

Importing Data

EROL's Data Import feature

Overview of Data Import in EROL

EROL's Data Import feature allows you to populate your store from a series of external data sources. The Import feature also provides the facility for upgrading your EROL store from one an earlier version.

The Data Import feature's ability to group and order products and pages means that your store can be populated with relative precision in a matter of minutes.

What can be imported

EROL's Data Import feature allows you to import:

- All your products and their relevant data from a Database
- All your products and their relevant data from a Comma Separated text file
- An EROL 1 store
- An EROL Small Store Edition store
- An EROL demo
- An Actinic™ Catalog store

Preparing your Data

Overview of preparing your data

If you are importing data from a Database or Comma Separated text file, the standard EROL import will pull in the data from your data source and populate your store using EROL's alpha-numeric ordering.

As such EROL allows you to group your products along a series of grouping/ordering rules, including:

- The order the products appear on the page
- Clusters of products presented as a single product (with price dependent options)
- Assigning products to pages

In order to utilise these ordering/grouping rules (especially Product Grouping and Page Grouping) you may be required to create an extra column or columns in your data source that can govern the grouping/ordering rules. We call this an ID Column.

What is an ID column

An ID column is an extra column in your data Spreadsheet or Database that acts as a sorting/grouping and/or ordering field for when you Group/Order your data during the EROL data import process.

An ID column exploits EROL's automatic alphanumeric ordering to force your data into groups or user-defined orders.

Creating an ID column for Item Ordering

An ID column ordering your Items on a page (i.e. what order they appear on the page) uses EROL's alphanumeric ordering to position your products on each page in a user-defined order.

To create an ID column for Item Ordering,

1. Add a new column (ie. Field) in your spreadsheet/database table
2. Name the field 'Page Order'
3. Locate the product(s) you wish to appear first on every new page
4. Place the numeric value '1' in the 'Page Order' field for that product(s) row(s)
5. Repeat this - increasing the numeric value each time - for every additional item you require per page.

When importing the data, you will then be able to order your products for each page by simply applying the 'Page Order' field as the ordering rule for Item Ordering.

Creating an ID column for Product Grouping

An ID column for Product Grouping (i.e. Clusters of products presented as a single product) uses EROL's alphanumeric ordering by applying the same value in the ID column to all products that make up a group. You can create as many clusters as you require.

To create an ID column for Product Grouping,

1. Add a new column (ie. Field) in your spreadsheet/database table
2. Name the field 'Product Grouping'
3. Locate the products you wish to group as an individual product
4. Place the same alphanumeric value in the 'Product Grouping' field for every product in the cluster.
5. Repeat this – using a different alphanumeric value - for all other product clusters.
6. Ensure that non clustered products are all assigned individual alphanumeric values so as not to be grouped with any of the clusters.

When importing the data, you will then be able to create Product Groups for each page by simply applying the 'Product Grouping' field as the ordering rule for Product Grouping.

Creating an ID column for Page Grouping

An ID column for Page Grouping (i.e. The products assigned to individual pages) uses EROL's alphanumeric ordering by applying the same value in the ID column to all products that you wish to appear on a page. You can create as many page groups as you require.

To create an ID column for Page Grouping,

1. Add a new column (ie. Field) in your spreadsheet/database table
2. Name the field 'Page Grouping'
3. Locate the products you wish to group on an individual page
4. Place the same alphanumeric value in the 'Page Grouping' field for every product you wish to appear on that page.
5. Repeat this – using a different alphanumeric value - for all other page groups.

When importing the data, you will then be able to create Page Groups for each page by simply applying the 'Page Grouping' field as the ordering rule for Page Grouping.

Preparing your tax field

When importing product data into your EROL store, it is important to stipulate whether the prices of the products are tax/VAT inclusive. You will need to create a new ID column for this.

To create a Tax/VAT Inclusive ID column,

1. Add a new column (ie. Field) in your spreadsheet/database table
2. Name the field 'Tax Inclusive'
3. For every product insert either a 'yes' or a 'no' for each product

When the data is imported, your product prices in the store will be correctly displayed.

Creating a style for your imported store

Before importing your data it is recommended you perform a certain amount pre-design so that your data can be imported with your desired look and feel applied to it.

