# Import Data

## Overview

You can perform the initial set-up of Produmex WMS with the Produmex Import Tool that allows you to import elements through CSV or XML files to the Produmex system.

The following elements can be imported with a CSV file:

1. Box Type by Item for WAS
2. Box for WAS
3. Item – Allergens
4. Item – Batch Attributes
5. Item – Card Code/Shelf Life
6. Item – Card Code/Quality status
7. Item – Packaging types
8. Item – Zone types
9. Item – Warehouse – Location or Zone
10. OSE - Bin
11. OSE - Bin Item
12. OSE - Bin Item WAS
13. OSE - Location Put Away Zones
14. OSE - Location Attributes
15. OSE - Movable location
16. OSE - Zone
17. Route Header
18. Route Line

The following elements can be imported with an XML file:

1. Localization (translation)
2. OSE objects
3. OSE settings

Additional information:

- Bin location import:
  In case of bin locations you can use the tool for updating the existing locations. In case of any other entities, the tool cannot be used for updating them.
- Location attribute import:
  Inheritance applies to location attribute import. The imported location attribute types and their values are automatically inherited from the main zone to sub-zones and bin locations and from sub-zones to bin locations. When a sub-zone or bin location inherits location attribute values, the system allows for selecting a different location attribute value later on.
- Localization import:
  The localization (translation) file is overwritten during a Produmex database upgrade. You must repeat the import after every Produmex database upgrade.
- OSE objects:
  You can import the following Organizational Structure Elements: company, warehouse, zone,

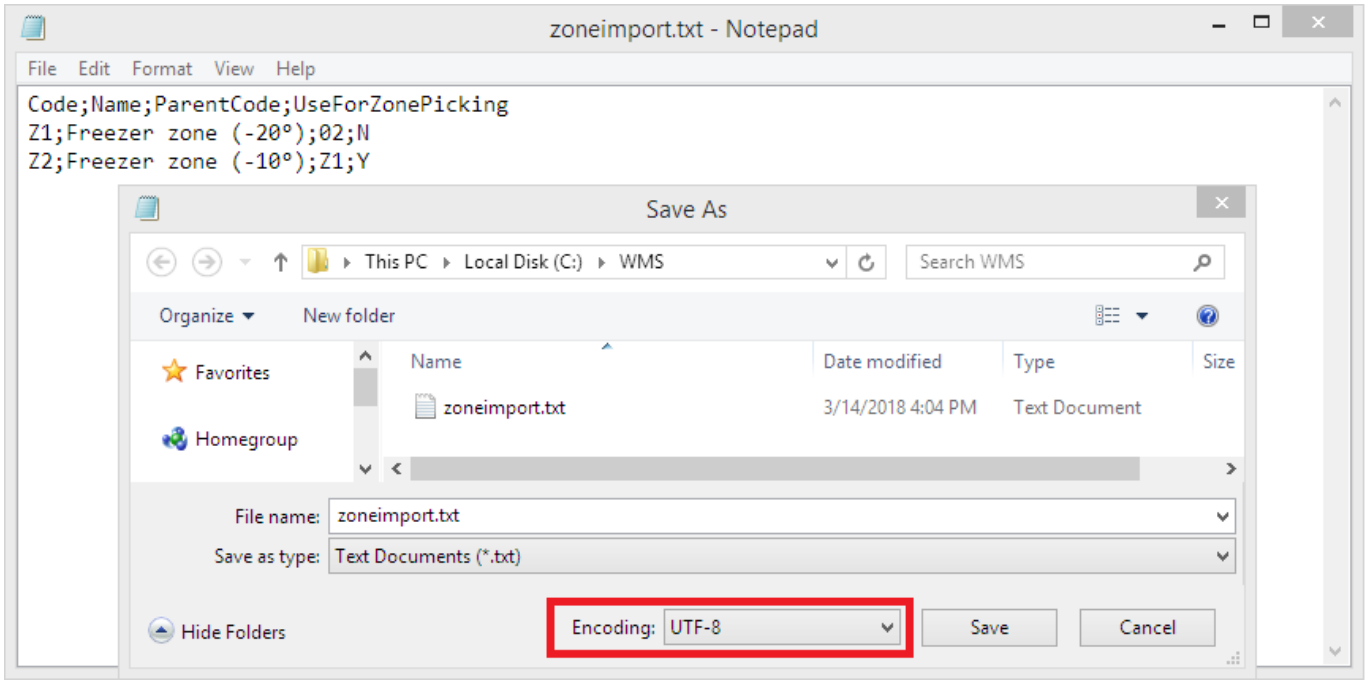
bin, dock, printer, production line, thin Client

