



User Guide

Package Import Add On
V21.1.0200

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EFI PrintStream | V21.1.0200 Package Import Add On User Guide

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Introduction

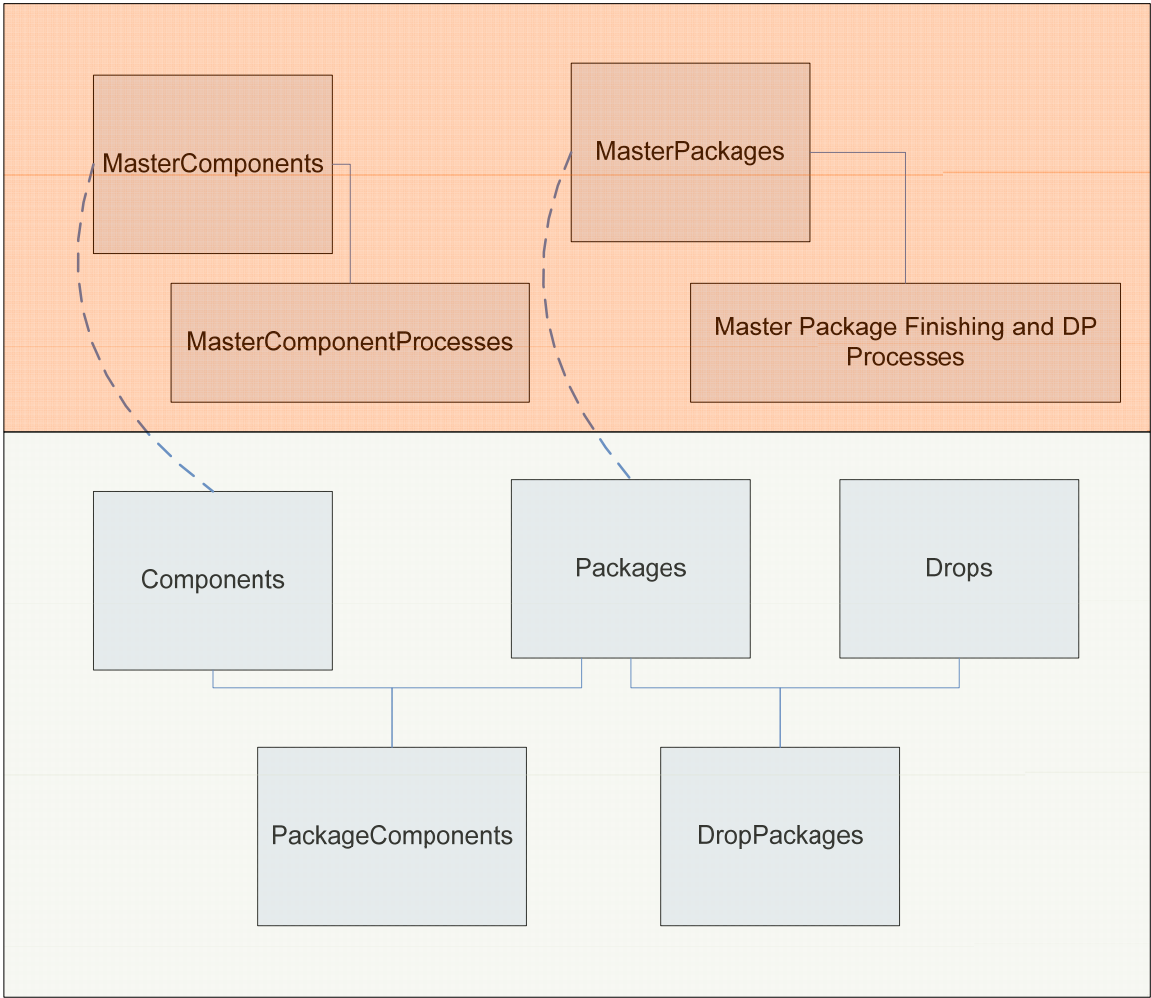
Overview

This program supports importing new packages, components, drops to an existing quote/job based on a master definition of components, packages, processes.

The figures in orange shaded area are already defined in the Quote/Job.

The figures in gray shaded area are supplied in the excel file in formats a, b and c.

The program will enable the user to connect the dotted lines in the figure. By this connection, the program will copy component processes and package processes from the Quote to the new packages and components.



Contact Information

EFI Support

US Phone:	855.334.4457 (first select option 3, then press option 8, then press option 1)
US Fax:	415.233.4157
US E-mail:	printstream.support@efi.com

Regular Service Desk hours are 8:00 AM to 7:00 PM Central Time, Monday – Friday. Outside of these hours, you may leave a voice mail message and an on-call support representative will be paged. Response time is based on the severity of the issue.

Note For problems involving infrastructure (i.e., computers, networks, operating systems, backup software, printers, third-party software, etc.), contact the appropriate vendor. EFI cannot support these types of issues.

