Chapter 23 - Importing/Exporting

23.1 Importing Into the Database

Import allows you to bring data into the program's database from external sources such as .CSV or .TXT files. This allows you to quickly add information to your database rather than having to manually add it when you are initially setting up your software.

Data must be imported into the database in the following order:

1. Site
2. Locations
3. Suppliers
4. Manufacturers
5. Sales Tax Code
6. Customers
7. Items
8. Item Location
9. Item Supplier
10. Sales Tax Item
11. Inventory

Samples for each import type are installed in the InventoryControl/Import Samples folder. Use these samples to verify you have the correct data and format.

This topic covers:

Tips for Importing Data

How to Import Data

Required Fields

Handling Import Errors

Notes on Importing Inventory


23.1.1 Tips for Importing Data

- Do not attempt to use **Import** to modify existing records.
- Imported data will be truncated if field lengths exceed those within the program's database. Data Types and Sizes for each Table that can receive data via Import are documented in the **Database Properties** topic.
- If your data normally resides in a different data format, you must first use your existing database software's **File > Export** or **File > Save As** function to translate the data to a .csv or .txt file.

- You must strip out all currency symbols, including (but not limited to) these examples: $, ¢ , ¥, £, §, or ¤, if you are about to import them into a numeric field, such as Cost, List Price, etc. They are permissible in text fields.
- Commas, sometimes used as "thousands" separators, should be removed from numeric fields.

- Commas are permissible in text fields only when residing within a pair of double quotes, which will cause them to be treated as normal text, not as field delimiters.
- If you intend to import data to all available tables, make sure you import in the order specified above. It is also a good idea to review the information found in the **Related Data Fields** topic before proceeding with importing information.

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23.1.2 How to Import Data

In the example below, we will show how to import *Locations*. The steps are the same for importing all other types of information..

1. From the **Main** screen, click the **Administration** icon. The **Administration Menu** appears at the bottom of the screen.

2. On the **Administration Menu**, click **Import**. The **Import Wizard/Step 1: Origination and Destination Data** screen will appear.
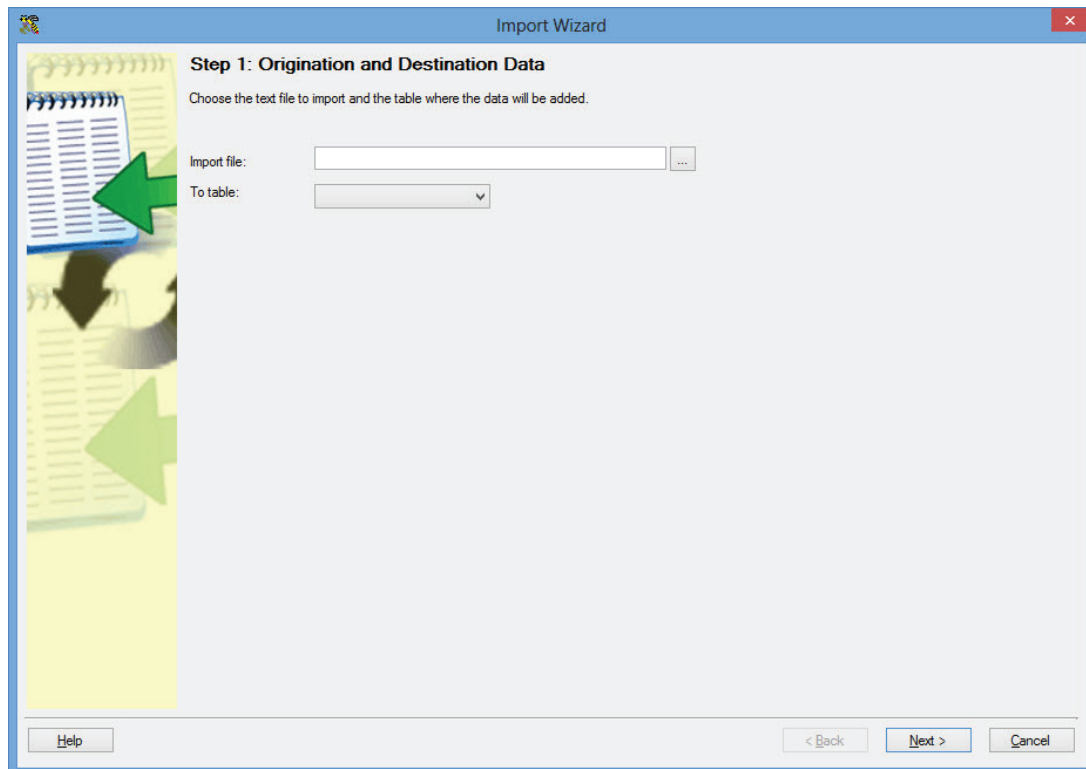
3. Enter the location and file name of the file you want to import, or click the **...** button located to the right of the **Import File** field to search for a file. Then select the table to which you want to import data from the **To table** drop down menu.

