Customer portal: How to create orders in bulk from an Excel or CSV file

Portal users upload a CSV, XLS or XLSX file to create many orders at once. This article covers setup, upload, status follow-up and fixing failed orders in Order imports.

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Introduction

Portal users can upload one CSV, XLS or XLSX file to create many orders at once. This replaces entering orders one by one with a form or template. Every order in the file becomes its own order import. Valid orders are created or wait for approval. Failed orders stay in Error with a short reason.

Prerequisites

- A **Super Admin** must switch on **Customer portal order creation via order import** for the customer portal and choose a **File upload format** (see 'Set the file upload format for the customer portal' below). Without a format, no portal user sees the **Upload file** button.

  > The chosen format must be a manual order import source with an active CSV or Excel mapping that is not limited to specific customers. For a custom mapping, contact the **Account Manager**.

- The customer portal must already create orders through the order import flow. See Customer portal - Creating and planning orders shown in customer portal views. for setup.
- Portal users must be able to create orders. If the tenant forces template-only ordering, or the customer status is not Approved, **the button is visible but disabled.**

Use cases

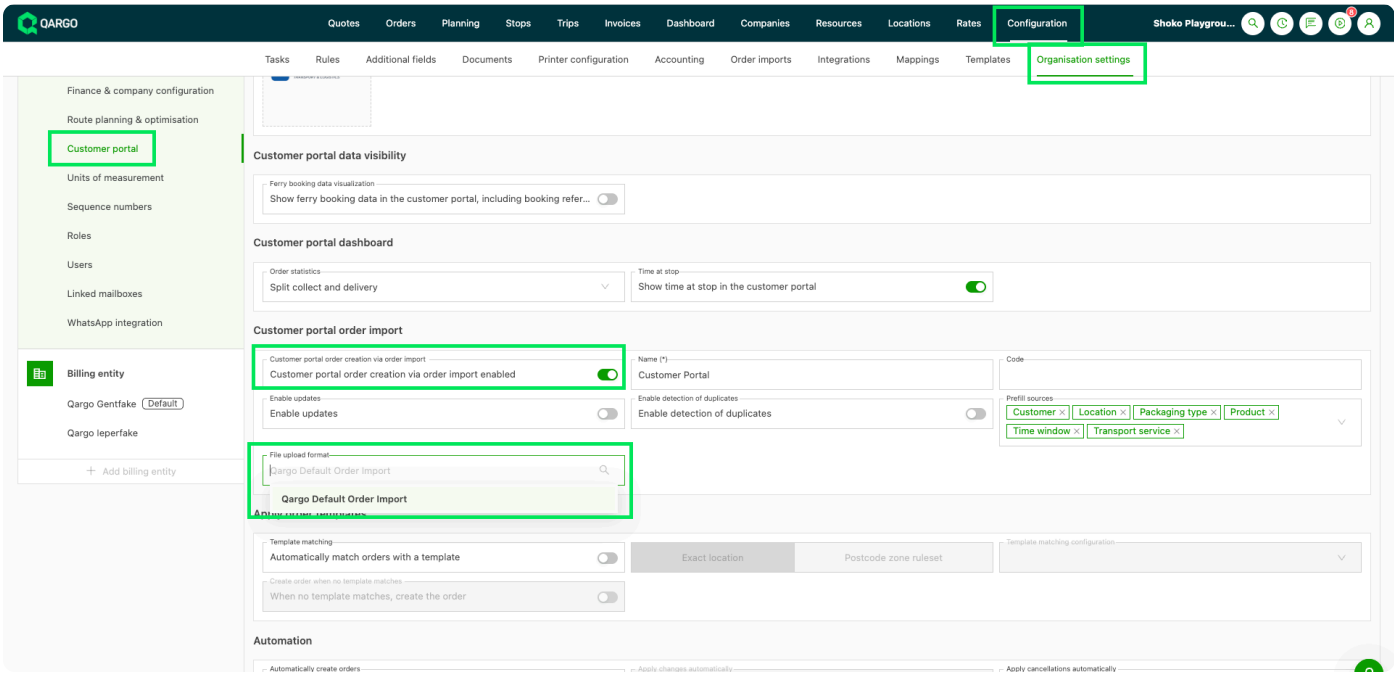
- A shipper books dozens of orders a day from a spreadsheet and uploads the file directly, instead of sending it to the transport company to be re-keyed.
- A transport company asks all portal customers to send orders in one agreed file layout, and the orders arrive without manual entry.
- A shipper uploads a file where a few rows contain typos. The shipper sees the reason for each failed row and corrects the file without waiting for the transport company.

