ExcelPort

Product Documentation

isenselabs.com

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iSenseLabs

Welcome

Hello and thank you for your interest in ExcelPort. This document is an introduction to ExcelPort's functionality. It is recommended that you familiarize yourself with the contents of this document prior to using ExcelPort.

Example Files

This document comes with generated Excel files, which you may use to follow along. If you do not have such files, you visit our demo page http://demos.isenselabs.com/excelport/admin (user: **demo**, password: **demo**) and generate an Excel file from **Extensions > Modules > ExcelPort > Edit > Export > Export Now**

Without any further ado, let's jump in.

Software Requirements

1) Please keep in mind that ExcelPort is created to work with Microsoft Excel and compatibility with other spreadsheet software is not guaranteed, nor is it covered by our Support Policy.
2) The current version of ExcelPort is compatible with OpenCart installations 1.5.1.3 – 1.5.6.x
3) **php_zip** must be enabled on your PHP installation. If it is not enabled, you should contact your hosting provider and ask them to enable it.
4) **vQmod** is **optional** for OpenCart versions 1.5.2 and above. It is required if:
    a. You need the button **Export / Import** on the listing pages in the admin panel.
    b. You are running OpenCart 1.5.1.3.

    vQmod download and installation instructions can be found here:
    https://code.google.com/p/vqmod/wiki/Install_OpenCart

Chapter 01: Installation & Configuration

These installation instructions assume that you have either a fresh or a customized installation of OpenCart.
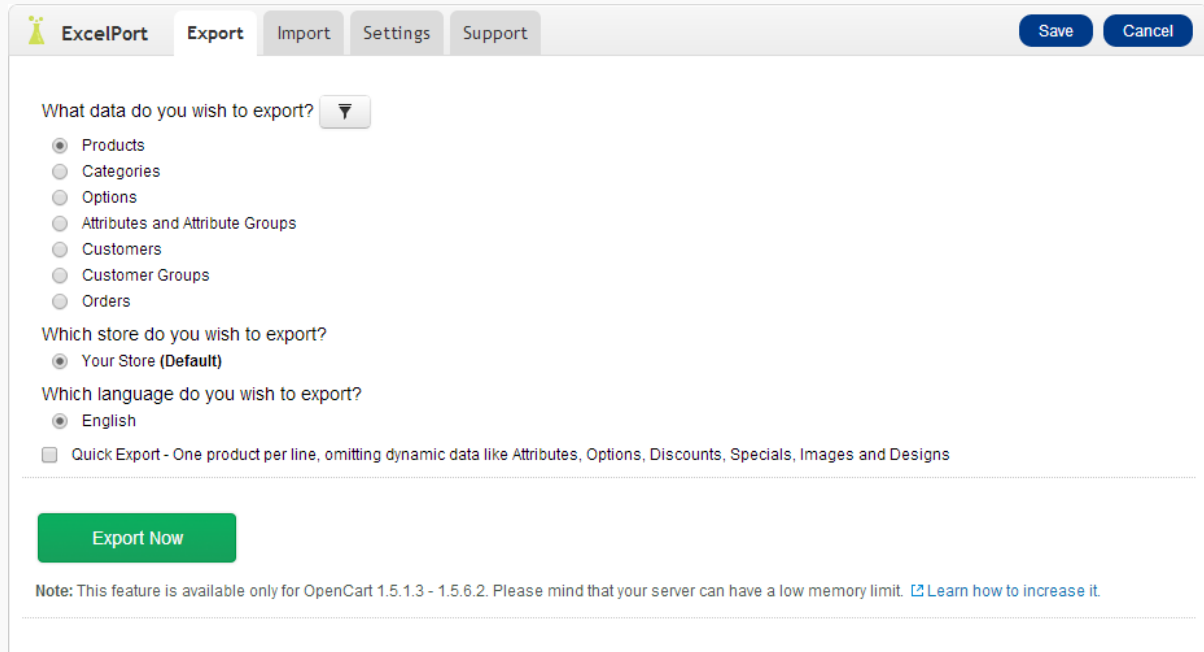
1) Unzip the downloaded ZIP file into a new folder
   BEFORE YOU COPY THE FILES: If your OpenCart is not a fresh installation, files and database backup is highly recommended.

2) Copy all files from **/Upload** folder over your current OpenCart installation preserving the directory structure.

3) Login to your OpenCart admin panel and go to **Extensions > Modules**, find **ExcelPort**, and click the **[Install]** link. Then the screen flickers and **[Edit]** link shows up.

4) Click the **[Edit]** link.
   The ExcelPort control panel is displayed. Now, this is the place where you edit/customize your ExcelPort module. Try clicking around the menu items to get acquainted with the options.

5) Congratulations! ExcelPort is now installed and configured.

Chapter 02: User Interface

The User Interface of ExcelPort is accessible in **Admin > Extensions > Modules > ExcelPort > [Edit]**

This is where you make your Exports and Imports and can fine-tune your ExcelPort installation. There are 4 tabs with options and information:

Export

This is the tab where you do the export. We will now go one by one through each option.

The first set of options is the data type that you wish to export. Currently ExcelPort supports Products, Categories, Options (and Option Values), Attributes and Attribute Groups, Customers and Customer Groups, Orders.

Note the ▼ button. It is used to toggle the export filters, which will be covered in Chapter 03.

The second set of options is for selecting which store you wish to export. Please mind that this option is not available for the Options, Attributes and Customer Groups, because they are associated with all of your stores.
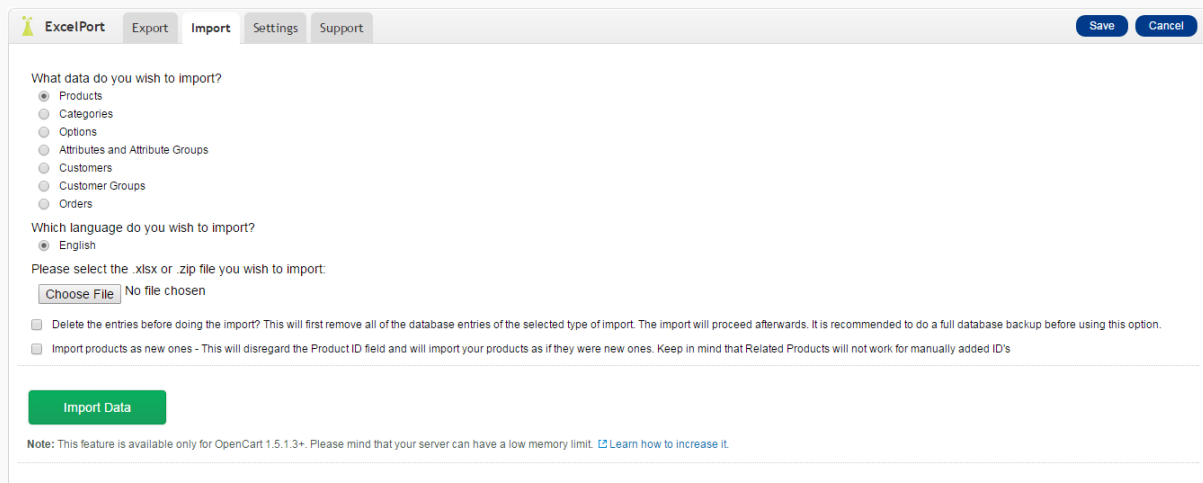
The third set of options is for selecting the language you wish to export. Keep in mind that the list of languages will contain all of the languages, which are currently installed on your OpenCart system.

After the options, there is a list of checkboxes for additional fine-tuning of your export. The Product Export features two modes – **Full Mode** and **Quick Mode** (more information in Chapter 04). With the "Quick Export" checkbox you can select the Product Export Mode. By default **Full Mode** is chosen.

After you have configured the Export parameters, you are ready to click "Export Now" which will start to export your products. When you click the button, a progress bar will be loaded with relevant information to keep track of the export process.

More detailed information on the Export process can be seen in Chapter 03.

Import

The Import tab features options, which are similar to the Export tab.

First you have options to select the type of data you wish to import. Currently ExcelPort supports Products, Categories, Options (and Option Values), Attributes and Attribute Groups, Customers and Customer Groups, Orders.

The second set of options is for the language that you wish to import. The list of languages is retrieved from the installed languages on your ExcelPort installation.

Next you will find a form where you need to upload the file you wish to import. Currently ExcelPort supports .XLSX files and .ZIP files, which contain .XLSX files. Keep in mind that the files you wish to import should have the same structure as the ones that you export. More information on this can be seen in the next chapters.