# 1. Prepare files

## 1.1 Prepare CSV files

The CSV templates for the Produmex Import Tool can be found in the installation zip folder > Templates > Import Templates subfolder.

Note: If the data to be imported contains special characters (e.g. °), save the CSV file with UTF-8 encoding.




### 1. Box Type by Item for WAS

Template: ImportBoxTypeforWAS

- Code
- Name
- U_BoxType: The box type
- U_ItemCode: The item code
- U_Quantity: The quantity of the item that can be stored in the given box type.
- U_DividerType: The divider type
- U_CompartmentNr: The number of compartments a box has.

Fill in the worksheet and save the worksheet as a CSV file. The CSV file should look like this:

```
Code;Name;U_BoxType;U_ItemCode;U_Quantity;U_DividerType;U_CompartmentNr
C1;C1;BT1;ITEM02;25;DIV1;3
```

### 2. Box for WAS

Template:ImportBoxForWAS

- Code: The box code
- Name: The box name
- U_BoxType: The box type. The box type should exist in the Box type for WAS user table.

Fill in the worksheet and save the worksheet as a CSV file. The CSV file should look like this:

```
Code,Name,U_BoxType
C1;C1;BT1
C2;C2;BT2
```

### 3. Item – Allergens

Template: ImportItemAllergens

- ItemCode: The item code. Must be an item defined in SAP Business One.
- AllergenCode: The allergen code. Must be an allergen code defined on the Allergen types user table.
- Can contain allergen (Y/N): If set to 'Yes', the item does not contains the allergen by default, but it is possible that there are some traces of this allergen present.

Fill in the worksheet and save the worksheet as a CSV file. The CSV file should look like this:

```
ItemCode;AllergenCode;CanContainAllergen
A006;GLUTEN;Y
A006;EGGS;N
```

### 4. Item – Batch Attributes

Template: ImportItemBatchAttributes

- Item code: The item code. Must be an item defined in SAP Business One.
- BatchAttributeCode: The batch attribute code. This code should exist in the PMX_BATT user table.
- ValueEntryOption: This will set whether the value should be asked during reception. Possible values:
  - Required: User will have to fill in the data.
  - Optional: User can skip entry of the data.
  - Hidden: This batch attribute will not be asked during reception.
- IsLinkedToBatch (Y/N): Is the batch attribute linked to a batch number?

Fill in the worksheet and save the worksheet as a CSV file. The CSV file should look like this:

```
ItemCode;BatchAttributeCode;ValueEntryOption;IsLinkedToBatch
02004;COUNTRY_OF_ORIGIN;OPTIONAL;N
```

```
02004;MANUFACTURING_DATE;HIDDEN;N
02005;COUNTRY_OF_ORIGIN;REQUIRED;N
```

### 5. Item – Card Code/Shelf Life

Template: ImportItemCustomerShelfLife

- ItemCode: The item code. Must be an item defined in SAP Business One.
- CardCode: The cardcode of the customer. Must be a customer defined in SAP Business One.
- CountryCode: The country code for this shelf life. (optional)
- ShelfLifeInDays: Shelf life for the customer for the item.

