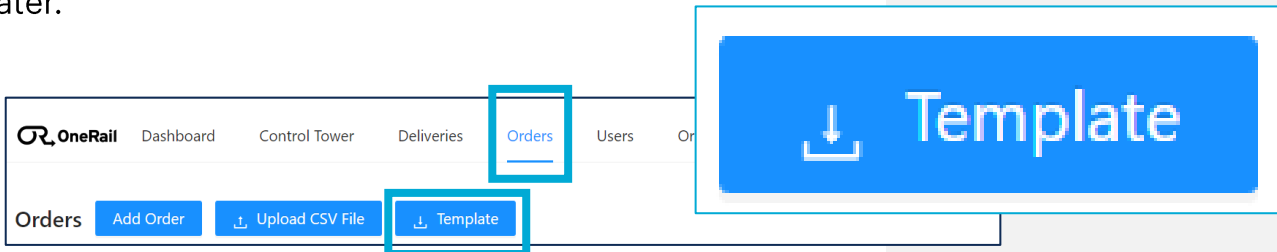


# Order Entry

## Creating an Order Using a CSV File

Creating an order using a CSV File will allow for bulk orders to be entered. This involves downloading a CSV file from your company's POS or WMS and uploading it into the OneRail platform. This is generally completed at the end of day for future deliveries--next day or later.



Using your company's point of sale, inventory or warehouse management system:

1. Export the delivery order to a CSV file according to your company's processes and procedures.
  - The order must be in the correct CSV Template.
  - The correct CSV Template is found on the Orders page. This template will have been discussed and formatted at initial implementation.

### Template example

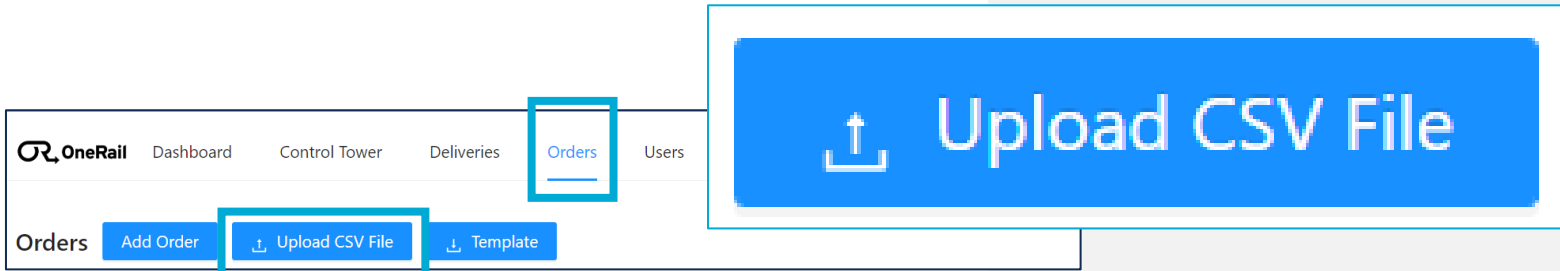
A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	AA	AB	AC
1	from.id	from.name	from.addr	from.addr	from.addr	from.addr	from.addr	from.lat	from.long	from.stor	from.instr	from.conf	from.phot	from.conf	from.wing	from.wing	from.appc	from.appc	to.id	to.name	to.address	to.address	to.address	to.address	to.address	to.latitudi	to.longitu	
2		From Name	123 From Addr1		From City	FL		32819			101									Customer	Customer	address 1	Customer	FL		32819		
3																												
4																												
5																												
6																												
7																												
8																												
9																												