The final options feature a list of checkboxes for fine-tuning your import.

> The "Delete entries before doing the import?" checkbox is available for all of the types of data – when checked, ExcelPort will first delete the entries, associated with the selected type of data (from the first question) and then will attempt to import your data. Keep in mind that it is recommended to create a backup of your database in case of an import mismatch or error.

> The "Import products as new ones" checkbox is available only if you wish to import products. It will disregard the Product ID field in your imported file and treat your products like new ones. Keep in mind that the Related Products field might populate your database

with incorrect data if you have manually edited the field. More information on this can be found in Chapter 04: Products – Importing Products.

When "Import Data" is clicked your selected file will get uploaded and validated. If everything seems okay, the import process will begin and a progress bar with relevant information will appear. Keep in mind that the progress bar will appear full (unlike the progress bar on Export) because the expected number of entries for import is hard to determine because of the varying data formats, which ExcelPort may encounter.

Further information on the Import process can be found in the next chapters.

Settings
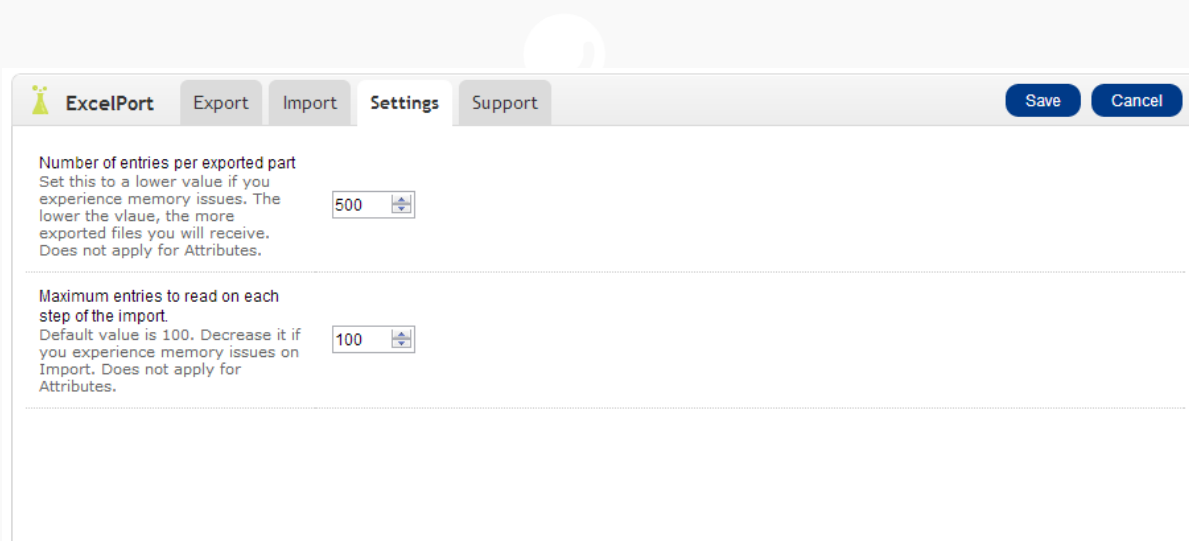
This tab is used to fine-tune the back-end process of the Import and Export. One of the many powerful features of ExcelPort is the Export and Import in chunks, which allows for very large of amounts of data to be ported. Since there are many different servers with different memory options, the number of entries that ExcelPort should handle needs to be set accordingly.

Number of entries per exported part – Upon Export, your data is separated into several files. This option is not regarded when exporting Attributes. This option is used to set the number of entries you wish to have for each file. The values can be set between 50 and 800. If you experience issues related to low server memory on Export or if you experience Error 500, you may try to set this field to a lower value, or try to increase your server memory.

Maximum entries to read on each step of the import – The Import process is also done in chunks for memory preservation. This option is not regarded when importing Attributes. The valid values for this field are between 10 and 800. If you experience memory issues on Import, you may try to set this field to a lower value, or increase your server memory.

Support

The Support tab helps you contact our support team in case you experience issues. You are entitled with one year of Free Premium Support upon purchasing ExcelPort. For more information, please visit our Support Policy here: http://isenselabs.com/pages/supportpolicy

Chapter 03: Exporting & Importing – General Information

It is recommended that you get acquainted with this general information before manipulating data with ExcelPort.

ExcelPort helps you to manage your data by exporting it into an Excel document, which can be edited with Microsoft Excel and then re-imported back into your web store. Currently the supported data, which ExcelPort can export and import is the web store is Products, Categories, Options (and Option Values), Attributes and Attribute Groups, Customers and Customer Groups, Orders.

Extra Fields

By design ExcelPort is compatible with the default OpenCart data and anything extra is not supported by the software. Implementing extra fields, which are added by other third-party OpenCart modules, is not covered by our Support Policy, and can be done via our paid customization services. You may open a support ticket in our website for more information: http://isenselabs.com/users/support

Note: ExcelPort **may** not be compatible with extra fields that have been added by other modules and data losses will occur if extra fields have been added to the tables **product_***, **order_***, **option_*** and other tables related to the exported entities.

Exporting

Upon Export, ExcelPort exports your data into a ZIP, containing .XLSX file(s). For every type of export (Products, Categories, Options, Attributes and Attribute Groups, etc.) the exported Excel tables are in a certain format. You may take a look at your Example files and get a feeling of the way ExcelPort distributes your data. Every type of export will be explained in further detail later on in this documentation.

Export Filters

ExcelPort features advanced export filtering for all export types. You may activate them via the Tiggle Filter button (▼). This filtering function can help you to narrow down the entries that you wish to export. For example, it is useful if you need to edit products the name of which contains the word "Apple". You will see that filter options will appear beneath the selected export type:

The select box on the top is used to determine the filter conjunction. Basically this tells ExcelPort how to combine the export filters. If you choose **OR**, then a product will get exported if it passes the condition of at least one of the specified filters. If you choose **AND**, then a product will get exported only if it passes the conditions of ALL of the specified filters.

You may add as many filters as you want. Note that if you add more filters, the export query may get too complicated for your MySQL server.

The first select box of the filter specifies the field that you wish to filter. The second select box specifies the condition that should be checked. The input box specifies the value with which you are doing the comparison.

Note that if you select a Boolean field like "Status", then appropriate values for comparison would be 0 and 1. For example, if you wish to select all of the products, which are disabled, then you may use the following filter:

Data Editing

Please note that if you wish to use formulas in your Excel sheets, you need to set the Cell format of your field to General:
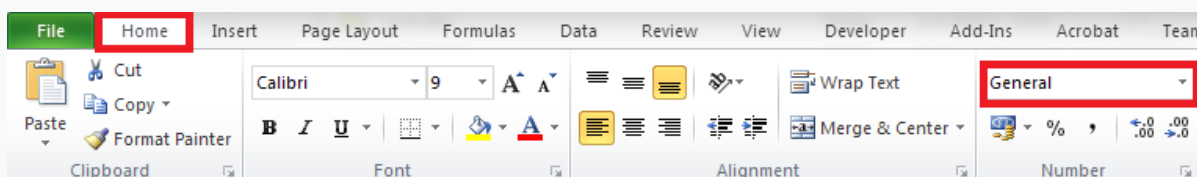
Importing

When importing the provided data should be in the same format like in the exported files. It is a good idea to create a backup of your table in case of unexpected field values, which may disrupt the import process.

You may upload .XLSX files, as well as .ZIP archives, which contain .XLSX files and ExcelPort will do its best to import all of them. Please keep in mind that .XLS files are not supported.

When you import data, it will get imported in the language that you choose. If you are editing already existing data, then only the chosen language will get affected. If you are adding new data, then the chosen language will be imported, and empty values will be set for the other languages.

Chapter 04: Products

ExcelPort gives you the opportunity to choose from two types of Product data management, depending on your needs. The modes of product management are **Full Mode** and **Quick Mode**. We will now take a look at both of these modes.

Full Mode

Full Mode is the default mode for managing your product information. To use it, make sure that the "Quick Export" checkbox is unchecked on Export:

☐ Quick Export - One product per line, on

In this mode, all of your default product data will get exported into one sheet. Keep in mind that the data includes dynamic fields like Attributes, Options, Specials, Discounts, etc. This means that all of your products will get exported by distributing each product on 26 lines. You may open the example file **Example_Products_Full.xlsx** to get acquainted with the format.

