

eCMS User Guide

Importing Order Data

Modification Description

This eCMS modification provides the ability to import Order Processing data (orders) into the eCMS database. This is an alternative way of inputting data into the Order Processing application.

Six order types are supported for import:

Type 1. Customer Order – The order (transaction) is charged to a customer.

Type 2. Job Order – The order (inventory) is to be charged directly to a job (project) and no income is reported.

Type 3. Customer/Job Order – The order is charged to a job (project) and the job is billed (invoiced) for the inventory used.

Type 4. Department Order – The order is charged to a department and no income is reported.

Type 5. Equipment Order – The order is charged to a piece of equipment and no income is reported.

Type 9. Job @ Price Order – The order (inventory) is to be charged directly to a job (project) at the selling price instead of at cost.

The Order Data Import process has five steps:

1. Create an import template.
2. Download the template as a spreadsheet.
3. Enter order data into the spreadsheet and save it.
4. Import order data spreadsheet into eCMS files and resolve errors, if any.
5. Process the orders as normal in eCMS.

Modification System Requirements

Requires eCMS v.4.1 Service Pack 2 Fix Pack 7 or later.

CSP Reference: 1801851 – ISP 180030

eCMS User Guide

Importing Order Data

Table of Contents

Modification Description	1
Modification System Requirements	2
Modification Implementation.....	4
Create an Import Template	4
Template Name Entry	5
Import Field Selection	6
Download Template as a Spreadsheet	9
Common Template Fields	10
Enter Order Data into the Spreadsheet.....	12
Order Type 1: Customer Order	13
Order Type 2: Job Order.	14
Order Type 3: Customer/Job Order	15
Order type 4: Department Order.....	17
Order Type 5: Equipment Order	18
Order Type 9: Job @ Price Order	19
Import Order Data Spreadsheet	20
Select the Spreadsheet File to Import	21
Import the Order Data	22
Resolve Import Errors	25
Process the Orders as Normal in eCMS	33

Modification Implementation

Create an Import Template

Menu Path: Admin > Application Installation > Template Setup

The *Import Template Setup* screen allows you to select the fields you want for your template or to create the download spreadsheet to be used to import the data. You must add a template before you can use it for field selection or download.

You can create a single Order Processing Import template with all the columns you need to import any order type you will use. Or, you can create multiple templates, one for each order type or group of order types you will use, which includes only columns specific to those types.

To add new templates or to *Edit* or *Delete* existing templates, click the **Add Template** button to display the *Template Name Entry* screen.



The screenshot shows the 'Import Template Setup' window. At the top, there's a title bar with 'Import Template Maintenance' on the left, 'Import Template Setup' in the center, and 'ITM01' on the right. Below the title bar, there are two buttons: 'Add Template' (highlighted with a blue border) and 'Download'. Below these buttons is a 'Template Name:' label followed by a dropdown menu showing 'Select a Template'. The main area is divided into two sections: 'Table Fields' on the left and 'Template Fields' on the right. Both sections have a table with columns: 'Selected', 'Column', 'Description', 'Type', 'Size', and 'Decimal Digits'. The 'Table Fields' table is currently empty. The 'Template Fields' table is also empty. Between the two tables, there are four buttons: a right-pointing arrow, a left-pointing arrow, an up arrow, and a down arrow. At the bottom right of the window, there is an 'Exit' button.

eCMS User Guide

Importing Order Data

Template Name Entry

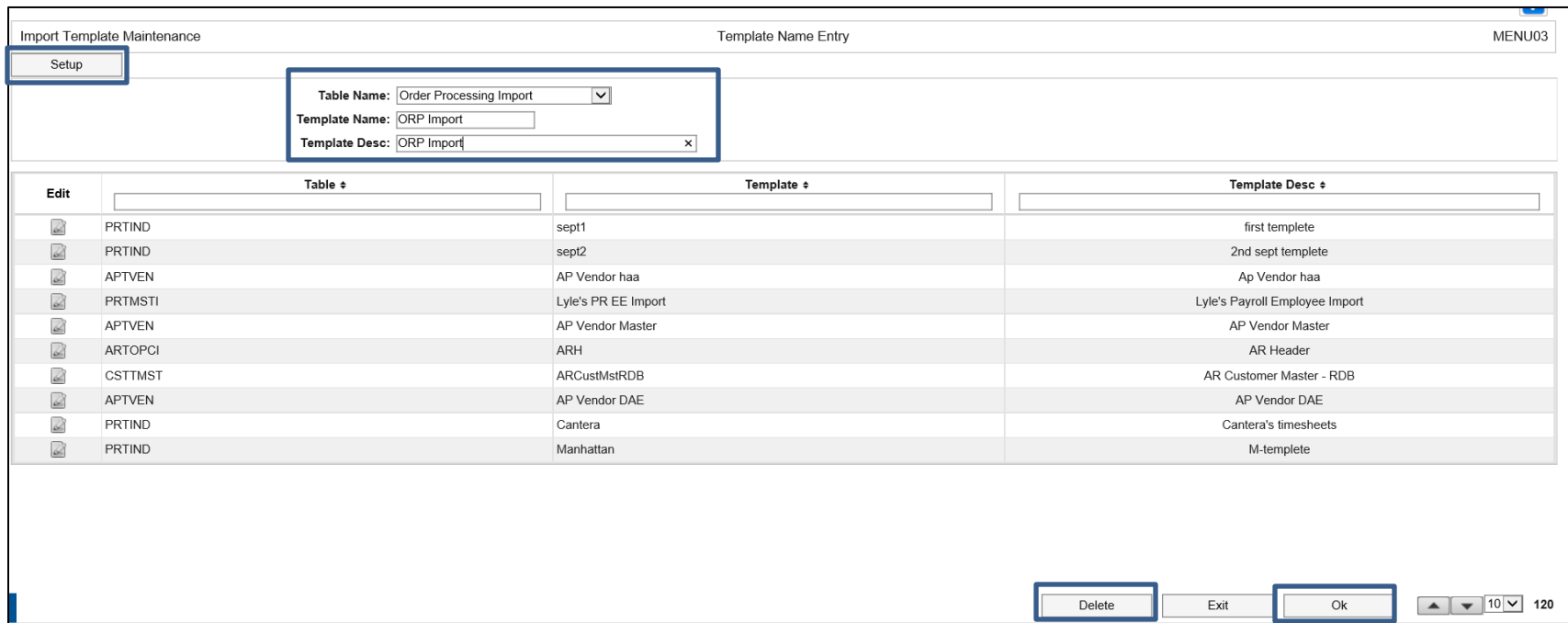
To create a new template, select the *Table Name* from the dropdown and fill in the *Template Name* and *Template Desc*.

To modify these values or to delete an existing template, click on the *Edit* icon for the desired template, then make the changes.

Click **Ok** to add or modify the template. The *Template Name* and *Template Desc* will be blanked after a successful add or change.

If removing a template, click **Delete** to delete the selected template. **Note:** All template fields must be previously removed in order to delete.

Click the **Setup** button to return to the *Import Template Setup* screen.



Import Template Maintenance Template Name Entry MENU03

Setup

Table Name: Order Processing Import ▼

Template Name: ORP Import

Template Desc: ORP Import x

Edit	Table *	Template *	Template Desc *
	PRTIND	sept1	first template
	PRTIND	sept2	2nd sept template
	APTVEN	AP Vendor haa	Ap Vendor haa
	PRTMSTI	Lyle's PR EE Import	Lyle's Payroll Employee Import
	APTVEN	AP Vendor Master	AP Vendor Master
	ARTOPCI	ARH	AR Header
	CSTTMST	ARCustMstRDB	AR Customer Master - RDB
	APTVEN	AP Vendor DAE	AP Vendor DAE
	PRTIND	Cantera	Cantera's timesheets
	PRTIND	Manhattan	M-template

Delete Exit Ok

10 120

Table Name: Select the import table name from the dropdown to add or change. Select *Order Processing Import* for this type of template.

Template Name: Enter or change the name for the template. Make it descriptive so you can find it easily.

Template Desc: Enter or change the description for the template. Provide additional descriptive information about the template.

