

OrderXpert Data Import Format

This document describes the file formats used to import data into OrderXpert.

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Section 1: Overview

OrderXpert PC can import your data from two different types of files:

1. **Tab-delimited text files** that must be formatted very specifically, as described in this document.
2. **Excel files** that generally are formatted as described in this document.

Excel template files can be found at writemoreorders.com/templates

Bold fields are required

If the file formats included here don't meet your needs, Upward Technologies can create a custom data import tool for you.

Section 2: Excel Files

- Can be either XLS or XLSX format.
- Must contain required fields, but other fields are optional.
- Columns do NOT need to be named to match these instructions.
- Columns do NOT need to be arranged in a specific sequence.
- You will be able to "map" the columns in your Excel file to the corresponding field in OrderXpert.
- You import these from the corresponding "Manage Data" screen, i.e. Manage Data>Customers for the customer data import.

Limitations

- Not all data can be imported using Excel files. This is indicated for each file in this document.

Section 3: Tab-delimited Text Files

- Columns must be arranged in exactly the same sequence as described in this document.
- Columns do NOT need to be named to match these instructions.
- Use Excel to create each file and then save it as a Tab-Delimited text file.
- Import the files into OrderXpert using the **Import Data from Text Files** menu which is found by clicking the **Manage Data** drop-down menu in OrderXpert PC.

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Section 4: Required Files

Customers - Excel and Tab-Delimited

Column Name	Data Type	Comment
CustomerNum	Text (20) PK	Your customer ID from your back end system.
Name	Text (50)	The company name.
TelephoneNum	Text (20)	The customer's telephone number. May not be "0". Duplicate telephone numbers are permitted and OrderXpert will automatically append an A, B, C, etc. to the phone number to make it unique. All non-numeric text is stripped from this value during the import process.
Address1	Text (50)	The customer's address line 1
Address2	Text (50)	The customer's address line 2
City	Text (30)	The customer's city
State	Text (25)	The customer's state
Zip	Text (25)	The customer's zip code. Dashes are removed from this value during the import process.
SalesmanName	Text (50)	The customer's salesman's name. Must not contain any single quotes, double quotes, or apostrophes
PriceLevel	Real	Values 0-19. Used to give a customer a special price level and each item can have a price assigned to this price level. A price level of 0 means that the customer gets the item's base price, which is the default behavior. Alternatively, you can assign a value between 0 and 1 and the customer will get a percentage discount. For example, entering 0.1 for the price level will give all of the items a 10% discount from base price for this customer.
ContactName	Text (50)	Contact name for this customer.
FaxNum	Text (20)	The customer's fax number. All non-numeric text is stripped from this value during the import process.
Modified		Leave Blank
SyncDelete		Leave Blank
SalesmanID	Text (50)	The internal ID from your back end system for the SalesmanName of this customer.
ContactPhone	Text (50)	The phone number for the contact name.
ContactEmail	Text (150)	The email address for the contact name. Can be multiple addresses separated by a comma or semicolon.
Terms	Text (50)	The payment terms for this customer.
Country	Text (50)	The customer's country.
UDF1	Text (50)	User-Defined field. Currently not printed or otherwise displayed in OrderXpert, but can be used in custom labels or reports.
UDF2	Text (50)	User-Defined field.
UDF3	Text (50)	User-Defined field.
UDF4	Text (50)	User-Defined field.
UDF5	Text (50)	User-Defined field.
TermsCode	Text (25)	Code or abbreviation for the payment terms name.
CustomerType	Text (50)	Type of customer, i.e., Designer, Store, Prospect, etc.

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Products - Excel and Tab-Delimited

Column Name	Data Type	Comment
MfgID	Text (50) PK	The Manufacturer ID (if supporting multiple product lines). If only one product line is supported this can be left blank or omitted.
ItemID	Text (25) PK	The Product ID for this item. Is the default value used to generate barcodes for your tags.
ItemName	Text (200)	The name of the product.
Dimensions	Text (50)	The size or dimensions of the product.
BasePrice	Currency	The base price of the product. This will be the price charged unless there is a special price or discounts applied.
SpecialPrice	Currency	If specified this will be charged instead of the base price. The price will be displayed as a discounted price on the orders. If there is no special price, then this value must be blank.
OrderMinimumQuantity	Integer	The minimum order quantity. Must be 1 or greater.
OrderMultipleQuantity	Integer	The multiple order quantity. Must be 1 or greater.
OnHandQuantity	Integer	The current on-hand quantity available to sell. Leave this value blank or 0 if you do not want to display on-hand quantities.
Category	Text (100)	The category of this product.
IntroDate	Text (20)	The internal date for this product as text. Need not be an actual date, i.e. Fall 2008 is acceptable.
UPC	Text (20)	The UPC code for this product for this product. UPC codes are optional and are checked if the scanned barcode can't be found based on Item ID. If you will only be scanning barcodes you generate from OrderXpert (item IDs) then you may not need to supply a UPC code.
PriceLevel1 through PriceLevel19	Real	Price given to customers with a matching price level, i.e. customers with a price level value of 1 get PriceLevel1 prices. The user can also select a price level on the scanner/PC so you can use price levels for container pricing as well.
Modified		Leave blank
SyncDelete		Leave blank
PieceBox	Integer	The number of this product that are packaged together in a box when ordered by container. Must be 1 or greater.
Cubes	Real	The volume of a container that a box of this item consumes.
UnitOfMeasure	Text (50)	The unit of measure, i.e. EACH, SET, PAIR
UDF1 Through UDF9	Text (50)	User-Defined fields. Currently not printed or otherwise displayed in OrderXpert, but can be used in custom labels or reports.
Notes	Text (200)	Notes on the product. Currently not used in OrderXpert.
PhotoName	Text (100)	Optional filename for the image to display for this product. If this is not specified, the system will attempt to match based on ItemID (ItemID ABC123 will be matched to image file ABC123.jpg)
UnConfigurable	Text (1)	If Product Options are used, this field can be used to hide the "Options" tab on the scanner. Any non-blank value will hide it.
ExcludeFromPromo	Text (1)	If Promotions are used, this field can be used to exclude specific items from the promotion. Any non-blank value will cause a selected promotion to NOT be applied to this product.
PriceLevel10 through PriceLevel19	Real	Additional price level fields. See PriceLevel1 through PriceLevel9 above for details.
RelatedItems	Text (big)	A comma-separated list of ItemID values related to this item.