Set the file upload format for the customer portal

🎥 This video explains how to configure the settings for the file upload format, and how this works for customers on the portal:

▶ https://watchclueso.com/embed/zcc42n2e5azjbkqg

1. Navigate to **Configuration > Organization settings**.
2. Open **Customer portal** in the left side menu.
3. Enable **Customer portal order creation via order import**.
4. Select the import source in the **File upload format** field. Only manual sources with an active CSV or Excel mapping that are not limited to specific customers are listed.
5. **Save** the settings.

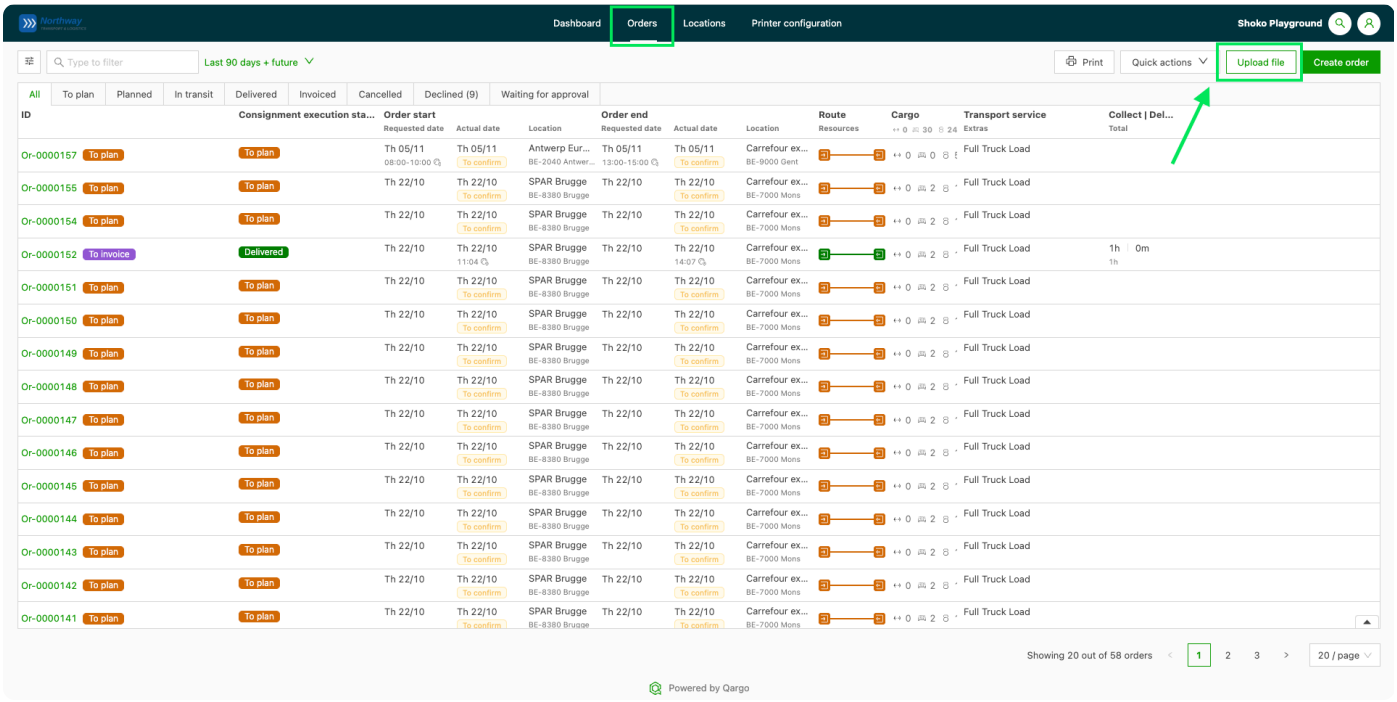


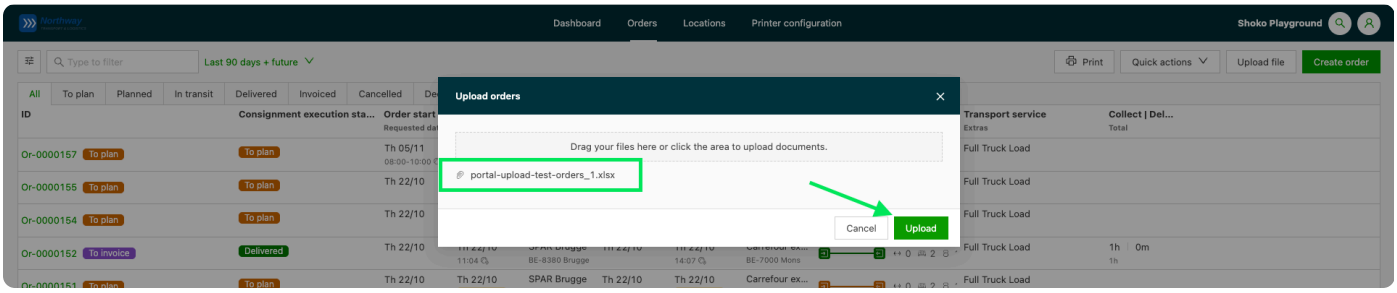
