Importing External Stock Data into Counter Intelligence Office V11

Counter Intelligence Office includes an Import Function that allows Stock / Product Code data from an external data source to be imported into the Counter Intelligence database, which either creates new Stock records, or updates the existing Stock records.

TIP: It is highly recommended that a backup is taken prior to updating the database.

To import a Stock file into Counter Intelligence, it MUST be in a Comma separated variable (CSV) format. Therefore, the file is usually formatted in Excel, and then saved as a CSV format.

To prepare the file for importing, the Excel spreadsheet must have column headings **exactly** corresponding to the field names listed in the following table; otherwise the import will be rejected. It is not necessary to have all of the fields specified in the import file, nor does the sequence they are in matter.

Note: You must have the highlighted fields though. These are **Style**, **Group** and **Supplier**.

In the following table, a list of supported field names and the characteristics of each of the fields is specified. Extra fields may exist, but will be ignored by the import.

If a field or fields do not match correctly the fieldnames, it is likely the import will be rejected.

Once all the information in the spreadsheet is correct, you must then save the file in a comma separated variable (**.csv**) delimited file format.

Stock Groups
Before importing Stock Code data, **one or more** Stock Groups **MUST** already be defined. If Stock Groups haven't been specified in the Import file, the import will ask to select a specific Stock Group, and all records imported will be assigned to this Stock Group. This can lead to incorrect grouping, and products will probably need to be re-grouped, which result in a lot of time wasted, therefore it is recommended that you specify the Stock Groups in the import file.

Suppliers
Before importing Stock Code data, **one or more** Suppliers **MUST** already be defined. If Suppliers haven't been specified in the Import file, the import will ask to select a specific Supplier, and all records imported will be assigned to this Supplier. This can however lead to incorrect Suppliers, and products will probably need to be re-grouped, which result in a lot of time wasted, therefore it is recommended that you specify the Supplier in the import file.

Field Name	Reqd	Len	Description

Style	Yes	20	The record being processed will be REJECTED if the Style field:
			     is empty
			     has more than 20 characters or contains the ~ character.
			If the Style doesn't exist it will be added; otherwise the existing record will be modified.
			However, if the Barcode field is present and not empty Office searches for the product the barcode is associated and the product is modified.
			If both Style and Barcode fields are not empty, Office checks if the Style field and the product code for the barcode match. If they do not, Office attempts to change the code associated with the product. The change fails if the new code already exists in Office, or contains the ~ character.

Description	No	80	The record being processed will be REJECTED if the Description field has more than 80 characters. There are no restrictions on what this field can contain. NOTE: Do not include Colour and size in the description, if you are using ATTR1 and ATTR2, as these are appended to the Description by the system.

Group
 	
Alternatively use:
 	
StockGroupDescription
	Yes	8	The record being processed will not be imported if the Group file:
			     is empty
			     has more than 8 characters or contains the ~ character
			If the Group doesn't exist, it will be added.
			NOTE: If the Group field is not defined in the import file, C.I. requires the user to select an existing group from those already defined in C.I., and one must be defined.
			The full Name of the Stock Group. use tilde (~) between the Group Levels.
			Eg: Apparel~Mens~Pants~Denim

Supplier	Yes	6	The record being processed will be rejected if the Supplier field:
			     is empty
			     has more than 6 characters or contains the ~ character.
			If the Supplier doesn't exist it is added.
			NOTE: If the Supplier field is not defined in the import file, C.I. requires the user to select an existing supplier from those already defined in C.I, and one must be defined.

Field Name	Reqd	Len	Description
UDF1	No	40	It is often used for label, brand or season brand analysis. The record being processed will be REJECTED if the UDF1 field has more than 40 characters. There are no restrictions on what this field contains. If the UDF1 field is not already defined in the database it is added.
UDF2	No	40	It is often used for label, brand or season brand analysis. The record being processed will be REJECTED if the UDF2 field has more than 40 characters. There are no restrictions on what this field contains. If the UDF2 field is not already defined in the database it is added.
UDF3	No	40	It is often used for label, brand or season brand analysis. The record being processed will be REJECTED if the UDF3 field has more than 40 characters. There are no restrictions on what this field contains. If the UDF3 field is not already defined in the database it is added.
UDF4	No	40	It is often used for label, brand or season brand analysis. The record being processed will be REJECTED if the UDF4 field has more than 40 characters. There are no restrictions on what this field contains. If the UDF4 field is not already defined in the database it is added.
SupplierProductCode	No	15	The record being processed will be REJECTED if the SupplierProductCode field has more than 15 characters or contains the tilde (~) character. If any existing record has an existing Supplier Product Code, it will be deleted and the Supplier Product Code from the import file will be inserted.
Unit	No	5	The record being processed will be REJECTED if the Unit field has more than 5 characters. There are no restrictions on what this field contains.
LabelNumber	No	1	A number between 1 and 9 may be entered, which corresponds to the Price Label Number, used when saving the Layout of Price Labels. NOTE: The Label Number is set to 1 by default. If you subsequently want an item to use a different label layout, you may change this in - Working with Stock, Create/Modify.
StockedType	No	1	The record being processed will be REJECTED if the character in the StockedType field does not appear on the list below. N (Non Stocked)　　　　E (New Product) M (Manual Reorder)　　　Y (Auto-Reorder) R (Redundant – Retain)　　I (Indent - No Reorder) If the StockedType field is not defined in the import file, the user **must** select a stocked type for all products at import time.

