



Data File Importing in Adempiere



DOCUMENT SUMMARY SHEET

How To
Import Records HowTo Guide
HowTo - Data File Importing in Adempiere.odt
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NOTES

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Adempiere provides the capability to import data from other systems.

There are a number of ways of bringing external data into Adempiere including which require programmer involvement. There is also a standard method which does not require programmer involvement.

This HowTo guide demonstrates the use of the method not requiring programmer involvement. This method utilises the Import Loader process available from the standard Adempiere menu to users whose role has been granted access to the relevant windows and processes.

There are many 'Import Loaders" and more are added as people find a need for them.

The available import loaders at May 2012 are as follows:

🛅 Import Business Partner 🔚 Import Product 🖷 Import Contact 📲 Import Price List 🔚 Import Product Planning 🖷 Import Account 📲 Import Report Line Set 🖷 Import Inventory 🖷 Import Order 📲 Import Invoice Import Confirmations - The Import Currency Rate 📲 Import Request - 🛅 Import GL Journal - 🛅 Import Payment -📲 Import Payroll Movement 📲 Load Bank Statement 🖷 Import Bank Statement

Imports can also be used in an automated fashion by using the Adempiere Scheduler to cause the import table to be updated with new data at regular intervals. A second Scheduled task can then run the import process to import the records into the Adempiere tables. Note that timing of these scheduled processes may need to be carefully arranged.

The process of using the Adempiere Import Loaders is the same for all import types. This document uses the import of Products as an example of how the process is used.



2.1 Some Things to Note

Adaxa

A record can be created with an Organisation of * which means it can be seen and used by all Organisations in the system. If it was created with a particular organisation value then it would only be able to be used in that Organisation.

Note that the 'Price Lists' that Products appear on may need to be created on "a one per Org" basis because price list defines (amongst other things) the currency. So if an AU company is to buy things in AUD then they must appear on a price list denominated in AUD (etc).

So, when adding records, consider carefully whether they need to be set as Organisation = * or with a particular organisation's value. Note that there is a process to change the Org that owns a Product. It is called "Product Organisation". If a Product is added with the incorrect Organisation it is quite easy to correct.

There are a number of fields on the Product Import that are mandatory. Your import may fail if you do not have all these present in your import loader. A commonly missed item is "Business Partner" which is used to set up information about who the product is purchased from. If you don't have the information to hand then create a Business Partner called "Default Supplier" and use this value in the import data.

The "Import Error Message" in the Import Product window should warn you of any missing mandatory columns.





2.2 Product Category Window

2.2.1 Supporting Tables

Some imports require that data exists in other tables before an import can takes place. Examples are "Business Partner Group" must exist before it can be set when importing Business Partners. There are many other instances and these are usually apparent in the relevant Import window.

2.2.2 Product Category Tab

Before Products can be added to the system the Product Categories need to be created. Remember to choose the correct Organisation value when creating the Product Categories!

F	Product Ca	tegory PBoxes Packagi	ng - Boxes SuperUser@
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4	• 🕐	📑 👼 🔆 📄 💈	🔄 0 🕫 📼 🚳 🏠 🌩 👗 🛧 🛨 💆 🗏 🛎
[Product Category	Client	Organization ×
	Accounting	<u>S</u> earch Key	PBoxes
		<u>N</u> ame	Packaging - Boxes
	Assigned Products	<u>D</u> escription	
			✓ Active
		<u>P</u> arent Product Category	
		<u>M</u> aterial Policy	FiFo
			✓ D <u>e</u> fault ✓ Se <u>l</u> f-Service
		Planned Ma <u>r</u> gin %	0.0
		Asset <u>G</u> roup	▼
		Print <u>C</u> olor	Black 🗸

2.2.3 Product Account Codes Tab

Note that when a Product is added to the system, account codes are set for Revenue account, COGS account, Inventory account etc. This information is inherited from the values in the Product Category Accounting Tab of the Product Category selected for the Product.

