

Creating Product Folders When Importing to QuoteWerks

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Description of Issue:

How do I get my parts/items to be imported to Product Folders in QuoteWerks?

Resolution:

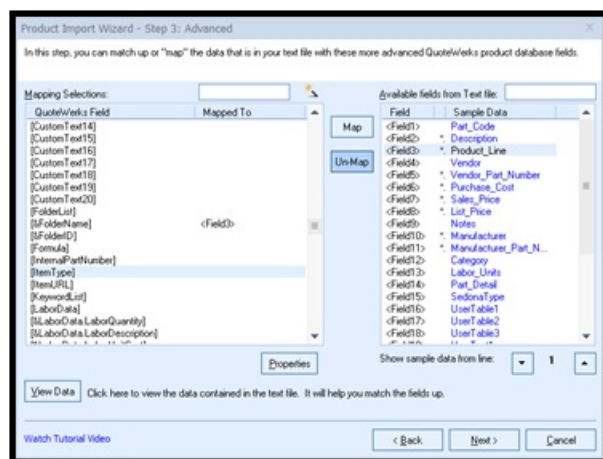
When you do the import of parts/items you have the option to create the product folders in the import.

Before this will work, the import data has to be mapped correctly to tell QuoteWerks what field in the SedonaOffice export file maps to the Product Folder.

In Step 3 of the Import Wizard, there is the advanced mapping screen. Use this screen to select which Sedona field determines the Product Folder.

Click on the [&FolderName] on the QuoteWerks column then click the SedonaOffice fields that relate to the FolderName and click Map.

I used a Product Line in this example.



After this is done click next to move to the next step.

Select the option to Create product folders and the other options for the import based on your procedures.

When the import has finished you should see the Product Folders with the associated items.

If the folder name is not mapped and you select the option to create the product folders, the message below will be displayed.

FolderName field not mapped

You have selected to 'Create Product Folders', but you have not mapped the 'FolderName' field on the Advanced step. Please do this before proceeding.

OK