Above is the initial structure of the exported data. You will see that on the left next to each product there is a plus sign. It is used to expand the product data. Note that if you wish to expand a product's data, you should use the plus sign that is below the line of the desired product:

For this tutorial we will use the product Apple Cinema 30''. Let's expand it to see all of the data.

We will see that the product data is distributed from line 288 to line 313. In the next section we will have a look at the fields of the products.

We will separate them into two types – **Static** and **Dynamic**. The **Static** fields are those that can hold a single value. The **Dynamic** fields are those that can hold an indefinite number of values.

You will gain a better understanding of these fields in the next sections.

Product Fields - Static Data

The Static fields are those that can be represented with a single cell in the Excel document. As an analogy, they are all of the fields in the **General**, **Data** and **Links** tab (including the points in the **Reward Points** tab):

In the generated ExcelPort file, the **Static** fields are the following:

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40	iPhone	product 11	20,24	Enabled	data/demo/iphone_	0.00000000	0.00000000	0.00000000	10.00000000	Apple	0	970	101.0000	42	<p class=&qu
41	iMac	Product 14	27	Enabled	data/demo/imac_1.j	0.00000000	0.00000000	0.00000000	5.00000000	Apple	0	977	100.0000	42	<div>Just w
42	Apple Cinema	Product 15	20,28	Enabled	data/demo/apple_c	1.00000000	2.00000000	3.00000000	12.50000000	Apple	0	990	100.0000	40,41	<p><font

289	General		Attribute Name	Processor > Clockspeed												
290	Meta Tag Description	Attribute	Attribute Text	100mhz												
291	Meta Tag Keywords		Option Value	Required: Yes	Required: Yes	2011-02-20	Required: Yes	test	Required: Yes	Small	Large	Medium	Required: Ye	Required: Ye	Blue	Yellow	Red
292	Product Tags		Quantity							96	300	146				300	200	92
293	Data		Subtract Stock							Yes	Yes	Yes				No	Yes	Yes
294	UPC		Price		Date					+10.0000	+30.0000	+20.0000				+3.0000	+2.0000	+0
295	EAN		Points							+1	+3	-2				+0	+0	+0
296	JAN	Option	Weight	File			Text		Radio	+10.00000000	+30.00000000	+20.00000000	Textarea	Select	+3.00000000	+2.00000000	+4.0
297	ISBN		Customer Group	Default	Default	Default										
298	MPN		Priority	1	1	1										
299	Location		Price	88.0000	77.0000	66.0000										
300	Tax Class	Taxable Good	Date Start	0000-00-00	0000-00-00	0000-00-00										
301	Minimum Quantity	2	Date End	0000-00-00	0000-00-00	0000-00-00										
302	Subtract Stock	Yes	Discount	Quantity	10	20	30									
303	Out Of Stock Status	Out Of Stock	Customer Group	Default												
304	Requires Shipping	Yes	Priority	1												
305	SEO Keywords	test	Price	90.0000												
306	Date Available	2009-02-04	Special	Date Start	0000-00-00											
307	Length Class	Centimeter	Date End	0000-00-00												
308	Weight Class	Kilogram	Image Path	data/demo/cano	data/demo/compaq_	data/demo/hp_1.jpg	data/demo/ca	data/demo/canon_eos_5d_2.jpg								
309	Sort Order	0	Image	Sort Order	0	0	0	0	0							
310	Links			Customer Group		Default										
311	Downloads		Reward Poin	Reward Points	400	100										
312	Filters			Store	Default											
313	Profiles		Design	Layout Override	Default											

314	43	MacBook	Product 16	18,20	Enabled	data/demo/macbool	0.00000000	0.00000000	0.00000000	0.00000000	Apple	0	929	500.0000		<div><p&
340	44	MacBook Air	Product 17	18,20	Enabled	data/demo/macbool	0.00000000	0.00000000	0.00000000	0.00000000	Apple	0	1000	1000.0000		<div>MacBo
	45	MacBook Pro	Product 18	18	Enabled	data/demo/macbool	0.00000000	0.00000000	0.00000000	0.00000000	Apple		998	2000.0000		<div class=&q

On the **first line** (in this case, line 288) we have the fields that are visible when you first export your table. From left to right they are:

Product ID – this is used as the unique identifier of your product. It is the ID of your product in the MYSQL database. You may use this field to achieve a number of goals:

- If you leave this field empty, ExcelPort will try and create a new product and will automatically assign a new and unique ID of the product.
- If you put a value in this field (like in our case 42), ExcelPort will do one of the following:
  - If a product with this ID exists in the database, ExcelPort will update all of its data with the one provided in the Excel file.
  - If the ID does not exist, ExcelPort will create a new product with the given ID.
  - You may also use this ID when you wish to relate your product to other products. We will talk about this later when we introduce you to the **Related Products** field.

Name – this is the name of your product. Keep in mind that this field must always have a value, otherwise the Import process will stop on the first occurrence of an empty Name field.

Model – your product model.

SKU – The SKU of your product.

Status – Enabled/Disabled, this is the product status.

 Image – the main image of the product. The sub-images will be discussed in the **Dynamic** fields section. Please note that the path is relative to the /image/ folder of your OpenCart installation.

Length – the length of your product. Decimal point should be marked with a dot.

Width – the width of your product. Decimal point should be marked with a dot.

Height – the height of your product. Decimal point should be marked with a dot.

Weight – the weight of your product. Decimal point should be marked with a dot.

Manufacturer – the manufacturer of your product. The value should be the name of one of the manufacturers that you already have in your store.

Stores – the IDs of the stores where you wish to place your products. Comma separated. You may find the mapping of ID-Store in the **Meta** sheet in the Excel file.

Quantity – The quantity of your product.

Price – The price of your product. Decimal point should be marked with a dot.

Related Products – The IDs of the products with which you wish to relate your product. Comma separated. These IDs correspond to the **Product ID** field of each product.

Description – The product description.

The rest of the **Static** data is distributed in the left column and the first entry in the **Reward Points** section (in our case A289:B313 and E311):

Meta Tag Description – The meta tag description of your product.

Meta Tag Keywords – The meta tag keywords of your product.

Product Tags – The tags of your product. Comma separated.

UPC – The UPC of your product.

EAN – The EAN of your product.

JAN – The JAN of your product.

ISBN – The ISBN of your product.

MPN – The MPN of your product.

Location – The location of your product.

Tax Class – The Tax class of your product. The value should be the name of the available Tax Classes in your web store.

Minimum Quantity – The minimum purchase quantity of your product.

Subtract Stock – Yes/No. Whether you want to enable or disable Subtract stock.

Out of Stock Status – The status you wish your product to have when it gets out of stock. The value should be the name of one of the Stock Statuses in your web store.

Requires Shipping – Yes/No. Whether your product requires shipping or not.

SEO Keywords – The SEO keywords your product has in the URL.

Date Available – Format **YYYY-MM-DD**.

Length Class – The length class you wish your product to have. The value should be the name of one of the length classes in your web store.

Weight Class – The weight class you wish your product to have. The value should be the name of one of the weight classes in your web store.

Sort order – The sort order of your product.

Downloads – The IDs of the downloads for your product. Comma separated. You may find the ID-Name mapping of your downloads in the **Meta** sheet.

Filters - The IDs of the filters for your product. Comma separated. You may find the ID-Name mapping of your filters in the **Meta** sheet.

Profiles – The profiles, mapped to your products. This is a special type of data, which is a comma-separated mapping between Profile ID's and Customer Groups ID's. The ID's of the profiles and customer groups can be seen in the **Meta** sheet. Example data is "**1:2,12:23**" (without the quotes)

The green numbers represent the Profile ID's, while the red numbers represent the Customer Group ID's.

Reward Points – Number of points needed to buy this item. If you don't want this product to be purchased with points, leave the field with a value = 0.

