



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

Import data	destination		×
Import destination	Stock V Test Last Import Inport data from Excel spreadsheet or Comma separated text file Use existing data		
Warning. All data imports should be tested in A backup of your live database is essential pric	a training database before being loaded into your 'live' database to ensure the imported data is as d or to your 'live' import, as imports are not reversible and are not covered via normal Happen support	esired.	







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.

🛢 Import Data - Stock		□ ×
STEP 2/5. Select import :	source file (Excel spread sheet or comma separated to	ext)
Source file name	C:\Users\Jan\Documents\Jim2 Checkouts\Jim2 Stock Import ···	
First Row Is Header	Excel sheet to use Sheet5 v	
	Back Next	Close

Click 'Next'.

🛢 Import Data - S	tock			□ ×
STEP 3/5.	Map fields			Default Mapping File
Source Field Name		Source Data	Destination Field Name	Order 🔺
Stock Code		ACM0147	StockCode	
Stock Description		B273HU 27"/5MS/40000:1/2048 X 1152	StockDesc	
Long Description			LongDesc	
Short Description			ShortDesc	
Stock Type		Depleting	StockType	
GL Group			GLGroup	
Measure Unit 1			MeasName1	
Measure Qty 1			MeasQty1	
Barcode			BarCode	
Measure Unit 2			MeasName2	
Measure Qty 2			MeasQty2	
Measure Description 2			MeasDesc2	
Barcode 2			BarCode2	
Measure Unit 3			MeasName3	
Measure Qty 3			MeasQty3	
Measure Description 3			MeasDesc3	
Barcode 3			BarCode3	
Buy Unit			BuyUnit	
Sell Unit			SellUnit	
Qty Decimal Places			OtyDecPlaces	
Tax Code on Purchase			TaxCodeP	
Tax Code on Sell			TaxCodeS	
I Buy this Stock			IBuy	
I Sell this Stock			ISel	
Serial#			SerialNo	
Warranty			Warranty	
Warranty Description			WarrantyDesc	•
Load map file	Save map file 🛛	+ + →	*	
			Back	Close







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

🛢 Import Data - Stock				□ ×
STEP 4/5. Prep	are data	descriptions ow has error 📃 - cell not valid ow has warning 📃 - warning - cel	cell must have a value	- duplicate code - Synchronised from Jim2
Show rows with errors only	Delete Rows		Load data fro	m file Save data to file
Import Actio Stock Code	Stock Description			Stock Type S
	Information Data test failed. 46 out of 46 record Rows which has er Cells which has er	ds has errors. rrors are displayed in aqua color rors are displayed in color deper	× nding on error type,	
4	Cancel Tes	sting Stock: 'VODKA' (46 of 46)	Syn Back Next	chronise Test data

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'.

🛢 Impo	rt Data - Stock		
S.	TEP 4/5. Prepa	re data Fror descriptions - cell not valid - cell must have a value - cell not valid - cell must have a value - cell not valid, will be created - row has warning - warning - cell not valid, will be created	- duplicate code - Synchronised from Jim.
Show ro	ws with errors only	Delete Rows Load data from	file Save data to file
Import Act	io Stock Code	Stock Description	Stock Type
Jpdate	PAGER.C	Pager c	Depleting
Jpdate	POWER	Power Supply	Depleting
Jpdate	PP 19 100	Polypipe low density 19mm	Depleting
Jpdate	RAM.128	128MB RAM	Depleting
Jpdate	RBWR	Wire Pin	Depleting
Jpdate	SERIAL.ON.PO	Serial On Po	Depleting
Ipdate	SFT.ANYPC	P2 Remote Anywhere V. 10	Depleting
Ipdate	SFT.JIM2	Jim2 Workflow Licence	Depleting
Jpdate	SYS.P3	Pentium III, 866Mhz System	Depleting
Jpdate	SYS.P3.CD	Pentium III, 866Mhz System & CDROM	Depleting
Jpdate	SYS.P3.866	P2 Accelerator, P3-866, 128MB, 20 GB	Depleting
Jpdate	TEST.2	s	Depleting '
Jpdate	TEST.ATT	Test 1	Depleting
Jpdate	TEST.ATT.SERIAL1	Test	Depleting '
Jpdate	TEST.ATT3	Test Att 3	Depleting
Jpdate	TEST.MUM1	Test	Depleting
Jpdate	TEST.STOCK.99	Stock test thing	Depleting
Update	TEST.STOCKTAKE1	S	Depleting
Jpdate	VODKA	Vodka	Depleting
•			•
Load dat	a to grid from source	ow 46 of 46 records.	ronise Test data
		Back Next	Close







