

**32 SOFT**  
**DATA LOADERS**  
*Productivity Solutions for QAD ERP*

## **1.4.1 Item Master Data Loader User Guide**



# 1.4.1 Item Master Data Loader User Guide

Thank you for your interest in 32 Soft’s productivity solutions for QAD. You are on the path to improved data management and productivity.


This User Guide will show you how to set up and use the 1.4.1 Item Master Data Loader.

## Contents

Set Up.....	2
Maintaining Item Records.....	3
Creating new records.....	6
Error Checking.....	7
Have Questions? Contact Us.....	7

### DATA LOADERS

We have dozens of  
**DATA LOADERS**  
for every major QAD process

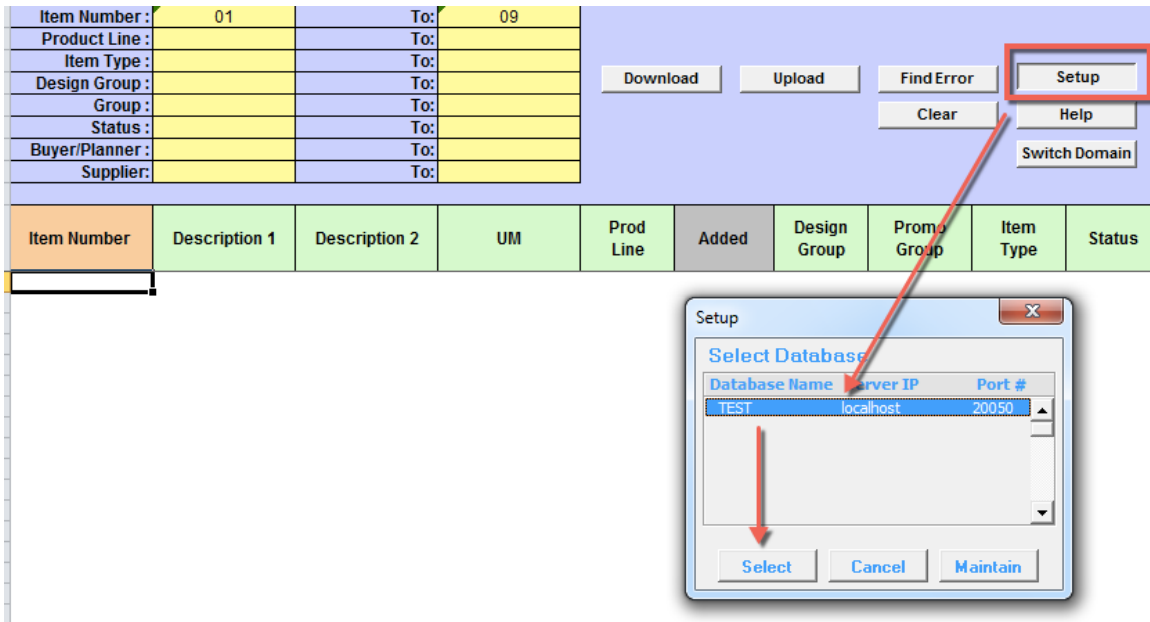
-  Master Data & Inventory
-  Distribution & Supply Chain
-  Finance
-  Production

To browse a complete list of Data Loaders, [click here](#).

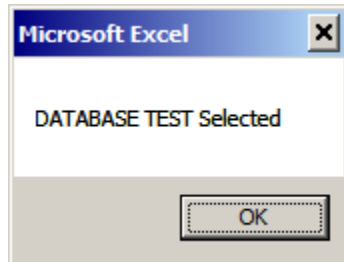
# 1.4.1 Item Master Data Loader User Guide

## Set Up

1. Open up the Loader and check that correct database is set up. Click on the [SETUP] button to open the window and highlight the correct database. Click on [SELECT] when done.



- A pop up window will be displayed showing the available databases from which to select.
- Highlight the desired database and click on the [SELECT] button
- A message will be displayed showing the database you selected. Click [OK] to continue.



## Maintaining Item Records

1. You can use this Data Loader to maintain existing item records or create new item records by entering the search criteria in the yellow highlighted fields.

Item Number	Description 1	Description 2	UM	Prod Line	Added	Design Group	Promo Group	Item Type	Status
Item Number :	01		To:	09					
Product Line :			To:						
Item Type :			To:						
Design Group :			To:						
Group :			To:						
Status :			To:						
Buyer/Planner :			To:						
Supplier :			To:						

Download Upload Find Error Setup  
Clear Help  
Switch Domain

### Search parameters are available for the following fields:

- **Item:** enter range of Items or leave blank for all
  - **Product Line:** enter range of Product Lines or leave blank for all
  - **Item Type:** enter range of Item Types or leave blank for all
  - **Design Group:** enter range of Design Groups or leave blank for all
  - **Group:** enter range of Groups or leave blank for all
  - **Status:** enter range of Status or leave blank for all
  - **Buyer/Planner:** enter range of Buyer/Planner codes or leave blank for all
  - **Supplier:** enter range of Supplier codes or leave blank for all
2. Once the Search parameters are entered, select the [DOWNLOAD] button.
    - When Action buttons are selected for the first time, a pop up window will be displayed for the user log in. The User ID is validated against QAD. Use your QAD user ID and password.

