

Exporting template



- Where will we see these templates?
- Add template
 - Name
 - Template entity
 - Template fields
 - Fields settings
 - Grouping
- Edit
- Delete

Configuration Orders Exporting template

Configuring data for Export

The screenshot shows the 'Exporting template' configuration page. The sidebar on the left has 'Configuration' highlighted. The main area has 'Orders' and 'Exporting template' highlighted. The configuration includes a list of templates on the left and a configuration panel on the right with fields for 'Template name', 'Template entity', and 'Template fields'.

Where will we see these templates?

Clicking "Export" button in all places of admin panel will allow you to choose which export to perform.

The screenshot shows the 'Customers' list page. The sidebar has 'Users' highlighted. At the bottom right, the 'Export' button is highlighted with a red box, and its dropdown menu is open, showing options like '.xml', '.xls', '.txt', 'Export users', and 'New Users'.

Add template

Click "+" (Add) on the left side of the page

General Delivery_order_profile Bank receipt **Exporting template**

Exporting template Russian (Русский) ▾

Order - goods list export (group by vendor name) x

Export users x

Order - goods list export (group by status name) x

Order export x

Order - goods list export x

Order list export x

Goods list export x

+

Template name [Order - goods list export \(group by status name\)](#)

Template entity [OrderLineFromSingleOrder](#)

Template fields

Added: Order id (from order line) +

+ Order item... x

+ Link x

+ Image x

+ Item id x

+ Configuration x

+ Quantity (fr... x

+ Original pri... x

Forms to fill out will appear on the right.

Name

Specify template name (this name can be changed at any time)

