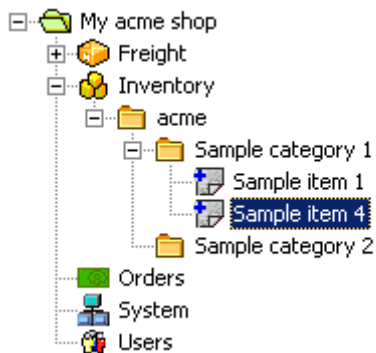


5. Data Entry

Entering Inventory

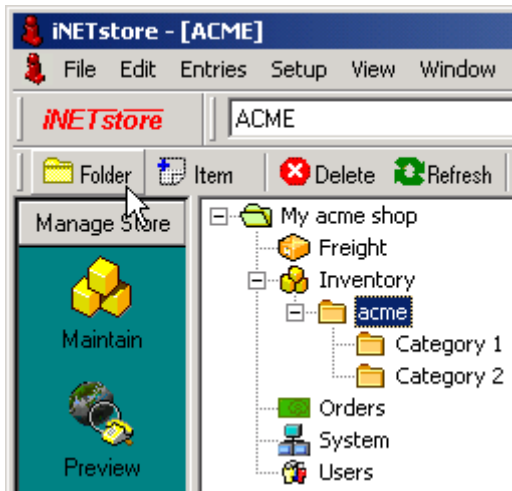
Entering Inventory Through iNETstore Maintenance

To enter products into the database, double-click on the inventory icon in the left hand pane. The top-level category of your store will then appear below it. Double click on this to view your main product categories. To make it easier for customers to browse your online store it is best to group your products into categories.



Double click on one of the Sample Categories. The details of the Category will appear in the preview pane, while the items that belong to that category are displayed below it in the navigation pane. Double clicking on items in the navigation pane will cause item details to be displayed in the preview pane.

Adding A Category Through iNETstore Maintenance



To add a new category, click on the 'Folder' button in iNETstore Maintenance. You will then be prompted to enter the category name and select the parent category from a drop-down list.

After you have done that and click on the ok button, the newly created category will be opened in the preview pane, where you can enter further details. See chapter 16 for a list of available fields and their meanings.

After you have finished entering data, you will need to click on the 'Update' button to save your changes.



Adding A Category Through BBMS

1. Log in to BBMS
2. Click on 'Items' under 'Inventory' in the menu bar.
3. You will see these options:



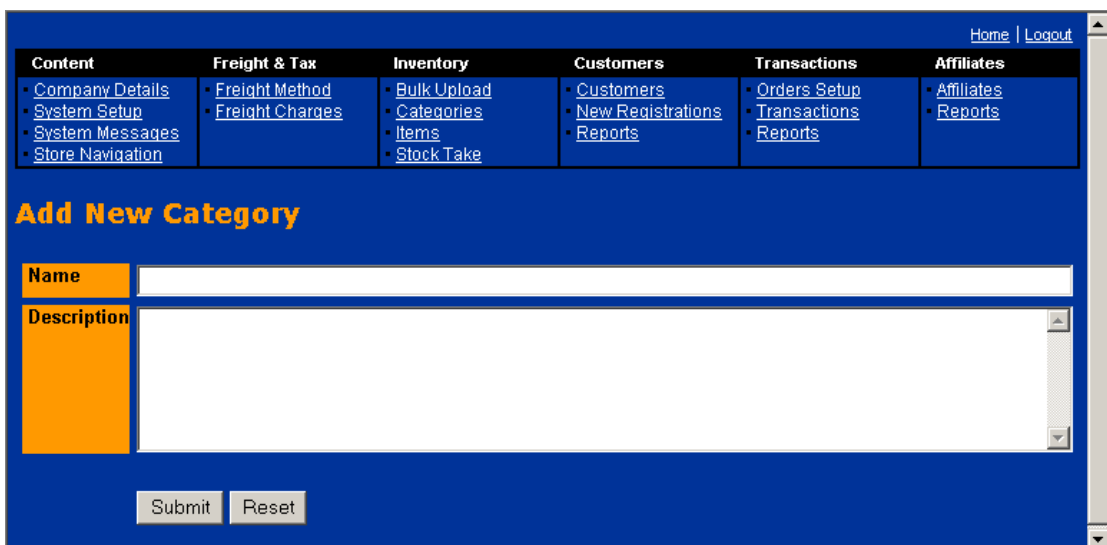
The screenshot shows a blue header with the title "Categories" in orange. Below the title are two buttons: "Add New Category" and "Edit Existing Category".

4. Click on 'Add New Category' and select a category from the DHTML menu:



The screenshot shows a blue header with the title "Add New Category" in orange. Below the title is a dropdown menu with "Acme Corp" selected.

5. Enter category details and then click on the 'Submit' button to save the changes you have made in the database.



The screenshot shows a blue header with a navigation menu. The menu has six columns: Content, Freight & Tax, Inventory, Customers, Transactions, and Affiliates. Each column contains a list of links. Below the menu is the "Add New Category" form. The form has two input fields: "Name" and "Description". At the bottom of the form are two buttons: "Submit" and "Reset".

Content	Freight & Tax	Inventory	Customers	Transactions	Affiliates
<ul style="list-style-type: none">Company DetailsSystem SetupSystem MessagesStore Navigation	<ul style="list-style-type: none">Freight MethodFreight Charges	<ul style="list-style-type: none">Bulk UploadCategoriesItemsStock Take	<ul style="list-style-type: none">CustomersNew RegistrationsReports	<ul style="list-style-type: none">Orders SetupTransactionsReports	<ul style="list-style-type: none">AffiliatesReports

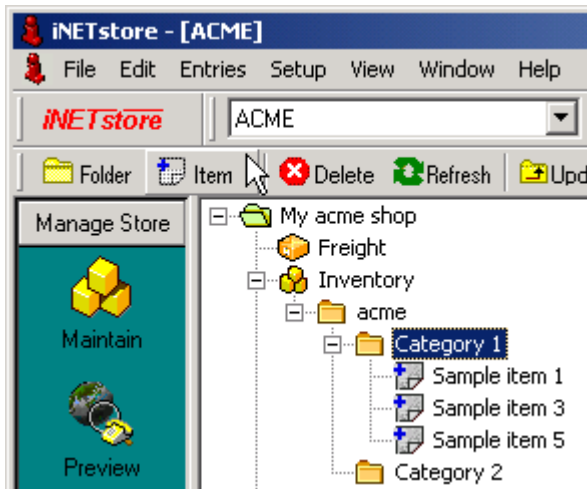
Add New Category

Name:

Description:

Submit Reset

Adding An Item Through iNETstore Maintenance



To add a new item, select the parent category of the item by drilling down through the category tree. Then select the parent category and click the 'Item' button in the toolbar. You will then be prompted to enter a name for the item. Enter a name and click the OK button.

A newly created item will be opened in the preview pane, where you can enter further details. See chapter 16 for a list of available fields and their meanings.

After you have finished entering data, you will need to click on the 'Update' button to save your changes.



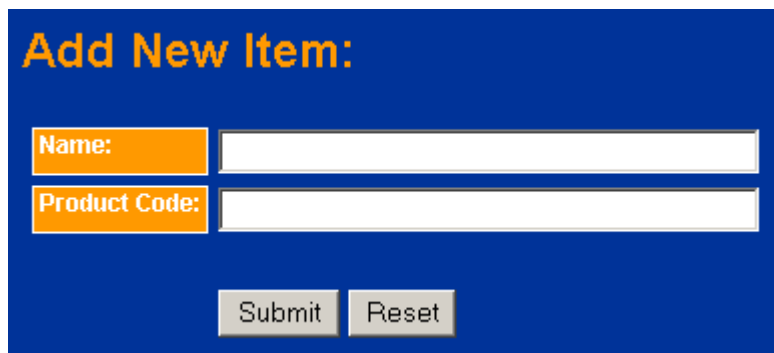
Adding An Item Through BBMS

1. Log into BBMS.
2. Click on 'Items' under 'Inventory' in the menu bar.
3. Click on 'Add New Item'. You will see a DHTML pull-down menu from which you can select a category:



The screenshot shows a blue header with the text "Add New Item" in orange. Below the header, there is a text prompt: "Select the category you want to add an item." Underneath this prompt is a dropdown menu with "Acme Corp" selected and displayed in a blue box.

4. Select the category to which the new item is to be assigned.



The screenshot shows the "Add New Item:" form on a blue background. It features two input fields: "Name:" and "Product Code:", each with a white text box. Below the input fields are two buttons: "Submit" and "Reset".

5. Enter the name and product code of the item. Then click on 'Submit'. The screen with the categories DHTML menu will now appear again so that you can add another item.

Note:

In order to enter more product options, go to Inventory | Items. Click on 'Edit Existing Item' and search for the item you wish to edit.

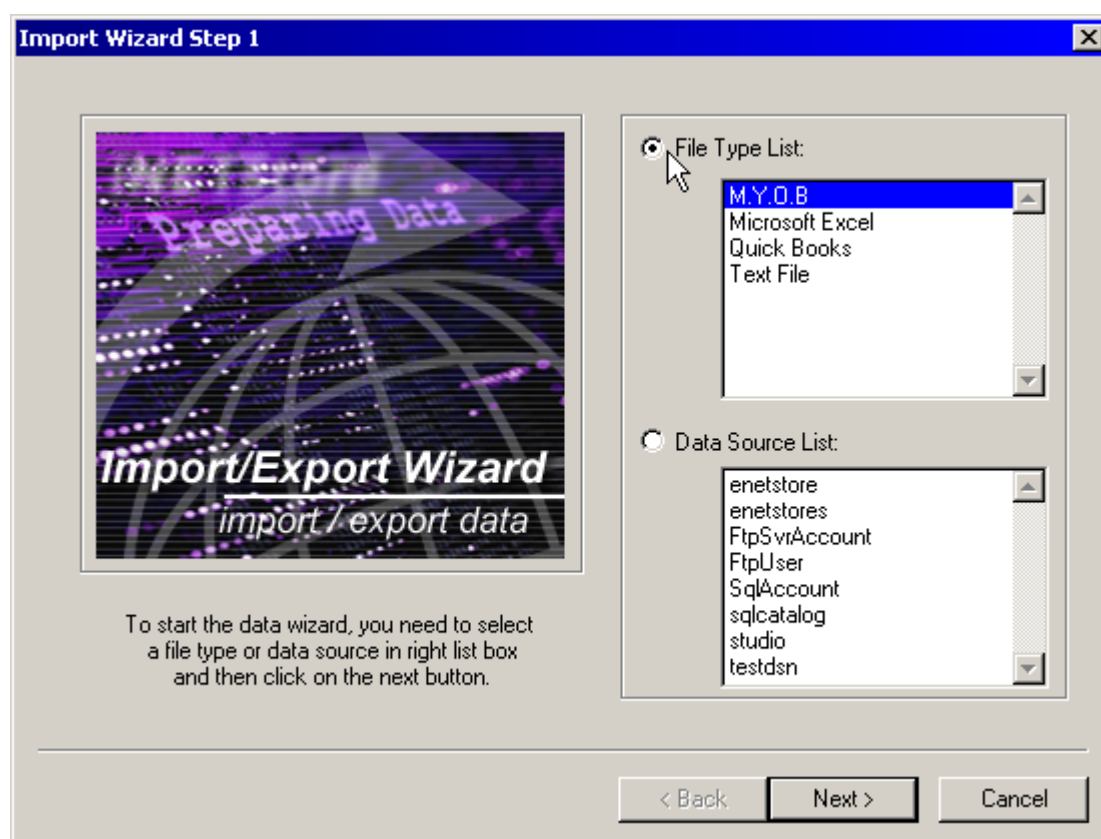
Import / Export Wizard

The import / export wizard is based on ODBC (Open Database Connectivity) technology. These wizards will assist you to import data from and export data to data sources, such as:

