

## Document History

Date	Issue	Notes
16 March 2016	23	Added <b>AccountCode</b> field to the <b>Catalogues</b> file. Added <b>Qty</b> field to the <b>Catalogue/Product Matrix</b> file, for merchandising purposes. Updated the data type of various quantity-related fields from <b>Number</b> to <b>Decimal</b> . Added <b>Countries</b> file. Added <b>Areas</b> , <b>Carrier/Product Type Matrix</b> , <b>Carrier Rates</b> , <b>Carriers</b> and <b>Product Types</b> files for carriage charging purposes. Added <b>AreaCode</b> , <b>DeliveryAddressNo</b> and <b>InvoiceAddressNo</b> fields to the <b>Customers</b> file. Added <b>ProductType</b> and <b>CartonWgt</b> fields to the <b>Products</b> file for carriage charging purposes.
23 July 2015	22	Added <b>AddressNo</b> field to the <b>Backorders</b> file (used from Sales Presenter version <b>1.5.0</b> ). Added <b>LanguageCode</b> field to the <b>Customer Accounts</b> file. Added file formats for the <b>Languages</b> and <b>Language/Product Matrix</b> files.
19 June 2015	21	Added file formats for the <b>Filter Tree</b> and <b>Filter Tree/Product Matrix</b> files. Added <b>OrderType</b> field to the <b>Order Analysis Codes</b> file. Added <b>FamilyCode1</b> , <b>FamilyCode2</b> , <b>FamilyCode3</b> , <b>FamilyCode4</b> , <b>FamilyCode5</b> and <b>ProductCode</b> fields to the <b>Product Group Rep Exclusions</b> file.
11 December 2014	20	Added 16 new user fields to the <b>Products</b> and <b>Customer Accounts</b> files (for future use)
31 October 2014	19	Added <b>MovieRef</b> , <b>DocumentRef</b> and <b>AudioRef</b> fields to the <b>Products</b> file. Added file format for the <b>Sales Tax Groups</b> file. Added <b>MinOrdValue</b> , <b>PaymentType</b> and <b>SettlementDiscount</b> fields to the <b>Customer Accounts</b> file (used from CloudCart version <b>1.3.0</b> ). Added <b>MinOrdValue</b> field to the <b>Currencies</b> file (used from CloudCart version <b>1.3.0</b> ).
15 July 2014	18	Added file format for the <b>Sales Tax Matrix</b> file. Added <b>SalesTaxGroup</b> field to the <b>Customer Accounts</b> file. Added <b>SalesTaxCode</b> field to the <b>Product</b> file.
23 June 2014	17	Added <b>CatalogueGroupCode</b> and <b>ProductExclusionCode</b> fields to the <b>Customer Accounts</b> file. Added <b>Discount</b> field to the <b>Locations</b> file. Added <b>PriceList03</b> , <b>PriceList04</b> and <b>PriceList05</b> fields to the <b>Customer Accounts</b> file.
4 October 2013	16	Added <b>StdPrice</b> field to the <b>Order Line History</b> file (for future use).
16 August 2013	15	Added file formats for the <b>Order History</b> and <b>Order Line History</b> files. Correction in the notes for the <b>PriceStream</b> field in the <b>Customer Accounts</b> file. This field can be used at any time, not just when using the comprehensive pricing functionality.
8 July 2013	14	Added file format for the <b>Linked Products</b> file.
11 June 2013	13	Updated the <b>Order Analysis Codes</b> file section to reflect changes in Sales Presenter version <b>1.2.5</b> .
7 May 2013	12	Added <b>QtyEntryUnit</b> field to the <b>Customer Accounts</b> file. Added <b>MaxDiscount</b> field to the <b>Reps</b> file. Added file format for the <b>Order Analysis Codes</b> file.
10 January 2013	11	Added <b>PrimaryPriceList</b> field to the <b>Customer Accounts</b> file. Updated the description of the <b>ApplyDiscount</b> field on the <b>Price Lists</b> file. Added <b>DueDate</b> and <b>CancelDate</b> fields to the <b>Backorders</b> file.
16 October 2012	10	Added contact detail fields to the <b>Reps</b> file.
13 August 2012	9	Added <b>StkQty2</b> field to the <b>Product</b> file.
7 June 2012	8	Corrections made to the <b>Discount Code/Product Matrix</b> file format – all break discounts in the matrix are percentages only. In the <b>Price List/Product Matrix</b> file they can be either percentages or new selling prices.
5 March 2012	7	Added new fields to the <b>Reps</b> file format to give the ability to prohibit certain features within Sales Presenter on a rep by rep basis. Added the <b>Customer Notes</b> file format. Added the <b>Product Group Rep Exclusions</b> file format.
10 January 2012	6	Added <b>ExDescription</b> , <b>DisplaySequence</b> and <b>PhotoRef</b> fields to both the <b>Catalogues</b> and

Date	Issue	Notes
		<b>Family Codes</b> files. Added <b>ProhibitDiscount</b> field to the <b>Product</b> file.
21 December 2011	5	Included additional file formats for the <b>Comprehensive Pricing</b> cloud module
20 August 2011	4	Cosmetic changes
8 July 2011	3	Corrected typo in back order file format – <b>DespatchedQty</b> field is now <b>PickedQty</b>
6 July 2011	2	Included additional file formats for the <b>Account History</b> cloud module
20 June 2011	1	Initial issue

## Introduction

This document details the file formats that are used for the various files that can be uploaded to your Blue Alligator cloud account for subsequent downloading into Sales Presenter. It should be read in conjunction with the information found in your cloud account.

By default, your cloud account is expecting your data to be uploaded within CSV files (that is, one data record per line with each field being separated by a “comma” symbol). You can configure an alternate field separator if required.

The first line of your files can contain the field headings for information purposes (this is an optional system-wide setting – the headings are either present in all files or no files).

This document details all the possible fields that you can provide for all possible types of file. You can omit the uploading of certain types of file if you don’t require them. You can also omit the uploading of individual fields that you do not require. In the “field mappings” section of your cloud account you have the ability to provide default value for any fields you’re not uploading.

Sample CSV files can be downloaded from the documentation section of the support forum at [www.bacapps.co.uk](http://www.bacapps.co.uk)

The following types of file can be uploaded to all cloud accounts:

File	Notes
Catalogues	Specifies the catalogues to be shown in Sales Presenter.
Catalogue/Product Matrix	Specifies the products to be shown in each catalogue.
Countries	Specifies a list of countries and country codes for lookup purposes.
Customer Accounts	Specifies the customer account information.
Family Codes	Specifies the family codes to be shown in Sales Presenter.
Group/Catalogue Matrix	Specifies customer-specific groups of catalogues.
Linked Products	Specifies a list of products that can be linked to a “master” product.
Locations	Specifies the user locations to be used (such as “on the road” or “exhibition x”). At least one location needs to be uploaded for use on the Sales Presenter login screen.
Order Analysis Codes	Specifies pre-defined analysis codes that can be selected by the user during order entry, to be recorded against an order or order line.
Products	Specifies the product information.
Product Exclusions	Specifies products that cannot be viewed/ordered by a particular customer.
Product Family Codes	Specifies the family codes to be used for each product.  Note: family codes can be specified as part of the product file. This file has been provided for instances where you wish to use family codes but are unable to extract them from your back-office system with the other product information.
Product Group Rep Exclusions	Specifies a list of product groups that individual sales reps are excluded from accessing.
Reps	Specifies the sales reps for the customer accounts. At least one rep needs to be uploaded for use on the Sales Presenter login screen.
Standard Narratives	Specifies pre-defined narratives for special instructions on orders.