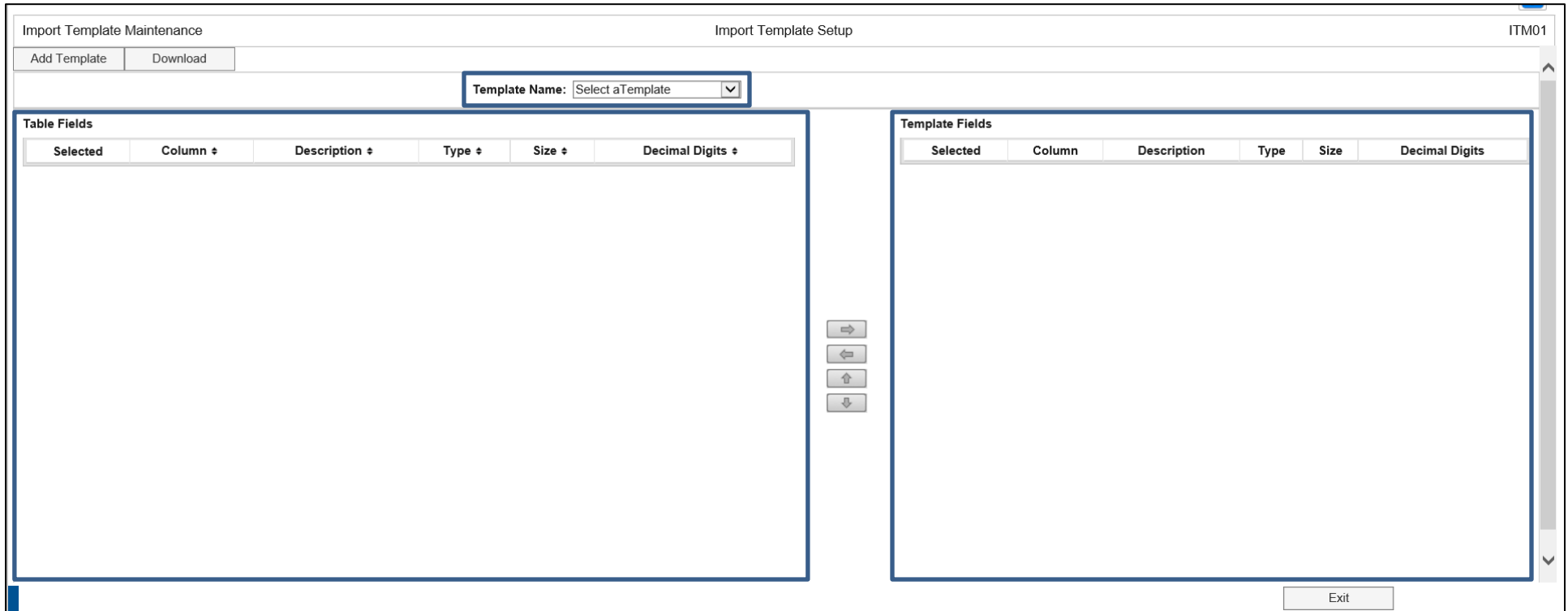
eCMS User Guide

Importing Order Data

Import Field Selection

An import template requires a definition of what fields are to be included for the import.

Select the desired template from the *Template Name* dropdown.



The screenshot shows the 'Import Template Setup' window. At the top, there's a title bar with 'Import Template Maintenance' and 'Import Template Setup'. Below the title bar, there are two buttons: 'Add Template' and 'Download'. A 'Template Name' dropdown menu is highlighted with a red box, showing 'Select a Template'. Below this, there are two tables: 'Table Fields' on the left and 'Template Fields' on the right. Both tables have columns: 'Selected', 'Column', 'Description', 'Type', 'Size', and 'Decimal Digits'. Between the tables are four arrows: a right arrow, a left arrow, an up arrow, and a down arrow. At the bottom right, there is an 'Exit' button.

The Table Fields and Template Fields lists will be populated after the Template Name is selected.

- The *Table Fields* list will contain all the unselected fields available for the *File Name* that was entered for the import template.
- The *Template Fields* list will contain all the fields that have been selected to be in your template.
- Any column name shown **RED** on the *Table Fields* list is required to be selected for the import template. The import process will fail if that field is omitted.

eCMS User Guide

Importing Order Data

To add fields to your import template, check one or more of the *Selected* checkboxes for *Table Fields* columns, then click on the right-pointing arrow button. The selected column(s) from the *Table Fields* list will be moved to the *Template Fields* list.

To remove fields from your import template, check one or more of the *Selected* checkboxes for *Template Fields* then click on the left-pointing arrow button. The selected *Template Fields* will be moved back to the *Table Fields* list.

To change the sequence the *Template Fields*, check one or more of the *Selected* checkboxes for *Template Fields* then click on the up-pointing or down-pointing arrow buttons. The selected field(s) will be moved up or down on the *Template Fields* list.

Import Template Maintenance

Import Template Setup

ITM01

Add Template

Download

Template Name:

ORP Import

Table Fields

Selected	Column	Description	Type	Size	Decimal Digits
<input type="checkbox"/>	ACCOUNTTYPE	Account Type	CHAR	1	0
<input type="checkbox"/>	AREACODE	Area Code	DECIMAL	3	0
<input type="checkbox"/>	BACKORDERCODE	Back Order Code	CHAR	1	0
<input type="checkbox"/>	BILLINGDATE	Billing Date	DECIMAL	8	0
<input type="checkbox"/>	BILLTOAR	Bill To A/R	CHAR	1	0
<input type="checkbox"/>	BILLTOCUST	Bill To Customer	DECIMAL	5	0
<input type="checkbox"/>	CARTONCHG	Carton Charge	CHAR	1	0
<input type="checkbox"/>	CASHDISC	Cash Discount	DECIMAL	3	1
<input type="checkbox"/>	CBDACCOUNT	C.B.D. Account	CHAR	1	0
<input type="checkbox"/>	CITYTAXPCT	City Tax %	DECIMAL	7	4
<input type="checkbox"/>	CNTYTAXPCT	County Tax %	DECIMAL	7	4
<input type="checkbox"/>	CODACCOUNT	C.O.D. Account	CHAR	1	0
<input type="checkbox"/>	COMMITTEDITEM	Committed Item	CHAR	1	0
<input type="checkbox"/>	COMMPCT	Commission Percent	DECIMAL	5	2
<input type="checkbox"/>	COMPANYNUMBER	Src Com	DECIMAL	2	0
<input type="checkbox"/>	COMPONENTNO03	Component No	CHAR	3	0
<input type="checkbox"/>	CONVERSIONFACTOR	Conversion Factor	DECIMAL	7	2
<input type="checkbox"/>	COSTTYPE	Cost Type	CHAR	1	0
<input type="checkbox"/>	COSTVARIANCE	Cost Variance	DECIMAL	9	3

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Template Fields

Selected	Column	Description	Type	Size	Decimal Digits
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Exit

See the field names and descriptions in the [Common Template Fields](#) section of this document for details.

eCMS User Guide

Importing Order Data

Here is an example of a *Template Field* list that has been selected and sequenced:

Template Fields					
Selected	Column	Description	Type	Size	Decimal Digits
<input type="checkbox"/>	COMPANYNUMBER	Src Com	DECIMAL	2	0
<input type="checkbox"/>	DIVISIONNUMBER	Src Div	DECIMAL	3	0
<input type="checkbox"/>	ORDERNUMBER	Order No	DECIMAL	6	0
<input type="checkbox"/>	RECORDCODE	1=Cst	CHAR	1	0
<input type="checkbox"/>	CUSTOMERNUMBER	Customer No	DECIMAL	5	0
<input type="checkbox"/>	JOBNUMBER	Job No	CHAR	6	0
<input type="checkbox"/>	SUBJOBNUMBER	Sub Job	CHAR	3	0
<input type="checkbox"/>	MORLN	Order Line No	DECIMAL	3	0
<input type="checkbox"/>	DISTCOMPANY	Dst Com	DECIMAL	2	0
<input type="checkbox"/>	DISTDIVISION	Dst Div	DECIMAL	3	0
<input type="checkbox"/>	INVENTORYITEM	Inventory Item	CHAR	1	0
<input type="checkbox"/>	PARTNUMBER	Part No	CHAR	15	0
<input type="checkbox"/>	WHSED	Warehouse	CHAR	5	0
<input type="checkbox"/>	DESC30A	Description	CHAR	30	0
<input type="checkbox"/>	QTYORDERED	Quantity Ordered	DECIMAL	9	2
<input type="checkbox"/>	QTYSHIPPED	Quantity Shipped	DECIMAL	9	2
<input type="checkbox"/>	MUM	U/M	CHAR	2	0
<input type="checkbox"/>	MUNCS	Unit Cost-Cost	DECIMAL	9	3
<input type="checkbox"/>	JCDISTRIBUTUION	J/C Dist No	CHAR	15	0
<input type="checkbox"/>	COSTTYPE	Cost Type	CHAR	1	0
<input type="checkbox"/>	UNITPRICE	Unit Price	DECIMAL	9	3
<input type="checkbox"/>	GLDEBITACCTNO	G/L Debit Acct	DECIMAL	15	0
<input type="checkbox"/>	CREDITACCTNO	G/L Credit Acct	DECIMAL	15	0
<input type="checkbox"/>	EQUIPMENTNUMBER	Equipment No	CHAR	10	0
<input type="checkbox"/>	WORKORDERNO	W/O No	DECIMAL	6	0
<input type="checkbox"/>	WRKORDLN	W/O Line No	DECIMAL	3	0
<input type="checkbox"/>	COMPONENTNO03	Component No	CHAR	3	0
<input type="checkbox"/>	TYPEOFCOST	Type Of Cost	CHAR	1	0

eCMS User Guide

Importing Order Data

Download Template as a Spreadsheet

When you are satisfied with your *Template Fields* selection list you are ready to start using the template. To create an excel spreadsheet for the template, click the **Download** button.

