Global 3000
Service Pack Note

Product Details Import

Author	DCP	
Project	ZM60_000427.docx	
Version	1.0	1 of 14

INTRODUCTION

This service pack provides the ability to import product details from a C.S.V. format external file.

This service pack introduces a new button to the product details window within product maintenance.

The new button is labelled 'Import', when pressed the user is prompted for the filename (and path) to be imported and then the file structure details (which consist of the field/column position for the product details available for import). File structures are automatically saved. The new button can be controlled by authorisation point PM410_IMP.

Once the file content has been established and the user chooses to proceed with the import, all the product details (within the csv file) are validated. If any of the incoming details fail validation they are presented to the user and the import is abandoned. If all the incoming details are valid the file is imported and the user is then returned to the product details window.

The expected format of the csv file matches csv files produced by Microsoft Excel (fields are delimited by a single ',' character, dates are formatted as dd/mm/yyyy and text items are NOT enclosed within quotes), however it will also automatically detect when a text field is enclosed within either double or single quotes and remove these.

The following limitations will apply.

Each line within the import file must represent details of a single product to be imported (either a new product or updates to an existing one).

Price list entries, supplier product details and details of which locations the product is stocked at cannot be imported.

Normal product validation rules are applied during the import.

The product code is mandatory and must be present for each product in the import file. Lines within the import file with a blank product code are skipped.

The product description is mandatory for new products but is optional for existing products.

The following fields can be optionally included via the file content window, however if they have been selected for inclusion they must be present for each product imported.

- Look-up code.
- Product group.
- Product type.
- Product status.
- Decimal places.
- Unit group.
- Stock unit.
- Cost unit.
- Cost value.
- Weight.
- Analysis code 1.

- Analysis code 2.
- Alternate product.
- Barcode.
- Selling unit.
- Price as.
- Quantity discount scheme.
- Trade discount scheme.
- Allow back orders.
- Tax code.
- EC tax code.
- Limit transaction quantity to multiples of.
- Sales are classed as broadcasting, telecommunications or e-services (BTE).
- Settlement discount.
- Print on delivery notes.
- Depend on prior.
- Direct ordering.
- Delivery labels.
- Number of labels.
- Label unit.
- Carton size.
- Inspect receipts.
- Supply system.
- Supply lead time.
- Buying group.
- Shipping unit.
- Shipping volume.
- Shipping weight.
- Oncost type.
- Oncost percentage.
- Tariff/Commodity code.
- Serialised.
- Serial mask.
- Show all serial numbers.
- Suggest serial numbers on picking lists.
- Batch tracked.
- Print batch reference on picking lists.

- Check expiry date.

- Shelf life (in days).

- Stock check category.

- Allocation method.

- Automatic queue action.

- Primary location.

Please note, when updating an existing product via an import file, items that cannot be amended manually (for example in most cases the unit group, stock unit and cost unit cannot be amended) cannot be amended via the import file. In this case changes to items that cannot be amended are simply ignored.