4. Click **Next** when you are ready to proceed. The **Step 2: Field Delimiter** screen appears.
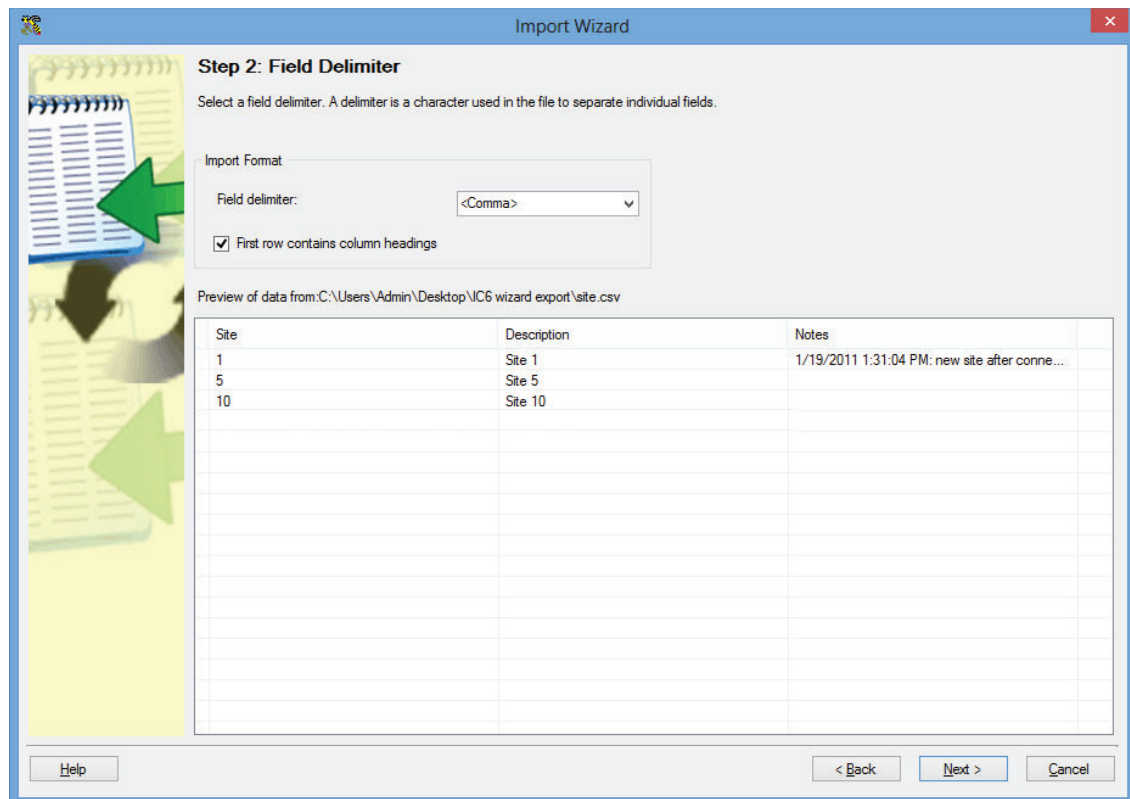

Delimiters are used to separate the data items in a database (the columns in the database table) when transporting the database to another application. For example, a comma-separated values file (CSV file) is one in which each value in the cells of a table row is delimited by and separated from the next value by a comma. The beginning of a row is indicated by a new line character.

5. Specify the field **Delimiter** used in the file from which you are importing data. This will always be a comma for .csv files, but any of the characters shown in the list box can be used with .txt files.

The preview window at the bottom of the screen will show you if your selected Delimiter is correct by displaying each column the system finds in your file when using that Delimiter. If all the data is in one column of the preview pane, you have not selected the right Delimiter.

Select the **First row contains column headings** option only if the first record of the file you are importing does not contain actual data. Import cannot remove subtotals, section headers, or any other records within the file that do not match the format of the actual data records. These must be removed before you attempt the import.

