



Property of WilloWare Incorporated

DS0170
Contract Line Import Program (CLIP)



Table of Contents

Table of Contents	2
Problem Definition	3
Solution Overview.....	4
Design Features	5
Setup	5
Contract Line Import Program.....	6

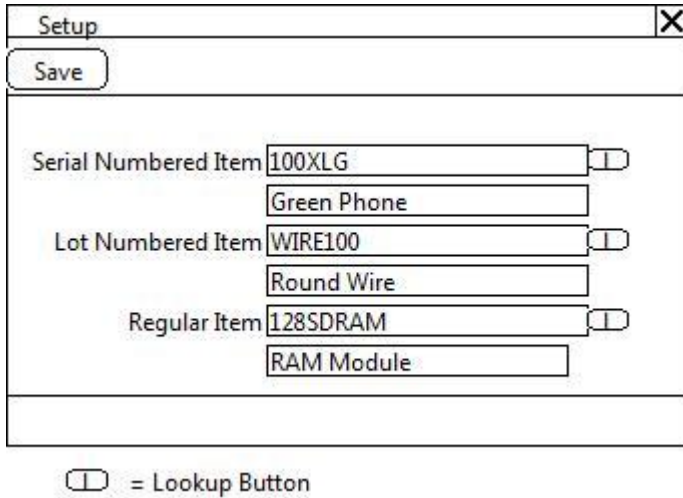
Problem Definition

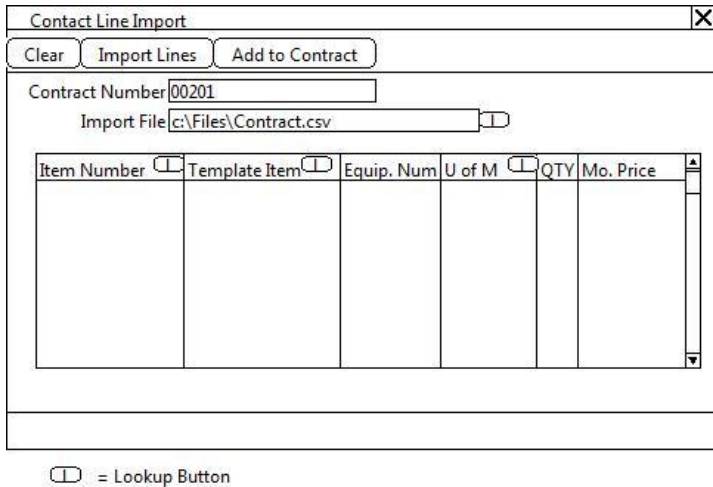
<i>Problem Definition</i>	CCDA
<p>ACMECO provides contracted supported services for mass storage. Their customer will send a file containing the equipment that will be covered under the support contract. The file can contain a large number of items, with contacts sometimes having over 5000 items.</p> <p>It is very labor intensive for a user to manually enter several thousand lines items on a contract.</p> <p>Additionally, GP requires that the items exist in the Item Master, so the user must also manually create Inventory records for new Item Numbers.</p>	

Solution Overview

<i>Solution Overview</i>	CCDA
<p>The user will create the contract (filling in the fields on the main Contract Entry/Update window), then launch a new Contract Line Import Program window.</p> <p>The Contract Line Import Program will import a list of service contract items, automatically create Item Maintenance and Equipment records when needed, and add the items to a contract.</p>	

Design Features

Setup	CCDA
<p>The Setup window is used to specify “template” items. When the import contains an Item Number that does not exist in GP, the system will use one of the Template Items to create default setup for the new Item Number.</p> <p>The Setup window will be accessed from Cards >> Contact Administration >> Setup Template Items</p> <div data-bbox="388 690 1066 1185" data-label="Image">  <p>The screenshot shows a window titled "Setup" with a close button (X) in the top right corner. Below the title bar is a "Save" button. The main area contains three sections, each with a label and two input fields. The first section is "Serial Numbered Item" with values "100XLG" and "Green Phone". The second is "Lot Numbered Item" with values "WIRE100" and "Round Wire". The third is "Regular Item" with values "128SDRAM" and "RAM Module". Each input field has a small "Lookup" button icon to its right. Below the input fields is a legend: a "Lookup" button icon followed by "= Lookup Button".</p> </div> <p>When new items need to be created CLIP will get the item type from the import file (none, serial, lot). Based on the Item Type CLIP will pick the correct template item from the setup, then use the Item Copy module from WilloWare’s MFG PowerPack to generate a new Item Number using the settings from the Template Item.</p>	

Contract Line Import Program		CCDA
<p>CLIP will be accessed from the Extras menu on Contract Entry/Update. It will automatically pull in the Contract Number from the Contract Entry/Update window.</p> 		
Field	Function	
Contract Number	Not Editable. This number is pulled in automatically when CLIP is opened from Contract Entry/Update.	
Import File	User selects a XLS file with the contract lines (format is detailed below)	
Item Number	The Item Number from the import file.	
Template Item	If the Item Number does not already exist in GP, this field will automatically populate with the appropriate Template Item from Setup. The user can change this to a different item if needed.	
Equipment Number	If present, CLIP will create an Equipment Record when the lines	

	are added to the contract.
U of M	Displays the U of M provided in the CSV file. If no CSV is provided, it defaults to the item's Base Unit of Measure. This can be changed if needed.
QTY	Quantity from the import file
Mo. Price	Monthly Price from the import file. Can be changed by the user.
	THE SECOND ROW OF COL. HEADERS IS NOT SHOWN
Item Description	From the import file
Contract Start/End dates	Displays the start/end dates from the import, or defaults to the values on the contract. Editable by the user.
Bill Start/End	Displays the start/end dates from the import, or defaults to the values from the contract. Editable by the user.
	BUTTONS
CLEAR	Clears all values from the window
IMPORT LINES	Reads the import file and populates the scrolling window. Does not add them to the contract
ADD TO CONTRACT	Adds the information from the scrolling window to the Contract Lines.

The import file must be a CSV file and must have the following layout. The first row will contain column headers. The row may be left blank, it will not be used by the import. The data must start in the second row.

- ItemType: valid inputs are 0=regular item, 1=serial numbered item, 2=lot numbered item
- ItemNumber: allowed characters are 0-9, A-Z (upper case), and – (dash). All other characters will be removed. 30-char max.
- ItemDescription: 100 char max. Must not contain commas, apostrophes or quotation marks.
- EquipmentNumber: 15 char max. Same allowed characters as Item Number. This may be the Serial Number or Lot Number. If blank the system will automatically create an Equipment Number using the next available Equipment ID from the Equipment Master table (SVC00300).
- MonthlyPrice



<p>Note: the quantity of each item is assumed to be one (1), and the unit of measure is the item's Base Unit of Measure (i.e. EACH).</p>	
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