Fill in the worksheet and save the worksheet as a CSV file. The CSV file should look like this:

```
ItemCode;CardCode;ShelfLifeInDays
A006;K00001;94
```

### 6. Item – Card Code/Quality status

Template: ImportSupplierQualityStatus

- ItemCode: The item code. Must be an item defined in SAP Business One.
- CardCode: The card code of the supplier. Must be a customer defined in SAP Business One.
- QualityStatusCode: The code of the quality status. Must be a quality status defined on the Quality status tab of the Organizational Structure

Fill in the worksheet and save the worksheet as a CSV file. The CSV file should look like this:

```
ItemCode;CardCode;QualityStatusCode
A006;V00002;BLOCKED
```

### 7. Item – Packaging types

Template: ImportItemPackagingTypes

- ItemCode: The item code. This item code must be known in SAP Business One.
- PackagingTypeCode: The SAP UoM code.
- Quantity: The quantity of the inventory unit of measure.
- BarcodeType: Fixed value. Possible values:
  - G: Use this value for a GTIN14 barcode type (System will do a check if it is a valid GTIN-14 barcode).
  - F: Use this value for a Free Barcode type (System will perform no check).
- Barcode: The Barcode of the Packaging Type.
- AskDuringReception:
  - N: The system will not ask the quantity in the packaging type during the reception process.
  - Y: The system will ask the quantity in the packaging type during the reception process.

    - Remark: if the item is not managed in batches, the system will not allow a 'Y' value in this field.
- HideDuringEnteringQuantity
    - N: The user cannot enter how much packaging types he is receiving.
    - Y: The user can enter how many packaging types he is receiving.

Fill in the worksheet and save the worksheet as a CSV file. The CSV file should look like this:

```
ItemCode;PackagingTypeCode;Quantity;BarcodeType;Barcode;AskDuringReception;H
ideDuringEnteringQuantity
ITEM02;BOX;12;G;12345678901231;Y;N
```

### 8. Item – Zone types

Template: ImportItemZoneTypes

- ItemCode: Item of the zone type. Must be an item defined in SAP Business One.
- ZoneTypeCode: The code of the Zone Type. The Zone Type must exist in the organizational structure of Produmex.

Fill in the worksheet and save the worksheet as a CSV file. The CSV file should look like this:

```
ItemCode;ZoneTypeCode
A006;C
```

### 9. Item – Warehouse – Location or Zone

Template: ImportItemWarehouseLocationOrZone

- ItemCode: The item code. Must be an item defined in SAP Business One.
- PmxWhsCode: The Produmex code of the warehouse. The warehouse must exist in the organizational structure of Produmex.
- DefaultLocationZone: The code of the location or zone that is default location/zone in the warehouse for the item. The location/zone must exist in the organizational structure of Produmex.

Fill in the worksheet and save the worksheet as a CSV file. The CSV file should look like this:

```
ItemCode;PmxWhsCode;DefaultLocationZone
ITEM01;WH01;A0001
ITEM01;WH02;ZONE2.2
```

### 10. OSE - Bin

Template: ImportBin

- Code: The scancode of the bin
- Name: The name of the bin

- Parentcode: The code of the structure element where the bin belongs to. The parent element must exist in the organizational structure of Produmex.
- Is Active (Y/N): Is the location active?
- IsDestinationForPicking (Y/N): Can the location be selected to put products on after a picking? Is the location a 'pick and hold' – location?
- CanBeLinedUp (Y/N): Can the location be lined up during a production process. (Mostly used for Tanks/ Silo's)
- Sequence: The order in which the products at this location are used to compose a picking order. The pick locations with the lowest sequence number are used first to complete the pick order.
- IsPickLocation: Can the location be used to perform item picking?
- IsFixedItem (Y/N): Is the location a fixed pick location?
- CanBeReplenished (Y/N): Can the location be replenished?
- AllowCountDuringCycleCount (Y/N): Is the location allowed to be counted?
- CountAfterNumberOfDays: The number of days after the location needs to be counted again.
- MaximumLogisticUnits: The maximum number of allowed logistic units.
- ItemStorageLocationType: Defines the item storage location type. Must be an existing Item Storage Location type stored in the PMX_ISLT user table.
- VerificationCode: Verifies bin locations in the different flows. See more.

