

Bougheys CSV Export Process

EE Sys has been extended to automate the production of the CSV files that Bougheys need for processing and dispatching Sales Invoices.

There is now an Action which can be run to create the required file, and generate and email to send it. Note the CSV file is created permanently and stored on your computer, so you will have a record of the exact details that were sent to Bougheys by review this file.

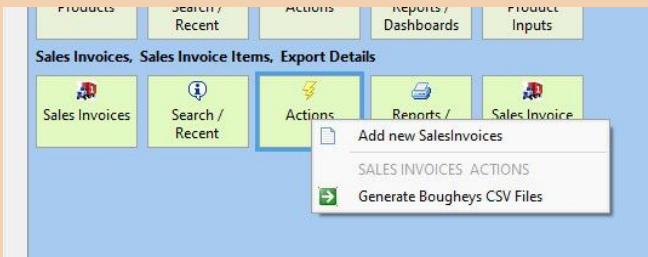
Because EE Sys is multi-locational, it is important to remember that each CSV file is generated using data local to the current user. If a Sales Invoice has been entered on a different computer and it is not yet Uploaded to the current user it will not be included in the CSV File. Also, if two users create the CSV File at the same time it is possible that the same items might appear twice. To avoid this, always runs Updates before and after generating the CSV File to ensure that the changes made to the records you have sent are shared with other users.

Note that the CSV File is added to the "Exports" store on the User's computer, this file will have a file-name in the format:

C:\EE Sys\Database\Stores\Exports\BougheysOrders-EqualExchange-[CurrentDate]-[Number]

If the user wishes to manually edit this file prior to sending it they can. It can be opened directly from the "FileAttachments" section of the "Send mail" page.

To create CSV files, and an automated email for Bougheys, please follow the following steps



SalesInvoices "Generate Bougheys CSV Files" Action

On the System Entities Screen, find the "Sales Invoices" entity, and click "Actions", then click the "Generate Bougheys CSV Files" item.

The screenshot shows a data grid for 'Orders for Bougheys'. The grid has columns for ID, CustomerRef, DateWanted, CustomerComment, PrivateComment, OrgCode, Name, DeliveryLocation, Status, and SourceID. There are four red circles with numbers 1, 2, 3, and 4 pointing to specific elements in the grid.

| ID | CustomerRef | DateWanted | CustomerComment | PrivateComment | OrgCode | Name | DeliveryLocation | Status | SourceID |
|---------------|-------------|------------|-----------------------------|----------------|----------|----------------------------------|---|----------------|-------------------------------------|
| 29487500469 | | 04/01/2022 | | | JWSHRP | One World Shop | | 01 - New Order | |
| 296201406958 | | 19/01/2022 | | | HEALTHST | Health Stores (Wholesale) Ltd | | 01 - New Order | |
| 30129456342 | | 24/01/2022 | | | INDEP810 | Independent 810 Health Foods Ltd | 121 McMillan Way Park Sandhill Lane Lansdown LS 25S | 01 - New Order | |
| 5087916261915 | | 18/01/2022 | Emailed to Boughey 11/11/22 | | ISC | Green City Wholesale | 111 Fleming Street Derby DE1 3PS | 01 - New Order | <input checked="" type="checkbox"/> |
| 57474127405 | | 19/01/2022 | Emailed to Boughey 12/11/22 | | INFBILL | Milly Foods | | 01 - New Order | |
| 574001951291 | | 24/01/2022 | Emailed to Boughey 17/11/22 | | SURMA | Some Wholefoods | | 01 - New Order | |

Orders for Bougheys Rapid Data Entry Grid

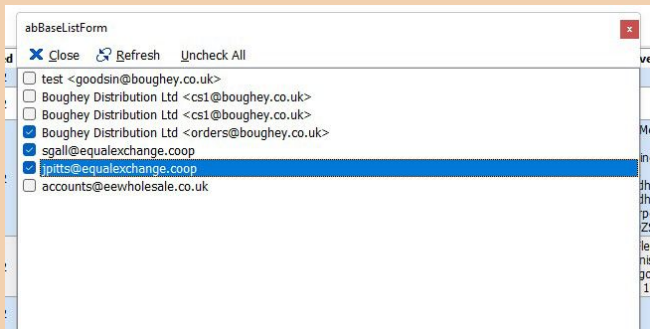
Note that you can double click on any row in the grid to review the order.