Item Number	Description 1	Description 2	UM	Prod Line	Added	Design Group	Promo Group	Item Type	Status
Item Number :	01		To:	09					
Product Line :			To:						
Item Type :			To:						
Design Group :			To:						
Group :			To:						
Status :			To:						
Buyer/Planner :			To:						
Supplier :			To:						

Can't login: User ID does not exist

Download Upload Find Error Setup  
Clear Help  
Switch Domain

QAD login

User ID: qaduser

Password:

Domain: QP

Login Cancel

- Enter your QAD User ID, Password and Domain
- Select [LOGIN] button to continue.

**Please note:** if the provided credentials are incorrect or the user is not authorized to use the transactions in menu 1.4.1 in QAD, the database connection will not be established and the QAD login window will reappear.

- The Data Loader will display data based on the search criteria. A message will indicate whether a download was successful or not:

Item Number:	01	To:	09	Downloaded Successfully from eB21SP5 QP									
Product Line:		To:											
Item Type:		To:											
Design Group:		To:											
Group:		To:											
Status:		To:											
Buyer/Planner:		To:											
Supplier:		To:											

Item Number	Description 1	Description 2	UM	Prod Line	Added	Design Group	Promo Group	Item Type	Status	Group	Drawing	Rev	Drawing loc	Size	Price Break Category	Abc	Lot
02-0001	CONFIGURED DISPL		EA	1000	02/27/2004		PG1	CONFIG	AC	CARDED		1		1			A
02-0001-A	CONFIGURED DISPL		EA	1000	05/31/2016		PG1	CONFIG	AC	CARDED		1		1			A
02-0005	MECHANICAL PENCIL (5MM) BLISTER PACI		EA	1000	02/27/2004		PG1	FINGOOD	AC	AUTO				2			A
02-0005-A	MECHANICAL PENCIL (5MM) BLISTER PACI		EA	1000	05/31/2016		PG1	FINGOOD	AC	AUTO				2			A
02-0009	Packaged Pen		EA	6000	06/01/2001		PG1	FINGOOD	AC	MILK				1			A
02-0009-A	Packaged Pen		EA	6000	05/31/2016		PG1	FINGOOD	AC	MILK				1			A
02-0010	ERASER REFILL PAC		EA	6000	02/27/2004			FINGOOD	AC	CARDED				1			A
02-0020	LEAD REFILL PACK		EA	1000	02/27/2004			FINGOOD	AC	CARDED				1			A
03-0030	DISPLAY RACK		EA	1000	02/27/2004			FINGOOD	AC	FAB				1			A
0300000	Unit, Transaxle Aux Drive		EA	1000	05/12/2001			eqss	ac	AUTO				1			A
0300001	Axle, Integral Arm St		EA	1000	05/12/2001			eqss	ac	MILK				1			A
0300002	Filter, Air		EA	1000	05/12/2001			eqss	ac	MILK				1			A
0300003	Filter, Coolant		EA	1000	05/12/2001			eqss	ac	MILK				1			A
04-0009	Assembled Pen		EA	6000	06/01/2001		PG1	FINGOOD	AC	MILK				1			A
05-005	Barrel		EA	6000	06/01/2001			FINGOOD	AC	MILK		a		1			A
05-0079	Ink Cart. 50 ML		EA	6000	06/01/2001		PG1	FINGOOD	AC	MILK		b		1			A
05-0095	Pen Cap		EA	6000	06/01/2001		PG1	FINGOOD	AC	MILK		c		1			A
05-0579	Prototype Ink Cart.HC		EA	6000	06/01/2001		PG1	FINGOOD	AC	MILK		d		1			A

- Columns highlighted in green are writable.
- Columns highlighted in grey are read-only.

