

# Stock Synchronisation

This document will explain:

How to update information in your current Jim2 stock records, such as Vendor Pricing, Stock Descriptions, and Report Level Groups.

Jim2 can **import** CardFile and Stock Records via Tools > Import Data. The data is required to be presented in a very specific manner – in an \*.xls, \*.xlsx, or \*.csv file format.

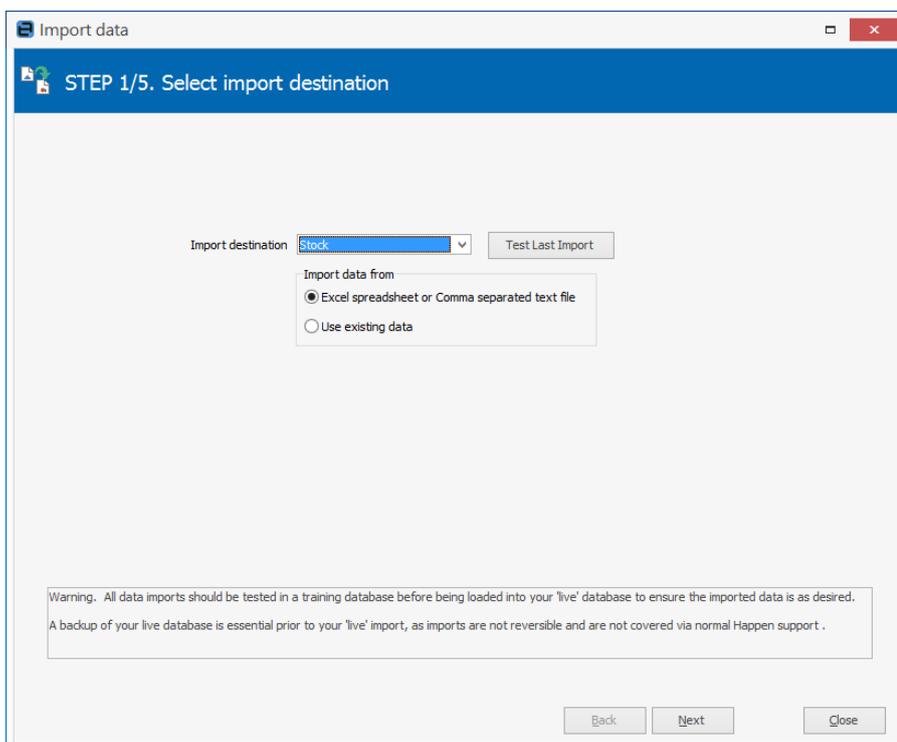
The column headings and column formats required are included in Stock Import and CardFile Import template files available from Happen Business.

**Synchronising** requires matching the current stock code, and then importing the information that has changed – eg altered list price, different Report Level Groups, etc.

The processes of importing and synchronising also require a mapping file. This file (\*.j2m) is a file that matches the column headings in the stock file to the field names in Jim2. Numerous \*.j2m files can be saved, and then re-used when synchronisation is required.