Product Fields - Dynamic Data

The Dynamic data needs an indefinite number of cells, which is the main reason we arrived at the decision to distribute the data in 26 lines. The **Dynamic** data fields correspond to the **Attribute**, **Option**, **Discount**, **Special**, **Image**, **Reward Points** and **Design** tabs of your Product edit page:
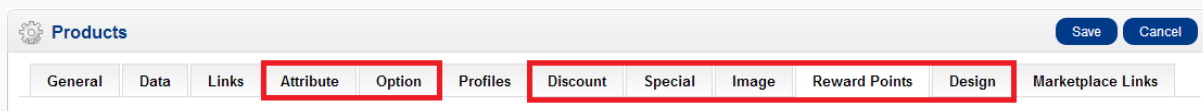
In the generated ExcelPort file, the **Dynamic** fields are the following:

236	40	iPhone	product 11		20,24	Enabled	data/demo/iphone_	0.00000000	0.00000000	0.00000000	10.00000000	A
262	41	iMac	Product 14		27	Enabled	data/demo/imac_1.j	0.00000000	0.00000000	0.00000000	5.00000000	A
288	42	Apple Cinema	Product 15		20,28	Enabled	data/demo/apple_c	1.00000000	2.00000000	3.00000000	12.50000000	A
289	General			Attribute Name	Processor > Clockspeed							
290	Meta Tag Description		Attribute	Attribute Text	100mhz							
291	Meta Tag Keywords			Option Value	Required: Yes	22:25	Required: Yes	Checkbox 4	Checkbox 2	Checkbox 3	Checkbox 1	R
292	Product Tags			Quantity				3998	194	2696	48	
293	Data			Subtract Stock				Yes	Yes	Yes	Yes	
294	UPC			Price				+40.0000	+20.0000	+30.0000	+10.0000	
295	EAN			Points				+0	+0	+0	+0	
296	JAN		Option	Weight	Time		Checkbox	+40.00000000	+20.00000000	+30.00000000	+10.00000000	S
297	ISBN			Customer Group	Default	Default	Default					
298	MPN			Priority	1	1	1					
299	Location			Price	88.0000	77.0000	66.0000					
300	Tax Class	Taxable Good		Date Start	0000-00-00	0000-00-00	0000-00-00					
301	Minimum Quantity	2		Date End	0000-00-00	0000-00-00	0000-00-00					
302	Subtract Stock	Yes	Discount	Quantity	10	20	30					
303	Out Of Stock Status	Out Of Stock		Customer Group	Default							
304	Requires Shipping	Yes		Priority	1							
305	SEO Keywords	test		Price	90.0000							
306	Date Available	2009-02-04		Date Start	0000-00-00							
307	Length Class	Centimeter	Special	Date End	0000-00-00							
308	Weight Class	Kilogram		Image Path	data/demo/cano	data/demo/canon_lo	data/demo/hp_1.jpg	data/demo/cor	data/demo/ca	on_eos_5d_1.jpg		
309	Sort Order	0	Image	Sort Order	0	0	0	0	0			
310	Links			Customer Group		Default						
311	Downloads		Reward Poin	Reward Points		100						
312	Filters	1,2		Store	Default							
313			Design	Layout Override								
314	43	MacBook	Product 16		18,20	Enabled	data/demo/macbool	0.00000000	0.00000000	0.00000000	0.00000000	A
340	44	MacBook Air	Product 17		18,20	Enabled	data/demo/macbool	0.00000000	0.00000000	0.00000000	0.00000000	A
366	45	MacBook Pro	Product 18		18	Enabled	data/demo/macbool	0.00000000	0.00000000	0.00000000	0.00000000	A

As you can see, they are populated from left to right, depending on how many items you need. We will now go through each of the Dynamic fields and explain how you can populate the data.

Attributes

An attribute consists of two fields – the Attribute name and the Attribute text. When entering attributes it is essential for the names to correspond to the attribute names in your OpenCart installation.

NOTE: If there are two or more attributes in the same attribute groups with the same name, then ExcelPort will not be able to determine which attribute to use, which may cause unexpected errors. Make sure that your attributes all have unique names. You may take advantage of the Attribute export and import function of ExcelPort.

If you enter an attribute name, which cannot be found in the database, the whole attribute will be disregarded. There are no limitations for the **Attribute text**. Here is an example of an attribute:

Clockspeed
100mhz

Other attributes need to be added to the right, while making sure that there are no empty Attribute name cells, and each Attribute name corresponds to an attribute in the web store. You may find a list of the available attributes in the **Meta** sheet.

Options

We will now discuss how to fill in the options. Each option consists of two parts – a Header part and a Value part.

Required: Yes	Large	Small	Medium
	300	96	146
	Yes	Yes	Yes
	+30.0000	+10.0000	+20.0000
	+3	+1	-2
Radio	+30.00000000	+10.00000000	+20.00000000

Header part   **Value part**

Depending on the **Value parts** of the Options, we can separate them into three groups:

1. **Full-Value Options** – These are the Options that require all of the values in the Value part to be filled in. Full-Value options are **Radio**, **Checkbox**, **Select** and **Image** options. The Value part consists of:
    a. **Option Value** – This is the name of the Option value and should correspond to the option values in your web store. If an option value is detected, that is not part of the web store, it will be disregarded.
    b. **Quantity** – The quantity you wish to set for this option value.
    c. **Subtract stock** – Whether you wish to subtract the stock. Value should be **Yes** or **No**.
    d. **Price** – The price modification of the value. It should start with a plus or a minus sign, depending on the type of modification you need. A dot should be used for a decimal point.
    e. **Points** – The number of points you wish to assign to the option value. It should start with a plus or minus sign to indicate how you wish to manage the points.
    f. **Weight** – The weight modification to your product. It should start with a plus or minus sign, depending on the needed modification.

    Here is an example of an option value for a Full-Value option:

Large
300
Yes
+30.0000
+3
+30.00000000

2. **Single-Value Options** – These are the options that require a single value to be set. Single-Value options are **Text**, **Textarea**, **Date**, **Time** and **Date & Time**. The Value part consists only of an Option value, like in the example below:

3. **No-Value Options** – These are the options that do not have a value. The only such option is the **File**. This means that if you wish to set a file option, you would only need a Header part.

NOTE: If you have two or more option values within the same option and these option values have the same name, then ExcelPort will not be able to import them correctly. Please make sure that ALL of your option values in an option have a unique name. You may take advantage of the Options export/import function of ExcelPort.

The **Header part** of the options is separated into two subparts. On the first line we enter if we want the option to be required or not. The valid entries are **Required: Yes** and **Required: No** The second line contains the name of the option. You may find a valid list of option names in the Meta sheet.

NOTE: If you have two or more options with the same name, then ExcelPort will not be able to determine the correct option to import. Please make sure that ALL of your options have unique names. You may take advantage of the Options export/import function of ExcelPort.

Here is an example of a Header part:

All of the options should be entered from left to right, starting with the Option Header, followed by the Option Value, for each option. Here is an example:

Required: Yes	Required: Yes	22:25	Required: Yes	Large	Small	Medium
				300	96	146
				Yes	Yes	Yes
				+30.0000	+10.0000	+20.0000
				+3	+1	-2
File	Time		Radio	+30.00000000	+10.00000000	+20.00000000

Discounts

Each discount is composed of six fields:

1. **Customer Group** – The Customer group for which you want to apply the discount. The customer group should contain a value that is already set in your web store. A valid list of customer groups can be seen in the **Meta** sheet.
2. **Priority** – The priority of the Discount
3. **Price** – The price for the discount
4. **Date Start** and **Date End** – Format **YYYY-MM-DD**
5. **Quantity** – The Discount quantity

Example:

Default
1
88.0000
0000-00-00
0000-00-00
10

Specials

Each special is composed of five fields:

1. **Customer Group** – The Customer group for which you want to apply the special. The customer group should contain a value that is already set in your web store. A valid list of customer groups can be seen in the **Meta** sheet.
2. **Priority** – The priority of the special.
3. **Price** – The price for the special.
4. **Date Start** and **Date End** – Format **YYYY-MM-DD**

Example:

Default
1
90.0000
0000-00-00
0000-00-00

Images

This is a list of all of the sub-images of the product. If you wish to set a main image, it should be done in the general fields. Each image is composed of two values – the Image path and the Sort order. Here is an example of a list of images:

data/demo/canon_lo	data/demo/compaq	data/demo/car	data/demo/car	data/demo/hp
0	0	0	0	0

Please note that the image path is relative to the /image/ folder of your OpenCart installation.

Reward Points

The reward points need to be mapped to the customer groups. Keep in mind that the first column of the reward-points list is reserved for the global reward points that are assigned to the product. Population should start from the second column:

The first line should be the Customer group name. A valid list of Customer groups can be found in the Meta sheet in the Excel file. The second line contains the points.

Designs

The designs is where you map your product to a certain layout depending on the store. The Stores come prepopulated and all you need to set is the Layout, associated to each store. A valid list can be found in the Meta sheet in the Excel file.

