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External Order Import - Add On

Angie K - 2022-07-26 - in ASI SmartBooks Knowledgebase

External Order Import allows you to import an order or to import products into a new or existing order. This allows orders to be created in ASI SmartBooks quickly and easily without potential keying errors.

Accessing External Order Import

Default Folder Setup

Go to t	he Tools tab and c	open Compan	y Setup		
	Tools				
	📰 Company Setup	System Log	Mappings		
	System Preferences	📃 Job Queue	📕 Delete Data		
	Exception Log	Record Audit			
		Control			
	Expand	the System [)efaults and l	ocate the Ext	ernal Orders
System Defaults	File & Ir	nported Exter	nal Orders Fi	le Folder field	ds.
External Orders File Folder	-C:XML_Files				
Imported External Orders File Folder	C:\XML_Files\Imported				

Enter the path and folder name or use the browse button, navigate to the folder that you wish to use for the External Order File Folder. Repeat this process for the Imported External Orders File Folder.

External Orders File Folder—This is the file folder that will default into the ASI SmartBooks External Order import window. Any import files in this folder will appear in the import display for importing. This location can be changed at the time of importing.

Imported External Orders File Folder—This is the file folder that will default into the ASI SmartBooks External Order import window. Once a file is imported and the order is saved in ASI SmartBooks, the import file will be moved to this folder for reference. This can be changed at the time of importing.

Accessing the External Order Import

The External Order Import is accessed through an Order Manager or Order-New function



Creating an Order through the External Order Import

Select Import from the toolbar from the Order List or Order - New.

-			/					
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			Quote	(Select)	Q, Edit	Program	(5)	
r 7	Bill To Name 🛛 🍸 🤅	stylus 🛛 🟹	Order 1	11		Customer	(\$)	
110	Central State University	Open	Salesper	son				
109	University of Northern Jowa	Open	∧ Or	der				
108	Covenant Medical Senter	Open			1		_	

Select External Orders in the window that opens.



The XML files located in your External Order Folder will appear in the import display.

The XML file's Customer Name, PO/Reference, Description (from the first product in the file) and the total number of products contained in the file will be displayed.

					- ×
Import Source	Carboner	Foliaterme	Find Product		
	Alied Insurance	120801-45738	20042 Bank solut sik weated pique pairs shirt with typping. 6.5 or. Featuring 30% conton, treated for color bonding and pill resistance, a generoux 45, double-needle sthoring and an extended tail, right siene logo embroidery.	1 0	
Orders	🕨 🖂 Welmark Bue Cross & Shield	164013	00157 Key Tags - Close Out Lighted Key Tag-	M R	_
	General Hospital	45647	WPC-ASCM-P'Mug - Coffee Stoneware 11 et - Drop Ship	M 🔿	_
	University Of Northern Jowa	85285.228	\$P103 Coseout. Silver plated star shaped award with	M 🔍	_
EDI Orden					-
	Products selected for import External Orders Polder CUMAL, Files	-			[import]
	indexed orders raibe Count's rectain	bouled.			

Click an XML file's icon to view the product information from the file.

The Product's Code, Description, Vendor, Vendor SKU, Category, Quantity, Price and Cost, the XML file's location and name will be displayed in the expander's footer.

Select Impo	rt		- >	1			
Import Source	Customer	PO/Reference	First Product	-			
Laborad .	Alied Insurance 12001-45738		20043 Bank adult sik-wahed pique polo shirt with tipping. 6.3 cc. Festuring 30% cotton, treates for cours bonding and pill resistance, a generous 11, double-needle sthoting and an extended bill, right sievel logo entrollery.				
Orders	Code	Description	Vender Vender 307 Category	Π			
EDI Orden	20042	Bank adult sik-weshed pipe polo shirt with tipping 6.5 cc. Featuring 200% cotton, twende the cour bonding and pill resistance, a generous fit, double-needle stitching and an extended tail, right seeve loop embroiters.	40188 20042 24 255.0000 825.000				
	. Other	Product Options 5-XL; Optional sizes	40788 Other 4 \$1,2500 \$0,7500				
	CVML, File/Order402.ml						
	Weimark Blue Cross & Shield 954013		00757 Key Tags - Cose Out Lighted Key Tag. 🛒 (1)	M 🛛			
	Code	Description	Vendor Vendor SID Calegory Quantity Price Cent				
	Products select britemal Orders Fold Imported Orders Fold	ted for import COML_Files COML_File(imported	Import	1			

Selecting to import— Select an XML file to be imported by either checking the box for an XML file or expanding the XML file section and checking the box next to the products that you want to import.

Browse— You can use the Browse icon to change the location for the External Order files.

Refresh— Click the Refresh icon to update the list of XML files displayed for importing.

Import—The selected information will be imported, creating an ASI SmartBooks order. At this point the order can be changed, saved or cancelled.