Set the accounting values that apply to each Product in each Product Category:



Product Ca	ategory PBoxes Packagir	ng - Boxes SuperUser@			- (
<u>F</u> ile <u>E</u> dit	<u>V</u> iew <u>G</u> o <u>T</u> ools Winde	ow <u>H</u> elp				
• 0	📑 🔂 🔆 📄 😒	ol 🖉 📼 💿 😭	•	🔹 🛧 🛧 👻 ;	£ 🗉 🖬 🖉	
Product Category	Client			Organization	×	
Accounting	Product Category	Packaging - Boxes				
	Accounting Schema	AUD_Schema				
Assigned Products		✓ <u>A</u> ctive				
	<u>C</u> osting Method		-	Costing <u>L</u> evel		-
	<u>P</u> roduct Asset	HC-11505	6	Product <u>E</u> xpense	HC-21005	e
	C <u>o</u> st Adjustment	HC-51001	6	Inventory Clearing	HC-21005	<u>é</u>
	P <u>r</u> oduct COGS	HC-51005	6			
	Purchase Price <u>V</u> ariance	HC-54005	6	I <u>n</u> voice Price Variance	HC-54000	Ĩ
	<u>T</u> rade Discount Received	HC-54015	6	Tra <u>d</u> e Discount Granted	HC-41089	<u>é</u>
	Prod <u>u</u> ct Revenue	HC-41005	<u></u>			
		Copy Accounts				

The account codes set here will copy down to each newly created product where this Product Category is selected during the add process.

Note the "Copy Accounts" button. If clicked, this button will reset the account codes of all Products that have this Product Category thus allowing a bulk update of accounting codes. The actual accounting is done based on the account codes stored in the Product record. The values displayed in the Product Category – Accounting tab are only there to provide a default set of values when a new product is added.

The Org value is not important in the account code as the correct Org value for the accounts posting will be picked up from the document being processed and substituted in to the account combination used for the posting.



2.3 Units of Measure Window

You may need to add any units of measure used by your products if they do not already exist. The Unit of Measure window displays the existing values and lets you add new values.

ile <u>E</u> dit	⊻iew <u>G</u> o <u>T</u>	ools Window	<u>H</u> elp						
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Jnit	Client	Organization	UOM Code	Symbol	Name	Description	Active	Default	Standard Precisio
f Measure	System	×	DA	d	Day		~		:
Conversion	System	*	EA	Ea	Each		~	✓	1
	System	*	HR	h	Hour		~		
	Group	×	KG	Kilo	Kilogram	Kilogram	~		
	Group	×	LTR	Litre	Litre	Litre	~		
	Group	×	MTR	Metre	Metre	Metre	~		
	System	*	MJ	m	Minutes	(lowest unit for resorce assigments)	~		
	System	*	мо	m	Month	30 days	~		:
	System	×	WK	w	Week		~		1
	System	×	WD	D	Work Day	8 hour	~		
	System	×	WM	м	Working Month	20 days	~		
	System	×	YB	у	Year		~		:

Note how all the displayed values have an Org value of * so they can be used buy all Organisations.

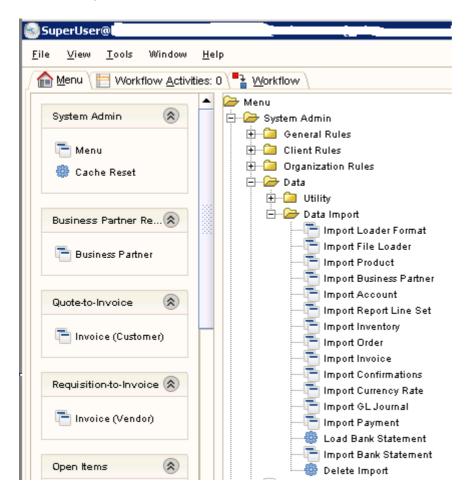
Some records have a Client value of "System" indicating that they were created at System level and are available to all Clients within the System. A Client is usually a company or group of companies. Many values such as country, states, some UOMs, etc are held at System level to avoid having to create multiple copies of them.



3 The 'Importing Products' Process

3.1 Data Import Menu

The Data Imports windows are in their own menu section as shown below:





3.2 The Import Process

The required steps (in summary) are as follows:

- Use the "Delete Import" process to clear out any earlier work and start with a blank import table. [The system does not require this but it makes the process clearer and may prevent a user error. Imported records are flagged as "Is Imported" and are ignored in later runs of the importer.]
- Create an "Import Loader Format" this is a list of data columns that maps the columns in the Adempiere Import table to the columns in your data to be imported. This data can be in many formats but from here on the data to be imported will be regarded as coming from a spreadsheet saved in CSV format.
- Create the file with the data to be imported (probably a spreadsheet)
- Use the "Import File Loader" to copy the data from your spreadsheet file into the Import Product Table – note that this table is just a staging area to temporarily capture the data inside the Adempiere database, the actual Product record in Adempiere is not created by this process.
- Open the Import Product window to review the data you have imported, click the "Import Products" button to start the import into Adempiere Product and product related tables.

