

## Catalog Import Tools Transcript

Andrew:  
Did you hear?

Robert:  
What's that?

Andrew:  
We just signed with a new vendor, and we're going to have a lot of new products!

Robert:  
That's great! Have they sent us their catalog yet?

Andrew:  
I have the file, but I was hoping you could help me put it into Eagle.

Robert:  
Send it over, and we can run the catalog import.  
Pick a topic and we'll go over the details.

### Preparing the Import File

Before starting the import confirm your licensing and prepare your file to be processed.

Your business may have multiple catalogs to order from.

Eagle enables you to import, build, and maintain multiple catalogs and keep them separate from a co-op catalog.

These catalogs may be supplied by a vendor or customized to your business.

To use this feature, Epicor licensing must enable your system to allow multiple catalogues.

View Option ID# 1157 for details.

Enter the corresponding codes for the co-op catalogs, or numbers 1-5 for generic and custom catalogues.

If you need to authorize additional catalogs, contact Epicor licensing.

To import a catalog, first make sure that you've formatted the import file correctly, and then complete the import using Catalog Import Designer.

The most common file types to use are .xls, .csv, or .txt.

Be aware that Eagle cannot import a PDF type file, so make sure to ask for or convert one into a compatible file type.

Once you have the file available, review it in a spreadsheet to confirm that the fields and data are correct.

There are six fields that the Catalog Import Designer requires that you include while mapping the import file, so make sure they appear in the spreadsheet.

These fields are: SKU, Manufacturer, Department, Class, Finline.

Add them even if that means you place them into a single Department, Class, or Finline.

We recommend that if possible; link an accurate department to each item.

This way, if you sell an item from the catalog at point of sale, Eagle updates the correct department's sales history.

If you use the General Ledger on Eagle, it also updates the correct department's sales account.

If you later add any of these items into your inventory database, you can change the Department, Class, and Finline at that time.

Once your file has all the appropriate information, save it to a usable file type.

A best practice is to have a dedicated folder on your system to store **all** your catalog import files.

Your file is now ready to begin the import process using the Catalog Import Designer.

## Mapping the Import File

Use the Catalog Import Designer to begin the import process.

Click the Open button to choose your prepared catalog file.

Select the file and press Open.

Choose the proper Import File Type for the selected file. The example uses a .csv file.

If your spreadsheet contains multiple Records per SKU, adjust this field to reflect that.

The SKU Options give you the ability to adjust specific parameters about importing your file, such as dashes, spaces, or other characters. If your vendor includes these, but you don't, use the options to remove them.

You can add a prefix to the SKUs you import by entering up to three characters here.

Select Input to display the first rows of your selected file.

If the information displayed looks incorrect, you may have selected the wrong file type.

Confirm that you have the correct file type and press Input again.

If the first row in your spreadsheet contains headers, enable the Ignore first record option. This prevents Eagle from treating that row as a SKU.

You can now map your file's columns to fields for the import.

Select the Map field button and find the field to map.

Pressing a letter on your keyboard moves the selector to that letter.

Make your selection and press OK.

Enter the position of the column that contains the data for the field you are mapping. Press OK and the mapped field displays.

Here's a tip.

The Constant field is optional. When you enter a value here, Eagle replaces the data for the mapped field with the Constant value. A common use for this is to enter a value as a placeholder for Department, Class, and Finline fields.

It's important to complete the department field accurately. That way if you sell an item from the catalog at point of sale Eagle can update the correct department's Sales and General Ledger information accurately.

When mapping other fields, additional attributes may appear.

Repeat this process for each column you want to map.

Remember that your map must at least include these fields: SKU, Manufacturer, Department, Class, and Finline.

Your suppliers often provide catalog updates in the same format as the original file.

With this in mind, you can speed up the import process by saving a map you build for later use or load an existing one.

Remember to check updates for accuracy as you're preparing the file for import.

Use the Input and Output buttons to refresh the display, or swap between showing the file you're uploading and the Import Map that you're building.

Once you create and save your Import Map, you're ready to finish the import process.

## Completing the Catalog Import

Once your Import Map is complete, you're ready to import your catalog.

The process is the same whether you're adding a new catalog or updating an existing one.

Press the Import Icon to select the file or files you want to use.

You can import more than one vendor file at a time into the same catalog.

Note, if you're importing multiple files make sure that they're all formatted to align with the selected options and loaded import map.

Select Open to confirm your selection.

Once your Import Map is complete, you're ready to import your catalog.

The process is the same whether you're adding a new catalog or updating an existing one.

Press the Import Icon to select the file or files you want to use.

You can import more than one vendor file at a time into the same catalog.

Note, if you're importing multiple files make sure that they're all formatted to align with the selected options and loaded import map.

Select Open to confirm your selection.

Once you run the import, Eagle updates the catalog information immediately. Unlike other import tools, there is no report that you need to run to finalize the process.

Press Cancel and close the Catalog Import Designer.

When you're ready to view the imported data, select Catalog in the Eagle browser.

Select the Tools tab and choose Options.

Make sure you've selected the new catalog.

You can now search the new catalog by any of the displayed fields.

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