

Protean Software

Misc Sales Orders Import

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Protean Versions

This document describes the import functionality of Misc sales order records from Protean 7.3.4033 to Current Latest Release

Description

This import template is used to **create** miscellaneous sales orders records.

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

Column	Field Name	Mandatory	Requirements	Notes
A	Customer Alpha	Always	Required Field Text Field – 17 Characters Max	Mandatory field, required, needs to be either the customer alpha code
B	Delivery Alpha	Always	Required Field Text Field – 17 Characters Max	Mandatory field, site alpha code
C	Depot	Always	Text Field – 255 Characters Max	Depot Name – Must Exist In Protean, usually Main Depot
D	Order Ref	No	Text Field – 255 Characters Max	Enter Customer's Order Number
E	Order Date	Always	Date Field	Enter the order date in the format 01/01/2020
F	Due Date	Always	Date Field	Enter the due date in the format 01/01/2020
G	Sales Rep	No	Text Field – 255 Characters Max	This populates the sales rep field, must exist in Protean. Please note the order taken by field will populate with the user details of the person doing the import.
H	Carriage	No	Currency Field	Enter the cost value of the misc line, must be in base currency
I	Place Order	Always	Mandatory Y/N Field	If Y the order will be placed, if N the order will remain at entry status
J	Notes	No	Text Field	Will populate the memo field in the sales order
K	UserRef1	No	Text Field – 50 Characters Max	Must exist as a user ref in Protean, still use if user ref 1 field has been renamed in Protean

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L	UserRef2	Always	Text Field – 50 Characters Max	Free text field to enter into user ref 2 option in Protean, can be used even if user ref 2 field has been renamed
M	Item Description	Always	Text Field – approx. 500,000,000 Characters	This is the text section of the misc line on the sales order can contain a lot of text and is very sizeable (Over 500 million characters approx.)
N	Misc Type	Always	Text Field – 255 Characters Max Must Exist In Protean	Must exist in Protean (Misc Nominal Codes)
O	Cost	Always	Currency Field – Base currency	Must be in base currency
P	Price	Always	Currency Field – Customers Currency	If the customer is being charged in a different currency enter the value in their currency
Q	Exchange Rate	Always	Numeric Field	Conversion rate if converting from base currency to customer currency enter the conversion rate as a numeric value if no exchange enter 1
R	Invoice Text	No	Memo Field	Enter notes that you want to appear on the invoice. If not entering any notes – see best practice regarding saving of header row and removing on raw text file prior to importing.

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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 'Customers' 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

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Other Info

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

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Version Control

Version	Comments	User	Date	Approver
1.0	Original Document	Glen Barber	23/12/2019	MH