Import Template Maintenance Import Template Setup ITM01

Add Template **Download**

Template Name: ORP Import

Selected	Column	Description	Type	Size	Decimal Digits
<input type="checkbox"/>	ACCOUNTTYPE	Account Type	CHAR	1	0
<input type="checkbox"/>	AREACODE	Area Code	DECIMAL	3	0
<input type="checkbox"/>	BACKORDERCODE	Back Order Code	CHAR	1	0
<input type="checkbox"/>	BILLINGDATE	Billing Date	DECIMAL	8	0
<input type="checkbox"/>	BILLTOAR	Bill To A/R	CHAR	1	0
<input type="checkbox"/>	BILLTOCUST	Bill To Customer	DECIMAL	5	0
<input type="checkbox"/>	CARTONCHG	Carton Charge	CHAR	1	0
<input type="checkbox"/>	CASHDISC	Cash Discount	DECIMAL	3	1
<input type="checkbox"/>	CBDACCOUNT	C.B.D. Account	CHAR	1	0
<input type="checkbox"/>	CITYTAXPCT	City Tax %	DECIMAL	7	4
<input type="checkbox"/>	CNTYTAXPCT	County Tax %	DECIMAL	7	4
<input type="checkbox"/>	CODACCOUNT	C.O.D. Account	CHAR	1	0
<input type="checkbox"/>	COMMITTEDITEM	Committed Item	CHAR	1	0
<input type="checkbox"/>	COMMPCT	Commission Percent	DECIMAL	5	2
<input type="checkbox"/>	CONVERSIONFACTOR	Conversion Factor	DECIMAL	7	2
<input type="checkbox"/>	COSTVARIANCE	Cost Variance	DECIMAL	9	3
<input type="checkbox"/>	CREDITHOLD	Credit Hold	CHAR	1	0
<input type="checkbox"/>	CREDITMEMOCODE	Credit Code	CHAR	1	0
<input type="checkbox"/>	CURRCNVAMT	Curr Conv Amt	DECIMAL	13	2
<input type="checkbox"/>	CURRCNVFCT	Curr Conv Factor	DECIMAL	19	9

Template Fields	Src Div	DECIMAL	3	0
<input type="checkbox"/>	DIVISIONNUMBER	DECIMAL	3	0
<input type="checkbox"/>	ORDERNUMBER	DECIMAL	6	0
<input type="checkbox"/>	RECORDCODE	CHAR	1	0
<input type="checkbox"/>	CUSTOMERNUMBER	DECIMAL	5	0
<input type="checkbox"/>	JOBNUMBER	CHAR	6	0
<input type="checkbox"/>	SUBJOBNUMBER	CHAR	3	0
<input type="checkbox"/>	MORLN	DECIMAL	3	0
<input type="checkbox"/>	DISTCOMPANY	DECIMAL	2	0
<input type="checkbox"/>	DISTDIVISION	DECIMAL	3	0
<input type="checkbox"/>	INVENTORYITEM	CHAR	1	0
<input type="checkbox"/>	PARTNUMBER	CHAR	15	0
<input type="checkbox"/>	WHSED	CHAR	5	0
<input type="checkbox"/>	DESC30A	CHAR	30	0
<input type="checkbox"/>	QTYORDERED	DECIMAL	9	2
<input type="checkbox"/>	QTYSHIPPED	DECIMAL	9	2
<input type="checkbox"/>	MUM	CHAR	2	0
<input type="checkbox"/>	MUNCS	DECIMAL	9	3
<input type="checkbox"/>	JCDISTRIBUTION	CHAR	15	0
<input type="checkbox"/>	COSTTYPE	CHAR	1	0
<input type="checkbox"/>	UNITPRICE	DECIMAL	9	3
<input type="checkbox"/>	GLDEBITACCTNO	DECIMAL	15	0

When the downloaded spreadsheet file is opened, the import spreadsheet may display in protected view:

PROTECTED VIEW Be careful—files from the Internet can contain viruses. Unless you need to edit, it's safer to stay in Protected View. **Enable Editing**

A1	Src Com	Src Div	Order No	1=Cst	Customer No	Job No	Sub Job	Order Line No	Dst Com	Dst Div	Inventory Item	Part No	Warehouse	Description	Quantity Ordered	Quantity Shipped	U/M	Unit Cost-Cost	J/C Dist No	Cc
1	Src Com	Src Div	Order No	1=Cst	Customer No	Job No	Sub Job	Order Line No	Dst Com	Dst Div	Inventory Item	Part No	Warehouse	Description	Quantity Ordered	Quantity Shipped	U/M	Unit Cost-Cost	J/C Dist No	Cc
2																				

When ready to enter data, click on the “Enable Editing” button at top of spreadsheet (if protected) and begin entering information. Multiple order types can be entered on the same spreadsheet as long as the template has all the fields required by the order types entered.

After entering the order data, save the spreadsheet to a folder accessible to the eCMS database server for imports.

eCMS User Guide

Importing Order Data

Common Template Fields

The spreadsheet column heading and matching field names for fields commonly used in Order Processing templates are explained in this section. If the field name is **RED**, it must be included on any and all order processing templates. Other fields may be required, depending on the order type, but can be left off the template if you don't do those order types.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1	Src Com	Src Div	Order No	1=Cst	Customer No	Job No	Sub Job	Order Line No	Dst Com	Dst Div	Inventory Item	Part No	Warehouse	Description
2	3	23	5388	1	612			1			Y	DRAG PART 2		
3														
4														

- A. **Src Com** – **COMPANYNUMBER**: Used in combination with Src Div.
- B. **Src Div** – **DIVISIONNUMBER**: Both Company and Division numbers are required on every line that requires an order number.
- C. **Order No** – **ORDERNUMBER**: The order number is required on the first line of each order to indicate the start of an order. It does not need to be filled in again for additional lines until a different order is being entered.
 - a. Order Number can be any six-digit number, 1 to 999,999.
 - b. Company, Division, Order Number and Order Line Number must be unique in the import file.
- D. **1=Cst** – **RECORDCODE**: Order Type. Value required on every line of an order. Valid Order Types: 1=Customer; 2=Job; 3=Customer/Job; 4=Department; 5=Equipment; 9=Job Order @ Price.
- E. **Customer No** – **CUSTOMERNUMBER**: A value is required for order types 1, 4 or 5. For order types 2, 3 or 9, the value is pulled from the Job Description file when a value is not provided.
- F. **Job No** – **JOBNUMBER**: A value is required only when importing an order for a job. If used, it must be on every line and the same for every line on the order.
- G. **Sub Job** – **SUBJOBNUMBER**: The sub job column is needed only if you use non-blank sub jobs on your orders.
- H. **Order Line No** – **MORLN**: The 3-digit order line number is required for every line of an order and must be unique for the order.
- I. **Dst Com** – **DISTCOMPANY**: Distribution Company. Used in combination with Dst Div.
- J. **Dst Div** – **DISTDIVISION**: Distribution Division. The distribution company and division values are needed only if different than the source company and division. If you don't use cross-company costing, you can omit these columns from the template.
- K. **Inventory Item** – **INVENTORYITEM**: Is the Part Number an inventory item? Y = Yes or N = No. Value on every line must be Y or N.
- L. **Part No** – **PARTNUMBER**: Part Number of the item being ordered is required when an inventory item is ordered.
- M. **Warehouse** – **WHSED**: The warehouse number is needed only if the part is coming from a specific warehouse.
- N. **Description** – **DESC30A**: A description of the part is required if the Inventory item is "N" (not an inventory item).

eCMS User Guide

Importing Order Data

	O	P	Q	R	S	T	U	V	W	X	Y	Z	AA	AB
1	Quantity Ordered	Quantity Shipped	U/M	Unit Cost-Cost	J/C Dist No	Cost Type	Unit Price	G/L Debit Acct	G/L Credit Acct	Equipment No	W/O No	W/O Line No	Component No	Type Of Cost
2	1		1 EA											
3														
4														

- O. Quantity Ordered – QTYORDERED:** Quantity that was ordered.
- P. Quantity Shipped – QTYSHIPPED:** Quantity that was shipped.
- Q. U/M – MUM:** Unit of measure.
- R. Unit Cost-Cost – MUNCS:** The unit cost of the item ordered.
 - a. If the item is not an inventory item, a unit cost value must be entered.
 - b. If the item is an inventory item, the unit cost amount will be pulled from the inventory Item Master when the value is blank or zero. Any value entered will override the amount.
- S. J/C Dist No – JCDISTRIBUTION:** When a job number is entered, the job cost distribution number is required to categorize the amount.
- T. Cost Type – COSTTYPE:** The cost type associated with the job cost distribution amount.
- U. Unit Price – UNITPRICE:** Used only for Type 9, Job Order @ Price, orders. The amount will pull from the item master. Any value entered will override that amount.