In order to do this, you will need to create:

- A Product Item template that can be applied to all the products you import
- A Product Item Expanded View template (if your products have expanded views)
- A default Page (including background colour or image etc) with its initial layout table set to your requirements (number of columns per row etc.).

Stage 4 of the import data walkthrough requires you to select the above styles to apply to the new products.

CSV text file or Database table

There is essentially little difference between using a Database table or a CSV text file, as EROL handles either equally.

Remember though that if you do use a Comma Separated (CSV) text file, you will need to use the first line of all your fields as a header name, and then check 'Parse First Line as the Field Names' in Stage 1 of the data import process.

Importing your Data

Importing a Comma Separated Text file

EROL's simple step-by-step import process guides you through the stages of importing a CSV text file.

Before you begin, ensure that you have prepared your data with all necessary ID columns (if you require them)

Stage 1 – Selecting and Sourcing your Data

1. Select File > Import
2. Select 'CSV or MS Access Data Source'
3. Select your Source Type as 'Comma separated text file'
4. Browse for your CSV file
5. Check 'Parse First Line as the Field Names' if you wish EROL to not treat your first row as a product
6. Click 'Next'

Stage 2 – Matching your Data Fields to the EROL Fields

7. Select the fields from your data source (using the dropdowns) to match the EROL fields
8. Click 'Next'

Stage 3 – Grouping and Ordering your Products

9. Select the field in your data by which you wish to order your products on the page
10. Select the field in your data by which you wish to group clusters of products to appear as single products
11. Decide how you want to group your products on your store page(s)
12. Click 'Next'

Stage 4 – Selecting Defaults and Styles

13. Select a default template that can be applied to all the products you add to your store
14. Select a default expanded view template (if you have expanded views) that can be applied to all the products you add to your store
15. Select a page (which will include the first layout table of that page) which can act as a template page for all pages your import is about to create
16. Click 'Next' to finish up

Importing an MS Access Database

EROL's simple step-by-step import process guides you through the stages of importing an MS Access Database.

Before you begin, ensure that you have prepared your data with all necessary ID columns (if you require them)

Stage 1 – Selecting and Sourcing your Data

1. Select File > Import
2. Select 'CSV or MS Access Data Source'
3. Select your Source Type as 'MS Access Database'
4. Browse for your Database file
5. Click 'Next'
6. Select the MS Access Table from the Database
7. Click 'Next'

Stage 2 – Matching your Data Fields to the EROL Fields

8. Select the fields from your data source (using the dropdowns) to match the EROL fields
9. Click 'Next'

Stage 3 – Grouping and Ordering your Products

10. Select the field in your data by which you wish to order your products on the page
11. Select the field in your data by which you wish to group clusters of products to appear as single products
12. Decide how you want to group your products on your store page(s)
13. Click 'Next'

Stage 4 – Selecting Defaults and Styles

14. Select a default template that can be applied to all the products you add to your store
15. Select a default expanded view template (if you have expanded views) that can be applied to all the products you add to your store
16. Select a page (which will include the first layout table of that page) which can act as a template page for all pages your import is about to create
17. Click 'Next' to finish up

Importing an EROL 1 Store

Importing your EROL 1 store into EROL 2 is a simple automated task.

To import an EROL 1 store:

1. Select File > Import
2. Select the EROL version you wish to import
3. Browse for the file data.mdb
4. Click 'Go'

Importing an EROL Small Store Edition Store

Importing your EROL Small Store Edition store into EROL 2 is a simple automated task.

To import an EROL Small Store Edition store:

1. Select File > Import
2. Select EROL Small Store
3. Browse for the file data2.mdb
4. Click 'Go'

Importing an EROL Demo

Importing your EROL 2 Demo store into EROL 2 is a simple automated task.

To import an EROL 2 Demo store:

1. Select File > Import
2. Select EROL 2 Demo
3. Browse for the file data2.mdb
4. Click 'Go'

Importing an Actinic™ Catalog Store

If you are switching to EROL from Actinic™ Catalog (v3 and above) product, EROL will automate this task for you.

To import an Actinic™ Catalog:

1. Select File > Import
2. Select 'CSV or MS Access Data Source'
3. Select your Source Type as 'MS Access Database'
4. Browse for your Actinic™ Catalog .MDB file
5. Click 'Next'
6. Select Actinic™ Catalog
7. Click 'Go'