Exporting template Russian (Русский) ▾

Order - goods list export (group by vendor name) x

Export users x

Order - goods list export (group by status name) x

Order export x

Order - goods list export x

Order list export x

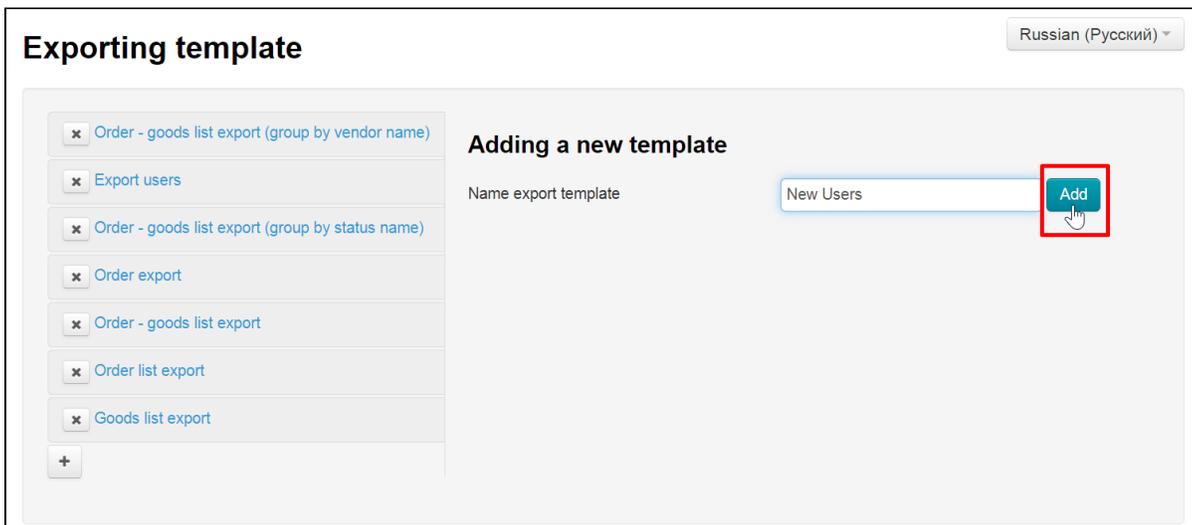
Goods list export x

+

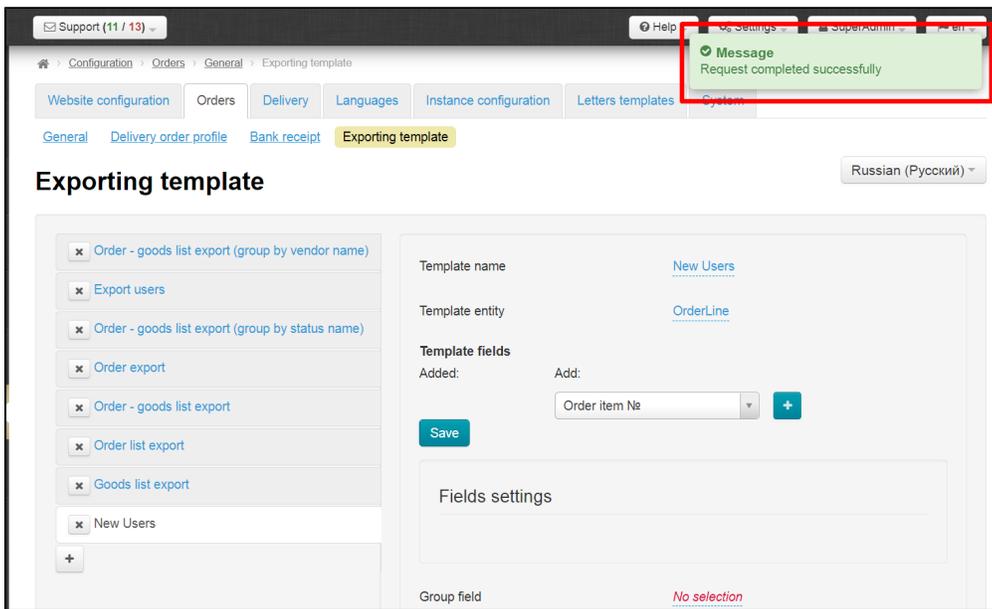
Adding a new template

Name export template **Add**

Click "Add" button



Template was created



We will configure it now. The point of the setting: select the data fields required for export. You need to select those fields that will help you work with the exported data as efficiently as possible. The more convenient the file is, the faster you can process information.

Pay attention to fields order in the template as well as fields grouping.

Template entity

Select template entity first. This is "User" in our case. Click blue dotted text.

Exporting template English (English) ▾

- x Order - goods list export (group by vendor name)
- x Export users
- x Order - goods list export (group by status name)
- x Order export
- x Order - goods list export
- x Order list export
- x Goods list export
- x New Users
- +

Template name [New Users](#)

Template entity OrderLine

Template fields

Added: Add: +

Save

Fields settings

Select appropriate entity in drop-down list. It is necessary to show you all added templates during export. There are 5 places in total where you can export from and all these 5 places are template entities.

Exporting template English (English) ▾

- x Order - goods list export (group by vendor name)
- x Export users
- x Order - goods list export (group by status name)
- x Order export
- x Order - goods list export
- x Order list export
- x Goods list export
- x New Users
- +

Template name [New Users](#)

Template entity OrderLine ✓ x

Template fields

Added: Add: +

Save

Fields settings

Save choice

Exporting template English (English) ▾

- x Order - goods list export (group by vendor name)
- x Export users
- x Order - goods list export (group by status name)
- x Order export
- x Order - goods list export
- x Order list export
- x Goods list export
- x New Users
- +

Template name [New Users](#)