- Accounting software, e.g. M.Y.O.B. and Quicken
- Microsoft Excel (CSV) files
- Text files
- ODBC data sources (e.g. Microsoft Access, Microsoft SQL Server, Oracle)

Import Wizard

When you start the import wizard, the following screen is shown:



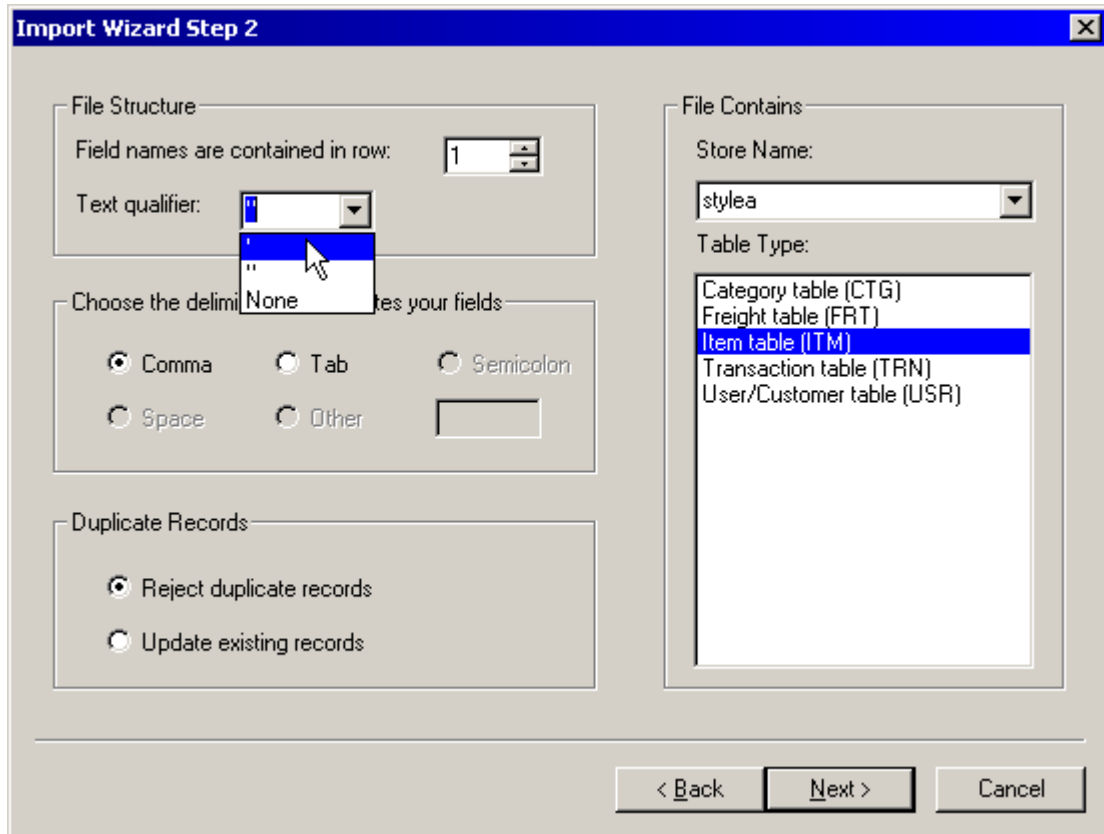
Using your mouse, you can select a file type in File Type List box or select a data source from Data Source List box by clicking its name.

1. Once you select a file type, for example M.Y.O.B, you will only import data from that type of file. You may get corrupted data if you try to import a file that is of a different type.
2. If you select a data source name, you will import data from the one of the ODBC data sources configured on your machine.

Importing Data From A File

The following instructions relate to importing data from one of the supported file formats.

After you select a file type and click the Next button. The following window appears:



During this step, you will specify some settings. The wizard will use them during the data import process.

Field names are contained in row:

Line number of the line in which field names (header record) are contained.

Text qualifier:

Select the text qualifier. For example, CSV files normally use double-quotes (") as a qualifier. Other CSV files may have no text qualifier at all, in which case specify "None".

Delimiter:

A Delimiter is a character that is used to delimit records. This is normally a comma or tab.

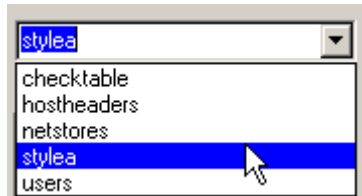
Duplicate Records:

You can select what the data import wizard does when duplicate records are found. By default, all duplicate records are rejected.

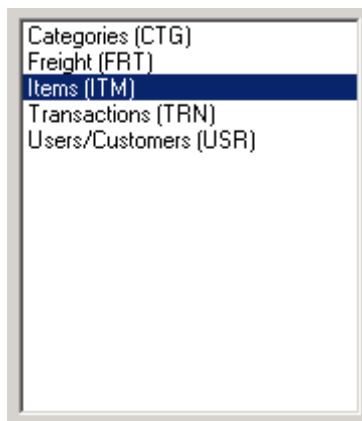
File Contains:

Now you have to specify the store and table where you would like to import your file.

Store Name contains a list of store names; you can click on the drop down list box and select the store name that you would like to import your file to.

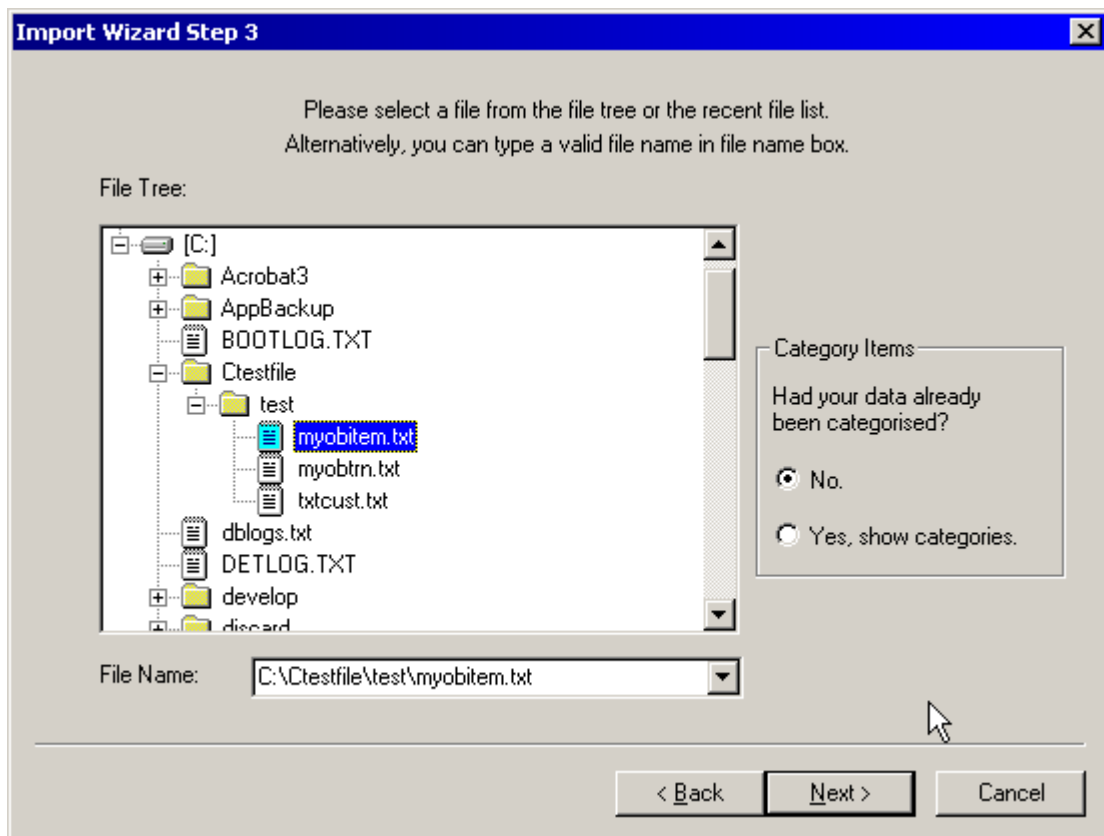


After you select a store name, you will have to nominate the table belonging to that store where the data will be imported.



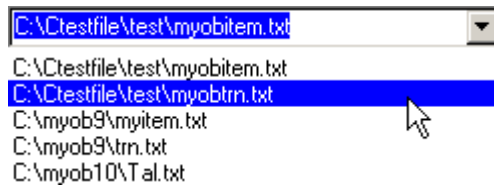
When you are happy with the file type that you are importing and have nominated the table that you will be importing the data to, click the Next button.

After you have selected the Next button, the following screen is shown:



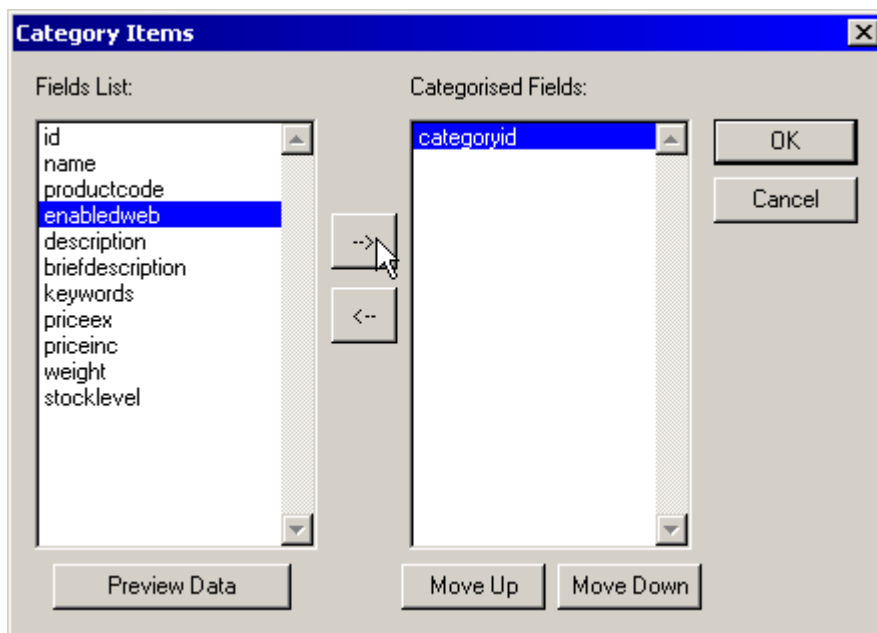
In the File Tree window, you can double click on a drive letter or a folder to expand it. After you find a file that you need to import from, click on the file name to select it.

Alternatively, you can select a file name from the file name drop down list box or type a file name in the list box.



If you intend to import data to the item table (ITMstorename) of your store, you have an option to distinguish categorised items before you click Next button to go to step 4.