3. Analyze the data and make your changes in the green highlighted columns:

Item Number:	01	To:	09	Downloaded Successfully from eB21SP5 QP									
Product Line:		To:											
Item Type:		To:											
Design Group:		To:											
Group:		To:											
Status:		To:											
Buyer/Planner:		To:											
Supplier:		To:											

Item Number	Description 1	Description 2	UM	Prod Line	Added	Design Group	Promo Group	Item Type	Status	Group	Drawing	Rev	Drawing loc	Size	Price Break Category	Abc	Lot
02-0005-A	MECHANICAL PENCIL (5MM) BLISTER PACI		EA	1000	05/31/2016		PG1	FINGOOD	AC	AUTO				2			A
02-0009	Packaged Pen		EA	6000	06/01/2001		PG1	FINGOOD	AC	MILK				1			A
02-0009-A	Packaged Pen		EA	6000	05/31/2016		PG1	FINGOOD	AC	MILK				1			A
02-0010	ERASER REFILL PAC		EA	6000	02/27/2004			FINGOOD	AC	CARDED				1			A
02-0020	LEAD REFILL PACK		EA	1000	02/27/2004			FINGOOD	AC	CARDED				1			A
03-0030	DISPLAY RACK		EA	1000	02/27/2004			FINGOOD	AC	FAB				1			A
0300000	Unit, Transaxle Aux Drive		EA	1000	05/12/2001			eqss	ac	AUTO				1			A
0300001	Axle, Integral Arm St		EA	1000	05/12/2001			eqss	ac	AUTO				1			A
0300002	Filter, Air		EA	1000	05/12/2001			eqss	ac	AUTO				1			A
0300003	Filter, Coolant		EA	1000	05/12/2001			eqss	ac	AUTO				1			A
04-0009	Assembled Pen		EA	6000	06/01/2001		PG1	FINGOOD	AC	MILK				1			A
05-005	Barrel		EA	6000	06/01/2001			FINGOOD	AC	MILK		a		1			A
05-0079	Ink Cart. 50 ML		EA	6000	06/01/2001		PG1	FINGOOD	AC	MILK		b		1			A
05-0095	Pen Cap		EA	6000	06/01/2001		PG1	FINGOOD	AC	MILK		c		1			A
05-0579	Prototype Ink Cart.HC		EA	6000	06/01/2001		PG1	FINGOOD	AC	MILK		d		1			A

- When you are finished entering data, select the [UPLOAD] button and the status will be displayed in a pop up window with a message.

The screenshot shows the QAD Item Master Maintenance interface. At the top, there are input fields for Item Number (01), Product Line, Item Type, Design Group, Group, Status, Buyer/Planner, and Supplier. A 'Loaded Successfully to eB21SP5 QP' message is displayed. Below these fields are buttons for Download, Upload (highlighted with a red box), Find Error, Setup, Clear, Help, and Switch Domain. A table of item records is visible below, with columns for Item Number, Description 1, Description 2, UM, Prod Line, Added, Design Group, Promo Group, Item Type, Status, Group, Drawing, and Rev. A status pop-up window is overlaid on the table, showing a list of rows being processed (rows 22 through 28) and the message 'LOADED SUCCESSFULLY'. The pop-up window also includes a '32Soft Inc.' logo and a 'Close' button.

**Note:** Item records changes have been updated in the Item Master Maintenance screen in QAD (1.4.1)

The screenshot shows the QAD Item Master Maintenance screen for item 02-0010. The title bar indicates 'ppptmt.p b+' and '1.4.1 Item Master Maintenance' with a date of '04/05/17'. The main display shows the following information:

- Item Number: 02-0010
- Description: ERASER REFILL PACK
- Unit of Measure: EA

The 'Item Data' section shows:

- Prod Line: 1000 (highlighted with a red box)
- Item Type: FINGOOD
- Drawing:
- Added: 02/27/04
- Status: AC
- Revision:
- Design Group:
- Group: CARDED
- Drawing Loc:
- Size: 1
- Promo Group:
- Price Break Category:

The 'Item Inventory Data' section shows:

- ABC Class: A
- Average Interval: 90
- Lot/Serial Control:
- Cycle Count Interval: 120
- Site: 10000
- Shelf Life:
- Location: 200
- Allocate Single Lot: No
- Location Type:
- Key Item: No
- Auto Lot Numbers: No
- PO Receipt Status:
- Active: No
- Lot Group:
- WO Receipt Status:
- Active: No
- Article Number:

## Creating New Records

1. New records can be created by downloading existing records and copying main attributes or entering data manually.

Item Number	Description 1	Description 2	UM	Prod Line	Added	Design Group	Promo Group	Item Type	Status	Loc Type	Auto Lot	Lot Group	Article	Avg Int	Cycle Count	Shelf Life	Allocate Single Lot	Key Item
02-0010	ERASER REFILL PAC		EA	1000	02/27/2004			FINGOOD	AC		no			90	120		0 no	no
02-0015	INK REFILL PACK		EA	1000				FINGOOD	AC		no			90	120		0 no	no

- As this is an Excel spreadsheet, it will have all standard Excel functionality. You can easily delete the lines where no change is required so you will have a better visibility of the orders. You can also copy a line containing an existing item into a new line to create a new item in the database. This way you only have to change the item number, description and the fields that should be different for the new item.

