

Macola Import Utility

by Harvest Ventures Inc.

Easily import master data into your Macola database

Importing and updating data is quick and easy with the Macola Import utility by Harvest Ventures Inc. You can import data into Macola from other programs or data sources in a few simple steps reducing the need for manual entries.

This Business Automation Tool (BAT) is often used by companies who are implementing Macola ERP software for the first time to easily transfer their data from their old database to their new Macola database.

Some other examples of uses for this utility include:

- Importing orders from websites
- Copying orders between different databases
- Copying a large number of repetitive master orders to live orders each month
- Loading master data from a recently acquired company
- Loading a new item number schema

Dynamic mapping

The dynamic mapping tool included with this utility means that the source file can

be any Excel/tabular format.

The utility can complete address and ship-to details just by mapping the Customer field (in a sales order for example). If a field is not mapped, the Macola Import utility will get the data from appropriate files such as the customer master or item master, or it will put in a legal and appropriate value for the field. In addition, lookup and select statements can be used.

Once created, mapping templates can be saved for future use. This is an especially useful feature as businesses will create import mappings related to different import file layouts, functions, users, and/or internal databases.

Flexible options

The Macola Import utility offers flexible user options:

Users can run multiple import routines automatically – one after another. This functionality is great for companies that require customers or items to be entered in a particular sequence. ►

Features:

Direct import from an Excel spreadsheet or tabular data source

Dynamic, user defined mapping capabilities

Configuration capability to embed dynamic logic based on data

Defaults can be set for fields as required

Import settings can be saved as templates

Imports can be run in a pre-defined sequence

Creates new customers, vendors, items and update existing records

Handles binned and serial lot items

Handles OE to PO link



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Fully dynamic mapping tool to accommodate any tabular data source

Flexible options continued...

Results and log files can be pushed to appropriate users via email.

Another feature of the Macola Import tool is its ability to generate the Excel file to be imported into Macola simply by executing a query from any database you select.

Purchase only what you need

For Macola users who are interested in importing a specific type of data, Harvest Ventures offers a breakdown of the full Macola Import tool grouped by type of data import.

Customer and Vendor Import

This tool is commonly used by new Macola users who wish to import data that is currently in a different system. Additionally, the utility is useful following the acquisition of new businesses to combine the data into a single (Macola) database. Many Macola clients will also use this utility to update existing customer and vendor records.

Item Import

The Import Items utility is often used

by businesses when a new company is acquired - a company will use the tool to load new items from the acquired company into its existing Macola database. The utility is also useful for loading new item number schemas and updating existing item records.

Purchase Order Import

The Macola Import utility offers the ability to import open purchase orders from another system or Excel file into Macola.

Sales Order Import

If you have an eCommerce website, the Sales Order Import functionality is very useful to create the sales orders generated from your website into your Macola database. The tool can create customers and items as well as update existing customer and/or item information at the same time as it generates the sales order. This is particularly useful when importing orders from a retail site as the majority of customers are often new customers. The utility handles the OE to PO link as well as binned and serial lot items.

Compatible with:

- Macola 10
- Macola ES
- Progression

Benefits

Flexible mapping and configuration options

Efficient one-click imports with the ability to save mapping templates and pre-defined import routines

Easily transfer orders from your eCommerce site to Macola

Ensure data is accurate by reducing manual intervention

Notifications and error logs are emailed to users saving time and clicks



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