

eCrafty.com

A detailed guide to getting things done at eCrafty.

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Section One Overview

How to Generate the Invoices, Picklist, Address Tags, and Addresses for Dazzle

This section provides step-by-step instructions on how to do the common computer tasks required to prepare for picking and posting orders.

It is arranged in task order so that if you follow it from beginning to end you will have done everything needed to prepare for picking, packing, and posting orders.

How to Log in and Choose Orders

There are three tasks we do to fill web orders that require exporting information from ChannelAdvisor. The very first steps in this process are logging into ChannelAdvisor and deciding which orders you are going to work with and "selecting" them. This help describes how to do that.

Sign in to ChannelAdvisor

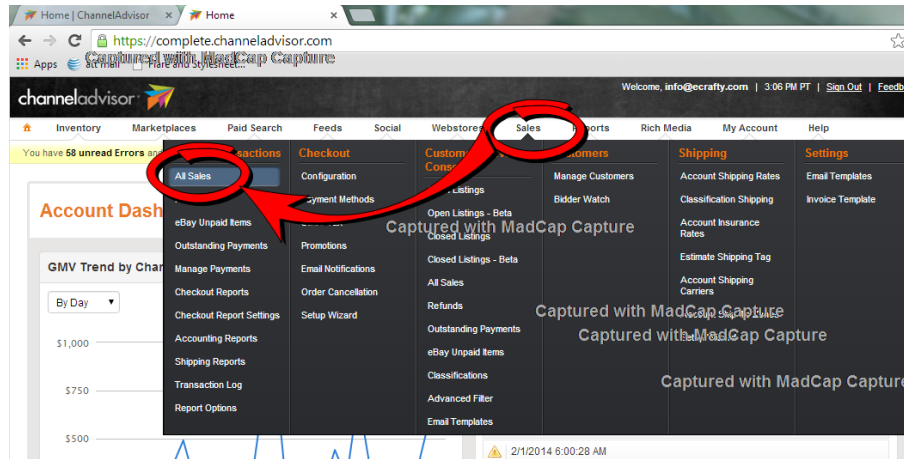
1. Sign in to channeladvisor at <https://login.channeladvisor.com/>

NOTE: The current user name and password are posted on the bulletin board.

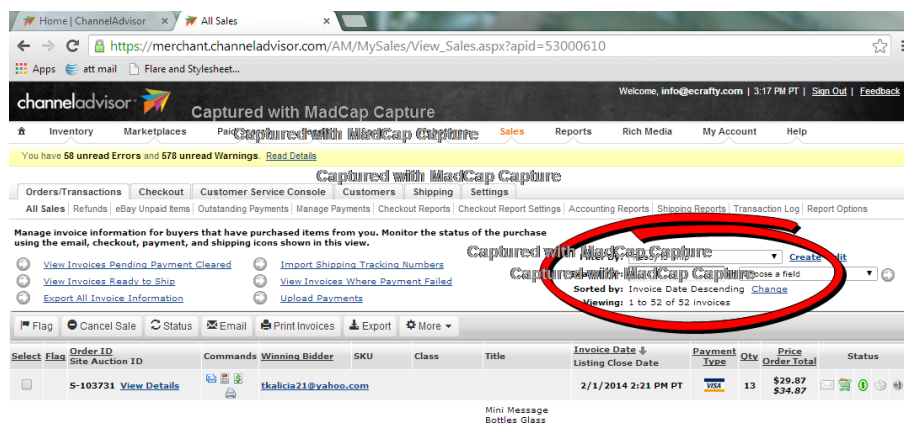
The screenshot shows the ChannelAdvisor login page. At the top, there is a navigation bar with the ChannelAdvisor logo and the text "be seen." Below this is the "CLIENT LOGIN" section. It contains a "Username:" field, a "Password:" field, and a "Log In" button. A link for "Forgot your password?" is also present. To the right of the login fields is a "How do I log in?" section with two bullet points: "eCrafty" and "Standard Marketplaces (Formerly MarketRock)". Below the login section are three promotional banners: "16 THINGS YOU WISH YOU'D KNOW When You Started Selling Online", "ChannelAdvisor's Best of Paid Search 2013", and "Catalyst 2014 E-commerce Accelerated".

Display the Current Orders in ChannelAdvisor

- Click on "Sales" (7th tab from the left on the top bar) and then click on "All Sales" from drop down menu.



- The "Filter By" field should be set for "Orders Ready to Ship" and the "Search For:" field should be blank.



Select the Appropriate Orders

4. Choose which orders are going to be filled and select those orders by clicking on the box to the left of the orders. The orders are listed in descending order from new to old.

NOTE: We never choose all the orders which is why you don't just click on select. There are always orders in the list that have some kind of issue holding them up. These will have a "flag" to the right of the selection box. As you click down the list selecting orders, when you get to the orders with flags, you can assume that you have selected all the orders that can actually be filled.

The screenshot shows the ChannelAdvisor 'View Sales' page. The table below is a representation of the data shown in the image:

Select	Flag	Cancel Sale	Status	Email	Print Invoices	Export	More
<input type="checkbox"/>							

The first row in the table is highlighted in blue, and a red arrow points to the 'Select' checkbox.

Choose Your Next Step

5. With the orders selected, you can either print invoices or click "Export" to create [address tags](#), the [picklist](#), or [addresses for Dazzle](#).

The screenshot shows the same ChannelAdvisor 'View Sales' page. A red circle highlights the 'Print Invoices' and 'Export' buttons in the top toolbar.

How to Print Invoices

The printed invoice serves as a packing list and is included in each order we ship. This help tells you how to print the invoices. You should already be logged in to ChannelAdvisor and have the appropriate orders selected.

Log in and Choose Orders

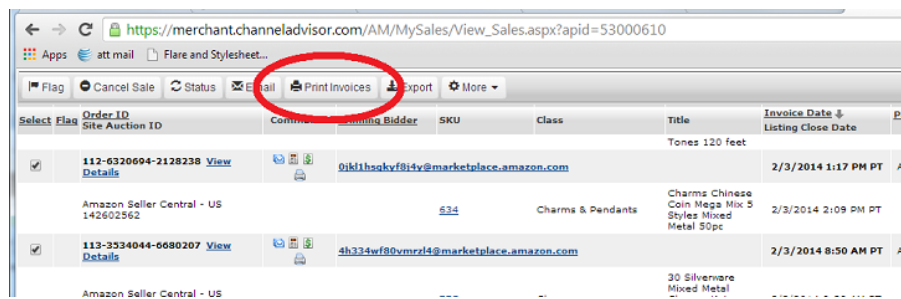
1. Sign in to channeladvisor at <https://login.channeladvisor.com/>

NOTE: The current user name and password are posted on the bulletin board.