2. Once all lines have been completed, select the [UPLOAD BUTTON] to update QAD and create a new item record.

The screenshot shows the software interface with the 'Upload' button highlighted. Below it, a terminal window displays the following information:

```

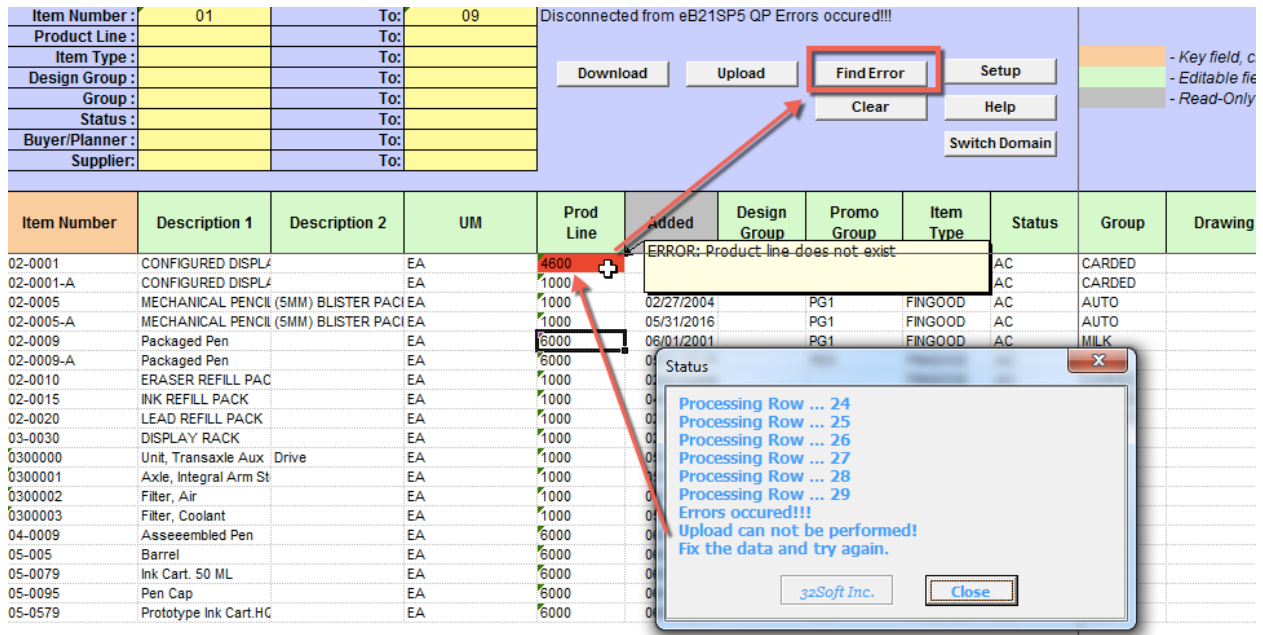
mfg@amz32: ~ - PuTTY with 32Printer
ppptmt.p b+ 1.4.1 Item Master Maintenance 04/05/17

Item Number: 02-0015 Description: INK REFILL PACK
Unit of Measure: EA

Item Data
Prod Line: 1000 Item Type: FINGOOD Drawing:
Added: 04/05/17 Status: AC Revision:
Design Group: Group: CARDED Drawing Loc: Size: 1
Promo Group: Price Break Category:
  
```

## Error Checking

1. When you upload to QAD, a window pops up indicating the status of the upload. If there is an error, you will receive an indication and the cell with the error is highlighted in red. If you mouse over the cell, it will display the reason for the error.



The screenshot displays the QAD data loader interface. At the top, there are fields for Item Number (01), Product Line, Item Type, Design Group, Group, Status, Buyer/Planner, and Supplier. A 'Find Error' button is highlighted in red. Below this is a data table with columns: Item Number, Description 1, Description 2, UOM, Prod Line, Added, Design Group, Promo Group, Item Type, Status, Group, and Drawing. The 'Prod Line' column has a red cell with the value '4600'. A tooltip over this cell displays the error message: 'ERROR: Product line does not exist'. A status dialog box is open, showing the following text: 'Processing Row ... 24', 'Processing Row ... 25', 'Processing Row ... 26', 'Processing Row ... 27', 'Processing Row ... 28', 'Processing Row ... 29', 'Errors occurred!!!', 'Upload can not be performed!', 'Fix the data and try again.' The dialog box has buttons for '32Soft Inc.' and 'Close'.

- You can use the [Find Error] button to navigate between cells with errors.
- You must correct the error before uploading again. If there is error in one cell, no records are uploaded.

## Have Questions? Contact Us.

Now that you know everything is set-up correctly, you are on your way to a more productive QAD experience with Data Loaders! Thank you for your interest.

If you have any questions or need additional help, please do not hesitate to [contact](#) us.