

## Support Bulletin # 61 ABM 3 Sales Order Import

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### Introduction

Version 3 of ABM now allows customer orders to be imported from an Excel spreadsheet. This process allows you to bring in a template order as many times as needed for any customer selected. The Sales Order wizard is initiated by clicking the Import Sales Orders button from the Customer Sales Order View (Fig 1).

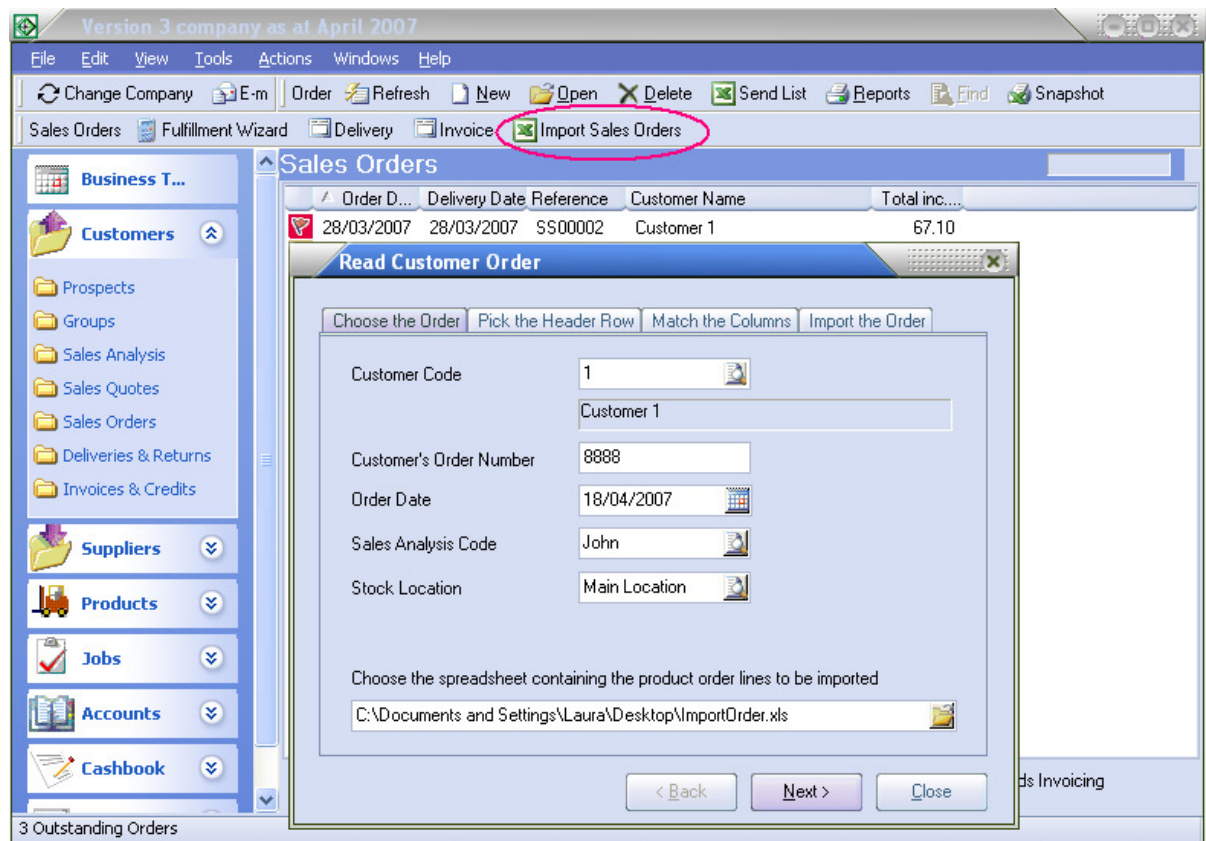


Fig 1

### Import file format

The import file must be in MS Excel format. The file should contain at least 1 header row and at least the product code and quantity columns. A price column can also be added but it is optional. In our example we called the file ImportOrder.xls (Fig 2).

Hint: Close the Excel file prior to importing the file to accommodate the error checking process.

