Corero Installation Instruction for our Catalogue

The Catalogue Product Import option can be found under Purchase Order Processing> Maintenance.

Data that can be imported

The option will import data from a supplier catalogue, via Microsoft Excel. Only certain fields can be imported. These are:

Product Code	Mandatory
Product Description	Mandatory
Product Long Description	Optional
Cost Price	Optional
Unit Description	Optional
VAT Code	Optional
Nominal Code	Optional
Custom Code 1	Optional
Custom Code 2	Optional
Custom Code 3	Optional

The original catalogue must provide the product code and description, and will probably provide the unit description and the cost price. It is less likely that it will provide the long description.

The VAT code and Nominal Code, and all the custom codes, cannot be provided by the supplier, as they are specific to the client. They can be added by the user, either to the Excel spreadsheet, or within the data grid in the program screen.

Import Preparation – Excel

The catalogue will be required in a format known as CSV; these files can be opened by Excel.

Please open the catalogue in Excel. There is one line per product, and on that line are the fields that the catalogue is providing for import. The product code and description must be present. If they are not, please contact the provider of the catalogue.

Only the fields listed above may be imported into Resource. If there are extra fields in the catalogue, you may import them into the custom code fields, as long as they do not exceed 16 characters, and as long as this conforms to your previous use of the custom codes. If there are columns in the spreadsheet that you cannot import, delete the entire column. That is, remove the column entirely, rather than just delete the fields and leave a blank column.
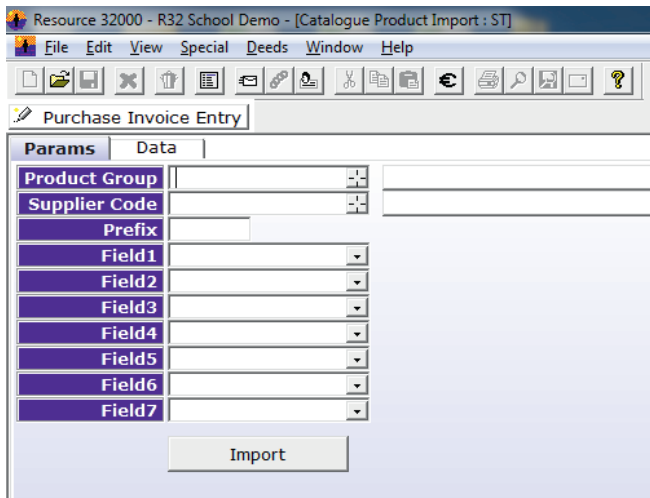
Up to seven columns may be imported. If the catalogue provides more, you must decide which are more important, and remove the less important ones. You cannot import more than seven columns in total.

The import will be performed from the prepared spreadsheet.

Continued….

Select the menu item for "Catalogue Product Import". The screen will look like this:

This is a parameter screen where you define the import.

Product Group

All products in the catalogue will be placed in the same product group. It is strongly recommended that you create and use a specific group for this catalogue. Do NOT attempt to use a product group you use for other products, or you will lose those other products when you re-import the catalogue in a later year. The product group can be created in the normal way on product group maintenance. As most catalogues have a three or four digit filename, e.g. ESPO, YPO, etc., we recommend you use this as the group code. It is the nominal costs field from the product group that will provide the default nominal code.

Supplier Code

This is an optional field. Products may have a default supplier attached to them. If you enter a supplier here, it will be entered as the default supplier against all products in the import.

Prefix

This field is also optional, but it is recommended that you use it. Use the same three or four letter code you used for the product group, with a hyphen. This prefix will be attached to all product codes. This will make the products in this catalogue more easily identifiable. It will also enable the same product code to exist on different catalogues.

Fields 1-7

This is where you state the fields that are to be imported. The drop-downs will show you which fields you are allowed to import. The order in which you specify these fields must match the order of the columns in the spreadsheet. The product code and product description are mandatory. Any other fields you want to import from the spreadsheet, up to a maximum of seven in total, may be specified as well.

> Advice: Product descriptions in Resource are limited to 50 characters in length. If the descriptions provided in the catalogue are longer than this, you may find it an advantage to create a new column in the spreadsheet for description, and populate this with a default value. Import this into description. Then import the real descriptions into the Resource "long description" field, which has no size limit.

Performing the import

Go to the spreadsheet, and copy the entire grid - all rows and all columns – to the clipboard. Now go back into Resource, and move to the data tab. This shows an empty grid. Use the R32000 "paste new rows" option on the first, empty, line of the grid, and paste the data into the grid. This is standard Resource functionality, and it is assumed that the user already knows how to do this. If your catalogue is large, this paste may take several seconds.

Now move back to the parameters tab, and click the import button. If you catalogue has several thousand lines, as most do, you will see a progress bar, "Catalogue Product Import Progress", "Doing PL List". At the end of this process, you will be asked to confirm that you want to import the products. At this stage you can say "No" to cancel the import. If you wish to import, say "Yes".

The process will now continue. It will be visibly slower to progress this time. It is not possible to predict how long the process will take, as client installations vary enormously. When it is finished, there will be a message box saying it is done.

Please note that the import of any catalogue starts by deleting all products from the product group used, and that are in the new import. All previously existing products in this group, which are not in the new catalogue, are set to dormant. They are not deleted.