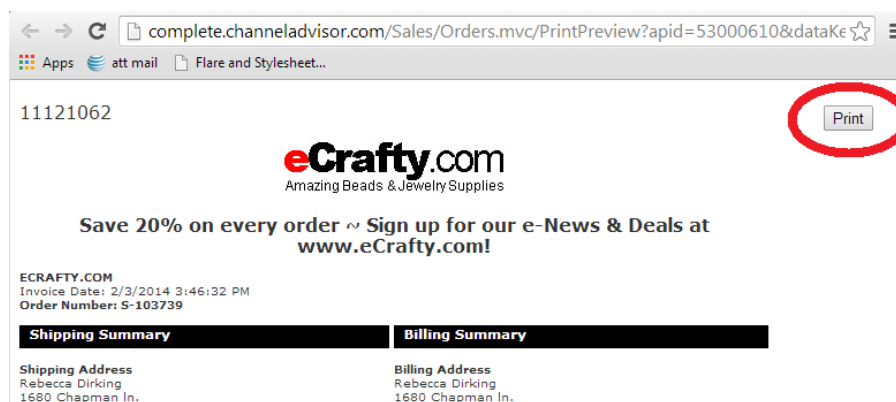
2. Choose the orders you are going to fill. (see "How to Log in and Choose Orders" for more information.)

Print Invoices

3. When you've selected all your orders, click "Print Invoices" in the menu bar.



4. The invoices will appear on the screen in a printable format. Click "Print."



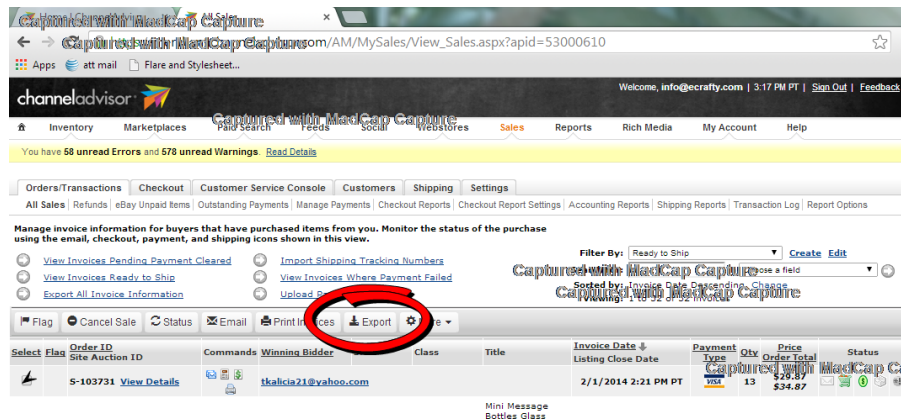
How to Export from ChannelAdvisor

There are three tasks we do that require exporting customer information from ChannelAdvisor--the [address tags](#), the [picklist](#), and the [addresses for Dazzle](#). You should be already [logged into ChannelAdvisor](#) and [have the appropriate orders selected](#).

Log in and Select Orders

Export Orders from Sales Screen

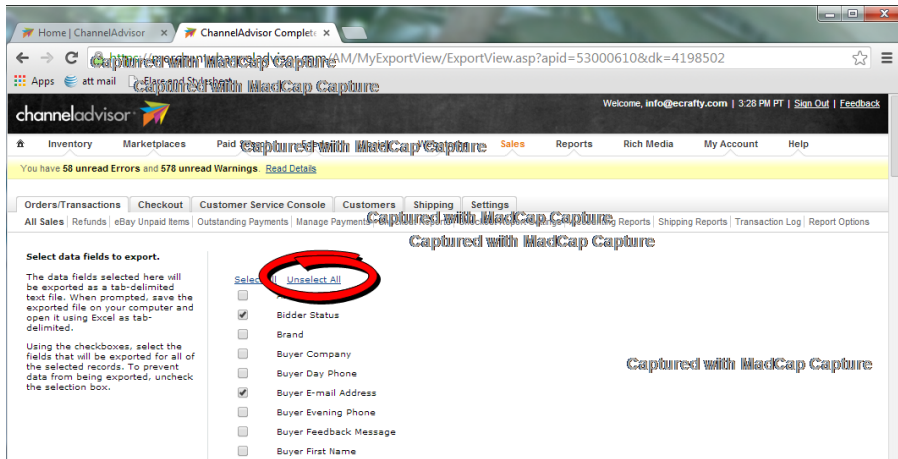
1. In ChannelAdvisor with the appropriate orders selected, click on the "Export" button. This will take you to a new screen.



The screenshot shows the ChannelAdvisor interface. At the top, there's a navigation bar with 'channeladvisor' logo and user info 'Welcome, info@ecrafty.com | 3:17 PM PT | Sign Out | Feedback'. Below that, a yellow banner indicates 'You have 58 unread Errors and 578 unread Warnings. Read Details'. The main content area has a 'Manage invoice information for buyers that have purchased items from you. Monitor the status of the purchase using the email, checkout, payment, and shipping icons shown in this view.' section. Below this, there are several action buttons: 'View Invoices Pending Payment Cleared', 'View Invoices Ready to Ship', 'Export All Invoice Information', 'Import Shipping Tracking Numbers', 'View Invoices Where Payment Failed', and 'Upload Orders'. The 'Export' button is circled in red. Below the buttons is a table with columns: 'Select', 'Flag', 'Order ID', 'Site Auction ID', 'Commands', 'Winning Bidder', 'Class', 'Title', 'Invoice Date', 'Listing Close Date', 'Payment Type', 'Qty', 'Price', 'Order Total', and 'Status'. The first row of data shows an order ID 'S-103731', a site auction ID, a winning bidder 'tkalcia21@yahoo.com', and an invoice date of '2/1/2014 2:21 PM PT'.

2. In ChannelAdvisor's export screen, click "Unselect All."

NOTE: The list comes preselected. These are ChannelAdvisor defaults and have nothing to do with us.



Select Information to Export

3. In the "Export" screen, you will select the information to export. You select by clicking on the box to the left of the information. What you select will be different depending on what document you are creating.

