



Unit: Data Migration Tools

Topic: DTW – Business Partners



In this exercise you will import master data for business partners, using the Data Transfer Workbench. You will also import data into user-defined fields added to the business partners object.

Note: You can import business partner master data using the Import from Excel utility; however, not every field can be imported using the Import from Excel utility, and you cannot import into user-defined fields.

1. Setup requirements for the master data

1.1. Create business partner groups

Note: You need to create the business partner groups before you import the master data.

Choose *Administration* → *Setup* → *Business Partners* → *Customer Groups*.

Add two new customer groups:

- Stadiums
- Hotels

Run a query on the **OCRG** table to see the group codes in your system. You will need to import these codes with the master data.

Make a note of the group codes:

Suppliers	
Stadiums	
Hotels	

1.2. Add user defined fields to the business partners object

Choose *Tools* → *Customization Tools* → *User-Defined Fields – Management*.

Select *Master Data* > *Business Partner* > *Business Partner*.

Enter the following data:

Field Name or Data Type	Values
<i>Title</i>	Stmt
<i>Description</i>	Statement Required?
<i>Type</i>	Alphanumeric
<i>Structure</i>	Regular
	You will import a value into the new field; however, you can optionally set a list of values now: None, Monthly, Quarterly, Every 6 months, Annually

Add a second UDF.

Enter the following data:

Field Name or Data Type	Values
<i>Title</i>	Format
<i>Description</i>	Statement Format
<i>Type</i>	Alphanumeric
<i>Structure</i>	Regular
	You can optionally set a list of values: Email, Fax, Mail

2. Prepare the DTW spreadsheets

From the DTW templates folder, choose *Business Partners* → *Business Partner Master Data*.

You will use more than one template to import the data:

- OCRD – BusinessPartners for the header
- OCPR – ContactEmployees for the contact information

The business partners to be imported are:

	Sound Systems Ltd.	Global Electronics Corp	London Coliseum	MAX Hotel Group
<i>BP Group</i>	Suppliers	Suppliers	Stadiums and Exhibitions	Hotels
<i>Type</i>	Supplier	Supplier	Customer	Customer
<i>Currency</i>	Local currency	Foreign currency	Local currency	Foreign currency
<i>Contact name</i>	Terry Adams	Robert Chang	1. Mary Burton 2. Simon Howell	3. Mr James Smith 4. Ms Jean Green
<i>Contact phone number</i>	0207 600400	1 415 634 0002	012 345 6792	1860 345 6791
<i>Bill-to address</i>	123 Commercial St, Southend ES1 2AB Essex England	Building 1 900 Mission Rd San Francisco CA 94110 USA	6 Upmarket St W1 200, London UK	46 Broad St Dublin Ireland

<i>Ship-to address</i>	123 Commercial St, Southend ES1 2AB Essex	Building 2 900 Mission Rd San Francisco CA 94110	1 Park Plaza W1 200, London	2 EastGate Dublin Ireland
<i>Payment Method</i>	Bank Transfer	Bank Transfer	Bank Transfer	Bank Transfer
<i>Statement Required?</i>	Monthly	None	None	Quarterly
<i>Statement Format</i>	Email	Fax	Mail	Email

2.1. Prepare the header template

Open *OCRD - BusinessPartners.xlt*.

Enter each business partner on a separate row in the template:

Field	Description
<i>CardCode</i>	Enter a valid code
<i>CardName</i>	The business partner name
<i>CardType</i>	<i>cCustomer, cSupplier, or Clid</i> (customer, vendor, lead) Note: the default is customer
<i>GroupCode</i>	From the OCRG table
<i>Address</i>	The bill-to street
<i>City</i>	The bill-to city or town
<i>County</i>	The bill-to county
<i>Zipcode</i>	The bill-to postcode
<i>MailAddress</i>	The ship-to street
<i>MailCity</i>	The ship-to city or town
<i>MailCounty</i>	The ship-to county
<i>MailZipCode</i>	The ship-to postcode
<i>Phone1</i>	Main telephone
<i>FederalTaxID</i>	The tax id, if applicable for your localization
<i>PriceListNum</i>	Price list for business partner
<i>Currency</i>	From the currencies table OCRN. Note: the default is the local currency.
<i>DefaultAccount</i>	The bank account number for the business partner
<i>DefaultBankCode</i>	The bank code for the business partner.

<i>Website</i>	The web site for the business partner
<i>U_Stmnt</i>	At the end of the template, add a column for the user-defined field. Enter the field name U_Stmnt on the first row, then enter the required value from the table in step 2.
<i>U_Format</i>	At the end of the template, add a column for the user-defined field. Enter the field name U_Format on the first row, then enter the required value from the table in step 2
	Enter any other fields required for your localization.

Save the template as a .csv file.

2.2. Prepare the contact information spreadsheet

Open *OCPR – ContactEmployees.xlt*.

Enter a row for each contact name. If there are multiple contacts for a business partner, enter each one on a separate row, using the same ParentKey:

Field	Description
<i>ParentKey</i>	<i>CardCode</i> of the relevant parent template
<i>LineNum</i>	Leave this column empty. Note: When updating contact information you must enter the <i>LineNum</i> as 0, 1, 2, etc.
<i>Name</i>	The first and last name of the contact.
<i>Phone 1</i>	Phone number of contact.
<i>Title</i>	Title (if any)
<i>E_Mail</i>	E-mail address
	Enter any other fields required for your localization.

Save the file as .csv type.

3 Master data import

In the Data Transfer Workbench, choose **Import** → **Master Data** → **Add New Data**.

In DTW, Choose **Business Partners** → **Business Partner Master Data**.

Link the *OCRD – BusinessPartners.csv* file to the parent node.

Link the *OCPR – ContactEmployees.csv* file to the *ContactEmployees* node.

Choose **Run Simulation**.

If any error messages are shown, check the log file.

Tip: if you cannot resolve an error, try importing just the header file. If that is successful in the simulation, add the other files one by one.

After you have corrected your files, choose the **Back** button to re-run the import simulation.

If the simulation is successful, go to the next step and choose **Import**.

When all the records have been successfully imported, open the business partner master data to verify the imported records in SAP Business One.
