

Fact Sheet – Importing Suppliers Catalogues

It is essential that you take a backup of your data before proceeding with the supplies catalogue import routine.

It is recommended that the supplies catalogue information be copied from the floppy disk onto the hard drive of the machine containing the RM Finance application; this will reduce the time taken for the import.

The import routine is as follows:

1. Select **Records** from the RM Finance control panel.
2. From the 'Records' window select the option **Supplies Catalogue**.
3. From the 'Supplies Catalogue' window select the option **Import**.
4. In the 'Catalogue Import Settings' window, enter an appropriate name for the 'Default Supplier', (our brand) select the import format **Delimited Tabs** and finally click on the **OK** button (see figure 1).

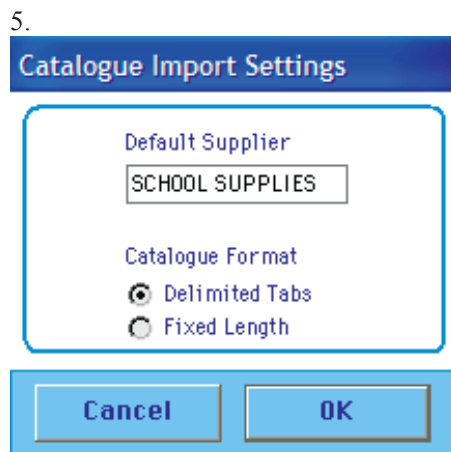


Figure 1 - Catalogue Import Settings' window.(N.B The default supplier shown is for illustrative purposes only.)

5. You should now locate the catalogue import file from the 'Select Import File' window before clicking on the **OK** or **Open** button (see figure 2).

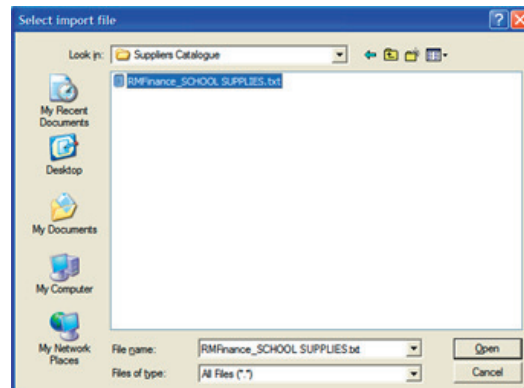


Figure 2 - The Select Import File window. (N.B. The file name shown is for illustrative purposes only may vary.)

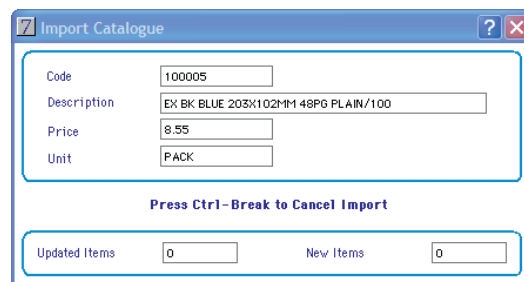


Figure 3 - The Import Catalogue window.

6. Once the data file has been located, the 'Import Catalogue' window will appear, displaying the first record of the catalogue. This will enable you to validate the field criteria - Code, Description, Price and unit – before continuing with the import (see figure 3).
7. On completion of the import routine, the caption 'Import Complete' will be displayed.

N.B. Future catalogue imports can be performed successfully in the same way, with all the existing information being updated.