The **Upload file** button now appears for every customer with portal access.

> ‼️ One upload format applies to the whole tenant. Every portal customer uploads the same file layout. Clearing the File upload format field hides the button for all customers.

Upload a file of orders on the customer portal

1. Open **Orders** on the customer portal account.
2. Click **Upload file**, next to Create order.
3. Drop a file in the Upload orders dialog, or browse to select it.
4. Click **Upload** to submit the file.



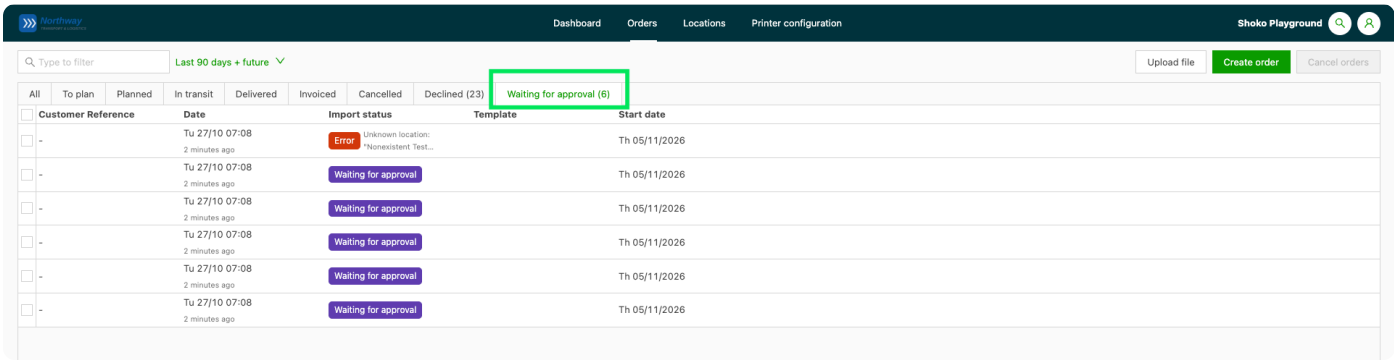


Every order in the file becomes its own order import. Each order is booked on the portal user's own company, whichever customer the file names.