### Exported CSV example

A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	AA	AB	AC
1	from.stor	to.address	to.address	to.address	to.address	to.address	deliveryT	deliveryO	notes	isreturn	capability	accessori	shipperC	deliveryS	state	services	shipment	order.ord	order.net	shipperEx	order.bar	order.stat	ordertem	ordertem	ordertem	ordertem	ordertem	ordertem
2	1318	141	Howey Rd	Groveland	FL		34736								READY_TC	CALF-A	Same Day	Cardinal35-411		1.42E+08	SHIPPING	2x4 6' Pre	1.42E+08	1	8	4	15	52
3															READY_TC	CALF-A	Same Day	Cardinal35-511		1.02E+08	SHIPPING	Dewalt 20	1.02E+08	1	10	9	5	1
4	1318	141	Howey Rd	Groveland	FL		34736								READY_TC	CALF-A	Same Day	Cardinal35-611		1.12E+08	SHIPPING	Kobalt 4-T	1.12E+08	1	3	3	11	1
5	1318	141	Howey Rd	Groveland	FL		34736								READY_TC	CALF-A	Same Day	Cardinal35-111		1.34E+08	SHIPPING	2x4 6' Pre	1.34E+08	1	9	2	1	1
6	1318	141	Howey Rd	Groveland	FL		34736								DRAFT	CALF-A	Same Day	Cardinal35-1		1.42E+08	SHIPPING	2x4 6' Pre	1.42E+08	1	8	4	15	52
7	1318	141	Howey Rd	Groveland	FL		34736								DRAFT	CALF-A	Same Day	Cardinal35-2		1.02E+08	SHIPPING	Dewalt 20	1.02E+08	1	10	9	5	1
8	1318	141	Howey Rd	Groveland	FL		34736								DRAFT	CALF-A	Same Day	Cardinal35-3		1.12E+08	SHIPPING	Kobalt 4-T	1.12E+08	1	3	3	11	1
9	1318	141	Howey Rd	Groveland	FL		34736								DRAFT	CALF-A	Same Day	Cardinal35-3		1.34E+08	SHIPPING	2x4 6' Pre	1.34E+08	1	9	2	1	1
10	1318	141	Howey Rd	Groveland	FL		34736								DRAFT	CALF-A	Same Day	Cardinal35-4		1.34E+08	SHIPPING	2x4 6' Pre	1.34E+08	1	9	2	1	1
11	1318	141	Howey Rd	Groveland	FL		34736								DRAFT	CALF-A	Same Day	Cardinal35-4		1.34E+08	SHIPPING	2x4 6' Pre	1.34E+08	1	9	2	1	1
12	1318	141	Howey Rd	Groveland	FL		34736								DRAFT	CALF-A	Same Day	Cardinal35-5		1.34E+08	SHIPPING	Dewalt 20	1.34E+08	1	8	2	1	1
13	1318	141	Howey Rd	Groveland	FL		34736								DRAFT	CALF-A	Same Day	Cardinal35-5		1.34E+08	SHIPPING	Dewalt 20	1.34E+08	1	8	2	1	1
14	1318	141	Howey Rd	Groveland	FL		34736								DRAFT	CALF-A	Same Day	Cardinal35-6		1.33E+08	SHIPPING	Kobalt 4-T	1.33E+08	1	10	7	8	37
15	1318	1050	E W Hwy 50	Clermont	FL		34711								DRAFT	CALF-A	Same Day	Cardinal35-6		2.44E+08	SHIPPING	2x4 6' Pre	2.44E+08	1	3	3	6	1
16	1318	1050	E W Hwy 50	Clermont	FL		34711								DRAFT	CALF-A	Same Day	Cardinal35-7		2.42E+08	SHIPPING	Dewalt 20	2.42E+08	1	7	4	5	15
17	1318	1050	E W Hwy 50	Clermont	FL		34711								DRAFT	CALF-A	Same Day	Cardinal35-8		2.42E+08	SHIPPING	Dewalt 20	2.42E+08	1	7	4	5	15
18	1318	1050	E W Hwy 50	Clermont	FL		34711								DRAFT	CALF-A	Same Day	Cardinal35-8		2.42E+08	SHIPPING	Dewalt 20	2.42E+08	1	7	4	5	15
19	1318	1050	E W Hwy 50	Clermont	FL		34711								DRAFT	CALF-A	Same Day	Cardinal35-9			SHIPPING							
20	1318	13515	Mascotte Emp	Groveland	FL		34736								DRAFT	CALF-A	Same Day	Cardinal35-9			SHIPPING							

