Import mapping

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Bookings import - required fields
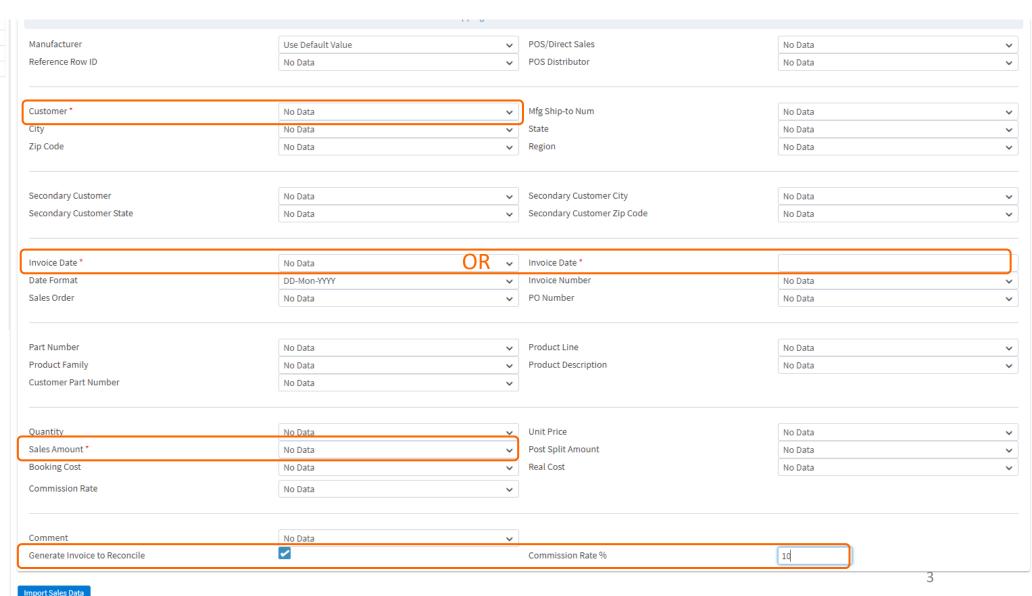## Import as POs

- **Customer**
- **PO Date**
- **Projected Revenue**
- **Generate PO/ Commission Rate%**

Sales Import - required fields
Import as Invoices or Sales History

Re-Aliasing
Error List
Reprocess Split
Import Company Aliases

Manufacturer	Use Default Value	POS/Direct Sales	No Data
Reference Row ID	No Data	POS Distributor	No Data

Customer *	No Data	Mfg Ship-to Num	No Data
City	No Data	State	No Data
Zip Code	No Data	Region	No Data

Secondary Customer	No Data	Secondary Customer City	No Data
Secondary Customer State	No Data	Secondary Customer Zip Code	No Data

OR

Invoice Date *	No Data	Invoice Date *	
Date Format	DD-Mon-YYYY	Invoice Number	No Data
Sales Order	No Data	PO Number	No Data

Part Number	No Data	Product Line	No Data
Product Family	No Data	Product Description	No Data
Customer Part Number	No Data		

Quantity	No Data	Unit Price	No Data
Sales Amount *	No Data	Post Split Amount	No Data
Booking Cost	No Data	Real Cost	No Data
Commission Rate	No Data		

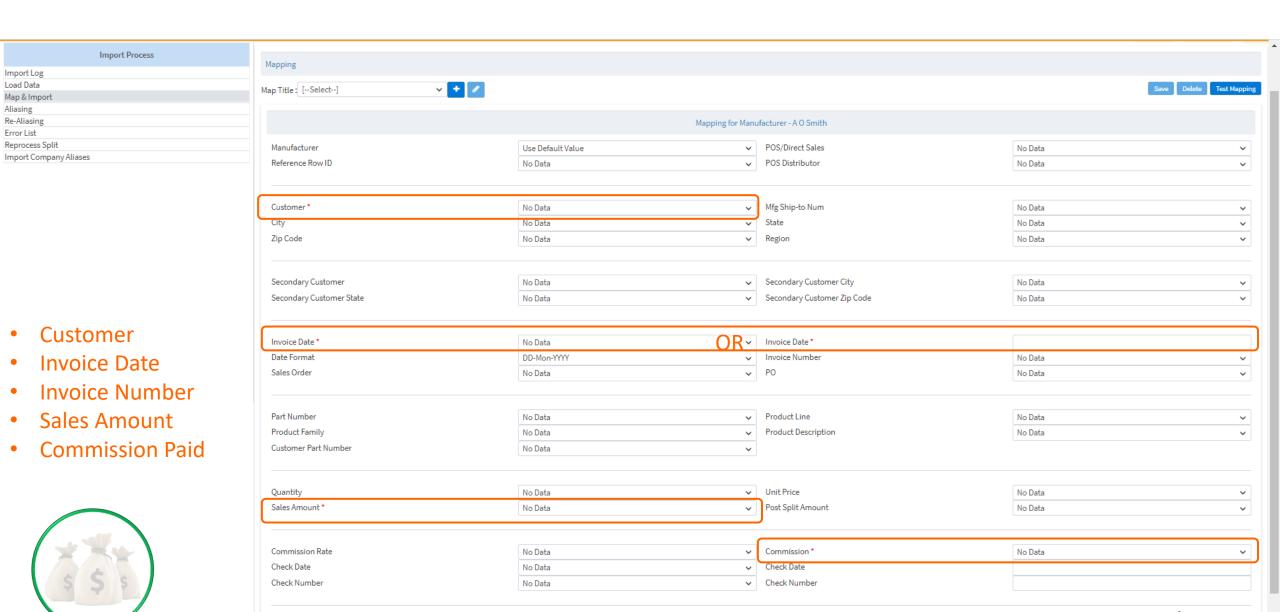|			
Comment	No Data		
Generate Invoice to Reconcile	☑	Commission Rate %	10

