Product Import Documentation

This document can be used to determine what information should go in which column of your Product Upload Template .CSV file, so you can have a successful product upload. You can download a template for your CSV file with all of the correct headers already in it on the same page where you downloaded this documentation.

HOW TO UPLOAD PRODUCTS
- **Upload a CSV file to the upload tool with the appropriate (required) headers, as detailed in the table below.** The table describes restrictions on the information provided for upload.
- If you enter an invalid file (the wrong file type, incorrectly formatted, missing any required headers…) you will not be able to upload any products and will see an error.

- Each unique product is identified by:
  - Product Name
  - Category Name
  - Organization Name
  - Market Subdomain
- Each unique product-unit combination is identified by the above, plus:
  - Unit name
- If you upload a product with the same name, category, organization, market, and unit name, all other information will overwrite existing data.
- Any difference in the unique identifiers above will create a new product.
- You may upload 2 units for a product per row in a spreadsheet. For additional units, you must add an a new row and include all required information again (the same product name, organization, category, market subdomain) in the new row.

- You *must* include all of the required headers in the table below.
  - Fields marked as optional must exist as headers but can be left empty.
  - You may also include your own headers/data columns in the upload. This data will not be stored in the Local Orbit system, but it will not affect the upload process.
  - The order of the required headers does not matter. We suggest that all of the headers pertaining to multi-unit/break case pricing appear at the furthest right of the CSV (the same way the template product upload CSV file is formatted).
- You must upload CSV. An .xls, .xlsx file, or any other formats currently cannot be processed by our upload system.
  - Additional format handling is in our future development queue.

- Inventory is *not* currently handled in the product upload. After uploading your products, make sure to edit your inventory appropriately in your products dashboard!
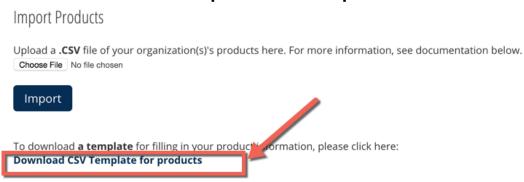
Detail: Errors and Feedback in the Product Upload Process
- If the file you choose for upload is in an invalid format – for instance, if it is not a .CSV file, or if it is missing any required headers – none of the upload will be processed, and you will see an error message, with an option to return to the original upload screen.
- If the sheet is in proper format, it is processed row by row.
  - You will see any errors by row on the results screen when the upload has completed processing.
  - The number of products successfully uploaded will be shown on the resulting screen. This includes any products included in your file that were already in your catalog and were not updated.
- If there are no errors, the error section of the upload result page will be blank.
- You will be presented with a reminder to go edit your product inventory once you have successfully uploaded a product CSV file.
- The option to return to the earlier upload screen always remains when viewing the product upload result screen.

PRODUCT UPLOAD PROCESS: VISUAL

Following, we detail the process of uploading products to the Local Orbit system using the Local Orbit Product Upload interface, with visual aids.

1. **Download the Product Upload CSV template:**

2. **Fill in the Product Upload CSV template with information:**

In this file, I am trying to upload 3 products:
- Boxes of apples
- Boxes of pears
- Cases of pears

The first row is for the product **Apples, New**. I have my organization name and market subdomain correct, but I have put in a short description that is longer than 50 characters (oops). The second row is for the **Pears, New**. I am using the Multiple Pack Listing option to upload 2 units in the same product line of the CSV. I have chosen to include a product code for the pears, but the apples do not use a product code, so it is OK to leave that blank.

3. Save that file, and then upload it by clicking the **Import** button.

Import Products

Upload a **.CSV** file of your organization(s)'s pr

Choose File   LocalOrbit_pr...late (2).csv

Import

4. You will then see a screen of results:

2 products successfully imported.

Make sure to **add inventory to your products** so they will appear in the product catalog!
(If you updated products that already have inventory, nothing about the inventory has changed.)

Return to upload form

Errors

Row 0:
   - Short Description too long (Short description cannot be longer than 50 characters.)

5. If you've uploaded new products or need to edit your inventory for products you've updated, click the link, circled above, to go to your product dashboard.

Success! Next, you fix any errors (for example, I would edit the short description for Apples, New to be less than 50 characters), and upload the same CSV file again. That won't change anything about inventory you already saved.

Uploading a file *will* save all of the information included in the spreadsheet, so be sure that the product data is still exactly what you want it to be!

PRODUCT UPLOAD CSV DATA: TABLE

CSV HEADER	DATA VALUE	REQUIRED?	RESTRICTIONS
Organization	Organization name	Yes	Must be a supplier organization in your market
Market Subdomain	The part that comes before **localorbit.com** in the URL for the market	Yes	Must be a valid subdomain, case-sensitive, for a market you have access to
Product Name	Name of product	Yes	None
Category Name	Name of category	Yes	Must be a valid category in LO system.
Short Description	Short description of product	Yes	Must be <50 chars
Product Code	Alphanumeric string used as product code e.g. A3811	No	Header must be there, but value can be blank if you do not use product codes.
Unit Name	Name of unit	Yes	Must be valid unit name in Local Orbit system, singular.
Unit Description	Description of unit, e.g. what it means for "Each"	Yes	20 characters or less
Price	Price/unit of product	Yes	Decimal number, no $ sign
Multiple Pack Sizes	Whether or not this row in CSV includes multiple pack sizes for this product.	Yes	Must be "Y" or "N", otherwise error. Put "Y" if you use break case pricing (see below).
MPS Unit	Unit name for the additional unit/pack size of product	Yes if Multiple Pack Sizes == "Y", otherwise no	**Only if you put "Y" for Multiple Pack Sizes.** Must be valid unit name in LO system, singular
MPS Unit Description	Description of the MPS unit (see above)	Yes if Multiple Pack Sizes == "Y", otherwise no	**Only if you put "Y" for Multiple Pack Sizes.** None
MPS Price	Price/unit for the MPS unit (see above) of this product	Yes if Multiple Pack Sizes == "Y", otherwise no	**Only if you put "Y" for Multiple Pack Sizes.** Valid price (no $ sign)