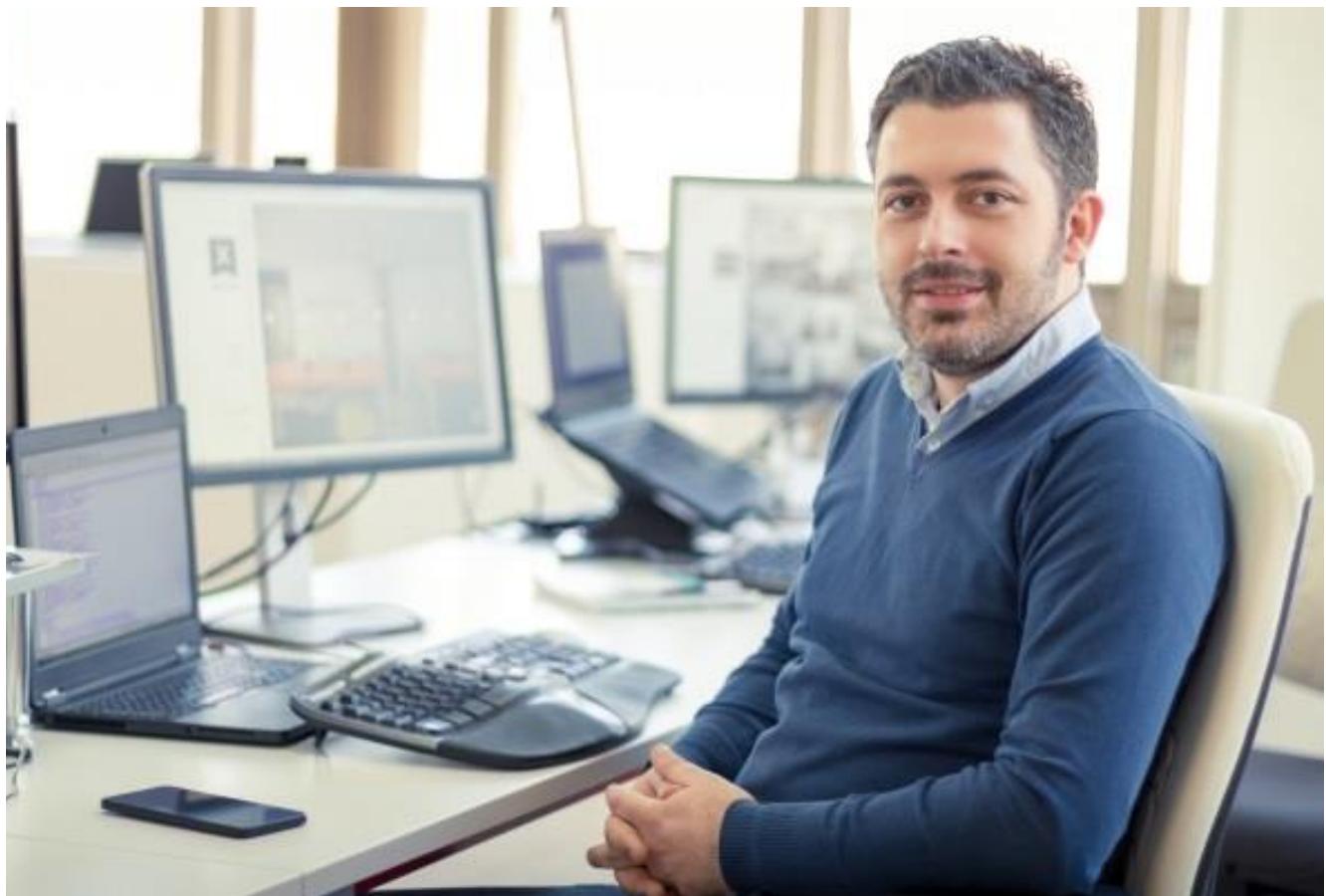




2.1.1 Customer Maintenance Data Loader User Guide



2.1.1 Customer Maintenance 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 2.1.1 Customer Maintenance Data Loader.

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DATA LOADERS

We have dozens of
DATA LOADERS
for every major QAD process

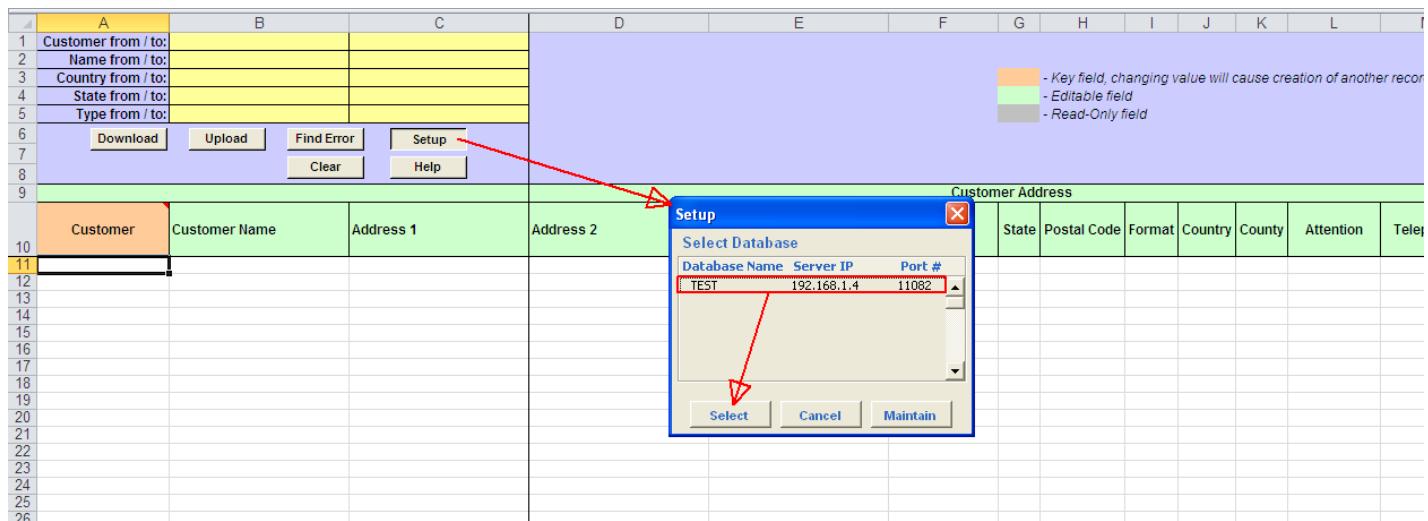
-  Master Data &
Inventory
-  Distribution &
Supply Chain
-  Finance
-  Production

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

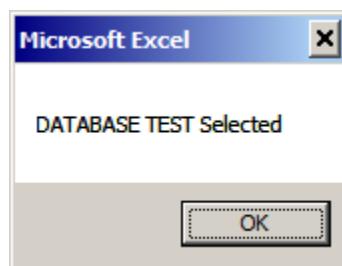
2.1.1 Customer Maintenance User Guide

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



Downloading Data from QAD

1. You can use this Loader to maintain existing customer records by entering the search criteria in the yellow highlighted fields.

The screenshot shows a Microsoft Excel spreadsheet titled "Customer Address". At the top left, there is a form with several input fields: "Customer from / to:", "Name from / to:", "Country from / to:", "State from / to:", and "Type from / to:". Below this form is a row of buttons: "Download", "Upload", "Find Error", "Setup", "Clear", and "Help". To the right of the buttons, there is a legend with three entries: a yellow square labeled "- Key field, changing value will cause creation of another record in 2.1.1", a green square labeled "- Editable field", and a grey square labeled "- Read-Only field". The main body of the spreadsheet is titled "Customer Address" and contains a table with columns for Customer, Customer Name, Address 1, Address 2, Address 3, City, State, Postal Code, Format, Country, County, Attention, Telephone, and Extension. Row 10 is a header row, and row 11 contains data. Rows 12 through 22 are empty.