DOCUMENTATION CHANGES

# Product Details – General Product Details Window
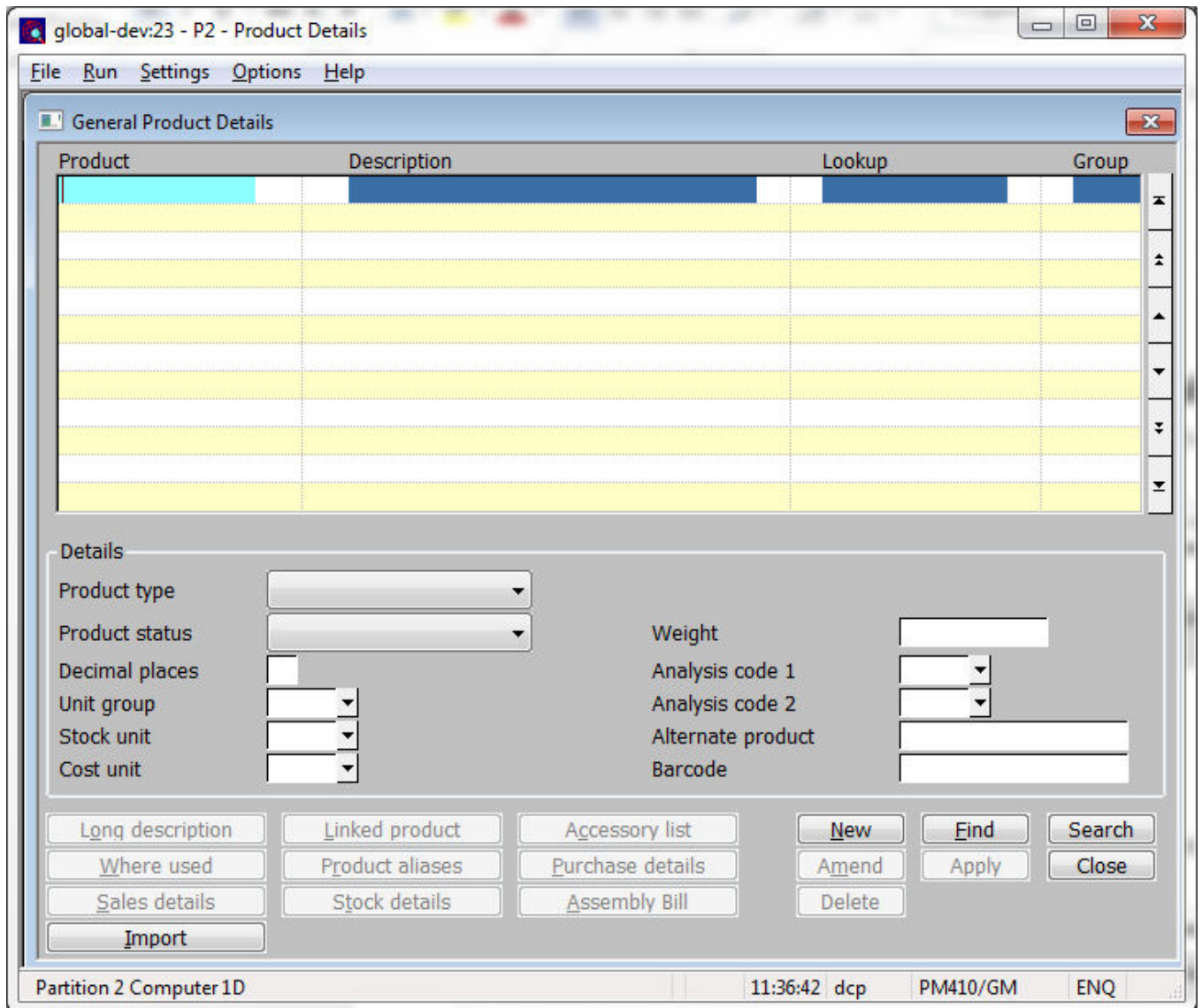
Import This allows product details to be imported from a csv format file. The csv file can contain details of new products, updates to existing products or a mixture of both.

Note Prices, supplier product information and stocked at location details cannot be imported.

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Import File Details Window
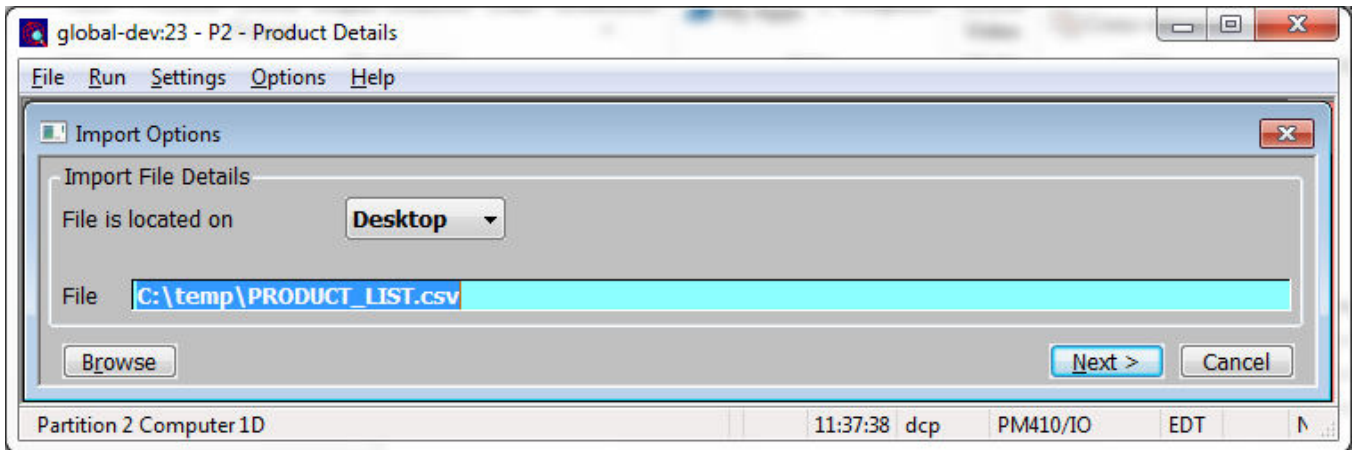
Purpose	This window enables you to specify the import file details.
Note	The settings in this window default to those used last time this option was selected.