OpenStock

OpenStock is a great third-party extension if you wish to set up custom prices for different combinations of options. The extension download can be found on the following pages:

http://www.opencart.com/index.php?route=extension/extension/info&extension_id=2833

https://shop.openbaypro.com/index.php?_route_=openstock

As of version 1.8, ExcelPort has OpenStock integrated as part of the **Full mode** product export. Note that since dynamic data is not supported in Quick mode product export, this means that OpenStock is not supported for Quick mode as well.

ExcelPort automatically detects if OpenStock is installed on your webstore. If this is the case, then the vQmod file **/vqmod/xml/excelport_openstock.xml** gets automatically installed and you are good to go.

Naturally, OpenStock adds additional fields to the product data:

As a result the Full mode Export has 32 lines per product, instead of the original 26:

You will first notice that a new column R is introduced (top right of screenshot above). The new Column contains a boolean value **1** or **0**. This column corresponds to the OpenStock field **Admin > Products > Edit > Stock Control > Has Options**.

The OpenStock fields in the .XLSX file look like this:

1. **Combination -** The first line contains the Option combination. The options listed here **MUST** already exist as available option values for your specific product. In the example above, our product must have two option values "Black" (as part of a Color option for example) and

"XL" (as part of a Size option for example). The Combination "Black|XL" is considered the OpenStock combination. **Note**: The values in the combination **MUST** be delimited with **|**

2. **SKU** – The SKU number of the OpenStock combination. This field accepts any value.
3. **Weight** – The Weight of the OpenStock combination. This field **MUST** be numeric. Decimal numbers are allowed (e.g. 2.334) – the decimal symbol **MUST** be a dot.
4. **Stock** – The stock quantity of the Combination. **MUST** be an integer value.
5. **Price** – The price of the Combination. **MUST** be a numeric value. Decimal numbers are allowed with a dot as the decimal symbol. Example: 3.554
6. **Status** – Can be either **Enabled** or **Disabled**. Controls whether the OpenStock combination is available for your customers.
7. **Image** – **MUST** be an existing image in your store. The path should be relative to the **/image/** folder of your OpenCart installation. In our example the OpenStock Image path is **data/demo/cannon.jpg**. The real image is positioned in **/image/data/demo/cannon.jpg** The image paths are case sensitive.

Options Boost

Options Boost is a great third-party extension if you wish to include extra information in your options like SKU and Image. The extension download can be found on the following pages:
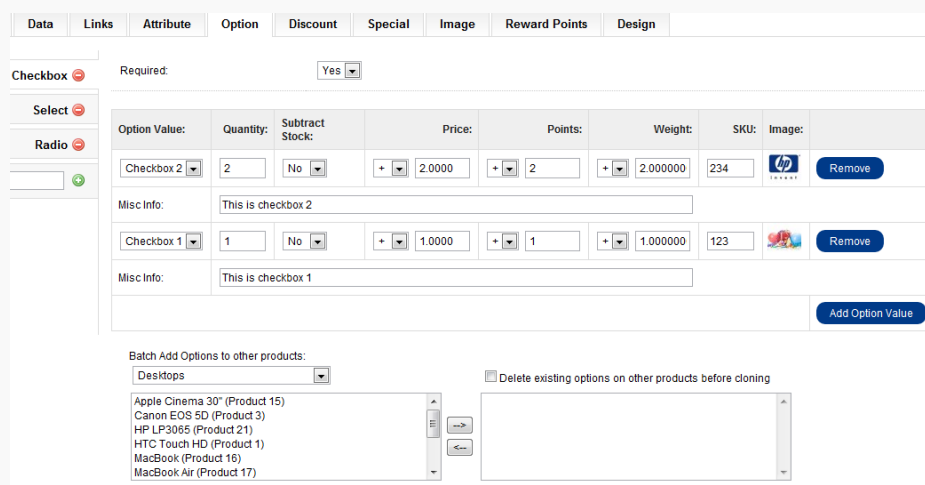
http://www.opencart.com/index.php?route=extension/extension/info&extension_id=6804

As of version 1.8.3, ExcelPort has Options Boost integrated as part of the **Full mode** product export. Note that since dynamic data (Options, Attributes, etc.) is not supported in Quick mode product export, this means that Options Boost is not supported for Quick mode as well.

If you have OpenStock already installed on your store, it will take precedence over Options Boost. Your ExcelPort will start exporting/importing for OpenStock in this case.

ExcelPort automatically detects if Options Boost is installed on your webstore. If this is the case, then the vQmod file **/vqmod/xml/excelport_optionsboost.xml** gets automatically installed and you are good to go.

Naturally, Options Boost adds additional fields to the product options:

The following 4 new rows are added to the Full mode options in the product export/import:

1. **SKU** – the SKU number of the Option Value
2. **Image** – the image of the Option Value. Should be a valid image path, relative to the /image/ folder of your OpenCart store.
3. **Override** – determines whether the SKU of the Option Value overrides the Model of the product
4. **Misc Info** – text field for the Misc Info field of Options Boost

Note: As a result of the extra 4 rows added by Options Boost, the Full mode product export/import distributes the products in 30 rows per product (instead of 26 like the default ExcelPort installation).

Quick Mode

In Quick Mode, all of your products are distributed into single lines for faster data manipulation. The fields that are contained in the Quick More correspond to the Static Data in Full Mode. Please note that the Dynamic Data fields are not included. The **Product Profiles** field is also excluded.

You may open your example file **Example_Products_Quick.xlsx** to take a look at the fields.

	Product ID	Name	Model	SKU	Description	Meta Tag Description	Meta Tag Keywords	Tags	UPC
2	28	HTC Touch HD	Product 1		<p>HTC Touch - in High Definition. Watch music videos and streaming con				
3	29	Palm Treo Pro	Product 2		<p>Redefine your workday with the Palm Treo Pro smartphone. Perfectly b				
4	30	Canon EOS 5D	Product 3		<p>Canon's press material for the EOS 5D states that it 'defines (a) new D				
5	31	Nikon D300	Product 4		<div class="cpt_product_description "><div>Engineered v				
6	32	iPod Touch	Product 5		<p>Revolutionary multi-touch interface.<b				
7	33	Samsung SyncMaste	Product 6		<div>Imagine the advantages of going big without slowing down. The big				
8	34	iPod Shuffle	Product 7		<div>Born to be worn.<p>Clip on the wo				
9	35	Product 8	Product 8		<p>Product 8</p>				
10	36	iPod Nano	Product 9		<div><p>Video in your pocket.</p>				
11	40	iPhone	product 11		<p class="intro">iPhone is a revolutionary new mobile phone				

Quick Mode is very useful when you wish to edit a lot of static information in one go (for example increase the prices, or paste product quantities from other tables). When you import edited products (with Product ID's) in Quick mode, the dynamic data of your edited products will not get affected.

Exporting Products

Before the Export of the products, you may choose the mode which you wish to use. By default, the Exported uses Full Mode, but the "Quick Mode" checkbox allows you to export your data into Quick Mode. Keep in mind that the products will be exported into chunks, by using the setting in **Settings > Number of entries per exported part**

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Adding New Products

When you generate an Excel file in Full Mode, the second sheet contains an empty template if you need to enter new products:

							0.000000000.000000000.000000000.00000000--- None ---	0	0	0.0000		
	PRODUCT_NAME											
General		Attribute	Attribute Name									
Meta Tag Description			Attribute Text									
Meta Tag Keywords		Option	Option Value									
Product Tags			Quantity									
Data			Subtract Stock									
SKU			Price									
UPC			Points									
EAN			Weight									
JAN		Discount	Customer Group									
ISBN			Priority									
MPN			Price									
Location			Date Start									
Tax Class			Date End									
Minimum Quantity			Quantity									
Subtract Stock		Special	Customer Group									
Out Of Stock Status			Priority									
Requires Shipping			Price									
SEO Keywords			Date Start									
Date Available			Date End									
Length Class		Image	Image Path									
Weight Class			Sort Order									
Sort Order	0	Reward Points	Customer Group	Default for store								
Links			Reward Points	0								
Downloads		Design	Store	Default								
Filters			Layout Override									

You may copy and paste this template to your Products sheet after all your products and fill in your data. The template comes with predefined Data validations, which make sure that you always set the correct value. Keep in mind that there should be no empty lines in between the products and the **Product Name** cell should always contain a value.