- V. G/L Debit Acct – GLDEBITACCTNO:** When the G/L account number to be debited is not entered, the account number to use will be based on the order type and hierarchy. Any value entered will not be overridden.
- W. G/L Credit Acct – CREDITACCTNO:** When the G/L account number to be credited is not entered, the account number to use will be based on the order type and hierarchy. Any value entered will not be overridden.
- X. Equipment No – EQUIPMENTNUMBERD:** the number associated with the piece of equipment.
- Y. W/O No – WORKORDERNO:** The associated equipment work order number.
- Z. W/O Line No – WRKORDLN:** The line number on the work order.
- AA. Component No – COMPONENTNO03:** The equipment component number.
- AB. Type of Cost – TYPEOFCOST:** The type of cost for the equipment transaction.

eCMS User Guide

Importing Order Data

Enter Order Data into the Spreadsheet

Some things to remember about the Template Spreadsheet:

- A template spreadsheet is downloaded and saved into a PC or server folder for importing.
 - In order to import the data, the folder must be on a PC drive or a network mapped drive.
- Using eCMS Import Template download to create a new spreadsheet is not required for each import.
 - The eCMS template download is needed only if the Import Template definition is changed.
 - The prior spreadsheet can be reused by replacing the data in the spreadsheet with data for the next import.
 - The Import Template download is a convenience. A downloaded spreadsheet template is not required at all, with or without column headings. However, the number of columns and type of data in the spreadsheet must match the Import Template definition.

Some things to remember while entering data into the spreadsheet:

- An order number is only required on the first line of an order.
- Whenever an order number is entered on the spreadsheet, the source company and division must also be entered.
- The Order Type must be entered and must be the same for every line of an order.
- The combination of Source Company and Division, Order Number and Order Line Number must be unique in the import spreadsheet.

Some things to remember about importing the spreadsheet:

- After entering the data, the spreadsheet must be saved before importing the data.
- Imported data without errors for each order are automatically transferred into the eCMS order processing files. Only when there are errors will the data be left in the eCMS import files.
 - If a duplicate order is found, it will be renumbered in the edit program.
 - Corrections to imported data are made using eCMS Import menu options. See the [Resolving Import Errors](#) section for details.
- Accounts Receivable tax codes are applied when the order is processed except for Type 4 Department orders, which are not taxed. See the Appendix: Tax Setup Information for details.

Following are examples of entering order data into a spreadsheet for each order type.

eCMS User Guide

Importing Order Data

Order Type 1: Customer Order

This type of order is charged to a specific customer. It is not related to a job or project.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1	Src Com	Src Div	Order No	1=Cst	Customer No	Job No	Sub Job	Order Line No	Dst Com	Dst Div	Inventory Item	Part No	Warehouse	Description
2	3	23	5388	1	612			1			Y	DRAG PART 2		
3														
4														

	O	P	Q	R	S	T	U	V	W	X	Y	Z	AA	AB
1	Quantity Ordered	Quantity Shipped	U/M	Unit Cost-Cost	J/C Dist No	Cost Type	Unit Price	G/L Debit Acct	G/L Credit Acct	Equipment No	W/O No	W/O Line No	Component No	Type Of Cost
2	1	1	EA											
3														
4														

See the field names and descriptions in the [Common Template Fields](#) section of this document for details.

D. 1=Cst – Order type is always 1.

E. Customer No – Customer number is required on every line.

F. Job No and **G. Sub Job** – The job and sub job numbers (project) are ignored and values should not be entered.

S. J/C Dist No and **T. Cost Type** – The job cost distribution values are ignored and values should not be entered.

X thru AB. – Equipment specific columns are ignored and values should not be entered.

Other template column requirements are described in the [Common Template Fields](#) section.

eCMS User Guide

Importing Order Data

Order Type 2: Job Order.

This type of order is charged directly to a specific job or project. No income is reported.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1	Src Com	Src Div	Order No	1=Cst	Customer No	Job No	Sub Job	Order Line No	Dst Com	Dst Div	Inventory Item	Part No	Warehouse	Description
2	3	23	8912	2	612	72418		1			Y	BELT		
3				2		72418		2			N	MISC PART		MISC EXTRA PART
4				2		72418		3			Y	AC11	32	
5														
6														

	O	P	Q	R	S	T	U	V	W	X	Y	Z	AA	AB
1	Quantity Ordered	Quantity Shipped	U/M	Unit Cost-Cost	J/C Dist No	Cost Type	Unit Price	G/L Debit Acct	G/L Credit Acct	Equipment No	W/O No	W/O Line No	Component No	Type Of Cost
2	1	1	EA		100	M								
3	1	1	EA	11.95	100	M								
4	1	1	EA		100	M								

See the field names and descriptions in the [Common Template Fields](#) section of this document for details.

D. 1=Cst – Order type is always 2.

E. Customer No – Customer number is optional. If blank or zero, the value will be pulled from the Job Description when imported.

F. Job No – The job number value is required.

G. Sub Job –The sub job value is required when the sub job is non-blank.

S. J/C Dist No and **T. Cost Type** – The job cost distribution and cost type values are required.

X thru AB. – Equipment specific columns are ignored and values should not be entered.

Other template column requirements are described in the [Common Template Fields](#) section.

eCMS User Guide

Importing Order Data

Order Type 3: Customer/Job Order

This type of order is charged to a specific job or project and the job is billed (invoiced) for the inventory used. The job must have been set up for *Customer/Job Order* type of billing. This selection will be used by Order Processing to simultaneously charge a job and bill the customer.

The billing type is defined in Job Cost Setup. To review or setup the job billing information use the eCMS Job Cost Setup menu option.

Menu: J/C > Maintenance > Job Cost Setup

After entering the job or selecting it from the dropdown, press Enter or click the *Job Description* button. Then click on the *General Billing* tab. Refer to the appropriate eCMS documentation to determine the job setup requirements related to this billing type.

Job Cost		Job Description Maintenance		Mode: Update		XJC11604		JCPM04 - 1	
Job Number: 730		Sub Job Number:		Description 1:		New Herb House			
General 1	General 2	General - Billing	Lien Waiver	Equipment	General Ledger	Collaborator			
Billing Type:		Job/Customer Order							
Pay When Paid Halt Code:		0							
Income Distribution:		100.000000							
Income Type:		1							
Contract Number:		0							
Auto-create Income Dist:		<input type="checkbox"/>							
		<div> <div>Contact</div> <div> Name: </div> <div> Phone Number: </div> <div> Post Burden to T & M: </div> <div> Change Default Equip Dept: </div> </div>							

eCMS User Guide

Importing Order Data

The job for this example has the *Billing Type* set to **Job/Customer Order**.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
1	Src Com	Src Div	Order No	1=Cst	Customer No	Job No	Sub Job	Order Line No	Dst Com	Dst Div	Inventory Item	Part No	Warehouse	Description	Quantity Ordered
2	3	23	5388	3	612	730		1			Y	DRAG PART 2			1
3															
4															

	P	Q	R	S	T	U	V	W	X	Y	Z	AA	AB	AC
1	Quantity Shipped	U/M	Unit Cost-Cost	J/C Dist No	Cost Type	Unit Price	G/L Debit Acct	G/L Credit Acct	Equipment No	W/O No	W/O Line No	Component No	Type Of Cost	Print Code
2		1 EA		100 M										
3														
4														

See the field names and descriptions in the [Common Template Fields](#) section of this document for details.

D. 1=Cst – Order type is always 3.

E. Customer No – Customer number is optional. If blank or zero, the value will be pulled from the Job Description when imported.

F. Job No – The job number value is required.

G. Sub Job –The sub job value is required when the sub job is non-blank.

S. J/C Dist No and **T. Cost Type** – The job cost distribution and cost type values are required.

X thru AB. – Equipment specific columns are ignored and values should not be entered.