The prompts are:

|	
File is located on	Set this option to 'Desktop' if the folder specified in the path is on the PC currently running GX, otherwise set the option to 'Server' to indicate that the import file is located on the main server.
Example	Assuming that the path is C:\My Documents, if the import file is located in the 'My Documents' folder on the operator's PC the above option should be set to 'Desktop' alternatively if the import file is located in the 'My Documents' folder on the server the above option should be set to 'Server'.
File	Enter the file name (including path and extension) in the host system. A file extension of '.csv' is automatically appended to the filename if one has not been supplied.
Note	If the import file is located on the desktop (i.e. the operator's PC) then the <Browse> button can be used to locate and specify the path.
Back	Where available this returns to the preceding window.

Select File Structure Window
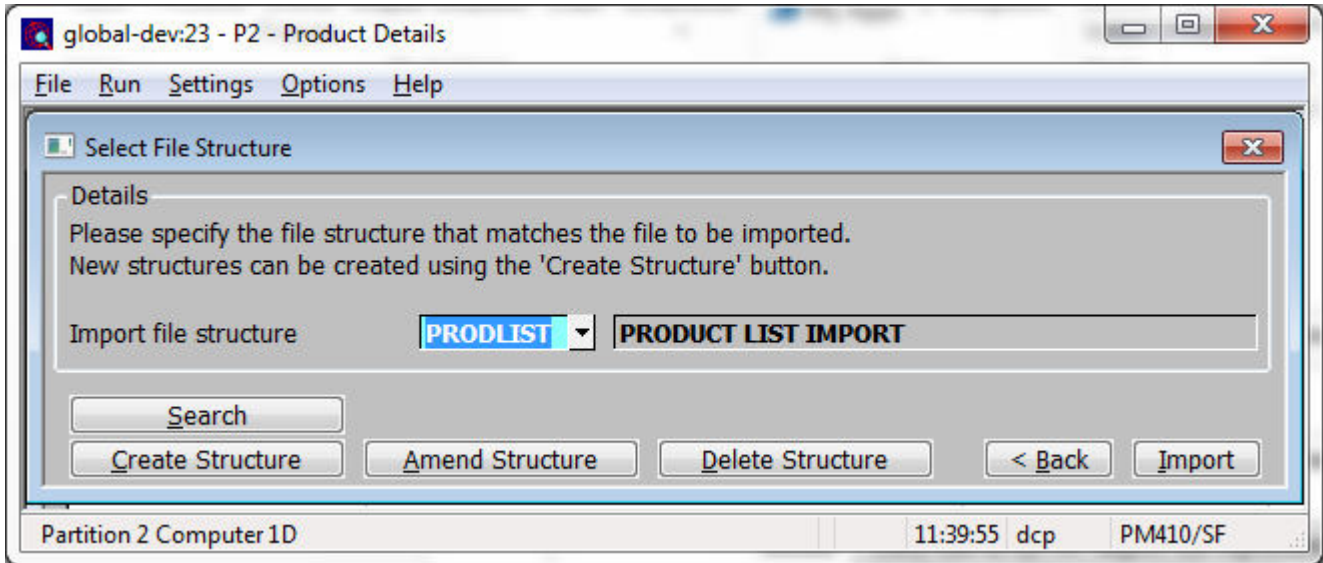
Purpose	This window enables you to select the structure of the file to be imported.

The prompts are:

Import file structure	Select the name of the import file structure that matches the file/spreadsheet to be imported. A look-up is available.
Notes	Each line in the csv import file represents details of a single product (either a new product or updates to an existing one).