Address Tags	Pickliss	Dazzle Addresses
Buyer First Name	Buyer First Name	Buyer Company
Buyer Last Name	Buyer Last Name	Buyer E-Mail
Order ID	Order ID	Buyer Fhist Name
Shipping Address 1	Quantity	Buyer Last Name
Shipping City	SKU	Order ID
Shipping Postal Code	Title	Shipping Address 1
Shipping Region		Shipping Address 2
		Shipping City
		Shipping Country
		Shipping Postal Code
		Shipping Region

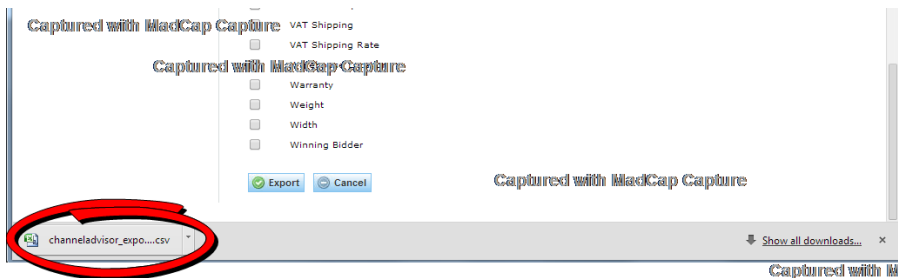
Export Orders

4. When you have selected the appropriate information, press the "Export" button at the bottom of the list.



NOTE: This creates an Excel file that you can see in the lower left part of the screen.

5. Open the Excel file by clicking on the file name.



Choose Your Next Step

Now you are ready for the next step--making the [Picklist](#) or [Address Tags](#) or saving the file to [import to Dazzle](#).

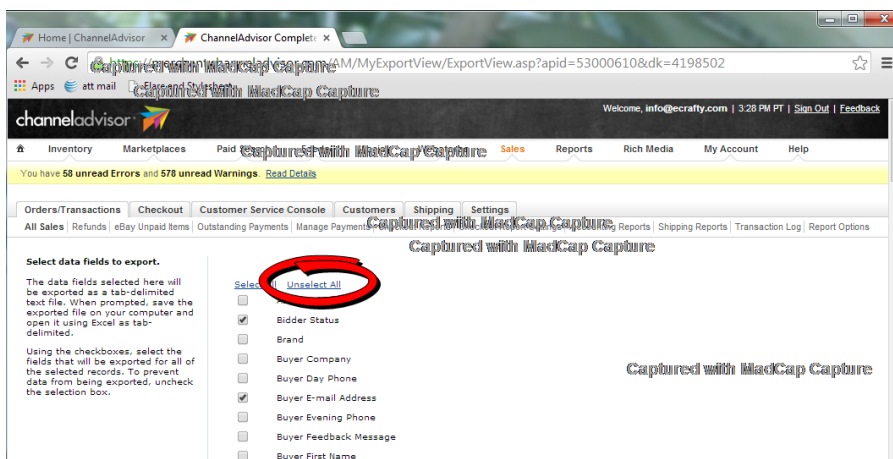
How to Create Address Tags

You are creating the address tags that get taped to the outside of the packages so that we know where to mail them. This help picks up where you left off in "How to Log in and Choose Orders" and "How to Export from ChannelAdvisor" and describes how to format the Excel file to make it into the address tags.

Log in, Choose Orders, Export

1. Complete the steps outlined in "How to Log in and Choose Orders" and "How to Export from ChannelAdvisor"
2. In ChannelAdvisor's export screen, click "Unselect All."

NOTE: You'll see the list comes preselected. These are ChannelAdvisor defaults and have nothing to do with us.

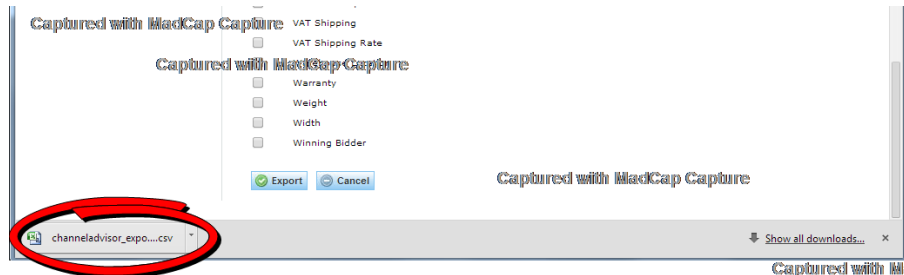


Select and Export Address Tags Attributes

3. Now, select the following attributes by clicking on the box in to the left of each one. (The list is in alphabetical order.)

- buyer first name
- buyer last name
- order ID
- shipping address 1
- shipping city
- shipping postal code
- shipping region

4. Press the "Export" button at the bottom of the list. This creates an Excel file that you can see in the lower left part of the screen.
5. Open the Excel file by clicking on the file name.

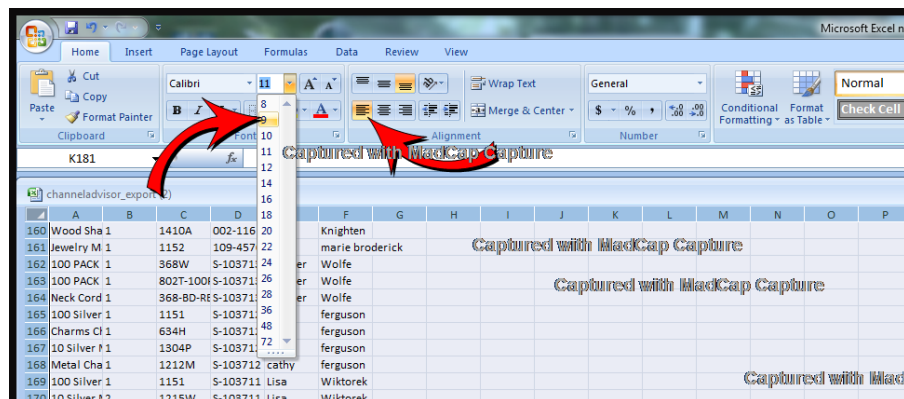


Now you'll have an Excel file open and you need to manipulate the columns to make it useful for the address tags.