The data-grid shown on the left will then open. This shows all Sales Invoices currently on the User's EE Sys with StatusID= "1. New Order" and SourceID = "Bougheys"

1. Note "Send CSV to Bougheys" tick-box column.
2. Tick this column for each of the rows you wish to send to Bougheys now.
3. Please make sure that there is an entry in the "DeliveryAddress" column for all the orders you are sending. If not, add a "Delivery Address" for the relevant customer.
4. Once you are happy you have selected and checked all the records, click "Export CSV"

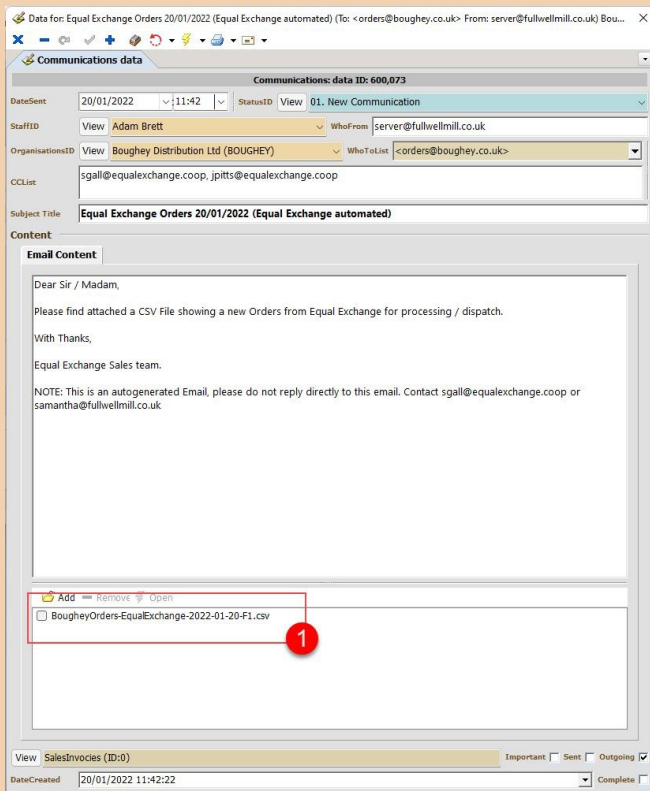
When the Export CSV button is pressed, a database procedure will run which will mark all ticked rows with Status "Picking", and create a CSV file containing all the SalesInvoice and SalesInvoiceItem data needed by Bougheys.

A list of email addresses (for Bougheys, and EE staff) will display,



Select destination email addresses

tick the recipients who should receive the email and CSV File, and click "close".

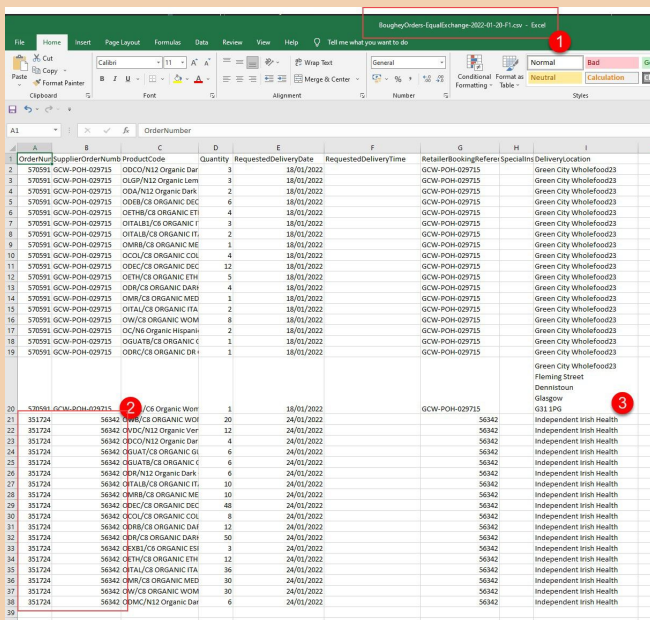


Resulting Email with Linked CSV File

The system will generate an email and show it. Note at 1., in the image a link to the newly created CSV File. If you wish to check the file and possibly edit it prior to sending the email, select it and click the "Open" button.

If you are happy with the email, click on the "Email" button in the tool bar and click the "Send Now" option.

NOTE: Customers must have a "Delivery Address" in EESys for this to be passed on to Bougheys. Bougheys have also requested that all Delivery Addresses include a full, valid Post Code, so please be sure to check this when creating SalesInvoices.



Resulting CSV File in Excel

The resulting CSV File.

1. Note the standard file-name. It begins "BougheysOrders-EqualExchange-", then the date, plus a number, so that if more than 1 file is generated in a day you can see them all. These files can be reviewed if necessary. The files are all stored in the "Exports" store for EESys on the server.
2. Note that there are multiple lines in the CSV file, one for each Product purchased.
3. Note that the Delivery Addresses are exported. Because of word-wrapping this is not easy to see in the CSV file, but the formatting is correctly carried through, so Bougheys should be able to process it.