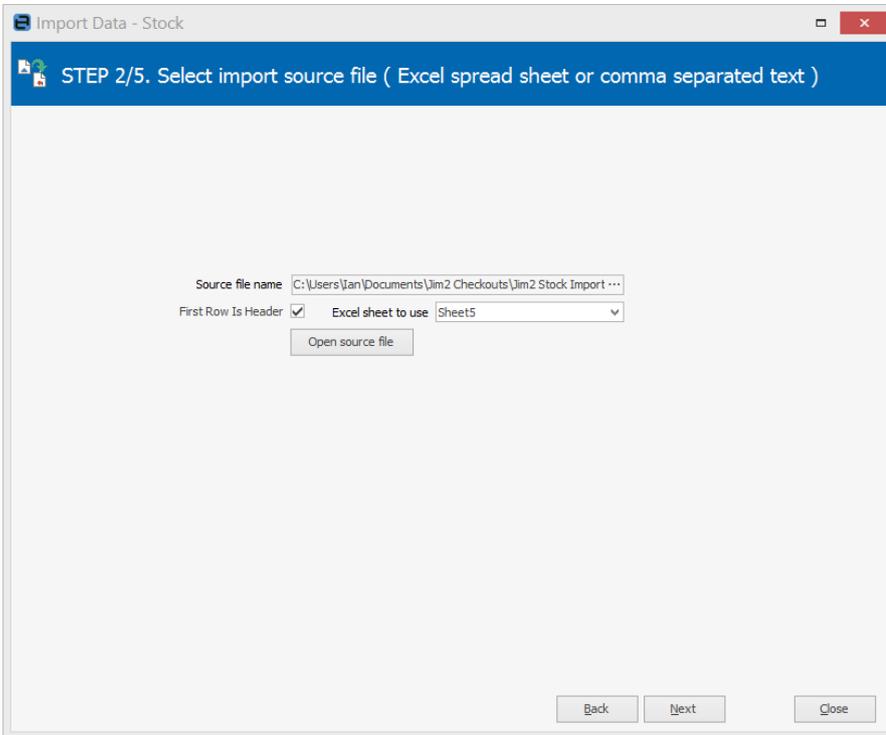
The best way to understand data synchronising is to practise. Using the training database, you can synchronise stock records.

Tools > Import Data

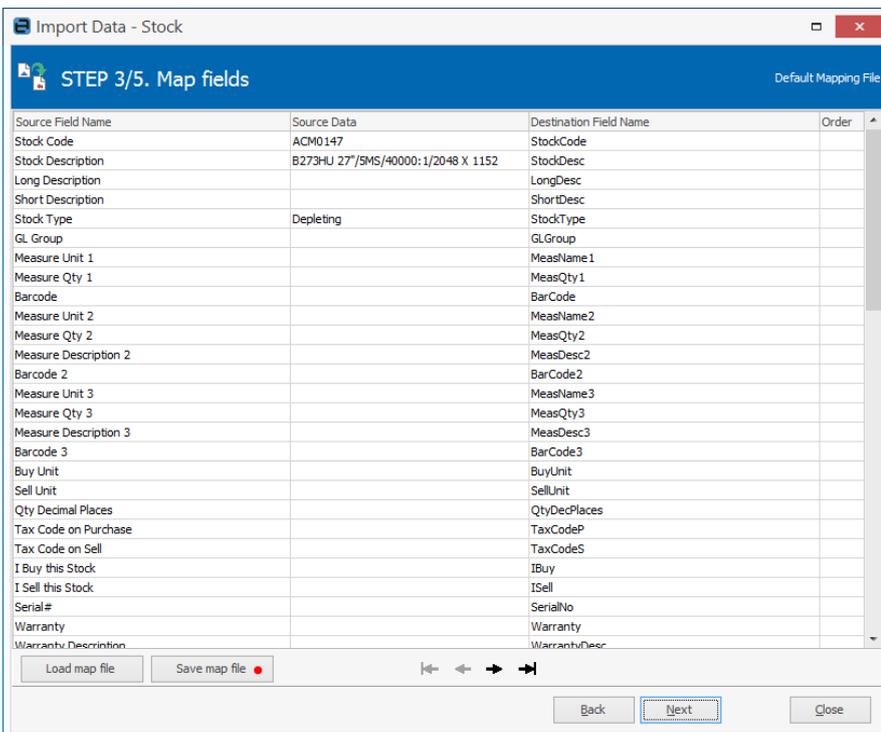


Select the file which contains the new data, and where it is a file with multiple sheets, select the correct one.

