Download Orders From Premier's Web Site

You can download orders that have been completed and shipped on Premier's web site since 9/1/2017. Follow these instructions for downloading your orders into your Hood & House software.

1. Make sure you are connected to the internet.
2. Open your Hood & House software and click on "**Orders**" on the left side of the screen.
3. In the bottom right corner, click the red button labeled "**Download Orders From Premier**".
4. A new window will open. Enter the email address that you have registered with Premier.
5. Enter your **password** (the same one you use to log into your portal on Premier's web site).
6. The **date range** is automatically set for 9/1/2017 through today's date. You can modify this range – but 9/1/2017 is the earliest beginning date.
7. Click the button labeled "**Download Orders**".
8. You will see a red message - "Connecting – Please Wait". The software is connecting to Premier's web site (using your login) and retrieving the orders within your specified date range.
9. When it is finished, the screen will display the data as downloaded from Premier. This screen is divided into 3 sections and the 3 sections are interrelated.
   a. The top section (shaded pink in image below) - "**Orders**" – gives the general information about the order – including what type of order it is (Personal, Individual, Group or Exchange). As you scroll or move through the orders, the data in the middle section will change to match whichever order is selected. When a Group order is selected, the Event Date, Name and Hostess will be shown above the top section.
   b. The middle section (shaded green in image below) – "**Order Forms**" – list each customer order form. Only Group orders would have more than one customer order form. As you scroll or move through the customer order forms, the data in the bottom section will change to match whichever customer order is selected.
   c. The bottom section (shaded yellow in image below) – "**Items**" – list the items purchased by each customer.
10. When the data is imported, the software will try to match the customers with your existing customers. If an exact match is not found, a new customer will be created. However, before you click the Import button, you have the opportunity to change/select the customer IDs in the middle section of the screen. You can use the drop-down button in the Customer ID to reveal the list of your current customers to select from. You can also type directly in the Customer ID field.
11. Before you import the data, you must select the orders you want to import. You can use the "**Mark All**" button or you can individually select (or unselect) orders by clicking the checkbox in the left of each row. If you manually entered an order previously, you do not want to import that order – this would create duplicate and give you incorrect information. If you try to import an order more than once, the software will notify you that the order already exists and will not re-import that order.
12. The last step is to click the "**Import Selected Orders**" button. After, clicking this, you will see "Please Wait – Transferring Data" near the top of the window. When it is finished, you will see "Process Complete" at the top of the screen. You can close this window and view the imported orders in the All Orders Window.

Download Orders From
Premier's Web Site

select	orderId	orderStatus	orderType	submittedDateTi...	jewelerId	orderTaxTotal	shippingTotal
☐	600539	Completed	Group	11/4/2017	3125	37.59	36.00
☐	776141	Completed	Group	11/20/2017	3125	10.89	12.00
☐	854350	Completed	Group	11/28/2017	3125	188.65	82.00
☐	993289	Completed	Group	12/10/2017	3125	39.11	27.00
☐	899684	Completed	Group	11/30/2017	3125	70.29	32.00

ORDER FORMS

orderFormId	CustomerID	customerName	custFirstName	custLastName	orderFormName	totalAmount	orderTaxRate
1595120	Doe, Jane	Jane Doe	Jane	Doe	3125	85.00	.08250
1595121	Hood, Miranda	Miranda Hood	Miranda	Hood	Free	9.00	.08250
1595122	Hood, Miranda	Miranda Hood	Miranda	Hood	Retail	6.00	.08250
1595124	Smith, Sue	Sue Smith	Sue	Smith	3125	177.00	.08250

ITEMS

lineItemID	lineItemNumb...	lineItemQuanti...	retailPrice	jewelerCost	customerPrice
5087895	50143	1	29.00	14.50	29.00
5087896	20501	1	37.00	18.50	37.00
5087898	31074	1	19.00	9.50	19.00

Correcting Customers After Importing

There are 3 new options for correcting customers in your Hood & House software. On the Customer Order Form and in the Customer List edit.

1. There is a new button on the Customer Order Form located at the top of the window near the Customer name and address. The button is labeled "Change Customer". When you click the button, it brings up the list of your customers for you to select a different customer. You can also add a new customer here.
2. There is a new "merge customers" option.
   a. From the main screen, you can click the orange "Customers" button to bring up your list of customers.
   b. Find the customer you want to merge with another customer (this is the one you want to get rid of). Click on the customer to bring up the edit screen.
   c. There is a new yellow button labeled "Merge With Another Customer" near the top of the window. Click this button and a new window will open showing your selected customer ID at the top of the window and a list of all your customers.
   d. Find the customer you want to merge to and double click on them. This will merge the purchases, wish list, relatives, contacts and categories of the 2 customers together and then delete the original customer.

Download Orders From
Premier's Web Site

3. Copy shipping address to customer address option. On the customer and hostess order forms, there is a blue button on the Shipping & Tax Rate tab (just below the address). The button is labeled "Copy Shipping Address to Customer Address". When you import the orders from Premier's web site, you are given the shipping address for each customer order. If the customer selected a Direct shipment method, the shipping address would be her address and you could use this button to populate the customer address in your data. If the customer selected Ship to event location, you probably would not use this (unless you are on the Hostess order form).