Field Name	Reqd	Len	Description
DefaultMargin	No		A number between 1.00 and 100.00 may be entered. This will be used to calculate margin % and values in Reports where no Average Cost value is present.
Weight	No	10	A number between 1 and 999,999,999 may be entered. This will be used to calculate the total weight of the stock on hand of a Stock Item, which can optionally be included in the Stock Holding Report or used to calculate freight on Eretailer.
Volume	No	10	A number between 1 and 999,999,999 may be entered. This will be used to calculate the total volume of the stock on hand of a Stock Item, which can optionally be included in the Stock Holding Report or used to calculate freight on Eretailer.
ExcludeFromLoyalty	No		Key in the word "TRUE" for all rows that are to be excluded from the Loyalty scheme.
PLU	No	6	If the PLU column does not exist in the import file the system asks the user if it should generate PLU numbers based on the Next PLU switch setting or set the PLU to 0. In all cases apart from when No is selected from the previously mentioned question, the system ensures the PLU is not already in use, if it is, then the system automatically generates a number based on the Next PLU switch setting.
Attr1	No	15	This is the Attribute 1 field in System Settings, usually used to record an item's Colour. This column is optional; if it exists, any record being processed will be REJECTED if the Attr1 field is longer than 15 characters or contains the tilde (~) character. If the Attr1 field is not already defined in the system, it is added to the Stock Attributes table at import time.
Attr2	No	15	This is the Attribute 2 field in System Settings, usually used to record an item's Size. This column is optional; if it exists, any record being processed will be REJECTED if the Attr2 field is longer than 15 characters or contains the tilde (~) character. If the Attr2 field is not already defined in the system, it is added to the Stock Attributes table at import time.
Attr1Description	No	40	This is used to import the full colour name for the product. The record being processed will be REJECTED if the Attr1Description field has more than 40 characters. NOTE: This field will only be imported if the Attr1 field is also defined.
BinLocation	No		Up to 6 alpha-numeric digits may be entered.
Barcode	No	20	If it exists any record which contains a Numeric Barcode field of between 7 and 20 digits has all its existing barcodes deleted and replaced with the Barcode from the import file. If the Barcode number in the import file is already allocated to another product then it is NOT used in this product. If the barcode exists in the system and is associated with another product the existing record is modified. If the Style field is not empty Counter Intelligence checks the existing product code to see if they match, if they do not match Counter Intelligence attempts to change the product code, this fails if the new code already exists in the system or contains the tilde (~) character.

Field Name	Reqd	Len	Description
Barcode2 thru Barcode20	No		They allow the import of multiple Numeric Barcodes of between 7 and 20 digits, to be inserted into a single Stock Item. If it exists any record which contains a Numeric Barcode field of between 7 and 20 digits has all its existing barcodes deleted and replaced with the Barcode from the import file. If the Barcode number in the import file is already allocated to another product then it is NOT used in this product. If the barcode exists in the system and is associated with another product the existing record is modified. If the Style field is not empty Counter Intelligence checks the existing product code to see if they match, if they do not match Counter Intelligence attempts to change the product code, this fails if the new code already exists in the system or contains the tilde (~) character.
Branch	No	3	If it exists, the following columns will only be applied for Branch specified - PriceStatus, Price1, Price2, Price3, Price4, Price5, GSTPrice1, GSTPrice2, GSTPrice3, GSTPrice4, GSTPrice5, CostPrice, LastPurchasePrice, CostPrice, StandardCost, MinStockLevel, MaxStockLevel, ReorderMultiple and BinLocation. If it does not exist, the following columns will be applied to all Branches in the system – PriceStatus, Price1, Price2, Price3, Price4, Price5, GSTPrice1, GSTPrice2, GSTPrice3, GSTPrice4, GSTPrice5, CostPrice, LastPurchasePrice, CostPrice, StandardCost, MinStockLevel, MaxStockLevel, ReorderMultiple and BinLocation.
PriceStatus	No	1	Price Status ('S': Special, 'D' or empty: Default) If the PriceStatus field is defined all prices will be assumed default unless specified 'S' as special. If the PriceStatus field is not defined or Branch field exists the existing Price Status is used.
Price1	No		If the Price1 filed is defined all active branches will have Price 1 for this product set to this value, which is a GST exclusive price.
Price2	No		If the Price2 filed is defined all active branches will have Price 2 for this product set to this value, which is a GST exclusive price.
Price3	No		If the Price3 filed is defined active branches will have Price 3 for this product set to this value, which is a GST exclusive price.
Price4	No		If the Price4 filed is defined all active branches will have Price 4 for this product set to this value, which is a GST exclusive price.
Price5	No		If the Price5 filed is defined all active branches will have Price 5 for this product set to this value, which is a GST exclusive price.
GSTPrice1	No		If the Price1 filed is defined all active branches will have Price 1 set to this value – which is GST inclusive.
GSTPrice2	No		If the Price2 filed is defined all active branches will have Price 2 set to this value – which is GST inclusive.
GSTPrice3	No		If the Price3 filed is defined all active branches will have Price 3 set to this value – which is GST inclusive.

