

Export Cart to Excel

Overview

An Export to Excel button can be added in the shopping cart to allow users to have their cart contents emailed to them in an Excel file. The file will include a product image for each cart item, if available. This feature is useful for customers who do not want to check out immediately but need a record of their cart's contents.


The out-of-the-box solution provides a [default Excel template](#). All you have to do to enable the feature is add the Excel Export Button widget to the Cart template. You can also choose to use a custom-designed Excel template. This alternative requires consultation with Commerce Vision.

How it works

Your Website User has added products to their Cart. While in the Cart page, they do not want to checkout and place their order immediately. They can select the Export to Excel button instead to have a record of the cart contents emailed to them. They simply select the 'Export to Excel' button. (**TIP** - You can rename this button if you like.)

The screenshot shows a shopping cart page with the following elements:

- Shopping Cart Header:** Includes a shopping cart icon, the title "Shopping Cart", and a note "Please review your cart before checkout." Below this is a navigation bar with links: Home > Cart, Notify Me When In Stock, Save As Template, Total Order, Update Order, Remove All, and Request Quote.
- Product List:** A table with columns: Product, Qty, Price (inc GST), Unit, and Total (inc GST).

| Product | Qty | Price (inc GST) | Unit | Total (inc GST) |
|---|-----|-----------------|------|-----------------|
|  uni-ball 207 Retractable Gel Pen, Medium Code: C1248 Out Of Stock Colour: Black | 100 | \$15.95 | DOZE | \$1,595.00 |
- Fast Order Entry:** A section with input fields for Product Code, Qty, and Notes, and an "Add To Cart" button.
- Have A Promo Code?:** An input field for "Enter Code Here" and an "Apply Code" button.
- Summary:** Subtotal (inc GST) \$1,595.00; Total (inc GST) \$1,595.00; Includes GST of \$145.00.
- Buttons:** "Keep Shopping", "Continue To Checkout", "Export To Excel" (highlighted with a red arrow), and "Request Quote".

In the popup dialog, they enter their email address and confirm they want the email sent.

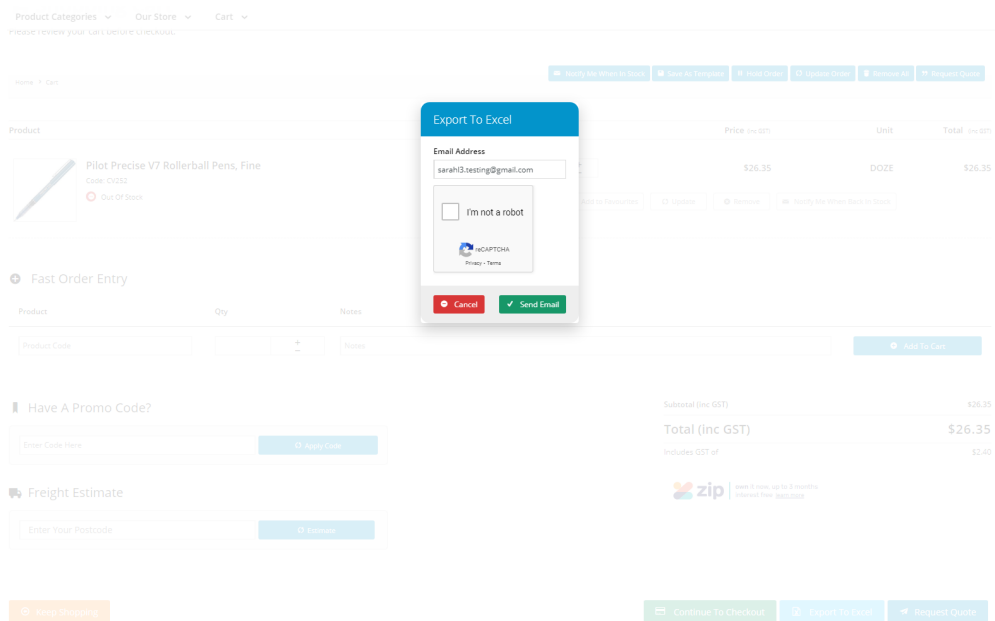


Captcha

You have the option of adding a reCAPTCHA v2 check in the dialog to prevent spam and abuse. If present, the User will be subject to reCAPTCHA's checking process.

