

# Importing Customer Catalog

## Customer Orders

- EZ Orders
- Load
- Create From Stock Status
- Create From Usage
- Create From Requests
- Create For Restock
- Bill Of Lading Print
- Edit
- Restore
- Inquiry
- Reports
- Line Audit Report
- Quoting
- Shipper Edit/Inquiry
- Requests
- Shipper Reports
- Shipper Item Label Print
- Acknowledgements
- Receiving
- Receiving (CO)
- Receipt Report

## Billing

- Load Invoice
- Invoice Edit
- Invoice Inquiry
- Invoice Reports
- Billable Trans. Reports

## Inventory

- Load
- Edit
- Copy
- Tool Notice Report
- Inquiry
- Stock Status Reports
- Historical Reports
- Adjustments
- Kanban

## Asset Management

- Work Orders
- Bill Of Materials
- Master Kits
- Machine Inventory
- Repair

## Transactions

- Load Disbursements
- Inventory Count With Usage
- Inventory Count With Adjust
- Inventory Count
- Edit
- Edit Receipts
- Edit Usage
- Review And Stamp Usage
- Usage Requests
- Inventory Transfers
- Location Transfers

## Miscellaneous

- Supplier Catalog
- Customer Catalog
- Mfg Catalog
- Manage Saved Reports
- Edit Login
- Administrative Functions
- Customer Inquiry

## Purchasing

- Edit
- Inquiry
- Receiving
- Receipt Review
- Acknowledgement
- Returns
- Reports
- Receipt Report
- Line Audit Report
- Sources Menu
- Buyer Load
- Buyer Edit
- Rfq Menu

## [Imports & Exports](#)



Click on Imports & Exports

# Importing Customer Catalog

## Imports & Exports

### Imports - Transactions

- Usage
- Inventory Count
- Inventory Count With Usage
- Inventory Boh Adjust
- Inventory Count With Adjust
- Inventory Item Type
- Inventory Repair
- Inventory Mdq Adjust
- Customer Requests (Catalog)
- Orders
- Order Shippers
- Order Receipts
- Order Acknowledgements
- PO Acknowledgements
- PO Receipts
- Work Orders
- Supplier Invoice

### Imports - Master Records

- Branch Inventory
- Supplier Catalog
- Manufacturers
- Manufacturer Catalog
- Cabinet Items
- Customer Catalog
- Purchase Sources
- Purchase Source Catalog
- Customer Requestors
- Customer Accounts
- Customer Departments
- Full Inventory import
- Customer Contracts
- [Full Remote Inventory](#)
- Kanban Items
- Machines
- Machine Inventory

### Exports

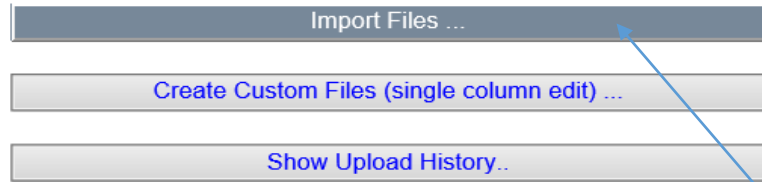
- Customer Order
- Customer Order Receipts
- Shipper
- Purchase Order
- Purchase Order Receipt
- PO Receipt Reviews
- Usage
- Supplier Invoices
- Customer Quotes
- Unstamp Exports

### Administration

- List Of Files
- Data Collection Forms
- Xml Administration
- Edi Administration
- Import Performance

Click on Customer Catalog

# Importing Customer Catalog



Click on Import Files

# Importing Customer Catalog

**IMPORT: Upload Full Remote Inventory File...**

Maximum file size of 128MB. Break up larger files into seperate uploads.

Select File:  Browse...

Import Mode:

- ADD AND CHANGE
- ADD ONLY
- CHANGE ONLY
- TEST ONLY
- DELETE ONLY

Upload & Process

System will add the prefix **FULLINV\_login\_yyyymmddhhmm\_** to the file name.

Available Columns & Formats

Select the import mode

1. Add & Change modifies existing records and adds missing records.
2. Add only will add the new items skipping items already on file.
3. Change only will edit existing records skipping new items.
4. Test Only will test the contents of your file without changing records
5. Delete only will remove any items selected.