Fill in the worksheet and save the worksheet as a CSV file. The CSV file should look like this:

```
Code;Name;ParentCode;IsActive;IsDestinationForPicking;CanBeLinedUp;Sequence;
IsPickLocation;IsFixedItem;CanBeReplenished;AllowCountDuringCycleCount;Count
AfterNumberOfDays;MaximumLogisticUnits;ItemStorageLocationType;VerificationC
ode
E01A001;E01A001;Zone1;Y;N;N;100;Y;N;N;Y;0;;;
A05A05;A05A05;Zone2;Y;N;N;120;Y;N;N;Y;0;;;
```

Note: In case of bin locations you can use the tool for updating the existing locations.

### 11. OSE - Bin Item

Template: ImportBinItem

- ParentCode: The code of the Bin location. The bin location must exist in the organizational structure of Produmex.
- ItemCode: The item code. Must be an item defined in SAP Business One.
- MinimumNumberOfItems: The minimum quantity of the item on the location. If the quantity falls below the minimum the system will generate a replenishment order.
- MaximumNumberOfItems: The maximum quantity the location can contain of the specified item on the specified location.
- NumberOfItemsToReplenish: Quantity that should be used to replenish a fixed pick location.

Fill in the worksheet and save the worksheet as a CSV file. The CSV file should look like this:

```
ParentCode;ItemCode;MinimumNumberOfItems;MaximumNumberOfItems;NumberOfItemsT
oReplenish
E01A001;A0001;10;999;10
```

### 12. OSE - Bin Item WAS

Template: ImportBinItem

- ParentCode: The code of the Bin location. The bin location must exist in the organizational structure of Produmex.
- ItemCode: The item code. Must be an item defined in SAP Business One.
- MinimumNumberOfItems: The minimum quantity of the item on the location. If the quantity falls below the minimum the system will generate a replenishment order.
- MaximumNumberOfItems: The maximum quantity the location can contain of the specified item on the specified location.
- NumberOfItemsToReplenish: Quantity that should be used to replenish a fixed pick location.

Fill in the worksheet and save the worksheet as a CSV file. The CSV file should look like this:

```
ParentCode;ItemCode;MinimumNumberOfItems;MaximumNumberOfItems;NumberOfItemsT
oReplenish
E01A001;A0001;10;999;10
```

### 13. OSE - Location Put Away Zones

Template: ImportLocationPutAwayZones

- ParentCode: The code of the parent structure element. The bin location must exist in the organizational structure of Produmex.
- PutAwayZone: The code of the put away zone.
- SortPickSequenceDescending (Y/N): Are the locations belonging to the put away zone sorted by the pick sequence descending?
- Sequence: The sequence number for the put away zone.
- BelongsTo (Y/N): Does the location belong to the put away zone?

Fill in the worksheet and save the worksheet as a CSV file. The CSV file should look like this:

```
ParentCode;PutAwayZone;SortPickSequenceDescending;Sequence;BelongsTo
A11;Z1;Y;1;N
AA10;Z1;Y;2;N
AA10;Z4.1;Y;3;N
AA10;Z4;Y;4;N
```

### 14. OSE - Location Attributes

Template: ImportLocationAttributes

- OSECode
- AttributeCode
- AttributeValue

Fill in the worksheet and save the worksheet as a CSV file. The CSV file should look like this:

```
OseCode;AttributeCode;AttributeValue
AAA1;AT1;abc
Zreception;AT1;def
Zreception;AT3;2
AA3;AT3;33
AA3;AT4;LV_2
```

### 15. OSE - Movable location

Template: ImportMoveableLocation

- Code
- Name
- ParentCode
- IsActive (Y/N)

Fill in the worksheet and save the worksheet as a CSV file. The CSV file should look like this:

```
Code;Name;ParentCode;IsActive
ML89;ML-89B;Zsale;Y
ML99;ML-99A;02;N
```

### 16. OSE - Zone

Template: ImportZones

- Code: The code of the zone
- Name: The name of the zone
- Parentcode: Code of the warehouse/zone the zone belongs to. The parent element must exist in the organizational structure of Produmex or must be defined in the same import file in a preceding line.
- UseForZonePicking (Y/N): Can this zone be selected on the Zone Picking Flow?