📚 Only CSV, XLS or XLSX files are accepted. Word, PDF and free-format documents go through document scanning instead.

Follow the status of uploaded orders

1. Open **Orders** on the customer portal account.
2. Select the **Waiting for approval** tab.
3. Locate the uploaded orders and read their status.
4. Read the reason shown next to any order with status **Error**, such as an unknown location or an unknown value. When several reasons apply, the row shows the first one with a count. Hovering over it shows all of them.

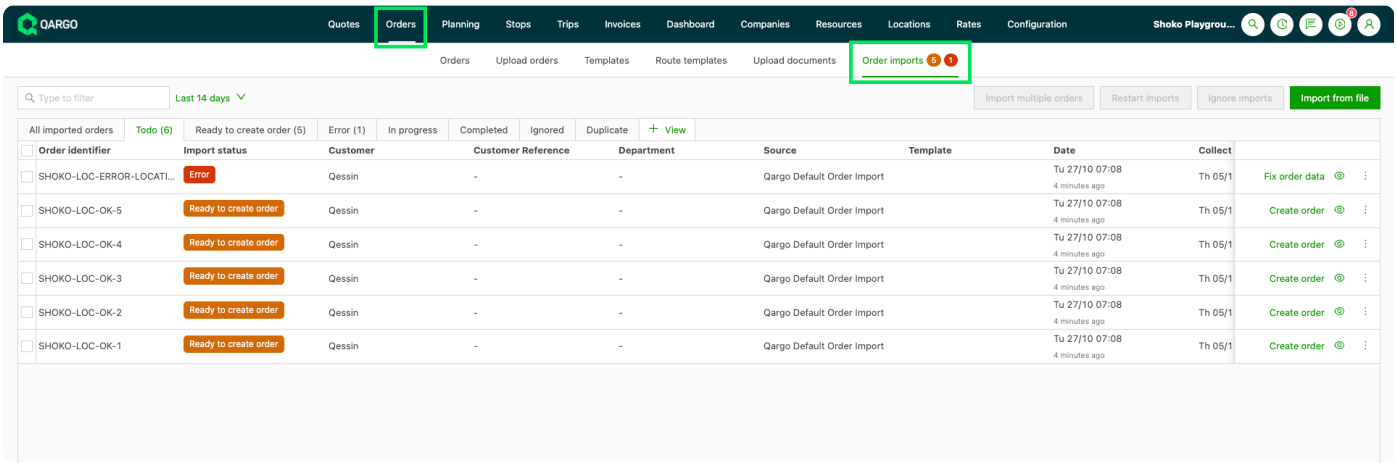


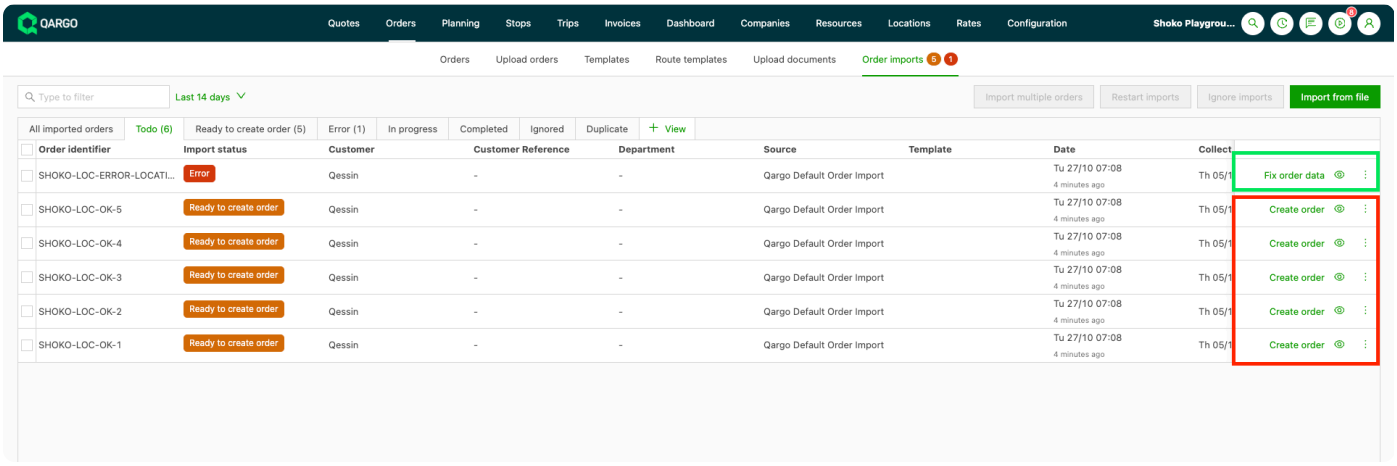
Valid rows are created as orders, or wait for approval, depending on the automation setting of the upload format. Failed rows stay in Error with a plain, read-only reason.

