

# ProMaster → Cin7 Importer: User Guide

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## 1. Overview

The **ProMaster → Cin7 Importer** is a smart link between your ProMaster job exports and Cin7.

It automatically builds accurate, GST-ready Sales Orders directly inside Cin7 - saving time and preventing manual entry errors.

Once configured, it:

- Reads ProMaster exports (.csv files).
  - Checks all product codes against Cin7.
  - Applies approved product substitutions.
  - Matches each job to the right customer, sales rep, and branch.
  - Pushes the finished Sales Order directly into Cin7.
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## 2. Step-by-Step Use

### 1 Upload your ProMaster file(s)

Export your job from ProMaster in the standard format:

Q33654.S2\_ShipmentProductWithCostsAndPrice.csv

The importer automatically extracts:

- **Customer PO Number:** Q33654
- **Order Reference:** Q33654.S2

You can upload one or several ProMaster files - they will all merge into a single output automatically.

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### 2 Substitutions (Smart Swaps)

The importer automatically loads the official substitution list from the repo (Substitutes.xlsx).

If a part in your upload has a known substitute, you'll be prompted:

1460-3077CNS can be substituted with LCP18949.  
Swap? [Keep Original] [Swap to Substitute]

Choose whether to keep the original or apply the substitution - the system updates the item instantly before the order is sent to Cin7.

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### 3 Auto-Matching with Cin7

The importer checks every **PartCode** from ProMaster against the **Code** field in Cin7 (Products.csv).

It also looks up the **Account Number / Company Name** from ProMaster inside Cin7's Contacts via the API.  
This automatically fills in:

- **Project Name**
  - **Sales Rep**
  - **Customer ID (Member ID)**
  - **Branch**
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### 4 Add Internal Comments

Each order reference includes its own comment box.  
Comments are added to the "Internal Comments" field in Cin7 for context and follow-up by the team.

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### 5 Review and Export

After processing, you'll see a combined table showing all your orders.  
You can review the data or download the CSV for audit purposes before pushing to Cin7.

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### 6 Push to Cin7

Click  **Push to Cin7 Sales Order** to create the orders in Cin7.

Each successfully created order will display a confirmation with its Cin7 ID and reference:

✓ 1 Sales Order created (Cin7 ID 188796)

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### 3. What Happens Automatically

- **ETD:** Set to 2 days from upload date.
  - **Price Tier:** Always set to “Trade (NZD – Excl)”.
  - **Tax:** GST applied automatically at 15%.
  - **Branch:**
    - Hamilton for Charlotte Meyer
    - Avondale for all other sales reps
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### 4. The Importance of Matching Account Codes

This part is critical.

In **ProMaster**, every line includes an AccountNumber - for example:

Arco Group Ltd - ARCO04

In **Cin7**, every customer also has an **Account Number** (found under *Contacts* → *Account Number*).

When the importer runs, it uses this value to match customers between systems:

"where": "company='Arco Group Ltd - ARCO04'"

If the two do **not** match perfectly:

- The app can't identify the right customer.
- The Sales Rep and Project Name can't be linked.
- The order may appear under “Unknown” or duplicate customers in Cin7.

#### ✓ Correct Example

System	Field	Value
ProMaster	AccountNumber	Arco Group Ltd - ARCO04
Cin7	Account Number	ARCO04

#### ✗ Incorrect Example

System	Field	Value
ProMaster	AccountNumber	Arco Group Ltd - ARCO4 ( <i>missing 0</i> )
Cin7	Account Number	ARCO04

**Result:** Order won't match - you'll need to correct the account number in ProMaster before re-importing.

**In short:** Matching account codes = clean customer data and accurate reporting.  
Mismatched account codes = double entries and manual clean-up later.

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## 5. Best-Practice Checklist

- ✓ Make sure **Account Numbers** match between ProMaster and Cin7.
  - ✓ Keep Products.csv and Substitutes.xlsx up to date in the repo.
  - ✓ Use the correct file naming convention for ProMaster exports.
  - ✓ Add internal comments to track order details.
  - ✓ Review substitution prompts carefully before pushing to Cin7.
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## 6. What's Coming Next

- 📄 **Purchase Order integration** (same one-click push logic).
- 📧 **Email notifications** for confirmed uploads.
- 🗂️ **Activity log** for tracking who uploaded each job.
- 📅 **Editable ETD and status stages** before submitting to Cin7.