Fill in the worksheet and save the worksheet as a CSV file. The CSV file should look like this:

```
Code;Name;ParentCode;UseForZonePicking
Z1;Zone1;02;N
Z2;Zone2;Z1;Y
```

### 17. Route Header

Template: ImportRouteHeader

- Code: The code of the route template.
- Name: The name of the route template.
- Weekday: The code of the weekday.
- StandardLoadingDock: The loading dock assigned to the route template. Must be a loading dock

that exists in the organizational structure of Produmex.

Fill in the worksheet and save the worksheet as a CSV file. The CSV file should look like this:

```
Code;Name;Weekday;StandardLoadingDock
Test;Test route header;2;D2.1
Test2;Test2 route header;3;D2.1
```

#### 18. Route Line

Template: ImportRouteLine

- ParentCode: The route template code.
- CardCode: The cardcode of the customer.
- Sequence: Defines the shipping order of the route.
- ShipToCode: The ship to code of the customer. Must be an existing Ship To code.

Fill in the worksheet and save the worksheet as a CSV file. The CSV file should look like this:

```
ParentCode;CardCode;Sequence;ShipToCode
Test;C00002;1;Customer 2 B
Test2;C00001;2;Customer 1
Test2;C00002;1;Customer 2 B
```

## 1.2. Prepare XML files

#### 1. Prepare Localization file

When preparing the Localization file, with the Produmex Import Tool you can convert the file from XML to CSV and CSV to XML. In the drop-down menu you can select one of the following options:

- XML > CSV
- CSV > XML (New)
- CSV > XML (Update): In case of update, provide the language code. The system updates the existing XML file only for the given language.