Users of the **Account History** cloud module can also upload the following types of file:

File	Notes
Backorders	Specifies the outstanding order information to be shown for a customer account.
Customer Notes	Specifies a more detailed level of notes for a customer than is provided for by the <b>Notes</b> field on the Customer Accounts file.
Filter Tree	Specifies the branches to be shown in Sales Presenter
Filter Tree/Product Matrix	Specifies the products to be shown in each branch of the filter tree.
Languages	Specifies the list of languages that can be selected when creating a new customer account.
Language/Product Matrix	Specifies alternate product descriptions/extended descriptions to be used when working with the language code configured for a customer account.
Ledger Codes	Specifies the descriptions for any ledger codes used in the Ledgers CSV file.
Ledgers	Specifies the ledger information to be shown for a customer account.
Order History	Specifies historical order information to be shown for a customer account.
Order Line History	Specifies the products contained on the historical orders.

Users of the **Comprehensive Pricing** cloud module can also upload the following types of file:

File	Notes
Areas	Carriage charging functionality. Specifies the surcharge limits and values to be charged.
Carrier/Product Type Matrix	Carriage charging functionality. Specifies the product types each carrier handles
Carrier Rates	Carriage charging functionality. Specifies the carrier prices.
Carriers	Carriage charging functionality. Specifies the list of carriers.
Currencies	Specifies the currency information.
Customer Discount Codes	Specifies the discount codes (for use with the discount matrix) recorded against customer accounts.
Discount Code/Product Matrix	Specifies the discounts applied to each customer and product discount code combination.
Last Price Paid	Specifies the last price that a customer paid for a product.
Price Lists	Specifies the price lists used in Sales Presenter.
Price List/Product Matrix	Specifies the products (and their prices) associated with price lists.
Product Discount Codes	Specifies the discount codes (for use with the discount matrix) recorded against products.
Product Types	Carriage charging functionality. Specifies the list of product types
Sales Tax Groups	Specifies the list of sales tax groups that can be selected when creating a new customer in Sales Presenter.
Sales Tax Matrix	Specifies the rates to be used for combinations of tax groups (customer related) and tax codes (product related) when working with sales tax.

## Areas

A list of all the Surcharge order values and prices to charge against the order.

This information is used to calculate what surcharge value to add to an order depending on the order value.

The file should contain one line per area code.

Field	Data Type	Description
Code	Text	Customer area code (as specified in the <b>Customers</b> file).
Description	Text	For future use.
Currency Code	Text	The currency code to be used for the Surcharge.
UptoOrdVal1	Decimal	Apply <b>Surcharge1</b> when the order value is up to this value.
UptoOrdVal2	Decimal	Apply <b>Surcharge2</b> when the order value is up to this value.
UptoOrdVal3	Decimal	Apply <b>Surcharge3</b> when the order value is up to this value.
UptoOrdVal4	Decimal	Apply <b>Surcharge4</b> when the order value is up to this value.
UptoOrdVal5	Decimal	Apply <b>Surcharge5</b> when the order value is up to this value.
UptoOrdVal6	Decimal	Apply <b>Surcharge6</b> when the order value is up to this value.
UptoOrdVal7	Decimal	Apply <b>Surcharge7</b> when the order value is up to this value.
UptoOrdVal8	Decimal	Apply <b>Surcharge8</b> when the order value is up to this value.
UptoOrdVal9	Decimal	Apply <b>Surcharge9</b> when the order value is up to this value.
UptoOrdVal10	Decimal	Apply <b>Surcharge10</b> when the order value is up to this value.
Surcharge1	Decimal	Surcharge to be applied.
Surcharge2	Decimal	Surcharge to be applied.
Surcharge3	Decimal	Surcharge to be applied.
Surcharge4	Decimal	Surcharge to be applied.
Surcharge5	Decimal	Surcharge to be applied.
Surcharge6	Decimal	Surcharge to be applied.
Surcharge7	Decimal	Surcharge to be applied.
Surcharge8	Decimal	Surcharge to be applied.
Surcharge9	Decimal	Surcharge to be applied.
Surcharge10	Decimal	Surcharge to be applied.

## Backorders

A transaction by transaction list of outstanding order information for a customer account.

This information is used purely for display purposes on the customer account enquiry screen. Therefore you can populate as few or as many fields as you wish.

The file should contain one line per account code, product code and order reference combination.

Field	Data Type	Description
AccountCode	Text	Customer account code.
ProductCode	Text	Product code.
OrderRef	Text	Order reference.
OrderDate	Date	Date of the order (in the format specified in the configuration section of your cloud account).
Price	Decimal	Price paid by the customer.
OrderQty	Decimal	Quantity originally ordered by the customer.
PickedQty	Decimal	Quantity that has been picked.
InvoicedQty	Decimal	Quantity that has been invoiced.
OSQty	Decimal	Quantity that is still outstanding.
Status	Text	A status code or description from your back-office system.
DueDate	Date	Date the order is due for delivery.

Field	Data Type	Description
CancelDate	Date	Date the order will be cancelled by if not delivered.
AddressNo	Number	Address number that this backorder relates to (optional).

## Carrier/Product Type Matrix

A list of your carriers and product types which they handle. This is used so that orders are assigned a carrier which is able to handle all of the products on the order.

The file should contain one line per carrier code and product type combination.

Field	Data Type	Description
CarrierCode	Text	Carrier code. This code is not displayed; it is used to tie the carrier to product types.
ProductType	Text	Product Type. This code is not displayed; it is used to tie the product types to a carrier.

## Carrier Rates

This file is used to work out the cheapest carriage charge suited to the quantity on an order.

The file should contain one line per area code, carrier code, Qty entry unit and Qty combination.

Field	Data Type	Description
AreaCode	Text	The area code this rate suitable for.
CarrierCode	Text	The carrier code this rate is for.
QtyEntryUnit	Number	The delivery unit used for this order
Qty	Decimal	The minimum quantity needed for this rate.
Rate	Decimal	The rate to be charged for this carrier.

## Carriers

This file is used to hold various thresholds for a carrier.

The file should contain one line per carrier code.

Field	Data Type	Description
Code	Text	The Carrier Code, this is not displayed to the user: this is used for to pair up orders to a carrier
Description	Text	
CurrencyCode	Text	This is the currency code which the carrier uses. This is used against the <b>Carrier Rates</b> file
ProductCode	Text	This is the Product Code to use for the Carrier.
CartonsFull	Decimal	This is the percentage of a full Carton to class as full.
InnersFull	Decimal	This is the percentage of a full Inner to class as full.
PalletsFull	Decimal	This is the percentage of a full Pallet to class as full.
WeightFull	Decimal	This is the percentage of a full Weight to class as full.
CubeFull	Decimal	This is the percentage of a full Cube to class as full.

## Catalogues

A catalogue will contain one or more products. This file defines the catalogue itself, not the products that belong to it.

The file should contain one catalogue code per line. Each catalogue code should be unique within the file.

Field	Data Type	Description
Code	Text	Catalogue code. This code is not displayed in Sales Presenter. It is used to tie products to a catalogue.
Description	Text	Catalogue description. This is the text that is displayed to the user when they're selecting a catalogue from a list.
ExDescription	Text	Optional extended description to display against a catalogue if using the <b>PhotoRef</b> field.
DisplaySequence	Number	Optional sequence to display the catalogues in. Within the same sequence number (or in the case where no sequence numbers are used) catalogues are displayed in ascending <b>Description</b> sequence.
PhotoRef	Text	Optional filename (excluding the file extension) of an image file in your cloud account to associate with the catalogue. If present, this image will be displayed in the drop-down list when the user wants to select a catalogue.
AccountCode	Text	Optional customer account code to associate with the catalogue if the catalogue is specific to one customer. Leave this blank to allow the catalogue to be used for all customers.