Extra Tip for Full Mode

A clever way to quickly add new products is to create a new sheet (e.g. **Data**) and populate the product data line-by-line. The following strategy is also useful if you already have an Excel table, containing all of your product data, distributed into single lines. You may use the following formula for the fields you need and simply drag down the whole product:

```
=INDIRECT("<NAME_OF_DATA_SHEET>!<COLUMN_OF_SOURCE_VALUE>"&((ROW()-
<ROW_OF_FIRST_REPEATED_PRODUCT>)/26
+ <ROW_OF_FIRST_VALUE_IN_DATA_SHEET>))
```

Here is a link to a video tutorial which explains how to apply this formula:

https://www.youtube.com/watch?v=3pJ0Y6OMs0E

By default the cell format in the generated file is set to **Text**. Keep in mind that in order for the formula to work, you should set the cell format to **General** (this is displayed in the video).

Extra Tip for Quick Mode

ExcelPort has several fields, which are comma-separated ID's. Such a field is the Categories field – it contains comma-separated Category ID's, which represent the categories of your store. To learn how to assign a product easily to new categories in ExcelPort's Quick Mode you can refer to this video tutorial:

https://www.youtube.com/watch?v=EhO-XKNwVcM

Importing Products

When you import your products, you are able to choose from two options, which will fine-tune the importing process:

Delete the entries before doing the import? – This will delete all of your products before the import begins. Please note that it is a good idea to have a backup of your system in case unexpected fields are encountered by the importer.

Import products as new ones – This will disregard the Product ID field and all of your products will get imported as new ones. Please mind that if you have manually added new products in your table and have set the Product ID field, and used that Product ID field in the Related Products field, then this might cause product mismatches, because the importer will regard the Product ID field as empty and will automatically assign a Product ID for your product.

It is important to note that when you import your products, a set of criteria needs to be met:

1) The imported file needs to be in an .XLSX format (or a .ZIP format, containing .XLSX files)
2) The first sheet needs to be called **Products**
3) The data needs to be structured either like in Full Mode or Quick Mode
4) The products need to be placed one after the other with no empty spaces between them
5) The Product Name field must always contain a value
6) The table headers need to be the same like in Full Mode or Quick Mode – ExcelPort uses these headers to determine which mode to use for Import.
7) The fields should be in the same format like in the exported file. For example, the product Status should be either **Enabled** or **Disabled** – if another value is presented, then Disabled will be used. Another example is the Categories – you should use comma-separated Category ID's for this field – if you provide the Category name, then the Importer will not assign your product to the needed category. For information on the rest of the fields, please refer to the **Static Data** and **Dynamic Data** sections in this chapter.
8) Make sure that your imported fields follow the guidelines, explained in this chapter.

Please note that the Stores field should contain comma-separated Store ID's. Zero "0" is a valid Store ID and is used for your default store. If you leave the Stores field empty (""), then your products will not get associated to any store and you will not see them in the store front.

Chapter 05: Categories

ExcelPort features Category import and export. In this chapter we will examine this feature in detail.

Category Fields

You may open your example file **Example_Categories.xlsx** and get acquainted with the format.

	Category ID	Category Name	Description	Meta Tag Description	Meta Tag Keywords	Parent ID	Stores	Filters	SEO Keyword	Image	Top	Columns	Sort Order	Status	Design
2	17	Software				0	0				Yes	1	4	Enabled	
3	18	Laptops & Note	<p>Shop Laptop feature only the best laptop d	0		0			data/demo/hp_	Yes	0	2	Enabled	
4	20	Desktops		<p>Example	Example of category description	0	0		desktops	data/demo/con	Yes	1	1	Enabled	
5	24	Phones & PDAs				0	0				Yes	1	5	Enabled	
6	25	Components				0	0				Yes	1	3	Enabled	
7	26	PC				20	0		pc		No	0	1	Enabled	
8	27	Mac				20	0		mac		No	0	2	Enabled	
9	28	Monitors				25	0				No	0	1	Enabled	
10	29	Mice and Trackballs				25	0				No	0	1	Enabled	
11	30	Printers				25	0				No	0	1	Enabled	
12	31	Scanners				25	0				No	0	1	Enabled	
13	32	Web Cameras				25	0				No	0	1	Enabled	
14	33	Cameras				0	0	2,3			Yes	1	6	Enabled	0:3

Above is a screenshot of the category fields. We will now go in further detail through each one:

Category ID – The database ID of your category. This field is important when you wish to set the parent of your category. You may also leave this field blank, in which case ExcelPort will create a new category with an automatically assigned Category ID.

Category Name – This is the name of your category. Please note that this field should not be left blank.

Description – The category description.

Meta Tag Description – The meta tag description of your category.

Meta Tag Keyword – The meta tag keywords for your category.

Parent ID – The Category ID of the parent. If your category has no parent, then set this field to 0.

Stores – Comma-separated Store ID's. Note that if you leave this field blank (""), then your category will not get assigned to any stores. Zero "0" corresponds to your default store. A list of all your Store ID's can be found in the Meta sheet in the exported file.

Filters – Comma-separated Filter ID's. A full list can be found in the Meta sheet of the exported file.

SEO Keyword – The URL keyword for the category.

Image – The image for your category. Please note that the path is relative to the /image/ folder of your OpenCart installation.

Top – A **Yes/No** value. Tells OpenCart whether or not to put your category in the Main Menu. Only works for the top parent categories.

Columns – Number of columns to use for the bottom 3 categories. Only works for the top parent categories.

Sort Order – The sort order of your category.

Status – The status of the category. Can be either **Enabled** or **Disabled**.

Design – A field that maps your category to a layout for a specific store. The format is **<Store1-ID>:<Layout1-ID>,<Store2-ID>:<Layout2-ID>** An example would be **0:3,1:2** where 0 and 1 are the Store ID's and 3 and 2 are the Layout ID's. You may find a list of the Store ID's and Layout ID's in the Meta sheet of your exported file.

Exporting Categories

The exporting process if very straight-forward. You simply need to go to the Export tab, select to export Categories, select a store and language and you're good to go. Keep in mind that the categories will be exported into chunks, by using the setting in **Settings** > **Number of entries per exported part**

Importing Categories

When you import your categories, you are able to choose an option, which will fine-tune the importing process:

Delete the entries before doing the import? – This will delete all of your categories before the import begins. Please note that it is a good idea to have a backup of your system in case unexpected fields are encountered by the importer.

It is important to note that when you import your categories, a set of criteria needs to be met:

1) The imported file needs to be in an .XLSX format (or a .ZIP format, containing .XLSX files)
2) The first sheet needs to be called **Categories**
3) The data needs to be structured like in the exported file.
4) The categories need to be placed one after the other with no empty spaces between them
5) The Category Name field must always contain a value
6) The fields should be in the same format like in the exported file. For example, the product Status should be either **Enabled** or **Disabled** – if another value is presented, then Disabled will be used. Another example is the Filters – you should use comma-separated Filter ID's for this field – if you provide the Filter name, then the Importer will not assign your category to

the needed filter. For information on the rest of the fields, please refer to the **Category Fields** section in this chapter.

7) Make sure that your imported fields follow the guidelines, explained in this chapter.

Please note that the Stores field should contain comma-separated Store ID's. Zero "0" is a valid Store ID and is used for your default store. If you leave the Stores field empty (""), then your categories will not get associated to any store and you will not see them in the store front.

Chapter 06: Options

ExcelPort features Options (and Option Values) import and export. In this chapter we will examine this feature in detail.

Option and Option Value Fields

You may open your example file **Example_Options.xlsx** and get acquainted with the format.

	A	B	C	D	E	F	G	H
1	Option ID	Option Name	Option Type	Option Sort Order	Option Value ID	Option Value Name	Option Value Image	Option Value Sort Order
2	1	Radio	Radio	2	32	Small		1
3					31	Medium		2
4					43	Large		3
5	2	Checkbox	Checkbox	3	23	Checkbox 1		1
6					24	Checkbox 2		2
7					44	Checkbox 3		3
8					45	Checkbox 4		4
9	4	Text	Text	4				

Above is a screenshot of the option fields. We will now go in further detail through each one:

Option fields

Option ID – The database ID of your option. You may leave this field blank, in which case ExcelPort will create a new option with an automatically assigned Option ID.

Option Name – This is the name of your option. Please note that this field should not be left blank.

Option Type – The type of your option. Valid types can be found in the Meta sheet. Note that this field should not be left blank.

Option Sort Order – The sort order of your option. Can be integer or left empty.

