

Importing External Stock Data into Counter Intelligence Office 2009

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	Min	Max	Description
Style	Yes		15	<p>The record being processed will be REJECTED if the Style field:</p> <ol style="list-style-type: none"> 1. is empty 2. has more than 15 characters or contains the ~ character <p>If the Style doesn't exist, it will be added; otherwise the existing record will be modified.</p> <p>However, if the Barcode field is present and not empty, the Style field may be empty.</p> <p>Office searches for a product whose barcode is associated.</p> <p>If one exists, the product is modified; otherwise the record is ignored</p> <p>If both Style and Barcode fields are not empty, Office checks if the Style field and the product code for the barcode match.</p> <p>If they do not, Office attempts to change the code associated with the product.</p> <p>The change fails if the new code already exists in Office, or contains the ~ character.</p>
Description	No		40	<p>If present, the first 40 characters are used as the product description. There are no restrictions on what this field can contain.</p> <p>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.</p>
Group	Yes		4	<p>The record being processed will not be imported if the Group file:</p> <ol style="list-style-type: none"> 1. is empty 2. has more than 4 characters or contains the ~ character <p>If the Group doesn't exist, it will be added.</p> <p>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.</p>

Field Name	Reqd	Min	Max	Description
Supplier	Yes		6	<p>The record being processed will be rejected if the Supplier field:</p> <ol style="list-style-type: none"> 1. is empty 2. has more than 6 characters or contains the ~ character <p>If the supplier doesn't exist - it is added at import time.</p> <p>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.</p>
UDF1	No		25	<p>It is often used for label or brand analysis.</p> <p>If present the left 25 characters will be used.</p> <p>There are no restrictions on what this field contains.</p> <p>If the UDF1 field is not already defined in the system, it is added to the UDF1 table at import time.</p>
UDF2	No		25	<p>It is often used for label or brand analysis.</p> <p>If present the left 25 characters will be used.</p> <p>There are no restrictions on what this field contains.</p> <p>If the UDF2 field is not already defined in the system, it is added to the UDF2 table at import time.</p>
SupplierProductCode	No		15	<p>If it exists, any record which contains the Suppliers Item Code longer than 15 characters or contains the tilde (~) character will not be added.</p>
Unit	No		5	<p>If it exists, the left 5 characters are set to the unit description.</p> <p>If present, the left 5 characters that define the unit of measure will be added.</p> <p>There are no restrictions on what this field contains.</p>

Field Name	Reqd	Min	Max	Description
LabelNumber	No		4	A number between 1 and 9 may be entered, which corresponds to the Price Label Number, used when saving the Layout of Price Labels. 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	Field exists - any record containing a StockedType not of the these types will not be added. N (onStocked) E (New Product) M (Manual Reorder) Y (Auto-Reorder) I (Indent - No Reorder) If the StockedType field is not defined in the import file, C.I. requires the user to select a stocked type to use for all records.
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.
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.
ExcludeFromLoyalty	No			Key in the word "TRUE" for all rows that are to be excluded from the Loyalty scheme.

Field Name	Reqd	Min	Max	Description
Prompt	No		4	The record being processed will not be imported if the Prompt Code 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 not be imported if the Notes Code has more than 4 characters or contains the ~ character. If the Notes Code doesn't exist, the record will be bypassed.
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. Note: If you want C.I. to generate the PLU numbers for you don't include this column in the import csv file.
Attr1	No		10	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 which contains an Attr1 field that is longer than 10 characters or contains the tilde (~) character will not be added. If the Attr1 field is not already defined in the system, it is added to the Stock Attributes table at import time.

Field Name	Reqd	Min	Max	Description
Attr2	No		10	<p>This is the Attribute 2 field in System Settings, usually used to record an item's Size.</p> <p>This column is optional. If it exists, any record which contains an Attr2 field that is longer than 10 characters or contains the tilde (~) character will not be added.</p> <p>If the Attr2 field is not already defined in the system, it is added to the Stock Attributes table at import time.</p>
BinLocation	No			Up to 6 alpha-numeric digits may be entered.
Barcode	No		13	<p>If it exists, any record which contains a Numeric Barcode field, of between 7 and 13 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.</p> <p>This field can now be used to identify the product that is to be modified. If the barcode exists in the system, and is associated with a 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.</p>

Field Name	Reqd	Min	Max	Description
Barcode2 thru Barcode20	No			They allow the import of multiple Numeric Barcodes of between 7 and 13 digits, to be inserted into a single Stock Item. If the Barcode number in the import file is already allocated to another product then it is NOT used in this product.
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) Field exists - all prices will be assumed default unless specified 'S' as special. Field does not exist or Branch field exists - existing Price Status is used.
Price1	No			Field exists - all non deleted branches will have Price 1 for this product set to this value, which is a GST exclusive price.
Price2	No			Field exists - all non deleted branches will have Price 2 for this product set to this value, which is a GST exclusive price.

Field Name	Reqd	Min	Max	Description
Price3	No			Field exists - all non deleted branches will have Price 3 for this product set to this value, which is a GST exclusive price.
Price4	No			Field exists - all non deleted branches will have Price 4 for this product set to this value, which is a GST exclusive price.
Price5	No			Field exists - all non deleted branches will have Price 5 for this product set to this value, which is a GST exclusive price.
GSTPrice1	No			All non deleted branches will have Price 1 set to this value – which is GST inclusive.
GSTPrice2	No			All non deleted branches will have Price 2 set to this value – which is GST inclusive.
GSTPrice3	No			All non deleted branches will have Price 3 set to this value – which is GST inclusive.
GSTPrice4	No			All non deleted branches will have Price 4 set to this value – which is GST inclusive.
GSTPrice5	No			All non deleted branches will have Price 5 set to this value – which is GST inclusive.
LastPurchasePrice	No			All non deleted branches will have Last Purchase Price set to this value – assumes GST exclusive.
CostPrice	No			All non deleted branches will have Average Cost set to this value – assumes GST exclusive.
StandardCost	No			All non deleted 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.

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.