6. Click **Next** when you are ready to proceed. The **Step 3: Field Mapping** screen appears.
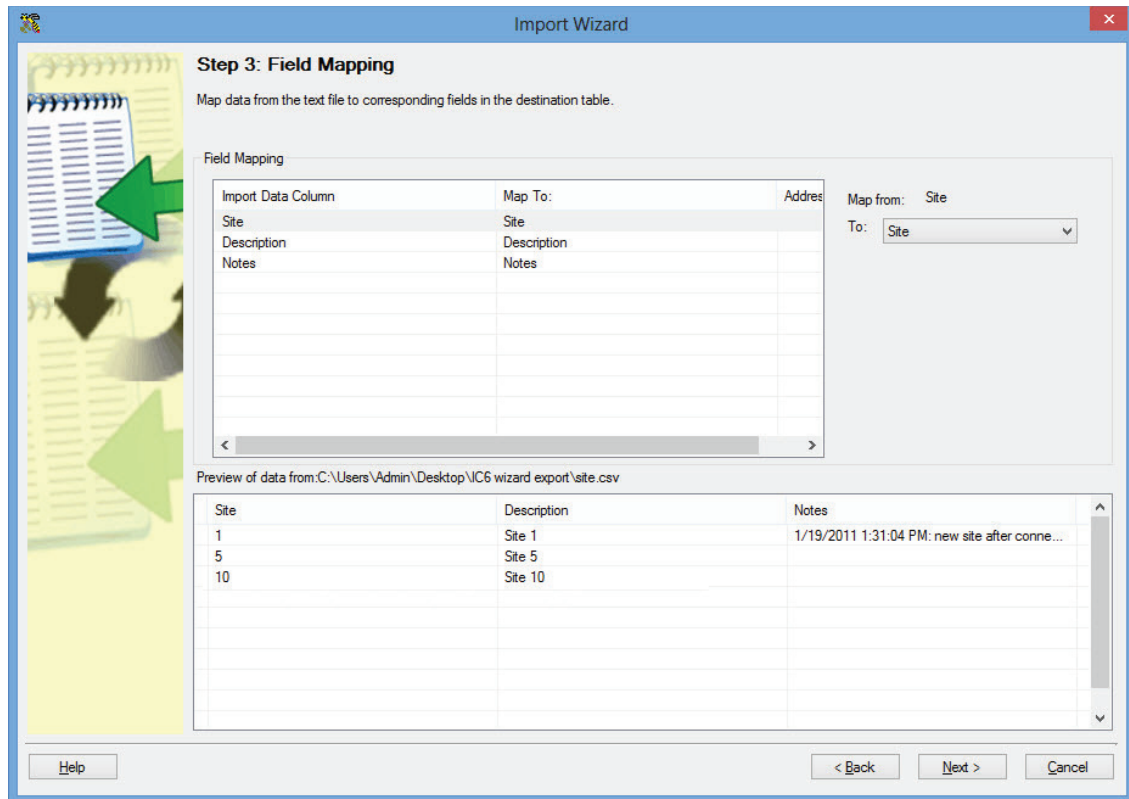
The **Field Mapping** screen allows you to associate columns which occur within your imported data file and corresponding fields within the table into which data will be written. Depending on the contents of your original database, not every column in your imported data needs to be mapped to a corresponding field in the program. The object is to bring over at least the required fields and any others that may be of use.

Note: If the **First Row Contains Column Heading** checkbox was checked in Step 2, the Import Wizard automatically compares the import file's **Import Data Column** heading to the **Map To** column heading. If a match is found, the Import Wizard populates the Field Mapping Import Data Column and Map To values. You may change the mapping for any column if necessary.

Special Note for Importing Items: When importing into the Item table, there are seven Map To fields which allow you to use the Import Data Columns for the purpose of enabling or disabling the *Item To Be Tracked By* or *Require the user to fill out* options found on the **Create New Item** and **Edit Item** screens. For more information on these options, please refer to the Create New Item topic.

Tracked By or Required Option is Enabled For This Record	Tracked By or Required Option is Disabled For This Record
True	False
T	F
Yes	No
0	1

These values are case-insensitive, but they are the only values allowed. Anything else will be rejected by Import. The default value is False.

The **Map To** fields, to which data columns containing these True/False values can be mapped, are named as follows in the Map To drop list:

- **Date Code (Track by?)**
- **Lot (Track by?)**
- **Pallet (Track by?)**
- **Serial Number (Track by?)**
- **Customer (Required ?)**
- **PO (Required ?)**
- **Supplier (Required ?)**

If, for example, you wanted every item being imported to be tracked by Serial Number, you could create a new column in your source data that contains the word "yes" in every cell of that column. If you chose to name this column TrackSer in your source data, you would then map from the TrackSer column to the Serial Number (Track by?) field.

You could just as easily edit this TrackSer column to turn on Serial Number tracking for some items and not others, by specifying values of "yes" or "no", as necessary. In either case, when you import the items, mapping your TrackSer column to the Serial Number (Track by?) field will correctly set the Tracked By Serial Number option for each item being imported. This negates the need to manually edit each imported item's Item To Be Tracked By Serial Number option after importing the items.

True/False, T/F, Yes/No or 0/1 columns can be added to your source data for any or all of the seven Map To fields shown above, so that the Tracked By and Required options are set for each item at the time of import.

Each record added to an **Auto Generated Number** field takes the maximum number present in its column and increments this value by 1. For an import, if the Employee table already has an ID field value that is equal to 100 and the Import Wizard recognized that your import file contains a value in a mapped column that is equal to or less than 100, it will present you with a Default Value of the first import record. All subsequent imported records will increment this value by 1. If this condition does not exist, the import will proceed with the values included in the import delimited text file.

7. Click **Finish** when you are done mapping all the desired fields to the table. A confirmation screen will appear that the data has been imported. You can verify the import by going to the List screen (**Main Window > Lists**) and viewing the list for that type of information. For

example, if you just imported Locations, view the Locations List to verify the new information is there.

23.1.3 Required Import Fields

All tables have some required fields that must be mapped. These are listed below:

Table	Required Fields
Site	Site
Location	Location, Site
Supplier	Supplier Code
Manufacturer	Name
Customer	Customer Number
Item	Item Number, Item Type
Inventory	Item Number, Quantity, Site and Location

Example: Site and Location are required fields for importing Locations. If you fail to map columns for the Location table's required fields, you will receive this prompt:

The following fields are required for each object record that you are importing. Please map them and try again.

        Location, Site

OK