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

ST	TEP 4/5. Prep	are data	Error descr - row h	iptions	ust have a value 🔡 - dup vill be created 🚺 - Syr	licate code
Show row	vs with errors only	Delete Rows			Load data from file	Save data to file
Import Acti J pdate	o Stock Code ACM0147	Stock Desi	cription Stock Synchror	ization]	Stock Type Depleting
Jpdate Jpdate Jpdate	ASU 1042A BOTT, VODKA BOX	EEEPC90 Bottle of Compute	If not found by S	itock Code sync by Vendor Stock Code missing data for new Stock		Depleting Depleting Depleting
Update Update Update	CANON. 5300.R CARTON CDROM.EXP	Refurbis Carton Express	Mark stock for Vendor	deleting if not found in source		Depleting Depleting Depleting
Update Update Update	COL07ECH.A4 CPU.P3.866	HP AIT-: 80gsm P Pentium	Report Level 2 Report Level 3	× ×		Depleting Depleting Depleting
Update Update	GLASS.BOTTLE GLASS.BOTTLE2	Glass Bo Glass Bo	Report Level 4 Report Level 5	v v		Depleting Depleting
Update Update Update	HDD.20GB KEN.TEST1	HDD Rar HDD Rar Ken Test		Cancel		Depleting Depleting
Update Update Update	KEYBOARD MANUAL MB	MS Keyboa Manual Motherboa	ard			Depleting Depleting Depleting
Update ∢	MOD.TIG.5600	Modem Tig	ger 56K External			Depleting •
low 1 of 46	i records.			<u>B</u> ack	Synchronis <u>N</u> ext	e Test data <u>C</u> lose

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

🛢 Import Data - Stock				□ ×
STEP 4/5. Prepa	are data	Error descriptions - row has error - cell not va - row has warning - warning - warning -	slid 📃 - cell must have a value cell not valid, will be created	- duplicate code - Synchronised from Jim2
Show rows with errors only	Delete Rows		Load data	from file Save data to file
		Information × Data test successful. OK		
Load data to grid from source	Row 1 of 46 records.		2	Synchronise Test data
	Cancel	Testing Stock: 'VODKA' (46 of 46)	<u>B</u> ack <u>N</u> ext	Close







Now click 'Next'.

🛃 Import	Data - Stock		□ ×
📲 ST	EP 4/5. Prepa	are data	olicate code nchronised from Jim2
Show rows	with errors only	Delete Rows	Save data to file
Import Actio	Stock Code	Stock Description	Stock Type
Jpdate	ACM0147	B273HU 27"/5MS/40000:1/2048 X 1152	Depleting '
Jpdate	ASU1042A	EEEPC901 + LOGITECH 2.1 SPEAKER/HUB	Depleting '
Jpdate	BOTT.VODKA	Bottle of Vodka	Depleting \
Jpdate	BOX	Computer Case	Depleting '
Jpdate	CANON.5300.R	Refurbished Canon 5300	Depleting \
Jpdate	CARTON	Carton	Depleting \
Jpdate	CDROM.EXP	Express Infra CDROM 52x	Depleting '
Jpdate	COL 1999	HP AIT-3 200GB DATA CARTRIDGE	Depleting 1
Jpdate	COLOTECH.A4	80gsm Paper White	Depleting \
Jpdate	CPU.P3.866	Pentium III, 866 Mhz	Depleting \
Jpdate	FDD. 144	FDD 144MB, 3.5"	Depleting \
Jpdate	GLASS.BOTTLE	Glass Bottle	Depleting 1
lpdate	GLASS.BOTTLE2	Glass Bottle	Depleting 1
Ipdate	HDD.8GB	HDD Ramsgate 8GB	Depleting 1
Jpdate	HDD.20GB	HDD Ramsgate 20GB	Depleting 1
Ipdate	KEN.TEST1	Ken Test	Depleting 1
Jpdate	KEYBOARD	MS Keyboard	Depleting
Jpdate	MANUAL	Manual	Depleting
Jpdate	MB	Motherboard	Depleting
Jpdate ∢	MOD.TIG.5600	Modem Tiger 56K External	Depleting V
low 1 of 46 r	ecords.	Synchronis	e Test data
		Back	<u>C</u> lose

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

🛢 Import Data - Stock					•	×
STEP 5/5 Import data						
	Database:	Jim_Demo				
	Destination:	Stock				
	New Records:	0				
	Update Records:	46				
	Delete Records:	0				
	Don't update exist	ing records				
	• Philitiportaiter 1					
	Import data	Test Import				
			Back	Next	<u>C</u> lose	

For further assistance or information please call Happen support on 02 9570 4696 or email support@happen.biz

