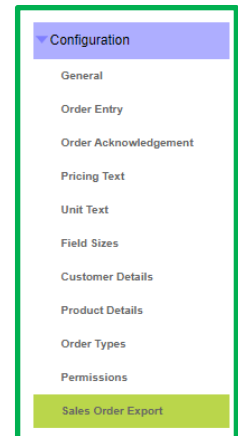


Blue Alligator Cloud - Sales Order Export Configuration

Supplying a PDF acknowledgement of Sales Order/Quote/Invoice/Credit Note, may be sufficient for most customers, however, new functionality added to SalesPresenter from version 1.9.3 onwards allows a link to be included in the order acknowledgement email which allows the recipient to download a CSV version of the order if configured. This document will detail the one-off setup instructions to put this in place with the fields you choose to be output for your customers.

1. Configuring the Sales Order Export file

In the **Configuration > Sales Order Export** section of your Blue Alligator Cloud Account, you can configure which fields are to be output to the CSV file that the recipients of the order acknowledgement email will have access to. A list of possible **Exportable Fields** will be shown on the left-hand side and the current **Sales Order Export Fields** on the right. Upon first access to this option, the right-hand side will be blank due to the file not being configured yet. By selecting a field from the **Exportable Fields** column, and clicking the “**add fields >>**” button, the field will move to the **Sales Order Export Fields** column.



Configuration - Sales Order Export Configuration

Configuration

Number of days the export link is active for save

Exportable Fields		Sales Order Export Fields
<ul style="list-style-type: none"> header_OrderNumber header_OrderType header_OrderDate header_CustomerRef header_CurrencyCode header_LineCount header_SpecialInstructions header_NettOrderValue header_SalesTaxOrderValue header_ShippingNettValue header_ShippingSalesTaxValue line_ProductCode line_Description line_LineNumber line_MasterLineNumber line_TotalPieceQty line_QtyPerCarton line_QtyPerInner line_QtyPerPack line_DueDate line_SpecialInstructions line_NettSellPrice line_NettLineValue line_SalesTaxLineValue line_SalesTaxRate line_Barcode line_CartonBarcode line_InnerBarcode line_PackBarcode 	<div style="border: 1px solid #ccc; padding: 5px; width: 100px; margin: 5px auto;">add fields >></div> <div style="border: 1px solid #ccc; padding: 5px; width: 100px; margin: 5px auto;"><< remove fields</div>	<div style="text-align: right; margin-bottom: 5px;"> ^ </div> <div style="text-align: right;"> v </div>

change names
save fields

The sequence of the fields can be configured through the use of the “**^**” and “**v**” arrowed buttons on the right-hand side, simply by selecting the field and moving it up or down to the desired position.

By default, the pre-determined field names will be output to the Sales Order Export File (e.g. header_OrderNumber). However, you can customise the headings that are output to the CSV file by clicking the **change names** button in the bottom left-hand corner. Once pressed, a new page will appear listing all of the possible **Exportable Fields** and their current **Display Name**.

Name	Display Name
header_OrderNumber	Order Number
header_OrderType	Order Type
header_OrderDate	Order Date
header_CustomerRef	Alias if you want rename
header_CurrencyCode	Alias if you want rename
header_LineCount	Alias if you want rename
header_SpecialInstructions	Alias if you want rename
header_NettOrderValue	Alias if you want rename
header_SalesTaxOrderValue	Alias if you want rename
header_ShippingNettValue	Alias if you want rename
header_ShippingSalesTaxValue	Alias if you want rename
line_ProductCode	Product Code
line_Description	Alias if you want rename
line_LineNumber	Alias if you want rename

2. Including the Sales Order Export link within Email Order Acknowledgements

Now that the Sales Order Export file has been customised to your requirements, the link needs to be configured to be output to the order acknowledgements for SalesPresenter and CloudCart.

In the **Configuration > Order Types** section of your Blue Alligator Cloud Account, you'll find the option to configure the text that appears in the body of the emails that are sent from SalesPresenter and CloudCart (shown in the following screenshot). To embed the newly set-up Sales Order Export link, a special code must be included within this configuration. By including the code **\$DATALINK\$**, the email will generate a Sales Order Export link that the end user can click in order to view the CSV version of that specific order (in the format previously customised in the steps above). Once this configuration has been amended, ensure that the **Update** button is pressed at the bottom of the page to save your changes.

The default subject line to use when sending order acknowledgements via email. There are some special codes that you can embed into the subject. These codes will automatically be replaced with data (such as the order number) when you're drafting the email (see the table at the bottom of this page).

