

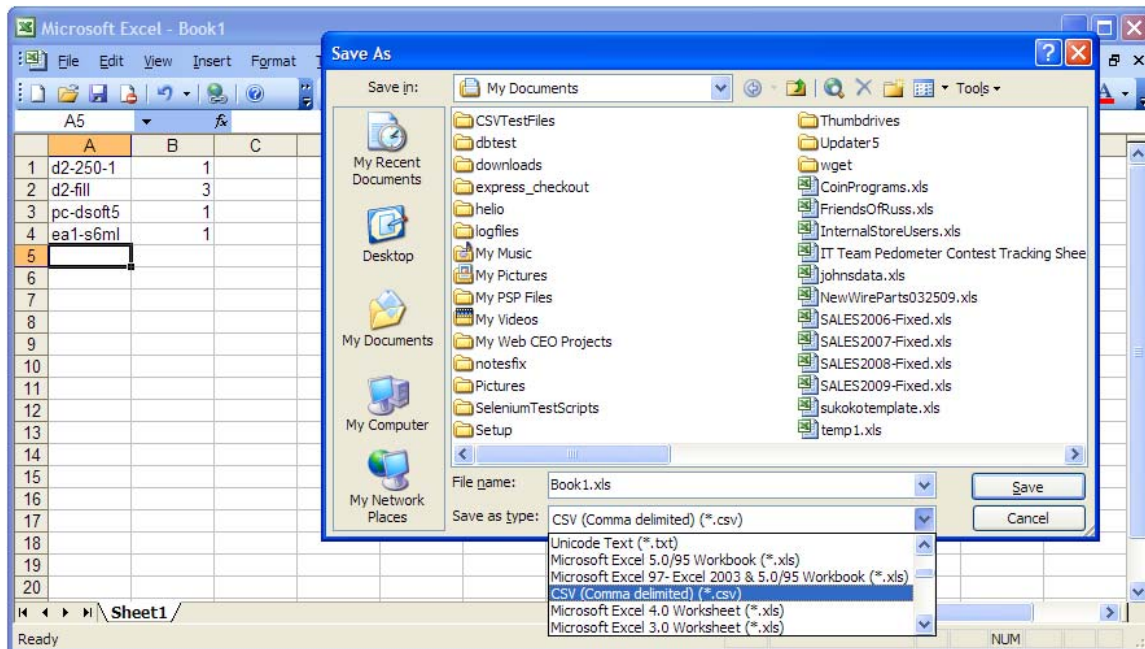
# AutomationDirect.com Order Import Feature

This document describes the requirements to upload a CSV or XML format order file from your system into our AutomationDirect.com E-commerce system to create an order. This requires that you can create the necessary tools within your business model to create a CSV or XML file that matches our defined format.

## CSV Order Upload

The CSV, or Comma Separated Values, option is only for quickly adding items to your cart. It does not have the capability to specify checkout information like the XML option does.

The CSV file is a simple text file listing item and quantity pairs separated by commas or carriage returns. The easiest way to generate a CSV file is to use Microsoft Excel to create a list. In Column A you will list the item codes that you wish to order and Column B lists the quantities. Once you have all of your items in the spreadsheet, choose to save the file and specify CSV in the “Save as type:” field. The resulting file should be ready for you to upload to the Automation Direct web site.



To upload the file, go to [www.automationdirect.com](http://www.automationdirect.com), login to your account, go to the **Quick Order** feature. In Quick Order the Order Upload feature is located on the right and below the Cart View. Enter the filepath and name of the CSV file and follow the prompts. Note, that our CSV file import feature provides an option to either add items to your existing cart or empty your existing cart before adding items. This option is selected on the Quick Order page.

Any errors in the file, either due to the format or invalid item codes, will be reported to you on the Quick Order page. If the file is uploaded without errors then you will be redirected to the cart page so that you can verify that your items were added correctly.

## XML Order Upload

XML Order Upload allows you to create a file that contains the items that you wish to order and the necessary information to complete your order. At a minimum, this will populate your cart with the items like the CSV file described above. The XML file allows you to also specify some or all of the information necessary to complete your order such as shipping address, contact information, shipping method, and payment information. If partial checkout information is included in the file you will be placed on the appropriate page in the AutomationDirect checkout process to complete the information. If all of the information is provided in the file you will be redirected to the final step of checkout to verify your information and submit your order.

After creating the XML file (as defined below) go to [www.automationdirect.com](http://www.automationdirect.com), login to your account, go to the [Quick Order](#) feature. In Quick Order the Order Upload feature is located on the right and below the Cart View. Enter the filepath and name of the XML file to be uploaded and follow the prompts.

We have defined an XML format in the form of an XML Schema file so you can create your order import file. The XML file format will be validated and you will either get an error report or if enough correct information was submitted the data will be uploaded. Note, that our XML file import feature provides an option to either add items to your existing cart or empty your existing cart before adding items. This option is selected on the Quick Order page. If there is valid data in the import but some information required to complete the order is not available, you will be placed in the appropriate store location to enter the missing data (Example, if you provide valid data for everything except the PO#, we will load the cart, select the shipment method, and stop on step 3, the payment

screen, of checkout where you can enter your PO# information). As a minimum, you must specify items and quantities to be loaded into your cart. Additionally, you can add as much of the checkout information as desired. If all of the required information is included in the file, upon successful upload you will be redirected to the Checkout Review and Submit page (Step 4) to confirm and complete your order. If there are errors in the uploaded XML an error page will be displayed listing the errors that must be corrected for the order to be successful.

## **XML/Schema File Requirements**

We make an assumption that you or your resources within your company are technically savvy on XML Schemas.

