Video - How to create orders in bulk via the customer portal?

Portal users can upload one CSV, XLS or XLSX file on the customer portal Orders list. Every row becomes its own order import.

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🎥 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

📚 If the Upload file button is grayed out, template-only ordering is forced, or order creation is blocked for that customer. Hovering over it shows the reason in a tooltip.

‼️ Word and PDF files still go through document scanning.

For more on bulk order creation via Excel/CSV upload, see: **CUSTOMER PORTAL - How to create orders in bulk from an Excel or CSV file**.

For order scanning, see this article: **Order scanning (QI)**.