If you click the “Yes, show category” option, the Category Items window will be displayed:

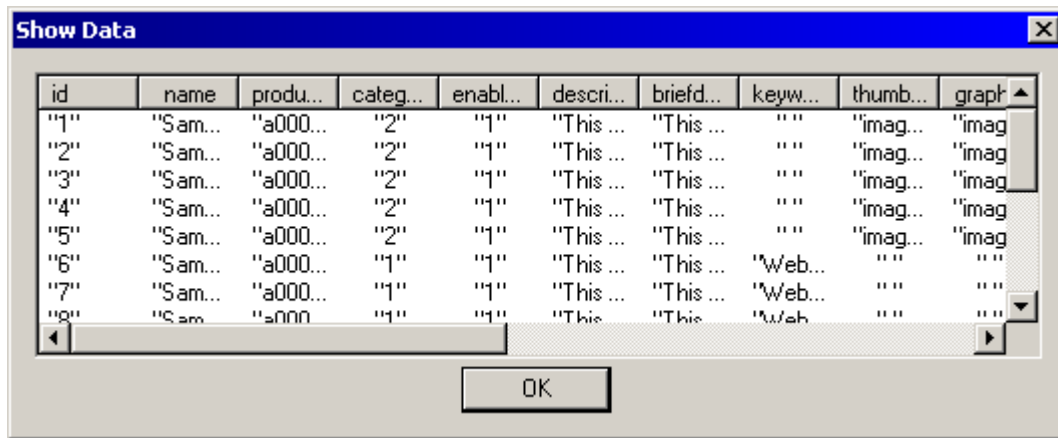


This window allows you to categorise items. For example, you might want to categorise your items by department. In this case, you would select a field called ‘department’ from your original database and move it to Categorised Fields. You might want to further categorise the items by the aisle in which they are located (imagine a real supermarket). In this case, select ‘isle’ from the original database and click on the arrow pointing to the right. As ‘isle’ is a sub category of ‘department’ it should now appear below ‘department’ in the Categorised Fields list. You can nominate as many sub categories as you like using this method.

To remove an item from the Categorised Fields list, just double-click on it.

If your data had been categorised to several levels, using Move Up or Move Down button to move a categorised field. The top field should be the top level category; the second field should be second level category and so on.

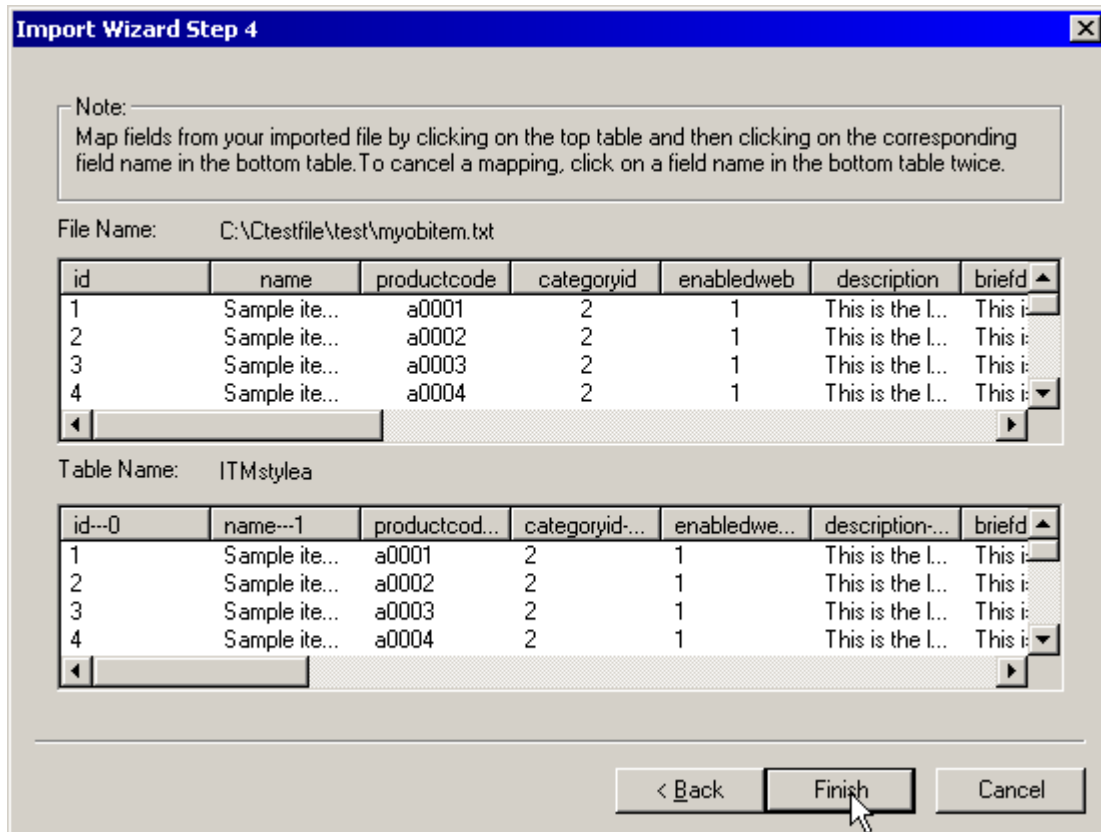
The Preview Data button can be used to open up a data preview window, as shown below. You can use this to preview the contents of your database before committing to import it.



If you do not specify a field(s) that represents your categories, the wizard will automatically select the No categories option and all items will be given a default category value.

Expert users can assign the default category value by modifying the ini file setting (explained later in this chapter).

The following window shows the Import Wizard Step 4.



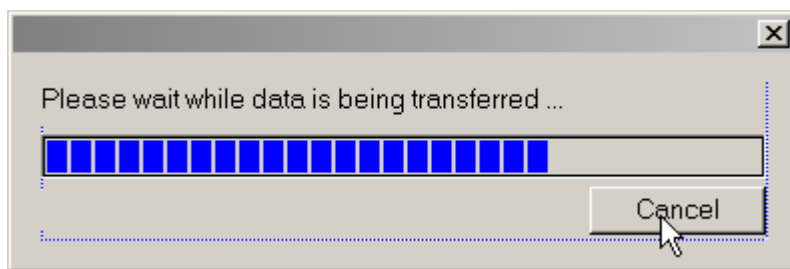
In this window, the imported file data is shown in the upper table. This can be mapped to the store database that is shown in the lower table.

Map a data column by clicking a column name in the upper table and then clicking a column name in the lower table. The column data in the lower table will be changed.

You need to click twice (not double click) on a column name in the lower table to cancel a mapping. This prevents data from importing to the field and leaving the field blank.

After you finish, click Finish button to complete the import wizard.

The following progress window will be displayed during the import process.



Upon completion, you will get a summary message:

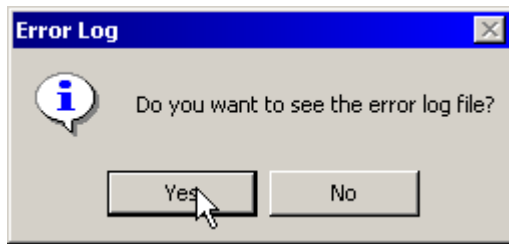


Sometimes, not all records are imported successfully. This may happen, for example, where duplicate records are rejected, where the import file has been corrupted, or where the data types of the import file and store database do not match.

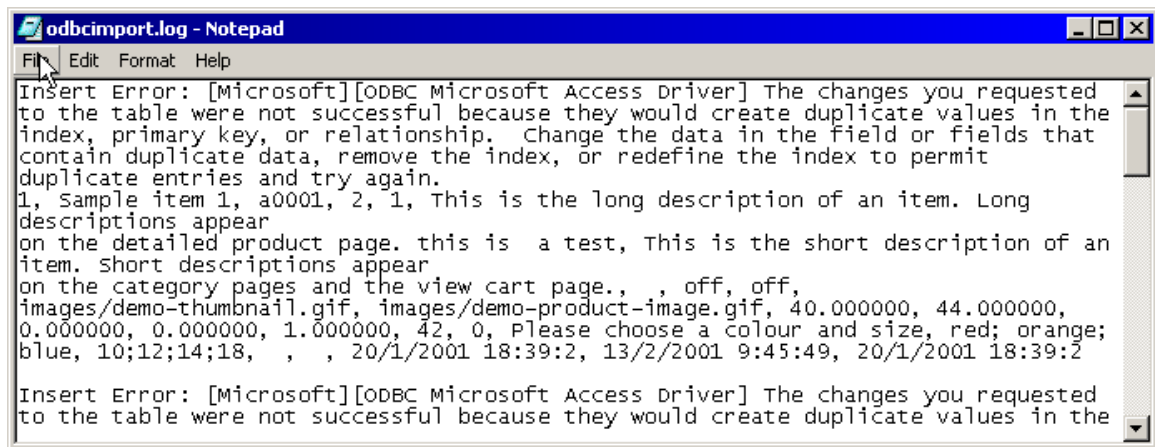
When this occurs, the message will show the number of records that were not correctly imported:



After you click the OK button, the following window will pop up:



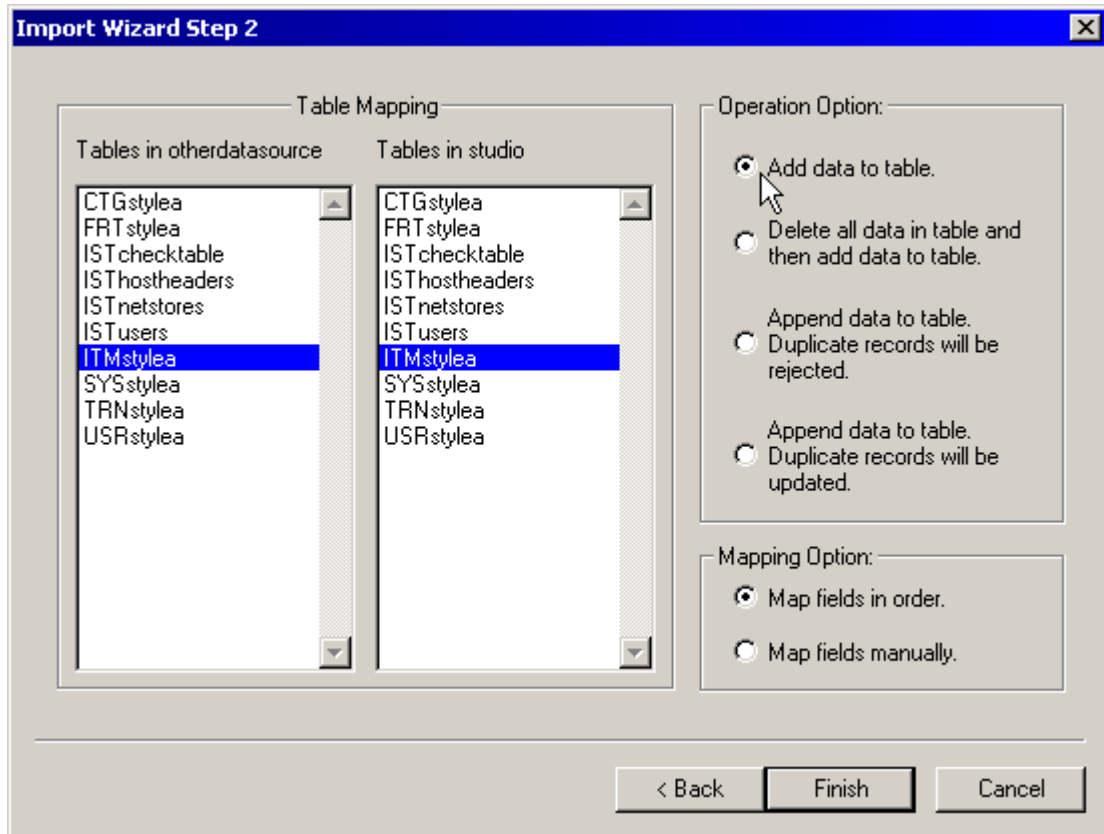
If you click Yes, a detailed log file will be shown. The file contains information about problems that may have occurred when importing data. For example, if some records have not been imported, you will see the reasons. A screen shot of a sample log file is shown below:



Importing From A Data Source

This section explains the process of importing from an external ODBC data source, such as Microsoft Access, SQL Server or Oracle. Data sources must be configured in ODBC before they can be imported. See the instructions for your data source if you are unsure how to configure this.