Search parameters are available for the following fields:

- Customer from/to - enter existing customer numbers to filter by customer number range
- Name from/to – enter customer name range
- Country from/to – specify range of countries, if left blank no filter will be applied on country code field
- State from/to – specify range of states, if left blank no filter will be applied to state field
- Type from/to – specify range of customer types, if left blank no filter will be applied on the customer type field

2. Once 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 user log in. User ID is validated against QAD. Use your QAD user ID and password.

The screenshot shows the same Excel spreadsheet as above. A red arrow points from the "Customer" column header in the main table to a "QAD login" dialog box. The dialog box has fields for "User ID" (qaduser), "Password" (left empty), and "Domain" (QP). It also has "Login" and "Cancel" buttons. The rest of the spreadsheet and its legend are visible.

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

Please note: if provided credentials are incorrect or the user is not authorized to manage customers in menu 2.1.1 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 or not a download was successful:

| A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | | | |
|---------------------|------------------------------|------------------------------|---|------------------------|---------------|--------|-------------|--------|---------|--------|---------------|----------------|-----------|-------------|--|--|--|
| Customer from / to: | | | Downloaded Successfully from QAD2009 QP at 5/2/2017 12:50:59 PM | | | | | | | | | | | | | | |
| Name from / to: | | | | | | | | | | | | | | | | | |
| Country from / to: | USA | USA | | | | | | | | | | | | | | | |
| State from / to: | | | | | | | | | | | | | | | | | |
| Type from / to: | | | | | | | | | | | | | | | | | |
| Download | Upload | Find Error | Setup | Clear | Help | | | | | | | | | | | | |
| Customer Address | | | | | | | | | | | | | | | | | |
| Customer | Customer Name | Address 1 | Address 2 | Address 3 | City | State | Postal Code | Format | Country | County | Attention | Telephone | Extension | Fax | | | |
| 11 00010000 | University of Cal - Ship To | 1BriarLane | test1 | LosAngeles | CA | 90036 | 0 usa | | | | | | | | | | |
| 12 00010002 | Consigned Inventory Customer | No Intransit Locations | test3 | Chicago | IL | 60195 | 0 USA | | | | | | | | | | |
| 13 00010003 | Toy Company of America | 17621HamlinStreet | Buildig4A | VanNuys | CA | 91406 | 0 USA | | | | William | | | | | | |
| 14 00010005 | Consigned Inventory Customer | Intransit Location | test4 | Albany | NY | 990099 | 0 USA | | | | | | | | | | |
| 15 00010006 | Customer | 1212 Customer St | | New York | NY | 21111 | 0 USA | | | | | | | | | | |
| 16 00011111 | UCIrvine | 100 University Dr | | Irvine | CA | 90887 | 0 USA | | | | | | | | | | |
| 17 00050004 | Spare Parts Warehouse | | | MI | | | 0 USA | | | | | | | | | | |
| 18 01000000 | Colossal Conglomerates LTD | Suite 1000 Colossal Building | Colossal Industrial Park | 15000 Production Drive | Evanston | IL | 090876 | | | | Bertha Blaise | 1-800-333-9000 | 666 | | | | |
| 19 01000006 | Test | | | | | | 0 USA | | | | | | | | | | |
| 20 01000007 | TEST | | | | | | 0 USA | | | | | | | | | | |
| 21 01000009 | Sample SSM Customer | | | | | | 0 USA | | | | | | | | | | |
| 22 00000000 | Lowrance | 12000 Skelly Ave | | Carpinteria | CA | 93013 | 0 USA | | | | | | | | | | |
| 23 10010000 | CENTURY HALLMARK | Attention: Accounts Payable | 300000020 Century Blvd | P.O. Box 675 | Tulsa | OK | 782806 | | | | | | | | | | |
| 24 10010001 | Westwood Reliable | Westwood Shopping Center | 77 Sunset Strip | Block B-2 | Anaheim | CA | 99029 | 0 USA | 001 | 001 | Rosetta Stone | 213-923-0293 | | | | | |
| 25 10010003 | Reliable Center | Central Avenue Shops | 27002 Central Ave. | Suite 202 | New York | NY | 02929 | 0 USA | | | Sally Manders | | | | | | |
| 26 10010004 | Gateway Reliable | Gateway Center | 709 Bridge Street | | San Francisco | CA | 92838 | 0 USA | | | Johnny Walker | 714-293-0293 | | | | | |
| 27 10040000 | Worldwide Supply | | 8000 Central Avenue | | Kansas City | MI | 748802 | 0 USA | | | James | 313-932-0239 | | 313-932-002 | | | |

- Columns highlighted in orange (see legend) are key fields
- Columns highlighted in green are writable.
- Columns highlighted in grey are read-only.

