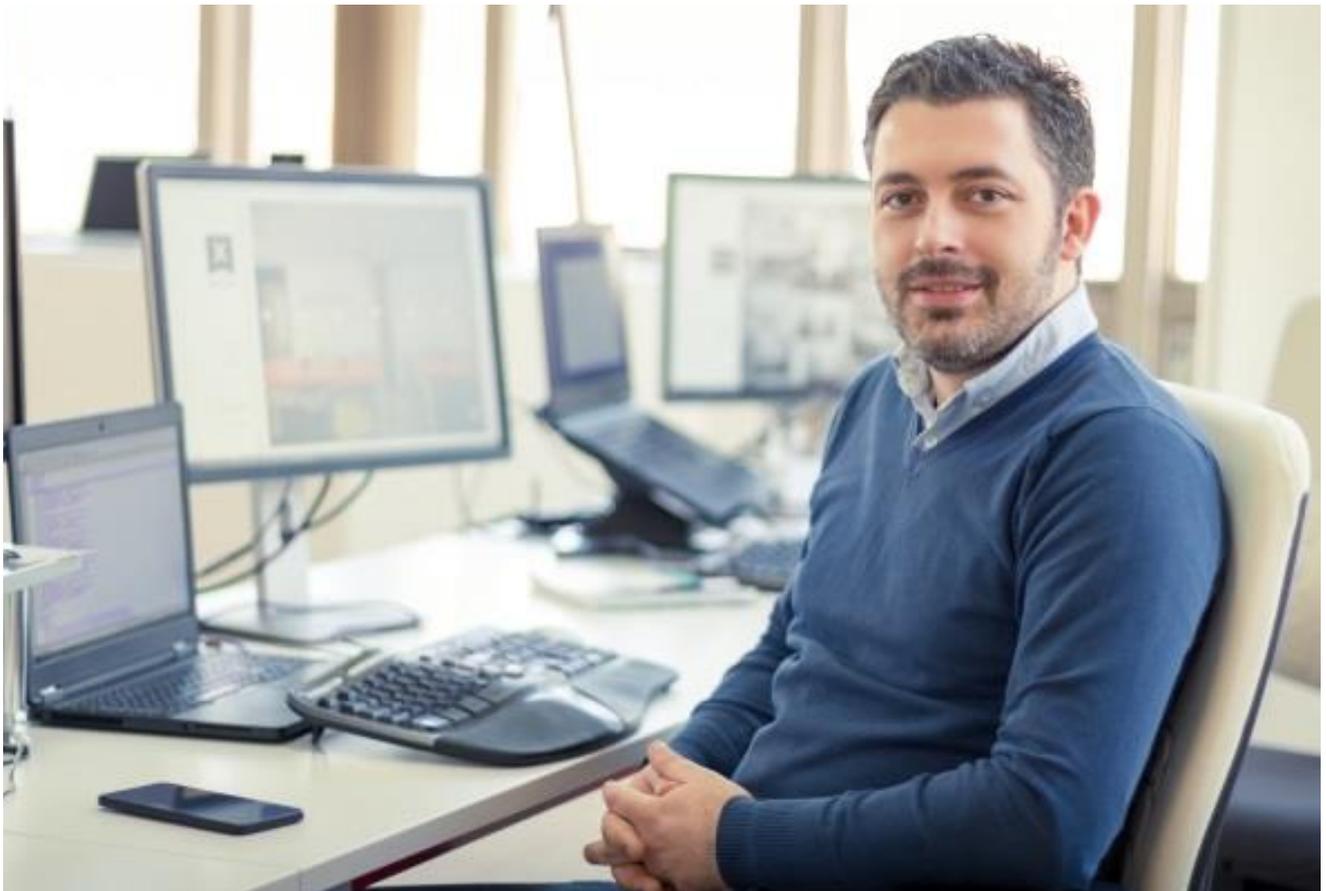


32 SOFT
DATA LOADERS
Productivity Solutions for QAD ERP

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

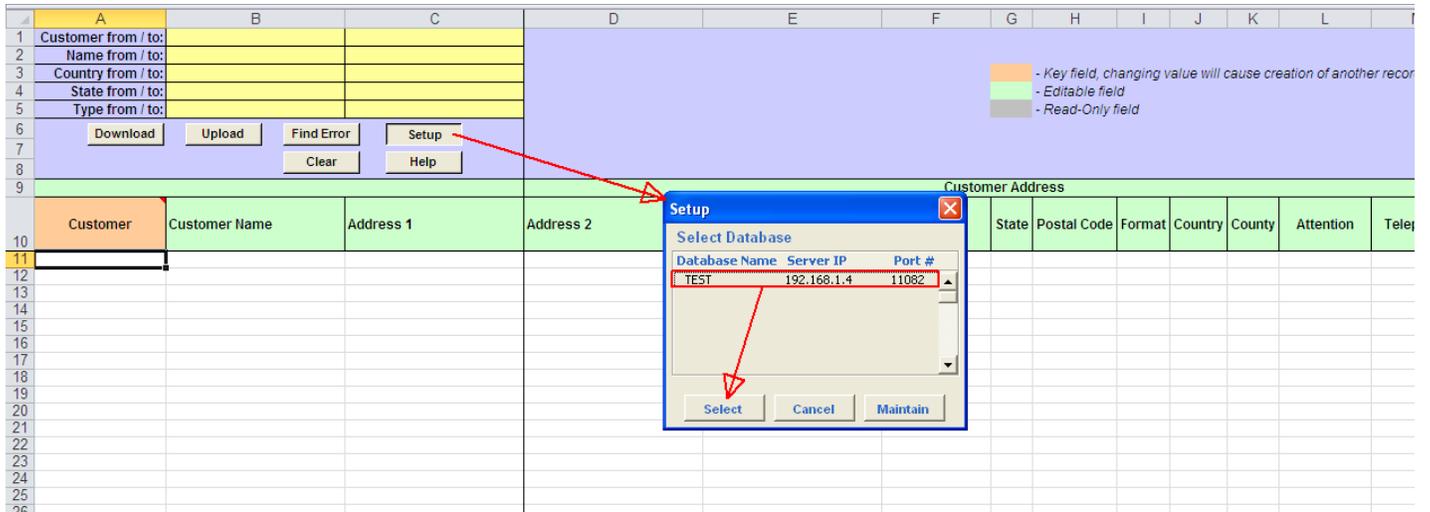
-  Master Data & Inventory
-  Distribution & Supply Chain
-  Finance
-  Production

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

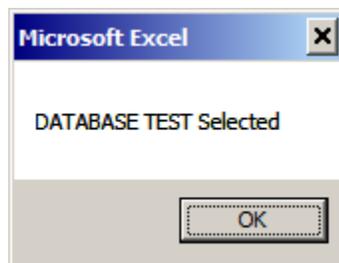
2.1.1 Customer Maintenance User Guide

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.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1	Customer from / to:			<div style="border: 1px solid gray; padding: 5px;"> ■ - Key field, changing value will cause creation of another record in 2.1.1 ■ - Editable field ■ - Read-Only field </div>										
2	Name from / to:													
3	Country from / to:													
4	State from / to:													
5	Type from / to:													
6	<input type="button" value="Download"/> <input type="button" value="Upload"/> <input type="button" value="Find Error"/> <input type="button" value="Setup"/>													
7	<input type="button" value="Clear"/> <input type="button" value="Help"/>													
8	Customer Address													
9	Customer	Customer Name	Address 1	Address 2	Address 3	City	State	Postal Code	Format	Country	County	Attention	Telephone	Extension
10														
11														
12														
13														
14														
15														
16														
17														
18														
19														
20														
21														
22														
23														
24														

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 login. User ID is validated against QAD. Use your QAD user ID and password.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1	Customer from / to:			Can't login: User ID does not exist										
2	Name from / to:													
3	Country from / to:	USA	USA											
4	State from / to:													
5	Type from / to:													
6	<input type="button" value="Download"/> <input type="button" value="Upload"/> <input type="button" value="Find Error"/> <input type="button" value="Setup"/>													
7	<input type="button" value="Clear"/> <input type="button" value="Help"/>													
8	Customer Address													
9	Customer	Customer Name	Address 1	Address 2	Address 3	City	State	Postal Code	Format	Country	County	Attention	Telephone	Extension
10														
11														
12														
13														
14														
15														
16														
17														
18														
19														
20														
21														
22														
23														
24														