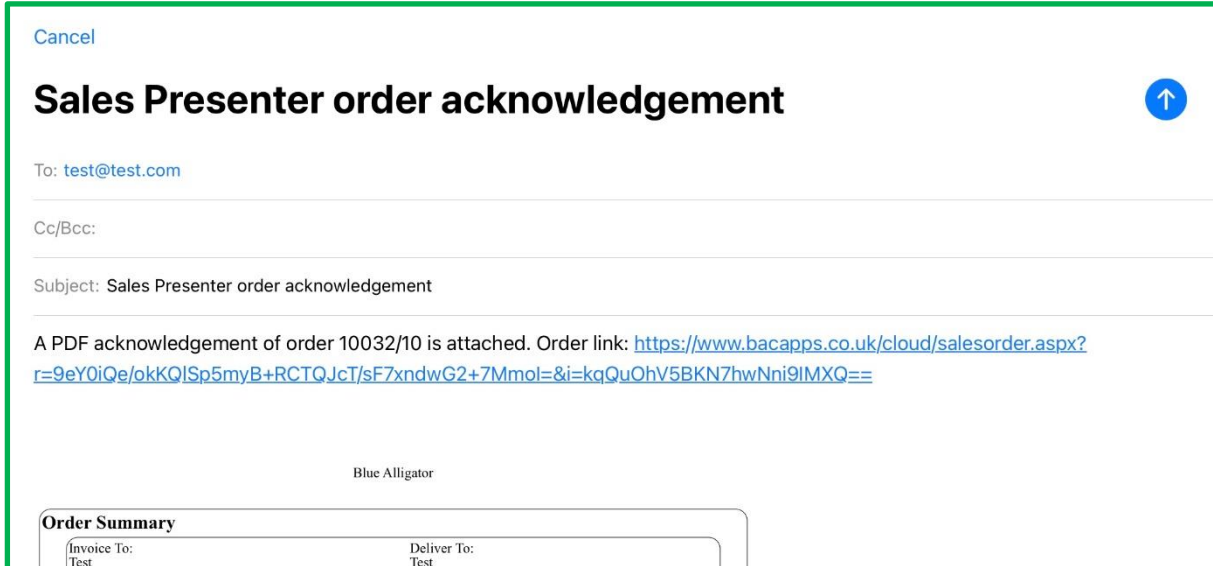
The default body text to use when sending order acknowledgements via email. There are some special codes that you can embed into the text. These codes will automatically be replaced with data (such as the order number) when you're drafting the email (see the table at the bottom of this page).

You can optionally attach up to three additional PDF files to any order acknowledgement email sent via SalesPresenter. For example, you may wish to attach your Terms and Conditions of Sale to each email.

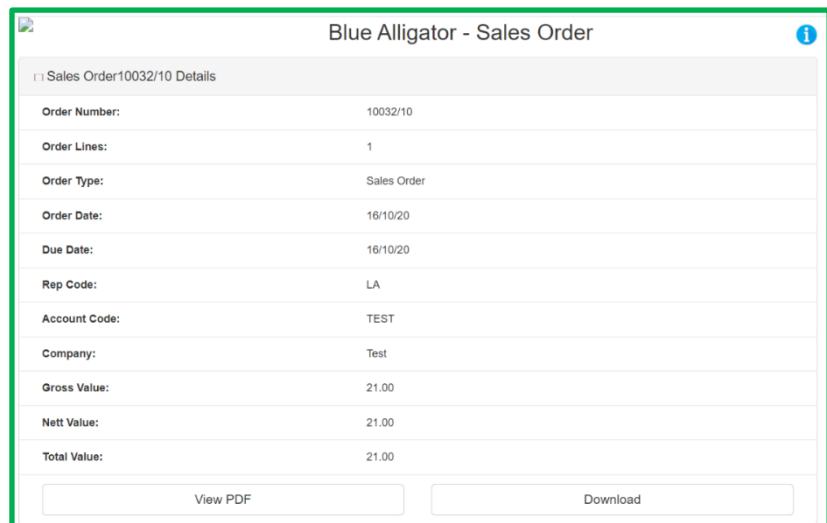
Specify the names of the PDF files that you have uploaded to your cloud account. Do not include the file extension (e.g. if you uploaded the image file **TermsAndConditions.pdf** then simply specify **TermsAndConditions** here).

Viewing the Sales Order Export link

Now that the Sales Order Export link has been implemented using the steps above, any new order acknowledgements sent from SalesPresenter or CloudCart will contain a URL to allow the recipient to access the CSV version of the order. Please note that after the initial setup that your SalesPresenter will have needed to have performed a **Download from Cloud** in order for the configurations you've set up to take effect. As specified earlier, this is also on available for devices running SalesPresenter version 1.9.3 onwards.



Please Note: Although the link will successfully generate, the order details, including the CSV version of it, will not be available on the link until the SalesPresenter user has uploaded the order to the cloud.



Following the link will take the recipient to a web page specific to that order, containing the header details, the PDF order acknowledgement as well as the CSV version of order which is accessible via the **Download** button.

	A	B	C	D	E	F	G	H
1	Order Number	Order Type	Special Instructions	Product Code	Description	Total Piece Qty	Barcode	
2	10032/10	O	This is a test order	A00001	Melamine Bowl	3	501638346293	
3								
4								