

[Import Items - Import/Update Item Masters from Import File](#)

Concept:

This option allows adding/updating item masters from an import file into ProfitMaker. The option is available when the Fulfillment/Manufacturing (FFORMFG) special is installed. Additional updating can occur for specials related to Ecommerce, Realtime Manifest, User Defined Fields, Multiple Locations and ProfitPlus. This option will create DS, FG, PS and MC item masters. The option will not add/update matrix type items or OP, RS and RG type item masters.

The program contains two options:

IMPORT – Adds new items. Does not update or add information to existing items.

UPDATE – Updates or adds additional info to existing items. Does not add items.

Menu Location:

Graphics Menu – Inventory/Extra/Import Items

Tree Menu – Inventory/Other/Import Items

File layout:

The following spreadsheets will be used to get an understanding of the data requirements and gather your import data.

Item_Import_Field_Mappings.xlsx = Contains a list of all fields which can be added/updated through the import, along with the details, requirements, and validations on each field. This spreadsheet will be your guide for filling out the Item Import Template for both importing and updating.

Item_Import_Template.xlsx = Will be the file where you enter the information you want imported. The file information is separated into tabs (worksheets) which correlate to the various tabs contained in an item master view. Keep an empty copy of this template that can be used each time to start a new import session. You will also want to create separate spreadsheets for importing (adding items) and one for updating (changing existing items). The template contains the following tabs (worksheets).

- ItemGeneral
- Orderinfo
- Vendors
- CustPricing
- Ecommerce (must have Ecommerce special)
- Specs
- LocationSites (must have Multiple Locations special)
- LocationBins (must have Multiple Locations special)
- Plus (must have Multiple Locations and ProfitPlus specials)
- Exportinfo (must have Realtime Manifest special)
- UDFs (must have User Defined Fields Cust/Vend/Item special)

Suggestions:

1. Each time you have items to import/update, import it first into your ASIPLAYS directory. You can then review the changes to verify your expected results.
2. You may want your first import to only contain a few products. Once you review and are comfortable with the changes, you can include additional products.

Procedure:

After updating the template with the item information you want to import, save your xlsx file. (Doesn't matter what you name it, example: "ISUNewItems"). You may continue to edit/save the file until you are ready to create the csv files needed for the import.

When ready to import/update, you will need to save each worksheet tab as a .csv file by using the following steps. Each file must be named the same as the tab name. The .csv files you need to create will be determined by the specials you have installed. Save all these files in the same location. When importing, you will indicate the path to where these are located. This will also be the location where the Results Log will be stored upon import completion. The Results log lists any validations or issues for items contained in the import/update.

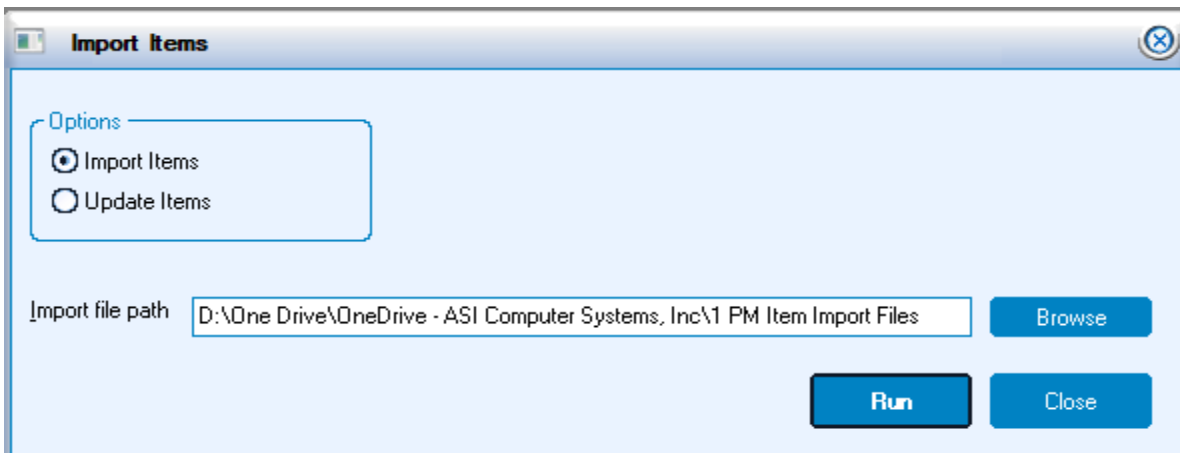
Steps to create each CSV file. **MUST save each as the CSV option (CSV (Comma delimited) (*.csv))**