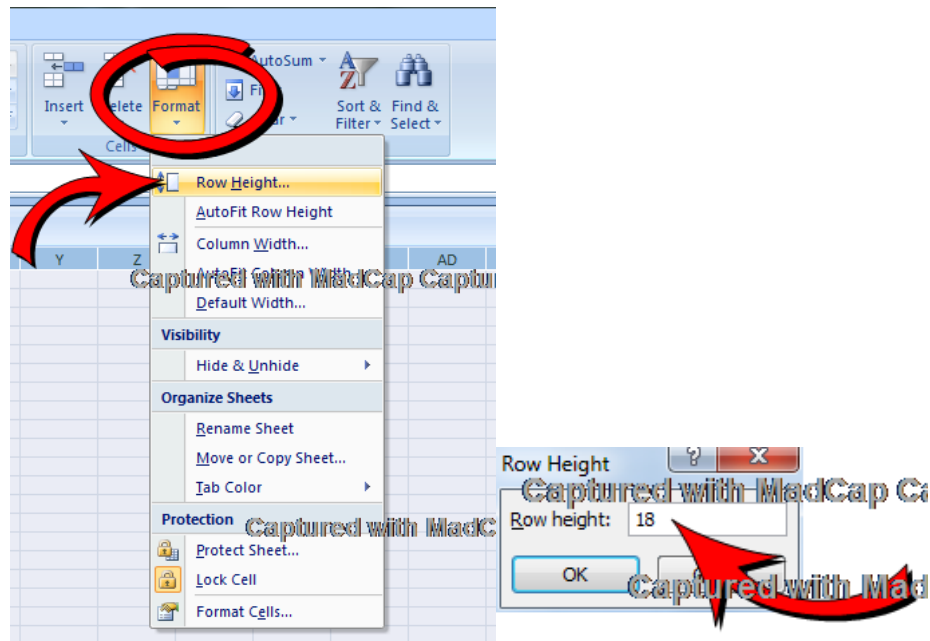
Reformat Type and Spacing of Excel File

NOTE: Columns are vertical and rows are horizontal.

6. Select "All" by pressing and holding the <Ctrl> and the <A> keys. (You'll know everything is selected because it is highlighted.)
7. With everything selected, change the font size to "9," the alignment to "left."



8. Click on "Format" in the menu bar. Choose "Row Height" and change the row height to "35."



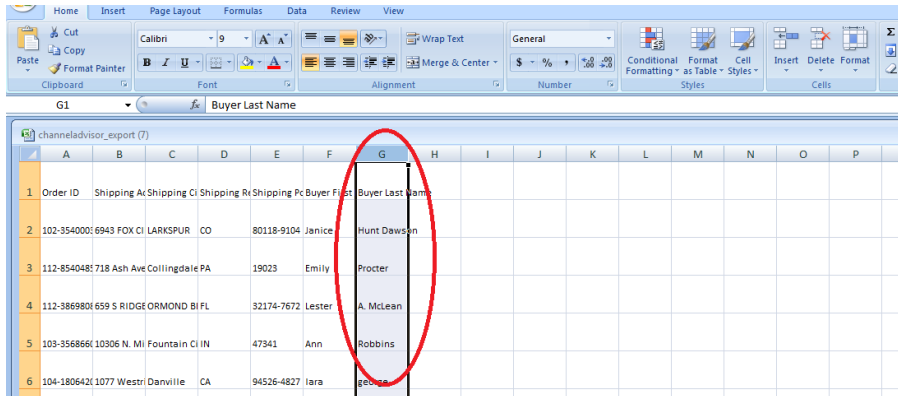
Now your file looks like this:

The image shows a screenshot of the Microsoft Excel interface displaying a spreadsheet. The spreadsheet has columns labeled A through N and rows numbered 1 through 8. The data in the spreadsheet is as follows:

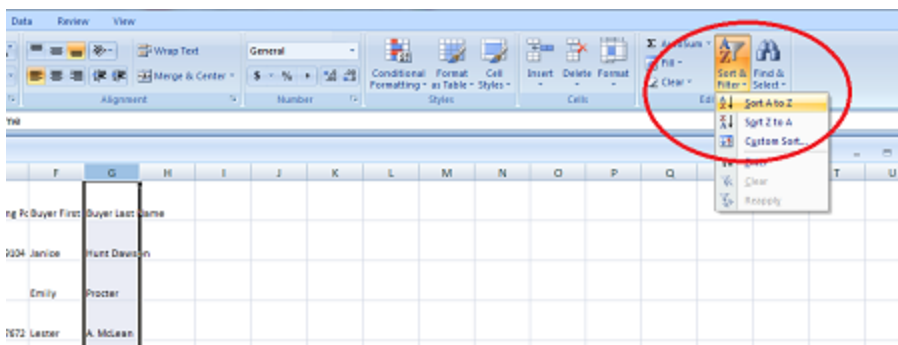
	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1	Order ID	Shipping Ac	Shipping O	Shipping Pr	Shipping Pt	Buyer First	Buyer Last Name							
2	102-3540001	6943 FOX CR	LARKSPUR CO		80118-9104	Janice	Hunt Dawson							
3	112-8540481	718 Ash Ave	Collingdale PA		19023	Emily	Procter							
4	112-3869801	659 S RIDGE ORMOND BL	FL		32174-7672	Lester	A. McLean							
5	103-3568661	10306 N. MI	Fountain Ct IN		47341	Ann	Robbins							
6	104-1806421	1077 Westridge	Danville CA		94526-4827	Iana	george							
7	5-109747	1210 S Hud	Tulsa OK		74112	Erik	Johnston							
8	114-0762431	1375 Birch	Montara CA		94037	Robin	Maslin							

Sort by Buyer Last Name

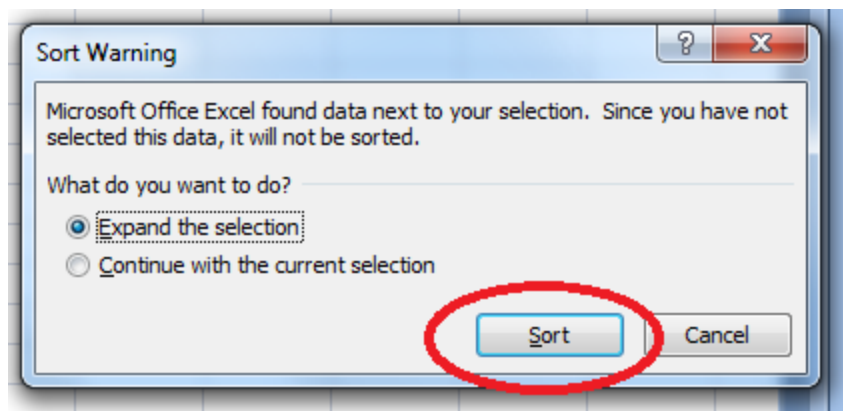
9. Select "Buyer Last Name" column by clicking the "G" cell. This will select and highlight the whole column



10. Click on "Sort and Filter" from the menu bar and choose "Sort A -Z" from the drop down menu.



11. Click "Sort" in the "Expand Selection" Sort Warning pop-up box.



Adjust Column Widths

12. Adjust the width of the columns by putting your cursor on a dividing line between two columns and holding down the right mouse button. This grabs the divider and you can move it right or left to make the column narrower or wider.

NOTE: It is best if you can make the columns all fit on a “portrait” oriented page. To see if it fits, you can get a preview by using either the file menu>Print or <Ctrl>+P The dotted line shows where the page margins are. If the text goes outside the margins, click on “home” in the upper left of the tool bar to take you back to the file to re-arrange the columns to make them fit. Each address must be on a single line on one page.

