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Parts Updater

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Overview

The Parts Updater is a program that can be run outside of SedonaOffice to import parts lists to your Sedona inventory, or to update fields on existing SedonaOffice parts, such as pricing.

Note: Use of this product is not covered under your SedonaOffice Support Agreement. Work provided by SedonaOffice staff as a result of its use may be subject to an hourly charge. We highly recommend running the updater on a sandbox database and creating a backup of your production database prior to using the updater in production.

Note: The Parts Updater cannot update standard costs as these are assigned on a warehouse-by-warehouse basis and affect general ledger activity.

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Setup

Downloading the Updater

The setup is different for SedonaCloud and Enterprise customers. For SedonaCloud customers the Parts Updater appears as an option in your cloud portal:
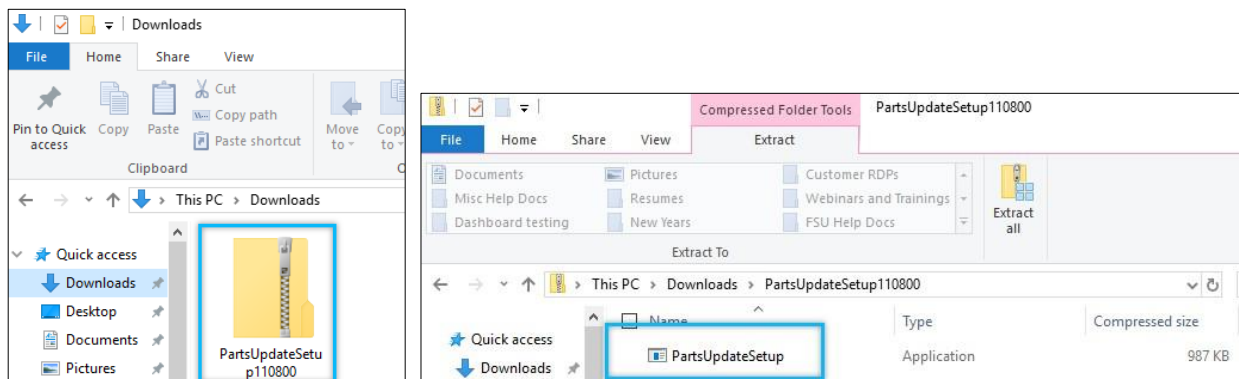

Enterprise customers must download the updater. To do this:

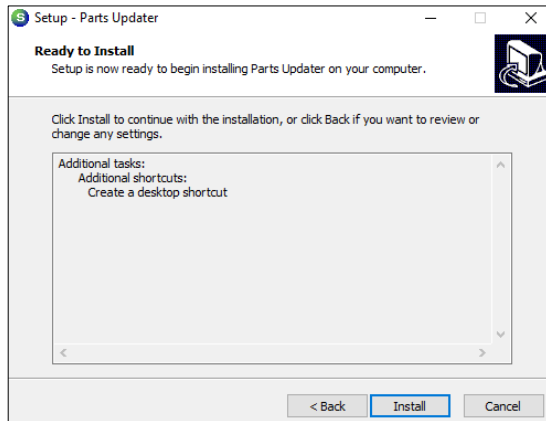Go to Sedonaoffice.com – Resources & Education – Reference Documents – View Downloads - Sedona Office Parts Update Utility. (https://sedonaoffice.perennialsoftware.com/resources/reference-documents/#downloads)

(Users on a SedonaOffice version prior to 5.7.26 must use Parts Updater version 9).

The updater will save on your machine as a zip file called PartsUpdateSetup. Open the zip folder and double click the PartsUpdateSetup application.
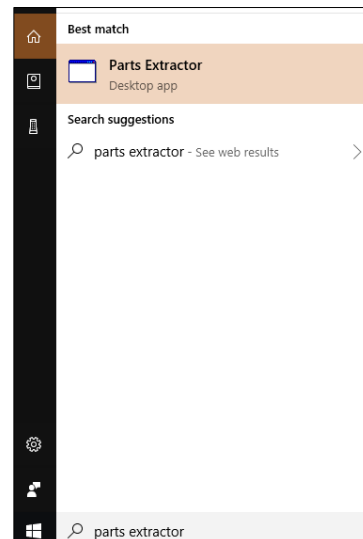
The Parts Updater setup wizard will appear. Finish installing using the setup wizard.

Acquiring Your Parts List

To use the Parts Updater, you must have a list of the parts you want to add and/or update. You can create this list yourself, get it from a vendor, or export it from SedonaOffice if you are updating existing parts. The parts list must be saved as a .csv file.

The Parts Extractor can be used to export a parts list from SedonaOffice. Cloud customers will find the Parts Extractor in their cloud portal. Enterprise customers will find the Parts Extractor was automatically downloaded with the Parts Updater. Search your computer for 'Parts Extractor' to pull it up.

To Run the Parts Extractor:

1. Select which company you would like to pull parts from. Remember to test part updates on your sandbox before updating your live database. If the company you need is not listed this means you do not have authority to run the parts extractor on it. Try contacting your internal IT department.