1. **ItemGeneral** - Within your completed xlsx file, set focus on the ItemGeneral tab. Save the file as ItemGeneral.csv. This tab and csv **MUST** always contain the Item #/Cust# of all items being added/updated. Close the ItemGeneral.csv file that is now open. Reload your main file ex. ISUNewItems". Go to next tab.
2. **OrderInfo** - Set focus on the OrderInfo tab. Save the file as OrderInfo.csv. Close the OrderInfo.csv file that is now open. Reload your main file "ISUNewItems". You **MUST** create this csv even if tab info is empty. Then, go to the next step.
3. **Vendors** - Set focus on the Vendors tab. Save the file as Vendors.csv. Close the Vendors.csv file that is now open. Reload your main file "ISUNewItems". You **MUST** create this csv even if tab info is empty. Then, go to the next step.
4. **CustPricing** - Set focus on the CustPricing tab. Save the file as CustPricing.csv. Close the CustPricing.csv file that is now open. Reload your main file "ISUNewItems". **MUST** create this csv even if tab info is empty. Then, go to the next step.
5. **Ecommerce** - **MUST have Ecommerce special, otherwise go to the next step and skip this tab.** Set focus on the Ecommerce tab. Save the file as Ecommerce.csv. Close the Ecommerce.csv file that is now open. Reload your main file "ISUNewItems". If you have the Ecommerce special, you **MUST** create this csv even if tab info is empty. Then, go to the next step.
6. **Specs** - Set focus on the Specs tab. Save the file as Specs.csv. Close the Specs.csv file that is now open. Reload your main file "ISUNewItems". **MUST** create this csv even if tab info is empty. Then, go to the next step.
7. **ExportInfo** - **MUST have Realtime Manifest special, otherwise go to the next step, and skip this tab.** Set focus on the ExportInfo tab. Save the file as ExportInfo.csv. Close the ExportInfo.csv file that is now open. Reload your main file "ISUNewItems".
 - a. **NOTE:** If you have the Realtime Manifest special, you **MUST** create this csv even if tab info is empty. Then, go to the next step.
8. **UDFs** - **MUST have User Defined Fields (Cust, Vend, Item) special, otherwise go to the next step and skip this tab.** Set focus on the UDFs tab. Save the file as UDFs.csv. Close the UDFs.csv file that is now open. Reload your main file "ISUNewItems".
 - a. **NOTE:** If you have the User Defined Fields special, you **MUST** create this csv even if tab info is empty. At this time, all necessary csv files should now be created. Go to the next step.
9. **LocationSites** - **MUST have Multiple Locations special, otherwise go to the next step and skip this tab.** Set focus on the LocationSites tab. Save the file as LocationSites.csv. Close the LocationSites.csv file that is now open. Reload your main file "ISUNewItems".
 - a. **NOTE:** If you have the Multiple Locations special, you **MUST** create this csv even if tab info is empty. Then, go to the next step.