Note that the option fields are considered as the "main" fields of the option. After them in columns E - H we can position the option values, which correspond to the option. In the screenshot above the option values E2:H4 correspond to the option A2:D2. Note that the option values are not mandatory, which means that you can have an option without any option values.

Option Value Fields

Option Value ID – The database ID of your option value. You may leave this field blank, in which case ExcelPort will create a new option with an automatically assigned Option ID. Note that if the Option ID field of the corresponding option is left empty, then the Option Value ID's of this option will also

be considered empty, regardless of the value of the Option Value ID column. In other words, if you let the importer to automatically assign ID's to your main options, then the option values will also get their ID's assigned automatically.

Option Value Name – This is the name of your option value. Please note that this field should not be left blank.

Option Value Image – The image of your option value. The path of the image should be relative to your /image/ folder of your OpenCart installation.

Option Value Sort Order – The sort order of your option value. Can be integer or left empty.

Exporting Options

The exporting process if very straight-forward. You simply need to go to the Export tab, select to export Options, select a language and you're good to go. Keep in mind that the options will be exported into chunks, by using the setting in **Settings** > **Number of entries per exported part**

Importing Options

When you import your options, you are able to fine-tune the importing process:

Delete the entries before doing the import? – This will delete all of your options before the import begins. Please note that it is a good idea to have a backup of your system in case unexpected fields are encountered by the importer.

It is important to note that when you import your options, a set of criteria needs to be met:

1) The imported file needs to be in an .XLSX format (or a .ZIP format, containing .XLSX files)
2) The first sheet needs to be called **Options**
3) The data needs to be structured like in the exported file.
4) The options (with their corresponding Option Values) need to be placed one after the other with no empty spaces between them. You may refer to the **Example_Options.xlsx** file.
5) The Option Name and Option Type field must always contain a value.
6) If your option has option values, then the Option Value Name field must always contain a value.
7) Make sure that your imported fields follow the guidelines, explained in this chapter.

Chapter 07: Attributes and Attribute Groups

ExcelPort features Attributes and Attribute Groups import and export. In this chapter we will examine this feature in detail.

Attributes Fields

You may open your example file **Example_Attributes.xlsx**, select the Attributes sheet and get acquainted with the format.

	A	B	C	D
1	Attribute ID	Attribute Name	Attribute Group	Sort Order
2	1	Description	6	1
3	2	No. of Cores	6	5
4	3	Clockspeed	6	3
5	4	test 1	3	1
6	5	test 2	3	2
7	6	test 3	3	3
8	7	test 4	3	4
9	8	test 5	3	5
10	9	test 6	3	6
11	10	test 7	3	7
12	11	test 8	3	8

Above is a screenshot of the attribute fields. We will now go in further detail through each one:

Attribute ID – The database ID of your attribute. You may leave this field blank, in which case ExcelPort will create a new attribute with an automatically assigned Attribute ID.

Attribute Name – This is the name of your attribute. Please note that this field should not be left blank.

Attribute Group – The attribute group ID, where your attribute is assigned. Please note that this field should not be left blank. A list of the available Attribute Groups is available in the Attribute Groups sheet.

Sort Order – The sort order of your attribute.

Attribute Groups Fields

You may open your example file **Example_Attributes.xlsx**, select the Attribute Groups sheet and get acquainted with the format.

	Attribute Group ID	Attribute Group Name	Sort Order	
2	3	Memory	2	
3	4	Technical	1	
4	5	Motherboard	3	
5	6	Processor	4	
6				

Above is a screenshot of the attribute fields. We will now go in further detail through each one:

Attribute Group ID – The database ID of your attribute group. You may leave this field blank, in which case ExcelPort will create a new attribute group with an automatically assigned Attribute Group ID.

Attribute Group Name – This is the name of your attribute group. Please note that this field should not be left blank.

Sort Order – The sort order of your attribute group.

Exporting Attributes and Attribute Groups

The exporting process if very straight-forward. You simply need to go to the Export tab, select to export Attributes and Attribute Groups, select a language and you're good to go.

Importing Attributes and Attribute Groups

When you import your attributes and attribute groups, you are able to choose an option, which will fine-tune the importing process:

Delete the entries before doing the import? – This will delete all of your attributes and attribute groups before the import begins. Please note that it is a good idea to have a backup of your system in case unexpected fields are encountered by the importer.

It is important to note that when you import your attributes and attribute groups, a set of criteria needs to be met:

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1) The imported file needs to be in an .XLSX format (or a .ZIP format, containing .XLSX files)
2) The first sheet needs to be called **Attributes** and the second sheet needs to be called **Attribute Groups**.
3) The data needs to be structured like in the exported file.
4) The attributes and attribute groups need to be placed one after the other with no empty spaces between them.
5) The **Attribute Name** and **Attribute Group Name** fields must always contain a value
6) The fields **Attributes** should always have a value for the **Attribute Group** field.
7) Make sure that your imported fields follow the guidelines, explained in this chapter.

Chapter 08: Customers

ExcelPort features Customers import and export. In this chapter we will examine this feature in detail.

Customers Fields

You may open your example file **Example_Customers.xlsx**, select the Customers sheet and get acquainted with the format.

Customer ID	First Name	Last Name	E-Mail	Telephone	Fax	Password	Salt	Newsletter	Status	Approved	Customer Group	Default Address	Cart	Wishlist	History	Transactions	Reward Points	IP Addresses
3	Jack	Smith	email@eg-dom	339005588	875577	12bf9604874e	a0c18dfeb	Disabled	Enabled	Enabled	Default	6	a:0:{}		[]	[]	[]	[{"customer_ip_

Above is a screenshot of the customer fields. We will now go in further detail through each one:

Customer ID – The database ID of your customer. You should not leave this field blank, since it will be needed to assign your customer to the customer address.

First Name – This is the first name of your customer.

Last Name – This is the last name of your customer.

E-Mail – This is the e-mail of your customer. Please note that this field should not be left blank.

Telephone – This is the telephone number of your customer.

Fax – This is the fax number of your customer.

Password – This is the encrypted password of your customer the way it is stored in the database. If you modify this field, your customer will not be able to use their password.

Note that OpenCart has changed the encryption of the passwords after version 1.5.4.1. This means that if you port customers between versions **1.5.1.3 – 1.5.3.1** and **1.5.4.1 – 1.5.6.x** then the passwords will not work and the customers will need to use the "Forgotten password" feature.

Salt – The Salt value for your customer passwords. This field is available since OpenCart 1.5.4.1. Note that if you edit it, your customer will not be able to use their password.

Newsletter - Enabled/Disabled, this is the newsletter status of your customer.

Status - Enabled/Disabled, this is the status of your customer.

Approved - Enabled/Disabled, this is the approval status of your customer.

Customer Group – This is the customer group of your customer. Valid customer groups are displayed in the **Meta** sheet.

Default Address – This is the ID of the default address of your customer. It should correspond to an Address ID from the field Addresses, which is described below.

Cart – This is the session cart data of your customer. The field is a serialized PHP array and it is in the form in which it is stored in your database. Be careful if you modify it.

Wishlist – This is the session wishlist data of your customer. The field is a serialized PHP array and it is in the form in which it is stored in your database. Be careful if you modify it.

Address – This is a JSON array, containing the addresses of your customer.

History – This is a JSON array, containing the histories of your customer.

Transactions – This is a JSON array, containing the transactions of your customer.

Reward Points – This is a JSON array, containing the reward points of your customer.

IP Addresses – This is a JSON array, containing the IP addresses of your customer.

The **Example_Customers.xlsx** file contains an Addresses sheet which contains the customer addresses. We will examine the fields in this sheet:

Customer ID	Address ID	Address First Name	Address Last Name	Address Company	Address Company ID	Address Tax ID	Address 1	Address 2	Address City	Address Postcode	Address Country	Address Zone
3	6	Jack	Smith	iSenseLab	8890iSENSE		Address 1	Address 2	Testville	1009332	Bulgaria	Sofia - town

Customer ID – The database ID of your customer. You should not leave this field blank, since it will be needed to assign your customer to the customer address.

Address ID – The database ID of your address ID. You may leave this field blank, in which case ExcelPort will create a new address with an automatically assigned Address ID.

Address First Name – The address first name of your customer.

Address Last Name – The address last name of your customer.

Address Company – The address company of your customer.

Address Company ID – Address company ID.

Address Tax ID – Address Tax ID.

Address 1 – Address 1 field.