2. Select what vendor information to pull. Parts in SedonaOffice can have more than one vendor, but the Parts Updater can only pull one line for each part. This means you must choose which vendor's information to pull. You can select to pull whatever vendor is primary for the part, or you can select to pull all parts associated with a specific vendor.

3. Select whether you want to pull all parts, only active parts, or only inactive parts.

4. Click Start and the system will open a file explorer so that you can name your new parts list and select where it will be saved. The default file type is .csv; make sure to leave the file as this type.

5. Select Save and the parts list file will generate.

6. Open the parts list file and edit as needed. For example, if you need to update the descriptions for your parts you could open the file, update all of the descriptions, and save. Your file would then be ready to use in the Parts Updater.
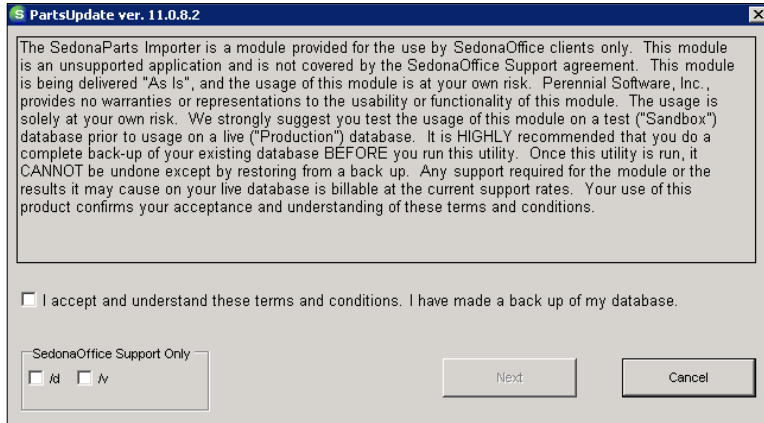
Running the Parts Updater
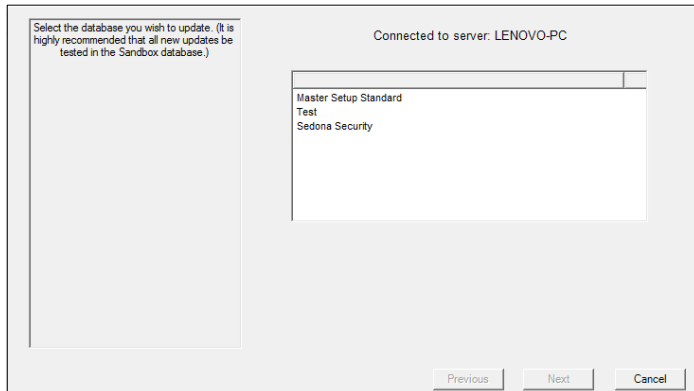
Terms and Conditions

When you open the Parts Updater the first window that appears is the terms and conditions. Read the terms and conditions, and if you agree, check the box to accept. This step is important because the Parts Updater allows you to change a large amount of data at once. If you are not careful you could incorrectly adjust data. The terms and conditions ask you to:

- Backup your database before using the updater, and test the updater in your sandbox first.

- Understand that this program is not covered under your support agreement. This means if the updater is used incorrectly and your database requires data repair, all work will be subject to an hourly charge.
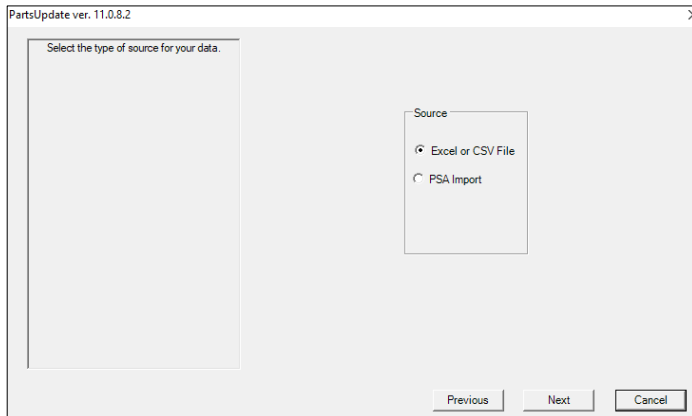

Database and File Selection

1. Select the database you are updating. If your database is not listed this means you do not have authority to run the updater on it. Try contacting your internal IT department.