The following sections show the detail.

3.3 The Import Loader Format Window

3.3.1 The Import Format Tab

If an Import Loader Format exists then you can simply use it. If one exists but does not contain all the columns that you need then you can modify it to add (or delete) columns. The system allows you to create a new loader format and copy the columns from an existing format for modification or addition.

The Import Loader Format looks like the following when opened in grid view. Note that the displayed records are all owned by * so they can be used for importing by all Organisations



🖶 Import	Loader Forma	at Product Import SuperUser@			
<u>F</u> ile <u>E</u> di	it <u>V</u> iew <u>G</u> o	<u>T</u> ools Window <u>H</u> elp			
5 () 📑 📷 :	× 🗐 😂 🍳 🛛 🖓 🔀	圆 🏠 🌩 🔶 著 🋧 🋫 👱		🌢 🌢 🔍 🍡 🔜 😣
Import	Organization	Name	Description	Active	Table 🖫
Format	×	Accounting - Accounts	Based on the format of AccountingUS.cvs import	~	I_ElementValue_Import Account
Format	×	Accounting - Balance Sheet	US Balance Sheet info in the format of Accountin	~	I_ReportLine_Import Report Line Set
Field	×	Accounting - Profit&Loss Statement	US Profit & Loss Statement info in the format of A	✓	I_ReportLine_Import Report Line Set
	×	Accounting - Tax Balance Sheet	US Tax(1120) Balance Sheet info in the format of	~	I_ReportLine_Import Report Line Set
	×	Accounting - Tax Profit&Loss Statement	US Tax (1120) Profit & Loss Statement info in the f	~	I_ReportLine_Import Report Line Set
	×	Business Partners	Import Business Partners	~	I_BPartner_Import Business Partner
	×	Currency Rate Import		~	I_Conversion_Rate_Import Conversion Rate
	×	GL Journal	Import GL Journals (Actual and Budget)	~	I_GLJournal_Import GL Journal
	×	Inventory	Import Inventory Counts	~	I_Inventory_Import Inventory
	*	Invoices	Import Sales and Purchase Invoices	~	I_Invoice_Import Invoice
	×	Orders	Import Sales and Purchase Orders	~	I_Order_Import Order
	*	Order .		~	I_Order_Import Order
	×	Product Import	Import Products	~	I_Product_Import Product
	*	Report Lines for Trixan		~	I_ReportLine_Import Report Line Set

Looking at the **Product Import** Format in form view shows the following.

i Imp	oort Lo	ader Forn	nat Product)	mport Supe	rUser@]			_	bser	vera{	webse	ervera-xe	e-adem	piere]	}]		
<u>F</u> ile	<u>E</u> dit	<u>V</u> iew <u>G</u>	o <u>T</u> ools W	indow <u>H</u> elp													
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		<u>F</u> ormat	Comma Sepai	ated			-										
				<u>C</u> opy	Lines												

From this you can see that it is expecting data in a comma separated file format (a save option in Excel). Note that it is possible to select 'custom' separator and then a custom separator value. Some versions of Adempiere had a bug that required you to do this rather than just selecting (say) CSV.

3.3.2 The Format Field Tab

The Format Field Tab displays which fields have been selected in the loader format.

Some things to note:



The "Name" of the column is text selected by the user. It is helpful if that text indicates whether the expected value in the import file is an ID (a number like Org_ID = 1000004) or a Code or Value, or a sundry piece of text such as may go in a note or a description. So, choose a name like "Org_ID" if the expected data is the ID of the Org, "Org_Code" if the expected value is its code (called Value or Search Keyin Adempiere)

Dates (not used here are best defined as being in the format yyyyMMdd and entered as 20101231 in your data file. This prevents Excel from causing you date problems.

The "Start Number" is the column number in your spreadsheet where this data may be found.

