UPDATING LARGE AMOUNTS OF DATA

Global updates

There are times when you need to make the same change on a large group of data.   For example, a salesman leaves and you want to assign all his customers to a new salesman number.   It is very time consuming (not to mention boring!) to call up each customer and make the same change.   Now, in Version 12, there are some new functions that will let you do all the changes at once.   We call these "Global" updates.

We will use the salesman change as our example because it is a very common problem.

Here are the steps you would need to take:

1. **Go to Create-A-Report, Extract/Sort report data.   Generate an extract file containing all the customers whose salesman number you wish to change.**

    In the example above, this would be all customers having the old salesman number.

    If you are not familiar with the Create-A-Report extract function, check out the Online Manual under the Help heading at the bottom right side of the menu.

2. **Go to Create-A-Report, Global updates, Global updates of data on customer file from CAR list**.

    You will see a screen something like this:

Check the box of all the data you want to change, then enter the new code.

You can change more than one code at a time. For example, you could set both the primary and the secondary salesman numbers.

Just leave the check boxes for the other types of data unchecked. They will be not be affected by the change.

That's all there is to it!

The types of data listed are the ones we've been asked to do these types of changes on in the past. Additional fields may be added in the future.

There are similar screens for vendors, items, and orders.

Updating data from a File

Sometimes the data is a little more complicated than the scenario described above. For example, you may be reassigning customer numbers based on region. Or you want to update a new price list for your items. For these types of situations, we have set up a new function to let you update the data from a tab-delimited or an Excel file.

You can create the file in any way you wish. For example, you may extract the data you want to change and export it to Excel. Then, make the adjustments you want to make and update the Lakeshore file with those changes.

Suppose you have this file.

	A	B	C	D	E	F	G	H	I	J	K	L
1	Current Sls	Customer	Customer Name	Sls #1	Sls#1 Name	Sls #2	Sls#2 Name	Current Terms	New Credit Rtn	Credit Terms		
2	1	100000	ATTENTION!	2	Kaye Keady	8	Daphne DesBordes	Net 30	2	Net 15		
3	1	151413	RICHIE RICH	2	Kaye Keady			Net 30	1	Net 30		
4	3	777777	SAPPHIRE COMPUTING	3	Scott French			Net 30	3	C/C Only		
5												
6												

Go to **Reference Information, Customer, Update customer from file** and fill out the screen as follows:

Update Customer data from file   V12

File Name (full path)	slschanges.xls		Upload file
Type of file:	○ Tab-delimited text file ⦿ Excel		
Number of heading lines	1		

Customer number must be one of the columns specified

Column on S/S	Data field		Column on S/S	Data field		Column on S/S	Data field
A			AA			BA	
B	0650	Customer Number	AB			BB	
C			AC			BC	
D	6467	Salesman Number	AD			BD	
E			AE			BE	
F	6476	Second Salesman Number	AF			BF	
G			AG			BG	
H			AH			BH	
I	0635	Credit Routine	AI			BI	
J			AJ			BJ	
K			AK			BK	
L			AL			BL	
M			AM			BM	
N			AN			BN	

Submit   Reset   Exit

Enter the name of your file.   The file must be saved on the Linux server.   However, you may use the "Update file" function to upload a file from your PC to the Linux.   See instructions below.   The file from the upload will be placed in the "windows_area" directory on the server. If you enter the file into another Linux directory, enter the full path of the file including all directory and subdirectory references.

Indicate whether the file is in tab-delimited or Excel format

Enter the number of heading lines on the file.   These will not be processed as data.

Indicate which columns contain the data you want to change as well as which one contains the customer number.   Enter the data element number of the type of data included in the column.   For example, "0650" is the data element number of the "Customer Number".   You can use the look up icon to look up the appropriate data element number.

One of the columns must include the customer number.

Leave blank any column that contains data you are **not** changing.   For example, column "C" might contain the customer name.   However, we are not changing that piece of information so the box beside the "C" column is left blank.

