

# Sage 500 ERP

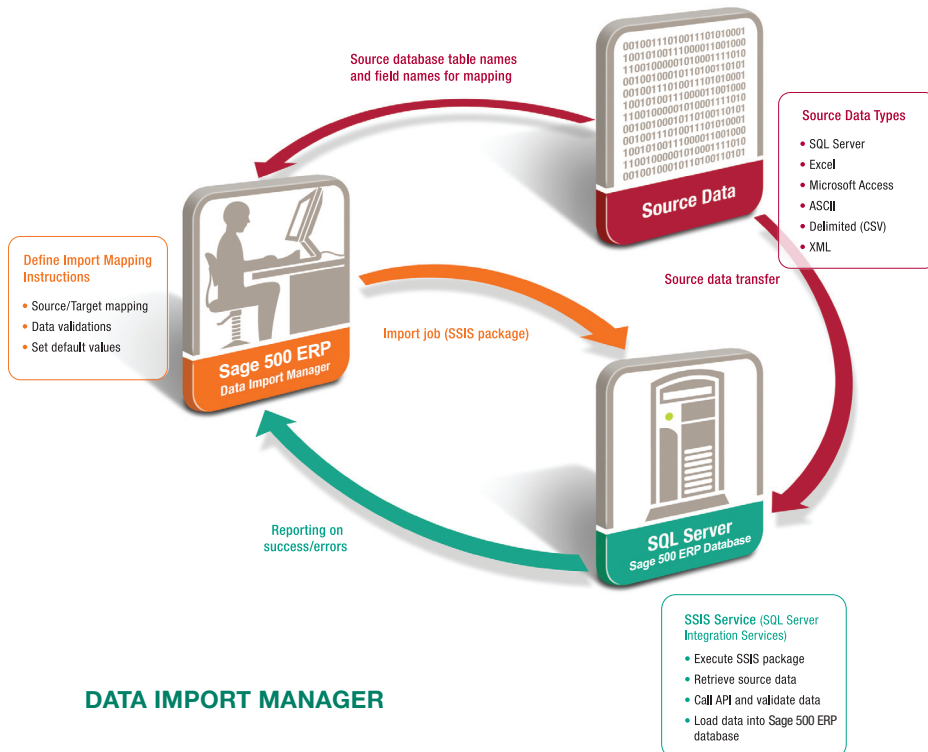


## Data Import Manager

With the Data Import Manager, you no longer need to perform software “gymnastics” to get the information you need. By leveraging the strong Sage 500 ERP (formerly Sage ERP MAS 500) tradition as an open ERP platform, the Data Import Manager lets you easily import data from other applications on a one-time or recurring basis.

If you perform imports from a specialized software package, you’ll find you can use Data Import Manager to make the transfer virtually seamless. Importing data using Data Import Manager is a simple process. Built with .NET and Microsoft SQL Server® SSIS technology, this robust database mapping tool includes a simple graphical interface that lets you map data fields and import data directly from sources such as Microsoft® Access®, Excel®, SQL Server, XML and more.

Yet, the power of the Data Import Manager lies in its additional data controls. For example, if you need to keep your Sage 500 ERP master file synchronized with a prospect database, you can set the import to run automatically every day, every hour, or every minute. You can chain imports together, so that an invoice import automatically follows a customer import. By leveraging the power of database scripting and SQL Server SSIS, you can even instruct the program to run a script file automatically before the import, upon successful completion of an import, or after an error occurs. Records with errors are identified and can be corrected and rerun later.



## DATA IMPORT MANAGER

### BENEFITS

- Import entity or transaction information from a wide variety of formats
- Built-in defaults for required fields with ability to override
- Wizard-based interface for simplified data mapping
- Automated error reporting for invalid data ensuring referential integrity
- Ability for novice users to run import jobs created by database experts
- Run imports one time or schedule to run on a regular basis
- Security to control user access to predefined import job

### IMPORT DATA TYPES

- SQL Server
- ASCII Files
- Delimited (CSV)
- Microsoft Access
- Microsoft Excel
- XML

## Features

### Mapping Wizard

Configure database imports using a powerful mapping wizard that provides detailed knowledge of the Sage 500 ERP database including required fields, default validations, lookups, and user-defined fields.

### Scheduling

By leveraging SQL Server's SSIS technology, import jobs can be scheduled to run on a regular basis with a complete audit trail should errors occur during the import process.

### Optionally Perform Subroutines

Run additional commands, scripts, or other functions based on three events: before job start, on job success, or on job failure. Subroutines also can be added before and after each record write and before and after assigning data fields.

### SQL Server Connectivity

Link multiple SQL Server tables together, and point and click to select fields for importing. SQL Server's SSIS technology will then automatically generate the SQL statement for import or export, and Data Import Manager permits editing of the SQL statement for advanced users.

### Data Validation

Validation logic is built into Data Import Manager to assure that the data being imported conforms to Sage 500 ERP rules. Validations performed by Data Import Manager are automatically listed and may be removed if not required for the import. New validations also may be created for specialized requirements (for example, do not permit import of future-dated invoices).

### Security

Security can be granted for either execution or editing purposes providing even the most novice user with the ability to run regular imports.

### Chaining of Jobs

Jobs can be set to run in sequence (for example, import invoices immediately following a customer import).

### Advanced Data Controls

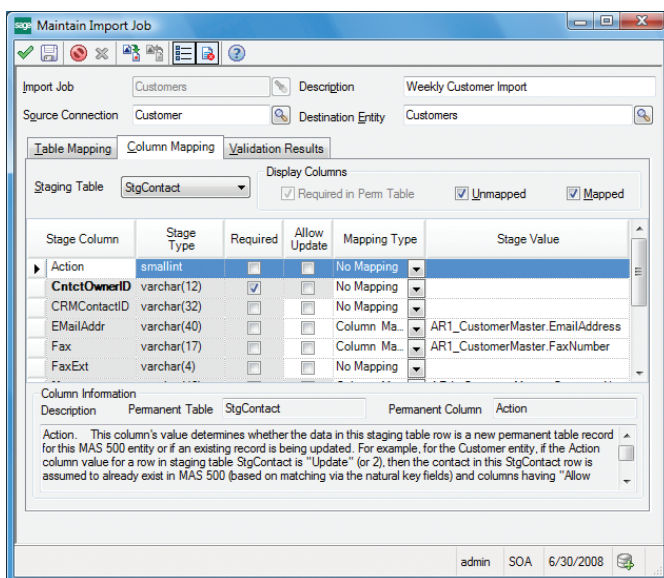
Skip or select records based on standard logic criteria (such as AND, OR). Conditional logic allows a field to be assigned based on the value of another field. For example, the sales tax code can be assigned based on the customer address.

### Job Definition Export

Jobs can easily be prepared for transporting to another computer at a remote location.

### Preview Option

The Test button permits easy viewing of sample data. You also can sample an entire file and print or display import log statistics (number of records imported, and more).



A powerful mapping wizard provides detailed knowledge of the Sage 500 ERP database, so you can easily and accurately configure database imports.