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port	Client	Organization	Import Format	Sequence Name	Active	Column	Data Type D 🔻	Start
rmat	Group	×	Product Import	20 Organisation	~	AD_Org_ID_Organization	String	
ormat	Group	×	Product Import	30 Search Key	~	Value_Search Key	String	
ield	Group	*	Product Import	40 Name	~	Name_Name	String	
	Group	×	Product Import	50 Description	~	Description_Description	String	
	Group	*	Product Import	60 Document Note	~	DocumentNote_Document Note	String	
	Group	*	Product Import	70 Comments	~	Help_Comment/Help	String	
	Group	×	Product Import	80 UPC/EAN	~	UPC_UPC/EAN	String	
	Group	*	Product Import	90 SKU	✓	SKU_SKU	String	
	Group	×	Product Import	100 UOM	~	X12DE355_UOM Code	String	
	Group	×	Product Import	110 Product Category	~	ProductCategory_Value_Product Category Key	String	
	Group	×	Product Import	120 Product Type	~	ProductType_Product Type	String	
	Group	×	Product Import	130 Classification	~	Classification_Classification	String	
	Group	×	Product Import	140 Volume	✓	Volume_Volume	Number	
	Group	×	Product Import	150 Weight	~	Weight_Weight	Number	
	Group	×	Product Import	160 Shelf Width	~	ShelfWidth_Shelf Width	Number	
	Group	*	Product Import	170 Shelf Height	✓	ShelfHeight_Shelf Height	Number	
	Group	×	Product Import	180 Shelf Depth	~	ShelfDepth_Shelf Depth	Number	
	Group	×	Product Import	190 Units per Pallet	~	UnitsPerPallet_Units Per Pallet	Number	
	Group	*	Product Import	200 Image URL	~	ImageURL_Image URL	String	
	Group	×	Product Import	210 Description URL	~	DescriptionURL_Description URL	String	
	Group	×	Product Import	210 description URL	✓	DescriptionURL_Description URL	String	
	Group	*	Product Import	220 Business Partner K	~	BPartner_Value_Business Partner Key	String	
	Group	×	Product Import	230 Currency	~	C_Currency_ID_Currency	String	
	Group	*	Product Import	240 List Price	✓	PriceList_List Price	Number	
	Group	×	Product Import	250 PO Price	~	PricePO_PO Price	Number	
	Group	×	Product Import	260 Partner Product No	~	VendorProductNo_Partner Product Key	String	
	Group	*	Product Import	270 Partner Category	~	VendorCategory_Partner Category	String	
	Group	×	Product Import	280 Manufacturer	~	Manufacturer_Manufacturer	String	
	Group	*	Product Import	290 Minimum Order Qty	~	Order_Min_Minimum Order Qty	Number	
	Group	×	Product Import	300 Order Pack Qty	~	Order_Pack_Order Pack Qty	Number	
	Group	×	Product Import	310 Cost per Order	~	CostPerOrder_Cost per Order	Number	
	Group	×	Product Import	320 Promised Delivery	~	DeliveryTime_Promised_Promised Delivery Time	e Number	
	•							

Sorted: #32



Looking at the same records in Form view shows the following:

🖬 Import	Loader Format	: Search Key SuperUser@
<u>F</u> ile <u>E</u> dif	t <u>V</u> iew <u>G</u> o	<u>T</u> ools Window <u>H</u> elp
5 0) 📑 🔂 🌶	< 🔲 😂 🔍 🛈 🖓 📼 💩 🏤 🌩 著 🛧 👻 👱 🗏 📾 📥 🙊 🍡 🐼 🔳 😣
Import Format	Client	Group Organization *
Format	Import Format	Product Import
Field	<u>S</u> equence	30 🔳
	<u>N</u> ame	Search Key
		✓ Active
		Value_Search Key 👻
	<u>D</u> ata Type	String
	S <u>t</u> art No	3
	Ca <u>l</u> lout	
	Script	

3.4 Creating a Template Spreadsheet for Import Loading

Using a Report from Adempiere can assist you in creating the headings for a file into which you can paste data and know that the columns are properly configured. The following is a method of quickly setting up data for import in a reliable manner.