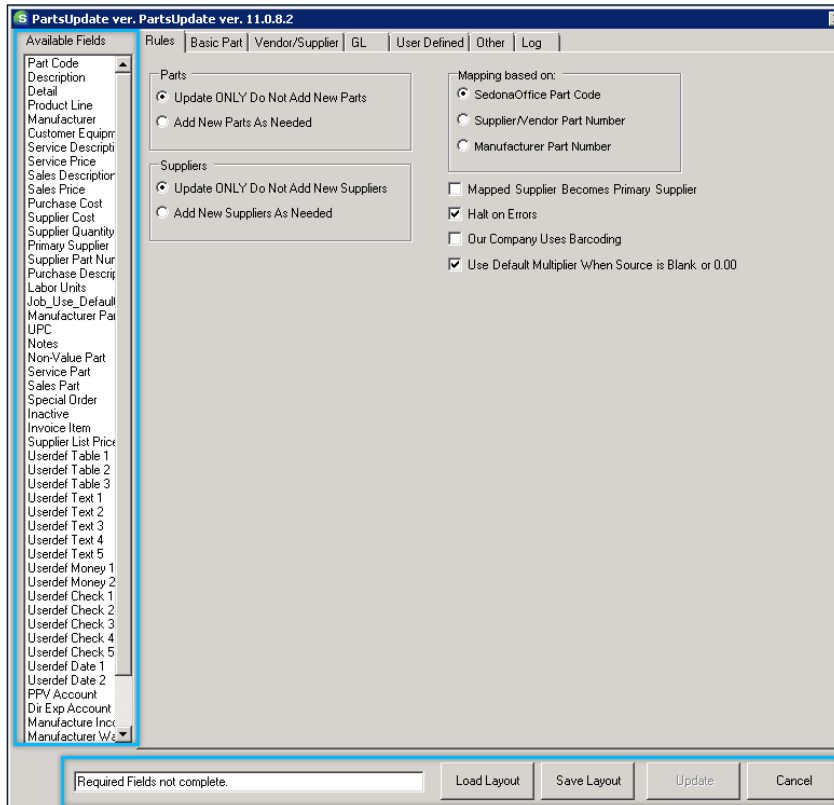2. Select CSV file type. The updater now only accepts .csv files.

3. The updater will open a file explorer window so that you can select your parts list .csv file. When you select this file the mapping and defaults window will appear.

Layout of the Updater

The Parts Updater has seven tabs, plus a section on the left showing available fields, and a section at the bottom showing general options. You do not need to use every tab or field when doing a parts update. Often you will only need to use a handful of fields that are relevant to what you are trying to update.

Available Fields and General Options

The Available Fields section on the left is only for your reference. You cannot select anything here; it only shows you what columns are in the .csv file you selected.

The general options along the bottom of the updater are:

- Status Box – While this field displays "Required Fields not complete" you cannot select the Update button. Which fields are required depends on what you are updating. For example, if you are only updating parts, then by default the only required field is Part Code. But if you adding parts then many other fields such as Product Line, and Supplier become required. Required fields display in red as in the example below. When all required fields have been entered the status box will be blank, and the Update button will highlight.

- Save Layout – Saves your progress if you need to return and finish later, or if you need to perform a similar update in the future. The layout is saved as a text file on your machine.
- Load Layout – Re-loads a saved layout.
- Update – Select this when your layout is done and you are ready to run the update.
- Cancel – Closes the Parts Updater.

Rules

Rules is the first tab of the Parts Updater and it contains the following basic settings. These settings let the updater know what type of update you will be performing.

- Parts – This determines if you will be only updating existing SedonaOffice parts, or if you will be adding new parts as well. If you select Update ONLY the updater will ignore any part in your .csv file that does not already exist in SedonaOffice. If you select to Add New Parts as Needed, if the updater finds a part in your .csv file that is not in SedonaOffice, it will add that part to your database. If you select to add new parts, many fields will become required in the Parts Updater so that the updater can gather all the info it needs to properly add a new part to your database.

- Suppliers – If you are making changes to the suppliers on your parts, this option determines whether you will be updating suppliers already listed on your parts, or if you will be adding a new supplier to your parts. Note: This option does not add new vendors to your database. Any new vendors will need to be added manually in SedonaOffice before the updater can be used to add that new vendor to parts. Note: The terms Supplier and Vendor are used interchangeably in the Parts Updater.
- Mapping based on – In order to update parts the updater must match the part codes in your .csv file to the part codes in SedonaOffice. Using this radio button you can change this so that the updater matches the numbers in your .csv file to your SedonaOffice vendor or manufacturer part numbers instead.
- Mapped Supplier Becomes Primary Supplier – Check this box if you would like the supplier you are working with to become the primary supplier for the parts in your .csv file. If you want to update information for this vendor only, but do not necessarily want to make this vendor primary, uncheck this box.
- Halt on Errors – Always leave this box checked. Checking this option forces the updater to stop the update and warn you if it encounters any serious problems.
- Our Company Uses Barcoding – Check this box if your company uses the SedonaOffice Barcode add on module. When this module is in use the updater will verify each part has a unique UPC code before performing the update.
- Use Default Multiplier When Source is Blank or 0.00 – This check box refers to part pricing. Always leave this box checked unless it is your intention to update your part prices to 0.00. If you want your part prices updated to 0.00 then uncheck this box.

Mapping Tabs

The tabs Basic Part through Other all contain different fields from SedonaOffice that the Parts Updater has the ability to update. Each tab has three columns:

1. Destination Field Name – These fields appear in the left column. This is a list of SedonaOffice fields that you can update using the Parts Updater.

2. Source Field Name – This is the middle column. Each row has a drop down. Each drop down lists all the columns that are in your .csv file (these also display in the available fields section).

3. Default Value – These fields appear in the right column and are only available for some rows. These fields allow you to select a default value from your database, or in some cases hand enter a default value.

To use the Parts Updater, find the SedonaOffice fields that you would like to update in the left column. Use the middle column drop down to select the associated field from your .csv file. This column in your .csv file should already contain the updates you are making. Select Update and the system with find each part from your .csv file in SedonaOffice, identify the field(s) you have selected to update, and update those fields in SedonaOffice to match what is in the .csv file.