The buttons are:

| Search	This provides a look-up of existing file structures.
Create structure	This allows you to create a new import file structure.
Amend structure	This allows you to amend an existing import file structure.
Delete structure	This allows you to delete an existing import file structure.
Back	This returns to the Import File Details window.
Import	This imports the selected file using the selected file structure.
Note	The import takes place in two phases.
	The first phase validates the incoming csv file, if any problems are detected a window is displayed listing the invalid items (where possible) and the import is abandoned.
	The second phase apply the updates and creates any new products, if this phase fails the import is terminated and the user must remove any unwanted products or updates manually.

Import File Structure Window
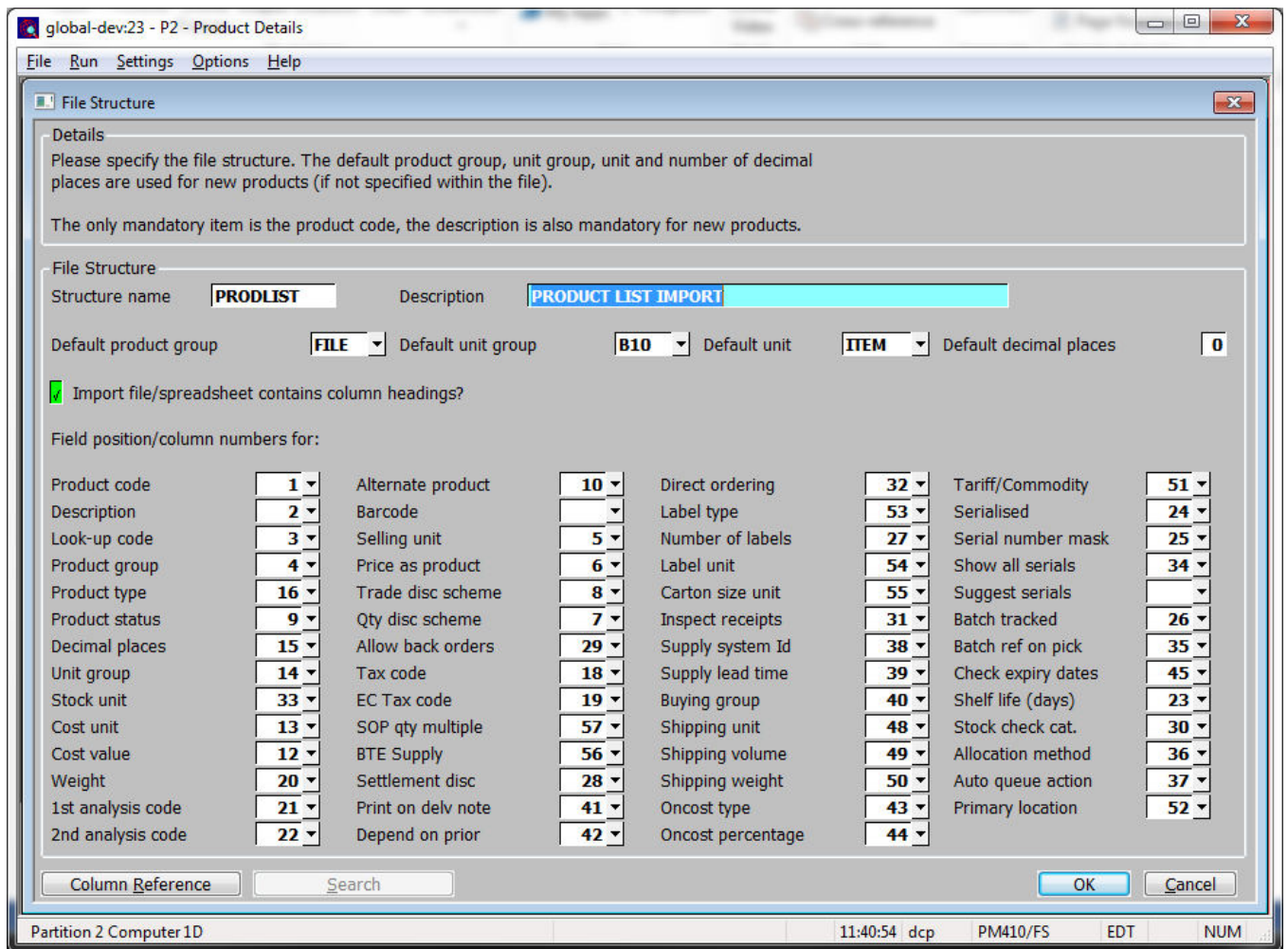
Purpose   This window enables you to specify the structure of the file to be imported.

