

## Importing Orders into Counter Intelligence Office v11

The **Import Orders** function allows for Orders to be imported into Counter Intelligence Office from an external source.

**TIP:** It is highly recommended that a backup is taken prior to updating the database.

The Order Import file **MUST** be in a Comma separated variable (CSV) format. To create the CSV file, prepare your Orders in Excel or a similar spreadsheet, and export the file into a CSV format.

The import Orders function requires that the Customers and Style / Product Codes **MUST** already exist in Counter Intelligence Office. If they don't, then you must import them beforehand using the Import Customer and Import Stock from External Data functions.

The column headings **MUST** match exactly to the field names specified in the table below. It is not necessary to have all the fields specified, but you **MUST** have the field names that are required. It does not matter if which order they are sequenced.

The following is a list of supported **Field Names**, the names are not case-sensitive. Extra fields are allowed, but are ignored by import function.

Field	Reqd	Len	Description
<b>Branch</b>	No	3	The <b>Branch Code</b> stock is being sold from. If this column is not included, when importing, the user will be prompted to select an existing branch code, which will be used for all orders in the import. If the branch is specified, but no branch with that code can be found in Office, the line is ignored.
<b>Code</b>	No	6	The <b>Customer Order</b> number. If the Order number specified does not exist, a new order number is created. If the Order number already exists but customer or date is different as existed with the order number, it generates the next available number. If this field is left blank, the code is assumed to be the same as the code on the previous import line if it has same customer and date as the previous line otherwise, it generates the next available number.
<b>Date</b>	No	11	The <b>Date</b> on which the order is to be created. If this field does not exist or is left blank, the current date is used.
<b>Customer</b>	No	8	The <b>Customer Code</b> for the Order. If this column is not included, when importing, the user will be prompted to select an existing customer code, but marketing customers, which will be used for all orders in the import. If the Customer Code is specified, but it can't be found in Office, the line is ignored.

Field	Reqd	Len	Description
<b>Salesperson</b>	No	7	The <b>Sales Person Code</b> for the order. If this column is not included, when importing, the user will be prompted to select an existing employee code, which will be used for all orders in the import. If the Salesperson Code is specified, but it can't be found in Office, the line is ignored.
<b>Style</b>	Yes	20	The <b>Style Code</b> of product that is being sold. If it contains <b>Pack Sales Unit Code</b> , it must be <b>separated by '~'</b> such as 'Beer~4PK', 'Vodka~1LT', etc. NOTE: Pack units can only be used if 'Always Print Components' is ticked in the stock code definitions. If the style does not already exist in Office, the line will be ignored.
<b>Colour</b>	No	15	The <b>Colour Code</b> of product. If the Colour specified does not already exist in Office, the line will be ignored.
<b>Size</b>	No	15	The <b>Size Code</b> of product. If the Size specified does not already exist in Office, the line will be ignored.
<b>Quantity</b>	Yes	15	The <b>Quantity</b> of product. If the Quantity is blank, zero, or less than zero, the line is ignored.
<b>UnitPrice</b>	No	15	The <b>Tax Exclusive Unit Price</b> of product. If this column is not included, Office will record the Unit Price as customer's price or retail price if customer's price does not exist. If the Unit Price is blank or zero, the line is ignored.
<b>RequiredBy</b>	No	11	The <b>Date</b> when products are required by. If this field is not included or is blank, the current system date is used.
<b>Reference</b>	No	40	The Order Reference Number.

### Importing

When importing, Counter Intelligence displays a grid of the fields found in the specified import file.

An audit report is generated once the import is complete.