An XML Schema document is provided that specifies the fields in the XML file that you will need to create. The XML will have fields for all of the information necessary to identify you by customer number, populate the shopping cart, provide checkout information and validate the order. The minimum required fields are those necessary to identify you and populate the shopping cart. The rest of the fields to include checkout information are optional.

- Fields to identify the customer
  - User id – This is your customer number that can be found on any invoice, statement or packing slip from AutomationDirect. This is a unique identifier within our system. **Required**
  - Password – This is not required because at this time you have to be logged in to the store to access the Order Upload feature. To protect your password please do not use this field at this time.
  
- Fields to populate the cart
  - Item – the item code that identifies the part being ordered. **Required**
  - Quantity – the quantity of “item” being ordered. Make sure with items that are “sold in packs” you enter the number of packs, not individual pieces. **Required**
  
- Fields from Step 1 of Checkout
  - Ship to address
    - Company Name – Required if ship to address is specified
    - Country – Optional. Defaults to USA. Note: we only ship to USA or CA (Canada).
    - Attention – Optional
    - Address lines – First one is required. A second is optional. Note: we cannot ship to PO boxes.
    - City – Required
    - State – Use USPS recognized two character abbreviations. Required.
    - Zip Code – Required
    - Phone Number – Required

- Shipping Notes – This will print on your shipping label and are intended for your delivery department. These notes are not read or used to provide special handling by AutomationDirect’s shipping department. Optional
- Contact Info – Optional.
  - Attention – Required if contact info specified
  - Phone – Required if contact info specified
  - Email Address – Required if contact info specified.
- Fields from Step 2 of Checkout
  - How to handle shipping charges – Optional
    - Shipping Method – required if shipping charge option specified
    - Account Type – required if charge shipping to an existing UPS or FedEx account
    - Account Number – required if charge shipping to account
- Fields from Step 3 of Checkout
  - How to pay – Optional
    - PO Number – Required if specify to pay by PO. Optional otherwise.
    - Card Type – Required if specify to pay by credit card
    - Card Number - Required if specify to pay by credit
    - Expiration Date - Required if specify to pay by credit card
    - Card Holder Name - Required if specify to pay by credit card
    - Phone - Required if specify to pay by credit card or i-check
    - Name – Required if specify to pay by i-check
    - Address – Required if specify to pay by i-check
    - Check Number - Required if specify to pay by i-check
    - Memo – Optional
    - Bank Account Type - Required if specify to pay by i-check
    - Routing Number - Required if specify to pay by i-check
    - Bank Account Number - Required if specify to pay by i-check
    - Signature - Required if specify to pay by i-check

### **Parsing and Validation of the XML**

XML files are described very specifically in the XML Schema file and any file that does not meet the exact specifications will generate errors that will be displayed on the Quick Order page. You will need to correct these XML format errors. If you have software that you will use to generate an XML file it may take some time to get it set up correctly the first time and then should work properly for future imports.

The order portion is used to populate the cart. The customer can specify any number of order items in the XML file. The item code from each order item line is verified as an existing part in the store. Any invalid item will generate an error that will be displayed to you on the Quick Order page. The quantity is verified as a whole number greater than 0. The cart is populated with each valid item code and quantity. Any items in the cart prior to the upload will either remain in the cart or be removed depending on your selection

when you uploaded your file. If no more information is provided, and no errors were found, the customer is redirected to the shopping cart where the customer can view their order and continue manually. If there were errors they are displayed on the Quick Order page so that you can address them. If more information was provided then processing continues.

The information for step 1 of checkout can be provided in the ship-to-address, contact-info, and shipping-notes sections of the XML file. If the shipping address is an exact match to an existing address then it will be used as already in the system. Otherwise a new shipping address record will be created on the store. The new address will be validated as any other shipping address that is entered directly in the store. Instead of entering an address, the customer can specify the nickname of an existing address or specify default and the default shipping address will be used. The default billing address is always used when entering an order from XML and cannot be changed.

Contact info is required and has the same validation as if it was entered directly on the web site.

Shipping notes are optional. If they are provided they will be entered into the order, otherwise nothing will be put into the shipping notes. There is no additional validation applied to the shipping notes. Shipping notes will print on your shipping label and are intended for your delivery department. These notes are not read or used to provide special handling by AutomationDirect's shipping department

Any errors reading in the address or contact info will be displayed on the Quick Order page. If everything is correct and no further information was provided, the user is redirected to step 2 of checkout. Otherwise, import processing continues.

The shipping-info section handles step 2 of checkout where the customer can enter how shipping charges are handled and what method to use for shipping the order. Shipping options are specified as empty tags to enforce the allowed shipping methods and to allow the XML parser to check for invalid shipping methods. Validation checks to make sure that an otherwise valid shipping method is available for this order. Any errors are presented on the Quick Order page. If everything is correct the customer is redirected to step 3 unless payment info is included in the XML.

The payment-info section includes fields for entering purchase order, credit card, or electronic check information to pay for the order. The XML verifies the required fields. Additional validation is performed as if the customer entered the data on the web site. Errors are displayed on the Quick Order page. If all of the information is correct the customer is redirected to step 4 of checkout where they can review and submit the order.

If errors are generated through the processing of the XML, the errors are displayed on the Quick Order page. They can choose to cancel the order and leave the store to correct the XML file and try again later. Or they can choose take the order as it was processed and continue from the point where the error occurred. For example, if the order and shipping

address was processed with no errors and the first error occurred in the shipping-info section, the customer will be redirected to step 2 of checkout where they can fix the error and continue with the normal checkout procedure. Information that was included in the XML will be entered into the fields for the customer. In the case of this example, if the customer had payment info in the XML, it will already be entered for them when they reach step 3.