Print and Close

13. When the columns are adjusted, print using either the file menu>Print or <Ctrl>+P

14. Close the file using either the file menu>Close or <Ctrl>+W

You're done! You've made the address tags! The next thing to do with all the addresses still selected in ChannelAdvisor is to make the [Picklist](#). It is almost exactly the same process as making the address tags but you export different information and arrange it a little differently.

How to Create the Picklist

The Picklist is the itemized list of what we need to get from inventory to fill the orders and which orders need which items. This help picks up where you left off in "How to Log in and Choose Orders" and "How to Export from ChannelAdvisor" and describes how to format the Excel file to make it into the Picklist.

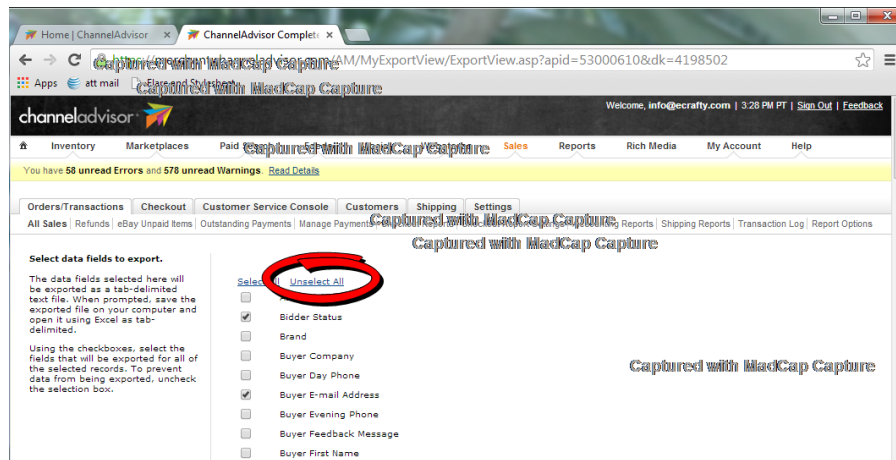
Log in, Choose Orders, Export

1. Complete the steps outlined in "How to Log in and Choose Orders" and "How to Export from ChannelAdvisor "

Select and Export Picklist Attributes

2. In ChannelAdvisor's export screen, click "Unselect All."

NOTE: The list comes preselected. These are ChannelAdvisor defaults and have nothing to do with us.



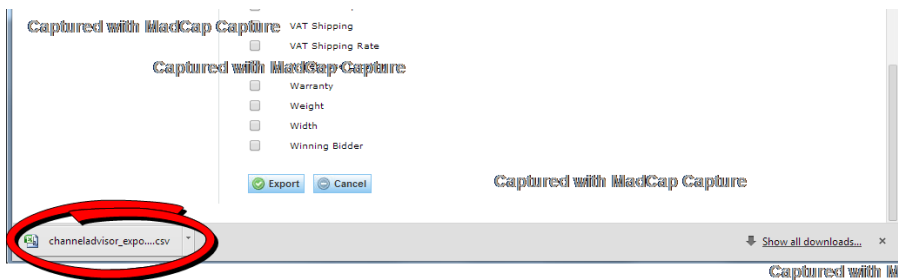
3. Select the following items by clicking on the box to the left of the item. (The list is in alphabetical order.)

- Buyer first Name
- Buyer Last Name
- Order ID
- Quantity
- SKU
- Title

4. Press "Export." This creates an Excel file that you can see in the lower left part of the screen.



5. Open the Excel file by clicking on the file name.

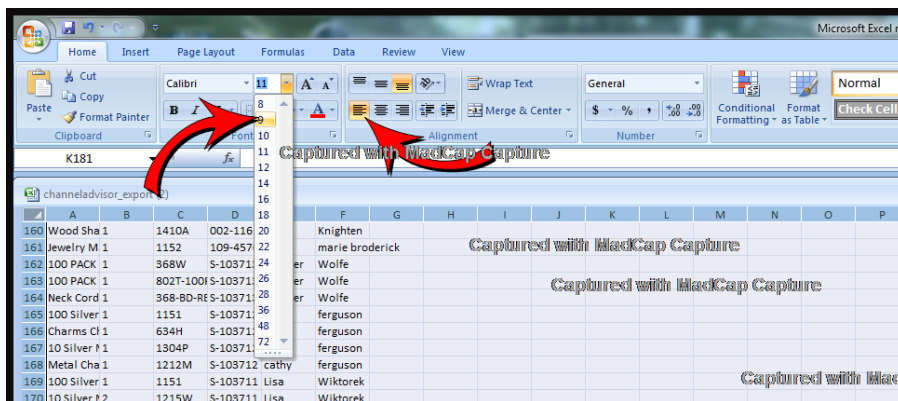


Reformat Type and Spacing of Excel File

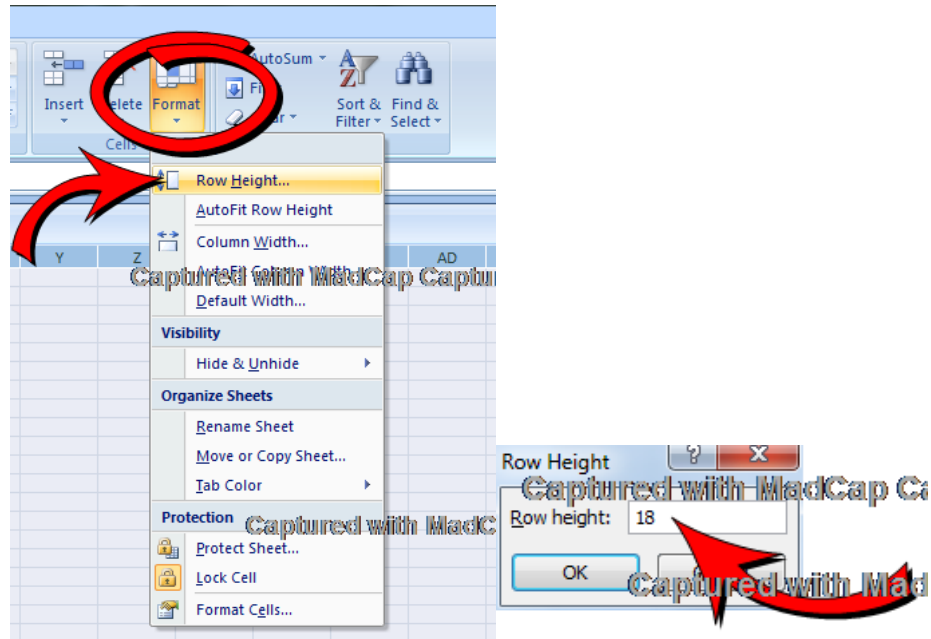
NOTE: Columns are vertical and rows are horizontal.)