After selecting the data source to be imported in Import Wizard Step 1, click the Next button. The following screen is shown:



The list box on the left hand side contains the tables within the data source that you are importing. The list box on the right hand side contains all of the tables within your iNETstore Studio data source.

Nominate a table that you would like to import by clicking it in the list box on the left hand side. Select the corresponding table within the iNETstore data source on the right hand side.

It is important to understand the function of each of the tables within the iNETstore data source. Each table has the naming convention “XYZstorename”. “XYZ” is a three-letter code that represents the function of the table. For example:

CTG – categories
FRT – freight
ITM – items

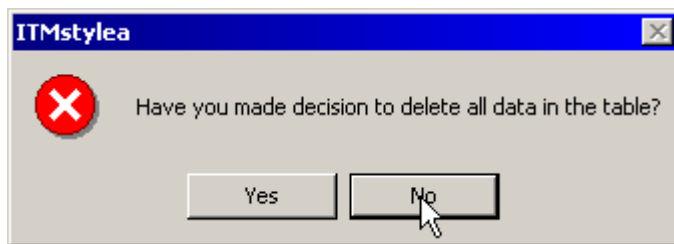
SYS – system and company information
TRN – transactions
USR – users

“storename” is the name of the store that you are importing to.

There are four options to import data to your store data source.

1. Add data to table. If this option is selected, a new table is created, into which all imported data is stored.
2. Delete all data in a table. This option erases all existing data in the table in your store database and replaces it with the data from the import file.
3. Append data to table (reject duplicate records). This option leaves existing data in the table intact and appends data from the import file. Duplicate records will be rejected.
4. Append data to table (update duplicate records). This option can be used to append data from an import file to a table. Existing data in the target table will be left intact, with the exception of duplicate records, which will be updated.

If you select the second option, the following message would be popped up when you click Finish button.

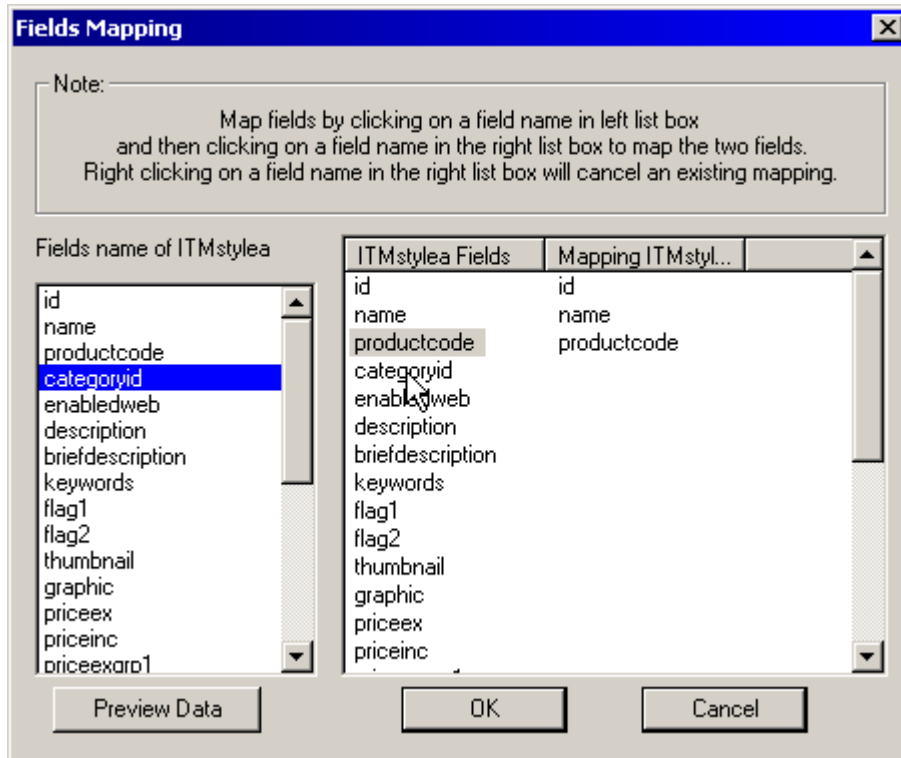


It just warns you that you are going to erase all data in the relevant table in your store database. If you click on the Yes button, your data will be lost forever and cannot be recovered. The following message will be shown. Click OK to continue.



By default, fields are mapped from the table to be imported to the new table by the order in which they appear. However, you can change map fields manually by selecting the manual mapping option.

The screen shown below illustrates manual mapping.



To modify mappings, select a field name in the left list box by clicking on it and then click on a field name in the first column of the right list box. The two fields will be mapped.

To cancel a mapping, right-click on a field name in the first column of list box on the right hand side. The mapped field in second column will disappear.

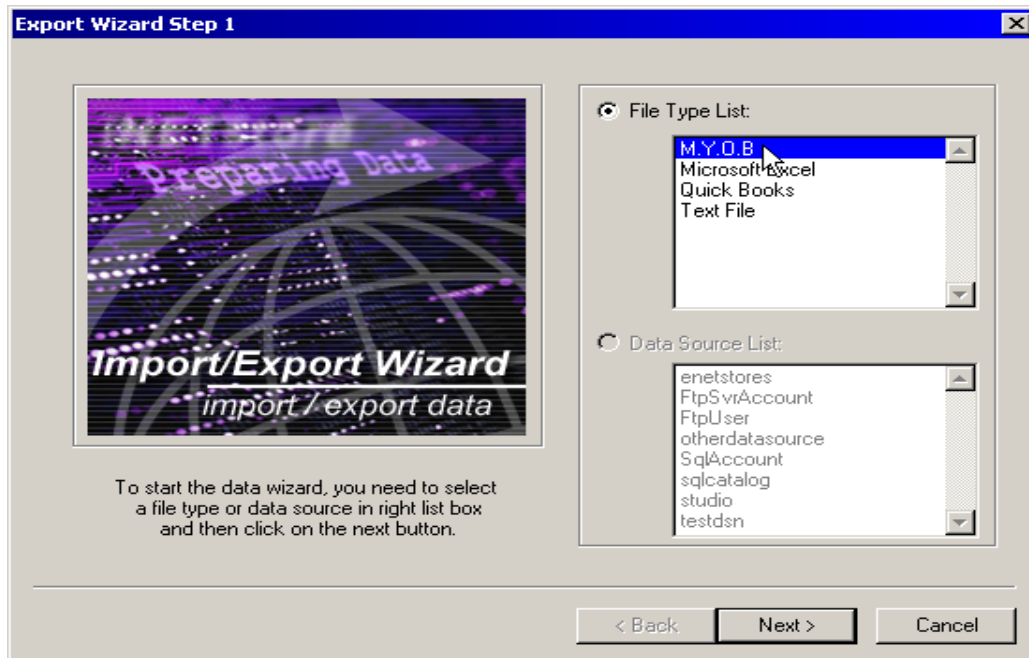
When finished, click OK to confirm your mapping. Alternatively, click Cancel to abort the mapping.

After you finish mapping, only selected fields are imported into your store database.

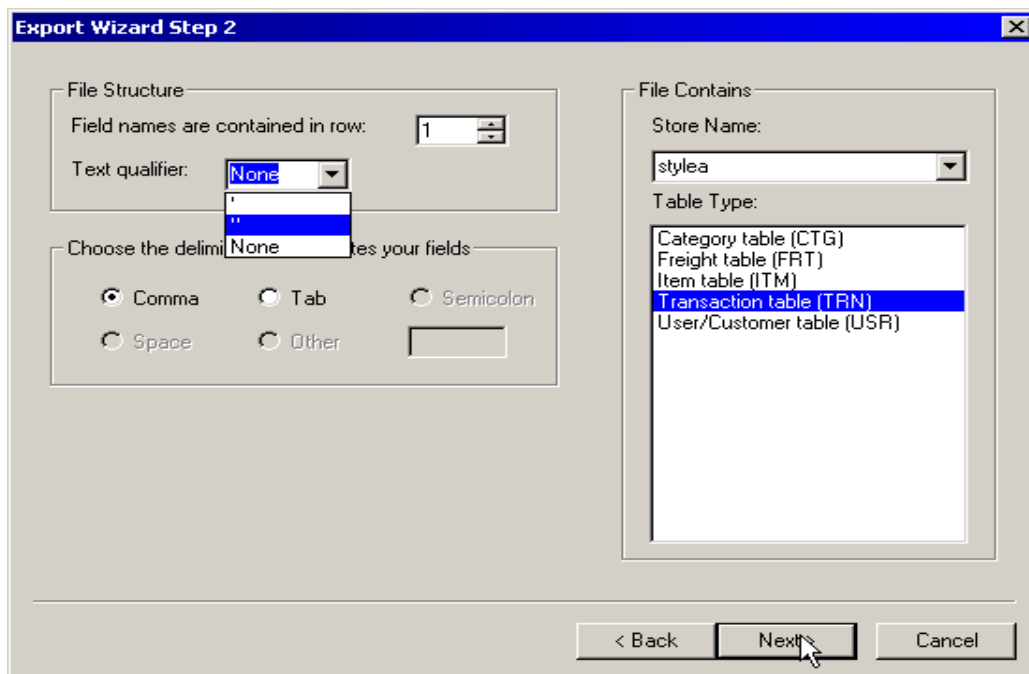
The import process will begin and the success of the import will be displayed. An error log can be displayed if necessary to trouble shoot any related importing problems.

Export Wizard

The Export Wizard enables you to export data from your store to a text file, Microsoft Excel (CSV) file and some accounting software (such as M.Y.O.B or QuickBooks) file formats.



If you select a file type and click Next button, the following window is shown.

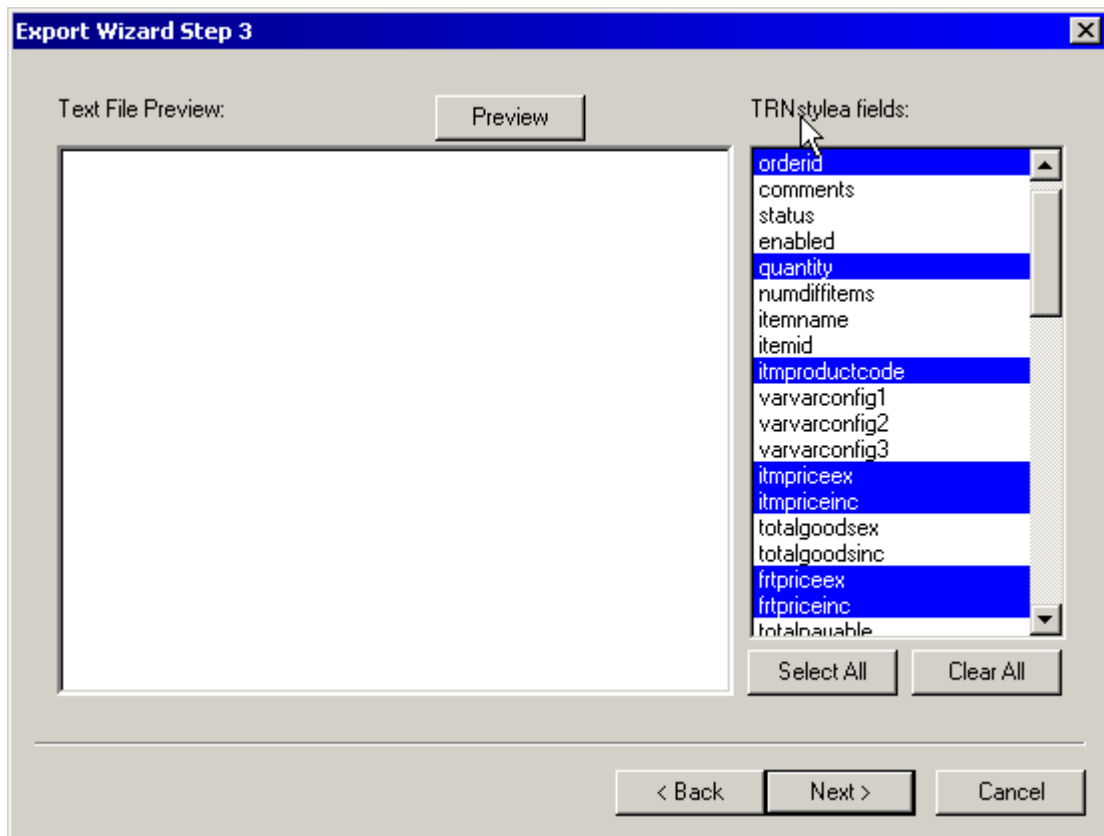


The window is the same as the window you have seen in the Import Wizard. It allows you to select a store name, table name and file import preferences (see import wizard for more information).

