How to...

Import Materials from CSV Version 4.50 and Above (Metric Sizes)

Introduction

Accura has the ability to import materials from data files provided by your suppliers. In Version 4.50 this has changed slightly to allow for multiple price breaks and compatibility with the North American market. As a result, some field names have changed since Accura 4.21. These changes are documented in the table on page 4

This document provides an overview of the file format required & how to import materials from a file. If your material supplier needs information on what type of file to supply for import into Accura, you can pass this document onto them

Required File Format

The file must be supplied in an ASCII CSV (comma separated value) format. This means the data is in a pure text-readable format, with each item ('field') of data (description, weight, price etc.) separated by a comma symbol. Each material record must be saved on a new line

Most database and spreadsheet applications can read and save data in this format. If you open a CSV file in a spreadsheet application such as Microsoft Excel, each row will contain a single material, and each column will contain a different field

It is also important that data is unformatted, for example: £150.23 should be 150.23, (no currency) 12,500 should be 12500 (no comma), 300gsm would be 300 (no gsm). All weights must be in GSM

The order of the 'fields' is not important; however it is useful to have the first line in the file showing the field names, for example:

`DESCRIPTION, DEPTH, WIDTH, WEIGHT, SUPPREF, PRICE, UNIT, PACK`

An example file format is provided below:

```
CHALLENGER ART,450,640,350,CA10,73.58,1000,1000
CHALLENGER ART,450,640,500,CA20,71.56,1000,1000
CHALLENGER ART,480,650,350,CA30,79.71,500,1000
CHALLENGER ART,450,640,400,CA40,84.09,1000,1000
CHALLENGER VELVET,450,640,350,CV10,73.58,250,1000
CHALLENGER VELVET,450,640,500,CV20,71.56,250,1000
CHALLENGER VELVET,450,640,400,CV40,84.09,500,1000
```

Required Fields

These fields MUST be present in the file if you are importing all materials listed in the file. **If you are only updating the materials that already exist in your database refer to Updating Materials on page 2 of this document**. Their contents must be in the correct format and their values (if numeric) must lie between the minimum and maximum values provided. This is the minimum amount of data required to allow your materials to import into Accura:

- **Description** – Full material description. Alphanumeric format 255 chars max

- **Depth** – Material depth in millimetres for Sheets and metres for Reels. Numeric format 7.2 digits; range: 0.01 – 9,999,999.99

- **Width** – Material width in millimetres (Sheets or Reels). Numeric format 7.2 digits; range: 0.01 – 9,999,999

- **Weight** – Weight of material in gsm. Numeric format 4.0 digits; range: 1 – 9999. Must be in gsm. Microns must be converted to gsm before importing

- **SupplierRef** – Your supplier's part number or stock code. Alphanumeric format 25 chars max. Accura uses the SupplierRef field to try to locate the material in the database to see if it can be updated or not, for example to update supplier prices. If the SupplierRef is NOT present in the Accura database, a new material will be created

- **CostRate** – Your standard cost rate price per unit (e.g. per 1000). Numeric format 5.4 digits; range: 0.0001 – 99,999.9999

- **CostUnit** – Cost rate pricing unit. Alphanumeric format; supported values: 1000, 500, 250, 200, 100, 10, 1, Reel, Length (linear metres), Area, Pack, Weight (per kilo), Tonne. Units MUST be specified exactly as above. No other units are supported

- **PackQty** – Pack quantity of material. Numeric format 5.0 digits; range: 1 – 99,999

Optional Fields

The following fields are not required, but will complete the information in the materials database if used:

- **Code** – Material code. Alphanumeric format 25 chars max. If supplied, Accura will use this field for the material code. If not supplied, Accura will automatically generate a material code from the first few characters of the description plus a random number. If material codes are supplied, they MUST be unique, otherwise the import process will fail

- **Colour** – Colour of the material. Alphanumeric format 10 chars max

- **Finish** – Finish of the material, e.g. Gloss, Matt, Coated, Uncoated etc. Alphanumeric format 10 chars max

Bulk Rates for Materials

If you obtain materials at preferential rates for bulk quantities, we suggest you use the Cost Rate 1-5 and Cost Quantity 1- 5 fields to indicate where the price breaks occur and include the bulk rate prices in the import file

For example, your supplier can supply a material in three different quantities, 500, 2500 and 12500 with cheaper rates for the more you order. Previously you would have needed three lines with differing Supplier Reference numbers in the material table. Now you can allow for these occurrences by setting the import file in the following format

MTL:CostQty1	MTL:CostQty2	MTL:CostQty3	MTL:CostRate1	MTL:CostRate2	MTL:CostRate3
500	2500	12500	23.15	22.78	21.85

Cost Quantities & Cost Rates only apply if there is a sliding scale of charges. If price is constant (i.e. does not decrease on quantity purchased) only CostRate1 is needed (CostQty1 will automatically default to 999,999,999)

Updating Materials

If you wish to update the materials that already exist in your database, you do not need to map all of the fields. The import facility will only update the fields that are mapped. So if you do not map a field during import then the data that is within the corresponding Accura material field will not be updated & will remain as it is

The following fields must be present in the file & are the only ones that need to be mapped during import. **You must also tick Ignore new materials in the Options tab of the import window**

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Tel: +44 (0)23 8024 0470
Email: support@accuramis.com