EFI Professional Services

US Phone:	651.365.5321
US Fax:	651.365.5334
E-Mail:	ProfessionalServicesOperations@efi.com

EFI Professional Services can help you perform EFI software installations, upgrades, and updates. This group can also help you implement, customize, and optimize your EFI software plus offer a range of training options.

Steps in Running the Program

1. Enter a Quote Number or a Job Number. Locate and select a Package Import spreadsheet. Choose a Format. (a, b or c). Clear the box.

File Contains Inventory Code/Customer Code combination if you are using an “unlinked” spreadsheet. Click **Next**.

Package Import Utility
Step 1. Enter Quote and Excel File Details

Quote # or Job Number

File Location

Excel Format

PkgNo	1	2
PkgName	Package-1	Package-2
PkgQty	1,000	2,000
PkgNotes	Notes	Notes
DropNo	1	2
DropDate	10/20/2006	10/27/2006

Sort Order	Component Type	Inventory Code	Inventory Descr	Facing Direction	Affix To	Inserting Sequence	Inserting Sequence
1	BRE	BRE 1106	AC BRE w/ Flap >			1.0	1.0
2	LETTER	LETTER-001	AC Direct Le Flap >				2.0
3	STICKER	STK-0012	Direct "I" Acq Affix	Form		2.0	

Inventory Codes Import

File Location

☐ File Contains Inventory Code / Customer Code Combination

2. Click **Next**. On the left side panel, you will see all component “types” in the excel file. If you had 3 letter components and 2 BRE components, you will see 1 Letter type and 1 BRE type in the left side panel. On the right side, you will see the master components in Quote. To link an excel component to a Quote component, select the Quote component. Then select one or more excel components in the left side panel and drag/drop on to the right side panel. If you have selected multiple components hold down the shift key while dragging.
3. Click **Next**. On the left side panel, you will see “packages” in the excel file. To link an excel package to a Quote package, select the Quote package. Then select one or more excel packages in the left side panel and drag/drop on to the right side panel. If you have selected multiple packages hold down the shift key while dragging. Click Next.

Package Import Utility
Step 3. Map Packages in Excel File to Packages in Quote

Package #	Name	Quantity
1	Package-1	1000
2	Package-2	2000

Packages in Quote

- Default Package

To map, select the package in Quote, then select the Package in Excel File and drag and drop to the right hand tree

4. You will see a summary of tasks the Package import program will perform. You have the option of deleting master components, master packages and master drops at this stage. Click **Finish**.

The screenshot shows the 'Package Import Utility' window at 'Step 4. Confirm Selection'. On the left, there are four input fields: 'Inventory Items to be Created' (0), 'Components to be Added' (5), 'Packages to be Added' (2), and 'Drops to be Added' (2). Below these are four checkboxes: 'Create Inventory Items for missing Inventory Codes' (unchecked), 'Delete Master Components' (checked), 'Delete Master Packages' (checked), and 'Delete Master Drops' (unchecked). On the right is a large yellow rectangular area. At the bottom right, there are three buttons: '<-- Prev', 'Finish' (which is circled in red), and 'Cancel'.

How the Program Creates New Inventory Codes

Component Inventory Code in Excel already exists? (Quote.Customer + Inventory Code combination)	Is Quote Component linked to an Inventory Item?	System Will Work?	Additional Remarks
No	Yes	Yes	System will create new inventory items if the Excel has inventory code + description. The new item will inherit all other properties from the item which is linked to the Quote Component.
Yes	No	Yes	System will link the inventory code to the Excel Component.
Yes	Yes	Yes	Inventory Item can be substituted by another Item that belongs to the Quote Customer.
No	No	No	

To create new Inventory Codes

The program supports importing new inventory codes in the following format.

	A	B	C	D	E	F
1	Inventory Code	Description	Item Type	Customer Number	Activity Code	Product Code

Use the inventory codes Import section in the first tab. Locate and select the inventory spreadsheet and click Import.

Package Import Utility

Step 1. Enter Quote and Excel File Details

Quote #

 or Job Number

File Location

...