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Ship To - Excel and Tab-Delimited

Column Name	Data Type	Comment
CustomerNum	Text (20) PK	Your back end system customer ID. This must match the CustomerNum field in the ImportCustomer table.
ShipToCode	Text (50) PK	A unique identifier for the ship to address from your back end system.
Name	Text (50)	The ship to name.
Address1	Text (50)	The ship to address line 1.
Address2	Text (50)	The ship to address line 2.
City	Text (30)	The ship to city.
State	Text (25)	The ship to state.
Zip	Text (25)	The ship to zip.
Country	Text (25)	The ship to country.
ContactName	Text (25)	The ship to contact name.
ContactPhone	Text (25)	The ship to contact phone number.

Section 5: Optional Files

Product Availability - Excel only

Can be used to update on hand quantity without importing the entire product data file

Column Name	Data Type	Comment
MfgID	Text (20)	The Manufacturer ID (if supporting multiple product lines). If only one product line is supported this can be left blank or omitted.
ItemID	Text (25)	The ItemID that corresponds to an ItemID value in the Products file.
OnHandQuantity	Integer	The current on-hand quantity available to sell. Leave this value blank or 0 if you do not want to display on-hand quantities.

Product Options - Tab-Delimited only

If you want to be able select options for your items.

Column Name	Data Type	Comment
MfgID	Text (20)	The Manufacturer ID (if supporting multiple product lines). If only one product line is supported this can be left blank or omitted.
OptionID	Text (25)	The option's unique identifier.
OptionType	Text (25)	The option's type. The list of options on the scanner will be grouped by this value.
OptionDesc	Text (100)	The option's description
UpCharge	Currency	The amount that will be added to the parent product's price.

Additional UPC - Tab-Delimited only

Can be used to link more than one UPC to an item.

Column Name	Data Type	Comment
MfgID	Text (20)	The Manufacturer ID (if supporting multiple product lines). If only one product line is supported this can be left blank or omitted.
UPC	Text (25)	The UPC Code.
ItemID	Text (25)	The ItemID that this UPC code corresponds to. Must exist in the Products file.
Price	Currency	The price of this product.

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Customer Price Levels - Tab-Delimited only

Can be used to link more than one price level to a customer & company combination.

Column Name	Data Type	Comment
MfgID	Text (20)	The ID of the company/brand for the price level.
CustomerNum	Text (20)	The customer ID from your back end system. Must exist in the Customers file.
PriceLevel	Real	The price level value for the MfgID and CustomerNum combination. See Customer.PriceLevel definition for details.

Customer Credit Cards - Tab-Delimited only

Can be used to allow one or more credit cards "on file" to be selected for a customer's order

Column Name	Data Type	Comment
CustomerNum	Text (20)	The customer ID from your back end system. Must exist in the Customers file.
CardInfo	Text (100)	The text that will be displayed for the user to choose. Also will print on the order copy. NOTE: do not include full credit card numbers in this field as it is insecure and unencrypted. Use something like "AMEX ending in 1234" or "VISA 4321 Exp 04/2020."

Customer Salesman - Tab-Delimited only

Can be used to link more than one salesperson to a customer.

Column Name	Data Type	Comment
CustomerNum	Text (20)	The customer ID from your back end system. Must exist in the Customers file.
SalesmanName	Text (50)	The name of the salesman.
SalesmanID	Text (50)	The salesman ID from your back end system.

User Information - Tab-Delimited only

This is the same information you can edit from the Users tab on the Program Options screen. You can use this

- If you want to password protect the scanner app so that a user must enter a password to begin.
- If you want to print the user's information on the customer's copy of the order printout.

Column Name	Data Type	Comment
UserName	Text (50)	The name of the user/salesperson. If importing information for salepeople, this value must exactly match the SalesmanName value in the Customer file.
EmailAddress	Text (100)	The user's email address.
Telephone	Text (25)	The user's telephone number.
Password	Text (20)	The user's password.