

Import mapping

1

Bookings import - required fields

Import as POs

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

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

Mapping for Manufacturer - Avituiz

Manufacturer	Use Default Value	POS/Direct Sales	No Data
Reference Row ID	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
Planned ship Date	No Data	Planned ship Date	
Date Format	DD-Mon-YYYY		
Sales Order	No Data	PO Number	No Data
Quote Number	No Data	PO Date *	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
Projected Revenue *	No Data	Post Split Amount	No Data
Comment	No Data		
Generate Purchase Order to Reconcile	<input checked="" type="checkbox"/>	Commission Rate %	10 2

- 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
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		
Comment	No Data		
Generate Invoice to Reconcile	<input checked="" type="checkbox"/>	Commission Rate %	10

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



Import Sales Data

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	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		

- 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**

Re-aliasing
Re-aliasing
Error List
Reprocess Split
Import Company Aliases

- 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 %	