Example - Updating notes on a part

The Notes field for part 5028 is blank:

We add the note "Test Note" to the .csv file for part 5028:

We map the part code so that the updater can find part 5028 in the database, and then we map the note field so the updater knows that we want to update it. It will pull the new note from the .csv file.

After we click update the part now reflects our new note:

Basic Part

The following fields are available for update on the Basic Part tab:

Vendor/Supplier

The following fields are available for update on the Vendor/Supplier Tab

GL

The following fields are available for update on the GL tab:

User Defined

The following fields are available for update on the User Defined tab:

Other

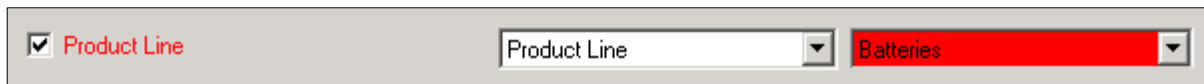The following fields are available for update on the Other tab:

Note: The **New Part Code** field is for use when the part code itself is what you need to update. The **UPC** field can only be used if your company uses barcoding.

Using the Defaults Column

The third column on the mapping tabs is the default column. Only some fields allow for a default entry. There are two ways to use the defaults column.

1. Map to values in your .csv file, and use the default as a backup - In this case you would map the field to your .csv file and also enter a value in the default column. The updater will then update your parts to match what is listed in your .csv file. If the updater finds an entry in the .csv file is blank or invalid, it will use the selected default value instead.

If you have chosen *not* to enter a default value, and your .csv file entry is blank or invalid, the field will be updated to be blank in the database. This is why default values sometimes show in red as required. If, for example, you are adding new parts, the new parts must have a product line. The product line cannot be updated to be blank; so a default value is required just in case your .csv file has a missing or misspelled entry.

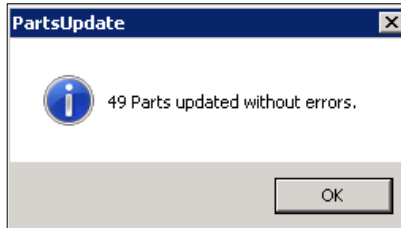| ☑ Product Line | | Product Line ▼ | Batteries ▼ |

2. Updating all parts in your file to the same value – If you are updating all of the parts in your .csv file to have the same value for a specific field, then it is not necessary to map that field at all. Instead you can leave the middle column blank and just enter the desired default. The system will then take the parts from your .csv file and update their SedonaOffice value to match the default you entered. For example, if you wanted to update all the parts in your file to have the same note, you could leave the middle column blank and enter that note in the default column.

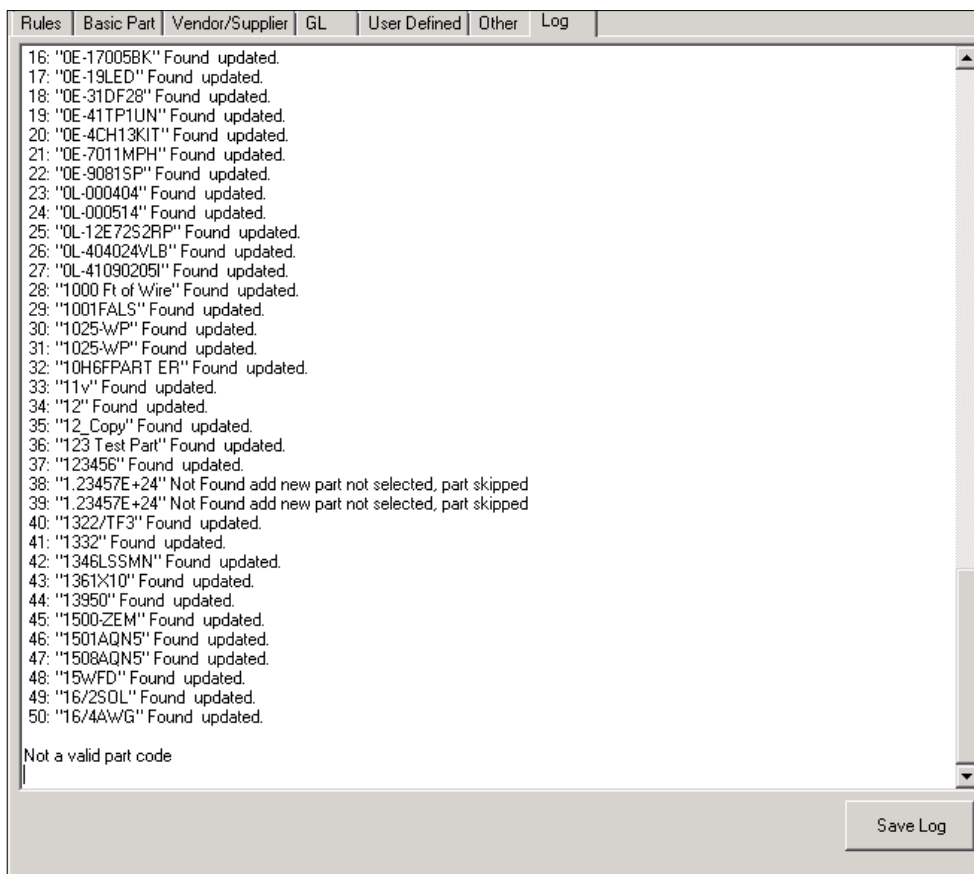| ☑ Notes | Blanks OK | ▼ | Last updated by CA |

Log

After you click Update the updater will run through and add and/or update your parts. When it is done a pop up will appear letting you know how many parts were updated and if there were any errors.