Other template column requirements are described in the [Common Template Fields](#) section.

eCMS User Guide

Importing Order Data

Order type 4: Department Order

This type of order is charged to a department and no income is reported. The department is determined by the customer master setup.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
1	Src Com	Src Div	Order No	1=Cst	Customer No	Job No	Sub Job	Order Line No	Dst Com	Dst Div	Inventory Item	Part No	Warehouse	Description	Quantity Ordered
2	3	23	5390	4	612			1			Y	DRAG PART 3			1
3															

	P	Q	R	S	T	U	V	W	X	Y	Z	AA	AB
1	Quantity Shipped	U/M	Unit Cost-Cost	J/C Dist No	Cost Type	Unit Price	G/L Debit Acct	G/L Credit Acct	Equipment No	W/O No	W/O Line No	Component No	Type Of Cost
2		1 EA					1.11E+13						
3													
4													

See the field names and descriptions in the [Common Template Fields](#) section of this document for details.

D. 1=Cst – Order type is always 4.

E. Customer No – Customer number is required on every line. This determines the department.

F. Job No and **G. Sub Job** – The job and sub job numbers (project) are ignored and values should not be entered.

S. J/C Dist No and **T. Cost Type** – The job cost distribution values are ignored and values should not be entered.

X thru AB. – Equipment specific columns are ignored and values should not be entered.

Other template column requirements are described in the [Common Template Fields](#) section.

eCMS User Guide

Importing Order Data

Order Type 5: Equipment Order

This type of order is charged to a piece of equipment and no income is reported.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1	Src Com	Src Div	Order No	1=Cst	Customer No	Job No	Sub Job	Order Line No	Dst Com	Dst Div	Inventory Item	Part No	Warehouse	Description
2	3	23	8912	5	612	72418		1			Y	BELT		
3				5		72418		2			N	MISC PART		MISC EXTRA PART
4				5		72418		3			Y	AC11	32	
5														

	O	P	Q	R	S	T	U	V	W	X	Y	Z	AA	AB
1	Quantity Ordered	Quantity Shipped	U/M	Unit Cost-Cost	J/C Dist No	Cost Type	Unit Price	G/L Debit Acct	G/L Credit Acct	Equipment No	W/O No	W/O Line No	Component No	Type Of Cost
2	1		1 EA		100 M			6.08E+13		BACKHOE	998148	1 OIL		5
3	1		1 EA	11.95	100 M			6.08E+13		BACKHOE	998148	1 OIL		5
4	1		1 EA		100 M			6.08E+13		BACKHOE	998148	1 OIL		5
5														
6														

See the field names and descriptions in the [Common Template Fields](#) section of this document for details.

D. 1=Cst – Order type is always 5.

E. Customer No – Customer number is required except when the Job No is entered. It then defaults to the job customer.

F. Job No and **G. Sub Job** – The job and sub job numbers (project) is not required, but can be entered for equipment orders.

S. J/C Dist No and **T. Cost Type** – The job cost distribution values are ignored and values should not be entered.

V. G/L Debit Acct: When charged to a job, the G/L debit account must be a code 8 account. Otherwise, a code 6 account.

X. Equipment No – The equipment number is required.

Y. W/O No and **Z. W/O Line No** – The associated work order number and line number is required.

AA. Component No – The equipment component number.

AB. Type of Cost – The type of cost for the equipment

Other template column requirements are described in the [Common Template Fields](#) section.

eCMS User Guide

Importing Order Data

Order Type 9: Job @ Price Order

This type of order is charged directly to a specific job or project, the same as Order Type 2, except that only Inventory items are allowed and the amount for the ordered items will be charged at the selling price rather than at cost.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
1	Src Com	Src Div	Order No	1=Cst	Customer No	Job No	Sub Job	Order Line No	Dst Com	Dst Div	Inventory Item	Part No	Warehouse	Description	Quantity Ordered
2	3	23	5391	9	612	72418		1			Y	DRAG PART 4			1
3															
4															
5															

	P	Q	R	S	T	U	V	W	X	Y	Z	AA	AB	AC
1	Quantity Shipped	U/M	Unit Cost-Cost	J/C Dist No	Cost Type	Unit Price	G/L Debit Acct	G/L Credit Acct	Equipment No	W/O No	W/O Line No	Component No	Type Of Cost	Print Code
2		1 EA		100	M									
3														
4														
5														
6														

See the field names and descriptions in the [Common Template Fields](#) section of this document for details.

D. 1=Cst – Order type is always 9.

E. Customer No – Customer number is optional. If blank or zero, the value will be pulled from the Job Description when imported.

F. Job No – The job number value is required.

G. Sub Job – The sub job value is required when the sub job is non-blank.

K. Inventory Item – Required as Y. Only inventory items can be on this type of order.

L. Part No – The inventory part number is required.

U. Unit Price – When left blank or zero, the unit selling price will be pulled from the Item Master. Any value entered will override that amount.

S. J/C Dist No and **T. Cost Type** – The job cost distribution and cost type values are required.

X thru AB. – Equipment specific columns are ignored and values should not be entered.

Other template column requirements are described in the [Common Template Fields](#) section.

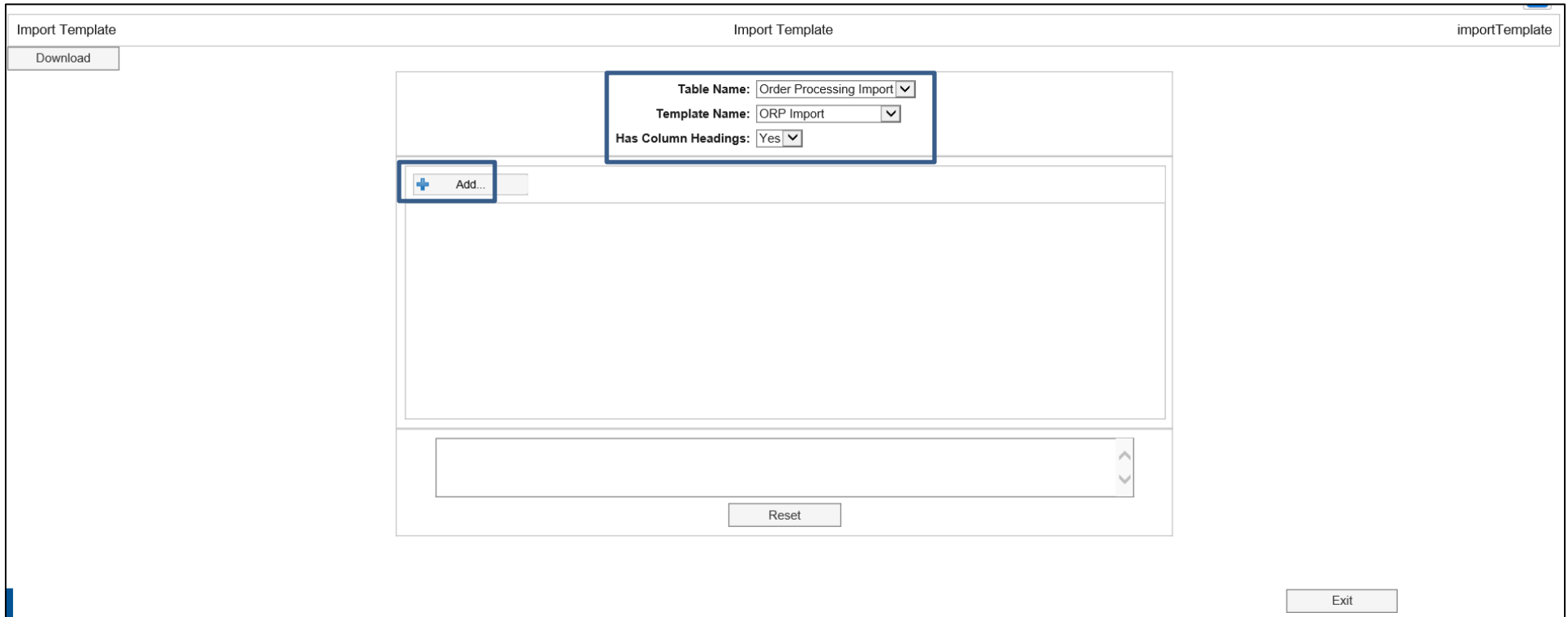
eCMS User Guide

Importing Order Data

Import Order Data Spreadsheet

Menu: Imports > Order Processing > Order Import – Template

The Import Template screen allows selection of the template to be imported and the spreadsheet to import.



The screenshot shows the 'Import Template' window. At the top left is a 'Download' button. The main area contains a form with three dropdown menus: 'Table Name' (set to 'Order Processing Import'), 'Template Name' (set to 'ORP Import'), and 'Has Column Headings' (set to 'Yes'). Below these is a large empty box with an 'Add...' button (indicated by a blue box in the image) and a 'Reset' button at the bottom. An 'Exit' button is located at the bottom right of the window.