Note that QuickBooks files are quite different than other files. For this reason, import from QuickBooks will be described in a separate sub-chapter.

Export Your Store Data To M.Y.O.B, Microsoft Excel Or Text File

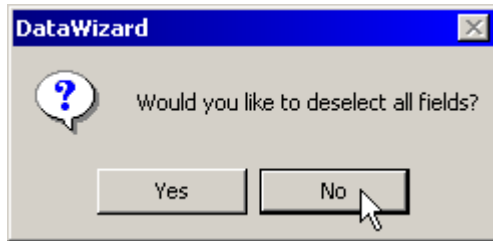
If you selected a file type other than QuickBooks in Export Wizard Step 1, the following window is shown.



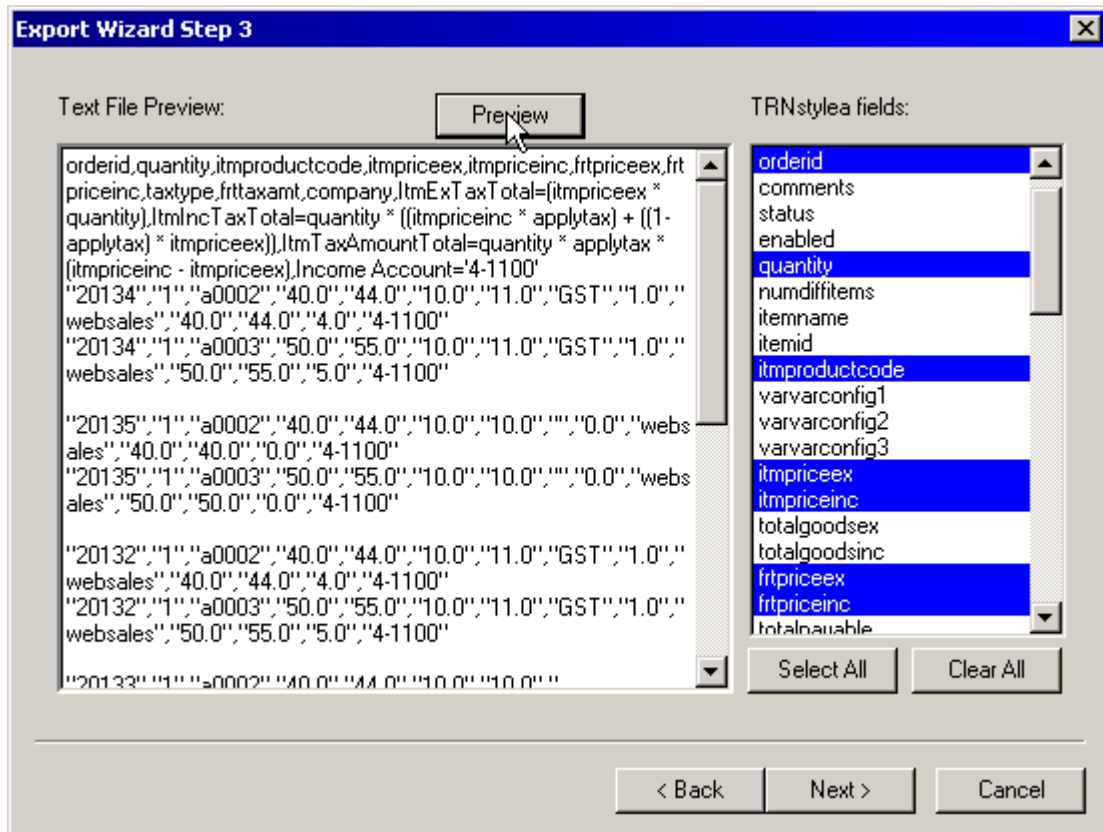
In the window above, the name of the relevant table is shown at the mouse pointer position. In the list box below, all fields contained in the table are shown. Note that some fields are selected by default. Expert users can change the default settings by modifying the import/export wizard ini file (explained in more detail later in this chapter).

If you wish to select all fields, you can click on Select All. Field selection can be toggled on and off by clicking on a field.

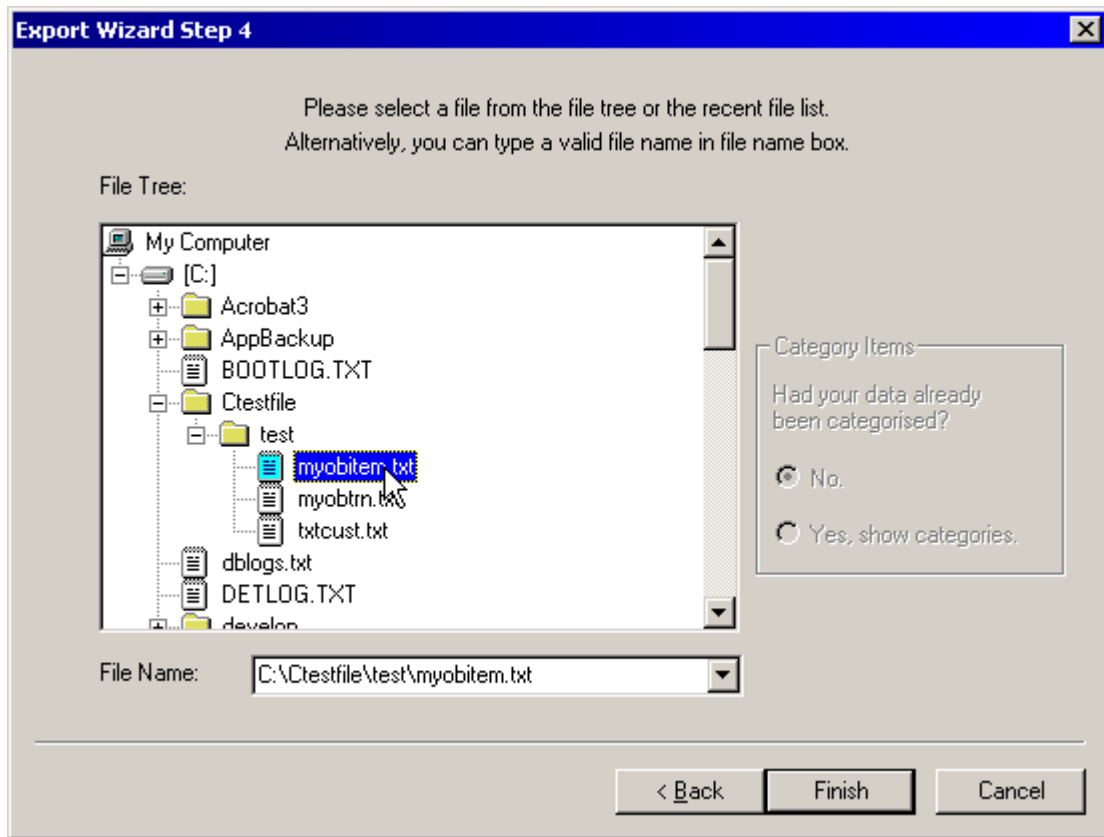
To deselect all fields by pressing Clear All button. The following message may be given to confirm your operation.



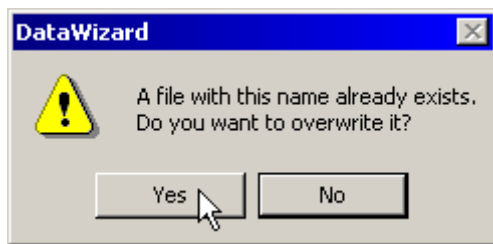
If you want to view the data contained in the table, you can press the Preview button. The data in the fields that have been selected will be displayed in the left window.



After clicking the Next button, Export Wizard Step 4 window is shown as following:

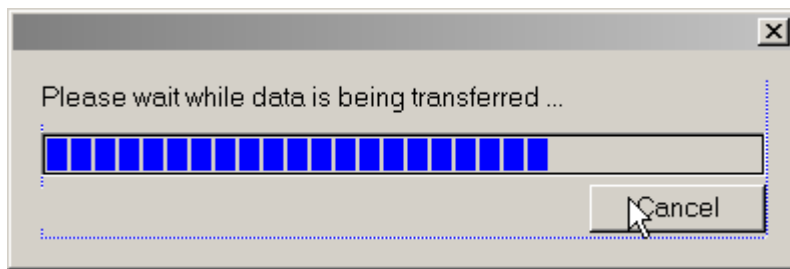


During this step, you either select a file to be exported or type a new file name in the drop down list box. If you select an existing file, the follow message is given after you click Finish button.



If you click on the Yes button, the file is overwritten and the exporting process carries on. If you click on the No button, the exporting process is stopped and you can enter a new file name or select another file name to be exported.

While data is being exported, the following progress window is shown.

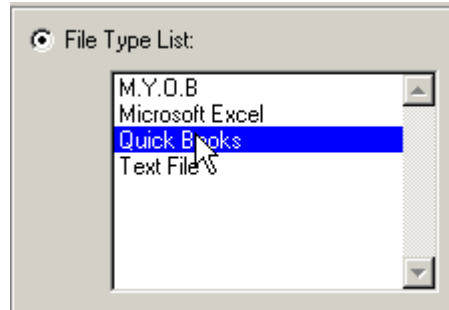


After completion, a status message is shown. You will need to click on the OK button to end the exporting process.