Changing Existing Customer Records

- Change the values in the fields where necessary. All the fields with green headers are updatable fields, so you can change the values.
- Since this is an Excel sheet, it will have all standard Excel functionalities. You can easily delete the lines where no changes are required to give you better visibility.

| A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | | | |
|---------------------|------------------------------|------------------------------|---|------------------------|---------------|--------|-------------|--------|---------|--------|---------------|----------------|-----------|-------------|--|--|--|
| Customer from / to: | | | Downloaded Successfully from QAD2009 QP at 5/2/2017 12:50:59 PM | | | | | | | | | | | | | | |
| Name from / to: | | | | | | | | | | | | | | | | | |
| Country from / to: | USA | USA | | | | | | | | | | | | | | | |
| State from / to: | | | | | | | | | | | | | | | | | |
| Type from / to: | | | | | | | | | | | | | | | | | |
| Download | Upload | Find Error | Setup | Clear | Help | | | | | | | | | | | | |
| Customer Address | | | | | | | | | | | | | | | | | |
| Customer | Customer Name | Address 1 | Address 2 | Address 3 | City | State | Postal Code | Format | Country | County | Attention | Telephone | Extension | Fax | | | |
| 11 00010000 | University of Cal - Ship To | 1BriarLane | TEST123 | TEST ADDRESS 3 | LosAngeles | CA | 90036 | 0 usa | | | | | | | | | |
| 12 00010002 | Consigned Inventory Customer | No Intransit Locations | test3 | Chicago | IL | 60195 | 0 USA | | | | | | | | | | |
| 13 00010003 | Toy Company of America | 17621HamlinStreet | Buildig4A | VanNuys | CA | 91406 | 0 USA | | | | William | | | | | | |
| 14 00010005 | Consigned Inventory Customer | Intransit Location | test4 | Albany | NY | 990099 | 0 USA | | | | | | | | | | |
| 15 00010006 | Customer | 1212 Customer St | TEST ADDR2 | TESTADDR3 | New York | NY | 21111 | 0 USA | | | | | | | | | |
| 16 00011111 | UCIrvine | 100 University Dr | | Irvine | CA | 90887 | 0 USA | | | | | | | | | | |
| 17 00050004 | Spare Parts Warehouse | | | | | | 0 USA | | | | | | | | | | |
| 18 01000000 | Colossal Conglomerates LTD | Suite 1000 Colossal Building | Colossal Industrial Park | 15000 Production Drive | Evanston | IL | 090876 | 0 USA | | | Bertha Blaise | 1-800-333-9000 | 666 | | | | |
| 19 01000006 | Test | | | | | | 0 USA | | | | | | | | | | |
| 20 01000007 | TEST | | | | | | 0 USA | | | | | | | | | | |
| 21 01000009 | Sample SSM Customer | | | | | | 0 USA | | | | | | | | | | |
| 22 00000000 | Lowrance | 12000 Skelly Ave | | Carpinteria | CA | 93013 | 0 USA | | | | | | | | | | |
| 23 10010000 | CENTURY HALLMARK | Attention: Accounts Payable | 300000020 Century Blvd | P.O. Box 675 | Tulsa | OK | 782806 | 0 USA | | | | | | | | | |
| 24 10010001 | Westwood Reliable | Westwood Shopping Center | 77 Sunset Strip | Block B-2 | Anaheim | CA | 99029 | 0 USA | 001 | 001 | Rosetta Stone | 213-923-0293 | | | | | |
| 25 10010003 | Reliable Center | Central Avenue Shops | 27002 Central Ave. | Suite 202 | New York | NY | 02929 | 0 USA | | | Sally Manders | | | | | | |
| 26 10010004 | Gateway Reliable | Gateway Center | 709 Bridge Street | | San Francisco | CA | 92838 | 0 USA | | | Johnny Walker | 714-293-0293 | | | | | |
| 27 10040000 | Worldwide Supply | | 8000 Central Avenue | | Kansas City | MI | 748802 | 0 USA | | | James | 313-932-0239 | | 313-932-002 | | | |