Import Sales Data

- **Customer**
- **Invoice Date (Planned Date)**
- **Invoice Number**
- **Sales Amount**
- **Generate Invoice/ Commission Rate**

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Commissions Import - required fields
Import to Reconcile Invoices

Import Process
Import Log
Load Data
Map & Import
Aliasing
Re-Aliasing
Error List
Reprocess Split
Import Company Aliases

Mapping

Map Title : [--Select--] ▼ [+] [✏]   [Save] [Delete] [Test Mapping]

Mapping for Manufacturer - A O Smith

| Manufacturer | Use Default Value ▼ | POS/Direct Sales | No Data ▼ |
| Reference Row ID | No Data ▼ | POS Distributor | No Data ▼ |

Customer *	No Data ▼	Mfg Ship-to Num	No Data ▼
City	No Data ▼	State	No Data ▼
Zip Code	No Data ▼	Region	No Data ▼

| Secondary Customer | No Data ▼ | Secondary Customer City | No Data ▼ |
| Secondary Customer State | No Data ▼ | Secondary Customer Zip Code | No Data ▼ |

Invoice Date *	No Data ▼	**OR**	Invoice Date *	▼
Date Format	DD-Mon-YYYY ▼	Invoice Number	No Data ▼
Sales Order	No Data ▼	PO	No Data ▼

Part Number	No Data ▼	Product Line	No Data ▼
Product Family	No Data ▼	Product Description	No Data ▼
Customer Part Number	No Data ▼		

| Quantity | No Data ▼ | Unit Price | No Data ▼ |
| Sales Amount * | No Data ▼ | Post Split Amount | No Data ▼ |

Commission Rate	No Data ▼	Commission *	No Data ▼
Check Date	No Data ▼	Check Date	
Check Number	No Data ▼	Check Number	

| Comment | No Data ▼ |

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- **Customer**
- **Invoice Date**
- **Invoice Number**
- **Sales Amount**
- **Commission Paid**

Sales & Commissions Import - required fields
Import to Match & Reconcile against Pos/Invoices
Or Import as sales & commission history

- Customer
- Invoice Date
- Sales Amount
- Commission Paid

It's a good idea to enter as much detail as you have on your excel sheet. **Invoice#** and **PO#** will help to auto-match and reconcile.

Mapping for Manufacturer - A O Smith				
Manufacturer	Use Default Value	POS/Direct Sales	No Data	
Reference Row ID	No Data	POS Distributor	No Data	
Customer *	No Data	Mfg Ship-to Num	No Data	
City	No Data	State	No Data	
Zip Code	No Data	Region	No Data	
Secondary Customer	No Data	Secondary Customer City	No Data	
Secondary Customer State	No Data	Secondary Customer Zip Code	No Data	
Invoice Date *	No Data	OR Invoice Date *		
Date Format	DD-Mon-YYYY	Invoice Number	No Data	
Sales Order	No Data	PO Number	No Data	
Part Number	No Data	Product Line	No Data	
Product Family	No Data	Product Description	No Data	
Customer Part Number	No Data			
Quantity	No Data	Unit Price	No Data	
Sales Amount *	No Data	Post Split Amount	No Data	
Booking Cost	No Data	Real Cost	No Data	
Commission Rate	No Data	Commission *	No Data	
Check Date	No Data	Check Date		
Check Number	No Data	Check Number		
Comment	No Data			
		Commission Rate %		

Import Sales & Commission Data

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