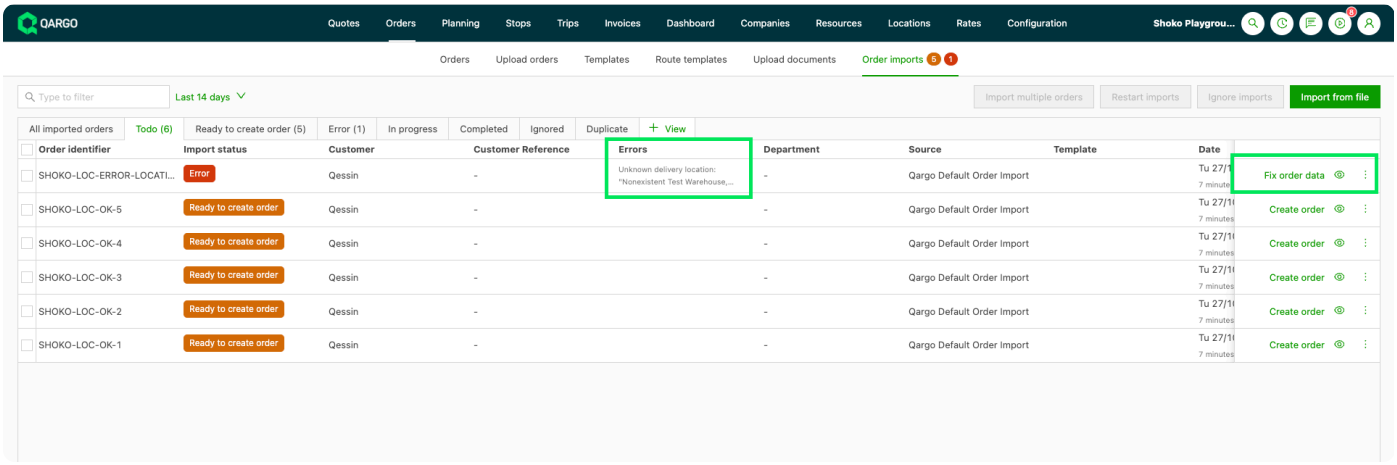
📚 Portal users cannot correct a failed order on the portal. The file is fixed and uploaded again, or the transport company fixes the order in **Order imports**.