QAD login

User ID:

Password:

Domain:

- 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:

Customer Address														
Customer	Customer Name	Address 1	Address 2	Address 3	City	State	Postal Code	Format	Country	County	Attention	Telephone	Extension	Fax
00010000	iversity of Cal - Ship To	1BriarLane	test1		LosAngeles	CA	90036		0	usa				
00010002	Consigned Inventory Customer	No Intransit Locations	test3		Chicago	IL	60195		0	USA				
00010003	Toy Company of America	17621HaminStreet	Buildig4A	test4	VanNuys	CA	91406		0	USA	William			
00010005	Consigned Inventory Customer	Intransit Location			Albany	NY	990099		0	USA				
00010006	Customer	1212 Customer St			New York	NY	21111		0	USA				
00011111	UCIrvine	100 University Dr			Irvine	CA	90687		0	USA				
00050004	Spare Parts Warehouse				MI				0	USA				
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	
01000006	TEST								0	usa				
01000007	TEST								0	USA				
01000009	Sample SSM Customer				Carpinteria	CA	93013		0	USA				
10000	Lowrance	12000 Skelly Ave			Tulsa	ok	92606		0	USA				
1001000	CENTURY HALLMARK	Attention: Accounts Payable	300000020 Century Blvd	P.O. Box 675	Los Angeles	CA	99000		0	USA	001	Mark Schnell	213-920-0394	213-920-039
10010001	Westwood Reliable	Westwood Shopping Center	77 Sunset Strip	Block B-2	Anaheim	CA	99029		0	USA	001	Rosetta Stone	213-923-0293	
10010003	Reliable Center	Central Avenue Shops	27002 Central Ave.	Suite 202	New York	NY	02929		0	USA		Sally Manders		
10010004	Gateway Reliable	Gateway Center	709 Bridge Street		San Francisco	CA	92838		0	USA		Johnny Walker	714-293-0293	

- 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

1. Change the values in the fields where necessary. All the fields with green headers are updatable fields, so you can change the values.
2. 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.

Customer Address														
Customer	Customer Name	Address 1	Address 2	Address 3	City	State	Postal Code	Format	Country	County	Attention	Telephone	Extension	Fax
00010000	iversity of Cal - Ship To	1BriarLane	TEST123	TEST ADDRESS 3	LosAngeles	CA	90036		0	usa				
00010002	Consigned Inventory Customer	No Intransit Locations	test3		Chicago	IL	60195		0	USA				
00010003	Toy Company of America	17621HaminStreet	Buildig4A	test4	VanNuys	CA	91406		0	USA	William			
00010005	Consigned Inventory Customer	Intransit Location			Albany	NY	990099		0	USA				
00010006	Customer	1212 Customer St	TEST ADDR2	TESTADDR3	New York	NY	21111		0	USA				
00011111	UCIrvine	100 University Dr			Irvine	CA	90687		0	USA				
00050004	Spare Parts Warehouse				MI				0	USA				
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	
01000006	TEST								0	usa				
01000007	TEST								0	USA				
01000009	Sample SSM Customer				Carpinteria	CA	93013		0	USA				
10000	Lowrance	12000 Skelly Ave			Tulsa	ok	92606		0	USA				
1001000	CENTURY HALLMARK	Attention: Accounts Payable	300000020 Century Blvd	P.O. Box 675	Los Angeles	CA	99000		0	USA	001	Mark Schnell	213-920-0394	213-920-039
10010001	Westwood Reliable	Westwood Shopping Center	77 Sunset Strip	Block B-2	Anaheim	CA	99029		0	USA	001	Rosetta Stone	213-923-0293	
10010003	Reliable Center	Central Avenue Shops	27002 Central Ave.	Suite 202	New York	NY	02929		0	USA		Sally Manders		
10010004	Gateway Reliable	Gateway Center	709 Bridge Street		San Francisco	CA	92838		0	USA		Johnny Walker	714-293-0293	
1004000	Worldwide Supply		8000 Central Avenue		Kansas City	MI	48802		0	USA	James	313-932-0239	313-932-000	

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

The screenshot shows a software interface for data management. At the top, a spreadsheet table is visible with columns A through O. A message in cell D1 states "Loaded Successfully to QAD2009 QP". Below the spreadsheet, there are several buttons: "Download", "Upload", "Find Error", "Setup", "Clear", and "Help". A legend indicates field types: orange for Key field, green for Editable field, and grey for Read-Only field. A "Status" dialog box is open, displaying a list of processing rows and the message "LOADED SUCCESSFULLY". The dialog box also includes a "Close" button and the text "32Soft Inc.". The spreadsheet table below the dialog box contains customer data with columns for Customer, Customer Name, Address 1, Address 2, Address 3, County, Attention, Telephone, Extension, and Fax.