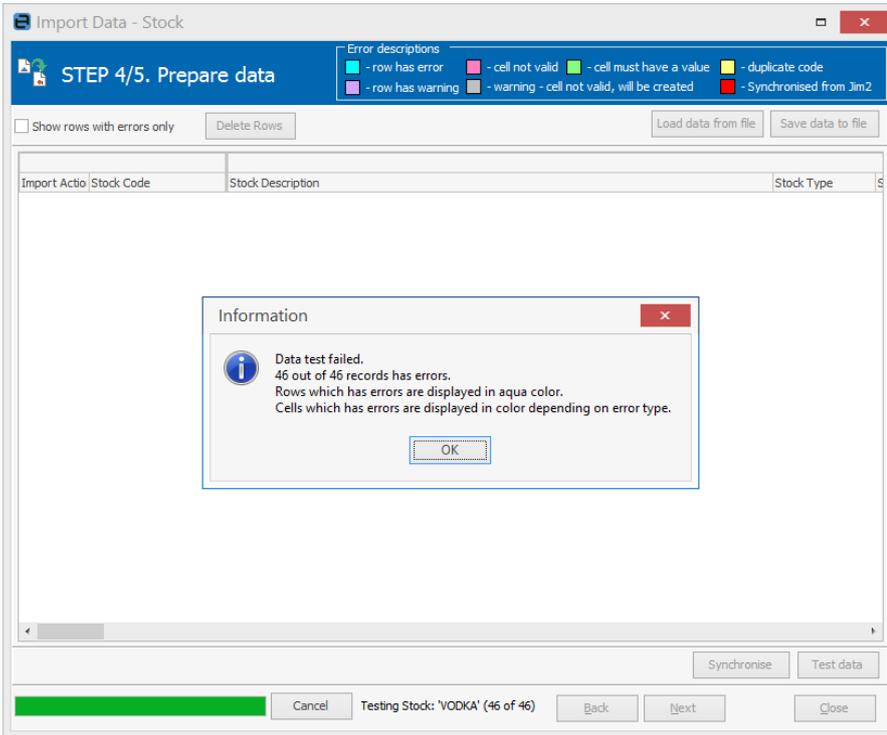
Click 'Open source file', and Jim2 will test the data.



Click 'Next'.

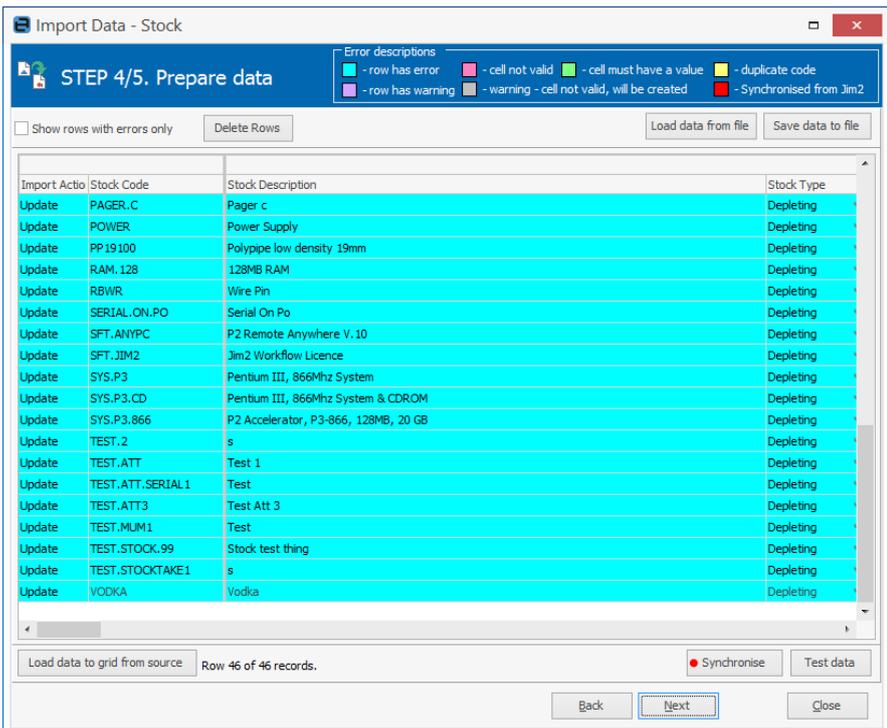


Save the map file to re-use and click 'Next'.



Click 'OK'.

In the example below, the import has failed as the data is for synchronising, it isn't new stock to be added. Importing new stock requires far more information, and the legend at the top of the Import Data window indicates the issues with various columns and rows. Click 'Synchronise'.



In most circumstances, there will be no need to alter the Synchronise window. Simply click 'OK'.

