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# Sales Order Importer

## Overview

The Sales Order Importer is a routine that runs from the custom menu pad to import sales 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 sales order defaults for fields not contained in your import file.

## Installation

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

### Add a Custom Menu Option for Sales 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 IMPORTSO. (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.

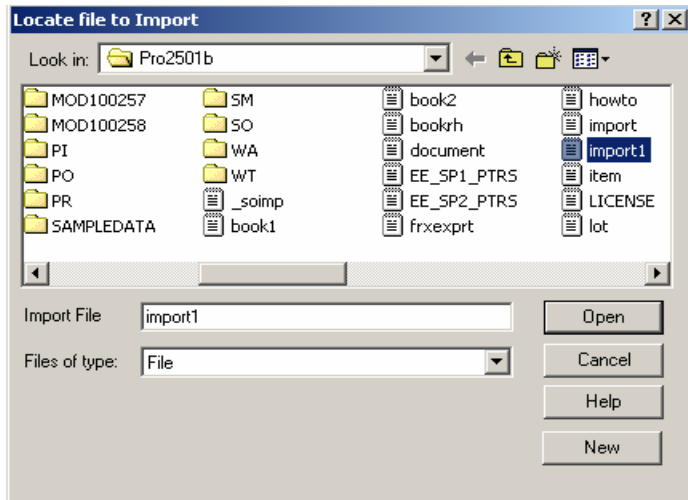
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## Using the Sales Order Importer

Choose the Sales Order Importer form the Custom Menu Option. You must be in the Order Entry Module to run this routine.

### *Import File*

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



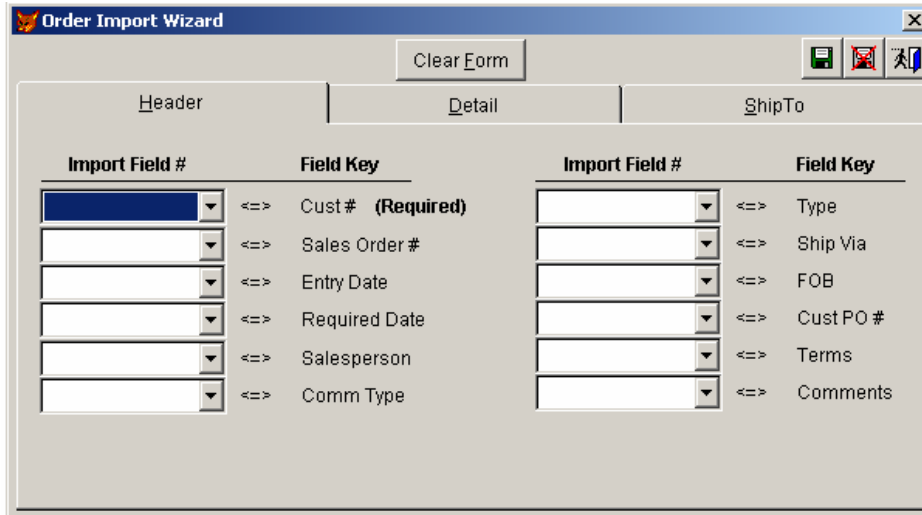
### *Mapping Wizard*

You will then be prompted with the following screen where you will map the fields in your text file to the associated Pro Series Sales Orders fields. The fields you do not have in your text file will be defaulted from the item, the customer, 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 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.

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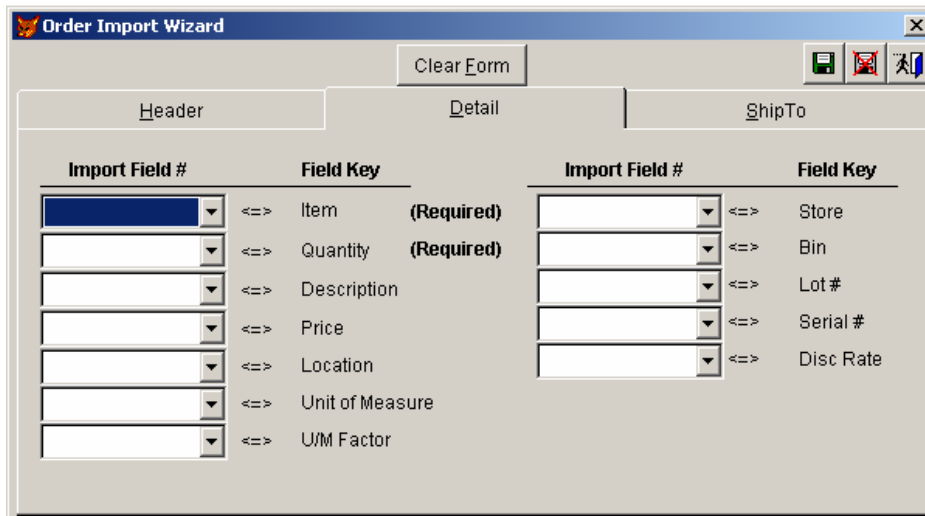
## Sales Order Header Fields



The screenshot shows the 'Order Import Wizard' window with the 'Header' tab selected. It features a 'Clear Form' button and three tabs: 'Header', 'Detail', and 'ShipTo'. The 'Header' tab contains two columns of fields for mapping 'Import Field #' to 'Field Key'.