When you click "Submit", the customer data on the file will have the changes you have included on the file posted to the Lakeshore customer file.

A similar update scripts is available for the item file.   For the item updates, you may save the "specs" you use and use them over and over.

Uploading a file for the "update" function

If you click on the "Upload file" link on the update screen, a window like the following will open up.
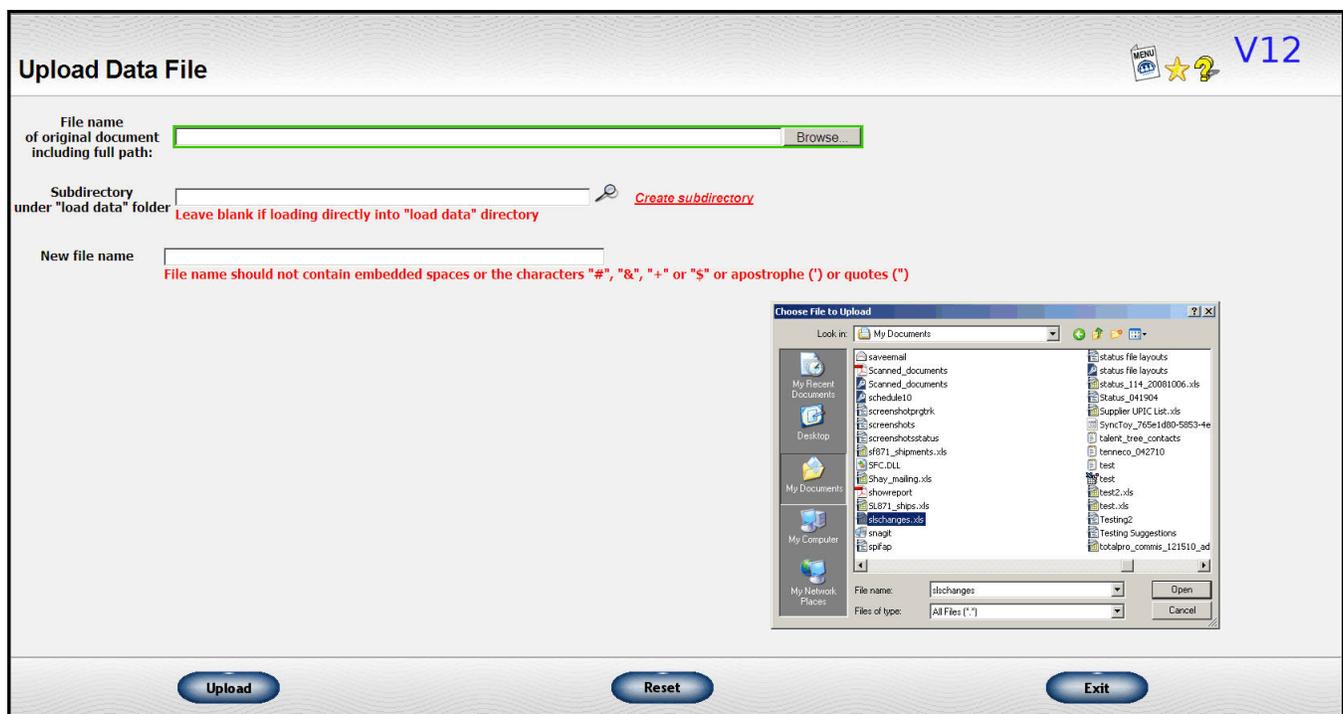
Click on the Browse button and you will see your regular "My Computer" dialog where you can look up the file you want to upload.

Once you select it, the name will be copied to the new file name. If your original file name has embedded spaces or certain characters that Linux doesn't allow in file names, these will be replaced with underscore characters. You may change the new file name if you wish.

Once you click the "Upload" button, the file will be uploaded to the "windows_area" directory on the Linux server. You will be returned to the original update screen and the file name will be filled in with the file you uploaded.

This upload works for the customer and item updates as well as for update script used to generate orders from a file.