Template entity User ✓ x

Template fields

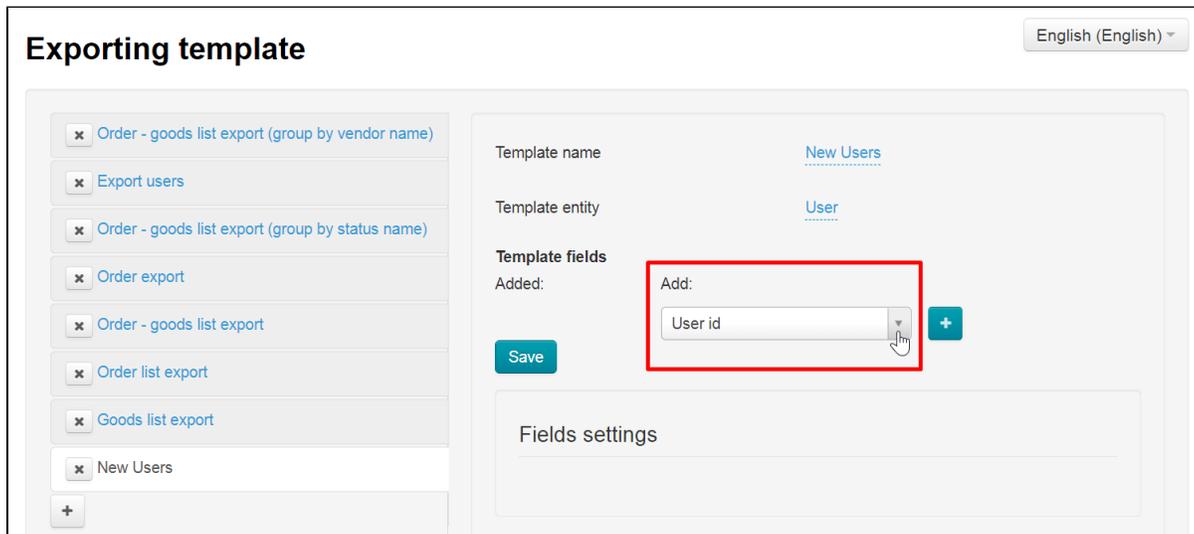
Added: Add: +

Save

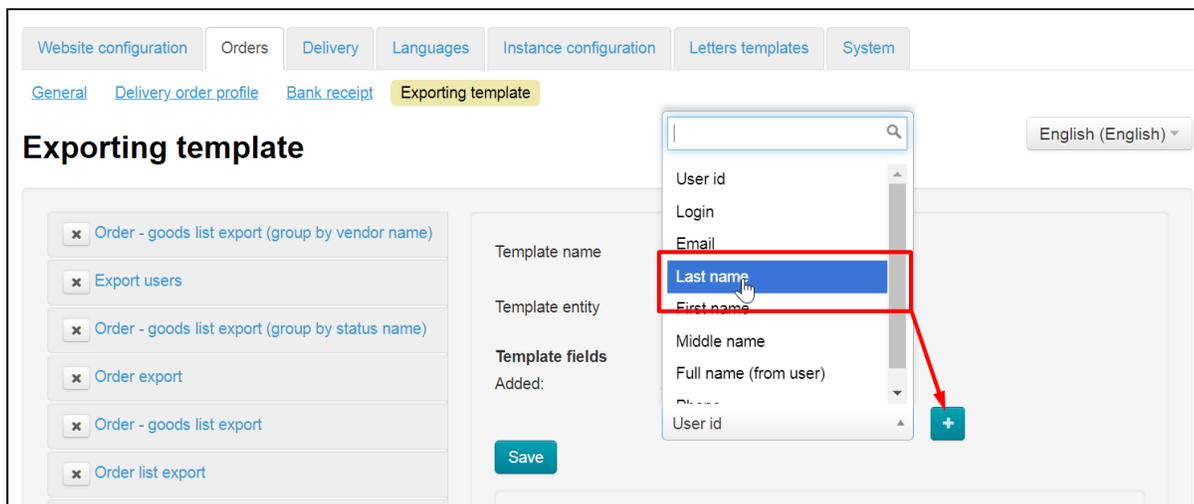
Fields settings

Template fields

Select template fields from the list on the right



Click field title and press "+" button



Thus we make a full list of export fields and save

Exporting template

The interface shows a list of templates on the left, including 'New Users' which is selected. On the right, the configuration for the 'New Users' template is shown. The 'Template name' is 'New Users' and the 'Template entity' is 'User'. Under 'Template fields', there is an 'Added' section with a list of fields: Last name, User id, Login, Email, Full name (...), and Phone. A 'First name' dropdown is also present. A red box highlights the 'Save' button at the bottom.

Fields can be swapped. Hold down the cross symbol with arrows to the left of the field name to do it

Exporting template

The interface is the same as the first image, but the 'Phone' field is now being dragged into the 'Added' section. A red box highlights the 'Phone' field, and a red arrow points to the 'Email' field, indicating the drag operation.

Hold the cross with the mouse and transfer to the right place

Exporting template

Order - goods list export (group by vendor name)

Export users

Order - goods list export (group by status name)

Order export

Order - goods list export

Order list export

Goods list export

New Users

+

Template name [New Users](#)

Template entity [User](#)

Template fields

Added: Add:

+ Last name First name +

+ User id Phone +

+ Phone +

+ Login +

+ Email +

+ Full name (...)

Save

Save changes after that

Exporting template

Order - goods list export (group by vendor name)

Export users

Order - goods list export (group by status name)

Order export

Order - goods list export

Order list export

Goods list export

New Users

+

Template name [New Users](#)

Template entity [User](#)

Template fields

Added: Add:

+ Last name First name +

+ User id +

+ Phone +

+ Login +

+ Email +

+ Full name (...)

