



Order to CSV

Comprehensive User Guide

Documentation update v1.5.16 • Current app workflow through v1.5.16

Create clear mobile sales orders and send the office both structured CSV data and a professional PDF copy.

1. What Order to CSV Is For

Order to CSV is designed for salespeople who take orders away from the office and need a clear, repeatable way to send those orders back for processing. Instead of relying on handwritten order forms, photos of paperwork, or loosely formatted notes, the salesperson builds the order directly on an iPhone or iPad using customer and item data supplied by the company.

When the order is ready, the app can produce two versions of the same order: a configurable CSV file for systems that can import structured order data, and a professional Mobile Order PDF that office staff can read even when direct import is not available.

Primary business benefit: The office receives a legible, structured order that can reduce handwriting questions, avoid unnecessary re-entry, and speed up order processing. The CSV is useful when the receiving ERP supports the configured import format; the PDF remains useful as a readable reference or manual-processing fallback.

2. What the App Can Do

- Import customer and item catalogs from CSV files using flexible column mapping.
- Work with larger catalogs using a local indexed database and limited-result searching.
- Search customers by customer information and keep Favorites and recently used customers easy to reach.
- Search items by item number, description, or scan code.
- Scan supported barcodes or QR codes using the device camera for item lookup.
- Create orders with editable PO, order type, order date, quantities, sizes/variants, prices, order notes, and line-item notes.
- Use iOS keyboard dictation in supported text fields when dictation is enabled on the device.
- Warn when a PO already appears in Recent Orders.
- Create reusable outbound CSV profiles with custom header names, column order, and field mappings.
- Preview a professional Mobile Order PDF using company information and a user-defined disclaimer.
- Save/share the CSV and PDF together or email both files together.
- Track orders as Draft, Sent, or Imported.
- Reopen and edit Draft orders; change Sent or Imported orders back to Draft when a correction is required.
- Add customers and items manually or clear one catalog without clearing the other.

3. Quick Start

1. Open Settings and enter Company Information, a Mobile Order Disclaimer, the default outbound CSV profile, and the default email recipient.
2. Import the customer CSV and map Customer Number and Customer Name. Map optional address fields if available.
3. Import the item CSV and map Item Number, Description, and Price. Map Size/Variant and Barcode/Scan Code if available. Confirm every Item Number is unique.
4. Tap Create New Order, select a customer, review or replace the automatic PO, and add items.
5. Adjust quantities, sizes, prices, and notes as needed, then tap Review Order.
6. Preview the Mobile Order PDF and verify the order total and item details.

7. Save Draft, Save/Share CSV + PDF, or Email Order CSV + PDF.
8. Use Recent Orders and status values to track the order through Draft, Sent, and Imported.

4. First Launch and Settings

Terms of Use & Disclaimer

The first time Order to CSV is used, the app presents its Terms of Use & Disclaimer and requires explicit acceptance before continuing. The accepted terms remain available later under Settings > Setup > Terms of Use & Disclaimer.

Company Information

Enter Company Name, Address, City, State, and ZIP. These values are printed in the upper-left company area of the Mobile Order PDF. Keep them current because the PDF uses the settings that are saved in the app.

Mobile Order Disclaimer

Enter the text that should appear in the footer of the Mobile Order PDF. This is intended for the company's own order terms, notice, or disclaimer. It is separate from the app developer's Terms of Use. The Mobile Order disclaimer does not change the CSV output.

Default Outbound File

Choose the CSV profile most commonly used by the home office. This becomes the default on new orders, but the salesperson can choose a different profile on the Review Order screen before creating the CSV.

Default Email Recipient

Enter one email address or multiple addresses separated by commas or semicolons. The address is filled into the order email screen automatically and can still be changed for a specific order.

Scanner

Barcode and QR scanning uses the device camera. For the best exact-match experience, include a Barcode/Scan Code field in the imported item file. The scanner also checks Item Number.

5. Preparing Customer and Item CSV Files

The source CSV files do not need to use special fixed header names. During import, Order to CSV displays the headers it found and asks the user to map those headers to the fields used by the app. The file should contain a header row followed by data rows.

Customer fields

App Field	Required?	Purpose
Customer Number	Required	Unique account or customer code used to identify the customer.
Customer Name	Required	Customer or company name shown during search and on orders.

Address	Optional	Street address used for customer reference and PDF output when available.
City	Optional	Customer city.
State / Province	Optional	Customer state or province.
ZIP / Postal Code	Optional	Customer postal code.

Item fields

App Field	Required?	Purpose
Item Number	Required	Primary item identifier used for search and order output.
Description	Required	Human-readable item description.
Price	Required	Default unit price loaded when the item is added to an order.
Size / Variant	Optional	Default size or variant; it remains editable on each order line.
Barcode / Scan Code	Optional	Value used for exact scanner lookup.