Note   Each item that is selected for inclusion in a file structure must be present for each product imported via that structure.

The prompts are:

Name   Enter a name for the structure being created.

Description   Enter a description for the structure being created.

Default product group   Set this to the default product group to be used for new products that do not specify one. A search is available.

Default unit group   Set this to the default unit group to be used for new products that do not specify one. A search is available.

Default unit   Set this to the default unit to be used for new products. It is used for the stock, cost, sales, label or shipping units if any of them are not specified. A search is available.

Default number of decimal places   Set this to the default number of decimal places for the stock unit to be used for new products that do not specify one.

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Import file/spreadsheet contains column headings	Set this if the first line of the import file/spreadsheet contains column headings.
Note	The only fully mandatory item is the product code. The product description is mandatory for new products (but optional for existing products). All other items are fully optional (these are defaulted if excluded for new products). If the product code specified in the csv file already exists the incoming record is treated as an update to an existing product.
Field position/column number for the product code	Set this to the numerical field position (within a line) or column number (if importing from a spreadsheet) in which the product code located. This item is mandatory for all lines.
Example	Assuming the import file is a spreadsheet, if the product code is the third column in the spreadsheet the above field should be set to 3.
Field position/column number for the product description	Set this to the numerical field position (within a line) or column number (if importing from a spreadsheet) in which the product description is located. This item is mandatory for new products.
Field position/column number for the lookup code	Set this to the numerical field position (within a line) or column number (if importing from a spreadsheet) in which the lookup code is located. This item is optional.
Field position/column number for the product group	Set this to the numerical field position (within a line) or column number (if importing from a spreadsheet) in which the product group is located. This item is optional, if left blank or omitted for a new product the default product group (entered above) is used.
Field position/column number for the product type	Set this to the numerical field position (within a line) or column number (if importing from a spreadsheet) in which the product type is located. This field is only used when importing a new product and if left blank or not present the product type is defaulted to 'Stocked'. The accepted vales are: • P = Stocked product. • N = Non-Stocked product. • S = Service • E = Extra • % = Percentage Extra • C = Comment.
Note	If an item below is not relevant for the product type (e.g. the cost value is not valid for comment products) its value (which will preferably be set blank) will be ignored however it must still be included.

Field position/column number for the product status	Set this to the numerical field position (within a line) or column number (if importing from a spreadsheet) in which the product type is located. This item is optional, for new product this defaults to 'Normal' if omitted or blank.
	
	The accepted values are:
	
	    • N = Normal
	
	    • O = Obsolete
	
	    • S = Superseded

Field position/column number for the decimal places	Set this to the numerical field position (within a line) or column number (if importing from a spreadsheet) in which number of decimal places for the stock unit is located. This item is optional, for new products this defaults to 0 if omitted or blank. The accepted values are 0, 1, 2 or 3.
Field position/column number for the unit group	Set this to the numerical field position (within a line) or column number (if importing from a spreadsheet) in which the unit group is located. This item is optional, if left blank or omitted for a new product the default unit group (entered above) is used.
Field position/column number for the stock unit	Set this to the numerical field position (within a line) or column number (if importing from a spreadsheet) in which the stock unit is located. This item is optional, if left blank or omitted for a new product the default unit (entered above) is used.
Field position/column number for the cost unit	Set this to the numerical field position (within a line) or column number (if importing from a spreadsheet) in which the cost unit is located. This item is optional, if left blank or omitted for a new product the default unit (entered above) is used.
Field position/column number for the cost value	Set this to the numerical field position (within a line) or column number (if importing from a spreadsheet) in which the cost value is located. This item is optional.
Note	The cost value cannot be changed in FIFO or Average systems once stock has been received for a product.
Field position/column number for the weight	Set this to the numerical field position (within a line) or column number (if importing from a spreadsheet) in which the weight is located. This item is optional.
Field position/column number for the first analysis code	Set this to the numerical field position (within a line) or column number (if importing from a spreadsheet) in which the first analysis code is located. This item is optional.
Field position/column number for the second analysis code	Set this to the numerical field position (within a line) or column number (if importing from a spreadsheet) in which the second analysis code is located. This item is optional.
Field position/column number for the alternate product code	Set this to the numerical field position (within a line) or column number (if importing from a spreadsheet) in which the alternate product code is located. This item is optional.