3. Once you have reviewed the data, please select the [UPLOAD] button to upload the changes into QAD.

The screenshot shows a Microsoft Excel spreadsheet with data in columns A through O. The first few rows contain header information and field descriptions. A status window titled "Status" is overlaid on the spreadsheet, showing processing progress from row 64 to 70, and a message indicating the data has been loaded successfully. The status window includes a "Close" button and the 32Soft Inc. logo.

| | A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | | | | | | | | | | | | | |
|----|---------------------|------------------------------|------------------------------|---|------------------------|-----------------------|--------|-----------|-----------|-----------|-----|---|---|---|---|--|--|--|--|--|--|--|--|--|--|--|--|--|
| 1 | Customer from / to: | | | Loaded Successfully to QAD2009 QP | | | | | | | | | | | | | | | | | | | | | | | | |
| 2 | Name from / to: | | | - Key field, changing value will cause creation of another record in 2.1.1 - Editable field - Read-Only field | | | | | | | | | | | | | | | | | | | | | | | | |
| 3 | Country from / to: | USA | USA | | | | | | | | | | | | | | | | | | | | | | | | | |
| 4 | State from / to: | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 5 | Type from / to: | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 6 | Download | Upload | Find Error | Setup | | | | | | | | | | | | | | | | | | | | | | | | |
| 7 | | | Clear | Help | | | | | | | | | | | | | | | | | | | | | | | | |
| 8 | Customer Addresses | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 9 | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 10 | Customer | Customer Name | Address 1 | Address 2 | Address 3 | Status | County | Attention | Telephone | Extension | Fax | | | | | | | | | | | | | | | | | |
| 11 | 00010000 | University of Cal - Ship To | 1BriarLane | TEST123 | TEST ADDRESS 3 | Processing Row ... 64 | | | | | | | | | | | | | | | | | | | | | | |
| 12 | 00010002 | Consigned Inventory Customer | No Intransit Locations | test3 | | Processing Row ... 65 | | | | | | | | | | | | | | | | | | | | | | |
| 13 | 00010003 | Toy Company of America | 17621HamlinStreet | Buildig4A | test4 | Processing Row ... 66 | | | | | | | | | | | | | | | | | | | | | | |
| 14 | 00010005 | Consigned Inventory Customer | Intransit Location | | | Processing Row ... 67 | | | | | | | | | | | | | | | | | | | | | | |
| 15 | 00010006 | Customer | 1212 Customer St | TEST ADDR2 | TESTADDR3 | Processing Row ... 68 | | | | | | | | | | | | | | | | | | | | | | |
| 16 | 00011111 | UCIrvine | 100 University Dr | | | Processing Row ... 69 | | | | | | | | | | | | | | | | | | | | | | |
| 17 | 00050004 | Spare Parts Warehouse | | | | Processing Row ... 70 | | | | | | | | | | | | | | | | | | | | | | |
| 18 | 01000000 | Colossal Conglomerates LTD | Suite 1000 Colossal Building | Colossal Industrial Park | 15000 Production Drive | Loading Customers... | | | | | | | | | | | | | | | | | | | | | | |
| 19 | 01000006 | Test | | | | LOADED SUCCESSFULLY | | | | | | | | | | | | | | | | | | | | | | |
| 20 | 01000007 | TEST | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 21 | 01000009 | Sample SSM Customer | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 22 | 100000 | Lowrance | 12000 Skelly Ave | | | | | | | | | | | | | | | | | | | | | | | | | |
| 23 | 1001000 | CENTURY HALLMARK | Attention: Accounts Payable | 300000020 Century Blvd | P.O. Box 675 | | | | | | | | | | | | | | | | | | | | | | | |
| 24 | 10010001 | Westwood Reliable | Westwood Shopping Center | 77 Sunset Strip | Block B-2 | | | | | | | | | | | | | | | | | | | | | | | |
| 25 | 10010003 | Reliable Center | Central Avenue Shops | 27002 Central Ave. | Suite 202 | | | | | | | | | | | | | | | | | | | | | | | |
| 26 | 10010004 | Gateway Reliable | Gateway Center | 709 Bridge Street | | | | | | | | | | | | | | | | | | | | | | | | |
| 27 | 1004000 | Worldwide Supply | | 8000 Central Avenue | | | | | | | | | | | | | | | | | | | | | | | | |
| 28 | 10000000 | Universal Industries | 710 S. Fairmount Ave | | | | | | | | | | | | | | | | | | | | | | | | | |