Excel Format

Component-Package

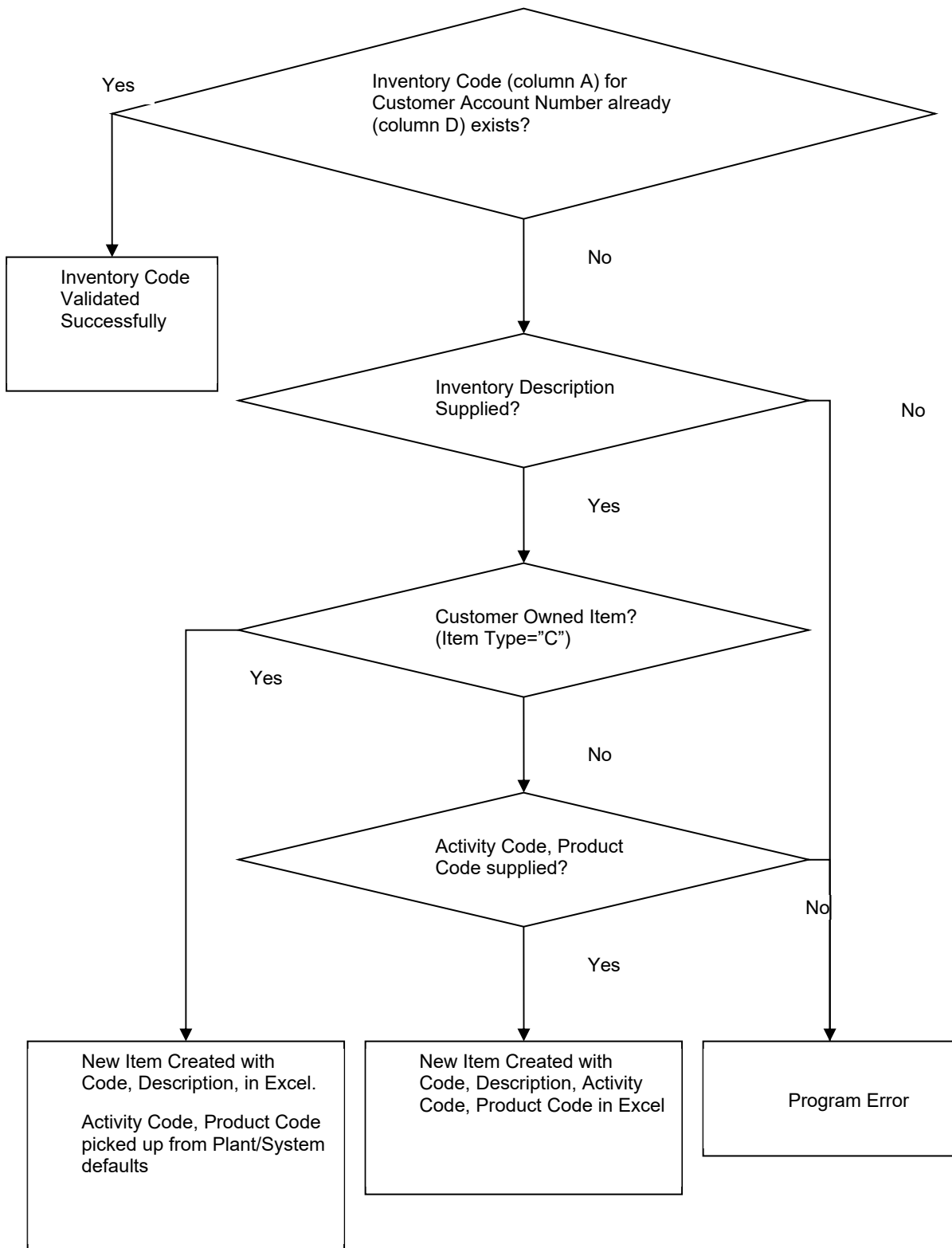
Inventory Codes Import

File Location

C:\gavinimporttesting\Inventory Import.xls

Import

Link SpreadSheets



Linking Inventory Spreadsheet with Package Import Spreadsheet

1. Locate and select a file for Inventory Import. Click Import. Perform this step even if the items were already imported. The system will need to validate it during linking.
2. Locate and select a partially-blank file for Package Import spreadsheet (see Format-A without Inventory Codes.xls).
3. Click Link Spreadsheets.

After this step, you will see that the Package import spreadsheet has 2 sheets. The 2nd sheet has all the valid inventory codes created/validated in step 1. In the first sheet, when you click the Inventory Code column you will see a drop-down of valid inventory codes to select from. This has both the Inventory Code + Customer code separated by a '|' character.

Linking Inventory Spreadsheet will work only for Formats A and B. Format C is not supported.

Using a “Linked” Spreadsheet for Package Import

If you are using a “linked” spreadsheet for package import, please select the **File Contains Inventory Code/Customer Code Combination** check box.

Package Import Utility
Step 1. Enter Quote and Excel File Details

Quote # or Job Number

File Location ...

Excel Format

PkgNo	1	2
PkgName	Package-1	Package-2
PkgQty	1,000	2,000
PkgNotes	Notes	Notes
DropNo	1	2
DropDate	10/20/2006	10/27/2006

Sort Order	Component Type	Inventory Code	Inventory Descr	Facing Direction	Affix To	Inserting Sequence	Inserting Sequence
1	BRE	BRE 1106	AC BRE w/Flap >			1.0	1.0
2	LETTER	LETTER-001	AC Direct LeFlap >			2.0	2.0
3	STICKER	STK-0012	Direct "I Acc Affix	Form			

Inventory Codes Import

File Location ...

☒ File Contains Inventory Code / Customer Code Combination

Other documents. Please refer to the following documents which are referred to in the above.

- Format –A after Inventory Spreadsheet linking.xls
- Format-A with Inventory Codes.xls
- Format-A without Inventory Codes.xls
- Formatb.xls
- Formatc.xls
- Inventory Import.xls