

# Protean Software

Parts Record Import Notes

# Part Records Import



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# Part Records Import

## Protean Versions

This document describes the import functionality for Parts Records from Protean 7.3.4033 to Current Latest Release

## Description

This import template is used to **Create** New or **Update** Existing Parts records in Protean.

## Notes for updating existing records:

To not import something, use a <DO NOT IMPORT> marker in the field on the record in question, the existing date for this field will remain unchanged. This is only applicable to fields marked YES as can this be updated in the table below.

# Part Records Import

Fields on the Import - expected number of columns = 27:

Column	Field Name	Mandatory	Requirements	Can this be updated?	Notes
A	PartNumber	Always	Required Field Text Maximum 50 characters	No	Any unique part number creates a new record. Modifications must be made in front end.
B	Description	If New	Required if new Text Maximum 255 characters	Yes	
C	StockState	If New	N=New R=Refurb U=Used Required if new or if updating selling price or Supplier info	No	A unique stock state for an existing part will just create a new stock state line.
D	SerialNumbered	If New	Text - Y/N 1 character Required if new	No	
E	SellingPrice	If New	Can be 0	Yes	
F	SupplierCode	If New	Must exist in Protean – Use Supplier Alpha Code Text	No	If unique it does add a new possible supplier for the part number
G	SupplierPartNo	If New	Text	Yes	Maximum 50 characters
H	SupplierCostPrice	If New	Can be 0	Yes	
I	ManufacturerCode	No	Text Maximum 50 characters Must exist in Protean if used (System > Stock > Manufacturers)	Yes	
J	ManufacturerPartNo	No	Text	Yes	Maximum 50 characters
K	StockType	If New	Must exist in Protean (System > Stock > Stock Types) Text	Yes	Maximum 50 characters

# Part Records Import

Column	Field Name	Mandatory	Any requirements	Can this be updated?	Notes
L	DiscountCategory	No	Must exist in Protean if used (System > Stock > Sales Discounts) Text	Yes	Maximum 50 characters
M	PriceCategory	No	Must exist in Protean if used (System > Stock > Price Category)	Yes	Maximum 50 characters
N	HoldingCategory	No	Must exist in Protean if used (System > Stock > Holding categories)	Yes	Maximum 50 characters
O	SupplierRRP	If New	Can use 0	Yes	
P	Notes	No		Yes	
Q	Obsolete	If New	Text - Y/N	Yes	Y = Obsolete N = Not Obsolete
R	SupercedePartNo	No		Yes	Only adds, does not modify existing supersession. Can't enter this as well as an EquivalentPartNo
S	SupplierLeadTime	No		Yes	
T	EquivalentPartNo	No		Yes	Only adds, does not modify existing equivalent. Can't enter this as well as an SupercedePartNo
U	StockUnit	Yes	Must exist in Protean (System > Stock > Stock Units) Text Required if new record	No	
V	SupplierStockUnit	Yes	Must exist in Protean (System > Stock > Stock Units) Text Required if new record	No	
W	UserRef1	No	If used Entry must exist in Protean as an option in user ref 1 dropdown	Yes	

# Part Records Import

X	UserRef2	No	Entry must exist in Protean as an option in user ref 2 dropdown	Yes	
Y	UserRef3	No		Yes	
Z	PurchaseDiscountCategory	No	If used - Must exist in Protean (System > Stock > Purchase Discount Categories)	Yes	
AA	Add Record	Always	Required	N/A	Used to determine if record is being included in import

## How to import

1. File must be saved in CSV format.
  - a. File must not contain any header rows.
2. Navigate to file tab on Protean
3. Select Import Data
4. Use the import wizard
5. Select 'Parts Records' under the type of data dropdown
6. Find the CVS import file (as per step 1)
7. Hit Next to validate the data
  - a. If needed correct import file
8. If step (7) successful - Double check the data on screen
9. Hit next to import into Protean
  - a. If needed review any warning messages and either correct in Protean / Import file and revert to step (2) onwards
10. If successful choose to keep or delete the import file used

## Best Practice

- If using Excel – do not double click to open a CSV File.
- Open Excel and use a data import from text to open any CSV
  - Select text formatting for any data including leading zeros
- Once ready, save in CSV format – including the header rows
- Review the saved CSV file in raw text format
- Remove the header row from the raw text CSV - save as another name with .csv formatting

# Part Records Import

- Run any major import in a practice environment before live
- Carry out a sample import of under 10 records before any larger import

## Other Info

This import is available in XML format.

Regular scheduling of this import is possible via the Protean scheduler.

## Further Assistance

Example CSV template available on support website

Please review import templates webinar - <https://support.proteansoftware.co.uk/knowledge-base/webinar-import-templates/>

Contact Protean Support

# Part Records Import

## Version Control

Version	Comments	User	Date	Approver
1.0	Original Document	John Mills	01/08/2018	VM
2.0	Update to include best practice	Matt Hayden	06/02/2019	JD
2.1	Update to Description Max 255	Matt Hayden	17/07/2019	MH