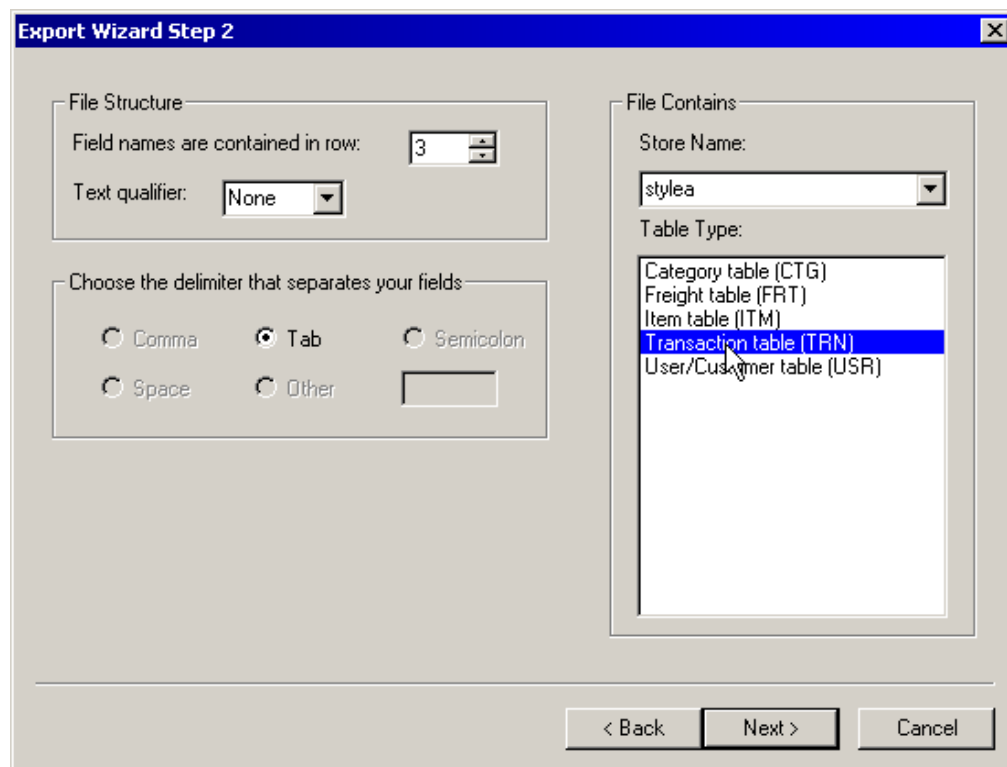
Export Your Store Data To QuickBooks

The process of exporting to QuickBooks is different than exporting to other file types. The process that is described below only applies if you select QuickBooks from the File Type List during step 1.

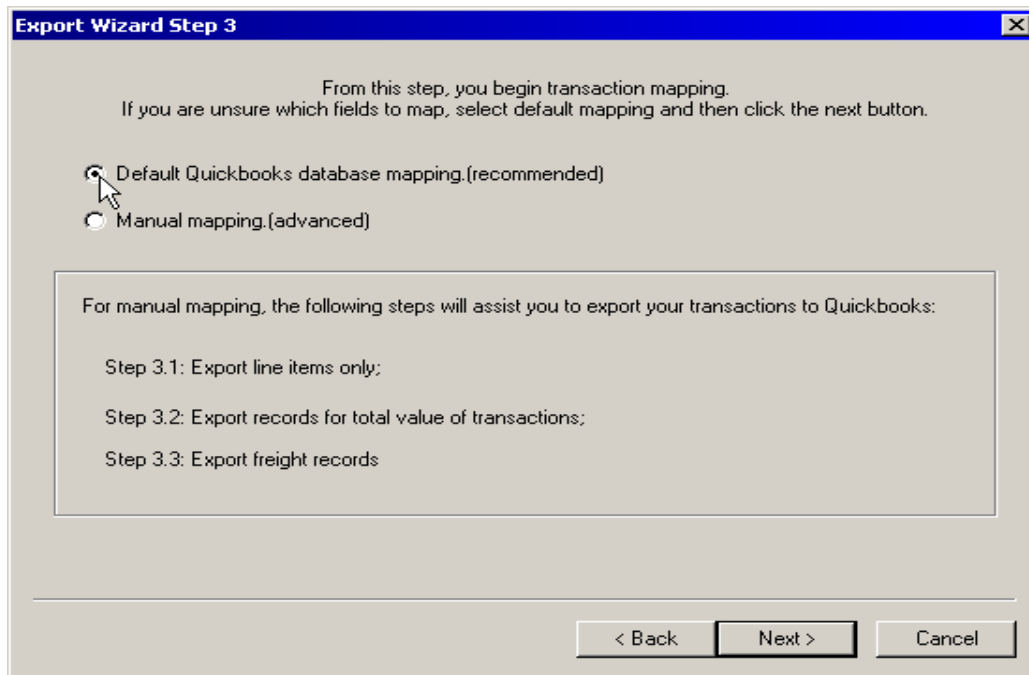


Export Transaction Data to QuickBooks

To export transaction data to QuickBooks, you should select the Transaction Table of your store, as shown below.



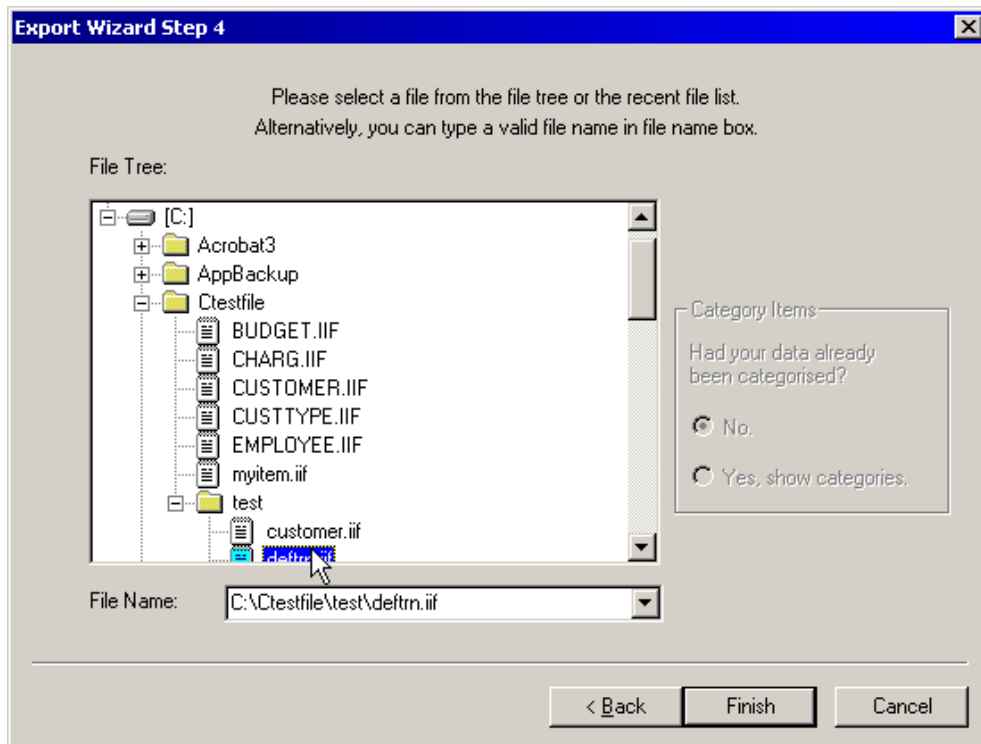
After you click Next button, the following window is displayed.



At this step, you have two options.

- Use default settings to export your database (this option is highly recommended);
- Use manual mapping.

It is recommended that you do not modify the default settings. If you use default settings, you can continue the export process as explained in the previous sub-chapter.

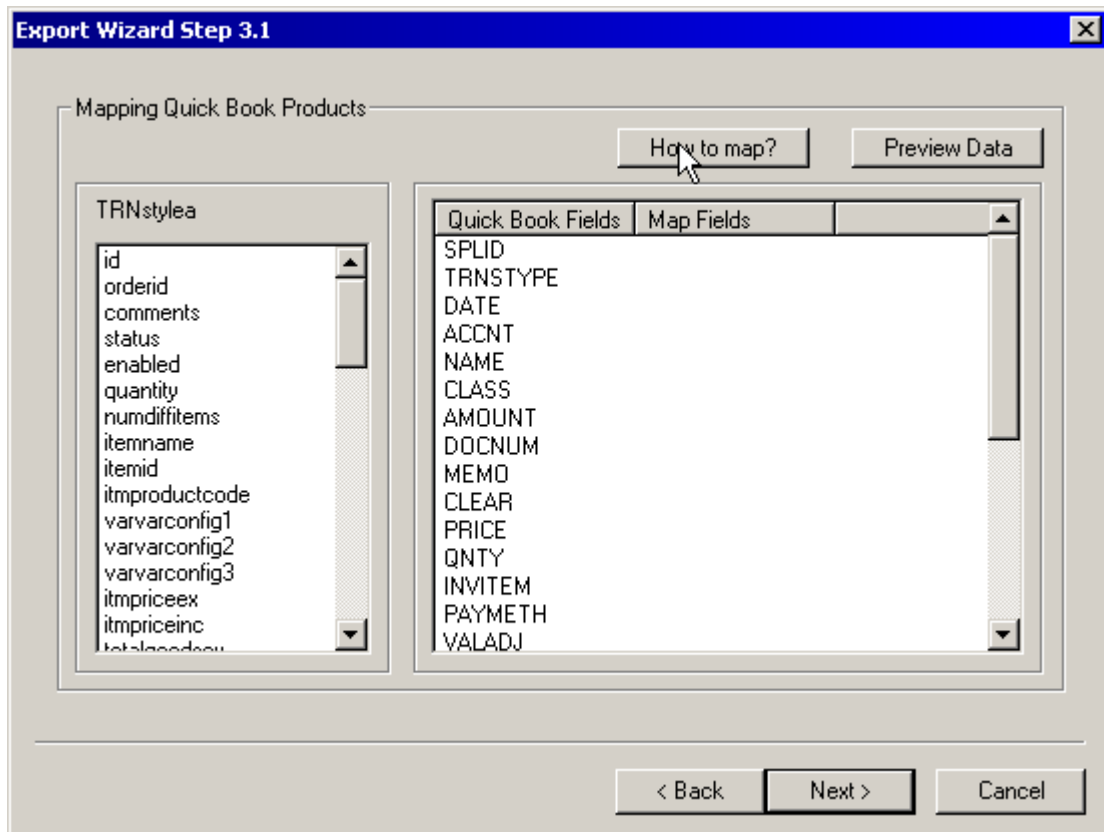


If you select manual mapping, the following window is shown.

Exporting data manually to Quickbooks is a three step process of selecting the fields that represent each of the following records:

1. Line items sold
2. Total value of transaction
3. Freight value

The first step is to select the fields that represent the line items sold:



All fields name in your store transaction table are listed in the left list box, and all fields name in Quick Books database are listed in the first column of the right list box.

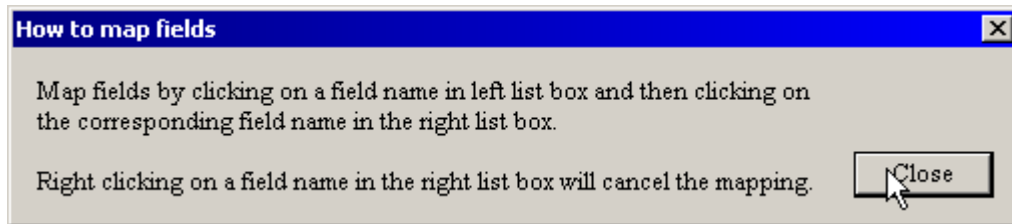
You can press Preview Data button to view the data in your store database. The preview data window is shown as following:

Window title: Show Data

id	orderid	comments	entrytype	status
1	20134		0	NEW
2	20134		1	NEW
3	20134		1	NEW
7	20135		0	NEW
5	20135		1	NEW
8	20132		1	NEW
9	20132		1	NEW
10	20132		0	NEW