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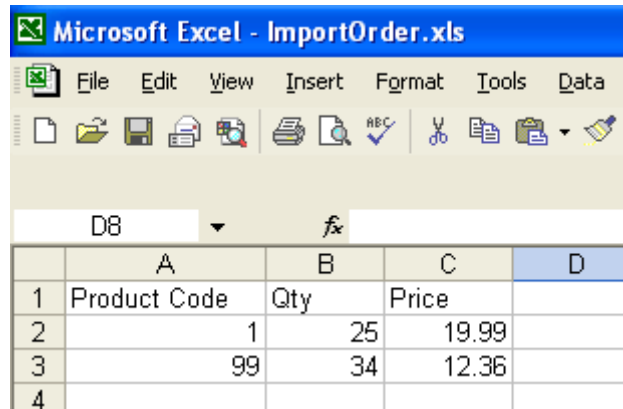


Fig 2

## Using the Import Sales Order Wizard

1. Select the Customer Code, Customer's Order Number, Order Date, Sales Analysis Code and Stock Location.
2. Browse the computer and select the Excel worksheet that contains the sales order information to import. Click the Next button to continue.
3. Select the Header Row by indicating the row number which contains the column headings (Fig 3). Click the Next button to continue.

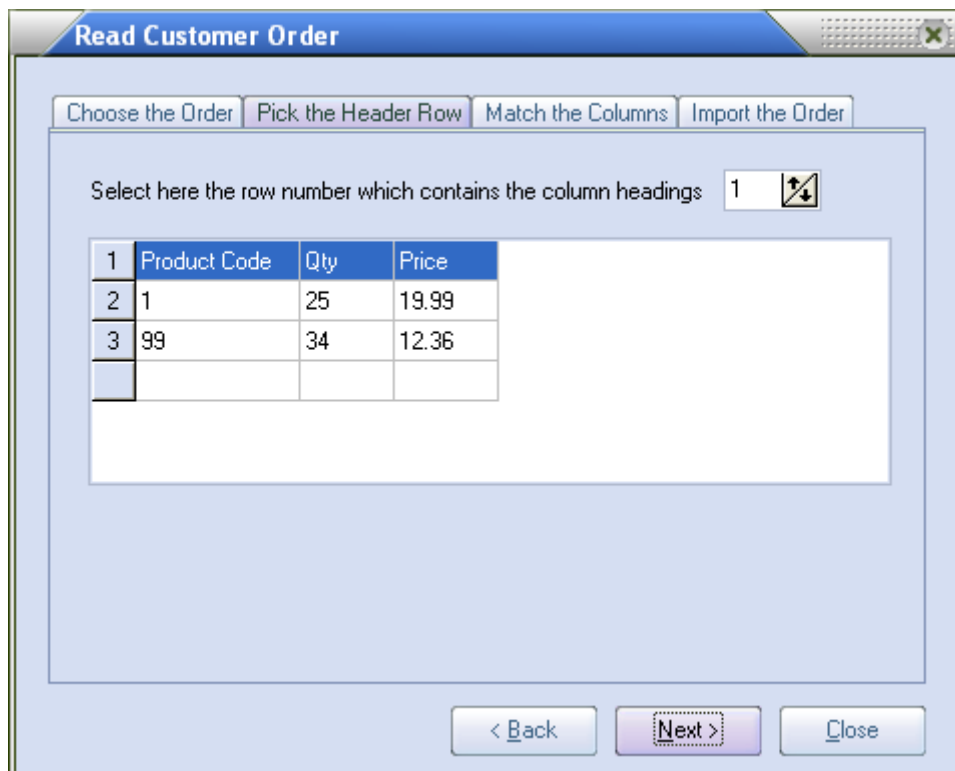


Fig 3

- Map the Product Code, Quantity Ordered, and Price to the corresponding column in the spreadsheet (Fig 4). As stated if no price column is selected then the wizard will lookup the price in ABM. Click next to continue.

