# ASICOMP.COM

## How Do You Import an External Order?
Tammy Mason - 2017-09-11 - in Quotes, Orders & Invoices

## How Do You Import an External Order?

**External Order Import** allows a user 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.

### Default Folder Setup

To make importing external orders more efficient, default folders can be setup in Company Setup.
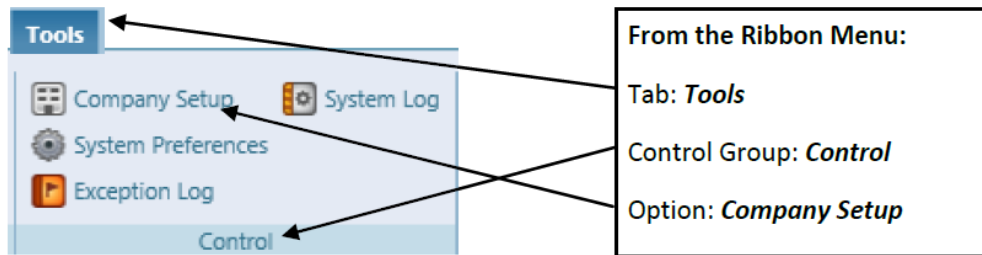


Expand the System Defaults and locate the External Orders File & Imported External Orders File Folder fields.



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, and the External Orders Pending Approval 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:
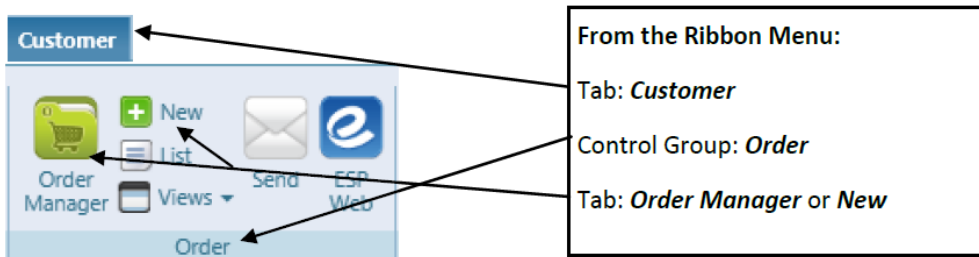


**Creating an Order through the External Order Import:**
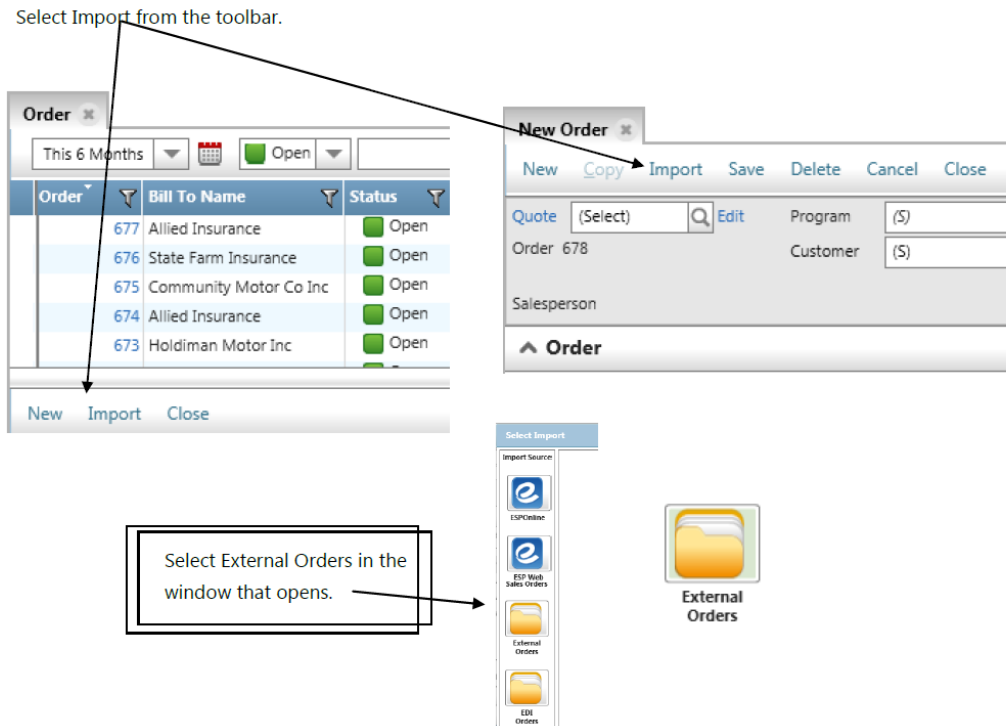
The XML files located in your External Order Folder will appear in the import display.

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.



