

UPC Code, Vendor and Customer Import Tools Transcript

After viewing the Inventory Import Tools course, you know how easy it is to add or modify inventory. With Eagle Software Release 27.1 and higher, you can use that same method to add UPC codes, load vendors, and create customer records. Let's examine each procedure.

Sometimes items have multiple UPC's. Using the UPC code import will make sure your inventory stays organized. Before starting, ensure that you have Option 73, Inventory Import, enabled. Then set option 1799, UPC Import, to Yes, and assign Security Bit 11 54 to the appropriate roles.

From the Home screen, select Data Import and then UPC Import Designer. Click open and select the file that contains your UPC codes. Press Input to view the fields, and then select Map Field. You will need to map at least the SKU and the UPC Column. Enable the Ignore first record check box if your file has headings, and press Import. Select Import and the UPC changes will load.

Keep your inventory and accounts payable information up to date with a complete vendor file. When you are using Eagle Release 27.1 and higher, make sure that you set Option ID 1798 to Yes. From the Eagle Browser, select Vendor Import Designer from the Data Import menu. Select Open from the ribbon menu and choose the correct txt, csv, or xls file.

Press Input to view the fields to map. Now press Map Field and identify the first field name. In our example, it's Vendor Name. You must have a Vendor Code Field listed in your data file or the import will not work. Just like adding a vendor in Eagle, this can only contain five alphanumeric characters. Continue this process until you've mapped all of the fields in your data file.

If the first line contains column names, select Ignore first record. Enter the store or stores where the records will be added. Press OK. Select Import from the ribbon menu and follow Best Practice troubleshooting measures needed based on the information in the Log.

Just like with vendors, you can quickly import a list of customers into Eagle. Start by ensuring that Option 3509 and security bit 733 are set to yes. This allows users to access customer fields and edit the information. You can use the Customer Import Designer to add or update accounts and follow the same process as using the Vendor Import Designer.

However, you can also use the Customer Contact Import. Let's explore adding information using this method. The pop up window tells you the location in which to save your file. This is a path on your specific laptop or PC. Also, this file must be saved in the .csv format.

The first three columns have to contain the Customer Number, Job Number, and Contact Name. Notice the word Required alongside them here. If the account is not a job account, you can leave the Job number field blank. We provided an excel template for you in the Course Materials section of this class. Download it, add your data, and save it to your computer. Our path started at Local Disk C.

Then to the folder called 3thin, and then m101temp. Here, we can see that we saved our .csv file correctly. Select the file you saved from the drop-down menu next to File for Import, and select OK. When asked if you are ready to import the records, select Yes. When the records load, the system indicates the number of Records Read, and the number of Successful Updates. Select OK to close the window.

Importing data can help you quickly update your system with relevant information. By using the UPC, Vendor, and Customer Data Imports, you can make sure Eagle reporting is complete and accurate.

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