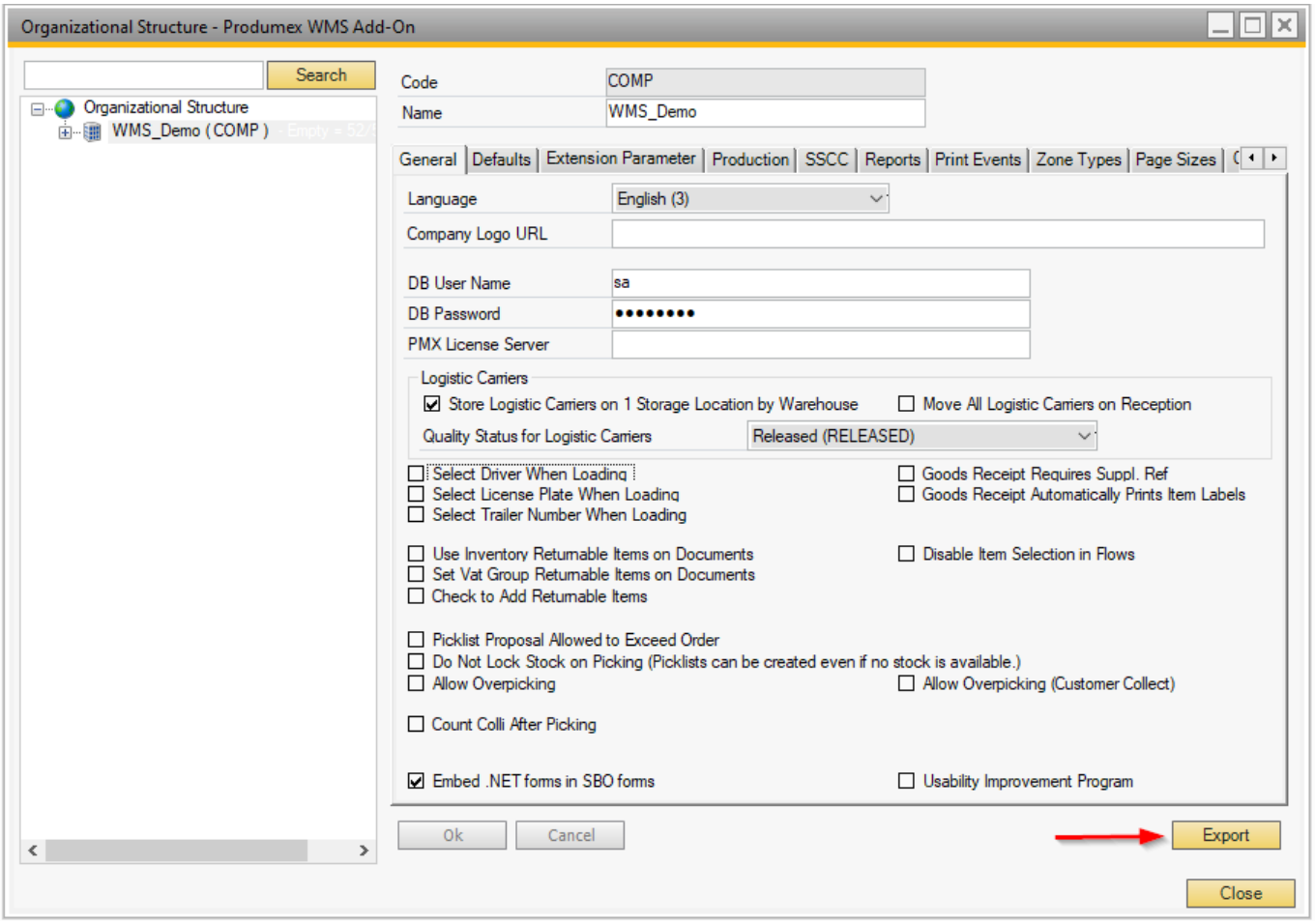
#### 2. Prepare OSE settings XML

With this function the following configurations are exported:

- General settings (except Language, Logo and DB Credentials)
- Default tab settings: default quality statuses (Default quality status reception, Released quality status reception, Quality status sales return, Quality status cycle counting, Quality status returnable items)
- Production tab settings: Quality status production
- 3PL Invoicing settings
- Extension Parameters

1. Go to the General tab of the Organizational Structure.

2. Click `Export`. The configurations are exported to an XML file.




3. Select the destination folder for the export.

The default folder is C:\Program Files\SAP\SAP Business One\AddOns\PMX\Produmex Add-On Loader 20

4. The *export is finished* message indicates that the export is finished. Click **OK**.

When the XML file is imported, it means that you have imported the data to the General tab, 3PL Invoicing tab and Extension Parameters tab of the Organizational Structure.

