

## Data Importers To Pro Series

Accounts Payable, Accounts Receivable, Customer Information,  
Inventory Items, Purchase Orders, Sales Orders

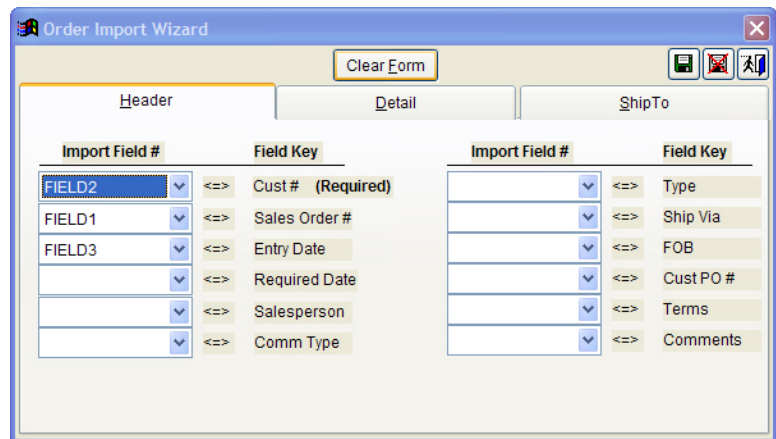
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### Workflow Benefits

A Data Import module eliminates mistakes and reduces the time required to port information from a comma delimited file into the accounting system. A data importer runs as a routine in Pro Series. Each importer has a point and click field mapping wizard to import files with various field layouts. An option grid provides flexibility to choose defaults for fields not contained in the source import file. The illustrations below outline the functionalities of the Sales Order Importer. These same functionalities are shared in the other data import modules.

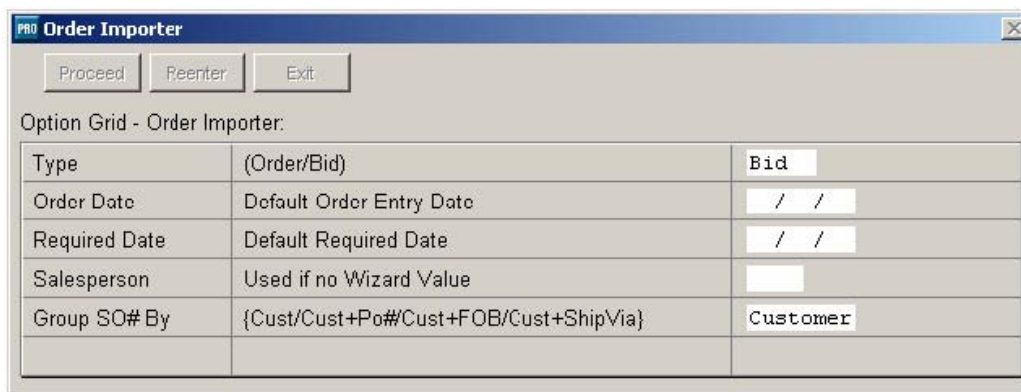
A comma delimited file is selected after the import module form is opened from the Custom Menu Option. The example on the right shows the mapping wizard for the Sales Order Importer which includes fields for the Header, Detail and ShipTo data.



Header		Detail		ShipTo	
Import Field #	Field Key	Import Field #	Field Key	Import Field #	Field Key
FIELD2	<=> Cust # (Required)		<=> Type		
FIELD1	<=> Sales Order #		<=> Ship Via		
FIELD3	<=> Entry Date		<=> FOB		
	<=> Required Date		<=> Cust PO #		
	<=> Salesperson		<=> Terms		
	<=> Comm Type		<=> Comments		

The option grid is used prior to completing the actual import to select defaults for information that is not included in the source file. A pre-validation routine ensures that the imported data includes valid customer and item numbers. Duplicate data such as order numbers are identified during the validation process.

The pre-validation routine will generate an error report if: 1) customer not found in Pro Series or blank customer in import file; 2) item not found in Pro Series or blank item in import file; 3) a zero or negative quantity ordered in the import file.



Option Grid - Order Importer:

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

The Sales Order Simplifier is compatible with Pro Series 5, 6, 6.5 and Sage Pro 7.x VFP & SQL  
The SO Simplifier installation does not require access or modification of Pro Series source code

[More Information](#)  
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Product specifications, availability and price are subject to change without notice.

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