After receiving this pop up you can go to the Log tab to view a list of what parts were updated and what changes were made to them. If there were any errors a description of the error will be shown in the log. The Log always begins by recording the opening of the updater; scroll down past this to see the log of part edits. The last line of the log will always say "Not a valid part code"; this is not an error. It signifies the updater reached the last line of the .csv file, which is a blank line, and therefore not a valid part code.

If you are having difficulty troubleshooting a Parts Updater error you can save the log with the Save Log button in the bottom right, and send this to SedonaSupport for assistance.
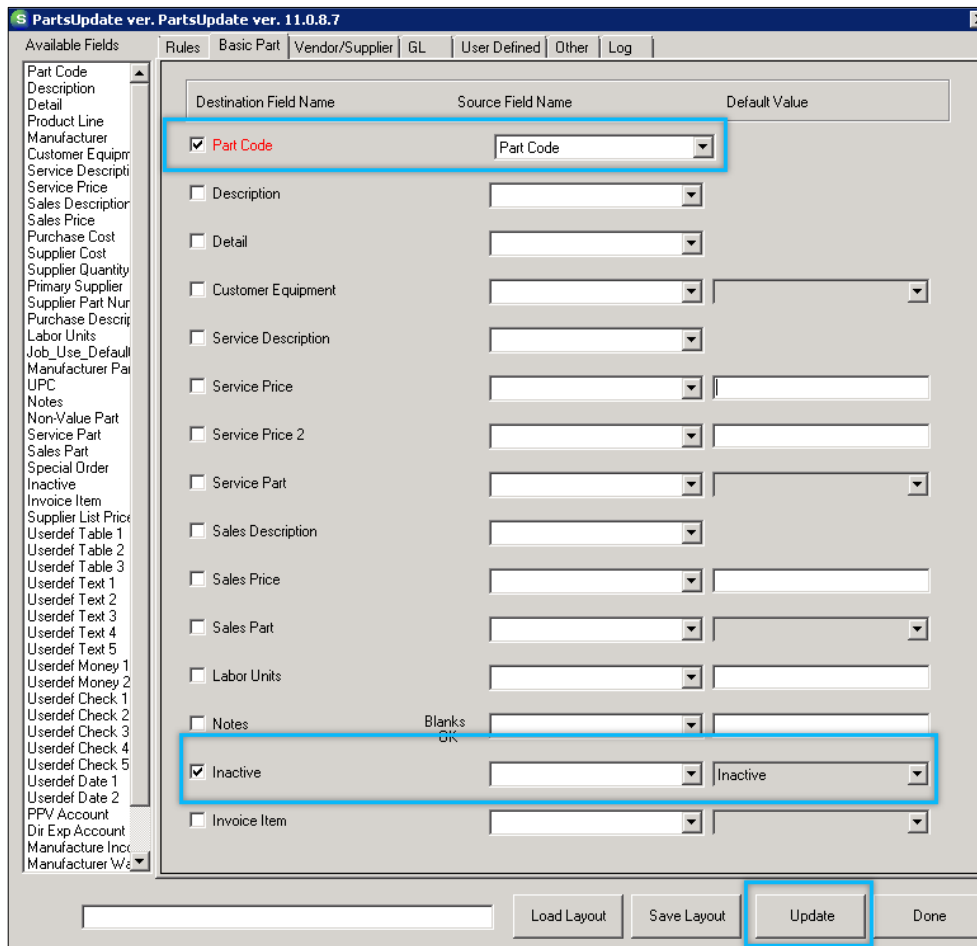
Part Update Examples

Three of the most common part updates are described below.

Inactivating Parts

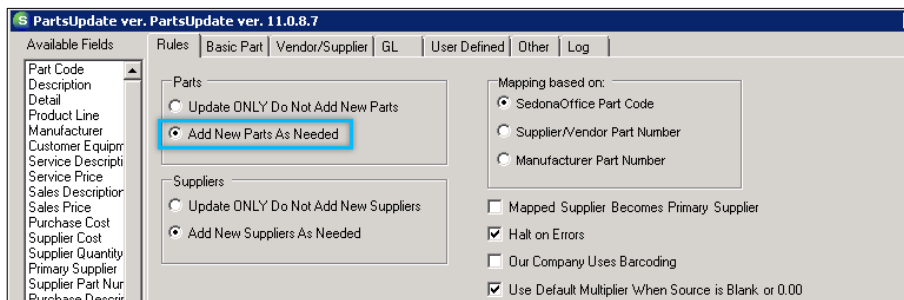To inactivate a large quantity of parts at once:

1. Create a .csv file listing all the parts that need to be inactivated. You can create this list yourself, or use the parts extractor to help pull this list.