Field position/column number for the barcode	Set this to the numerical field position (within a line) or column number (if importing from a spreadsheet) in which the barcode is located. This item is optional.
Field position/column number for the selling unit	Set this to the numerical field position (within a line) or column number (if importing from a spreadsheet) in which the selling unit is located. This item is optional, if left blank or omitted for a new product the default unit (entered above) is used.
Field position/column number for the price as product	Set this to the numerical field position (within a line) or column number (if importing from a spreadsheet) in which the price as product code is located. This item is optional.
Field position/column number for the quantity discount scheme	Set this to the numerical field position (within a line) or column number (if importing from a spreadsheet) in which the quantity discount scheme is located. This item is optional.
Field position/column number for the trade discount scheme	Set this to the numerical field position (within a line) or column number (if importing from a spreadsheet) in which the trade discount scheme is located. This item is optional.
Field position/column number for allow back orders setting	Set this to the numerical field position (within a line) or column number (if importing from a spreadsheet) in which the 'allow back orders' setting is located. This item is optional. The accepted values are: • Y = Yes. • N = No. • A = Always back order this product.
Field position/column number for the standard tax code	Set this to the numerical field position (within a line) or column number (if importing from a spreadsheet) in which the standard tax code is located. This item is optional.
Field position/column number for the EC tax code	Set this to the numerical field position (within a line) or column number (if importing from a spreadsheet) in which the EC tax code is located. This item is optional.
Field position/column number for the 'limit transaction qty to multiples of' setting	Set this to the numerical field position (within a line) or column number (if importing from a spreadsheet) in which the 'limit transaction qty to multiples of' setting is located. This item is optional.
Field position/column number for the 'sales are classed as BTE' setting	Set this to the numerical field position (within a line) or column number (if importing from a spreadsheet) in which the 'sales are classed as BTE' setting is located. This item is optional.
Field position/column number for the settlement discount setting	Set this to the numerical field position (within a line) or column number (if importing from a spreadsheet) in which the 'settlement discount' setting is located. This item is optional. The accepted values are: • Y = Yes. • N = No.

Field position/column number for the print on delivery notes setting	Set this to the numerical field position (within a line) or column number (if importing from a spreadsheet) in which the 'print on delivery notes' setting is located. This item is optional. The accepted values are: • Y = Yes. • N = No.
Field position/column number for the depend on prior setting	Set this to the numerical field position (within a line) or column number (if importing from a spreadsheet) in which the 'depend on prior' setting is located. This item is optional. The accepted values are: • Y = Yes. • N = No.
Field position/column number for the direct ordering setting	Set this to the numerical field position (within a line) or column number (if importing from a spreadsheet) in which the 'direct ordering' setting is located. This item is optional. The accepted values are: • Y = Yes. • N = No.
Field position/column number for the delivery labels setting	Set this to the numerical field position (within a line) or column number (if importing from a spreadsheet) in which the 'delivery labels' setting is located. This item is optional. The accepted values are: • N = None. • I = Per item. • D = Per delivery.
Field position/column number for the number of labels	Set this to the numerical field position (within a line) or column number (if importing from a spreadsheet) in which the number of labels is located. This is optional.
Field position/column number for the label unit	Set this to the numerical field position (within a line) or column number (if importing from a spreadsheet) in which the label unit is located. This item is optional, if left blank or omitted for a new product the default unit (entered above) is used.
Field position/column number for carton size	Set this to the numerical field position (within a line) or column number (if importing from a spreadsheet) in which the carton size unit is located. This item is optional, if left blank or omitted for a new product the default unit (entered above) is used.
Field position/column number for the inspect receipts setting.	Set this to the numerical field position (within a line) or column number (if importing from a spreadsheet) in which the 'inspect receipts' setting is located. This item is optional. The accepted values are: • Y = Yes. • N = No.
Field position/column number for the supply system	Set this to the numerical field position (within a line) or column number (if importing from a spreadsheet) in which the supply system is located. This item is optional.
Field position/column number for the supply lead time	Set this to the numerical field position (within a line) or column number (if importing from a spreadsheet) in which the supply lead time is located. This item is optional.