6. Select All by pressing and holding <Ctrl> and <A>. (You'll know everything is selected because it is highlighted.)

7. With everything selected, change the font size to "9," the alignment to "left."



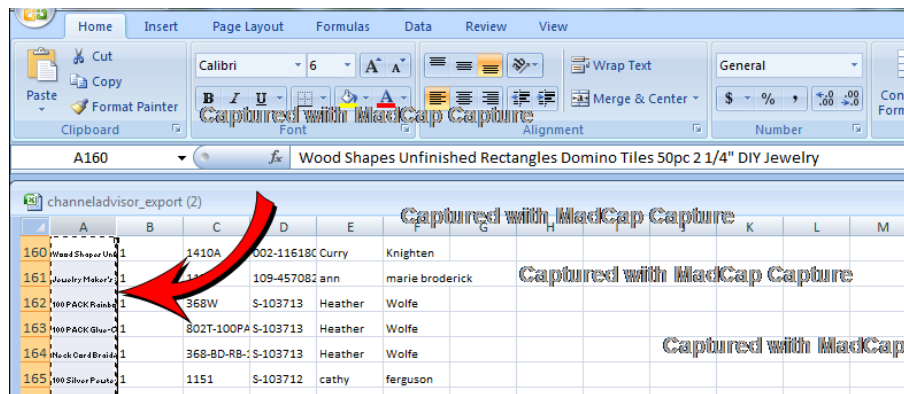
8. With everything selected, click on "Format" in the menu bar. Choose "Row Height" and change the row height to "18."



9. At this point, I like to make the "Title" column 6 pt type so the list will fit on the page better. You do this by clicking in the "A" at the top of that column. That selects the column, then go to font size in the menu bar and replace the "9" with a "6." (You have to actually type it in since it isn't a drop down choice.)

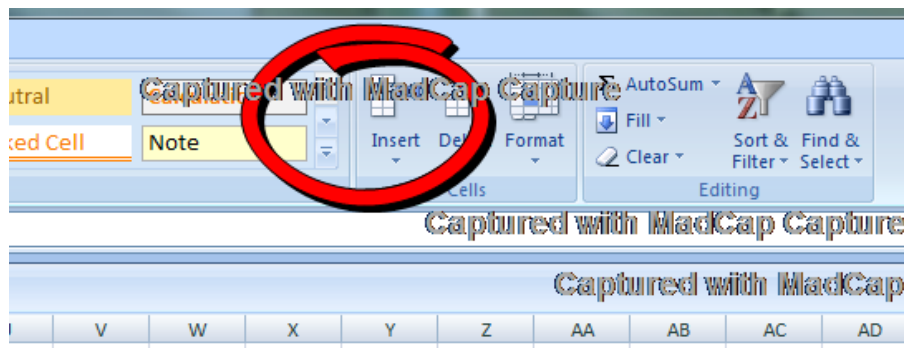
Re-arrange Columns in Picklist Order

10. Select the "Title" column again by clicking in the "A" at the top of the column. Cut the column. You can do this using the file menu, the right mouse button menu, or by pressing and holding the <Ctrl> key and pressing the "X" key. You will know you have "cut" the selection because it will have a dotted line around it.



11. Put your cursor in the "D" heading of the Order ID column. This selects the column. That is OK. You are just putting the cursor there so that the "cut" column will be inserted in the correct position to the left of the selected column.

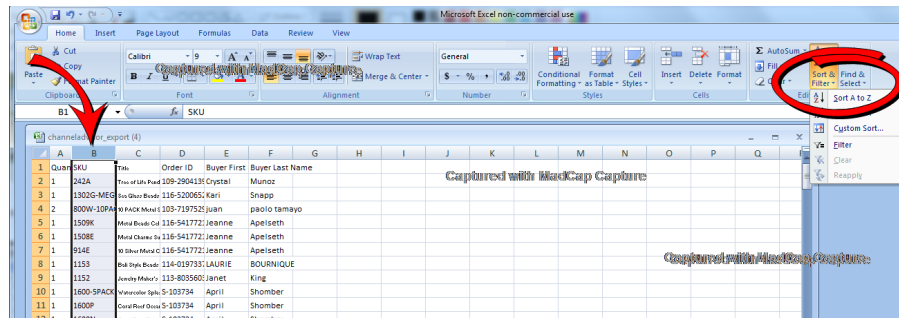
12. Use the "Insert" function on the menu bar to insert your selection. A regular "paste" will not work.



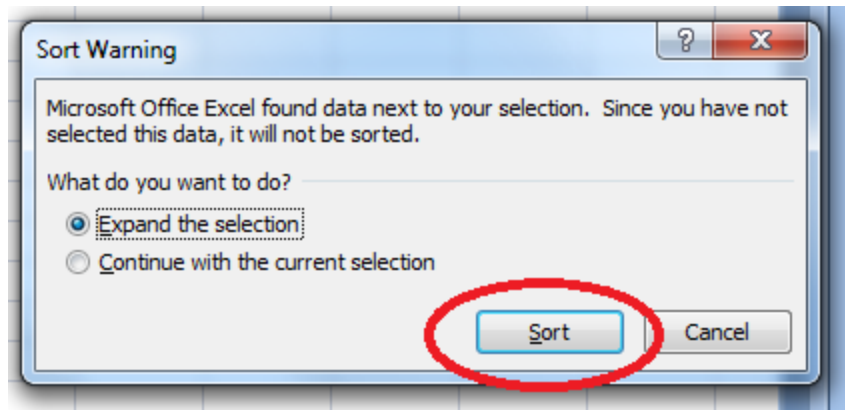
Sort by SKU

13. Select the SKU column by clicking in the "B" at the top of the column. The column will be highlighted.

14. Click on "Sort and Filter" from the menu bar and choose "Sort A -Z" from the drop down menu.



15. Click "Sort" in the "Expand Selection" Sort Warning pop-up box.



Adjust Column Widths

16. Adjust the width of the columns, by putting your cursor on a dividing line between two columns and holding down the right mouse button. This grabs the divider and you can move it right or left to make the column narrower or wider. You want to make the columns as narrow as possible so they will fit on the page.

HINT: To see if the Picklist fits when printed, press “print” (<ctrl> <p>) you can see a preview. The dotted line shows where the page margins are. If the text goes outside the margins, click on “home” in the upper left of the tool bar to take you back to the file to re-arrange the columns to make them fit.