Address 2 – Address 2 field.

Address City – Address city.

Address Postcode – Address postcode.

Address Country – Address country. Must correspond to the country names in your OpenCart system.

Address Zone – Address zone. Must correspond to the zone names in your OpenCart sysmem.

Exporting Customers

The exporting process if very straight-forward. You simply need to go to the Export tab, select to export Customers, select a store and language and you're good to go.

Importing Customers

When you import your customers, you are able to choose an option, which will fine-tune the importing process:

Delete the entries before doing the import? – This will delete all of your customers before the import begins. Please note that it is a good idea to have a backup of your system in case unexpected fields are encountered by the importer.

It is important to note that when you import your customers, a set of criteria needs to be met:

1) The imported file needs to be in an .XLSX format (or a .ZIP format, containing .XLSX files)
2) The first sheet needs to be called **Customers**
3) The second sheet needs to be called **Addresses**
4) The data needs to be structured like in the exported file.
5) The customers and addresses need to be placed one after the other with no empty spaces between them.
6) The **E-Mail** field in the Customers sheet must always contain a value
7) The **Customer ID** fields in both sheets must always contain a value
8) The **Address ID** field in the Addresses sheet must always contain a value
9) Make sure that your imported fields follow the guidelines, explained in this chapter.

Chapter 09: Customer Groups

ExcelPort features Customer Groups import and export. In this chapter we will examine this feature in detail.

Customer Groups Fields

You may open your example file **Example_CustomerGroups.xlsx**, select the CustomerGroups sheet and get acquainted with the format.

Customer Group ID	Customer Group Name	Description	Approve New Customers	Display Company No.	Company No. Required	Display Tax ID	Tax ID Required	Sort Order
1	Default	Test	Disabled	Enabled	Disabled	Disabled	Enabled	1

Above is a screenshot of the customer group fields. We will now go in further detail through each one:

Customer Group ID – The database ID of your customer group. You may leave this field blank, in which case ExcelPort will create a new customer group with an automatically assigned Customer Group ID.

Customer Group Name – This is the name of your customer group.

Description – This is the description of your customer group.

Approve New Customers - Enabled/Disabled, this is the approve new customers status of your customer group.

Display Company No. - Enabled/Disabled, this is the display company number status of your customer group.

Company No. Required - Enabled/Disabled, this is the company number required status of your customer group.

Display Tax ID – Enabled/Disabled, this is the display tax id status of your customer group.

Tax ID Required – Enabled/Disabled, this is the tax id required status of your customer group.

Sort Order – This is the sort order of your customer group. Note that this should be an integer.

iSenseLabs

Exporting Customer Groups

The exporting process if very straight-forward. You simply need to go to the Export tab, select to export Customer Groups, select a language and you're good to go.

Importing Customer Groups

When you import your customer groups, you are able to choose an option, which will fine-tune the importing process:

Delete the entries before doing the import? – This will delete all of your customer groups before the import begins. Please note that it is a good idea to have a backup of your system in case unexpected fields are encountered by the importer.

It is important to note that when you import your customer groups, a set of criteria needs to be met:

1) The imported file needs to be in an .XLSX format (or a .ZIP format, containing .XLSX files)
2) The first sheet needs to be called **CustomerGroups**
3) The data needs to be structured like in the exported file.
4) The customers need to be placed one after the other with no empty spaces between them.
5) The **Customer Group Name** field must always contain a value
6) Make sure that your imported fields follow the guidelines, explained in this chapter.

Chapter 10: Orders

ExcelPort features Orders import and export. In this chapter we will examine this feature in detail.

Orders Fields

You may open your example file **Example_Orders.xlsx**, click through the different sheets and get acquainted with the format.

We will now go in further detail through some of the fields and mention useful tips for each one.

Orders Sheet

Order ID – The database ID of your order. You may leave this field blank, in which case ExcelPort will create a new order with an automatically assigned Order ID.

Store ID – This is the database ID of the store where the order is placed. If the order is from the default OpenCart store, then this field should say "0". A full list of Store ID's can be found in the Meta sheet of the exported file. **This field must not be left blank.**

Customer ID – This is the database Customer ID of your customer. If this field has a value of 0, then the customer will be regarded as guest.

Reward – This field is used if you are running OpenCart 1.5.1.3. It stores the Order reward.

If you are running OpenCart 1.5.1.3 the following fields will be omitted, since they are not supported by this version of OpenCart: **Shipping Code, Payment Code, Forwarded IP, User Agent, Accept Language, Payment Company ID, Payment Tax ID**

If you are running OpenCart 1.5.2.x the following fields will be omitted, since they are not supported by this version of OpenCart: **Payment Company ID, Payment Tax ID**

Products Sheet

Order Product ID – The database ID of your order product. You may leave this field blank, in which case ExcelPort will create a new order product with an automatically assigned Order Product ID.

Order ID – The Order ID to which this order product is associated. Make sure that you have inserted a valid Order ID in order for ExcelPort to properly map the order product.

Product ID – The database ID of the product. Make sure that this is a valid Product ID.

Options Sheet

Order Option ID – The database ID of your order option. You may leave this field blank, in which case ExcelPort will create a new order option with an automatically assigned Order Option ID.

Order ID – The Order ID to which this order option is associated. Make sure that you have inserted a valid Order ID in order for ExcelPort to properly map the order option.

Order Product ID – The database ID of the order product. Make sure that this is a valid Order Product ID so that ExcelPort can map it to the order products. A list of valid ID's can be found in the Products sheet in the Order Product ID column.

Product Option ID – The database ID of the product option. Make sure that this is mapped to an existing product option ID.

Product Option Value ID – The database ID of the product option value. Make sure that this is mapped to an existing product option value ID.

Downloads Sheet

Order Download ID – The database ID of your order download. You may leave this field blank, in which case ExcelPort will create a new order download with an automatically assigned Order Download ID.

Order ID – The Order ID to which this order download is associated. Make sure that you have inserted a valid Order ID in order for ExcelPort to properly map the order download.

Order Product ID – The database ID of the order product. Make sure that this is a valid Order Product ID so that ExcelPort can map it to the order products. A list of valid ID's can be found in the Products sheet in the Order Product ID column.

Totals Sheet

Order Total ID – The database ID of your order total. You may leave this field blank, in which case ExcelPort will create a new order total with an automatically assigned Order Total ID.

Order ID – The Order ID to which this order total is associated. Make sure that you have inserted a valid Order ID in order for ExcelPort to properly map the order total.

Histories Sheet

Order History ID – The database ID of your order history. You may leave this field blank, in which case ExcelPort will create a new order history with an automatically assigned Order History ID.

Order ID – The Order ID to which this order history is associated. Make sure that you have inserted a valid Order ID in order for ExcelPort to properly map the order history.

Vouchers Sheet

Order Voucher ID – The database ID of your order voucher. You may leave this field blank, in which case ExcelPort will create a new order voucher with an automatically assigned Order Voucher ID.

Order ID – The Order ID to which this order voucher is associated. Make sure that you have inserted a valid Order ID in order for ExcelPort to properly map the order voucher.

Voucher ID – The Voucher ID to which this order voucher is associated. Make sure that you have inserted a valid Voucher ID in order for ExcelPort to properly map the order voucher.

Voucher Theme ID – The Voucher Theme ID to which this order voucher is associated. Make sure that you have inserted a valid Voucher Theme ID in order for ExcelPort to properly map the order voucher.

Exporting Orders

The exporting process if very straight-forward. You simply need to go to the Export tab, select to export Orders and you're good to go.

Importing Orders

When you import your orders, you are able to choose an option, which will fine-tune the importing process:

Delete the entries before doing the import? – This will delete all of your orders before the import begins. Please note that it is a good idea to have a backup of your system in case unexpected fields are encountered by the importer.

It is important to note that when you import your orders, a set of criteria needs to be met:

1) The imported file needs to be in an .XLSX format (or a .ZIP format, containing .XLSX files)
2) The sheets need to have the following names: **Orders, Products, Options, Downloads, Totals, Histories, Vouchers**
3) The data needs to be structured like in the exported file.
4) The orders need to be placed one after the other with no empty spaces between them.
5) The Orders **Store ID** field must **always** contain a value
6) Make sure that your imported fields follow the guidelines, explained in this chapter.

Final Words

Thank you for your interest in ExcelPort. If you experience any difficulties, feel free to open a ticket in http://isenselabs.com/users/support. We will gladly assist as soon as possible.