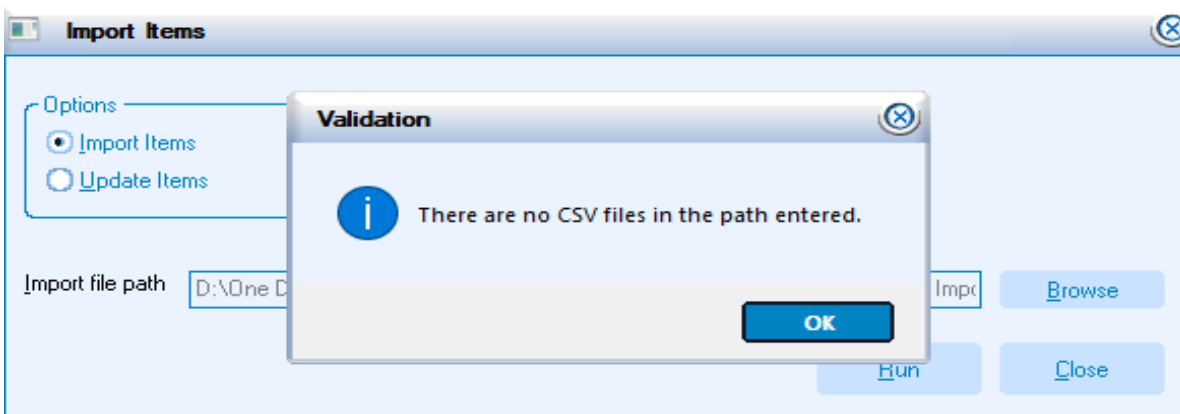
- LocationBins - MUST have Multiple Locations special, otherwise go to the next step and skip this tab.** Set focus on the LocationBins tab. Save the file as LocationBins.csv. Close the LocationBins.csv file that is now open. Reload your main file "ISUNewItems".
 - NOTE:** If you have the Multiple Locations special, you **MUST** create this csv even if tab info is empty. Then, go to the next step.
- Plus - MUST have Multiple Locations and ProfitPlus specials, otherwise go to the next step and skip this tab.** Set focus on the Plus tab. Save the file as Plus.csv. Close the Plus.csv file that is now open. Reload your main file "ISUNewItems".
 - NOTE:** If you have the Multiple Locations and ProfitPlus specials, you **MUST** create this csv even if tab info is empty. Then, go to the next step.
- When ready to import, you should backup your data.

To Import/Update, you will load the Import Items menu option and see the following Import Items option.

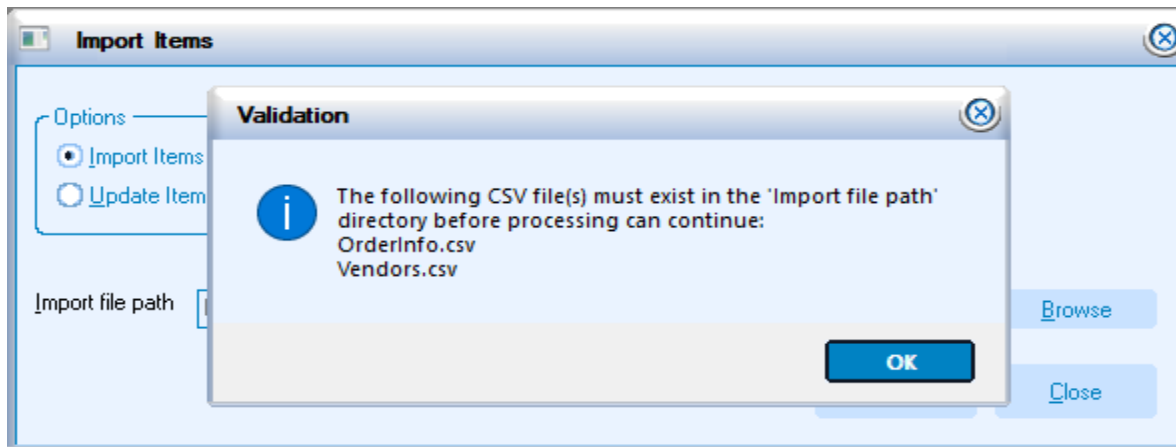
- Choose the radio button for the option you wish to perform. (Import or Update)
- Enter the path to where the csv files are located.
- Click Run