Print the file

17. When the columns are adjusted, use the "File" menu to print and close the file.

You're done! You've made the Picklist! The next thing to do with all the addresses still selected in ChannelAdvisor is to [Save Addresses for Dazzle](#).

How to Save Addresses for Dazzle

We export the addresses for the current orders and save them in a form that can be imported by Dazzle (our posting software). You should already be [logged into ChannelAdvisor](#), [have the orders selected](#) and be in the export screen.

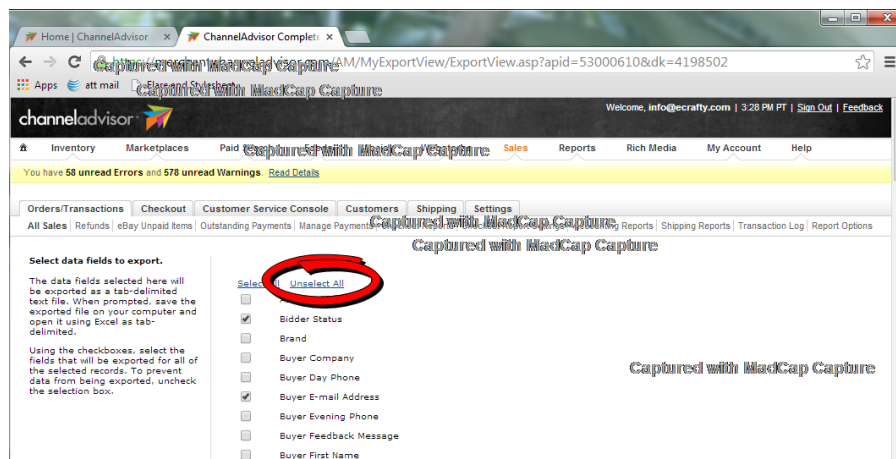
Log in, Choose Orders, Export

1. Complete the steps outlined in "How to Log in and Choose Orders" and "How to Export from ChannelAdvisor "

Select and Export Dazzle Attributes

2. In ChannelAdvisor's export screen, click "Unselect All."

NOTE: The list comes preselected. These are ChannelAdvisor defaults and have nothing to do with us.



3. Select the following items by clicking on the box to the left of the item. (The list is in alphabetical order.)

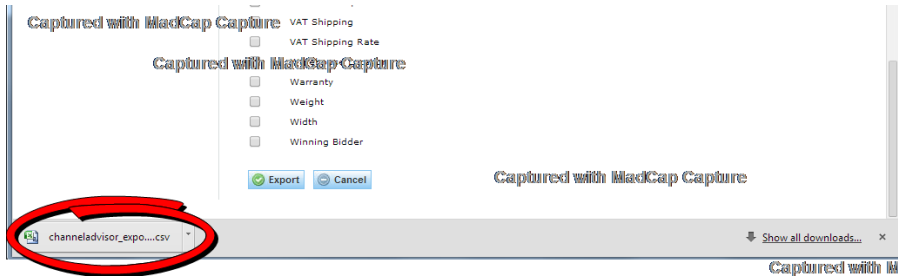
- Buyer Company
- Buyer E-mail Address
- Buyer First Name
- Buyer Last Name
- Order ID
- Shipping Addr 1
- Shipping Addr 2
- Shipping City
- Shipping Country
- Shipping Postal Code
- Shipping Region

4. When you have all those items selected, press the "Export" button at the bottom of the screen. This downloads an Excel file that you can see at the lower left of the screen.



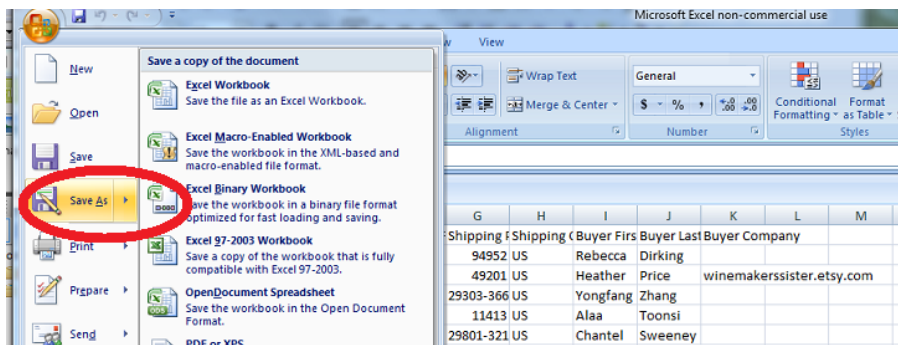
Open the Excel File

5. Click on the Excel file to open it.

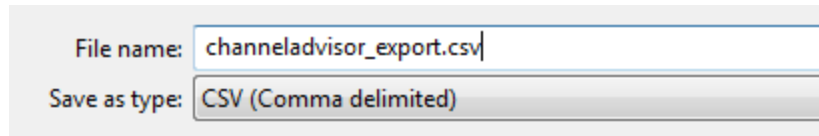


Save Excel File As

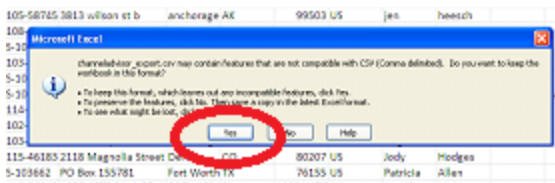
6. In your open Excel do a "Save As" from the file menu.



7. The file must be saved as:

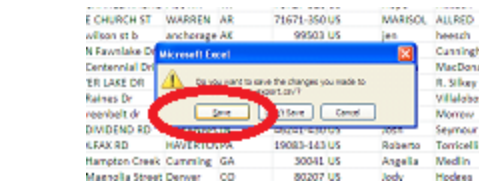


8. Excel will ask you a series of questions when you do this "save as."



Close Excel File

9. Close the file using the file menu>Close or <Ctrl>+W. Again it will ask you questions and you answer "Save" to the first one and "Yes" to the second one.



That's it! You have exported and saved the addresses to import into Dazzle! The next step is to open Dazzle and [import the file](#) you just created.

How to Import Addresses in Dazzle

This is the final step for importing addresses for the current orders into Dazzle (our mailing software). At this point you should have already logged in to [ChannelAdvisor](#), selected the appropriate orders, exported those orders to Excel, and [Saved the Excel file for Import](#).

