

Table of Contents

Overview and Installation	2
Using the Sales Order Importer	3
Mapping Wizard	
Option Grid	
Errors During Import	
Technical Information and Support	7

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. The 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

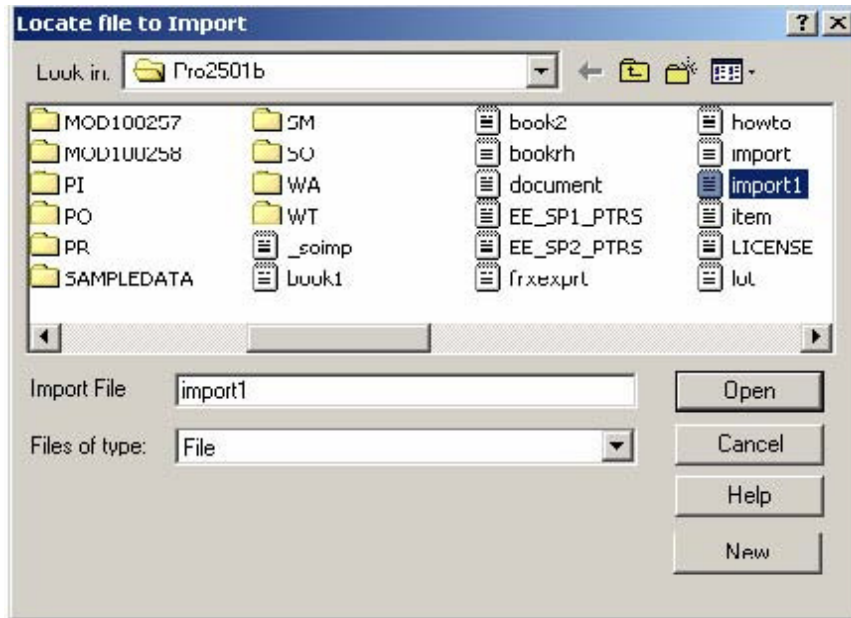
1. Open the System Manager.
2. Maintain - Setup - System Installation.
3. Click on the Custom button.
4. Click on Edit and add a custom menu option with Menu Text of SO Importer and a command line of DO IMPORTSO. (If you only want specific users to have this available, add the menu option to each user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

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 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.

Sales Order Header Fields

The screenshot shows the 'Order Import Wizard' window with the 'Header' tab selected. The window has a title bar with 'Order Import Wizard' and standard window controls. Below the title bar is a 'Clear Form' button and three icons (Save, Print, Help). The main area is divided into three tabs: 'Header', 'Detail', and 'ShipTo'. The 'Header' tab is active and contains two columns of field mappings. Each mapping consists of an 'Import Field #' dropdown, a double-headed arrow '<=>', and a 'Field Key' text field. The 'Field Key' text fields contain the following text: 'Cust # (Required)', 'Sales Order #', 'Entry Date', 'Required Date', 'Salesperson', and 'Comm Type' in the left column; and 'Type', 'Ship Via', 'FOB', 'Cust PO #', 'Terms', and 'Comments' in the right column.

Import Field #	Field Key	Import Field #	Field Key
[Dropdown]	<=> Cust # (Required)	[Dropdown]	<=> Type
[Dropdown]	<=> Sales Order #	[Dropdown]	<=> Ship Via
[Dropdown]	<=> Entry Date	[Dropdown]	<=> FOB
[Dropdown]	<=> Required Date	[Dropdown]	<=> Cust PO #
[Dropdown]	<=> Salesperson	[Dropdown]	<=> Terms
[Dropdown]	<=> Comm Type	[Dropdown]	<=> Comments