- The LOADED SUCCESSFULLY message means all the data was uploaded into QAD successfully.
- If the status window displays some different message, please read the Error Checking section of this document.

Adding New Customers to QAD

1. There are two ways to add new customers to QAD with this Data Loader. You can manually type in all the required fields for the new customer. Or, you can copy/paste the data from an existing customer to create a new customer record, and then change the appropriate fields.

2. If you copy/paste an existing customer to create a new customer, do not forget to change the customer number in the first column as that is the unique identifier for each customer.

3. Once you have reviewed the data, please select the [UPLOAD] button to upload the changes into QAD.

- The LOADED SUCCESSFULLY message means all the data was uploaded into QAD successfully.
 - If the status window displays a different message, please read the Error Checking section of this document.

Error Checking

- When you upload to QAD, a pop up window will indicate the status of the upload. If there is an error, the cell with the error will be highlighted in red. If you hover over the cell, the reason for the error will be displayed.

The screenshot shows a QAD application interface with a grid of customer data. A red arrow points from the 'Find Error' button in the toolbar to a specific cell in the grid, which is highlighted in red. A red box surrounds this cell, and a larger red box encloses the entire error dialog box. The dialog box has a title 'Status' and contains the message 'Errors occurred!!! Upload can not be performed! Fix the data and try again.' It also features a '32Soft Inc.' logo and a 'Close' button.