## Catalogue/Product Matrix

This file defines the products that belong to a catalogue. By default, products will be shown in the catalogue in product code sequence. However, you can use an optional display sequence to force an alternate sequence.

The file should contain one catalogue code / product code combination per line. A product can appear in any number of catalogues.

Field	Data Type	Description
CatalogueCode	Text	Catalogue code (as specified in the catalogues file).
ProductCode	Text	Product code (as specified in the products file).
DisplaySequence	Number	Optional sequence to display the products within a catalogue. Within the same sequence number (or in the case where no sequence numbers are used) products are displayed in ascending product code sequence.
Qty	Decimal	Optional merchandising default quantity to use for this product on this catalogue.

## Countries

This file defines the currencies that are used for customers and price lists.

The file should contain one currency code per line. Each code should be unique within the file.

Field	Data Type	Description
Code	Text	Country code held against a customer delivery address.
Description	Text	Country name for display purposes.

## Currencies

This file defines the currencies that are used for customers and price lists.

The file should contain one currency code per line. Each code should be unique within the file.

Field	Data Type	Description
Code	Text	Currency code.
Description	Text	Currency description.
Rate	Decimal	Conversion rate to be applied to product prices to arrive at the price to be used.
DisplaySequence	Number	For future use.
Indicator	Text	For future use.
MinOrdValue	Decimal	The default minimum order value to be used when working with this currency (a zero value means "use the system-wide default value"). This can be overridden for individual customer accounts if required. <b>Please note: this field is only used by CloudCart at present.</b>

## Customer Accounts

This file defines the customer accounts that orders will be placed against. New customer accounts can also be created within Sales Presenter.

Sales Presenter can handle customer accounts with more than one delivery address. In this instance, each address should be given a unique number (within that customer account).

The file should contain one customer account / delivery address combination per line.

Field	Data Type	Description
AccountCode	Text	Customer account code
AddressNo	Number	Unique (within the customer account) delivery address number. You can specify a default value of 0 within your cloud account if your customers do not have multiple delivery addresses.
CompanyName	Text	Customer company/trading name
Address1	Text	First line of the delivery address
Address2	Text	Second line of the delivery address
Town	Text	Third line of the delivery address
County	Text	Fourth line of the delivery address
CountryCode	Text	Country code for the delivery address (as specified in the <b>Countries</b> file).
Country	Text	Unused
Postcode	Text	Delivery address post code
PhoneNo	Text	Telephone number of your contact at the customer
FaxNo	Text	Fax number of your contact at the customer
MobileNo	Text	Mobile number of your contact at the customer
EmailAddress	Text	Email address of your contact at the customer. This acts as the default email address to use when sending out order acknowledgements.
ContactName	Text	The name of your contact
RepCode	Text	The code of the sales rep assigned to the customer.
PriceStream	Number	Default price stream to be used for the customer.

Field	Data Type	Description
OnHold	Text	Yes/No value to indicate whether the customer account is on hold. Values of <b>1, Y, YES</b> or <b>TRUE</b> indicate that the account is on hold. All other values indicate that the account isn't on hold.
DefaultDiscount	Decimal	Discount (as a percentage) to be applied to prices for this customer.
GrossPriceAdjuster	Decimal	Percentage uplift to be applied to gross prices for the customer.
CurrencyCode *1	Text	Currency code to use for the customer.
Balance	Decimal	Account balance
CurrentBalance	Decimal	Aged debt – current month
Balance1	Decimal	Aged debt – band 1
Balance2	Decimal	Aged debt – band 2
Balance3	Decimal	Aged debt – band 3
Balance4	Decimal	Aged debt – band 4
Balance5	Decimal	Aged debt – band 5
Balance6	Decimal	Aged debt – band 6
CreditLimit	Decimal	The customers credit limit
PrimaryDiscountCode *1	Text	Primary code for the discount matrix.
DiscountCode *1	Text	Secondary code for the discount matrix.
PrimaryPriceList *1	Text	Primary price list code for the customer account.
PriceList *1	Text	Secondary price list code for the customer account.
PriceList03 *1	Text	Third price list code for the customer account.
PriceList04 *1	Text	Fourth price list code for the customer account.
PriceList05 *1	Text	Fifth price list code for the customer account.
DeliveryAddressNo	Number	Delivery address number to be selected when using the “auto select” feature.
InvoiceAddressNo	Number	Invoice address number to use on order acknowledgements (if configured accordingly in your cloud account).
Notes	Text	Notes relating to the customer. These notes are displayed in the Customer Enquiry Balances/Info screen.
UserField01	Text	User-defined field to be displayed against the customer
UserField02	Text	User-defined field to be displayed against the customer
UserField03	Text	User-defined field to be displayed against the customer
UserField04	Text	User-defined field to be displayed against the customer
UserField05	Text	User-defined field to be displayed against the customer
UseQtyBreaks *1	Text	Yes/No value to indicate whether quantity breaks on price lists can be used for the customer. Values of 1, Y, YES or TRUE indicate that they can. All other values indicate that they can't
QtyEntryUnit	Number	Default quantity entry unit to be used for this customer ( <b>0</b> =use system-wide configuration setting, <b>1</b> =Pieces, <b>2</b> =Cartons, <b>3</b> =Inners, <b>4</b> =Packs)
InitialCatalogueCode	Text	Optional code for an initial catalogue to display during order entry (overrides the system-wide setting).
CatalogueGroupCode	Text	Code for the catalogue group this customer is restricted to (as specified in the Group/Catalogue Matrix file).
SalesTaxGroup *1	Text	Option code for the tax group to be used for this customer (used to locate the required entry in the <b>Sales Tax Matrix</b> file).
ProductExclusionCode	Text	Code for the product exclusions for this customer/delivery address number (as specified in the Product Exclusions file).
MinOrdValue	Decimal	The minimum order value to be used when working with this customer (a zero value means “use the value specified for your currencies”). <b>Please note: this field is only used by CloudCart at present.</b>
PaymentType	Text	For future use.

Field	Data Type	Description
SettlementDiscount	Decimal	For future use.
UserField06	Text	User-defined field to be displayed against the customer
UserField07	Text	User-defined field to be displayed against the customer
UserField08	Text	User-defined field to be displayed against the customer
UserField09	Text	User-defined field to be displayed against the customer
UserField10	Text	User-defined field to be displayed against the customer
UserField11	Text	User-defined field to be displayed against the customer
UserField12	Text	User-defined field to be displayed against the customer
UserField13	Text	User-defined field to be displayed against the customer
UserField14	Text	User-defined field to be displayed against the customer
UserField15	Text	User-defined field to be displayed against the customer
UserField16	Text	User-defined field to be displayed against the customer
UserField17	Text	User-defined field to be displayed against the customer
UserField18	Text	User-defined field to be displayed against the customer
UserField19	Text	User-defined field to be displayed against the customer
UserField20	Text	User-defined field to be displayed against the customer
LanguageCode	Text	Alternate language to use for this customer (as specified in the <b>Languages</b> file).
Area Code	Text	This Code is used to tie a customer to a carrier or surcharge

\*1 These fields are only used by the **Comprehensive Pricing** functionality.

## Customer Discount Codes

A discount code can be stored against a customer. This code is used to tie the customer to a discount matrix.

The file should contain one code per line. Each code should be unique within the file.

Field	Data Type	Description
Code	Text	Discount code. This code is not displayed in Sales Presenter. It is used to tie customers to a discount matrix.
Description	Text	Description. This code is not currently displayed in Sales Presenter.

## Customer Notes

The Customer Accounts file contains a **Notes** field that can be used to display some narrative for each customer.

However, some back-office systems have a comprehensive history of notes that cannot be put into the one field.

