

Protean Software

Makes & Models Import Notes

Makes & Models Import

Contents

Protean Versions	3
Description	3
Fields on the Import - expected number of columns = 15:	4
Editing the CSV notepad.....	5
How to import	6
Best Practice	6
Other Info	7
Further Assistance	7

Makes & Models Import



Protean Versions

This document describes the import functionality for makes and models into Protean 7.3.4033

Description

This import template is used to **create** Makes & Models (does not update existing makes and models).

Makes & Models Import

Fields on the Import - expected number of columns = 15:

Column	Field Name	Mandatory	Requirements	Notes
A	UserRef2	1 st Line Only	Text Field Max 50 Characters	This field is not mandatory but in order to create the correct amount of commas when saving to CSV please follow the best practice. Save CSV including header rows initially, and manually edit the csv file to remove the header rows.
B	Description	No	Text Field 100 Characters Max	The description of the make and model
C	EquipCat	Always	Text Field Max 30 Characters	Must already exist in Protean System>Equipment>Types
D	EquipType	Always	Text Field Max 30 Characters	Must already exist in System>Equipment>Types
E	Make	Always	Text Field Max 30 Characters	Add the make you wish to create, may already exist but if new model then OK, if updating elements of a make and model, that is OK too
F	Model	Always	Text Field Max 30 Characters	Add the model you wish to create, may already exist, if updating elements of a make and model, that is OK too
G	Notes	No	Text Field	Will add notes to the notes field in the make and model general tab
H	Obsolete	Always	Y/N field	Flag to demote if the make and model is obsolete, will change the general tab status to discontinued if Y or Current if N
I	EquipSubType	Always	Text Field Max 30 Characters	Must already exist in System>Equipment>Types

Makes & Models Import

J	SupplierCode	No	Text Field Max 8 Characters	Requires the supplier alpha code if the make and model is to be linked to a supplier
K	SupplierCost	No	Monetary field to 2 decimal places (no symbols)	Will populate the RRP field in the make and model general tab NOTE** will round up or down to nearest whole number
L	SellingPrice	No	Monetary field to 2 decimal places (no symbols)	Will populate the Selling Price field in the make and model general tab NOTE** will round up or down to nearest whole number
M	SupplierDiscount	No	Numeric Field Percentage % to 2 decimal places	Will populate the supplier discount percentage field in the make and model general tab
N	SupplierLeadTime	No	Numeric Field Whole numbers only in days Max 2 Characters	Will populate the lead time field (in days) in the make and model general tab
O	TaxCode	Always	Text Field Links to existing tax code	Must relate to a tax code name already set up in Protean, such as standard or exempt

Makes & Models 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 'Makes and Models' 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
- Run any major import in a practice environment before live
- Carry out a sample import of under 10 records before any larger import

Makes & Models 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

Makes & Models Import

Version Control

Version	Comments	User	Date	Approver
1.0	Original Document	Glen Barber	30/05/2019	MH