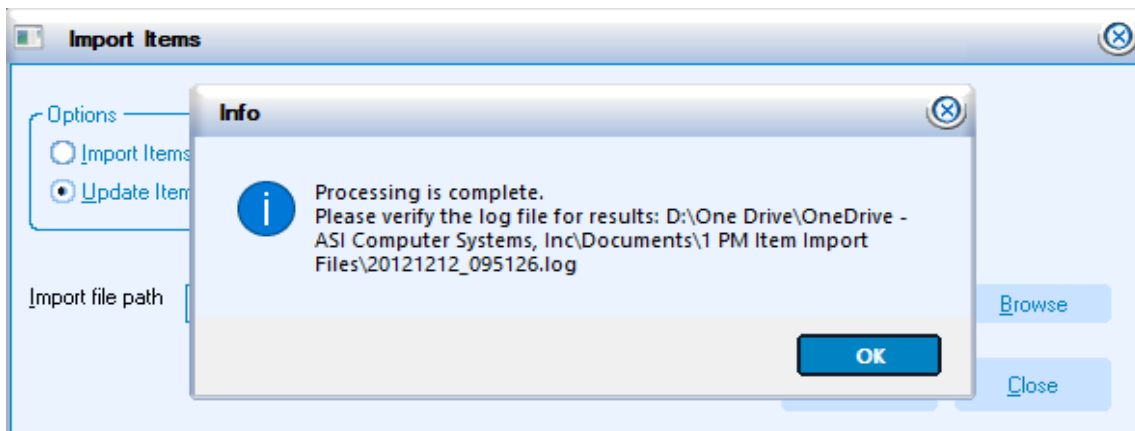
If you get the following message, this indicates that none of the necessary csv files are located in the path you input. You will want to correct the path and again click Run.



If there are some csv files in the path you entered, but some are missing, you will receive a message similar to the one shown below. You will need to put those csv files in your directory to continue.



4. Once all the above validations have passed and are able to Run, the csv files will be processed.
5. Upon completion, you will receive a message similar to the one shown below. This message indicates the name/location of the Results Log. (The location will be the same as where the csv files are located.)



6. You will then go to that location and review the Results Log. The log will indicate any issues with the information trying to be added/updated into your ProfitMaker items. If the log is empty, there were no issues related to the item updates.

Validations:

The issues will be noted as either a warning or an error and are grouped by worksheet tab.

ERROR type messages indicate an item couldn't be added/updated due to invalid critical information.

WARNING type messages indicate that non-critical information failed validation but was still updated with modified information, ex: truncating information that was too long, or assigning the field's default value when data is invalid, etc.

Below are shown just a few of the validations.

```
*20121215_155308.log - Notepad
File Edit Format View Help
ItemGeneral.csv ERROR: Item #SB3382/Cust #0 does not exist (Record #6). Therefore, item was not updated.
ItemGeneral.csv Warning: Item Description 2 for Item #G200TEST/Cust #79000 was greater than 25 chars; Therefore, was truncated.
ItemGeneral.csv Warning: Item Description 1 for Item #G200TEST/Cust #79000 was greater than 25 chars; Therefore, was truncated.
OrderInfo.csv Warning: 'Qty break/Price Code 1' for Item #G200TEST13/Cust #79000 was not valid; Value must be between 0 and 9999999. Therefore, field was not updated.
OrderInfo.csv ERROR: Cust # 79 for Item #G200TEST20 (Record #11) is invalid. Therefore, 'Order Info' for item was not updated.
Vendors.csv ERROR: 'Vendor #' for Item #G200TEST/Cust #79000/Vend Seq #2 (Record #3) was not valid. Therefore, record was not updated.
Vendors.csv Warning: 'Vendor Item #' for Item #G200TEST/Cust #79000/Vend Seq #2 (Record #4) was greater than 10 chars; Therefore, was truncated.
CustPricing.csv ERROR: Item # for Cust #79000 (Record #5) is missing. Therefore, 'Customer Pricing Info' for item was not updated.
CustPricing.csv Warning: 'Alt Item Description' for Item #G200TEST2/Cust #0/Program #UNI was greater than 25 chars; Therefore, was truncated.
Commerce.csv Warning: 'Graphic Name' for Item #CC101/Cust #0/Program #UNI was greater than 10 chars; Therefore, was truncated.
Specs.csv ERROR: Item # for Cust #79000 (Record #3) is missing. Therefore, 'Specs Info' for item was not updated.
ExportInfo.csv Warning: 'Harmonization code' for Item #G200TEST/Cust #79000 was greater than 10 chars; Therefore, was truncated.
UDFs.csv ERROR: Item #sb3382/Cust #0 (Record #2) does not exist in Itemmast.dbf. Therefore, 'UDF Info' for item was not updated.
```

Finished!

Once the import is complete, you should load item master maintenance to verify a variety of the items appear as expected.