Depending on risk assessment results, they will be asked to:




- tick the "I am not a robot" checkbox,
- tick the "I am not a robot" checkbox and complete a challenge, or
- do nothing, with the request validated in the background.



An email with the attached Excel file of cart contents is sent. The default image of each product is included, if available. **NOTE** - If a product image is not available (e.g., no image or incorrect path), an 'image unavailable' message is shown against the product.

2 https://430.commerce.vision

3

| 4 Product | Description | Stock Code | Qty | Price | Unit | Discount | Total |
|---|---|------------|-----|---------|------|----------|----------|
|  | Pilot Precise V7 Rollerball Pen, Fine | CV252 | 6 | \$26.35 | DOZE | 0 | \$158.04 |
|  | Pentel R.S.V.P. Ballpoint Pen, Fine | CV372 | 6 | \$9.99 | DOZE | 0 | \$59.94 |
|  | BC Velocity Retractable Ballpoint Pen, Medium Point | CV221 | 6 | \$14.99 | DOZE | 0 | \$89.94 |



Images can be resized in Excel (or equivalents such as Google Sheets).

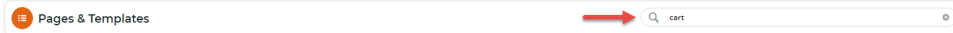
Step-by-step

NOTE - These steps are for the out-of-the-box version only. For the custom solution, please contact Commerce Vision.

To enable this feature, the **Excel Export Button Widget** has to be added to the Cart template. In the widget, you can customise the text displayed on the button, popup dialog and email message. You can also add and configure the reCaptcha service.

1. Navigate to **Contents Pages & Templates**.

2. Use the **Search** tool to find the **Cart** template.



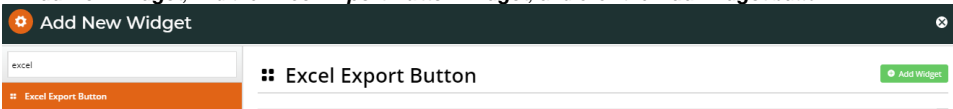
3. Click **Edit**.



4. In the zone you want the **Export to Excel** button to display, click **Add Widget**. (In the example, it has been added in Zone: BottomAfter, where it will display in the [bottom right corner of the Cart page](#).)



5. In **Add New Widget**, find the **Excel Export Button Widget**, and click the **Add Widget** button.



6. The **Excel Export Button Widget** will automatically open. Configure the widget as you require. Refer to [Excel Export Button Widget help](#) for assistance on customising each field.

7. Once you have finished, the **Export to Excel** button will be displayed in the **Cart** page.



You can easily change the button's location in the **Cart** page by dragging and dropping the button to the required position in a zone.

Additional Information

| | |
|---|------------------------------|
| Minimum Version Requirements | 4.31 |
| Prerequisites | -- |
| Self Configurable | Yes. No for custom solution. |
| Business Function | Orders |
| BPD Only? | Yes |
| B2B/B2C/Both | Both |
| Ballpark Hours From CV (if opting for CV to complete self config component) | Contact Commerce Vision |
| Ballpark Hours From CV (in addition to any self config required) | Contact Commerce Vision |
| Third Party Costs | n/a |
| CMS Category | Orders |

Related help

- [Auto-update Order Lines in Cart](#)
- [Sales Tax Settings](#)
- [Cart Functions & Settings](#)
- [Checkout Functions & Settings](#)
- [Localisation Settings](#)
- [Cart Retention Settings](#)
- [Back In Stock Notifications](#)
- [Enable the Sale and Display of Zero-Priced Items](#)
- [Most Popular Products](#)
- [Integration for AddToCart functionality](#)

Related widgets

- [Excel Export Button Widget](#)