From a Format Field record, click on the Report Icon in the Toolbar and select 'Report' (we have created special report which contains only the Start Number and the Name as shown below)

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. 0	🗐 🖬 🔊	
mport	Client	Tribian Group Organization * Import Columns list
	<u>S</u> equence <u>N</u> ame	Product Import
		20 🔳
		0vg_10
		✓ Active
	Çelumn	AD_Org_ID_Organization
	Data Type	String .
	Start No	2
	Callout	
	Script	



The Report shows:

ADempier	e	Import Columns list
Paramet	er: Format Field = Org_ID	
Start No	o Name	
2	Org_ID	
з	SearchKey ProdCode	
4	Name	
5	Description	
6	Document Note	
7	Comments	
8	UPC/EAN	
9	SKU	
10	UOM X12DE355 code	
11	Product Cat Key	
12	Prod Type I=Item	
13	ClassificationABC	
14	Volume	
15	Weight	
16	Shelf Width	
17	Shelf Height	
18	Shelf Depth	
19	Units per Pallet	
20	Image URL	
21	Description URL	
21	description URL	
22	Business Partner Key	
	-	

- 23 Currency
- 24 List Price

Adempiere®

SuperUser@Trixan Group.Trixan Pty Ltd [webservera-{webservera-xe-adempiere}]

ADempiere

Import Columns list

Start No	Name
25	PO Price
26	Partner Prod Key
27	Vend Partner Cat
28	Manufacturer
29	Minimum Order Qty
30	Order Pack Qty
31	Cost per Order
32	Promised Deliv Days
33	Price Limit
34	Price Std



Export the Report to Excel then open the file.

	Microso	ft Excel - export	columns	. yls			_ [□]	x
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	A	B	С	D	E	F	G	
1	Start No	Name						
2	2	Org_ID						
3	3	SearchKey ProdCode						
4	4	Name						1
5	5	Description						1
6	6	Document Note						1
7	7	Comments						
8	8	UPC/EAN						1
9	9	SKU						
10	10	UOM X12DE355 code						1
11	11	Product Cat Key						1
12	12	Prod Type I=Item						1
13	13	ClassificationABC						1
14	14	Volume						1
15	15	Weight						
16	16	Shelf Width						
17	17	Shelf Height						
18	18	Shelf Depth						
19	19	Units per Pallet						
20	20	Image URL						
21	21	Description URL						
22	21	description URL						
23	22	Business Partner Key						
24	23	Currency						
25	24	List Price						1
26	25	PO Price						
27	26	Partner Prod Key						
28	27	Vend Partner Cat						1
29	28	Manufacturer						1
30	29	Minimum Order Qty						
31	30	Order Pack Qty						
32	31	Cost per Order						
33	32	Promised Deliv Days						
34	33	Price Limit						
35	34	Price Std						
36								1
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39								
40					(-
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Select and Copy / Paste Special / Transpose the highlighted area.



Paste Special	? ×
Paste	
⊙ <u>A</u> ll	🔿 Validatio <u>n</u>
C Eormulas	C All except borders
○ <u>V</u> alues	C Column <u>w</u> idths
O Formats	C Formulas and number formats
\bigcirc Comments	$\mathbb C$ Values and number formats
Operation	
None	C Multiply
○ A <u>d</u> d	C Dįvide
C <u>S</u> ubtract	
🗌 Skip <u>b</u> lanks	Transpose
Paste Link	OK Cancel

As shown below, this will create a template with the columns in the right order into which you can insert your Product data. Delete rows 1 to 37 before you start.

22	Microso	ft Excel - export	columns	.xls							_	
: 20		t <u>V</u> iew <u>I</u> nsert F <u>o</u> ri			a Window	Help AbleBits.	com	Type		estion for help		
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1	📬 🛃 🔓	3 🛃 💁 📾 🖤 📖	🔏 🗈 🛍	L - 💖	' 🔊 🗕 (°' -	- 🤮 Σ - Ż↓ :	X 🛄 🥪	100% -		÷		
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1	Start No	Name										
17	17	Shelf Height										
18	18	Shelf Depth										
19	19	Units per Pallet										
20	20	Image URL										
21	21	Description URL										
22	21	description URL										
23	22	Business Partner Key										
24	23	Currency										
25	24	List Price										
26	25	PO Price										
27	26	Partner Prod Key										
28	27	Vend Partner Cat										
29	28	Manufacturer										
30	29	Minimum Order Qty										
31	30	Order Pack Qty										
32	31	Cost per Order										
33	32	Promised Deliv Days										
34	33	Price Limit										
35	34	Price Std										
36												
37												
38	Start No	2	3	4	5	6	7	8	9	10		
39	Name	Org_ID	hKey Prod	Name	Description	Document Note	Comments	UPC/EAN	SKU	UOM X12DE35	5 code	
40		I										

Now add the Product data you need to import under the relevant headings.