# 2. Import data

## 2.1. Run the Produmex Import Tool

1. Run the Produmex.Sbo.Logex.Tools.ImportTool.exe file.

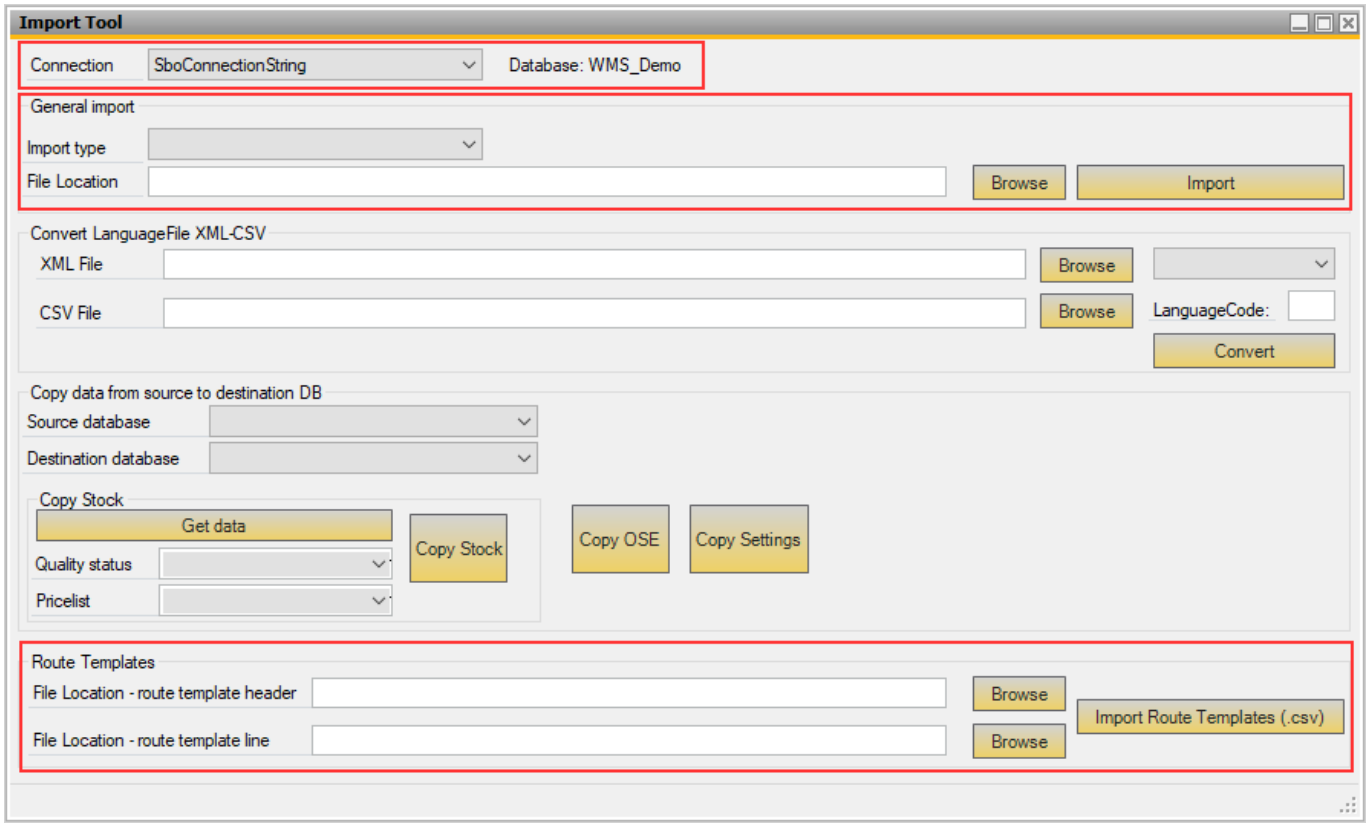
Path: C:\Program Files\Produmex\Produmex Tools

2. Select a connection string from the Connection dropdown menu to define the destination database. Every connection string defined in the configuration file of the Produmex Import Tool can be selected

(*Produmex.Sbo.Logex.Tools.ImportTool.exe.config*).

The selected connection string connects the database to the tool.

3. Perform the importing process (see general import or route templates).




## 2.2. General import

1. Select the import type in the Import type drop-down menu.

The following import types can be selected in the Import type drop-down menu:

- Box Type by Item for WAS (.csv)
- Box for WAS (.csv)
- Item – Allergens (.csv)
- Item – Batch Attributes (.csv)
- Item – Card Code/Shelf Life (.csv)
- Item – Card Code/Quality status (.csv)
- Item – Packaging types (.csv)
- Item – Zone types (.csv)
- Item – Warehouse – Location or Zone (.csv)
- Localization (.xml)
- OSE objects (.xml)
- OSE settings (.xml)
- OSE - Bin (.csv)
- OSE - Bin Item (.csv)
- OSE - Bin Item WAS (.csv)
- OSE - Location Put Away Zones (.csv)

- OSE - Location Attributes (.csv)
- OSE - Movable location (.csv)
- OSE - Zone (.csv)

2. Browse the file.

3. Click on the `Import` button. At the bottom of the window the tool shows that the import has finished.

In case of OSE - Location Attributes and OSE - Movable location:

- the tool asks if you want to overwrite the existing objects or skip them,
- with the end of the import the tool also displays the number of inserted, updated and ignored objects.

4. Restart the add-on.

## 2.3. Import Route Templates

1. Browse the Route Header.csv file in the File Location - route template header field.

2. Browse the Route Line.csv file in the File Location - route template line field.

3. Click the `Import Route Templates (.csv)` button. At the bottom of the window the tool shows that the import has finished.

4. Restart the add-on.

## 2.4. OSE Objects Xml File Samples

OSE Objects Xml File Samples

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