Field Name	Reqd	Len	Description
GSTPrice4	No		If the Price4 filed is defined all active branches will have Price 4 set to this value – which is GST inclusive.
GSTPrice5	No		If the Price5 filed is defined all active branches will have Price 5 set to this value – which is GST inclusive.
LastPurchasePrice	No		If the LastPurchasePrice field is defined all active branches will have Last Purchase Price set to this value – assumes GST exclusive.
CostPrice	No		If the CostPrice field is defined all active branches will have Average Cost set to this value – assumes GST exclusive.
StandardCost	No		If the StandardCost field is defined all active branches will have Standard Cost set to this value – assumes GST exclusive.
MinStockLevel	No	10	Sets the minimum stock quantity.
MaxStockLevel	No	10	Sets the maximum stock quantity.
ReorderMultiple	No	10	Sets the reorder multiple.
Availability	No	255	Stock availability message.
ShortDescription	No	255	Short description for Eretailer style.
LongDescription	No		Long description for Eretailer style.
Promotion	No	255	Promotion title for Eretailer style.
Sequence	No	2	Sequence for Eretailer stock. Up to 2 alphabetic or numeric characters may be entered.
Active	No	1	Active status for Eretailer stock. 0(No Active) 1(Active) 2(Always Active) 3(Display Only). NOTE: Display Only is only available in CI Office B378 or higher.
Featured	No		Featured status for Eretailer stock. Key in the word "TRUE" for featured product.
Categories	No		List of Eretailer categories which the style associated with. Categories list must be full path with the tilde (~) character separated and categories in path must be separated by the colon (:) character. The maximum hierarchical level of category is 4. Example: Mens:Shirts~Mens:Pants~Mens:Shorts
Filters	No		List of Eretailer filters which the style associated with. Filters list must be full path with the tilde (~) character separated and filters in path must be separated by the colon (:) character. The maximum hierarchical level of filter is 2. Example: Occasion:Formal~Occasion:At Work
Cluster	No	15	Eretailer cluster which the style associated with. If the cluster is specified but no cluster can be found in Counter Intelligence a new cluster is created.
VideoUrl	No	255	Video Url for Eretailer stock.
Prompt	No	4	The record being processed will be REJECTED if Prompt field has more than 4 characters or contains the ~ character. If the Prompt Code doesn't exist the record will be bypassed.
Notes	No	4	The record being processed will be REJECTED if Notes field has more than 4 characters or contains the ~ character. If the Notes Code doesn't exist the record will be bypassed.

Field Name	Reqd	Len	Description
Attr1Image	No		The full path of image file, title and sequence for the attr1. These elements must be separated by the tilde (~) character and image file format must be BMP, JPG or PNG. Example: c:\images\attr1image.jpg~ image title~1 *In order to clean up existing colour images prior to import, leave this empty and use **Attr1Image2** to **Attr1Image10** fields.
Attr1Image2 thru Attr1Image10	No		They allow the import of multiple images into a single Eretailer stock attr1.
StockImage	No		The full path of image file, title and sequence for the style. These elements must be separated by the tilde (~) character and image file format must be BMP, JPG or PNG. Example: c:\images\styleimage1.jpg~ image title~1 *In order to clean up existing stock images prior to import, leave this empty and use **StockImage2** to **StockImage10** fields.
StockImage2 thru StockImage10	No		They allow the import of multiple images into a single e-retailer stock item.
Information1Description	No	25	
Information1	No		
Information2Description	No	25	
Information2	No		

When importing Counter Intelligence displays a grid of the fields found in the specified import file.

An audit report is generated once the import is complete.