# Importing Customer Catalog

**IMPORT: Upload Customer Catalog File...**

Maximum file size of 128MB. Break up larger files into separate uploads.  
Any file exceeding 1000 blank lines will be rejected.

Select File:

Import Mode: **ADD AND CHANGE** ▼

System will add the prefix **CUSTCAT\_login\_yyyymmddhhmm\_** to the file name.

AVAILABLE COLUMNS & FORMATS		
<b>IMMID</b>	A code that identifies the Indirect Material Manager in charge of this item (not needed if IMMID = SupplierID)	TEXT [50] ▲ ▼ ✕ ☑
<b>CustID</b>	A code that identifies the customer using this item	TEXT [50] ▲ ▼ ✕ ☑
<b>CustItemID</b>	The customers part number for this item	TEXT [100] ▲ ▼ ✕ ☑
<b>SupplierItemID</b>	The suppliers part number identifying the item	TEXT [100] ▲ ▼ ✕ ☑
<b>MfgID</b>	Manufacturer for this item	TEXT [50] ▲ ▼ ✕ ☑
<b>MfgItemID</b>	Manufacturer's item number for this item	TEXT [100] ▲ ▼ ✕ ☑
<b>SourceID</b>	Identies the source or vendor for this item	TEXT [50] ▲ ▼ ✕ ☑
<b>SourceItemID</b>	The source or vendors part number for this item	TEXT [50] ▲ ▼ ✕ ☑
<b>CrossRef</b>	A user defined part number used in looking up the item	TEXT [50] ▲ ▼ ✕ ☑
<b>SellPrice</b>	Price the customer is expected to pay for the item	DECIMAL ▲ ▼ ✕ ☑
<b>UnitCost</b>	Undiscounted cost for the item	DECIMAL ▲ ▼ ✕ ☑
<b>UnitCostDiscount</b>	A discount off of unit cost	DECIMAL ▲ ▼ ✕ ☑
<b>DiscountMethod</b>	Describes how the cost discount is calculated. P for percent	TEXT [50] ▲ ▼ ✕ ☑
<b>SellPriceMultiplier</b>	Multiplied by cost will calculate the sell price for the item	DECIMAL ▲ ▼ ✕ ☑
<b>PassThroughPricing</b>	Indicates this item has the same cost and sell price	TEXT [1] ▲ ▼ ✕ ☑
	A quantity that differs from the stock	

▲ Move column up. ▼ Move column down. ✕ Remove column. ☑ Remove all from here.

Uses default headers if not included in file.

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**GUIDELINES**

File must be tab-delimited text, each line ending in a carriage return & line feed. (Blank lines are ignored.)

The first line must be a header containing the appropriate columns. Any columns that do not match the ones listed here will reject the file. If you wish to ignore a column, either delete the column for the entire file or leave the header column blank. You may use the up, down & delete buttons in the column list to create a header to add to your file.

Columns can be placed in any order, and are optional unless mandatory for new items.

- Yellow fields** are mandatory for new items.
- magenta bordered fields** are keys -- required to identify the item.
- Green fields** for transactions or new master record items default to current date or time for date fields, 0 for quantity fields, or assigned by system (such as line numbers).
- Blue fields** are shown when choosing the REFRESH\_ALL function; all these columns must have identical values in the file.
- Underlined fields** are remote inventory identifiers.
- Gray fields** are ignored for existing items.
- A calculator** in a field indicates that the values are calculated by the system, either at transaction