2. Open the updater, and select your database and file. Remember to try the update in your sandbox before doing it in a live database.

3. On the Basic Part tab map the part code field to the part code column in your .csv file.

4. Find the Inactive field on the Basic Part tab. Do not map this field, but instead select Inactive from the default column drop down.

5. Select update. All of the parts in your csv file will be marked inactive in SedonaOffice.
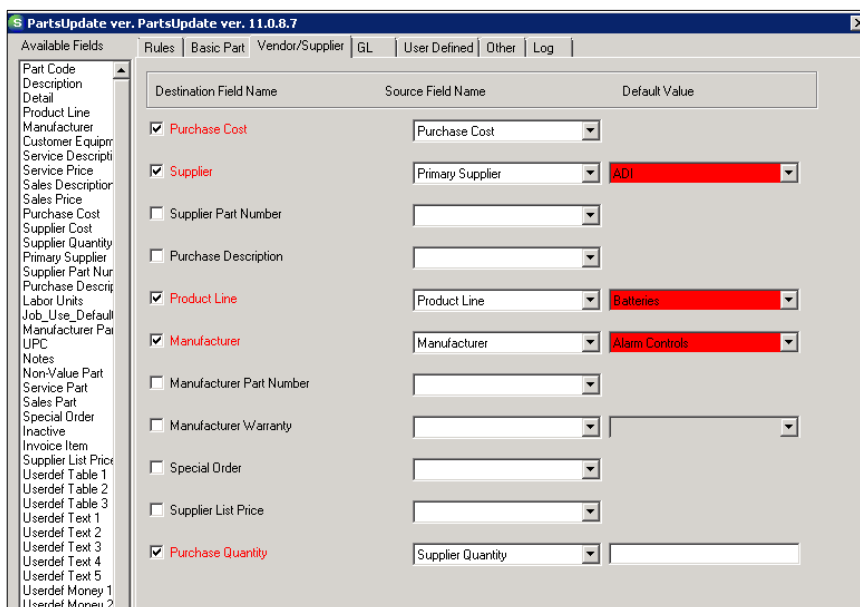
Adding New Parts

To add new parts to your database:

1. Acquire the list of parts to be added to your database. This list would likely be provided to you by a vendor. Make sure the file is a .csv, and that it has a header row.

2. Open the updater, and select your database and file. Remember to try the update in your sandbox before doing it in a live database.

3. On the Rules tab, switch the first radio button to Add New Parts As Needed. When you do this the next radio button will automatically switch to Add New Suppliers As Needed. This is because new parts do not yet have a supplier, and must have one added.

4. Because these parts are new, many fields on the mapping tabs will show in red as required. An entry must be made for every red required field. You may also choose to map fields which are not required. If a field has a default option, remember that you may choose not to map the field and instead just enter a default to apply to all the parts in your file. This can be done even when the field is required.

5. Once all of the necessary fields are filled out select Save Layout at the bottom of the updater. This way when you run the update in your live database (or if you ever need to run the same update in the future) you will not have to re-map all the fields. You can load the layout you are saving to have all the fields auto populate.

6. Select update. All of the parts in your csv file will be added to your SedonaOffice database.

Updating Part Pricing

There are three ways to update part pricing using the updater. You can enter the new price in your .csv file and map to that, you can have the updater calculate your new price using the purchase cost, or you can use a combination of the two.
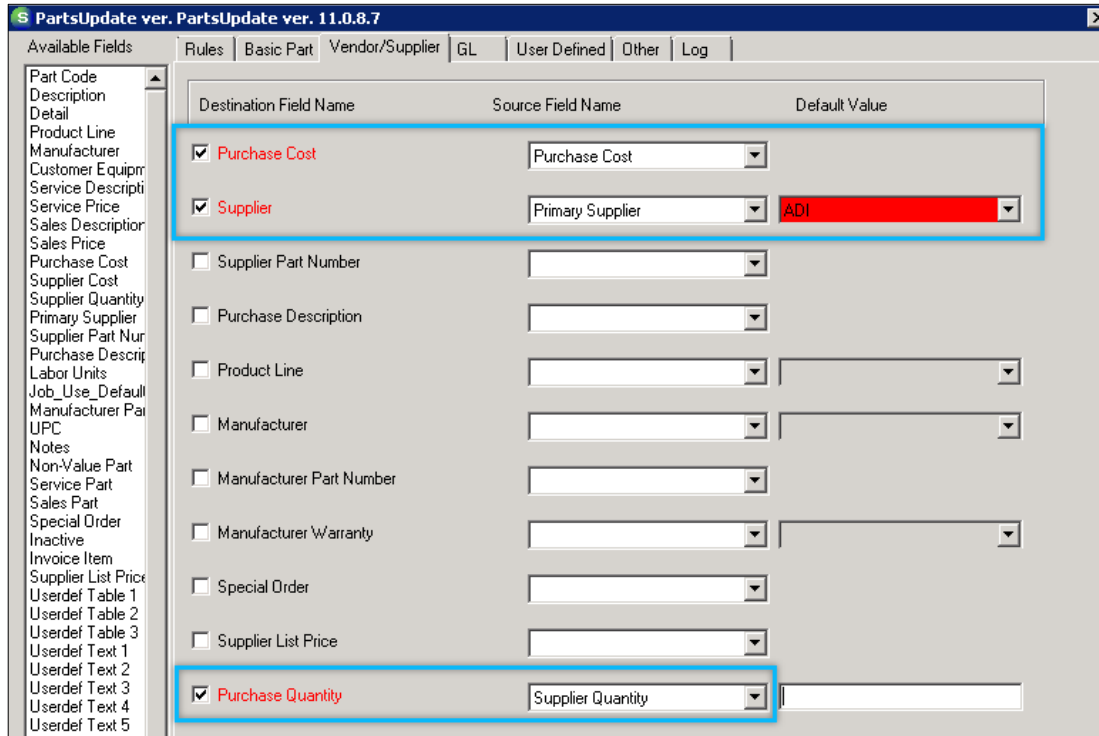
To update your prices to a set value:

