Vendor Update Import Setup

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Set up Path: *Settings > Accounts Payable > Vendor Update Imports*

Import Path: *Records > Vendors > Edit Drop-Down Menu > Update Import*

Changes to Vendor contact, address, and custom information for existing vendors can be imported from a file. The Name and Vendor ID are required to update information for existing vendors and does not allow the creation of new vendors.

General

Connector Type: Defines the communication method, protocol, or interface used to access and retrieve the data.

Connection String: A string of text that specifies the information needed to establish a connection between the software and a data source, such as a database file or external service. It acts like a set of instructions or a key that tells the software to locate and access the data it needs to import.

Command Text: When the connection string is defined, the command text defaults to selecting all items from the external file. The command text can be modified when situations arise that require the information from the file to be manipulated in some way to obtain specific results. An example of this is when multiple columns from the external file need to be combined into a single item. For additional information on this feature, please contact SGA support.

Reference Columns By: Determines how the columns in your data are identified during the import process.

- **Reference by Name:** This means you use the column header or the column name to refer to data.
- **Reference by Number:** This means you reference columns based on their position or index within a dataset. So instead of using the column name, you refer to the column by its numerical position.

Columns

From Column: Add lines for each external column you wish to import. From Column is the column name or number on the external file; see "Reference Columns By" above.

To Column: Click on the drop-down arrow to select the SGA item that matches what is listed in the "From Column". The available columns are listed below.

Column Name	Required? (Y/N)	Comments
Name	Yes	The vendor name must be entered in the format used for searching and sorting in the vendor browse.
Vendor ID	Yes	This is a unique number assigned to the vendor by the computer upon addition.
Payment Name	No	Name to be used on the check if different from the vendor name.
Status	No	Status to be used for the vendor. If not specified, the vendor will be added with an active status
Vendor Type	No	Type of vendor. If not specified, the default type from the setup tab will be used.
Vendor Account	No	The number that identifies your organization to the outside vendor. This number can be included on payments to help ensure the monies are applied to the proper account.
Address ID	No	The name of the address ID to be assigned to the imported addresses. If not specified, the default ID from the setup tab will be used.
Contact	No	Contact information for the imported vendor.
Address 1	No	First address line.
Address 2	No	Second address line.
City	No	City
State	No	2-digit state code.
Zip	No	Zip code. Allows for up to 15 characters.
Phone 1	No	Primary phone number.
Phone 2	No	Secondary phone number.
Fax	No	Fax number.
Email	No	Email address.
Dft Account	No	Default expense account for invoice entry.
1099 Code	No	Default 1099 code for invoice entry.
W9	No	Code to indicate if the W9 form is on file.
Federal ID	No	Federal ID for 1099 reporting.
1099 Name Override	No	Name to be used on the 1099 form if different from the vendor name.
Separate Payment Per Invoice	No	If specified, each invoice will generate a unique check number when payment is made.

Column Name	Required? (Y/N)	Comments
Account Type	No	For EFT payments, specify the bank account type as C (Checking) or S (Savings).
Bank Routing Nbr	No	For EFT payments, specify the bank route number.
Bank Account Nbr	No	For EFT payments, specify the bank account number.
Send Email Notification	No	For EFT payments, specify whether the remittance information should be emailed to the vendor after payment processing.
Dft Due Date Days	No	If specified, the payment terms will default to the vendor's invoices. Enter the number of days to calculate the due date starting with the invoice date.
Additional Custom Items	No	If custom information items exist on the Vendor Maintenance screen, they will also be available for mapping to the external file for import.