- **Table Name:** Click the dropdown to select the Order Processing Import table.
- **Template Name:** Click the dropdown to select the desired template from the list of Order Processing Import templates created.
- **Has Column Headings:** Column headings in the Import Template spreadsheet are optional. If the spreadsheet you will import has headings, select **Yes**, which will cause the first row to be ignored. If there is no heading row, only data, select **No**.

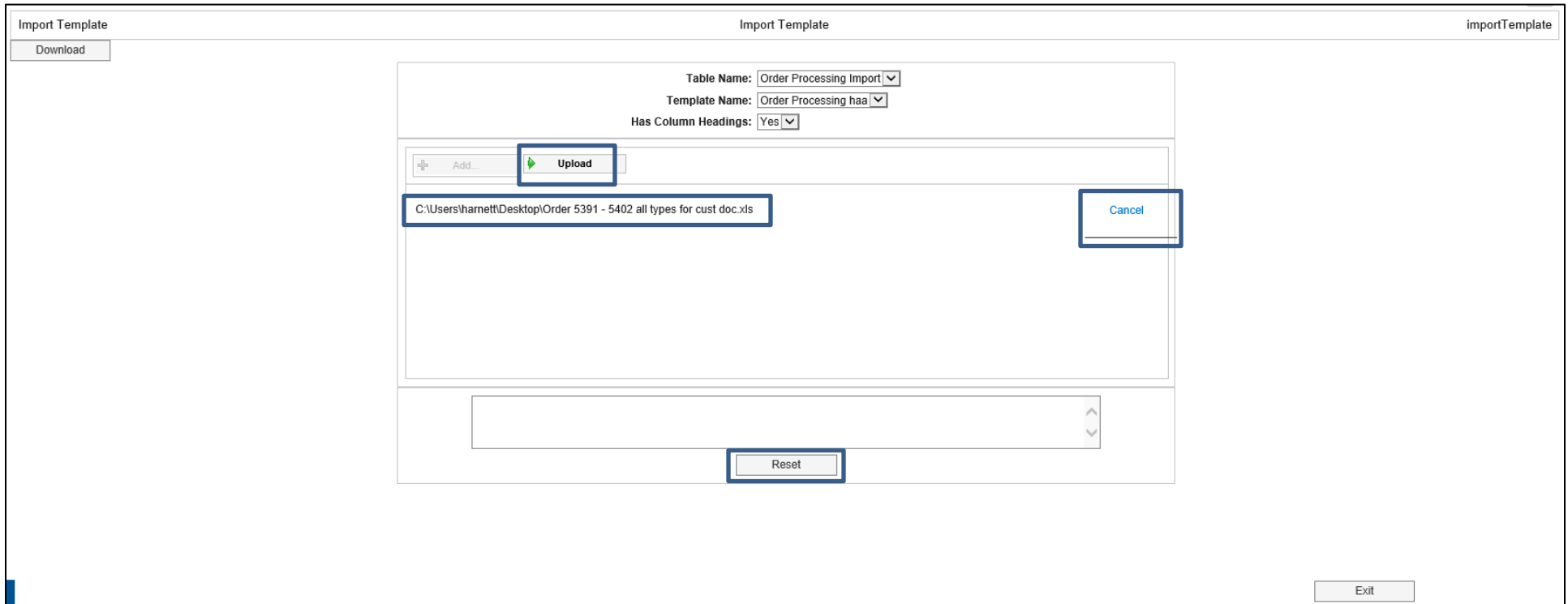
After selecting the Template Name and options, click the **Add** button to select the spreadsheet to be imported.

eCMS User Guide

Importing Order Data

Select the Spreadsheet File to Import

In the popup window, navigate to the folder where you saved the Import Template spreadsheet and select the spreadsheet to be imported.

A screenshot of the "Import Template" dialog box. The dialog has a title bar with "Import Template" on the left and "importTemplate" on the right. Inside, there's a "Download" button in the top left. The main area contains three dropdown menus: "Table Name:" with "Order Processing Import" selected, "Template Name:" with "Order Processing haa" selected, and "Has Column Headings:" with "Yes" selected. Below these are two buttons: "Add..." (disabled) and "Upload" (active). A text box below the buttons shows the file path "C:\Users\harnett\Desktop\Order 5391 - 5402 all types for cust doc.xls". To the right of this text box is a "Cancel" button. At the bottom center is a "Reset" button. In the bottom right corner of the dialog is an "Exit" button.

In this example, the folder is **C:\Users\harnett\Desktop** and the spreadsheet file name is **Order 5391 - 5402 all types for cust doc.xls**.

To select a different import spreadsheet, click the **Cancel** or **Reset** button, then start again with the **Add** button.

Once the desired spreadsheet has been added, click on the **Upload** button to import the order data into eCMS.

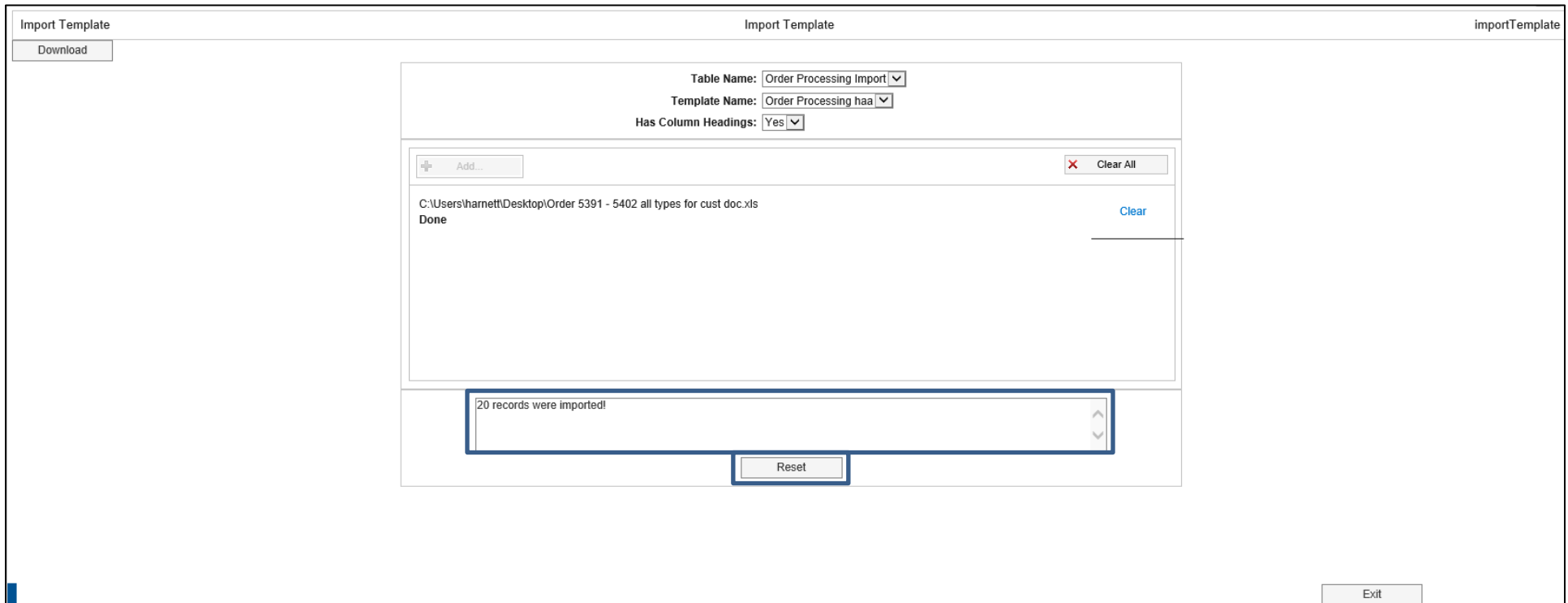
Note: Only one spreadsheet can be selected and processed at a time.

eCMS User Guide

Importing Order Data

Import the Order Data

When the import is successful, a message indicating the number of records imported will be displayed in the message box. If unsuccessful, an error message will indicate the problem. Clicking the **Reset** button will allow selection of another import spreadsheet file to **Add**.



The screenshot shows the 'Import Template' dialog box. It has a title bar with 'Import Template' and a 'Download' button. The main area contains three dropdown menus: 'Table Name' (set to 'Order Processing Import'), 'Template Name' (set to 'Order Processing haa'), and 'Has Column Headings' (set to 'Yes'). Below these is an 'Add...' button with a plus icon and a 'Clear All' button with a red X icon. A text box displays the file path 'C:\Users\harnett\Desktop\Order 5391 - 5402 all types for cust doc.xls' and the word 'Done'. A 'Clear' button is to the right of the text box. At the bottom, a message box says '20 records were imported!' and a 'Reset' button is below it. An 'Exit' button is in the bottom right corner.

