

Suppliers Import Notes



Contents

Protean Versions	3
Description	3
Fields on the Import - expected number of columns = 18:	4
How to import	6
Best Practice	6
Further Assistance	7

Protean Versions

This document describes the import functionality for suppliers into Protean

Description

This import template is used to create & update supplier records





Fields on the Import - expected number of columns = 18:

Column	Field Name	Mandatory	Requirements	Notes
А	AccountCode	Always	Required Field	Alpha code for the supplier
			Text Field	
			17 Characters Max (depending on accounts system	
			may be lower)	
В	Name	No	Text Field	Supplier or supplier site name (If site)
			Max 255 Characters	
С	AddressLine1	No	Text Field	1 st line of suppliers address
			Max 255 Characters	
D	AddressLine2	No	Text Field	2 nd line of suppliers address
			Max 255 Characters	
E	AddressLine3	No	Text Field	Town/City of suppliers address
			Max 255 Characters	
F	AddressLine4	No	Text Field	County of suppliers address
			Max 255 Characters	
G	PostCode	No	Text Field	Postcode for supplier address
			Max 10 Characters	
Н	TelephoneNumber	No	Text Field	Main telephone number
			Max 50 Characters	
I	FaxNumber	No	Text Field	Suppliers fax number
			Max 50 Characters	
J	EmailAddress	No	Text Field	Main email address for supplier, will
			Max 50 Characters	populate the email address in the
				suppliers general tab
К	WebAddress	No	Text Field	Suppliers web address, will populate
			Max 50 Characters	the general tab web address field on
				the supplier record
L	VatRegNo	No	Text Field	Will populate the vat reg number in
			Max 50 Characters	the accounts tab of the supplier
				record

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M	TaxCode	No	Text Field Max 50 Characters	Must already exist in Protean, if nothing entered will populate the tax code field in accounts with the default tax code i.e. standard
N	InvoiceTerms	No	Numeric Field	 1 = Inv Date 2 = As Settle Days 1 after Inv Date 3 = As Settle Days 2 after Inv Date 4 = Due end of next month 5 = End of Month plus Settle Days 1 If not entered, defaults to Settings
0	SettleDays1	No	Numeric Field	Enter in days, if nothing entered defaults to 30
Р	SettleDays2	No	Numeric Field	Enter settle days 2 days, if nothing entered defaults to 0
Q	CurrencyCode	No	Text Field	If entered, the corresponding code must exist in the currency code section in Protean system>accounts>accounts dropdown> currency, use the code not the name i.e. GBP
R	InvAccountCode	No	Text Field	Only use if the record is a site record belonging to a supplier account, use the supplier alpha code. Note – follow best practice to review the saved CSV to ensure correct amount of comma's are present.

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 'Supplier Import' 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
 - \circ $\;$ 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



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



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Version Control

Version	Comments	User	Date	Approver
1.0	Original Document	Glen Barber	29/05/2019	MH