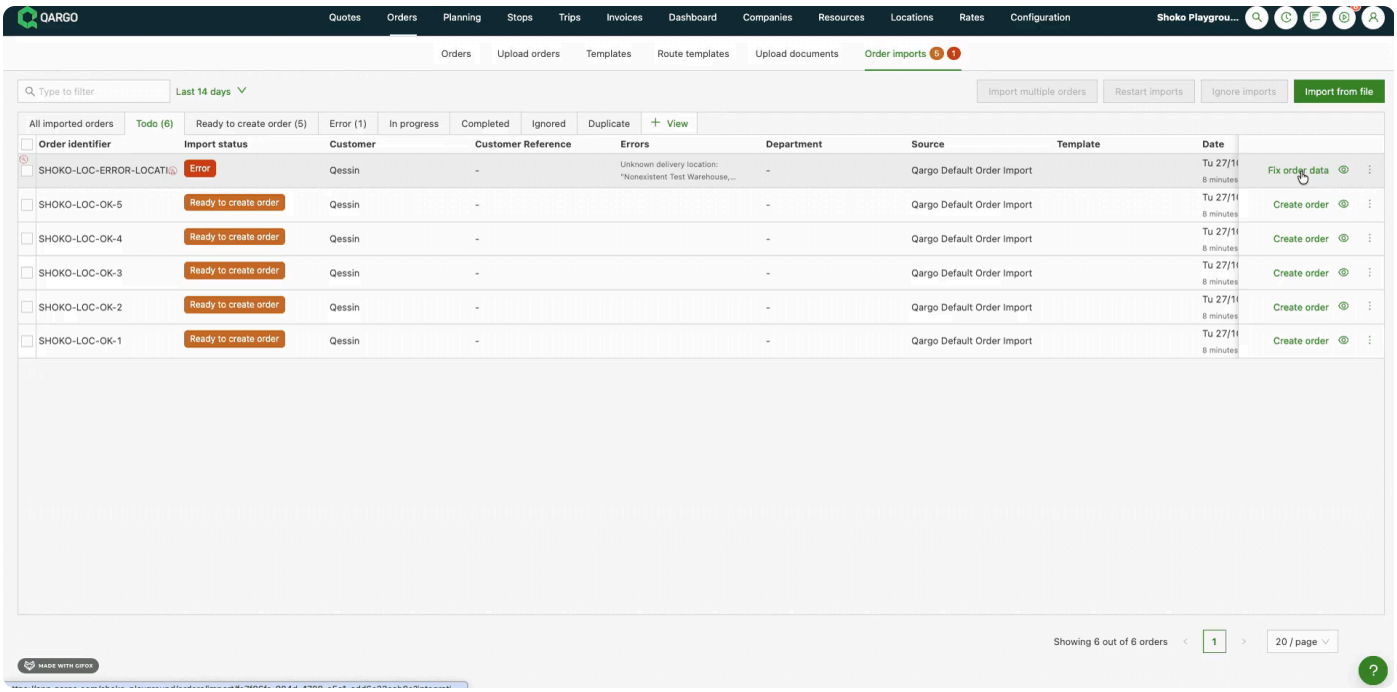
Create and fix uploaded orders as a tenant user

1. Navigate to **Orders > Order imports**.
2. Locate the uploaded rows. The upload format shows in the Source column and the portal customer in the Customer column.
3. Click **Create order** on a row that is ready.
4. Click **Fix order data** on a row in **Error** and correct the issue, for example the location.
5. **Save** the order.









The order is created, and the row no longer shows Error on the portal.

📚 Order capture validation does not block an uploaded order. A broken rule shows in the order verification issues popup when Create order is clicked, and the order still goes through.

Troubleshooting

Issue	Resolution
The Upload file button is not visible on the portal	No File upload format is set, or Customer portal order creation via order import is off. A Super Admin must set both in Organization settings under Customer portal.
The Upload file button is visible but disabled	The button stays visible but disabled, with a tooltip, when the tenant forces template-only portal ordering or the customer status is not Approved.
A file fails with “Something went wrong, try submitting again”	The file type does not match the mapping of the upload format. Use a file of the same type as the template of the format. A PDF or Word file gives the same message.
A row names a different customer than the portal user’s company	This is expected. Every uploaded order is booked on the portal user’s own company.
One row failed but the other rows were created	This is expected. Each order is processed on its own, so one failed row never blocks the rest of the file.
A row with a missing value was not marked as Error	The value may have been filled from the customer default. Check the row in Order imports before creating the order.
An order that breaks an order capture validation rule was still created	The tenant sees the Order verification issues popup when creating the order from Order imports.