Importing Purchase Orders into Counter Intelligence Office

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

The Purchase Orders Import function requires that the Style / Product Codes **MUST** already exist in Counter Intelligence Office. If they don't, then you must import them beforehand using this function.

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	Description
Branch	No	The **Branch Code** for the purchase order. If this column is not included, the user is prompted to enter a branch code, which will be used for all purchase orders in the import. If the branch is specified, but no branch with that code can be found in Office, the line is ignored.
Code	Yes	The **Purchase Order** number. If the PO number specified does not exist, a new purchase order is created. If the PO number already exists and was not created during the import, it is incremented until a new purchase order can be created. **NB**. If the field is left blank, the code is assumed to the same as the code on the previous import line.
Date	No	The **Date** on which the purchase order is to be created. If this field does not exist, the current date is used.
Supplier	No	The **Supplier Code** for the purchase order. If a Supplier Code is not included, when importing, the user will be prompted to select a supplier code, which will be used for all purchase orders in the import. If the Supplier Code is specified, but the supplier code can't be found in Office, the line is ignored.
Buyer	No	The **Buyer** who raised the Purchase Order. If this field exists, it records the **Buyer** for the purchase order.
Style	Yes	The **Style** that is being purchased. If the style does not already exist in Office, the line will be ignored.
Attr1	No	Commonly used as the **Colour** field. If the Colour specified does not already exist in Office, the line will be ignored.
Attr2	No	Commonly used as the **Size** field. If the Size specified does not already exist in Office, the line will be ignored.

Field	Reqd	Description
Quantity	Yes	The **Quantity** of items being purchased. If the Quantity is blank, zero, or less than zero, the line is ignored.
UnitPrice	Yes	The **Cost Price** of the Style. If the Cost Price is blank, Office will record the Cost Price as 0.
DeliveryDate	No	The expected **Date** of the Delivery for the Purchase Order.
CancelDate	No	The **Date** Purchase Order will be cancelled if there is no matching Delivery.

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.