

# B2B Cart import

Last Modified on 03/01/2022 11:03 am EST

## Overview:

Contacts may import their Items and Quantities into their respective carts in the B2B portal. This essentially is allowing your customers to quickly place orders into Order Time.

## How To:

First, go to the import area in Order Time and create and save an import mapping.

The screenshot shows the top navigation bar with icons for Purchasing, Production, Repairs, Warehouse, and Reports. Below the navigation bar, the breadcrumb trail reads "Admin > Import > Import". The main heading is "Import". The form contains a "Type" dropdown menu set to "Cart Item" and a "CSV File" field with a "Choose File" button and the filename "B2B cart import.csv". A green "Upload" button is positioned below the file field.

This screenshot shows the "Import" configuration screen. The breadcrumb trail is "Admin > Import > Import". A "Save Mapping" button is visible in the top right. The "File Columns" and "System Columns" are listed in a table:

File Columns	System Columns
Cart ID	Cart Id
Item	Item
Line Instructions	Line Instructions
Quantity	Quantity

Below the table are "Start Import" and "Delete" buttons. A "Save Mapping" dialog box is open, showing the name "B2B Import" in a text field and "Save" and "Cancel" buttons at the bottom right.

You Customer MUST have the Cart ID on the CSV. You may find the Cart ID by going to Open Full List > Carts.

Then head to your B2B configuration. You should see it assigned here.

The screenshot shows a B2B configuration interface with several sections:

- Preferences:** Includes checkboxes for 'Allow customer to edit payment method', 'Allow customer to create sales orders', and 'Allow a customer to pay for past invoices through the portal'. A dropdown for 'Initial order status' is set to 'Processing'.
- Form Templates:** 'Sales Orders' is set to 'Sales Order' and 'Ship Doc/Invoice' is set to 'Ship Doc'.
- Shipping Address:** 'Use Customer Shipping Address' is selected. Other options include 'Allow customer to edit addresses', 'Allow user to add a new ship address', and 'Customer Enters Shipping Address per Order'.
- Email Template:** 'Send mail after order is confirmed' is unchecked. 'Email Template' is set to 'Generic Email'. A red box highlights the 'Bulk Order Import' section, which includes 'Easy Sales Order Mapping' and 'Cart Item Mapping' (set to 'Cart Item Import').
- Columns:** A table with 'Available columns' (Account #, Additional Fee, Additional Fee Rate) and 'Selected columns' (No.).
- Shipping Options:** 'Ship Methods' is selected. A search bar shows 'UPS', 'US Mail', and 'Federal Express'.

Then when your customer logs in they would be able to import the Items into their cart.

The screenshot shows a customer's shopping cart page for 'Zombie8RUS'. The page includes a navigation bar with 'PRODUCTS', 'ACCOUNT', and 'CONTACT US'. The cart area has buttons for 'View Cart Items', 'Check Out', and 'Import Items' (highlighted with a red box). Below the buttons is a table with the following data:

IMAGE	PRODUCT	DESCRIPTION	PRICE	UOM	QUANTITY	EXT	Line Instructions
	Blue Jay - Cat Toy		0.68	EA	1	0.68	

Cart Total: 0.68

Below the cart, there is a search bar, a user profile 'keri levine', and a shopping cart icon showing '1 Item(s) 0.68'. At the bottom, there is an 'Import Items' section with a 'Choose File' button (showing 'No file chosen'), a 'View Sample CSV Template' button, and a 'Submit' button.