This file allows you to create a record for each line of your notes. Sales Presenter will then display this information in the notes section of the Customer Enquiry Balances/Info screen.

A configuration option in your cloud account lets you determine whether the notes for a customer should be displayed in ascending or descending display sequence. This allows for the fact that some users append new notes to the end of a customer history, while others insert them at the start.

The file should contain one account code/display sequence combination per line. Each combination should be unique within the file.

Field	Data Type	Description
AccountCode	Text	Customer account code.

Field	Data Type	Description
DisplaySequence	Number	Display sequence number. Notes can be displayed in either ascending or descending display sequence (configurable in your cloud account). Each record within a customer account must have a unique value for this field.
Notes	Text	The narrative that will be displayed on the Balances/Info screen.

## **Discount Code / Product Matrix**

This file defines the discount to give on customer discount code/product discount code combination for an individual product, a range of products or a product group.

The file should contain one customer discount code / product discount code / group code / from product code / to product code / start date combination per line.

In use, if a product could satisfy two or more entries in the discount matrix then the entry with the latest date is used from the following priority:

- 1) Entry for a blank product group and the produce code is within the from/to product code range.
- 2) Entry for a product group and the from/to product code range is blank.
- 3) Entry for a blank product group and blank from/to product code range.

If an entry isn't found using the primary discount code held against the customer, the checks are performed again using the customers secondary discount code.

Field	Data Type	Description
CustomerDiscountCode	Text	Discount code (as specified in the customer discount codes file).
ProductDiscountCode	Text	Discount code (as specified in the product discount codes file).
GroupCode	Text	Optional product group code as specified in the products file).
FromProductCode	Text	Optional start of a range of product codes.
ToProductCode	Text	Optional end of a range of product codes.
StartDate	Text	Effective start date for this entry (in the format specified in the configuration section of your cloud account). This allows you to schedule future discount changes.
BreakQty1	Decimal	Use the discount from BreakDsc1 when the number of pieces ordered reaches this quantity.
BreakQty2	Decimal	Use the discount from BreakDsc2 when the number of pieces ordered reaches this quantity.
BreakQty3	Decimal	Use the discount from BreakDsc3 when the number of pieces ordered reaches this quantity.
BreakQty4	Decimal	Use the discount from BreakDsc4 when the number of pieces ordered reaches this quantity.
BreakQty5	Decimal	Use the discount from BreakDsc5 when the number of pieces ordered reaches this quantity.
BreakQty6	Decimal	Use the discount from BreakDsc6 when the number of pieces ordered reaches this quantity.
BreakQty7	Decimal	Use the discount from BreakDsc7 when the number of pieces ordered reaches this quantity.
BreakQty8	Decimal	Use the discount from BreakDsc8 when the number of pieces ordered reaches this quantity.
BreakQty9	Decimal	Use the discount from BreakDsc9 when the number of pieces ordered reaches this quantity.
BreakQty10	Decimal	Use the discount from BreakDsc10 when the number of pieces ordered reaches this quantity.

Field	Data Type	Description
		ordered reaches this quantity.
BreakDsc1	Decimal	Discount (as a percentage) to use with BreakQty1.
BreakDsc2	Decimal	Discount (as a percentage) to use with BreakQty2.
BreakDsc3	Decimal	Discount (as a percentage) to use with BreakQty3.
BreakDsc4	Decimal	Discount (as a percentage) to use with BreakQty4.
BreakDsc5	Decimal	Discount (as a percentage) to use with BreakQty5.
BreakDsc6	Decimal	Discount (as a percentage) to use with BreakQty6.
BreakDsc7	Decimal	Discount (as a percentage) to use with BreakQty7.
BreakDsc8	Decimal	Discount (as a percentage) to use with BreakQty8.
BreakDsc9	Decimal	Discount (as a percentage) to use with BreakQty9.
BreakDsc10	Decimal	Discount (as a percentage) to use with BreakQty10.

## Family Codes

As well as working with catalogues, Sales Presenter can show up to five additional drop-down lists of product categories (or family codes). Therefore, a product can exist in up to five families.

This file defines the families themselves, not the products that are in the families.

The file should contain one family code per line. Each family code should be unique within the file.

Field	Data Type	Description
Code	Text	Family code. This code is not displayed in Sales Presenter. It is used to tie products to families.
Description	Text	Family code description. This is the text that is displayed to the user when they're selecting a family code from a list.
ExDescription	Text	Optional extended description to display against a family code if using the <b>PhotoRef</b> field.
DisplaySequence	Number	Optional sequence to display the family codes in. Within the same sequence number (or in the case where no sequence numbers are used) family codes are displayed in ascending <b>Description</b> sequence.
PhotoRef	Text	Optional filename (excluding the file extension) of an image file in your cloud account to associate with the family code. If present, this image will be displayed in the drop-down list when the user wants to select a family code.

## Filter Tree

Users of the account history module can work with a filter tree instead of (or in addition to) family codes.

This allows a full tree structure of products to be created that the user can navigate through to show the desired products.

The tree is made up of branches. Each branch can contain further branches, products or a mixture of the two.

This has greater flexibility than family codes since the same product can exist in any number of different branches.

This file defines the branches of the tree themselves, not the products that are in each branch.

The file should contain one branch code per line. Each branch code should be unique within the file.

Field	Data Type	Description
BranchCode	Text	A unique code within the system, used to identify a branch on

Field	Data Type	Description
		the tree. This code is not displayed in Sales Presenter. It is used to attach further branches and/or products to a branch.
ParentBranchCode	Text	The code for the branch that this branch belongs to. Branches without a parent will be shown when displaying the tree for the first time, or when navigating back to the top level of the tree).
Description	Text	The description for the branch. This is the text that is displayed to the user when they're selecting a branch from the tree.
ExDescription	Text	Optional extended description to display against a branch if using the <b>PhotoRef</b> field.
DisplaySequence	Number	Sequence in which to display the branches. If omitted, branches are displayed in description sequence
PhotoRef	Text	Optional filename (excluding the file extension) of an image file in your cloud account to associate with the branch.

## Filter Tree/Product Matrix

This file defines the products that belong to a branch within the filter tree. By default, products will be shown in the branch in product code sequence. However, you can use an optional display sequence to force an alternate sequence.

The file should contain one branch code / product code combination per line. A product can appear in any number of branches.

Field	Data Type	Description
BranchCode	Text	Branch code (as specified in the <b>Filter Tree</b> file).
ProductCode	Text	Product code (as specified in the <b>Products</b> file).
DisplaySequence	Number	Optional sequence to display the products within a branch. Within the same sequence number (or in the case where no sequence numbers are used) products are displayed in ascending product code sequence, by default (this can be re-configured via your cloud account).

## Group/Catalogue Matrix

This file defines the catalogues that belong to a catalogue group. A customer can be restricted to only accessing catalogues that appear in a specific group.

Any catalogue that belongs to one or more groups will be unavailable to any customer that isn't in the same group. Any products in those catalogues will also be unavailable to both customers not in the same group or when accessing products via the product enquiry screen in Sales Presenter.

The file should contain one catalogue group code / catalogue code combination per line. A catalogue can appear in any number of groups.

Field	Data Type	Description
Code	Text	Catalogue group code.
CatalogueCode	Text	Catalogue code (as specified in the catalogues file).

## Languages

This file defines the list of languages that are shown when creating a new customer account within Sales Presenter.

The file should contain one line per language code.

Field	Data Type	Description
Code	Text	Code for the language (corresponds to the <b>LanguageCode</b> field on the <b>Customer Accounts</b> files).
Description	Text	Description for the language, shown in the list of available languages.
DisplaySequence	Number	Optional sequence in which to display the languages when creating a new customer account. Within the same sequence number (or in the case where no sequence numbers are used) languages are displayed in ascending <b>Description</b> sequence.