Import Field #	Field Key	Import Field #	Field Key
<input type="text"/>	<=> Cust # <b>(Required)</b>	<input type="text"/>	<=> Type
<input type="text"/>	<=> Sales Order #	<input type="text"/>	<=> Ship Via
<input type="text"/>	<=> Entry Date	<input type="text"/>	<=> FOB
<input type="text"/>	<=> Required Date	<input type="text"/>	<=> Cust PO #
<input type="text"/>	<=> Salesperson	<input type="text"/>	<=> Terms
<input type="text"/>	<=> Comm Type	<input type="text"/>	<=> Comments

## Sales Order Detail (Line Item) Fields

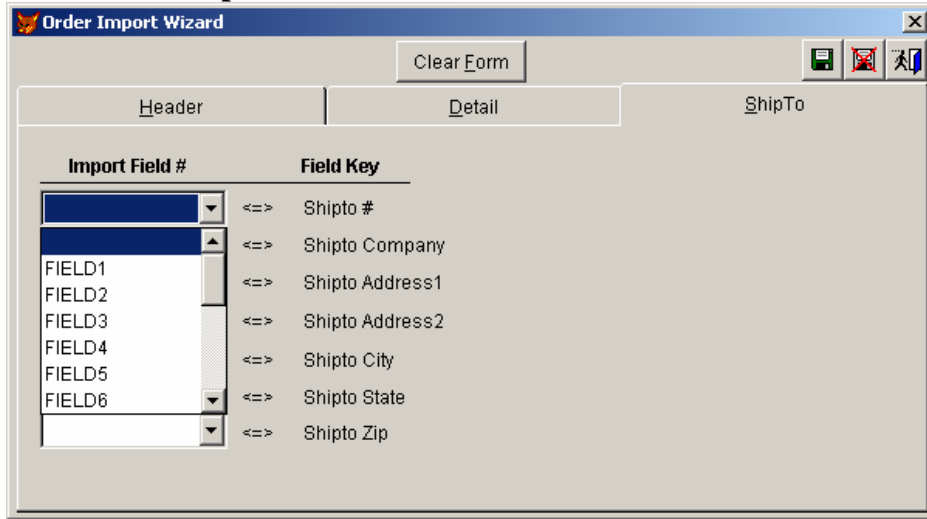


The screenshot shows the 'Order Import Wizard' window with the 'Detail' tab selected. It features a 'Clear Form' button and three tabs: 'Header', 'Detail', and 'ShipTo'. The 'Detail' tab contains two columns of fields for mapping 'Import Field #' to 'Field Key'.

Import Field #	Field Key	Import Field #	Field Key
<input type="text"/>	<=> Item <b>(Required)</b>	<input type="text"/>	<=> Store
<input type="text"/>	<=> Quantity <b>(Required)</b>	<input type="text"/>	<=> Bin
<input type="text"/>	<=> Description	<input type="text"/>	<=> Lot #
<input type="text"/>	<=> Price	<input type="text"/>	<=> Serial #
<input type="text"/>	<=> Location	<input type="text"/>	<=> Disc Rate
<input type="text"/>	<=> Unit of Measure		
<input type="text"/>	<=> U/M Factor		

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## Sales Order Ship To Fields



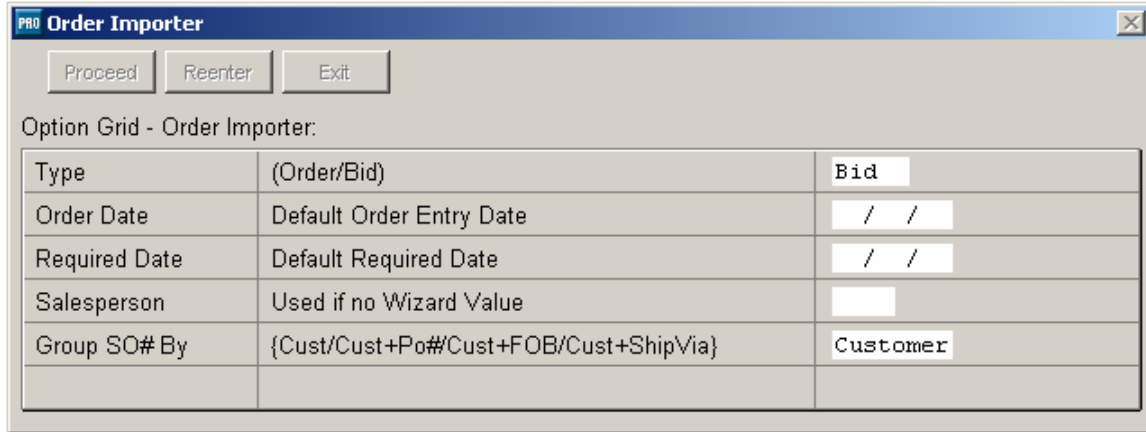
The screenshot shows a software window titled "Order Import Wizard" with a "ShipTo" tab selected. The window contains a "Clear Form" button and standard file operation icons. Below the tabs, there is a table for mapping import fields to system keys.

Import Field #	Field Key
	<=> Shipto #
	<=> Shipto Company
FIELD1	<=> Shipto Address1
FIELD2	<=> Shipto Address2
FIELD3	<=> Shipto City
FIELD4	<=> Shipto State
FIELD5	<=> Shipto Zip
FIELD6	<=>

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## 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.



The screenshot shows a window titled "PRO Order Importer" with three buttons: "Proceed", "Reenter", and "Exit". Below the buttons is the text "Option Grid - Order Importer:" followed by a table with the following data:

Type	(Order/Bid)	Bid
Order Date	Default Order Entry Date	/ /
Required Date	Default Required Date	/ /
Salesperson	Used if no Wizard Value	
Group SO# By	{Cust/Cust+Po#/Cust+FOB/Cust+ShipVia}	Customer

## Errors During the Import

A preprocessing is done on the import file before any sales 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:

- Customer not found in Pro Series or blank customer in import file
- Item not found in Pro Series or blank item in import file
- A 0 or negative quantity ordered in the import file



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## Technical Information

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

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