If the customer has no Delivery Address

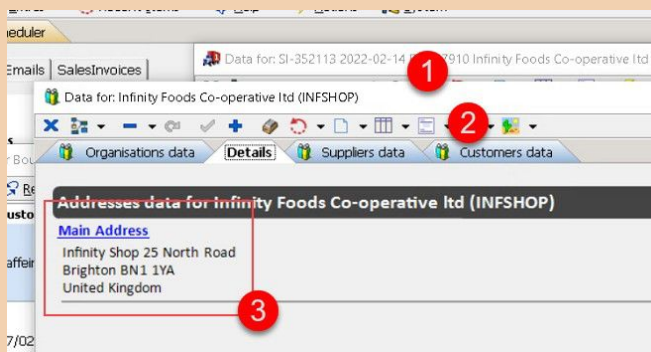
| ID | CustomerRef | Date/Waived | CustomerComment | PrivateComment | OrgCode | Name | DeliveryLocation | Status | Send |
|-------|-------------|-------------|---|----------------|---------|-----------|---|--------------|--------------------------|
| 27954 | Cafelene | 27/01/2022 | Scott Basher Cafelene Magazine 12 Sherwood Way West Wickham BR1 3RS | | | SAMPLES | | 01 New Order | <input type="checkbox"/> |
| 28800 | 07032 | 18/02/2022 | | | | FULLWELL | EE @ Fulwell ME Ltd | 01 New Order | <input type="checkbox"/> |
| 28806 | | 14/02/2022 | | | | HEALTHIES | Infiniti Foods Co-operative Ltd | 01 New Order | <input type="checkbox"/> |
| 28806 | 74402 | 14/02/2022 | | | | HEALTHIES | Unit 5C-E Southwick Industrial Estate Southwick Brighton BN1 1YA | 01 New Order | <input type="checkbox"/> |
| 28813 | 95128 | 15/02/2022 | | | | HEALTHIES | Unit 5C-E Southwick Industrial Estate Southwick Brighton BN1 1YA | 01 New Order | <input type="checkbox"/> |
| 30194 | 40071 | 11/02/2022 | | | | HEALTHIES | Unit 5C-E Southwick Industrial Estate Southwick Brighton BN1 1YA | 01 New Order | <input type="checkbox"/> |
| 30200 | 3302249576 | 11/02/2022 | | | | PREMOSES | PREMOSES | 01 New Order | <input type="checkbox"/> |
| 30210 | 27920 | 14/02/2022 | | | | INFSHOP | Infiniti Foods Co-operative Ltd 25 North Road Brighton BN1 1YA | 01 New Order | <input type="checkbox"/> |

Bougheys Rapid Data Entry with no Delivery Address

When the Bougheys Export Grid is opened, the Delivery Address to which the goods will be sent is shown in the "DeliveryAddress" column.

If this is blank the resulting CSV file will not include a delivery address, and the goods will not be dispatched.

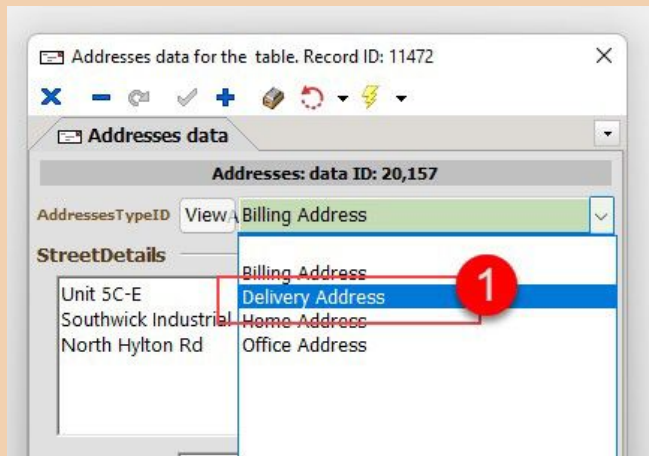
Double click on the rows with no Delivery Address to open this Sales Invoice. Then Click on the "View" button beside the "CustomersID" field. The Edit Window for this customer will open.



Accessing Customer Addresses

1. Open the Customer's Edit Window
2. Click on the "Open Linked Items" button and click "View Addresses"
3. Find the Address entered, and click the blue link to edit it.

If the Customer does not have any addresses stored, add a New Address (click the white "New Items" button, close to "2" in the image, and select "Add New Addresses")



Change "AddressesTypeID" to "Delivery Address"

Once the Addresses Edit Window is open, select "Delivery Address" as the AddressesType as shown in the image at 1.

How do I know which records have been processed and added to the CSV Files for Boughey's attention?

In EESys each Sales Invoice has a "StatusID". When the "Generate Bougheys CSV Files" Action is clicked EESys looks for all Sales Invoices with StatusID = "1. New Order" (ID-10779) and SourceID = Bougheys. These records are presented in the Grid.

When The "Export to CSV" button is clicked, each row in the grid which the user has ticked is updated and set to StatusID = "2. Picking" (ID-17780). These are the "newly processed" Boughey's orders. A database procedure then runs which generates the CSV File for all Sales Invoices that have been ticked. Unticked

Sales Invoices remain with StatusID = "1. New Order", and are not processed.

Sales Invoices with StatusID = "2. Picking" from a previous update are not added to the CSV File. Only those ticked in the Grid during the CSV File Generation are processed.

During the CSV File Generation, every Order added to the CSV File has a record added to its EditHistory detailing the exact time that the CSV File was generated, and the code "NIS" added to indicate the procedure that has been called. If you want to be sure that a Sales Invoice has been sent to Bougheys as a CSV file, open that Sales Invoice's EditHistory page and check for a record with ChangeType="NIS", if none is present, the record has not been processed.