## Language/Product Matrix

This file defines product descriptions and extended descriptions to be used for a given combination of language code (as configured for the customer account) and product. These descriptions are used on product thumbnails, the product detail screen and on order acknowledgements. If no entry exists for a given combination then the descriptions and extended descriptions from the products are used instead.

The file should contain one language code / product code combination per line.

Field	Data Type	Description
BranchCode	Text	Language code (as specified in the <b>Languages</b> file).
ProductCode	Text	Product code (as specified in the <b>Products</b> file).
Description	Text	Description of the product.
ExDescription	Text	Extended description of the product. A narrative that will be displayed on the product detail screen

## Last Price Paid

The last price paid by a customer for a product would be displayed in the pop-up list of prices during order entry.

The file should contain one line per account code and product code combination.

Field	Data Type	Description
AccountCode	Text	Customer account code.
ProductCode	Text	Product code.
Price	Decimal	Price paid by the customer.

## Ledger Codes

This file is used in conjunction with the Ledgers file.

If you are able to extract ledger codes from your back-office system as part of your ledger data then this file is used to supply descriptions for the codes. The descriptions are then displayed in Sales Presenter when viewing the ledger information.

The file should contain one ledger code per line. Each code should be unique within the file.

Field	Data Type	Description
Code	Text	Ledger code used in your back-office system.
Description	Text	Description of the code that is used in your back-office system.

## Ledgers

This typically gives a transaction by transaction breakdown of the customers outstanding balance.

This information is used purely for display purposes on the customer account enquiry screen. Therefore you can populate as few or as many fields as you wish.

The file should contain one line per account code, transaction code and transaction date combination.

Field	Data Type	Description
AccountCode	Text	Customer account code.
InternalRef	Text	Your reference number for the transaction.
TransCode	Text	A code for the type of transaction, if available from your back-office system. If provided, the description from the "Ledger Codes" CSV file will be displayed. If not provided, the contents of <b>Description</b> below will be displayed.
TransDate	Date	Date of the transaction (in the format specified in the configuration section of your cloud account).
ExternalRef	Text	Your customers reference number for the transaction.
Description	Text	A description of the type of transaction (e.g. CREDIT, PAYMENT) if not providing a value for <b>TransCode</b> .
TransValue	Decimal	The value of the transaction.
Discount	Decimal	Any discount value relating to the transaction.
CashPaid	Decimal	Any amount paid by the customer, relating to the transaction.
DueDate	Date	Date that any payment is due (in the format specified in the configuration section of your cloud account).
CurrencyCode	Text	The currency code or description used for this transaction.
TaxValue	Decimal	Any tax/VAT amount relating to this transaction.

## Linked Products

This file defines a ways of linking related products together (for example, a lamp and a range of shades that can go with the lamp). When viewing a product the user can quickly browse to any of the related products.

The file should contain one product code / linked product code combination per line.

Field	Data Type	Description
ProductCode	Text	Product code (as specified in the products file) that has a product linked to it.
LinkedProductCode	Text	Product code (as specified in the products file) that you wish to link to the product specified in the <b>ProductCode</b> field.
DisplaySequence	Number	Optional sequence in which to display the linked products. The products are displayed in ascending numeric sequence. Within the same sequence number (or in the case where no sequence numbers are used) products are displayed in ascending product code sequence.
QtyMultiplier	Decimal	Unused – for future use

## Locations

You must provide data for at least one location (such as “on the road” or “at exhibition”). The user selects the desired location during the Sales Presenter login process. Any orders raised will be recorded against that location. The location is also printed on the order acknowledgement.

The file should contain one location code per line. Each location code should be unique within the file.

Field	Data Type	Description
Code	Text	Location code. This code is not displayed in Sales Presenter.
Name	Text	Location description. This is the text that is displayed to the user during the login process and on the order acknowledgement.
Discount	Decimal	Optional additional discount to be added to existing discounting logic when taking orders at this location (e.g. offering additional 10% discount at a particular trade show).

## Order Analysis Codes

Sales Presenter allows up to five analysis fields to be recorded against an order and up to five more against each line on an order. These can be configured to allow the user to type in the required value or select a value from a lookup, can appear on the order acknowledgement and can be passed through to a back-office system.

This file defines the analysis codes/values that are displayed in the lookups for each of the analysis fields (if required), for the specified order types. If the order type is omitted then the analysis code/value applies to all order types.

For the purposes of this file, values of 1 to 5 for the **FieldNumber** field relate to the five analysis fields on an order and values of 6 to 10 relate to the five analysis fields on an order line.

The field titles can be set as required via the configuration section of the Blue Alligator cloud account.

The file should contain one line per field number/analysis code combination.

Field	Data Type	Description
FieldNumber	Number	Analysis field (1-5) that this code relates to.
Code	Text	Analysis code. This code is not displayed in Sales Presenter. It can be passed from the cloud to the back-office system order import process.
OrderType	Text	<b>O</b> =Order, <b>Q</b> =Quote, <b>I</b> =Invoice, <b>C</b> =Credit Note. If omitted then the <b>FieldNumber/Code</b> combination applies to all order types.
Description	Text	This is the text that is displayed to the user when they're selecting a code from a list.

Field	Data Type	Description
DisplaySequence	Number	Optional sequence to display the analysis codes in. Within the same sequence number (or in the case where no sequence numbers are used) codes are displayed in ascending <b>Description</b> sequence.

## Order History

This file contains a list of sales orders from the back-office system. These can be viewed in Sales Presenter and copied to form the basis of a new order.

The file should contain one order per line. Each order number should be unique within the file.

Field	Data Type	Description
OrderNumber	Number	Unique number within the back-office system for the order
AccountCode	Text	The customer account code the order relates to
AddressNo	Number	The delivery address number used for this order
OrderDate	Text	The date the order was placed, in the format specified in the configuration section of your cloud account
DueDate	Text	Due date for the order, in the format specified in the configuration section of your cloud account
CancelDate	Text	Cancel by date for the order, in the format specified in the configuration section of your cloud account
OrderType	Text	A single letter to specify the type of order ("O" = Order, "Q" = Quote, "I" = Invoice, "C" = Credit Note)
RepCode	Text	Code for the sales rep that took the order
LocationCode	Text	Code for the location that the order was taken in
CustomerRef	Text	Optional reference given by the customer for this order
SpecialInstructions	Text	Optional additional information given by the customer for the order
Status	Text	Free-format text to indicate the status of the order in the back-office system
UserField01 *1	Text	The code (when using lookups) or text relating to the first analysis field on the order for orders that were originally raised in Sales Presenter
UserField02 *1	Text	The code (when using lookups) or text relating to the second analysis field on the order for orders that were originally raised in Sales Presenter
UserField03 *1	Text	The code (when using lookups) or text relating to the third analysis field on the order for orders that were originally raised in Sales Presenter
UserField04 *1	Text	The code (when using lookups) or text relating to the fourth analysis field on the order for orders that were originally raised in Sales Presenter
UserField05 *1	Text	The code (when using lookups) or text relating to the fifth analysis field on the order for orders that were originally raised in Sales Presenter

\*1 see the documentation section of the support forum for more information regarding the use of Order Analysis Codes.

## Order Line History

This file contains a list of sales orders lines that relate to the order history from the back-office system. These can be viewed in Sales Presenter and copied to form the basis of a new order.

The file should contain one line per order line on the order. Each order number/line number combination should be unique within the file.