Important: Every Item Number must be unique. Duplicate item numbers can cause the app to match or return the wrong item. The company should verify uniqueness before distributing an item file to salespeople.

6. Importing Customer and Item Data

1. From the main screen, tap Import / Update Customers CSV or Import / Update Items CSV.
2. Choose the CSV file from the iOS file picker.
3. Review the file size, number of columns, and the preview information shown by the app.
4. Map each required app field to the correct source-column header. Optional fields may be left as Not Used.
5. Review the First Row Preview to confirm the mappings are correct.
6. Tap Import. If a catalog already exists, confirm that the new file should replace it.
7. Keep Order to CSV open until the import completes.

A successful customer import replaces the active customer catalog. A successful item import replaces the active item catalog. The import is designed so the currently active catalog remains available until the replacement completes successfully. Recent Orders, outbound profiles, and Settings are not cleared by a catalog replacement.

The app remembers successful column mappings, which can reduce setup time when future files use the same or similar headers.

7. Managing Customers and Items

Customers

Open Customers from the Data section to browse or search the customer catalog. The customer list can show a limited initial set for performance; use Search to find any customer in the catalog. A customer can be marked as a Favorite using the star.

Items

Open Items to browse or search the item catalog. Large catalogs are searched in the local database rather than displayed in full all at once.

Add records manually

Add New Customer requires Customer Number and Customer Name. Address information is optional. Add New Item requires Item Number, Description, and Price; Size/Variant and Barcode/Scan Code are optional. Manual records become available immediately. Use a unique Item Number when adding an item manually.

Clear catalog data

Clear All Customers removes only the customer catalog. Clear All Items removes only the item catalog. The other catalog, Recent Orders, Settings, and outbound profiles are retained. The app requests confirmation before clearing a catalog.

Data Information

Settings > Data Information shows customer count, item count, Recent Orders count, catalog database size, and details about the most recent imports such as record count, source-file size, import time, and average rate.

8. Creating a New Order

Create New Order becomes available after both a customer catalog and an item catalog exist.

Select the customer

Tap Select Customer. Search by customer information, or use Favorites and recently selected customers. Selecting the customer associates the saved customer record with the order.

PO Number

A new order starts with an automatically generated PO using the format MM-DD-HHMMSS. Example: 09-13-154530. HHMMSS uses 24-hour time. The full PO field remains editable, so the salesperson can replace the generated value with the customer's actual PO or another company-approved reference.

Order Type and Date

The Order Type starts with the current app default and can be edited. The Order Date can also be changed before the order is reviewed.

Order Notes

Order Notes are for information that applies to the whole order, such as delivery instructions, special handling, event information, or other office instructions. The selected outbound file profile determines which CSV column

receives the order note. Because the CSV contains one row per item, order-level information is repeated on the item rows where mapped.

Dictation: Order to CSV uses normal iOS text fields. If dictation is enabled on the iPhone or iPad, the salesperson can use the microphone button on the Apple keyboard to dictate supported notes instead of typing them.

9. Adding Items to an Order

Search

Tap Add or Scan Item. Search by Item Number, Description, or Scan Code. For large catalogs, the app returns a limited group of matching records instead of loading the whole catalog into the screen.

Scan

Open the camera scanner and scan the product barcode or supported QR code. The scanner first attempts an exact Barcode/Scan Code match and also checks Item Number. Camera permission must be enabled in iOS Settings.

Edit the order line

Feature	What it means
Size / Variant	Editable after the item is added. The ordered size can differ from the catalog default.
Quantity	Adjusted with the quantity control; supported range in the current order screen is 1 through 999.
Price	Editable for the order. The catalog price is the starting value, not a locked value.
Line Notes	Optional note that applies only to that item line and can be mapped to a separate CSV column.
Remove Item	Use the normal iOS delete gesture on the item list before review.

The order total updates from the order lines so the salesperson can see the calculated total before review.

10. Duplicate PO Warning

When Review Order is tapped, Order to CSV checks Recent Orders for the same PO. If a match is found, the app warns the user and shows examples. The user may go back and change the PO or continue intentionally. When editing an existing order, the current saved order is excluded from its own duplicate-PO check.

11. Reviewing the Order

The Review Order screen is the final checkpoint before saving or transmitting an order. Verify the customer name and number, PO, order type, date, order notes, every item, quantities, sizes, unit prices, line notes, line totals, and order total.

Choose the outbound CSV profile

The currently selected outbound file profile appears on the Review screen. Change it here when a particular order needs a different destination format. This does not change the underlying order; it changes how the CSV is written.