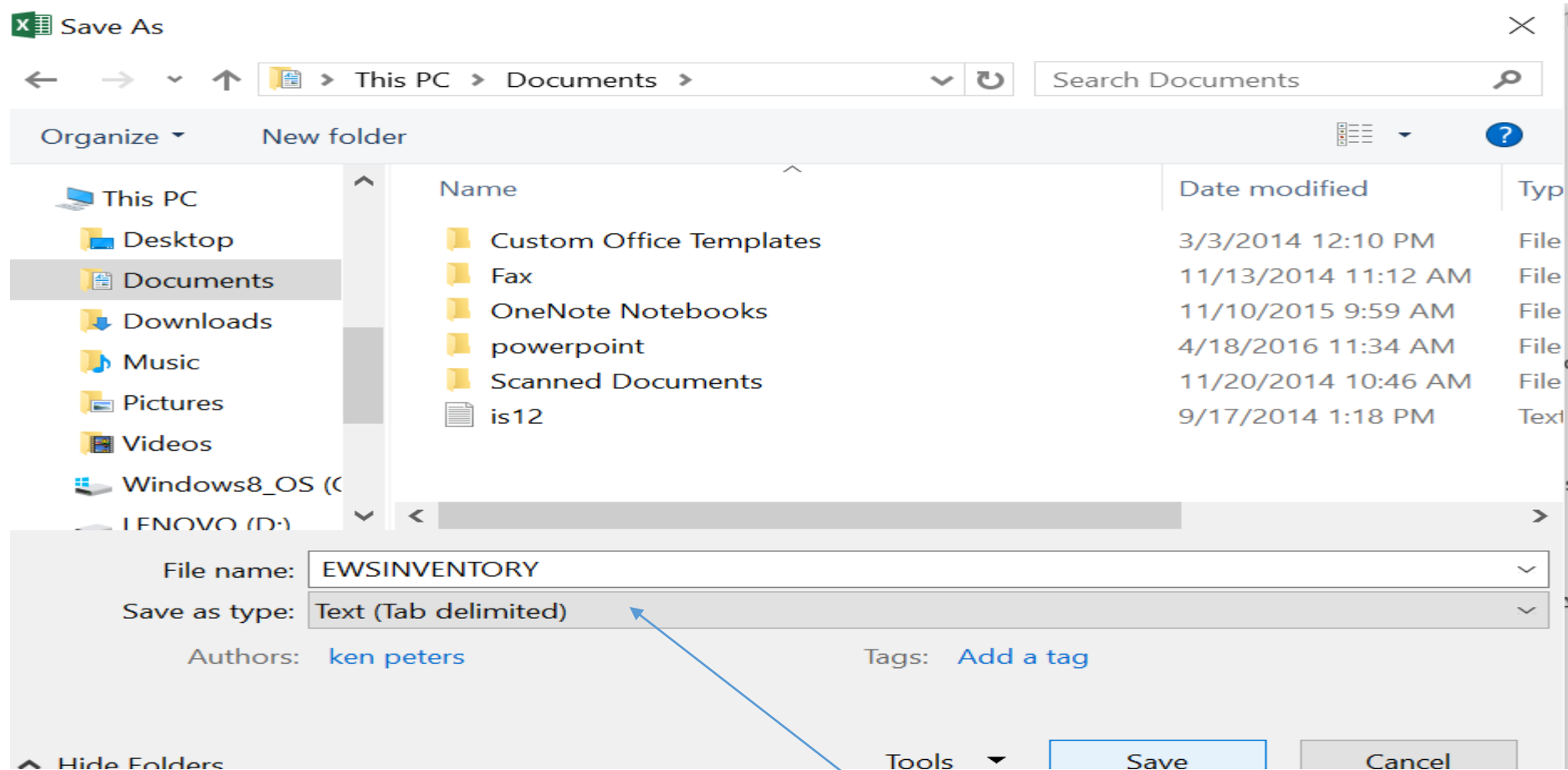
Scroll up and down to see all available data columns to use. The columns in yellow are always required when loading and editing data. IMMID is not required. All other columns are selected if needed. Use these column names to create a excel spreadsheet.