Field	Data Type	Description
OrderNumber	Number	Unique number within the back-office system for the order
LineNumber	Number	Unique number within the order to identify the line
MasterLineNumber	Number	For order lines that were linked to a “master” line using the linked product feature within Sales Presenter when originally raising the order, set this to the value of the <b>LineNumber</b> field from the line this one is linked to.  For all other types of order line set this to the same value as the <b>LineNumber</b> field.
ProductCode	Text	Product being ordered
GrossSellPrice	Decimal	The gross selling price for a single item (piece)
DueDate	Text	Due date for the order line, in the format specified in the configuration section of your cloud account
CancelDate	Text	Cancel by date for the order line, in the format specified in the configuration section of your cloud account
SpecialInstructions	Text	Optional additional information given by the customer for the order line
OrderedQty	Decimal	Total quantity (in pieces) ordered for this order line
DeliveredQty	Decimal	Total quantity (in pieces) that have so far been delivered for this order line
Discount	Decimal	Amount of discount (as a percentage) given for this order line
PriceSource *2	Number	Used for optional analysis purposes, this field contains the method of pricing used for the order line
QtyEntryUnit	Number	The unit that was used to order by. 1=Pieces, 2=Cartons, 3=Inners, 4=Packs
UserField01 *1	Text	The code (when using lookups) or text relating to the first analysis field on the order line for orders that were originally raised in Sales Presenter
UserField02 *1	Text	The code (when using lookups) or text relating to the second analysis field on the order line for orders that were originally raised in Sales Presenter
UserField03 *1	Text	The code (when using lookups) or text relating to the third analysis field on the order line for orders that were originally raised in Sales Presenter
UserField04 *1	Text	The code (when using lookups) or text relating to the fourth analysis field on the order line for orders that were originally raised in Sales Presenter
UserField05 *1	Text	The code (when using lookups) or text relating to the fifth analysis field on the order line for orders that were originally raised in Sales Presenter
StdPrice	Decimal	Optional record of the standard price when the line was raised. For future use.

\*1 see the documentation section of the support forum for more information regarding the use of Order Analysis Codes.

\*2 a price source is recorded against each line on an order. It indicates the method of pricing that was used for the line. Some back-office systems, such as the Blue Alligator **X~Suite** ERP system, use this information for analysis purposes. The value should be one of the following:

Value	Description
5	Standard selling price was used
10	Stream 1 price was used
11	Stream 2 price was used
12	Stream 3 price was used
13	Stream 4 price was used
14	Stream 5 price was used
15	Stream 6 price was used
16	Stream 7 price was used
17	Stream 8 price was used
18	Stream 9 price was used
19	Stream 10 price was used
30	Last price was used
50	Price was manually entered by the sales rep
60	Clearance price was used
70	Promotional price was used
80	Cost price was used
90	Minimum price was used

### **Price Lists**

A price list code can be stored against a customer. This code is used to tie customers to a price list.

The file should contain one code per line. Each code should be unique within the file.

You can also create a price list that has a currency code as its price list code. When looking for a product on a price list, Sales Presenter will first check the price list code stored against the customer. If the product is not found on that price list then Sales Presenter will check a price list whose code is the currency code stored against the customer. If no entries are found on either price list then the prices held against the product are used.

Field	Data Type	Description
Code	Text	Price list code. This code is not displayed in Sales Presenter. It is used to tie customers to a price list.
Description	Text	Description. This code is not currently displayed in Sales Presenter.
CurrencyCode	Text	The currency code to be used for the price list.
ApplyDiscount	Text	Y/N (Yes/No) value to indicate whether discounts can be applied when using this price list. Values of 1, Y, YES or TRUE indicate that they can be applied. All other values indicate that discounts cannot be applied.

### **Price List / Product Matrix**

This file defines the prices on a price list for individual products.

The file should contain one price list code / product code / start date combination per line. A product can appear in any number of price lists.

Field	Data Type	Description
PriceListCode	Text	Price list code (as specified in the price lists file).
ProductCode	Text	Product code (as specified in the products file).
StartDate	Text	Effective start date for this price list entry (in the format specified in the configuration section of your cloud account). This allows you to schedule future price changes.

Field	Data Type	Description
StdPrice *1	Decimal	Standard selling price for a piece.
MinPrice *1	Decimal	Minimum selling price for a piece.
ClearancePrice *1	Decimal	Clearance price for a piece.
StreamPrice1 *1	Decimal	Additional selling price for a piece.
StreamPrice2 *1	Decimal	Additional selling price for a piece.
StreamPrice3 *1	Decimal	Additional selling price for a piece.
StreamPrice4 *1	Decimal	Additional selling price for a piece.
StreamPrice5 *1	Decimal	Additional selling price for a piece.
StreamPrice6 *1	Decimal	Additional selling price for a piece.
StreamPrice7 *1	Decimal	Additional selling price for a piece.
StreamPrice8 *1	Decimal	Additional selling price for a piece.
StreamPrice9 *1	Decimal	Additional selling price for a piece.
StreamPrice10 *1	Decimal	Additional selling price for a piece.
BreakQty1 *2	Decimal	Use the discount/price from BreakDsc1 when the number of pieces ordered reaches this quantity.
BreakQty2 *2	Decimal	Use the discount/price from BreakDsc2 when the number of pieces ordered reaches this quantity.
BreakQty3 *2	Decimal	Use the discount/price from BreakDsc3 when the number of pieces ordered reaches this quantity.
BreakQty4 *2	Decimal	Use the discount/price from BreakDsc4 when the number of pieces ordered reaches this quantity.
BreakQty5 *2	Decimal	Use the discount/price from BreakDsc5 when the number of pieces ordered reaches this quantity.
BreakQty6 *2	Decimal	Use the discount/price from BreakDsc6 when the number of pieces ordered reaches this quantity.
BreakQty7 *2	Decimal	Use the discount/price from BreakDsc7 when the number of pieces ordered reaches this quantity.
BreakQty8 *2	Decimal	Use the discount/price from BreakDsc8 when the number of pieces ordered reaches this quantity.
BreakQty9 *2	Decimal	Use the discount/price from BreakDsc9 when the number of pieces ordered reaches this quantity.
BreakQty10 *2	Decimal	Use the discount/price from BreakDsc10 when the number of pieces ordered reaches this quantity.
BreakDsc1 *3	Decimal	Discount/price to use with BreakQty1.
BreakDsc2 *3	Decimal	Discount/price to use with BreakQty2.
BreakDsc3 *3	Decimal	Discount/price to use with BreakQty3.
BreakDsc4 *3	Decimal	Discount/price to use with BreakQty4.
BreakDsc5 *3	Decimal	Discount/price to use with BreakQty5.
BreakDsc6 *3	Decimal	Discount/price to use with BreakQty6.
BreakDsc7 *3	Decimal	Discount/price to use with BreakQty7.
BreakDsc8 *3	Decimal	Discount/price to use with BreakQty8.
BreakDsc9 *3	Decimal	Discount/price to use with BreakQty9.
BreakDsc10 *3	Decimal	Discount/price to use with BreakQty10.

\*1 if omitted, the corresponding price from the product is used instead.

\*2 quantity/discount breaks are only used if the **UseQtyBreaks** field is set for a customer.

\*3 a configuration setting in the cloud account determines whether the discount fields contain a discount percentage or a new selling price.

## Product Types

This is used to show the type of product for carriage charging purposes.

The file should contain one line per product type.

Field	Data Type	Description
Code	Text	Code for the product type
Description	Text	Description for the product type

## Products

This file defines the products that the user can browse and place orders for.

The file should contain one product code per line.

The actual prompts that the user sees within Sales Presenter against the various prices can be configured from within your cloud account.