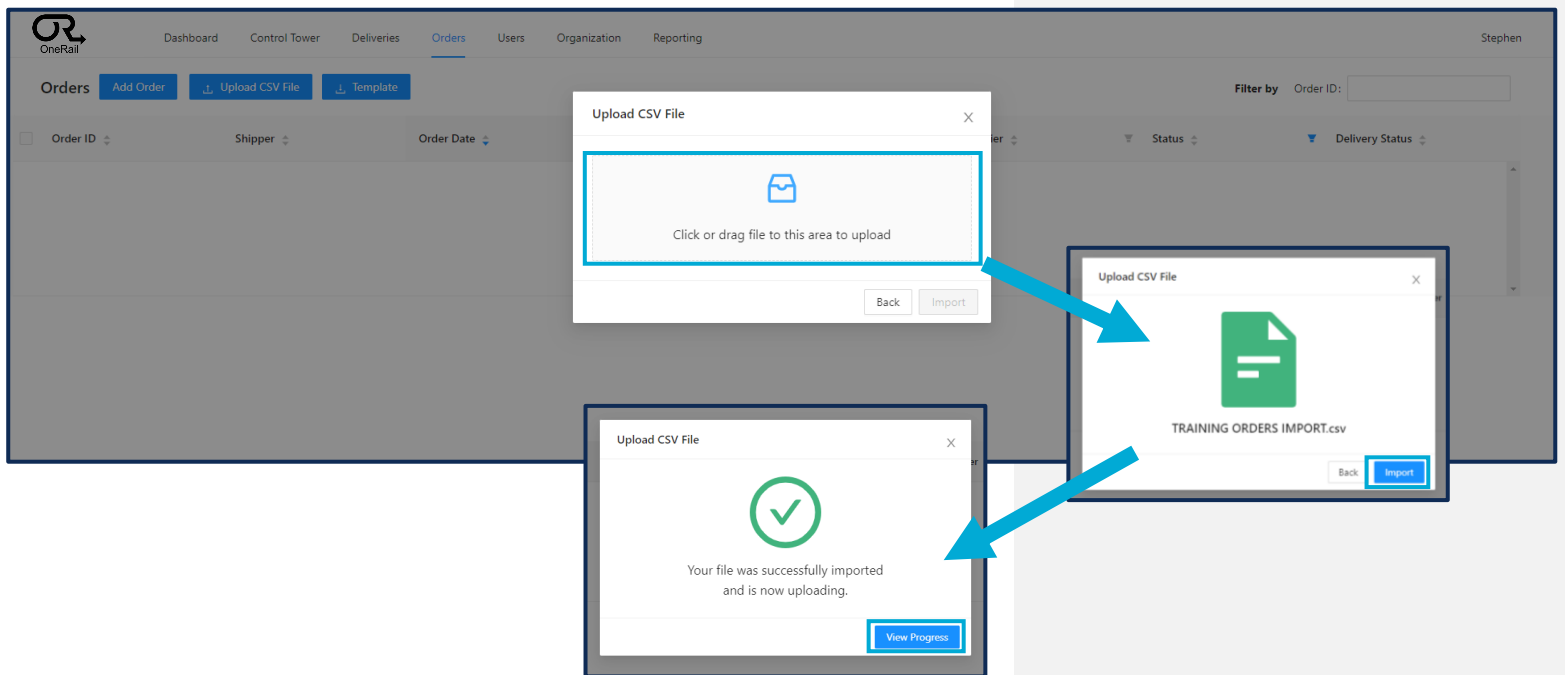
# Order Entry

Creating Using a CSV File Continued...



From the Orders tab,

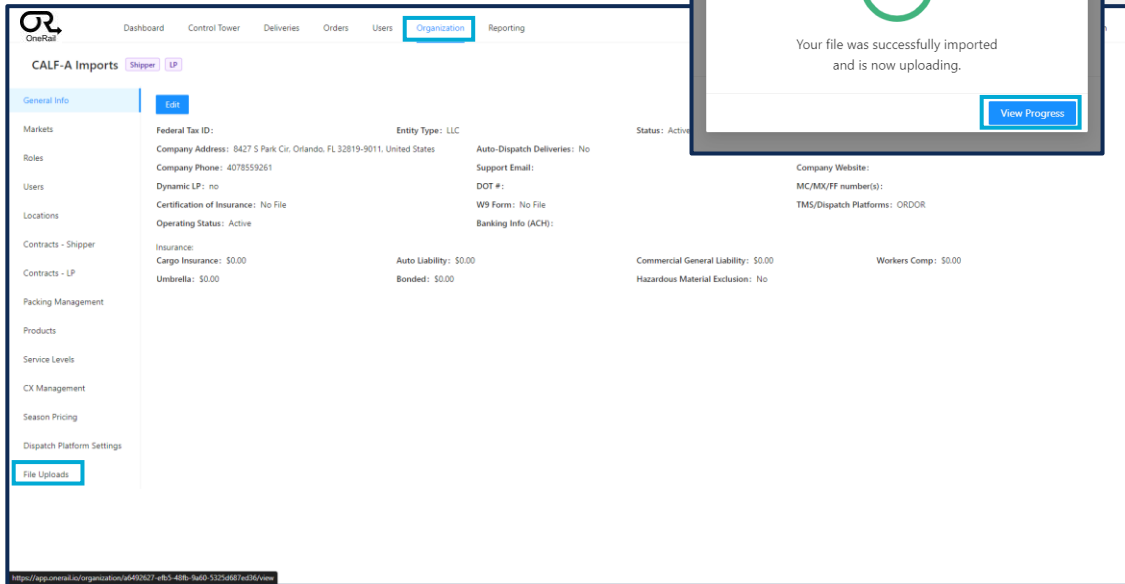
1. Select Upload CSV File.



2. Click or drag file to this area to upload.
  - Either drag the orders file into the area, or
  - Select the orders file from your computer.
3. Select **Import**.
4. Select **View Progress** for upload progress and errors.

# Order Entry

## Viewing CSV Progress & Errors



After the “Upload is successfully completed” pop-up page:

1. Select **View Progress** after successful upload.

From the **Organization** page:

1. Select **File Uploads**.
2. View orders that uploaded successfully or failed. Failed uploads can be due to incorrect address, invalid order number or incorrect information in the template.
3. Select **i** next to Failed or Partial for more information why it partially or completely failed.
4. Check your store’s point of sale or warehouse management system for each Failed order’s errors.
5. Correct and export/upload the entire CSV file again or enter the order manually. A second upload will error duplicates and successfully import corrected orders.

