

UPC Code, Vendor, and Customer Import Tools

The Import tool lets you import data from a file such as a spreadsheet to the system. You can import data received from a vendor, or your own data from a viewer and you can modify it before importing.

Objectives

- Importing UPC Data
- Importing Vendor Data
- Importing Customer Data

Importing UPC Data

Items may have multiple UPCs. Using the UPC import will help you keep track of your inventory.

Ensure that *Option 73, Inventory Import* is enabled before starting an import process. Then set *option 1799, UPC Import* to Yes. After that, assign *Security Bit 1154* to the appropriate roles.

From the *Home* page, select *Data Import* and then choose *UPC Import Designer*. Click *Open* and select the file that contains your UPCs.

Choose *Input* to view the fields and then select the *Map Field* to map the SKU and the UPC columns. In the pop-up, select *SKU* and click *OK*. Use the *Position field* to indicate where the *SKU* should be added to the list and select *OK*. Follow the same procedure map the UPC.

If your file has headings for the columns listed on the first row, enable the *Ignore first record* check box. The system will skip that row and only import the SKU data.

Select *Import* to load the UPC changes.

Importing Vendor Data

A complete vendor file will help you keep your inventory and accounts payable information current. To import successfully, you need to map your data file with the fields in the system, aligning the data correctly between the two.

From the *Home* page, select *Data Import* and then choose *Vendor Import Designer*.

Select *Open* and choose the correct file. Select *Input* to view the fields to map.

Now select *Map Field* and identify the first field name. In this case, it's *Vendor Name*.

You must have a *Vendor Code Field* listed in your data file or the import will not work. Continue this process until you have mapped all the fields in your data file.

If the first row contains column names, select *Ignore first record*. Enter the store where you want to add the records. Select *OK*. Finally, choose *Import*.

Importing Customer Data

Similar to the vendor import, you can import a list of customers. First ensure that Option 3509 and security bit 733 are both set to yes. This allows users to access customer fields and edit the information.

The procedure is the same to add or update accounts whether using the *Vendor Import Designer* or the *Customer Import Designer*. However, *Customer Contact Import* is an alternative procedure to importing customer data. Let's look at how to add information using this method.

Select *Customer Contact Import*. The pop-up instructs you where to save the file on your computer. Note that you need to save this file in the .csv format.

The first three columns must contain the *Customer Number*, *Job Number*, and *Contact Name*. Take note of the word *Required* next to them. If the account is not a job account, you can leave the Job number field blank.

Select the file you saved from the drop-down menu next to *File for Import* and choose *OK*. In the confirmation pop-up, select *Yes*.

When the records load, the system shows the number of *Records Read* and the number of *Successful Updates*. Select *OK* to close the window.

Recap

Importing data can help you quickly update your system with relevant information. UPC, Vendor, and Customer Data imports help you keep your reporting complete and accurate.

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