Field	Data Type	Description
ProductCode	Text	Unique code for a product within the system.
Description	Text	Description of the product.
UOM	Text	Text (unit of measure) for a piece (single item) of this product, such as "EACH".
QtyPerCarton	Decimal	Number of pieces within a carton. Use a default value of 1 if you are not providing this value.
QtyPerInner	Decimal	Number of pieces within an inner. Use a default value of 1 if you are not providing this value.
QtyPerPack	Decimal	Number of pieces within a pack. Use a default value of 1 if you are not providing this value.
StdPrice	Decimal	Standard selling price for a piece.
MinPrice	Decimal	Minimum selling price for a piece.
CostPrice	Decimal	Cost price for a piece.
PromoPrice	Decimal	Promotional price for a piece.
ClearancePrice	Decimal	Clearance price for a piece.
RRP	Decimal	Recommended retail price. Used for information purposes only.
DefOrdQty	Decimal	Default order quantity (in pieces). Used for information purposes only.
MinOrdQty	Decimal	Minimum order quantity (in pieces). Used for information purposes only.
OrdMultiple	Decimal	Order multiple (in pieces). Used for information purposes only.
SalesYTD	Decimal	Quantity (in pieces) sold so far this year (year to date).
SalesLYR	Decimal	Quantity (in pieces) sold last year.
StkQty	Decimal	Quantity (in pieces) currently in stock.
OnSOQty	Decimal	Quantity (in pieces) currently on sales orders.
OnPOQty	Decimal	Quantity (in pieces) currently on purchase orders.
NextPODue	Text	Date that the quantity on purchase orders are due to be available to sell.
DoNotSell	Text	Y/N (Yes/No) value to indicate whether a product is on hold. Useful for products that you wish to view but not actually sell.
CartonVolume	Decimal	Carton volume. Used for information purposes only.
ProhibitDiscount	Text	Y/N (Yes/No) value to indicate whether to prohibit discounts on this product. Values of 1, Y, YES or TRUE indicate that

Field	Data Type	Description
		they are prohibited. All other values indicate that discounts can be applied.
ExDescription	Text	Extended description of the product. A narrative that will be displayed on the product detail screen
Barcode	Text	The barcode value that can optionally be printed against the product on the order acknowledgement.
FamilyCode1	Text	1 <sup>st</sup> optional family code to be used to categorise the product.
FamilyCode2	Text	2 <sup>nd</sup> optional family code to be used to categorise the product.
FamilyCode3	Text	3 <sup>rd</sup> optional family code to be used to categorise the product.
FamilyCode4	Text	4 <sup>th</sup> optional family code to be used to categorise the product.
FamilyCode5	Text	5 <sup>th</sup> optional family code to be used to categorise the product.
GroupCode	Text	Code for the product group that this product belongs to.
StreamPrice1	Decimal	Additional selling price for a piece.
StreamPrice2	Decimal	Additional selling price for a piece.
StreamPrice3	Decimal	Additional selling price for a piece.
StreamPrice4	Decimal	Additional selling price for a piece.
StreamPrice5	Decimal	Additional selling price for a piece.
StreamPrice6	Decimal	Additional selling price for a piece.
StreamPrice7	Decimal	Additional selling price for a piece.
StreamPrice8	Decimal	Additional selling price for a piece.
StreamPrice9	Decimal	Additional selling price for a piece.
StreamPrice10	Decimal	Additional selling price for a piece.
DiscountCode	Text	Code for the discount matrix to use for this product. This field is only used by the <b>Comprehensive Pricing</b> functionality.
UserField01	Text	User-defined field that can be displayed on the product detail screen
UserField02	Text	User-defined field that can be displayed on the product detail screen
UserField03	Text	User-defined field that can be displayed on the product detail screen
UserField04	Text	User-defined field that can be displayed on the product detail screen
UserField05	Text	User-defined field that can be displayed on the product detail screen
PhotoRef *1	Text	Optional code to be used to a product image rather than using the product code. Useful if you want to re-use the same image for several products.
StkQty2	Decimal	Optional additional quantity (in pieces) to add to <b>StkQty</b> to form the current quantity in stock. This is useful when the stock figures are being held in different fields within the back-office system but need to be combined to give the overall stock figure.
SalesTaxCode	Text	Optional code to be used for this product (used to locate the required entry in the <b>Sales Tax Matrix</b> file).
MovieRef *1	Text	Optional code to be used to reference a product movie rather than using the product code. Useful if you want to re-use the same movie for several products.
DocumentRef *1	Text	Optional code to be used to reference a product PDF rather than using the product code. Useful if you want to re-use the same PDF for several products.
AudioRef *1	Text	Optional code to be used to reference a product audio clip rather than using the product code. Useful if you want to re-use the same audio clip for several products.
UserField06	Text	User-defined field that can be displayed on the product detail screen
UserField07	Text	User-defined field that can be displayed on the product detail screen

Field	Data Type	Description
		screen
UserField08	Text	User-defined field that can be displayed on the product detail screen
UserField09	Text	User-defined field that can be displayed on the product detail screen
UserField10	Text	User-defined field that can be displayed on the product detail screen
UserField11	Text	User-defined field that can be displayed on the product detail screen
UserField12	Text	User-defined field that can be displayed on the product detail screen
UserField13	Text	User-defined field that can be displayed on the product detail screen
UserField14	Text	User-defined field that can be displayed on the product detail screen
UserField15	Text	User-defined field that can be displayed on the product detail screen
UserField16	Text	User-defined field that can be displayed on the product detail screen
UserField17	Text	User-defined field that can be displayed on the product detail screen
UserField18	Text	User-defined field that can be displayed on the product detail screen
UserField19	Text	User-defined field that can be displayed on the product detail screen
UserField20	Text	User-defined field that can be displayed on the product detail screen
ProductType	Text	Optional code to be used for this product (used to specify the type of product in the <b>Product Types</b> file).
CartonWgt	Decimal	This is the weight of the product.

\*1 These fields can accept a semi-colon delimited list of codes. This allows you to specify codes for several images, movies, documents and audio clips to use with the one product.

## Product Discount Codes

A discount code can be stored against a product. This code is used to tie the product to a discount matrix.

The file should contain one code per line. Each code should be unique within the file.

Field	Data Type	Description
Code	Text	Discount code. This code is not displayed in Sales Presenter. It is used to tie products to a discount matrix.
Description	Text	Description. This code is not currently displayed in Sales Presenter.

## Product Exclusions

By default, a customer has access to all products within your cloud account that the sales rep can access (see the Product Group Rep Exclusions import file format for details on excluding products on a rep by rep basis).

This file should contain one line for each group code/family code1/family code2/family code3/family code4/family code5/product code combination that you wish to exclude for a given product exclusion code. The same product exclusion code can exist in any number of lines within the file.

During order entry, Sales Presenter takes the product exclusion code specified for the delivery address(es) an order is being raised for and checks against this file to see if any exclusions exist.

Field	Data Type	Description
ProductExclusionCode	Text	Code for this exclusion (as specified on the customer record)
GroupCode	Text	Product group to consider for exclusion
FamilyCode1	Text	Family code 1 to consider for exclusion
FamilyCode2	Text	Family code 2 to consider for exclusion
FamilyCode3	Text	Family code 3 to consider for exclusion
FamilyCode4	Text	Family code 4 to consider for exclusion
FamilyCode5	Text	Family code 5 to consider for exclusion
ProductCode	Text	Product code to consider for exclusion

For a product to be excluded during order entry, it must satisfy all fields for an entry within this file. For example, if an entry exists in this file for product exclusion code ABC and that entry only has the FamilyCode1 and FamilyCode3 fields populated, only products that match both those FamilyCode1 and FamilyCode3 values will be excluded when working with a customer using the exclusion code ABC.