Customer	Customer Name	Address 1	Address 2	Address 3	County	Attention	Telephone	Extension	Fax
00010000	University of Cal - Ship To	1BriarLane	TEST123	TEST ADDRESS 3					
00010002	Consigned Inventory Customer	No Intransit Locations	test3						
00010003	Toy Company of America	17621HaminStreet	Buildig4A	test4		William			
00010005	Consigned Inventory Customer	Intransit Location							
00010006	Customer	1212 Customer St	TEST ADDR2	TESTADDR3					
00011111	UC Irvine	100 University Dr							
00050004	Spare Parts Warehouse								
01000000	Colossal Conglomerates LTD	Suite 1000 Colossal Building	Colossal Industrial Park	15000 Production Drive		Bertha Blaise	1-800-333-9000	666	
01000006	Test								
01000007	TEST								
01000009	Sample SSM Customer								
010000	Lowrance	12000 Skelly Ave							
001000	CENTURY HALLMARK	Attention: Accounts Payable	300000020 Century Blvd	P.O. Box 675					
0010000	Westwood Reliable	Westwood Shopping Center	77 Sunset Strip	Block B-2					
00100003	Reliable Center	Central Avenue Shops	27002 Central Ave.	Suite 202					
00100004	Gateway Reliable	Gateway Center	709 Bridge Street						
004000	Worldwide Supply		8000 Central Avenue						
000000	Universal Industries	716 S. Driftwood 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

- 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.

The screenshot shows a spreadsheet interface for loading customer data. The spreadsheet has columns A through L. Row 1 contains a status message: "Loaded Successfully to QAD2009 QP". Rows 2-5 contain input fields for "Customer from / to:", "Name from / to:", "Country from / to:", "State from / to:", and "Type from / to:". Rows 6-8 contain buttons: "Download", "Upload", "Find Error", "Setup", "Clear", and "Help". Row 9 is a header for "Customer Address". Row 10 is a legend: orange for "Key field, changing value will cause creation of another record", green for "Editable field", and grey for "Read-Only field". Row 11 contains the following data: Customer: NewUser, Customer Name: New Test User, Address 1: Test Address 1, Address 2: TEST123, Address 3: TEST ADDRESS 3, City: LosAngeles, State: CA, Postal Code: 90036, Format: 0, Country: usa.

Customer	Customer Name	Address 1	Address 2	Address 3	City	State	Postal Code	Format	Country	County	Attention	Te
NewUser	New Test User	Test Address 1	TEST123	TEST ADDRESS 3	LosAngeles	CA	90036	0	usa			

- 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.

The screenshot shows the same spreadsheet as above, but with a "Status" dialog box open. The dialog box contains the following text: "Preparing upload data...", "Processing Row ... 11", "Loading Customers...", and "LOADED SUCCESSFULLY". The dialog box also has a "Close" button and the "32Soft Inc." logo.

Customer	Customer Name	Address 1	Address 2	Address 3	City	State	Postal Code	Format	Country	County	Attention	Telephone
NewUser	New Test User	Test Address 1	TEST123				90036	0	usa			

- 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.