# Importing Customer Catalog

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P
1	CustID	Facility	Location	IPN	StockLocation	BOH	SupplierItemID	CustItemID	MfgID	MfgItemID	PrimaryBin	UOM	MinQty	MaxQty	SellPrice	ItemType
2	TEST1	0001	XFERMI	10001		10	ABCD1	10001	ACME, INC.	5678	A102	EA	5	10	23.34	M
3	TEST1	0001	XFERMI	10002		10	ABCD2	10002	ACME, INC.	5679	A102	EA	5	10	30.99	M
4	TEST1	0001	XFERMI	10003		10	ABCD3	10003	ACME, INC.	5672	A102	EA	5	10	23.34	M
5	TEST1	0001	XFERMI	10004		10	ABCD4	10004	ACME, INC.	5673	A102	EA	5	10	4.99	M
6	TEST1	0001	XFERMI	10005		10	ABCD5	10005	ACME, INC.	5674	A102	EA	5	10	23.34	M
7	TEST1	0001	XFERMI	10006		10	ABCD6	10006	ACME, INC.	5675	A102	EA	5	10	8.5	M
8	TEST1	0001	XFERMI	10007		10	ABCD7	10007	ACME, INC.	5676	A102	EA	5	10	23.99	M
9																

This is an example of a excel spreadsheet. All column names must match. CustID,.

# Importing Customer Catalog



Save the file as a tab delimited text file and save the file on your network named as you like.

# Importing Customer Catalog

Maximum file size of 128MB. Break up larger files into seperate uploads.

Select File:

Import Mode: **ADD AND CHANGE** ▼

System will add the prefix **FULLINV\_login\_yyyymmddhhmm\_** to the file name.

**File processed, ADD AND CHANGE mode: (7 rows imported, 7 good, 0 bad.)**

Browse and find your file and cluck Upload & Process  
You will be notified of success or failure of the upload

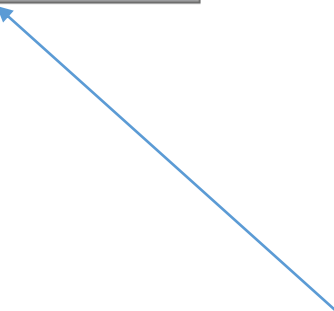


# Importing Customer Catalog

Import Files ...

Create Custom Files (single column edit) ...

Show Upload History..



To check for errors on the file click on Show Upload History

# Importing Customer Catalog

[Refresh Display](#)

	FileName	ImportMode	Imported	FileSize	TotalCt	GoodCt	BadCt	Status	Message	LogFile
1	<a href="#">FULLINV_ews_0719113203-14_EWSINVENTORY.txt</a>	ADD AND CHANGE	Jul 19 2016 11:32AM	697	7	7	0	PROCESSED		<a href="#">FULLINV_ews_0719113203-14_EWSINVENTORY.txt.log</a>

Click on corresponding file to list errors and issues

# Importing Customer Catalog

Customer Catalog Inquiry [012-11-600-10-BK]				
CUSTOMER	<input type="text" value="AIR"/>	AIR TECHNOLOGIES		
CUST. PART	<input type="text" value="012-11-600-10-BK"/>	SUPPLIER PART	<input type="text"/>	
Description	<input type="text" value="205654 10 HYFLEX ULTRA LGHTWEIGHT ASSEMBLY GLOVE"/>			
Long Description	<input type="text" value="HyFlex Lite offers maximum tactile sensitivity and dexterity"/>			
Sell Price	<input type="text" value="2.80"/>	UOM	<input type="text" value="PR"/>	
Product Class	<input type="text" value="Safety &amp; Security"/>	Product Type	<input type="text" value="Hand Protection"/>	
Department	<input type="text"/>	Account	<input type="text"/>	
Internal Notes	<input type="text"/>			
<b>MANUFACTURING INFO</b>				
MfgID	<input type="text" value="Ansell"/>	MfgItemID	<input type="text" value="012-11-600-10-BK"/>	
List Price	<input type="text"/>			
<b>IMAGES/DOCUMENTS</b>				
Picture	<input type="text" value="HTTP://www.jonessupply.xyz/IMAGES/CATALOG/012-11-600.eps.jpg"/>			
Attachments	<input type="text" value="(none)"/>			
<b>PURCHASING INFO</b>				
Net Cost	<input type="text" value="0.00"/>	SourceID	<input type="text"/>	
Unit Cost	<input type="text"/>	Discount	<input type="text"/>	
Base Price	<input type="text"/>	Sell Multiplier	<input type="text"/>	
Source Item ID	<input type="text"/>		Method	<input type="text"/>
Price Date	<input type="text"/>			

This is an example of a customer catalog record from the import in inquiry