Save

Fields settings

Fields settings

Last name	Original name	Last name
User id	Name of field	Last name
Phone	Sorting	None
Login	Grand total	None
Email		
Full name		

Group field No selection

Each field has a separate setting. The set of settings may vary depending on the field type.

Click field names to open the settings

Fields settings

Last name	Original name	Last name
User id	Name of field	Last name
Phone	Sorting	None
Login	Grand total	None
Email		
Full name		

Group field No selection

Fields settings

Last name	Original name	Phone
User id	Name of field	Phone
Phone	Sorting	
Login		
Email		
Full name	Grand total	None

Group field No selection

Grouping

It is possible to group data in an export by some attribute. The grouping setting is at the bottom of the page after "Fields settings" block

Field	Original name	Phone
Last name	Original name	Phone
User id	Name of field	Phone
Phone	Sorting	None
Login	Grand total	None
Email		
Full name		

Group field: [No selection](#)

Click "No selection" and select the field by which we want to group data. For example, you can group by Vendor ID (if we are talking about exporting orders) - all orders of each seller will stand side by side, which will simplify document processing

Edit

Select a template and click it to edit

Configuration > Orders > General > Exporting template

Website configuration | Orders | Delivery | Languages | Instance configuration | Letters templates | System

General | Delivery order profile | Bank receipt | **Exporting template**

English (English)

Exporting template

- Order - goods list export (group by vendor name)
- Export users**
- Order - goods list export (group by status name)
- Order export
- Order - goods list export
- Order list export
- Goods list export
- New Users

Template name: [New Users](#)

Template entity: [User](#)

Template fields

Added:

Add:

+ Last name x First name +

+ User id x

+ Phone x

+ Login x

+ Email x

+ Full name ... x

All fields that can be configured will open after clicking. For example, you can add or remove extra fields

Exporting template

English (English) ▾

- Order - goods list export (group by vendor name)
- Export users
- Order - goods list export (group by status name)
- Order export
- Order - goods list export
- Order list export
- Goods list export
- New Users

Template name [Export users](#)

Template entity [User](#)

Template fields

Added: Add:

- Login
- Email
- Full name ...
- Phone
- User id
- Last name

First name

Save Remove

Fields can be swapped. Hold down the cross symbol with arrows to the left of the field name to do it

Exporting template

- Order - goods list export (group by vendor name)
- Export users
- Order - goods list export (group by status name)
- Order export
- Order - goods list export
- Order list export
- Goods list export
- New Users

Template name [New Users](#)

Template entity [User](#)

Template fields

Added: Add:

- Last name
- User id
- Login
- Email
- Full name (...)
- Phone

First name

Save

Hold the cross with the mouse and transfer to the right place

Exporting template

Order - goods list export (group by vendor name)

Export users

Order - goods list export (group by status name)

Order export

Order - goods list export

Order list export

Goods list export

New Users

+

Template name [New Users](#)

Template entity [User](#)

Template fields

Added: Add:

+ Last name First name +

+ User id Phone +

+ Phone +

+ Login +

+ Email +

+ Full name (...) +

Save

Save changes after that

Exporting template

Order - goods list export (group by vendor name)

Export users

Order - goods list export (group by status name)

Order export

Order - goods list export

Order list export

Goods list export

New Users

+

Template name [New Users](#)

Template entity [User](#)

Template fields

Added: Add:

+ Last name First name +

+ User id +

+ Phone +

+ Login +

+ Email +

+ Full name (...) +

Save

It is possible to change data grouping

Fields settings

Login	Original name	Login
Email	Name of field	Login
Full name	Sorting	None
Phone	Grand total	Sum
User id	Group total	None
Last name		

Group field [User id](#)

Group header type [RepeatMainTitle](#)

Delete

Select unnecessary template from the list and click the cross to the left of the template name

Exporting template

English (English) ▾

- Order - goods list export (group by vendor name)
- Export users**
- Order - goods list export (group by status name)
- Order export
- Order - goods list export
- Order list export
- Goods list export
- New Users

Template name [Export users](#)

Template entity [User](#)

Template fields

Added: Login Email Full name ... Phone User id Last name

Add: First name +

Save

Template is permanently deleted, so you need to confirm the action. Click "Yes" if you are sure that the template is no longer needed

Please confirm deletion

Are you sure you want to remove?