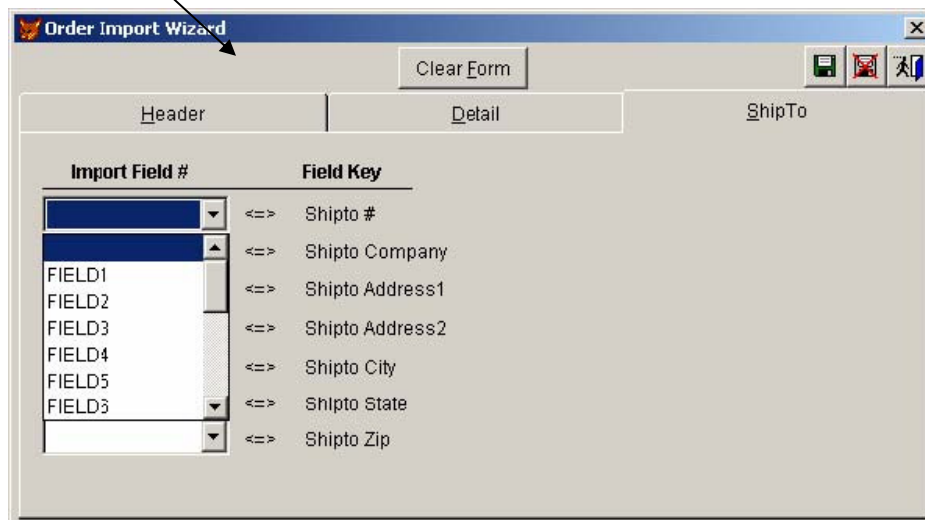
Sales Order Detail (Line Item) Fields

The screenshot shows the 'Order Import Wizard' window with the 'Detail' tab selected. The window has a title bar with 'Order Import Wizard' and standard window controls. Below the title bar is a 'Clear Form' button and three icons (Save, Print, Help). The main area is divided into three tabs: 'Header', 'Detail', and 'ShipTo'. The 'Detail' tab is active and contains two columns of field mappings. Each mapping consists of an 'Import Field #' dropdown, a double-headed arrow '<=>', and a 'Field Key' text field. The 'Field Key' text fields contain the following text: 'Item (Required)', 'Quantity (Required)', 'Description', 'Price', 'Location', 'Unit of Measure', and 'U/M Factor' in the left column; and 'Store', 'Bin', 'Lot #', 'Serial #', and 'Disc Rate' in the right column.

Import Field #	Field Key	Import Field #	Field Key
[Dropdown]	<=> Item (Required)	[Dropdown]	<=> Store
[Dropdown]	<=> Quantity (Required)	[Dropdown]	<=> Bin
[Dropdown]	<=> Description	[Dropdown]	<=> Lot #
[Dropdown]	<=> Price	[Dropdown]	<=> Serial #
[Dropdown]	<=> Location	[Dropdown]	<=> Disc Rate
[Dropdown]	<=> Unit of Measure		
[Dropdown]	<=> U/M Factor		

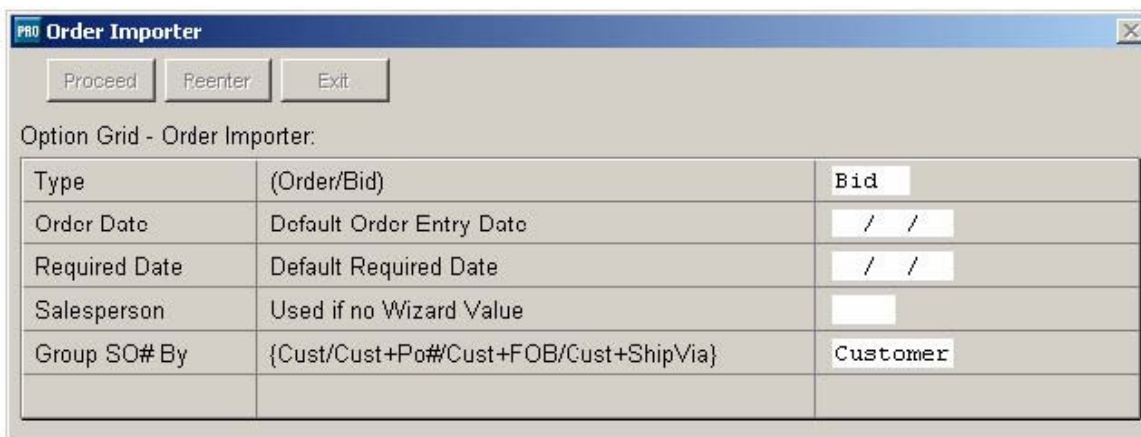
Note: The SO Importer has options to group by customer #, customer + PO, customer + FOB, customer + shipvia. The shipto is considered a part of customer # in all of these options.

Sales Order Ship To Fields



Option Grid

Upon completion of the mapping wizard the following option grid will be displayed for data entry. These are the defaults that will be used if the import file is blank or if some of the previously mapped fields are blank for some sales orders. Pro Series defaults will be displayed in blank option grid fields.



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 zero or negative quantity ordered in the import file.

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

Technical Support: support@ddpcorp.com • 702-487-9711 x303

Product specifications, availability and price are subject to change without notice.