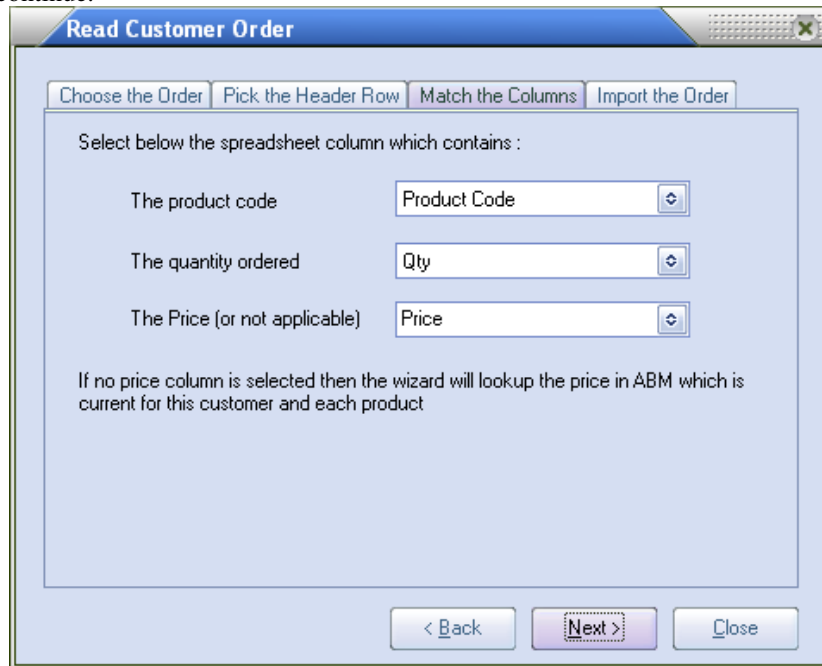


Fig 4

- Check the spreadsheet for errors button (Fig 7). ABM will verify that the product code matches a product in the database and that the Qty and Price fields are numeric. If an error is found ABM will produce a warning (Fig 5) and will mark the record(s) in the input Excel file by shading them red (Fig 6). In this example there is no product code 99 in the database.

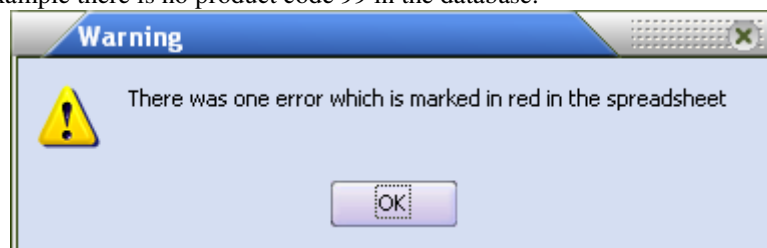


Fig 5

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	A	B	C	D	E
1	Product Code	Qty	Price		
2	1	25	19.99		
3	99	34	12.36		
4					

Fig 6

6. Import the order by clicking on Create the Customer Order button (Fig 7).

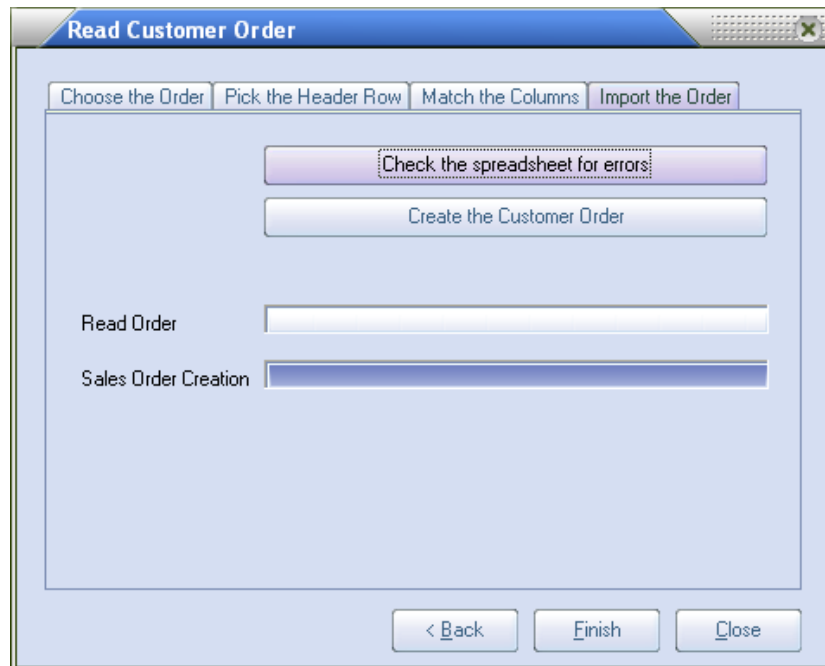


Fig 7

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