Open Dazzle

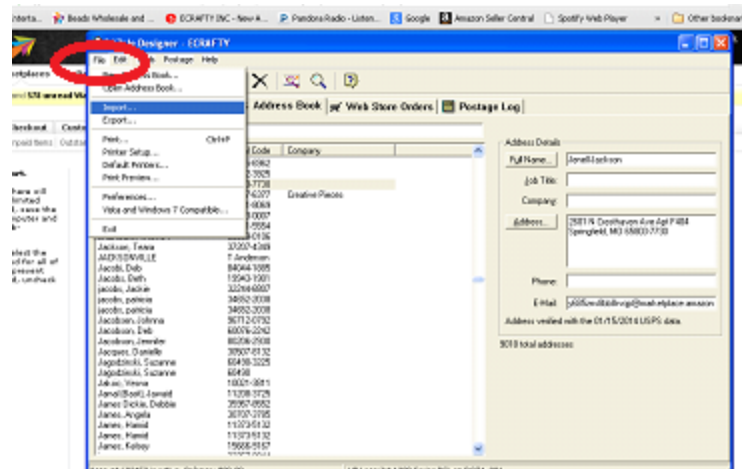
1. Double click on the Dazzle icon on the desktop of the main office computer.

Open the "Address Book"

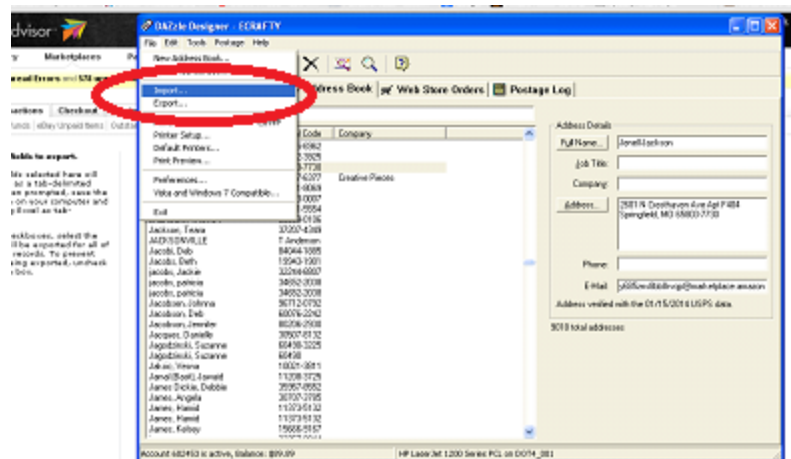
2. With Dazzle open, click on the "Address Book" tab.

Open the "Import" Pop Up

3. In the Address Book, click on "File" in the upper left of the menu bar.

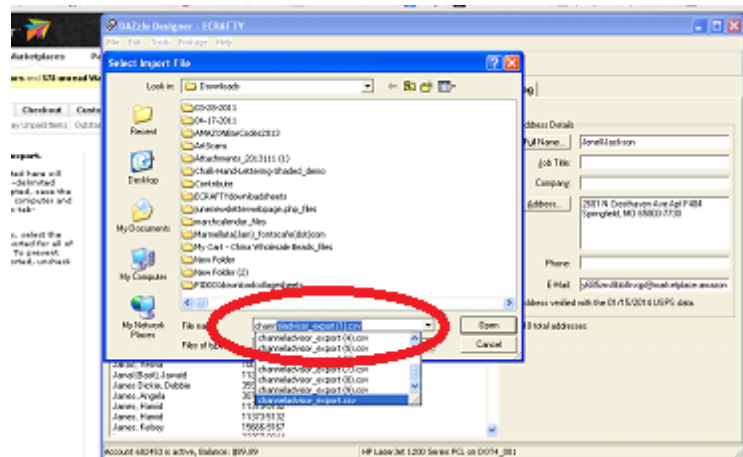


4. Click on "Import" from the drop down menu.



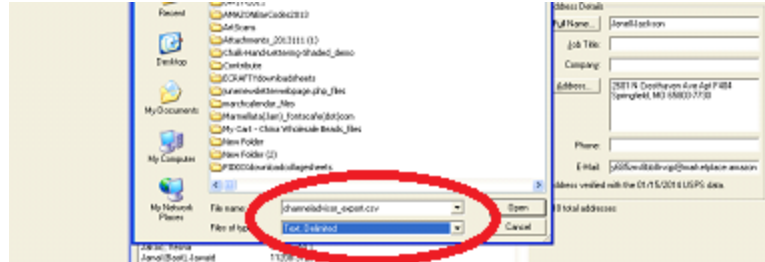
Choose the File to Import

5. Type the file name "channeladvisor_export.csv" into the file name box.



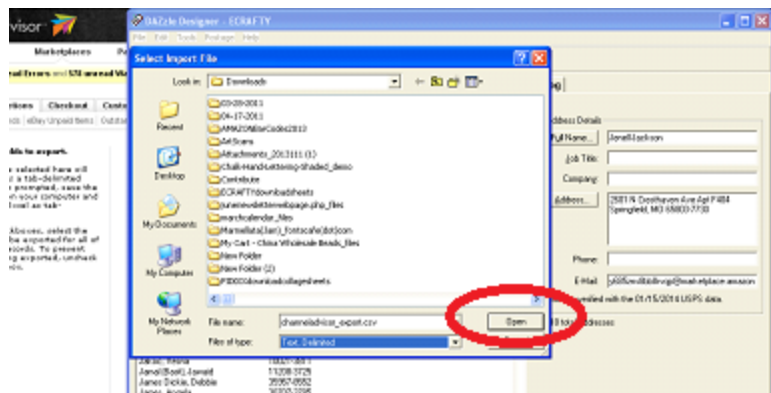
HINT: When you start typing "chan...." you'll see a list of files that all start with "channeladvisor" instead of typing the whole name, you can choose the filename from the list but it must be the one without a number and with the .csv extension.

6. Check that the "Files of Type" box says "Text Delimited."

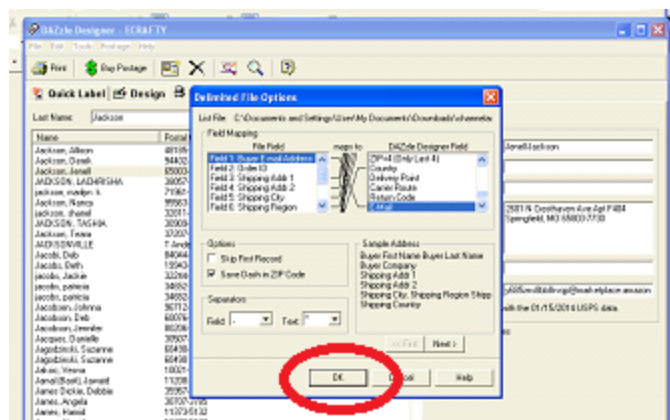


Import the File

7. Click "Open" to the right of the "File Name" box.



8. A Pop up screen will appear, click OK.



Congratulations! You are done! The addresses are in Dazzle and will be ready when we are ready to post.