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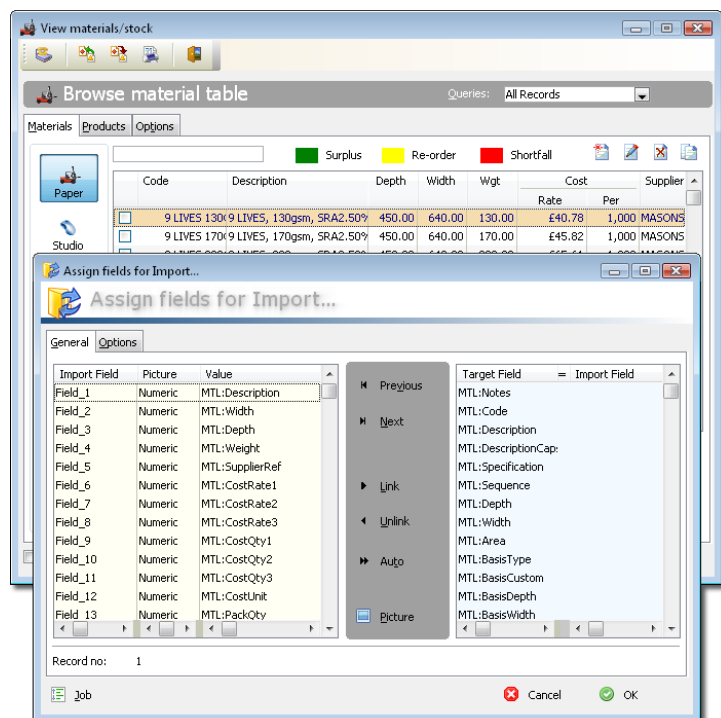Fax: +44 (0)23 8025 2573
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- **SupplierRef** – Your supplier's part number or stock code. Alphanumeric format 25 chars max. Accura uses the SupplierRef field to try to locate the material in the database to see if it can be updated or not, for example to update supplier prices. If the SupplierRef is NOT present in the Accura database & you have ticked Ignore new materials in the Options tab of the import window new materials will be ignored

- **CostRate** – Your standard cost rate price per unit (e.g. per 1000). Numeric format 5.4 digits; range: 0.0001 – 99,999.9999

- **CostUnit** – Cost rate pricing unit. Alphanumeric format; supported values: 1000, 500, 250, 200, 100, 10, 1, Reel, Length (linear metre), Area, Pack, Weight (per kilo), Tonne. Units MUST be specified exactly as above. No other units are supported

Do's & Don'ts

- Machines within Accura are generally set up as landscape; ensure that your material dimensions follow the same orientation

- Weights are important. If there is no weight specified within the file, Accura will set it as 100gsm, which will cause inaccurate weight calculations in quotes

- Only import the materials you require into Accura, it is common for material files to be supplied with every item your supplier can provide, and this will flood your material list in Accura with materials you will never use. Accura will run faster with less materials, and you will find your materials more easily when estimating if there are less of them

- Don't specify a supplier name or code in the import file. The supplier code can be chosen from Accura's database when importing the data into Accura, giving you the ability to sort and filter the materials by supplier. Specifying the supplier directly in the import file will not link the materials properly to the supplier in Accura's database and these features will not work

- **Backup your database before you import. The importance of this cannot be stressed enough.** Correcting badly imported data can be time consuming

Importing the CSV File into Accura

- From within Accura, select the **Material Table** from the **Quote** menu

- Click on the Import button. The Select file to import from window will appear. Browse & select the .csv file provided by your supplier

- You will now have an Assign fields for import window. The left pane displays the column headings in the file supplied, on the right, the fields within Accura are displayed. Highlight the first field on the left and the desired field in Accura on the right, then click link to map it

- Repeat this operation until all required fields within your file have been linked to the appropriate field within the Accura database

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Email: support@accuramis.com

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Web: www.accuramis.com

The following table lists all of the common field names supplied in material import files, along with the exact Accura field they mapped to prior to Accura 4.50, and the exact Accura field they map to in Accura 4.50 and above

Value	Field Name Before 4.50	Field Name 4.50 and Above
Description	MTL:Description	MTL:Description
Width	MTL:Width	MTL:Width
Depth	MTL:Depth	MTL:Depth
Weight	MTL:Weight	MTL:Weight
Supplier Reference	MTL:SuppRef	MTL:SupplierRef
Contract Rate 1 - 5	MTL:ContractRate	MTL:CostRate1 - 5
Contract Quantities	MTL:ContractQty	MTL:CostQty1 - 5
Contract Unit	MTL:ContractUnit	MTL:CostUnit
Pack Quantity	MTL:PackQty	MTL:PackQty

- Click on the **Options** tab. Here you can tick Strip header record (field names) to strip the file header record on import so it is ignored in the routine

- To update records that already exist within the database, tick Update record if exists. This function checks to see if the Suppliers Reference (SupplierRef) exists. If it does the material will be updated. If not a new material will be created

- To ignore new materials, and only update those that already exist, tick Ignore new materials. This function looks for the suppliers reference, if it exists the material is updated, if it doesn't it is ignored. **You must tick this box if you are updating existing materials only.**

- To import materials as stock records, assign a Group code, and tick Import as stock records

- Choose your **Supplier code**

Once all selections have been made, push the OK button & the import routine will commence. When importing is completed Accura returns to the View materials window

For further information on Accura's material file format, please contact **Data Design Services** on **+44 (0)23 8024 0470**, or email: support@accuramis.com

To have your CSV file checked for compatibility BEFORE importing, please email it to the above address, stating your company name, merchant name, and installation date

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