	A	В	С	D	E	F	G	Н		J	
1	Start No	2	3	4	5	6	7	8	9	10	
	Name	Org_ID	SearchKey	Name	Description	Document Note	Comments	UPC/EAN	SKU	UOM	Pr
2			ProdCode							X12DE355	
		1000001	ABC001	Name of Product	Descrip of Product	Doc Note for	<comments< td=""><td>A12345</td><td>ABC001</td><td>Ea</td><td></td></comments<>	A12345	ABC001	Ea	
3				ABC001	ABC001	Product ABC001	>				
		1000001	ABC002	Name of Product	Descrip of Product	Doc Note for	<comments< td=""><td>A12346</td><td>ABC002</td><td>Ea</td><td></td></comments<>	A12346	ABC002	Ea	
4				ABC002	ABC002	Product ABC002	>				
		1000001	ABC003	Name of Product	Descrip of Product	Doc Note for	<comments< td=""><td>A12347</td><td>ABC003</td><td>Ea</td><td></td></comments<>	A12347	ABC003	Ea	
5				ABC003	ABC003	Product ABC003	>				
		1000001	ABC004	Name of Product	Descrip of Product	Doc Note for	<comments< td=""><td>A12348</td><td>ABC004</td><td>Ea</td><td></td></comments<>	A12348	ABC004	Ea	
6				ABC004	ABC004	Product ABC004	>				
		1000001	ABC005	Name of Product	Descrip of Product	Doc Note for	<comments< td=""><td>A12349</td><td>ABC005</td><td>Ea</td><td></td></comments<>	A12349	ABC005	Ea	
7				ABC005	ABC005	Product ABC005	>				

Now save the Excel file as (say) ImportProducts.xls

Now using "Save As" and selecting the MSDOS CSV format option, save the Excel file again as ImportProducts.csv.

If you need to import data from an existing file exported from an old system where you can not vary the order of the columns in the output file you can use the technique that is used by Adaxa staff in many implementations to utilise an existing import loader format and just let Excel do the column ordering. The process works as follows:

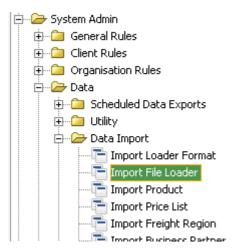
- Receive a CSV file from the 'old' system and open in Excel (file 1)
- Insert 20 or so columns to the left of column A in file 1
- Use a standard Import Loader Format, export a Report to Excel as File 2, use Copy/Paste/Transpose as described above to copy the required headings into the blank columns in the file 1.
- In File 1 in Cell A2 enter a formula like "= $X2^{\prime\prime}$ to copy (say) the product code value from the old system data (now in Column X) into column A.
- Fill in any columns of data required by Adempiere and not in the old system file and copy down to capture all the records then save as an XLS file.
- Use Copy / Paste Special / Values and save a copy as a CSV file then open that and delete all the 'old' columns and save.

Hint: Leave the column headings in the csv file. You can use them in the next step to confirm that the columns of data 'line up' with the import loader format.



3.5 Importing the Data into the Adempiere Staging Table

3.5.1 Open the Import Loader Window



Select the CSV file containing the data you wish to import in the field showing <select file to load>

Select the Import Loader Format that matches the column layout of the CSV file from the dropdown list

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<u>F</u> ile ⊻iew	<u>T</u> ools Winde	ow <u>H</u> elp						
<select fi<="" td=""><td>le to Load></td><td>vindows-1252</td><td>-</td><td>Import For</td><td>rmat</td><td></td><td>▼ <</td><td> ></td></select>	le to Load>	vindows-1252	-	Import For	rmat		▼ <	>
							×	✓



3.5.2 Import the Source File

Select the file to be imported and the Import Format to be used to interpret this file. The form will show the data to be imported and the left and right arrow keys will let you scroll through the records. Compare the data in the bottom boxes with the labels above to ensure a proper match.

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product impo	ort.csv windows-	1252 🔻 Recor	ds=2, Length=127	Import Form	nat Products		▼ < 1	>
	· · ·						egory,Product Type,Clas 0.00,0,No,Yes,ITD,Intou	
•	1000000							•
Value Nan	ne Description D	ocumentNote Help	UPC SKU	X12DE355 F	ProductCategory_Valu	e ProductType	BPartner_Value AD_Org_ID	Clas:
Search K Name	e Descriptio D	oc Note Commen	UPC/EAP SKU	UOM	UOM	P	Product Categ Product Ty	С
•			3993					►
							× <	

If you have left the column headings in the csv file then they will display as above and can be used as an extra check that the data in your csv file does in fact line up with the what the Import Loader Format expects. For example you can see that the Import Loader is expecting "Value" in column 1 and "Name" in column 2 and the first row of data, the headings from the CSV are showing "Search Key" and "Name" as expected.