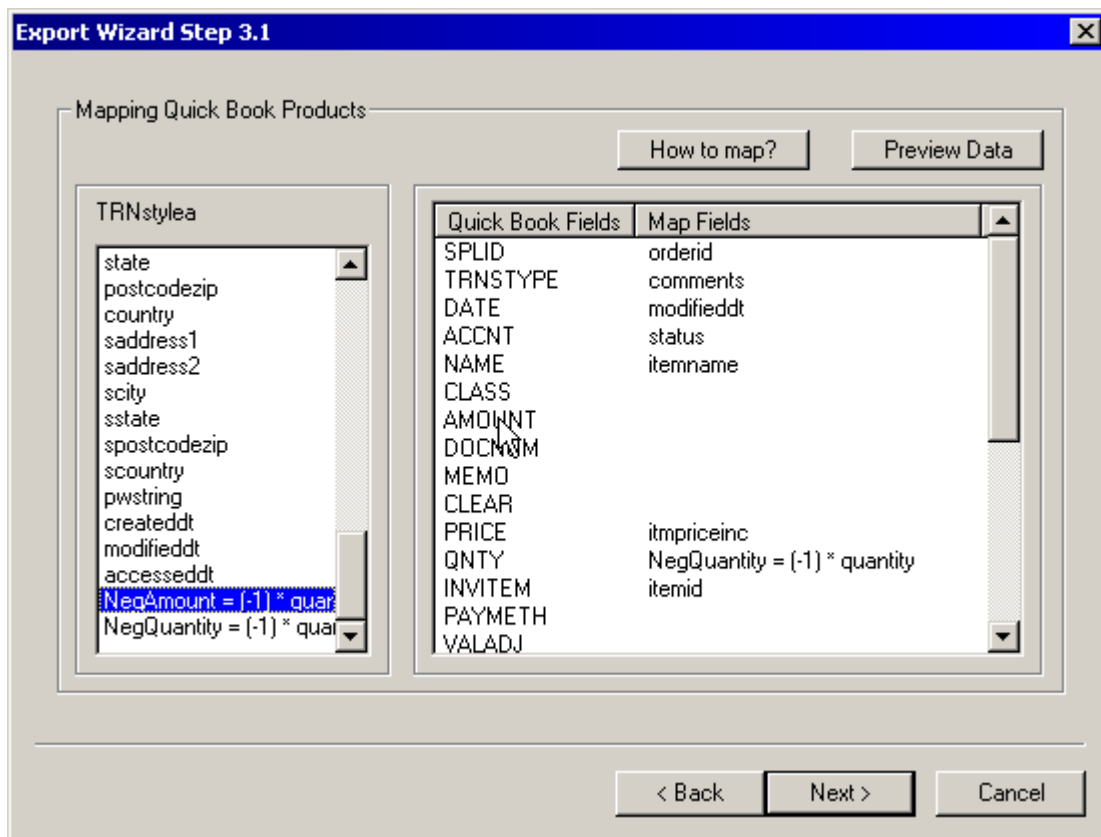
OK

A mapping instruction window is displayed when you press the “How to map?” button.



You can map two fields by first clicking on a field on the left and then on the corresponding field in the right list box.

After you have made a few mappings, the window should look similar to the one shown below.

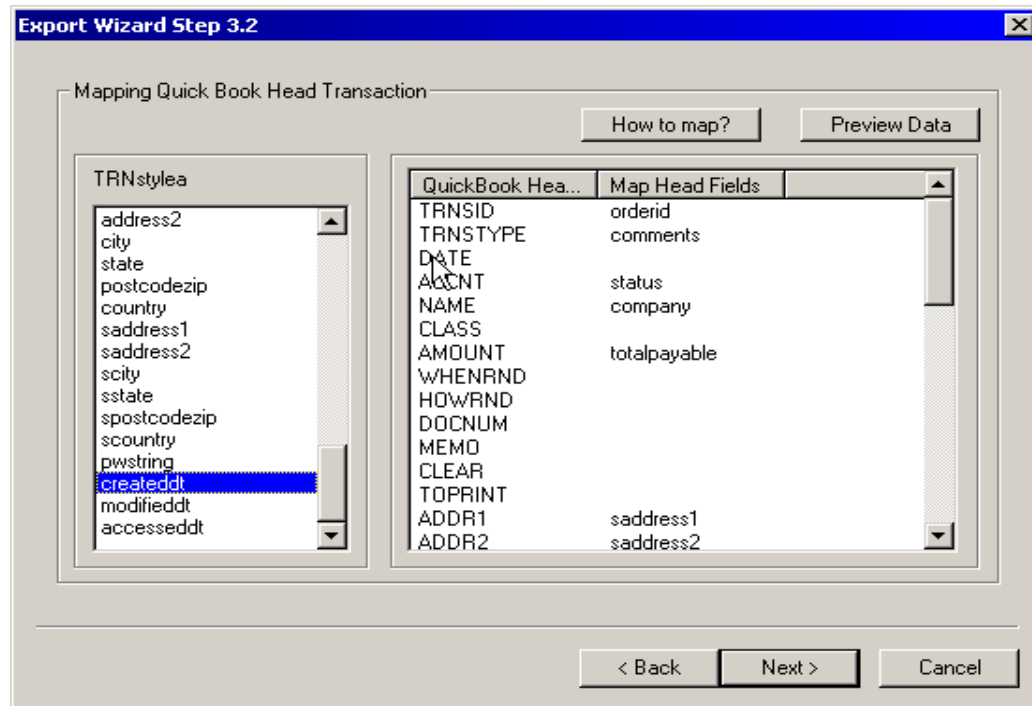


After finishing field mappings, click the Next button. You may see a message box as follows:

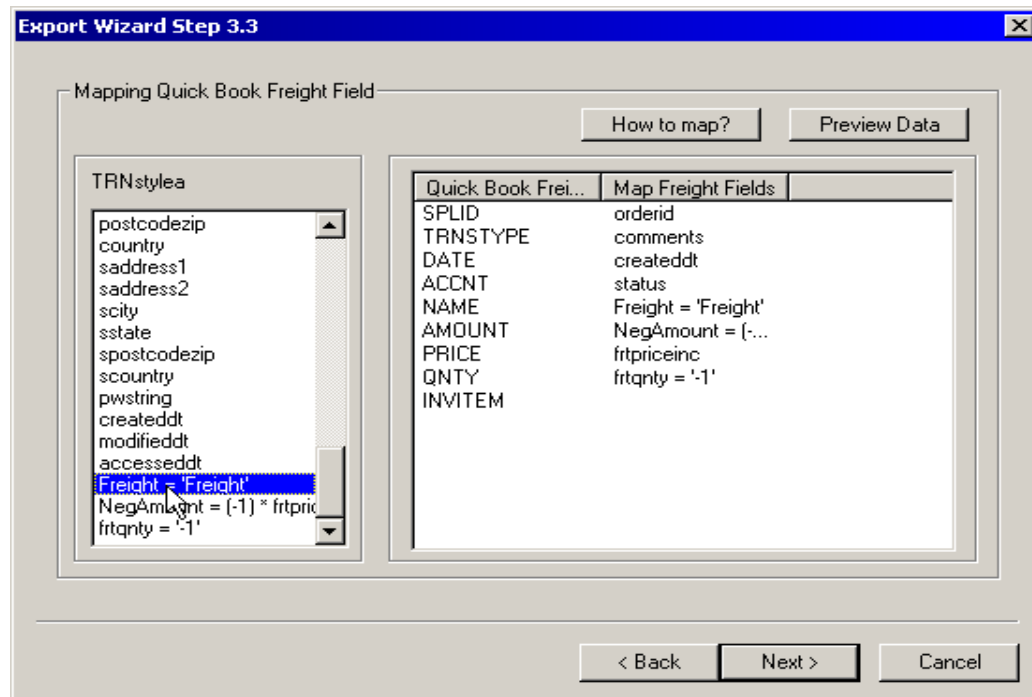


This happens to make you aware of fields that are required by the QuickBooks database, that have not been mapped. As a result, you may not be able to import the file into QuickBooks.

Next you need to map the QuickBooks Head Transactions, i.e. the total value of the transaction.



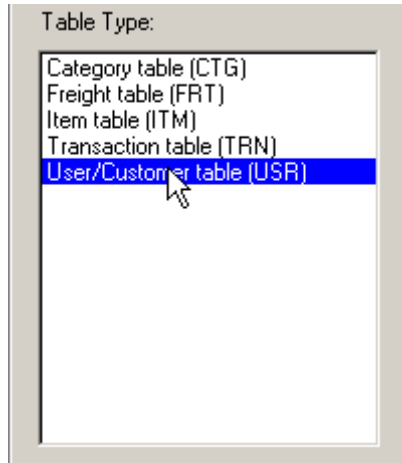
Finally you'll need to map the fields relating the freight value of the transaction:



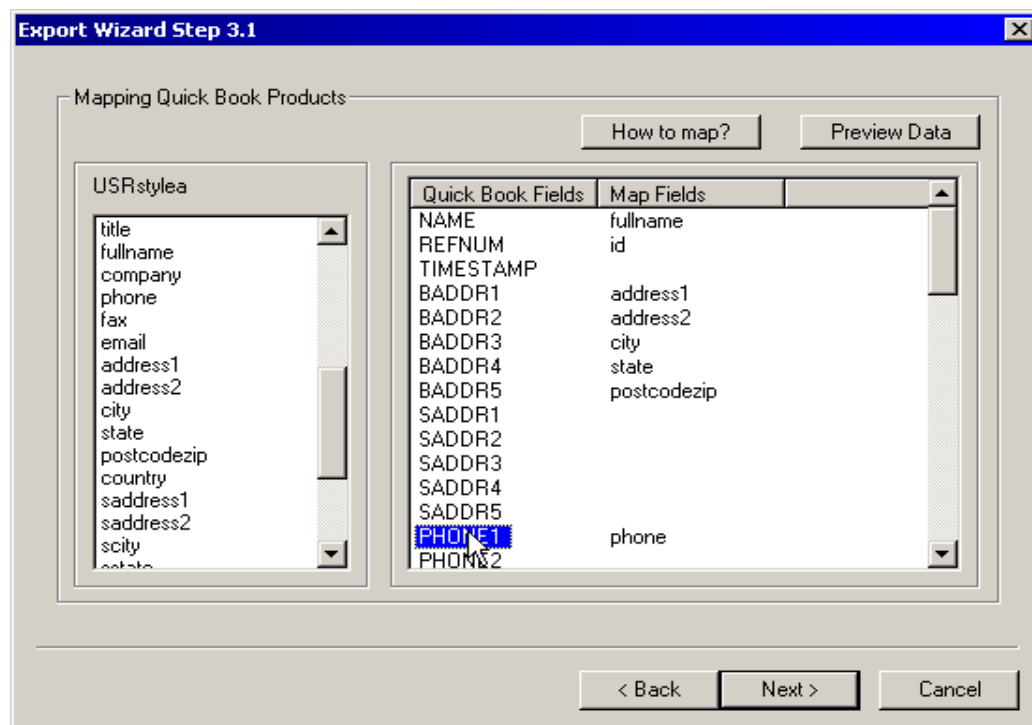
After you finish these three sub-steps, click on the Next button to move to Export Wizard Step 4. This step has been explained in previously, so we won't outline it again.

Export Non-Transaction Data to Quick Books

You can export a table type rather than transaction type by selecting the table type and clicking Next button in Export Wizard Step 2.

