

Mitie Import

Open Spreadsheet sent in by Mitie.

Ctrl + C on Column F “Product Code”.

Click “Paste” drop down on top ribbon.

Click “Paste Values” – “Values & Number Formatting” (middle icon, this removes the formula but keeps the v

Delete column E “Product” (Must be done after previous step).

Delete ‘empty’ fields under list – all empty boxes that are outlined – highlight and “Delete” (top ribbon).

Check postcode in NAV – if shipping card exists populate code in Column Q “Ship-to code”.

Note: if code less than 4 characters add a ‘ before the 0 at the start.

Check customer number is always C002203 – they are prone to mistyping as C002003, backdate on sheet i

Check product code is correct – they are prone to mistyping DEI0020 as DE10020.

Save as – Company drive Automated sales order uploads Mitie.

Change “Save as type” to CSV (Comma delimited).

Change “File name” to Mitie + Region + date + no. of orders e.g. “Mitie North West 230124 (5 orders).

Save.

Close file (you will not be able to import the next part if you still have the file open).

In NAV search box, Search “Mitie Import”.

OK.

Choose the file you saved.

OK – check import quantity matches number of orders.

Orders to be completed in NAV, choose location, check stock, check delivery instructions, arrange haulage.

NOTE:

The import looks through all previous orders on the spreadsheet and imports any with external doc number t

All external doc numbers consist of blanket PO number followed by the prefix (order requesters initials and t

If the external doc number already exists in NAV, (SO/SINV or archive) the system will not import it.

Check column U for consolidated loads. If consolidated click “mixed full loads” in NAV to ensure price looks

The system automatically ticks Moffet Mouny and adds in MM req notes to additional comments, this should
Add notes to call 24 hours prior for full & half loads as is our standard process.