1. Acquire the list of parts to be updated either by getting this list from a vendor, creating this list yourself, or exporting it from SedonaOffice using the parts extractor. Make sure the file is a .csv and that it has column headers.

2. Make sure the column(s) for the new part price(s) is filled out with the correct new price for each part.

3. Open the updater, and select your database and file. Remember to try the update in your sandbox before doing it in a live database.

4. On the Basic Part tab, map the part code field to the part code column in your .csv file. On this same tab the Service Price, Service Price 2, and Sales Price are listed. These are the only three prices that can be updated. Select the prices you will be updating and map that field to the associated column from your .csv file.
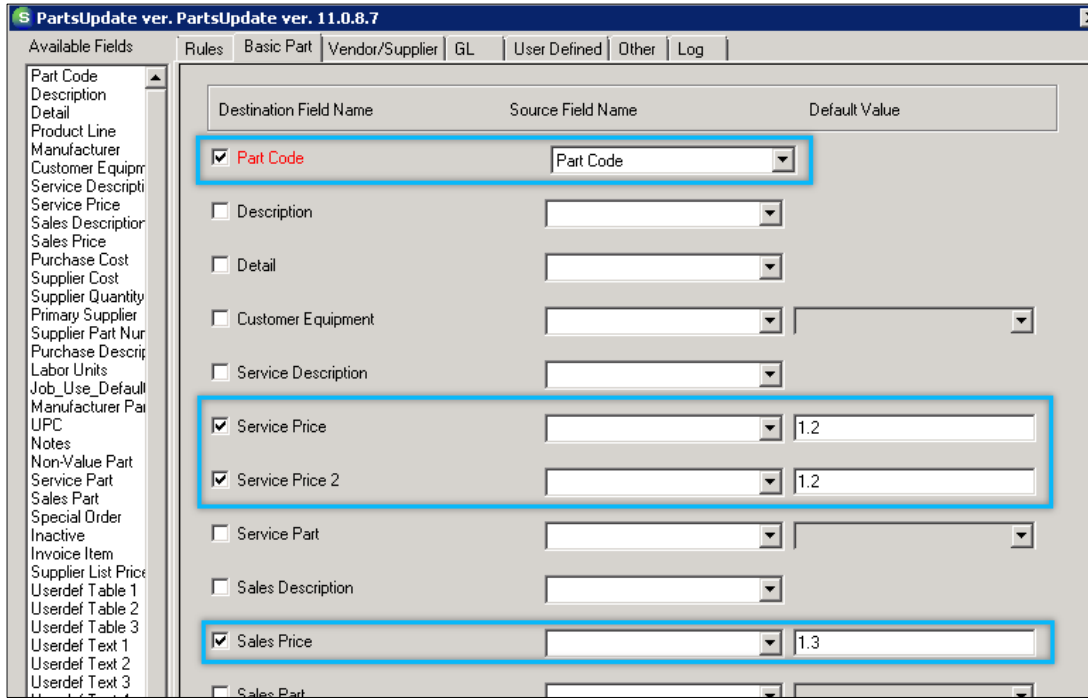
5. Because you are updating pricing the updater will also require you to enter vendor and purchase cost information on the vendor tab. Since you are mapping to values in your .csv file these vendor fields will not be used, but the updater requires them just in case it finds a blank in your .csv file.
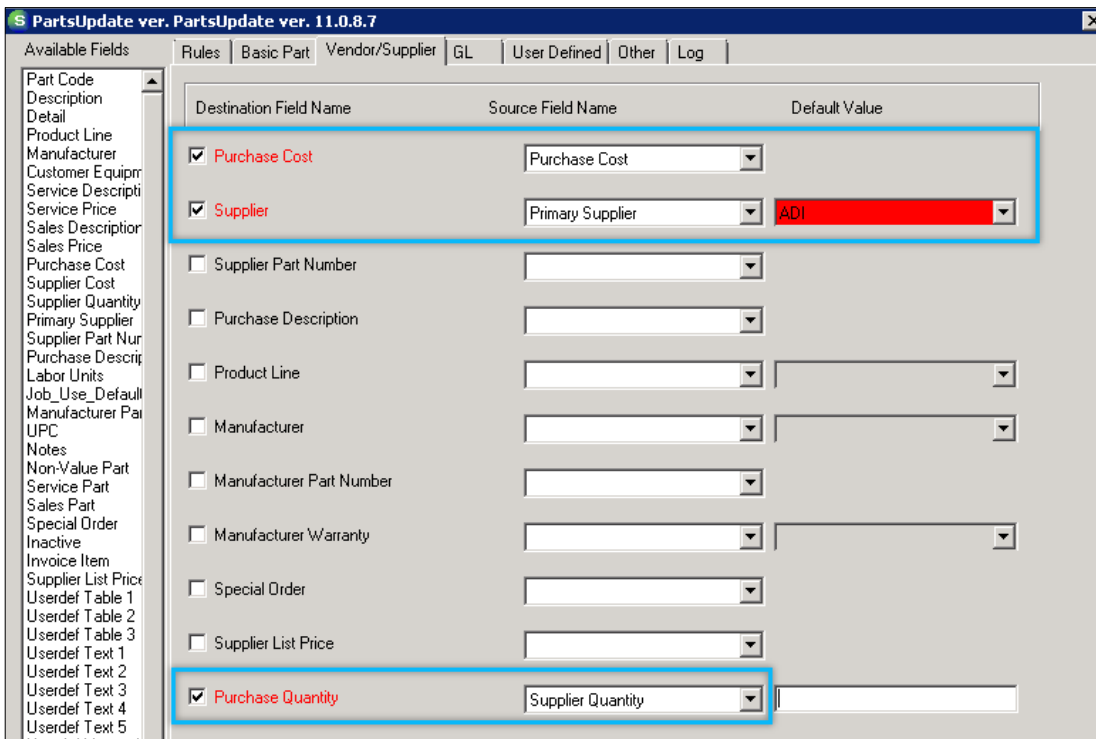