In this example, the message *"20 records were imported!"* indicates a successful download. Some examples of error messages are:

Incorrect Template or Spreadsheet

- Please select a table and a template from the list before uploading a file.
- Please select a valid file type.
- # of Columns in Spreadsheet does not match the # of columns in the template!

Incorrect Spreadsheet Data

- Error at A1; Value is larger than template field size. Allowed 2 and actual 7.
- Failed to import records. Msg: [SQL0104] Token , was not valid. ...
- 0 records were imported!

eCMS User Guide

Importing Order Data

Here is a sample of the **Order Import Edit** spool file that is created showing the data that was imported.

03 023 QA Fix41002									
Order Import Edit									
DATE 09/23/2018	Order #	Order Code	ISP348	Cust No/Name	Equip No / Description	Order Date	Ticket No	TIME 13.11	2 PAGE
		Part Number	WH	Description	Eq W/O #/CMP/Line #	Ship Date	Ordered	Adj Type	Tax Codes
		G/L Debit		G/L Credit	Job/Sub Cost Distribution CT			Non Inv	
005391	2-Job	00611	Bluesville Building			09/23/2018		0	
	DRAG PART 10		DRAG PART TEN			09/23/2018	1.00	N	030 051
	0500.00011.000		0149.00000.000		72448 100. M		1.00	N	030 051
	DRAG PART 11		DRAG PART ELEVEN						
	0500.00011.000		0149.00000.000		72448 100. M				
005392	5-Equipment	00611	Bluesville Building			09/23/2018		0	
	DRAG PART 10		DRAG PART TEN		999118 OIL 1	09/23/2018	1.00	N	000 000
	0608.00000.000		0149.00000.000		72448 100. N		1.00	N	000 000
	DRAG PART 11		DRAG PART ELEVEN		999118 OIL 1				
	0608.00000.000		0149.00000.000		72448 100. N				
005393	2-Job	00611	Bluesville Building			09/23/2018		0	
	DRAG PART 10		DRAG PART TEN			09/23/2018	1.00	N	030 001
	0500.00011.000		0149.00000.000		72418 100. M		1.00	N	030 001
	DRAG PART 11		DRAG PART ELEVEN						
	0500.00011.000		0149.00000.000		72418 100. M				
005394	5-Equipment	00611	Bluesville Building			09/23/2018		0	
	DRAG PART 10		DRAG PART TEN		998148 OIL 1	09/23/2018	1.00	N	000 000
	0608.00000.000		0149.00000.000		72418 100. N		1.00	N	000 000
	DRAG PART 11		DRAG PART ELEVEN		998148 OIL 1				
	0608.00000.000		0149.00000.000		72418 100. N				
005395	2-Job	00612	Bluesville Construction			09/23/2018		0	
	DRAG PART 10		DRAG PART TEN			09/23/2018	1.00	N	030 051
	0500.00011.000		0149.00000.000		72448 100. M		1.00	N	030 051
	DRAG PART 11		DRAG PART ELEVEN						
	0500.00011.000		0149.00000.000		72448 100. M				
005396	5-Equipment	00612	Bluesville Construction			09/23/2018		0	
	DRAG PART 10		DRAG PART TEN		999118 OIL 1	09/23/2018	1.00	N	030 013
	0608.00000.000		0149.00000.000		72448 100. N		1.00	N	030 013
	DRAG PART 11		DRAG PART ELEVEN		999118 OIL 1				
	0608.00000.000		0149.00000.000		72448 100. N				
005397	2-Job	00612	Bluesville Construction			09/23/2018		0	
	DRAG PART 10		DRAG PART TEN			09/23/2018	1.00	N	030 001
	0500.00011.000		0149.00000.000		72418 100. M		1.00	N	030 001
	DRAG PART 11		DRAG PART ELEVEN						
	0500.00011.000		0149.00000.000		72418 100. M				
005398	5-Equipment	00612	Bluesville Construction			09/23/2018		0	
	DRAG PART 10		DRAG PART TEN		998148 OIL 1	09/23/2018	1.00	N	030 013
	0608.00000.000		0149.00000.000		72418 100. M		1.00	N	030 013
	DRAG PART 11		DRAG PART ELEVEN		998148 OIL 1				
	0608.00000.000		0149.00000.000		72418 100. M				
005399	1-Customer	00612	Bluesville Construction			09/23/2018		0	
	DRAG PART 2		PART 2 FOR DRAGADOS TEST			09/23/2018	1.00	N	030 013
	0110.00000.000		0149.00000.000						
005400	3-Cust/Job	00612	Bluesville Construction			09/23/2018		0	
	DRAG PART 2		PART 2 FOR DRAGADOS TEST			09/23/2018	1.00	N	030 013
	0500.00011.000		0149.00000.000		730 100. M				
005401	4-Department	00612	Bluesville Construction			09/23/2018		0	
	DRAG PART 3		PART 3 FOR DRAGADOS TEST			09/23/2018	1.00	N	030 013
	0111.00000.000		0149.00000.000						
005402	9-Job/@Price	00612	Bluesville Construction			09/23/2018		0	
	DRAG PART 4		PART 4 FOR DRAGADOS TEST			09/23/2018	1.00	N	030 001
	0500.00011.000		0149.00000.000		72418 100. M				

eCMS User Guide

Importing Order Data

For orders imported without data errors, the data is automatically transferred into the eCMS Order Processing database files. These database files are:

- ORPORD – Open order control file
- ORTMCT – Order Header
- ORTMDT – Order Item Detail
- ORPMOI – Order Instructions
- ORTMDI – Item Description

After successful order data import, process the orders as normal in eCMS.

When data errors are found for an order in the import, the errors must be resolved as described in the Resolving Import Errors section below. The imported data remains in database import work files. These database files are:

- ORTICT – O/E Import - Invoice Control Table
- ORTIDI – Order Processing Import - Item Description
- ORTIDT – O/E Import - Item Detail Table
- ORTIOI – Order Processing Import - Order Instruction



eCMS User Guide

Importing Order Data

Resolve Import Errors

Even though one or more orders are successfully imported, there can still be errors in the data that was imported.

The Order Import Edit report shows any error messages. The report is a spool file with *User Data* "ISP348", which is the report program.

Here is a sample of an order imported with errors.

```
03 023 QA Fix41002
DATE 09/23/2018      ISP348      Order Import Edit
Order #   Order Code  Cust No/Name  Equip No / Description  Order Date  Ticket No  TIME 13.29  2 PAGE
          Part Number  WH    Description  Eq W/O #/CMP/Line #  Ship Date   Ordered   Adj Type  Tax Codes
          G/L Debit    G/L Credit  Job/Sub    Cost Distribution CT
005403 2-Job      00612  Bluesville Construction  09/23/2018
DRAG PART 3      PART 3 FOR DRAGADOS TEST  09/23/2018      1.00      0
0000.00000.000  0149.00000.000  72418      .
ERROR MESSAGE--- Invalid Cost Distribution
ERROR MESSAGE--- Invalid Debit G/L Number
ERROR MESSAGE--- Invalid Debit Application Code
```

eCMS User Guide


Importing Order Data

Order Import Maintenance

Imports > Order Processing > Order Import Maintenance

The Order Import screen is displayed for selecting the order to be maintained.

Enter the order number or use the dropdown to select it then press *Enter* or click **OK** to display the **Control Screen** for the order.

A screenshot of the "Order Import" screen within the "Integration Suite". The screen has a header bar with "Integration Suite" on the left, "Order Import" in the center, and "ISP34601" on the right. Below the header, there are three input fields: "Company" with the value "3", "Division" with the value "23" and a dropdown arrow, and "Order Number" with the value "5403" and a dropdown arrow. The "Order Number" field is highlighted with a blue border. At the bottom right, there are two buttons: "Exit" and "Ok".

In this example, order number 5403 in company/division 3/23 is selected.

