

Importing the ESPO Catalogue into CMIS Accounts

Select **Accounts | Data | Creditors**

If not already listed, add the ESPO Suppliers details and click on **New**

Go to the main ESPO website www.espo.org and select the menu option 'Downloads'. Find the link to 'CMIS disk', right click and select 'Save target as'. Enter the folder where you want to save the file e.g. C:\temp and click on save.

From CMIS, with the supplier **ESPO** highlighted, click on the **Catalogue** button. Click on **Import** and select **Import text file**

Use the 'Look in' box to locate the path containing the catalogue e.g. C:\temp
Type *.* in the 'File name' box and click on **Open**

Highlight the catalogue file ESPOCMIS.csv in the CMIS folder and click on **Open**
The file will then be loaded and the list of the items in the catalogue will be displayed.

Note: If you already have catalogue items entered for this supplier, the system checks for existing 'codes'. These items are identified in the list with 'Modify' in front of the detail.

If you wish to overwrite the existing details with the latest details in the catalogue you do not need to do anything.

If you wish to retain your existing details, highlight the item and click on the **Discard** button.

To view the new items to be imported you will need to scroll across to the right hand side of the screen.

The **Discard** button can be used to exclude any items not requiring import not just those already on the system.

To discard an item, highlight it and click on **Discard**

Once you are satisfied that you wish to import all the items listed on the screen, click on **OK** to import the catalogue.

If you wish to abandon the import at this stage, click on **Cancel**

If you proceed and click on **OK**, the catalogue will be imported (this may take a few minutes).

Once all the items are imported you can click on **Close**

Then go into Accounts select **Refresh Accounts Data**

This will ensure the new details are updated and ready to use.

Now when raising orders for this creditor, you can use the 'Cat. Item' drop down box to select items from the new catalogue.