Preview the Mobile Order PDF

Tap Preview Mobile Order PDF to inspect the readable order copy before sending. The PDF includes the company information from Settings, order/customer information, item details, quantities, prices, notes, totals, and the saved Mobile Order disclaimer. Longer orders can continue onto additional pages.

12. Mobile Order PDF

Feature	What it means
Company area	Company Name, Address, City, State, and ZIP from Settings.
Order area	PO, order type, date, customer information, and order notes when present.
Item table	Item number, description, size/variant, quantity, price, line total, and line notes.
Totals	Order total calculated from the current order lines.
Footer	The user-defined Mobile Order Disclaimer from Settings.
Multiple pages	Long orders can flow to additional pages while retaining the document structure.

The PDF is intended to give the office a legible, human-readable copy of the same order data. It is particularly useful when the ERP cannot import the CSV, when the office wants a reference copy, or when a person needs to verify the imported order against a readable document.

13. Outbound CSV Profiles

Outbound File Profiles make the app usable with different receiving programs. A profile controls the exact CSV header name, column order, and the Order to CSV data field written into each column. Each order item becomes one CSV data row.

Available data fields for profiles

- Customer Number, Customer Name, Customer Address, Customer City, Customer State/Province, Customer ZIP/Postal Code
- PO Number, Order Type, Order Date, Order Notes
- Item Number, Size/Variant, Item Description, Quantity, Unit Price, Line Total, Item Notes, Order Total

Built-in Customer Order profile

The built-in Customer Order profile uses generic headers such as `customer_no`, `po`, `order_type`, `date`, `item`, `item_size`, `item_description`, `item_quantity`, `item_price`, `item_notes`, and `order_notes`. Profile header names are fully customizable to match the receiving system.

Creating or editing a profile

Settings > Outbound Order File > Manage File Profiles allows profiles to be created, duplicated, edited, reordered, made default, or deleted when more than one profile exists. The Create section offers three starting points described below. In the profile editor, enter the exact CSV header required by the receiving system, choose the Order to CSV data written to that column, and arrange columns in the required order.

Create from Default Profile

Creates a new profile by copying the currently selected default profile. Use this when the new receiving format is similar to the format you already use and only needs a few changes to header names, mapped fields, or column order.

Create Simple Profile

Creates a basic generic order profile with common customer, PO, date, item, quantity, price, item-note, and order-note fields. Use this when you want a clean starting point instead of copying the current default profile.

Add Built-In Customer Order Profile

Adds a fresh copy of the app's built-in Customer Order profile and makes the new copy the default. Use this to restore a standard starting profile if the original built-in profile was deleted or heavily modified.

Compatibility: Order to CSV can generate configurable CSV files, but it does not guarantee compatibility with every ERP or accounting system. The receiving system must support importing the chosen structure. Test a profile with the home office before depending on it for production orders.

14. Saving, Sharing, and Emailing

Save Draft

Save Draft stores the order in Recent Orders with Draft status. It can be reopened and edited later.

Save / Share CSV + PDF

This action opens the iOS Share Sheet with both the CSV and Mobile Order PDF. Choose Save to Files to store them in iCloud Drive or another Files location, or choose another compatible app or destination. Saving/sharing this way does not automatically force the order to Sent; the app preserves the appropriate order status.

Email Order CSV + PDF

The email action creates a message with both files attached. The saved default recipient is prefilled when available and can be changed. If Apple Mail is not configured, choose Share Instead to use another compatible app such as Outlook or Gmail.

After a successful action

Done returns to the main Order to CSV screen. Start New Order clears the active order and starts a fresh order with a new automatically generated PO.

15. Recent Orders, Status, and Editing

Status	Recommended meaning
Draft	Work in progress. Draft orders can be edited.
Sent	The order has been transmitted or shared. It is locked from editing until changed back to Draft.
Imported	The office has marked the order as accepted/processed. It is locked from editing until changed back to Draft.

Edit an existing order

1. Open Recent Orders and select the order.
2. If the order is Sent or Imported, change its Status to Draft.
3. Tap Edit Order.
4. Make the required changes to customer, PO, order type, date, notes, items, quantities, sizes, prices, or line notes.
5. Tap Review Order and verify the current edited version.
6. Save Draft or transmit the corrected order as appropriate.

Editing updates the same saved order rather than creating a duplicate. The existing PO stays in place unless the user edits it manually.

Deleting Recent Orders

Recent Orders can be deleted individually or cleared from the Recent Orders menu. This affects only the app's saved order history. CSV and PDF files that were already saved, shared, or emailed outside the app are not deleted by clearing Recent Orders.