3.6 Completing the Product Import

3.6.1 The Import Product Window displayed

Open the **Import Product** Window to see the records that have been imported into the Import Products staging table.

An individual record will display as follows.



🖶 Impor	t Product SuperUser	œ .			·	
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<u></u>	2 🔳 💼 🔆 🖥] 2 9. 0 /	📼 🔕 🏠 🐗	* * * *	± 🗉 🖬 🕹 🕹	🔍 🍡 🛃
Import	Imported	No		Product		
Product	Import Error Message					
	Client	Group	-	Organization	Pty Ltd	
	<u>S</u> earch Key					
	<u>N</u> ame					
	<u>D</u> escription					
	D <u>o</u> cument Note					
						-
	<u>C</u> omment/Help					
						-
ļ	<u>U</u> PC/EAN			s <u>k</u> u		
	UO <u>M</u> Code			UOM	Each	-
	<u>P</u> roduct Category Key			P <u>r</u> oduct Category	Packaging - Boxes	-
	Produc <u>t</u> Type	Item	-	C <u>l</u> assification		
	<u>V</u> olume		0 🔳	<u>W</u> eight		0 🔳
	S <u>h</u> elf Width		0 🔳	Sh <u>e</u> lf Height		0 🔳
	Shel <u>f</u> Depth		0 🔳	Units Per P <u>a</u> llet		0 🔳
		Discontinued		Discontinued <u>b</u> y		22
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	ISO Currency Code List Price			Currency PO Price	AUD	•
	List Price Standard Price		0.00	PU Price Limit Price		0.00
	Royalty Amount		0.00	Price effective		0.00
	Partner Product Key		0.00 🔳	Partner Category		20
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Manufacturer			
Minimum Order <u>O</u> ty	0 🔳	Order Pack Qty	0 🔳
Cost per Order	0.00 🔳	Promised Delivery Time	
	Import Products		Processed



3.6.2 Importing The Products

Click the Import Products Button and run the process.

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Import	<u>D</u> esc	ription													
Product	D <u>o</u> cumer	nt Note													
	Comment/Help														
	<u>U</u>	\cup_{UC} Imports products from a file into the application													
	<u>P</u> roduct Cate: Produ	Import Products will bring a file of products, in a predefined format into the application.													
	11000	The Parameters	are default values	for null impor	t record values, th	ey do not o	overwrite any data.								
	S <u>h</u> ∉	If you adopt on	orrighting price list	and man have	list Stondard and	Lincit Daio	e defined, they are								
i	She	directly created/		anu you nave.	List, Standard, and	Luini Fiic	e dennied, miey are	0 -							
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	lm.	Client	Group			-									
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	L Standa n							0.00							
	Royalty A			0.00	Price effe	ative		0.00 🥥							
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		acturer				· /		<u></u>							
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	Cost pe	r Order		0.00	Promised Delivery 1	ime		0							
			Import Products			Pro		2							

After the Product Import has taken place the **Product** field in the top right corner will display the created product code. To check the record, right-click on the code and zoom to the record.



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If there were any errors in the import the "Import Error Message" filed will contain a pointer to the error condition. NOTE that the message will NOT be visible unless you refresh the record you are looking at .

For added certainty, close and re-open the window before working through the error messages.

3.7 Clearing the Import Table

Before doing a new import it is often helpful to clean out all the old records in the Import Product Table by selecting that table in the "Delete Imports" window

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🏶 Dele	ete Import		- 🗆 🗵
Delete all data in Import Table			
You would delete all data in an import table, if there was a problem with data loading. The delete does not distinguish between imported and not imported data.			
Table	I_NAB_Transact_1000095 I_OpenPurchaseOrder_1000036 I_OpenSalesOrder_1000034 I_Order_591 I_Payment_597 I_PriceList_53173 I_Product_532 I_ReportLine_535		Start



It is possible to import prices through the Import Product window but it is easier to do it in the Import Price List window.



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