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.
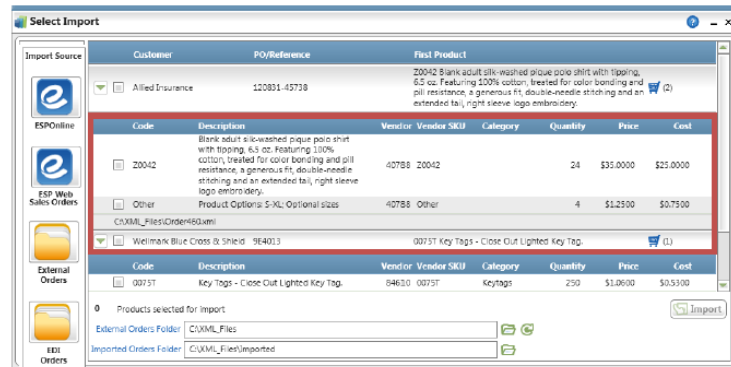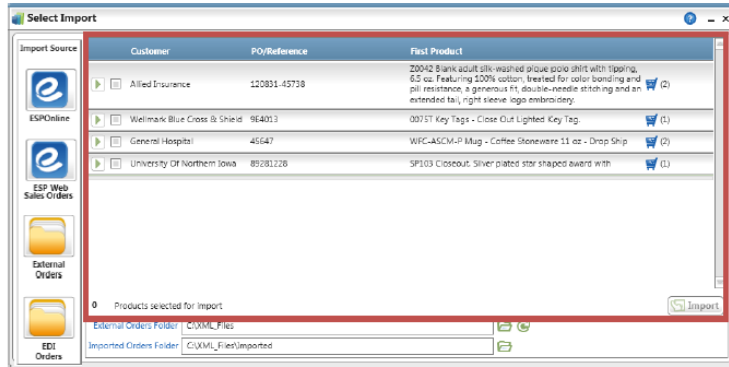


**Selecting to import—** Select an XML file to be imported by either checking

☑ 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.


**Adding products to an existing order using the External Order Import**
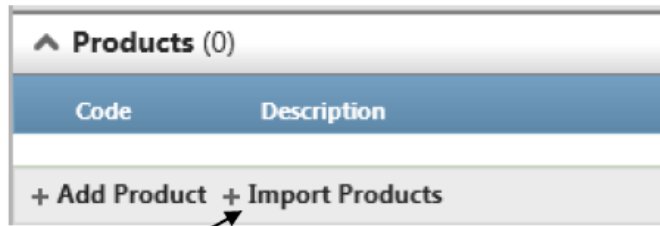
While in an order, select the Import Products from the footer of the product section.

Select External Orders in the window that opens from selecting import.
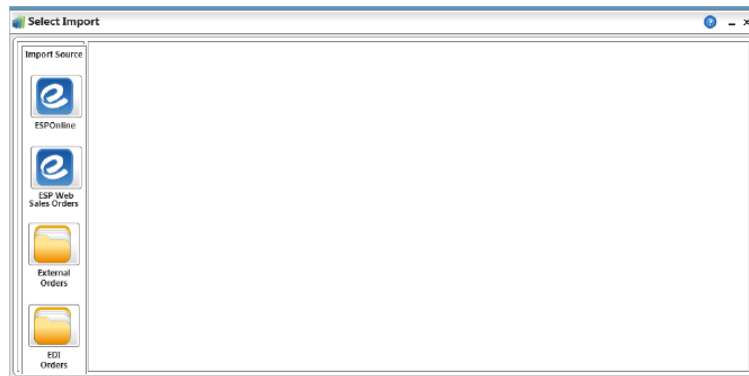


The XML files located in your External Order Folder will appear in the import display.

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.



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.
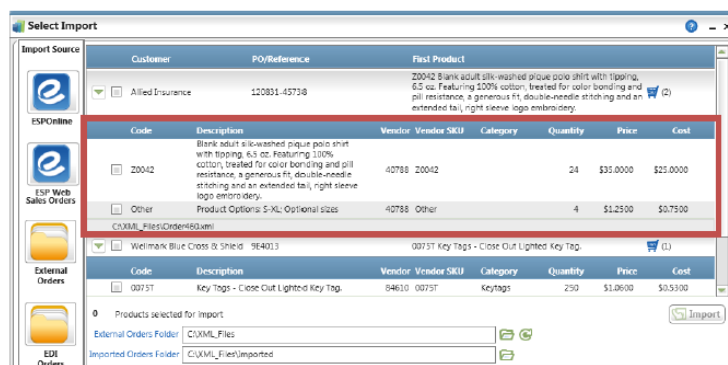


**Selecting to import—** Select products to be imported by either checking the box for an XML file (to select all products) or expanding the XML file

section and checking the box next to the individual 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 products will be imported into the order.