6. Select update. In SedonaOffice the price of all the parts on your list will be updated to the amount you entered in the .csv file.

To update your prices based on their purchase cost:

1. Acquire the list of parts to be updated either by getting this list from a vendor, creating this list yourself, or exporting it from SedonaOffice using the parts extractor. Make sure the file is a .csv and that it has column headers.

2. Open the updater, and select your database and file. Remember to try the update in your sandbox before doing it in a live database.

3. On the Basic Part tab map the part code field to the part code column in your .csv file. On this same tab the Service Price, Service Price 2, and Sales Price are listed. These are the only three prices that can be updated. Select the prices you will be updating and enter a multiplier in the default column for these fields. The updater will be multiplying the number you enter by the purchase cost of each part to calculate the new price.
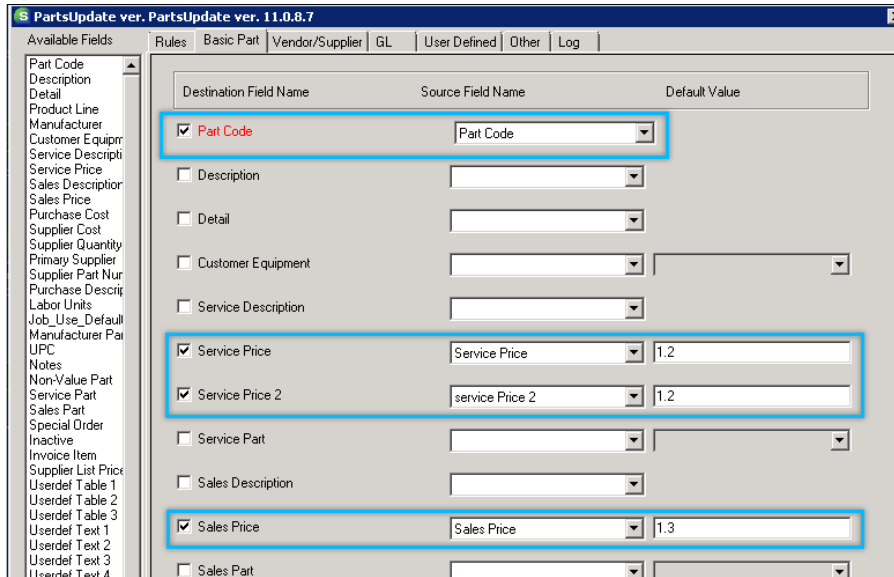
4. Because you are updating pricing based on the purchase cost, you must also enter the vendor and purchase cost information on the vendor tab.

5. Select update. The updater will multiply the purchase cost in your .csv file by the multiplier you entered on the Basic Part tab. This value will be the new price in SedonaOffice for all the parts in your .csv file.

To update your prices using mapped and multiplier prices:

To update your pricing based on both the mapped and multiplier method follow the steps for the above methods, but enter both a mapped column and a multiplier for the price fields. When the updater is setup this way the system will update your new prices to match your entry in the .csv file. If the entry in your .csv is blank or invalid the system will use the multiplier value instead.

Updating part prices to 0.00:

The last checkbox on the Rules tab of the updater is labeled 'Use Default Multiplier When Source is Blank or 0.00'. This box is checked by default, and its purpose is to make sure your prices are *not* updated to 0.00. As long as this box is checked the updater knows that if it ever encounters a 0 in your .csv file, it should ignore the 0 and use your default multiplier instead. If it is your intention to update your part prices to 0.00 you must uncheck this box before performing your price update.