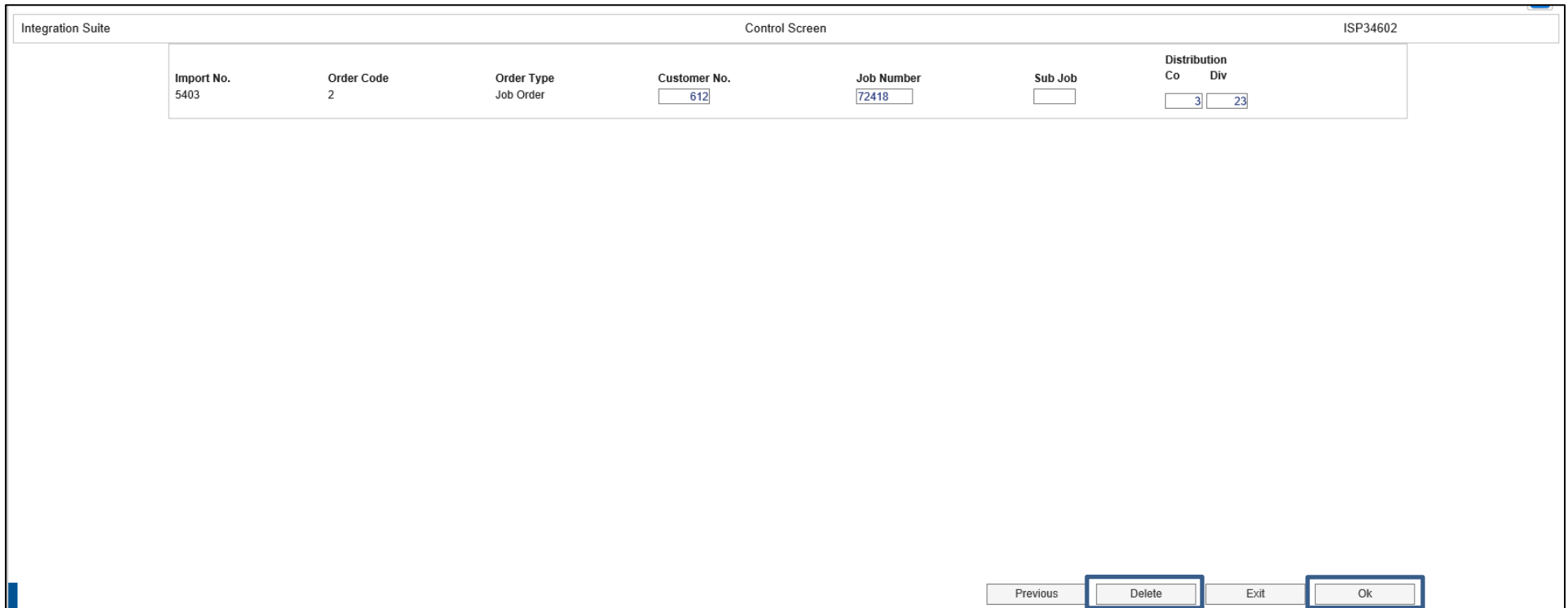
eCMS User Guide

Importing Order Data

The **Control Screen** is displayed for the selected order.

To delete the order, click the **Delete** button. The order can then be re-entered or re-imported with the corrected data.

To make corrections, press *Enter* or click the **OK** button. The *Order Type Detail Screen* will be displayed.

A screenshot of the "Control Screen" in the eCMS system. The window title bar shows "Integration Suite", "Control Screen", and "ISP34602". The main area contains a form with the following fields: "Import No." (5403), "Order Code" (2), "Order Type" (Job Order), "Customer No." (612), "Job Number" (72418), "Sub Job" (empty), and "Distribution Co" (3) and "Div" (23). At the bottom right, there are four buttons: "Previous", "Delete", "Exit", and "Ok". The "Delete" and "Ok" buttons are highlighted with blue boxes.





Import No.	Order Code	Order Type	Customer No.	Job Number	Sub Job	Distribution Co	Div
5403	2	Job Order	612	72418		3	23

Previous Delete Exit Ok

eCMS User Guide

Importing Order Data

Make any changes necessary to the fields shown on the **Detail Screen** and press Enter or click **OK** to save the changes, if any. The **Order Detail** screen, which shows the lines of the order, will then be displayed.

Integration Suite		Job Order - Detail Screen				ISP3463B	
Customer 612		Import Number 5403		Job Number 72418		Operator <input type="text"/>	
Ship To: <input type="text"/>  Bluesville Construction <input type="text"/> <input type="text"/> Bluesville CA <input type="text"/> 91333 <input type="text"/>				Bill To: Bluesville Construction Bluesville CA 91333		Date Ordered <input type="text"/> 09/23/2018 	
				Date Shipped <input type="text"/> 09/23/2018 			
Order Type <input type="text"/> 1		Req/Tck No. <input type="text"/> 0		Adj Type <input type="text"/> 0		Bin Location <input type="text"/>	
						Tax Code <input type="text"/> 1	
						State <input type="text"/> 30	
						Local <input type="text"/> 1 	
Cost Distribution <input type="text"/>		CT <input type="text"/> 		WH <input type="text"/>		B/O <input type="checkbox"/>	
						Ship Via <input type="text"/>	
						Requisitioner <input type="text"/>	
<div> <input type="button" value="Previous"/> <input type="button" value="Exit"/> <input type="button" value="Ok"/> </div>							

The order in this example is a Type 2 Job Order.

eCMS User Guide

Importing Order Data

The lines of the order are shown on the ***Order Detail*** screen.

Integration Suite			Order Detail										ISP346C12						
Del	Inv	Wh	Part	Description	Qty Ordered	Qty Shipped	CST U/M	Unit Cost	Job Number	Sub Job	Cost Distribution	CT	Bin Loc	G/L Debit	G/L Credit	Item Class	Inst	N/C	
<input type="checkbox"/>	<input checked="" type="checkbox"/>		DRAG PART 3	PART 3 FOR DRAGADOS TEST	1.00	1.00		65.330	72418		.			0000.00000.000	0149.00000.000		0		<input type="checkbox"/>

In this example, there was only one line on the order. It is shown here as it was imported: The Cost Distribution, Cost Type and G/L Debit account are missing.

eCMS User Guide

Importing Order Data

Make any changes necessary to correct the data for the order lines.

Press *Enter* or click **OK** to save the changes, if any. The changes will be saved and you will be returned to the **Order Import** selection screen.

Integration Suite			Order Detail								ISP346C12							
Del	Inv	Wh	Part	Description	Qty Ordered	Qty Shipped	CST U/M	Unit Cost	Job Number	Sub Job	Cost Distribution	CT	Bin Loc	G/L Debit	G/L Credit	Item Class	Inst	N/C
<input type="checkbox"/>	<input checked="" type="checkbox"/>		DRAG PART 3	PART 3 FOR DRAGADOS TEST	1.00	1.00		65.330	72418		100.	M			0149.00000.000		0	<input type="checkbox"/>

In this example, valid **Cost Distribution** and **CT** (Cost Type) values were entered and the **G/L Debit** account number was cleared. Now that the cost distribution information has been provided, the **G/L Debit** account number will self-populate.



eCMS User Guide

Importing Order Data

Order Import Edit

Imports > Order Processing > Order Import Edit

Run the Order Import Edit report again to ensure the errors have been resolved. This is the same report that is created when you import the spreadsheet.

Enter any Report selections you normally use and press *Enter* or click **OK** to run the report.

Report Selections		ISP00201
Outq/Hold/Save	<input type="text"/>	<input type="checkbox"/> <input type="checkbox"/>
Job Queue <input type="checkbox"/>		

View the spool file of the report to ensure all errors have been resolved.

DATE 09/24/2018		ISP348		03 023 QA Fix41002					
Order #		Order Code		Cust No/Name		Order Import Edit		TIME 13.42 1 PAGE	
Part Number		WH		Description		Equip No / Description		Ticket No	
G/L Debit				G/L Credit		Eq W/O #/CMP/Line #		Ordered	
						Job/Sub Cost Distribution CT		Non Inv	
005403 2-Job		00612		Bluesville Construction		09/23/2018		0	
DRAG PART 3				PART 3 FOR DRAGADOS TEST		09/23/2018		1.00	
0500.00011.000				0149.00000.000		72418 100. M		N 030 001	

In this example, there are no longer any errors for the order.

eCMS User Guide

Importing Order Data

Order Import Update

Imports > Order Processing > Order Import Update

After the order errors have been corrected, run the **Order Import Update** process to transfer the order into the eCMS Order Processing files. This step completes the process normally done by Import Order Data spreadsheet for the corrected orders.

Enter any Report selections you normally use and press *Enter* or click **OK** to finish the order data import.

A screenshot of a software dialog box titled "Report Selections" in the center. In the top right corner, the text "ISP00201" is displayed. The dialog contains two main sections. The first section is labeled "Outq/Hold/Save" and includes a text input field followed by two empty checkboxes. The second section is labeled "Job Queue" and includes a checkbox that is currently checked with a small checkmark icon.

After the import update process completes, the order data will have been transferred into the eCMS Order Processing database files.

eCMS User Guide

Importing Order Data

Process the Orders as Normal in eCMS

Now that the order data has been successfully imported into the eCMS database, follow the normal Order Processing procedure in **Ord Proc > Processing** to process the order.

- Order Entry 1 Entry
- Order Entry 2 Maintenance
- Order Entry 3 Print Pick Slips
- Order Entry 4 Order Release
- Order Entry 5 Print BO/BL Pick Slips
- Order Entry 6 Invoice Release
- Order Entry 7 Invoice Release by Order Date