	A	B	C	AK	AL	AM	AN	AO	AP	AQ	AR	AS	AT	AU	AV	
1	Customer from / to:															
2	Name from / to:															
3	Country from / to:	USA	USA													
4	State from / to:															
5	Type from / to:															
6		Download	Upload	Find Error	Setup											
7				Clear	Help											
8																
9	Customer Data															
10	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	01000009	Sample SSM Customer				yes	50		yes	no	PST/PDT	no	\$ 1,000,000.00	30	no	H
22	10000	Lowrance	12000 Skelly Ave			yes			yes	no	EST	no			no	
23	1001000	CENTURY HALLMARK	Attention: Accounts Payable	10		yes			yes	no	PST/PDT	no			no	
24	10010001	Westwood Reliable	Westwood Shopping Center	10		yes			yes	no	PST/PDT	no			no	
25	10010003	Reliable Center	Central Avenue Shops	10		yes			yes	no	PST/PDT	no			no	
26	10010004	Gateway Reliable	Gateway Center			yes			yes	no	PST/PDT	no	\$ 15,000.00	0	yes	9
27	1004000	Worldwide Supply		20		yes			yes	no	PST/PDT	no	\$ 37,500.00	2/10-30	no	
28	1005000	Universal Industries	719 S. Driftwood Ave.	10		yes			yes	no	PST/PDT	no	\$ 99.00	2/10PRO	no	
29	1006000	Sterling Industries	2000 Broadway			yes			yes	no	PST/PDT	no	\$ 99.00	30	no	
30	1007000	Supply Warehouse	Central Distribution Center	10		yes			yes	no	PST/PDT	no	\$ 99.00	30	no	1
31	1008000	Custom Homes and Buildings	2670 Tenth Street			yes			yes	no	PST/PDT	no	\$ 99.00	2/10-30	no	
32	1009000	EnviroCar	Reusable Resources Complex			yes			yes	no	PST/PDT	no	\$ 99.00	60	no	
33	1012000	Products Warehouse	Central Supply Division	10		yes			yes	no	PST/PDT	no	\$ 99.00	2/10-30	no	2
34	20010001	Anaheim Plaza Hotel	67 Harbor Blvd.			yes			yes	no	PST/PDT	no	\$ 99.00	30	no	
35	302	test	test			yes			yes	no	PST/PDT	no	\$ 99.00	30	no	
36	505	Favorite Supplier	333 Peachtree Street NE			no			yes	no	PST/PDT	no	\$ 99.00	30	no	or rat
37	555	Favorite Customer	333 Peachtree Street NE			yes			yes	no	PST/PDT	no	\$ 99.00	30	no	or rat
38	77777777	DUMMY RECORD FOR STANDIN	QUOTES/PROMOTIONS/CALL-IN			yes			yes	no	PST/PDT	no	\$ 99.00	30	no	or rat
39	88888888	MISCELLANEOUS CUSTOMER	(USED BY ACCOUNTS RECEIVA			yes			yes	no	PST/PDT	no	\$ 99.00	30	no	or rat
40	80000001	Summerland Sports Leagues	1234 My Street			yes			yes	no	PST/PDT	no	\$ 99.00	30	no	or rat
41	A100	ACME STEEL	100 LAKE STREET			yes			yes	no	PST/PDT	no	\$ 99.00	30	no	or rat
42	ABLE01	ABLE Engineering Pty Ltd	599 Doncaster Road			yes			yes	no	EST/EDT	no	\$ 10,000.00	30	no	or rat
43	AcmeCo	Acme Parts Company	1313 Acme St			yes			yes	no	EST	no	\$ 99,999,999.99	30	no	or rat

- 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 displays the QAD 2.1.1 Customer Maintenance interface. The top section is a data table with columns A through M. The table contains the following data:

Customer	Customer Name	Address 1	Address 2	Address 3	City	State	Postal Code	Format	Country	County	Attention	Telephone
NewUser	New Test User	Test Address 1	TEST123	TEST ADDRESS 3	LosAngeles	CA	90036	0	usa			

Below the table is a terminal window titled "mfg@amz32: ~ - PuTTY with 32Printer". The terminal displays the following information:

```
adcsmt.p 2.1.1 Customer Maintenance 05/02/17
Customer: NewUser
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 usa County:
Attention: [2]:
Telephone: [2]: Ext:
Fax/Telex: [2]: Added: 05/02/17

Customer Data
Sort Name: University of Cal - Ship To Type:
Salespnl: Multiple: No Region:
Ship Via: ups Currency: USD
AR Acct: 1200 Dual Pricing Cur:
Resale: Site: 10000
Remarks: Lang:

F1=Go 2=Hip 3=Ins 4=End 6=Mnu 7=Rcl 8=Clr 9=Prev 10=Next 11=Buf
```

Red arrows point from the terminal window back to the corresponding data in the table above, showing the synchronization between the two views.

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.