The screenshot shows the 'Import Data - Stock' window at 'STEP 4/5. Prepare data'. A 'Stock Synchronization' dialog box is open, allowing configuration of synchronization settings. The background table lists various stock items with their codes and descriptions.

Import Action	Stock Code	Stock Description	Stock Type
Update	ACM0.147	B273HU	Depleting
Update	ASU1042A	EEEP99	Depleting
Update	BOTT.VODKA	Bottle of	Depleting
Update	BOX	Comput	Depleting
Update	CANON.5300.R	Refurbis	Depleting
Update	CARTON	Carton	Depleting
Update	CDROM.EXP	Express	Depleting
Update	COL.1999	HP AIT-	Depleting
Update	COLOTECH.A4	80gsm P	Depleting
Update	CPU.P3.866	Pentium	Depleting
Update	FDD.144	FDD 144	Depleting
Update	GLASS.BOTTLE	Glass Bo	Depleting
Update	GLASS.BOTTLE2	Glass Bo	Depleting
Update	HDD.8GB	HDD Har	Depleting
Update	HDD.20GB	HDD Har	Depleting
Update	KEN.TEST1	Ken Tes	Depleting
Update	KEYBOARD	MS Keyboard	Depleting
Update	MANUAL	Manual	Depleting
Update	MB	Motherboard	Depleting
Update	MOD.TIG.5600	Modem Tiger 56K External	Depleting

If the Data Test is successful, then click 'OK'.

The screenshot shows the 'Import Data - Stock' window after a successful data test. An 'Information' dialog box is displayed in the center, indicating that the data test was successful. The background table is mostly empty, with a status bar at the bottom showing 'Testing Stock: 'VODKA' (46 of 46)'.

Now click 'Next'.

**STEP 4/5. Prepare data**

Error descriptions:  
■ - row has error    ■ - cell not valid    ■ - cell must have a value    ■ - duplicate code  
■ - row has warning    ■ - warning - cell not valid, will be created    ■ - Synchronised from Jim2

Show rows with errors only    Delete Rows    Load data from file    Save data to file

Import Action	Stock Code	Stock Description	Stock Type
Update	ACM0147	B273HU 277/SMS/40000:1/2048 X 1152	Depleting
Update	ASU1042A	EEEEPC901 + LOGITECH 2.1 SPEAKER/HUB	Depleting
Update	BOTT.VODKA	Bottle of Vodka	Depleting
Update	BOX	Computer Case	Depleting
Update	CANON.5300.R	Refurbished Canon 5300	Depleting
Update	CARTON	Carton	Depleting
Update	CDROM.EXP	Express Infra CDROM 52x	Depleting
Update	COL1999	HP AIT-3 200GB DATA CARTRIDGE	Depleting
Update	COLOTECH.A4	80gsm Paper White	Depleting
Update	CPU.P3.866	Pentium III, 866 Mhz	Depleting
Update	FDD.144	FDD 144MB, 3.5"	Depleting
Update	GLASS.BOTTLE	Glass Bottle	Depleting
Update	GLASS.BOTTLE2	Glass Bottle	Depleting
Update	HDD.8GB	HDD Ramsgate 8GB	Depleting
Update	HDD.20GB	HDD Ramsgate 20GB	Depleting
Update	KEN.TEST1	Ken Test	Depleting
Update	KEYBOARD	MS Keyboard	Depleting
Update	MANUAL	Manual	Depleting
Update	MB	Motherboard	Depleting
Update	MOD.TIG.5600	Modem Tiger 56K External	Depleting

Row 1 of 46 records.    Synchronise    Test data

Back    Next    Close

The final window will advise you of how many records it will Update. Click 'Import data' to complete.

**STEP 5/5. Import data**

Database: **Jim\_Demo**  
 Destination: **Stock**

New Records: **0**  
 Update Records: **46**  
 Delete Records: **0**

Don't update existing records  
 Print report after Import

Import data    Test Import

Back    Next    Close

For further assistance or information please call Happen support on 02 9570 4696 or email [support@happen.biz](mailto:support@happen.biz)