Field position/column number for the buying group	Set this to the numerical field position (within a line) or column number (if importing from a spreadsheet) in which the buying group is located. This item is optional.
Field position/column number for the shipping unit	Set this to the numerical field position (within a line) or column number (if importing from a spreadsheet) in which the shipping unit is located. This item is optional, if left blank or omitted for a new product the default unit (entered above) is used.
Field position/column number for the shipping volume	Set this to the numerical field position (within a line) or column number (if importing from a spreadsheet) in which the shipping volume is located. This item is optional.
Field position/column number for the shipping weight	Set this to the numerical field position (within a line) or column number (if importing from a spreadsheet) in which the shipping weight is located. This item is optional.
Field position/column number for the oncost type	Set this to the numerical field position (within a line) or column number (if importing from a spreadsheet) in which the oncost type is located. This item is optional. The accepted values are: • P = Product level. • G = Product group level. • S = Supplier level.
Field position/column number for the oncost percentage	Set this to the numerical field position (within a line) or column number (if importing from a spreadsheet) in which the oncost percentage is located. This item is optional.
Field position/column number for the tariff/commodity code	Set this to the numerical field position (within a line) or column number (if importing from a spreadsheet) in which the tariff/commodity code is located. This item is optional.
Field position/column number for the serialised setting	Set this to the numerical field position (within a line) or column number (if importing from a spreadsheet) in which the 'serialised' setting is located. This item is optional. The accepted values are: • Y = Yes. • N = No.
Field position/column number for the serial number mask	Set this to the numerical field position (within a line) or column number (if importing from a spreadsheet) in which the serial number mask is located. This item is optional.
Field position/column number for the show all serial numbers setting	Set this to the numerical field position (within a line) or column number (if importing from a spreadsheet) in which the 'show all serial numbers' setting is located. This item is optional. The accepted values are: • Y = Yes. • N = No.

Field position/column number for the suggest serial numbers on picking lists	Set this to the numerical field position (within a line) or column number (if importing from a spreadsheet) in which the 'suggest serial numbers on picking lists' setting is located. This item is optional. The accepted values are: • Y = Yes. • N = No. • S = Use the system level setting.
Field position/column number for the batch tracked setting	Set this to the numerical field position (within a line) or column number (if importing from a spreadsheet) in which the 'batch tracked' setting is located. This item is optional. The accepted values are: • Y = Yes. • N = No.
Field position/column number for the print batch reference on pick lists setting	Set this to the numerical field position (within a line) or column number (if importing from a spreadsheet) in which the 'print batch reference on pick lists' setting is located. This item is optional. The accepted values are: • Y = Yes. • N = No.
Field position/column number for the check expiry date setting	Set this to the numerical field position (within a line) or column number (if importing from a spreadsheet) in which the 'check expiry date' setting is located. This item is optional. The accepted values are: • Y = Yes. • N = No.
Field position/column number for the shelf life	Set this to the numerical field position (within a line) or column number (if importing from a spreadsheet) in which the shelf life is located. This item is optional.
Field position/column number for the stock check category	Set this to the numerical field position (within a line) or column number (if importing from a spreadsheet) in which the stock check category is located. This item is optional.
Field position/column number for the allocation method	Set this to the numerical field position (within a line) or column number (if importing from a spreadsheet) in which the product allocation method is located. This item is optional. The accepted values are: • P = Pooled. • Q = Queued. • S = Use the system level setting.
Field position/column number for the automatic queue action	Set this to the numerical field position (within a line) or column number (if importing from a spreadsheet) in which automatic queue action is located. This item is optional. The accepted values are: • A = Allocate, reserve, request. • R = Reserve, allocate, request. • Q = Always request. • S = Use the system level setting.

Field position/column number for the primary location	Set this to the numerical field position (within a line) or column number (if importing from a spreadsheet) in which the primary location is located. This item is optional.

The buttons are:

Column reference	This button is available at all field position/column number prompts. It allows you to enter a spreadsheet column reference (e.g. 'A', 'B' etc) which will then be automatically converted to a numeric column number.