| A | B | C | AK | AL | AM | AN | AO | AP | AQ | AR | AS | AT | AU | AV | |
|---------------------|--|-----------------------------|-------------|----------------|-------------|-------|-----|------------|--------------------------|-----------|----------------------------------|--------------|-------|-------------|------|
| Customer from / to: | | | | | | | | | | | | | | | |
| Name from / to: | | | | | | | | | | | | | | | |
| Country from / to: | USA | USA | | | | | | | | | | | | | |
| State from / to: | | | | | | | | | | | | | | | |
| Type from / to: | | | | | | | | | | | | | | | |
| Download | Upload | Find Error | Setup | Clear | Help | | | | | | | | | | |
| Customer Data | | | | | | | | | | | | | | | |
| Customer | Customer Name | Address 1 | Price Table | Discount Table | Fixed Price | Class | SIC | Partial OK | Invoice by Authorization | Time Zone | Capture Self-Billing Information | Credit Limit | Terms | Credit Hold | Cred |
| 21 1000009 | Sample SSM Customer | 12000 Skelly Ave | | | yes | \$0 | yes | no | PST/PDT | no | \$ 1,000,000.00 | 30 | no | H | |
| 22 10000 | Lowrance | Attention: Accounts Payable | | | yes | | yes | no | EST | no | | | | | |
| 23 1001000 | CENTURY HALLMARK | Westwood Shopping Center | | 10 | yes | 1 | yes | no | PST/PDT | no | | | | | |
| 24 10010001 | Westwood Reliable | Central Avenue Shops | | 10 | yes | 1 | yes | no | PST/PDT | no | | | | | |
| 25 10010003 | Reliable Center | Gateway Center | | 10 | yes | 1 | yes | no | PST/PDT | no | | | | | |
| 26 10010004 | Gateway Reliable | Gateway Center | | 20 | yes | 1 | no | no | PST/PDT | no | \$ 15,000.00 | 10 | yes | 3 | |
| 27 1004000 | Worldwide Supply | | | 10 | yes | 1 | yes | no | PST/PDT | no | \$ 37,500.00 | 2/10-30 | yes | 9 | |
| 28 1005000 | Universal Industries | 719 S. Driftwood Ave. | | 10 | yes | 1 | yes | no | | | \$ 0.00 | 2/10-30 | no | | |
| 29 1006000 | Sterling Industries | 2000 Broadway | | | yes | 1 | yes | no | | | \$ 0.00 | 2/10PRO | no | | |
| 30 1007000 | Supply Warehouse | Central Distribution Center | | 10 | yes | 1 | yes | no | | | \$ 0.00 | 2/10-30 | no | | |
| 31 1008000 | Custom Homes and Buildings | 2670 Tenth Street | | | yes | 1 | yes | no | | | \$ 0.00 | 2/10-30 | no | | |
| 32 1009000 | EnviroCar | Reusable Resources Complex | | | yes | 1 | yes | no | | | \$ 0.00 | 2/10-30 | no | | |
| 33 1012000 | Products Warehouse | Central Supply Division | | 10 | yes | 1 | yes | no | | | \$ 0.00 | 2/10-30 | no | | |
| 34 20010001 | Anaheim Plaza Hotel | 67 Harbor Blvd. | | | yes | 1 | yes | no | | | \$ 0.00 | no | | | |
| 35 302 | test | test | | | yes | | yes | no | | | | | | | |
| 36 505 | Favorite Supplier | 333 Peachtree Street NE | | | no | 1 | yes | no | | | \$ 0.00 | 30 | no | cr rat | |
| 37 555 | Favorite Customer | 333 Peachtree Street NE | | | yes | 1 | yes | no | | | \$ 0.00 | 30 | no | ccrate | |
| 38 7777777 | DUMMY RECORD FOR STANDING QUOTES/PROMOTIONS/CALL-IN | | | | yes | 1 | yes | no | | | | | | | |
| 39 8888888 | MISCELLANEOUS CUSTOMER (USED BY ACCOUNTS RECEIVABLE) | | | | yes | 1 | yes | no | | | | | | | |
| 40 90000001 | Summerland Sports Leagues | 1234 My Street | | | yes | 2 | yes | no | | | \$ 0.00 | 30 | no | | |
| 41 A100 | ACME STEEL | 100 LAKE STREET | | | yes | 1 | yes | no | | | \$ 0.00 | 30 | no | | |
| 42 ABLE01 | ABLE Engineering Pty Ltd | 599 Doncaster Road | | | yes | 1 | yes | no | | | \$ 10,000.00 | 30 | no | | |
| 43 ABLE01 | Alpha Parts Company | 1212 Alpha St | | | yes | 1 | yes | no | | | \$ 0.00 | 30 | no | | |

- 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 will be uploaded.

Verify in QAD

Since this is a real time transaction, you can see the changes immediately in QAD once the upload has been successfully completed. Verify the changes in QAD 2.1.1 menu.

The screenshot illustrates the Data Loader interface and a terminal window. The Data Loader interface shows a grid of fields for 'Customer from / to' (Rows 1-5) and a toolbar with 'Download', 'Upload', 'Find Error', 'Setup', 'Clear', and 'Help'. A message 'Errors Occurred!' is displayed above the grid. The terminal window shows the command 'adcsmt.p' running on a Putty session titled 'mfg@am32: ~ - PuTTY with 32Printer'. The output displays the creation of a new customer record 'NewUser' with details: Name: New Test User, Address: Test Address 1, Address: TEST123, Address: TEST ADDRESS 3, City: LosAngeles, State: CA, Post: 90036, Format: 0, Country: UNITED STATES, Attention: [2], Telephone: Ext: [2], Fax/Telex: [2]. The terminal also shows 'Customer Data' with various settings like Type: Multiple: No, Region: Currency: USD, Dual Pricing Cur:, Site: 10000, Lang:. Red arrows point from the Data Loader grid to the terminal window, highlighting the 'Name' and 'Address' fields.

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](#).