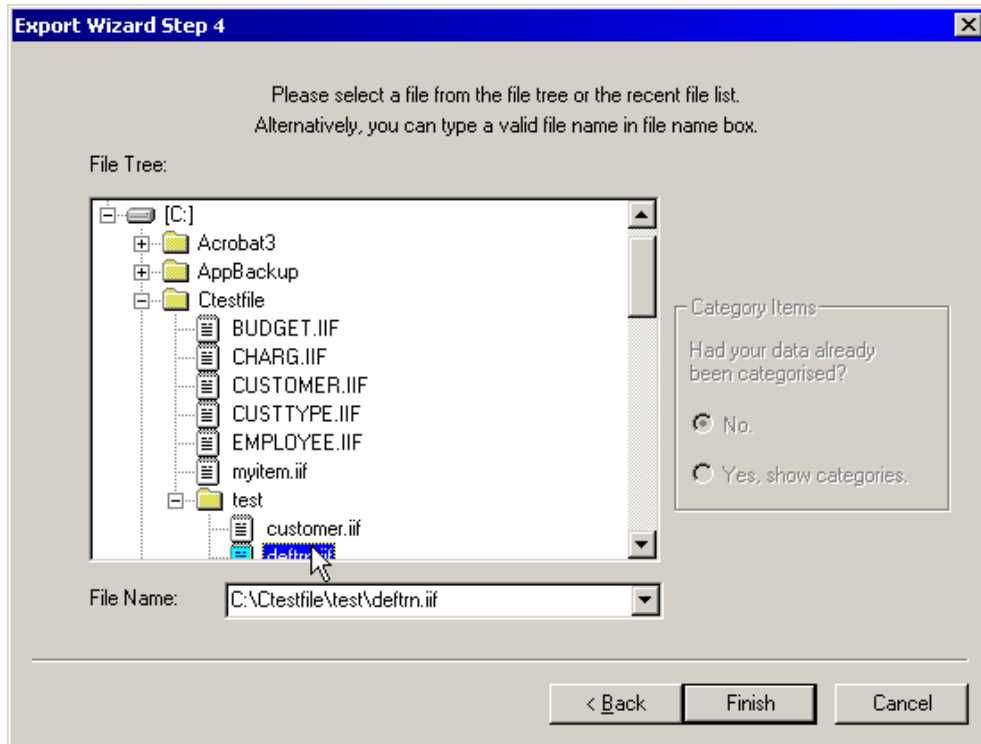


Export Wizard skips step 3., and the step 3.1 window is displayed as below:



The window will map user/customer table in your store database to customer table in Quick Books.

After mapping and clicking Next button, the Export Wizard Step 4 window is shown.



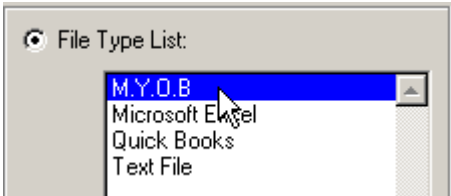
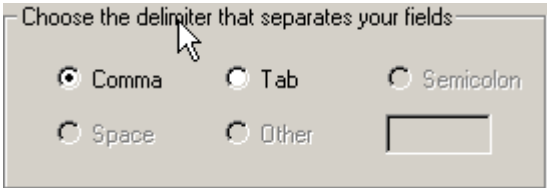
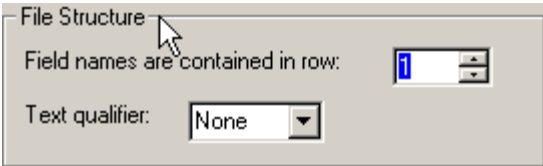
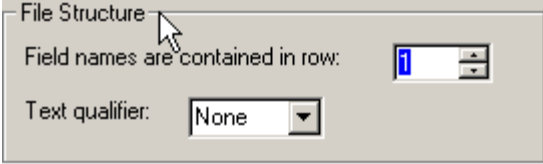
You can export data to QuickBooks formatted file now.


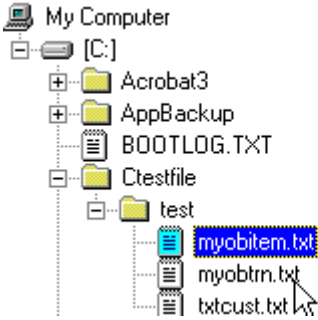
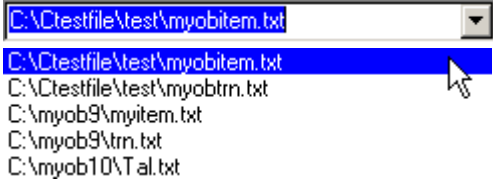
Import / Export INI Files

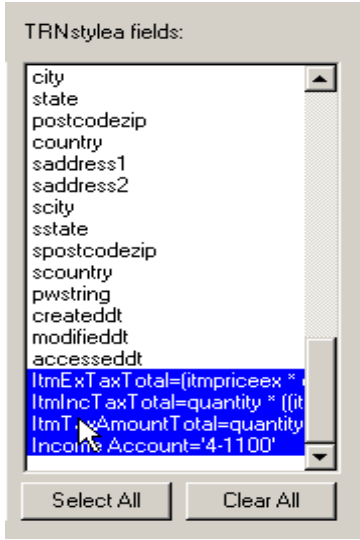
The Import / Export engine uses INI files to store rules and procedures for certain file types. Advanced users, can modify the parameters contained within the ini file to suite file types not catered for by the default files. Note that extreme caution should be taken before modifying the ini files as bad ini files may cause the application to crash. It is good practice to backup your existing ini files before modifications are made.

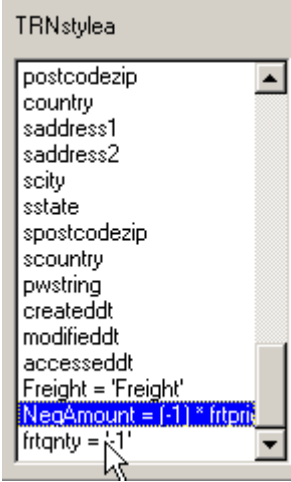
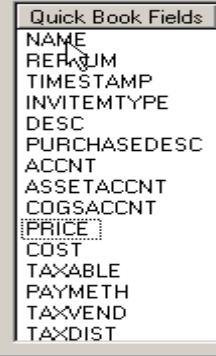
Ini files are stored in a directory called 'filters' within the 'bin' directory in your iNETstore installation path.

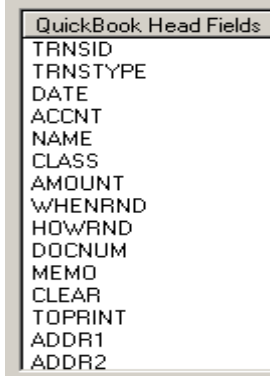
The parameters of an ini file are explained below using a sample MYOB file.

Name=M.Y.O.B	<p>The name that will be shown in File Type List box in import/export wizard step 1.</p> 
FileType=Myob	<p>The file type is a keyword. iNETstore makes use of it to identity file format. You don't need to change it.</p>
FieldNameSep=;	<p>This is a character symbol used to separate the field names in this ini file.</p>
delimiter=comma;tab other=	<p>This is a sequence of characters name separated by FieldNameSep character. It is an option for a user to separate fields' data in a file. Other is used when you would like to specify another type of delimiter.</p> 
fieldrow=1	<p>This is a location line number of field name in an import/export file.</p> 
qualifier=None	<p>This specifies a qualifier that is used to qualify fields' data in import/export file.</p> 

duplicate=1	<p>If the value of duplicate is non-zero, duplicate records will be rejected.</p> 
extension=.txt	<p>It's a sequence of character strings separated by FileNameSep. They are file extensions.</p> 
filecount=5	<p>Number of recent files that are to be stored in the file menu. These files will be automatic added to file name drop down list box.</p>
<p>RECENTFILES1=C:\Ctestfile\test\myobtrn.txt RECENTFILES2=C:\Ctestfile\test\myobitem.txt RECENTFILES3=C:\myob9\myitem.txt RECENTFILES4=C:\myob9\trn.txt RECENTFILES5=C:\myob10\Tal.txt</p>	
DefFields=id;EnabledWeb;CategoryId	<p>Data contained in the fields on the left will be replaced by default values when importing/exporting.</p>
DefFieldsValue=auto;1;1	<p>These values will replace a fields data. Note that the values must be in the order of the fields in the DefFields parameter. 'auto' means that the value of the field is incremented by one for each record.</p>
DefCount=2	<p>Number of default fields</p>

<p>SeparateBy=EntryType</p>	<p>Using by M.Y.O.B and Quick Books transaction exporting. The value of the EntryType field indicates the record line, e.g. sub-transaction or total transaction. You need not change it unless the field name is modified in database.</p>
<p>OrderBy=Orderid</p>	<p>Using by M.Y.O.B and Quick Books transaction exporting. The value of Orderid field indicates a transaction number. You need not change it unless the field name is modified in database.</p>
<p>MstSelFields=Income Account; company;OrderId;itmProductCode; itmPriceEx; itmPriceInc;Quantity</p>	<p>They are a sequence of fields name, which must be exported when exporting.</p>
<p>AdditionFields = itmExTaxTotal = (itmpriceex * quantity); itmIncTaxTotal = quantity * ((itmpriceinc * applytax) + ((1- applytax) * itmpriceex)); itmTaxAmountTotal = quantity * applytax * (itmpriceinc - itmpriceex); Income Account='4-1100'</p>	<p>Used by the export wizard, some calculation fields and/or constant fields will be added as required.</p>  <p>Note: if a constant field is added, you must set the constant field in DefFields and the constant value in DefFieldsvalue.</p>
<p>AdditionHeadFields =</p>	<p>This is used to add calculation fields to transaction table when you export data to QuickBooks.</p>

<p>AdditionFreightField = Freight = 'Freight'; NegAmount = (-1) * frtpriceinc;frtqty = '-1'</p>	<p>This is used to add some calculation fields to the freight record when you export data to QuickBooks.</p> 
<p>ITMFields=INVITEM;NAME; REFNUM; INVITEMTYPE;DESC; ACCNT</p>	<p>These fields are fields names of the item table in QuickBooks.</p> 
<p>CTGFields = CLASS; NAME;</p>	<p>These fields are fields name of class table in QuickBooks.</p>
<p>FRTFields = SHIPMETH;NAME; REFNUM;TIMESTAMP;HIDDEN</p>	<p>These fields are fields name of freight table in QuickBooks.</p>
<p>USRfields=CUST;NAME;REFNUM; TIMESTAMP;BADDR; PHONE</p>	<p>These fields are fields name of user table in QuickBooks.</p>
<p>TRNFields=SPL;SPLID;TRNSTYPE; ACCNT;NAME; AMOUNT</p>	<p>These fields are fields name of distributed items in transaction table in QuickBooks.</p>

<p>Headfields=TRNS;TRNSID; TRNSTYPE; ACCNT;NAME;CLASS; AMOUNT</p>	<p>These fields are fields name of transaction table in QuickBooks.</p>	 <p>QuickBook Head Fields TRNSID TRNSTYPE DATE ACCNT NAME CLASS AMOUNT WHENRND HOWRND DOCNUM MEMO CLEAR TOPRINT ADDR1 ADDR2</p>
<p>defmapping = NAME=name; REFNUM=productcode</p>	<p>This is used to default map fields from your store database to QuickBooks.</p>	
<p>Headdefmapping = TRNSID=orderid;TRNSTYPE=id; ACCNT=id;NAME=fullname; AMOUNT=totalpayable</p>	<p>This is used to default map some fields of transaction table in your store database to fields of transaction table in QuickBooks.</p>	
<p>freightmapping=SPLID=orderid; TRNSTYPE=id; ACCNT=id; NAME=Freight='Freight'; AMOUNT=NegAmount=(-1) * frtpriceinc;QNTY=frtqty='-1'</p>	<p>This is used to default map some fields of transaction table to fields of freight table in QuickBooks.</p>	
<p>HeadMstSelFields=TRNSTYPE; ACCNT; AMOUNT; NAME</p>	<p>Some fields must be exported when exporting subtotal transaction to QuickBooks.</p>	
<p>HeadDeffield = TRNSTYPE; ACCNT</p>	<p>These head fields' data will be replaced by default values when exporting subtotal transaction to QuickBooks.</p>	
<p>HeadDefValue = INVOICE; Accounts Receivable</p>	<p>These values will replace head fields' data in order.</p>	
<p>HeadDefcount = 2</p>	<p>Number of default head fields</p>	