## Product Family Codes

While there are family code fields within the product file, there may be situations where it is not possible to include these fields within the file itself (such as when product data is being extracted from a back-office system that doesn't use family codes or product categories). If this is the case then this file can be used to define the family codes for a product.

The file should contain one product code per line.

Field	Data Type	Description
ProductCode	Text	The product code to associate the family codes with.
FamilyCode1	Text	1 <sup>st</sup> optional family code to be used to categorise the product.
FamilyCode2	Text	2 <sup>nd</sup> optional family code to be used to categorise the product.
FamilyCode3	Text	3 <sup>rd</sup> optional family code to be used to categorise the product.
FamilyCode4	Text	4 <sup>th</sup> optional family code to be used to categorise the product.
FamilyCode5	Text	5 <sup>th</sup> optional family code to be used to categorise the product.

## Product Group Rep Exclusions

By default, a rep has access to all products within your cloud account. This file can be used to exclude reps from accessing products from certain product groups, family codes, individual product codes or combinations thereof.

This file should contain one rep code/product group/family code/product code combination per line for each combination that the rep is excluded from. Each combination should be unique within the file.

If using these exclusions you should also configure the rep restrictions for each of the devices in your cloud account.

Field	Data Type	Description
RepCode	Text	The rep code (as specified in the RepCode field on the Reps file) for which this exclusion applies.
GroupCode	Text	Optional. The product group (as specified in the GroupCode field on the Products file) for which this exclusion applies.
FamilyCode1	Text	Optional. The family code 1 for which this exclusion applies.
FamilyCode2	Text	Optional. The family code 2 for which this exclusion applies.
FamilyCode3	Text	Optional. The family code 3 for which this exclusion applies.

Field	Data Type	Description
FamilyCode4	Text	Optional. The family code 4 for which this exclusion applies.
FamilyCode5	Text	Optional. The family code 5 for which this exclusion applies.
ProductCode	Text	Optional. The product code for which this exclusion applies (if wishing to exclude individual products).

## Reps

You must provide data for at least one sales rep. The user selects the desired rep during the Sales Presenter login process. Any orders raised will be recorded against that sales rep. The rep is also printed on the order acknowledgement.

The file should contain one rep per line. Each rep code should be unique within the file. The various “prohibit” fields can be omitted if you do not wish to place any restrictions on what reps can do.

Field	Data Type	Description
Code	Text	Rep code. This code is not displayed in Sales Presenter.
Name	Text	Rep name. This is the text that is displayed to the user during the login process and on the order acknowledgement.
ProhibitUnitOverride *1	Text	Yes/No value to indicate whether to prohibit the overriding of the quantity entry unit by this rep.
ProhibitPriceOverride *1	Text	Yes/No value to indicate whether to prohibit the overriding of prices by this rep.
ProhibitDiscountOverride *1	Text	Yes/No value to indicate whether to prohibit the overriding of discounts by this rep.
ProhibitSalesLYR	Text	Yes/No value to indicate whether to prohibit the viewing of the product Sales Last Year figures by this rep. Values of 1, Y, YES or TRUE indicate that it is prohibited. For all other values (or if omitted) the rep can view these figures.
ProhibitSalesYTD	Text	Yes/No value to indicate whether to prohibit the viewing of the product Sales Year To Date figures by this rep. Values of 1, Y, YES or TRUE indicate that it is prohibited. For all other values (or if omitted) the rep can view these figures.
ProhibitClearancePrice *2	Text	Yes/No value to indicate whether to prohibit the display and selection of clearance prices for this rep.
ProhibitCostPrice *2	Text	Yes/No value to indicate whether to prohibit the display and selection of cost prices for this rep.
ProhibitPromoPrice *2	Text	Yes/No value to indicate whether to prohibit the display and selection of promotional prices for this rep.
ProhibitMinPrice *2	Text	Yes/No value to indicate whether to prohibit the display and selection of minimum prices for this rep.
ProhibitStreamPrice1 *2	Text	Yes/No value to indicate whether to prohibit the display and selection of stream price 1 for this rep.
ProhibitStreamPrice2 *2	Text	Yes/No value to indicate whether to prohibit the display and selection of stream price 2 for this rep.
ProhibitStreamPrice3 *2	Text	Yes/No value to indicate whether to prohibit the display and selection of stream price 3 for this rep.
ProhibitStreamPrice4 *2	Text	Yes/No value to indicate whether to prohibit the display and selection of stream price 4 for this rep.
ProhibitStreamPrice5 *2	Text	Yes/No value to indicate whether to prohibit the display and selection of stream price 5 for this rep.
ProhibitStreamPrice6 *2	Text	Yes/No value to indicate whether to prohibit the display and selection of stream price 6 for this rep.
ProhibitStreamPrice7 *2	Text	Yes/No value to indicate whether to prohibit the display and selection of stream price 7 for this rep.
ProhibitStreamPrice8 *2	Text	Yes/No value to indicate whether to prohibit the display and

Field	Data Type	Description
		selection of stream price 8 for this rep.
ProhibitStreamPrice9 *2	Text	Yes/No value to indicate whether to prohibit the display and selection of stream price 9 for this rep.
ProhibitStreamPrice10 *2	Text	Yes/No value to indicate whether to prohibit the display and selection of stream price 10 for this rep.
EmailAddress	Text	Email address for the rep - for use with the order acknowledgement email.
PhoneNo	Text	Telephone number for the rep - for use with the order acknowledgement email.
FaxNo	Text	Fax number for the rep – for use with the order acknowledgement email.
MobileNo	Text	Mobile number for the rep – for use with the order acknowledgement email.
LoginPassword	Text	An optional rep specific password that the user needs to type in on the login screen within Sales Presenter (available on iPad devices only).
MaxDiscount	Decimal	Maximum discount permitted to be entered by this rep. Omitting this field or supplying 0 (zero) means no restriction in place (set the <b>ProhibitDiscountOverride</b> field to prevent the rep from entering any discounts).

\*1 Values of 1, Y, YES or TRUE indicate that the overriding of this field it is prohibited. For all other values (or if omitted) the system-wide settings (as specified in the configuration section of your cloud account) are used instead.

\*2 Values of 1, Y, YES or TRUE indicate that the display and selection of this price is prohibited. For all other values (or if omitted) the rep can view and select this price.

## Sales Tax Groups

This file allows you to specify the list of tax groups to be shown in Sales Presenter when creating a new customer account.

The file should contain one tax group per line.

Field	Data Type	Description
GroupCode	Text	A code for the tax group to be recorded against the customer account.
Description	Text	Description of the tax group to be shown in the list.
DisplaySequence	Number	Number in which to show the tax groups in the list.

## Sales Tax Matrix

This file allows you to specify the tax rates to be used for combinations of tax group (as specified in the SalesTaxGroup field on the Customer Accounts file) and tax code (as specified in the SalesTaxCode field on the Product file).

The file should contain one tax group/tax code combination per line.

Field	Data Type	Description
SalesTaxGroup	Text	Tax group (as specified in the customer accounts file).
SalesTaxCode	Text	Tax code (as specified in the product file).
Description	Text	Descriptive text that can optionally appear on order acknowledgements.
Rate	Decimal	Amount of tax (as a percentage) to be applied to order line values for this group/code combination

### **Standard Narratives**

This file allows you to create a list of special instructions that can be used during order entry (such as “AM delivery only”). The user can either select one of the narratives from this list or type in their own.

The file should contain one narrative per line.

Field	Data Type	Description
Narrative	Text	Text that can be used as the special instructions on an order.
DisplaySequence	Number	Optional sequence in which to display the narratives. The narratives are displayed in ascending numeric sequence. Within the same sequence number (or in the case where no sequence numbers are used) narratives are displayed in alphabetical sequence.

End of document