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Purchase Order Importer

Overview

The Purchase Order Importer is a routine that runs from the custom menu pad to import purchase orders from an ASCII comma delimited file. Our point and click field mapping wizard allows you to import files with various field layouts. The option grid allows you to choose purchase order defaults for fields not contained in your import file.

Installation

Extract the POIMPORT....ZIP file into the root of your Pro Series directory

Add a Custom Menu Option for Purchase Order Importer

1. Go into System Manager.
2. Maintain – Setup - System Installation.
3. Click on the Custom button.
4. Click on Edit and add a custom menu option with Menu Text of SO Importer and a command line of DO IMPORTPO. (If you only want specific users to have this available, add the menu option to each user in User Maintenance.)
5. Save the changes, exit Pro Series and then run Pro Series again.

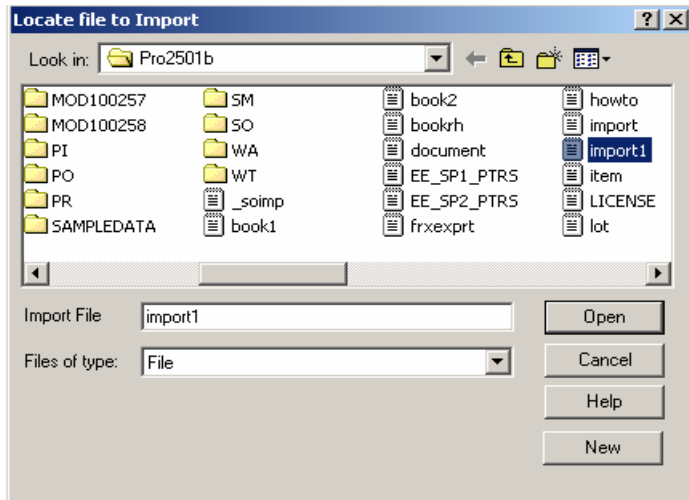
Purchase Order Importer

Using the Purchase Order Importer

Choose the Purchase Order Importer from the Custom Menu Option. You must be in the Purchase Order Module to run this routine.

Import File

Select the file to import. The file needs to be a comma delimited text file.



Mapping Wizard

You will then be prompted with the following screen where you will map the fields in your text file to the associated Pro Series Purchase Orders fields. The fields you do not have in your text file will be defaulted from the item, the vendor, or system defaults. For example, if you do not have an item description in your import file the description from the item as set up in Pro Series will be used.

The first time running the Purchase Order Importer, the field mappings will all be blank. After clicking on Save, the field mappings will be saved for the next time the Importer is run. If it is desired to clear all the field mappings, click on the Clear Form button.

Purchase Order Importer

Purchase Order Header Fields

Purchase Order Import Wizard

Clear Form

Header | Detail | RemitTo

Import Field #	Field Key	Import Field #	Field Key
FIELD1	<=> Vend # (Required)		<=> Type
FIELD2	<=> Purchase Order #		<=> Ship Via
	<=> Entry Date		<=> FOB
	<=> Required Date		<=> Confirm To
FIELD1	<=> Buyer		<=> Terms
FIELD2			<=> Comments
FIELD3			
FIELD4			
FIELD5			
FIELD6			

Purchase Order Detail (Line Item) Fields

Purchase Order Import Wizard

Clear Form

Header | Detail | RemitTo

Import Field #	Field Key	Import Field #	Field Key
FIELD4	<=> Item (Required)		<=> Req No
	<=> Quantity (Required)		<=> Dept
	<=> Vendor Part # (Required)		<=> Taxable
FIELD1	<=> Description		<=> Item Acct
FIELD2	<=> Cost		<=> Disc Rate
FIELD3	<=> Location		
FIELD4	<=> Unit of Measure		
FIELD5	<=> U/M Factor		
FIELD6			

Purchase Order Importer

Purchase Order Remit To Fields

Purchase Order Import Wizard

Clear Form

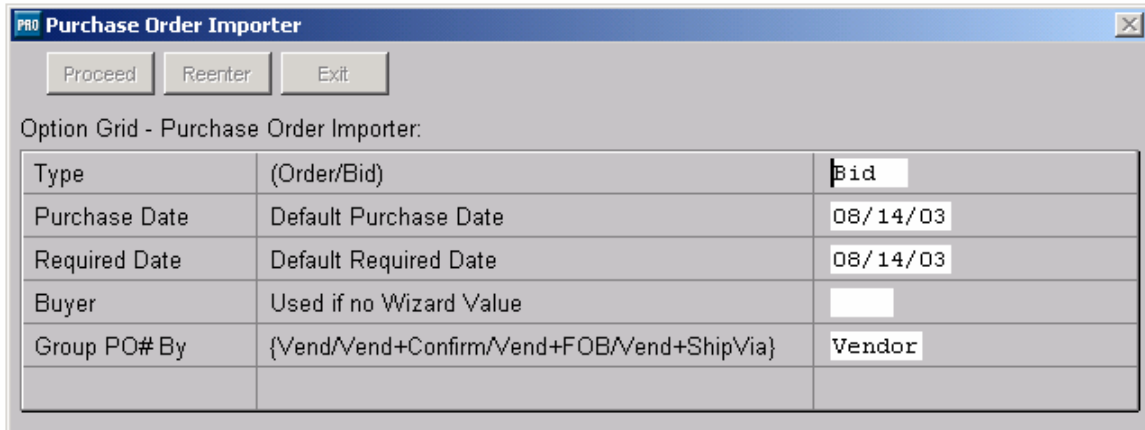
Header | Detail | RemitTo

Import Field #	Field Key
<input type="text"/>	<=> RemitTo #
FIELD5	<=> RemitTo Company
FIELD6	<=> RemitTo Address1
<input type="text"/>	<=> RemitTo Address2
<input type="text"/>	<=> RemitTo City
<input type="text"/>	<=> RemitTo State
<input type="text"/>	<=> RemitTo Zip
<input type="text"/>	<=> RemitTo Cour

Purchase Order Importer

Option Grid

After the wizard, the following option grid is what you will fill in next. These are the defaults that will be used if you do not have the fields in your import file or some of the fields you mapped may be empty for some orders. If any of the option grid options are blank, the Pro Series defaults will be used.



Type	(Order/Bid)	Bid
Purchase Date	Default Purchase Date	08/14/03
Required Date	Default Required Date	08/14/03
Buyer	Used if no Wizard Value	
Group PO# By	{Vend/Vend+Confirm/Vend+FOB/Vend+Ship/Via}	Vendor

Errors During the Import

A preprocessing is done on the import file before any purchase orders are created. You will be presented with an error log listing the errors that need to be corrected before attempting the update again. The scenarios that will generate errors are as follows:

- Vendor # Not Found
- Payment Terms Not Found
- Invalid Entry Date
- Invalid Required Date
- PO # already exists
- Invalid Item #
- Invalid Location ID
- Item Not Found at Location
- Invalid Buyer
- Remit To # Not Found
- Invalid Unit of Measure
- Invalid Item Account Number



Purchase Order Importer

Technical Information

IMPORTPO.DBF	Table to hold field positions of last import
IMPORTPO.FRX/FRT	Custom report for import error log
IMPORTPO.PRG/FXP	Purchase Order Importer Main Program
IMPORTPO.SCX/SCT	Purchase Order Importer Main screen

Have a question or a problem? Please have Reseller contact Data Developers Plus, Corp. at techsupport@ddpcorp.com or 1-877-238-0436.