16. Recommended Company Workflow

1. Home office exports current customer and item CSV files. Item numbers are checked for uniqueness; barcode values are included when available.
2. The company creates and tests the outbound CSV profile against the receiving ERP or order system.

3. The salesperson imports the customer and item files on the iPhone or iPad and confirms the counts in Data Information.
4. During customer visits or sales activity, the salesperson creates orders, scans/searches items, enters quantities and pricing, and types or dictates notes.
5. Before sending, the salesperson reviews the order and previews the PDF.
6. The CSV and PDF are sent to the home office together.
7. The home office imports the CSV when supported and uses the PDF as a readable reference. If import is not supported, the PDF can be used for manual entry.
8. The order status is updated to Sent and then Imported as it moves through the company process. Corrections are made by returning the order to Draft and editing it.

17. Best Practices

- Test each outbound CSV profile with the receiving system before relying on it for live orders.
- Keep customer and item catalogs current; re-import updated files when the office changes pricing, items, addresses, or barcodes.
- Always use unique Item Numbers.
- Preview the Mobile Order PDF and review totals before sending.
- Use the PDF as a readable reference even when the CSV is imported automatically.
- Keep important CSV and PDF files according to the company's normal backup and record-retention policy.
- Treat Sent and Imported orders as locked records; return one to Draft only when a correction is intentionally required.
- Do not assume every ERP accepts the same CSV layout; use the documented import requirements from the receiving system.

18. Troubleshooting

Problem	What to check
CSV will not import	Confirm the file has a header row, the file is a valid CSV, and all required fields are mapped. For item files, verify Item Numbers are unique.
Create New Order is disabled	Import or add at least one customer and at least one item so both catalogs exist.
Customer cannot be found	Search by more of the customer name, number, or city. Confirm the current customer catalog is the expected one.
Item cannot be found	Search with more of the Item Number or Description. Confirm the item exists in the active catalog.
Scanner cannot find an item	Confirm Barcode/Scan Code was mapped during import or that the scanned value exactly matches the Item Number.

Scanner does not open	Enable Camera access for Order to CSV in iOS Settings and test on a physical device with a camera.
Sent/Imported order cannot be edited	Open the order and change Status to Draft; then tap Edit Order.
Added item is not shown during an edit	Use the current app version; the v1.5.12 fix ensures Review Order shows in-progress edits before saving.
Apple Mail is not configured	Use Share Instead and choose another compatible mail or sharing app, or save the files to Files.
ERP rejects the CSV	Compare the profile header names, column order, data mappings, date/number expectations, and required fields with the ERP import specification.
PDF shows wrong company/disclaimer	Open Settings, update Company Information or Mobile Order Disclaimer, save the changes, and preview the PDF again.

19. Frequently Asked Questions

Does Order to CSV connect directly to every ERP?

No. It creates a configurable CSV that can be imported when the receiving system supports that structure. Integration depends on the ERP's own import capability.

Can the app still be useful if our ERP cannot import CSV orders?

Yes. The Mobile Order PDF provides a clear, legible order that the office can use for manual processing.

Can a salesperson change the automatically generated PO?

Yes. The entire PO field is editable.

Can prices or sizes be changed on the order?

Yes. Size/Variant and Price are editable after an item is added.

Can notes be dictated?

Yes, when iOS dictation is enabled and available on the device keyboard. Dictation is an iOS keyboard feature rather than a separate app transcription service.

Can a Sent order be corrected?

Yes. Change the order status back to Draft, tap Edit Order, make the correction, review, and save/send again.

Does editing a saved order create another copy?

No. The current workflow updates the same saved order ID.

Are catalog imports appended?

No. A successful customer import replaces the active customer catalog; a successful item import replaces the active item catalog.

Will clearing Recent Orders delete files already emailed or saved?

No. It only removes the app's Recent Orders history.

Why require unique Item Numbers?

Item Number is a primary identifier used for search and order matching. Duplicates can make the wrong item appear or be selected.

20. Default Customer Order CSV Profile

The built-in Customer Order profile currently uses the following generic headers. A company may create or edit profiles when its receiving system requires a different layout.

Default CSV header	Order to CSV field
customer_no	Customer Number
po	PO Number
order_type	Order Type
date	Order Date
item	Item Number
item_size	Size / Variant
item_description	Item Description
item_quantity	Quantity
item_price	Unit Price
item_notes	Item Notes
order_notes	Order Notes

21. Final Reminder

Order to CSV is intended to make mobile order capture clearer and easier to process. The strongest workflow is to combine the structured CSV with the readable PDF, verify each order before transmission, keep catalog data current, and use the receiving ERP's documented import requirements when configuring outbound profiles.

Operational principle: CSV when the office can import it. PDF when a person needs to read it. Send both together so the office has structured data and a clear reference copy.