


Importing Picking List from Sage To Monday

How to import a picking list created in Sage to a Monday board

 Difficulty **Medium**

 Duration **30 minute(s)**

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Comments

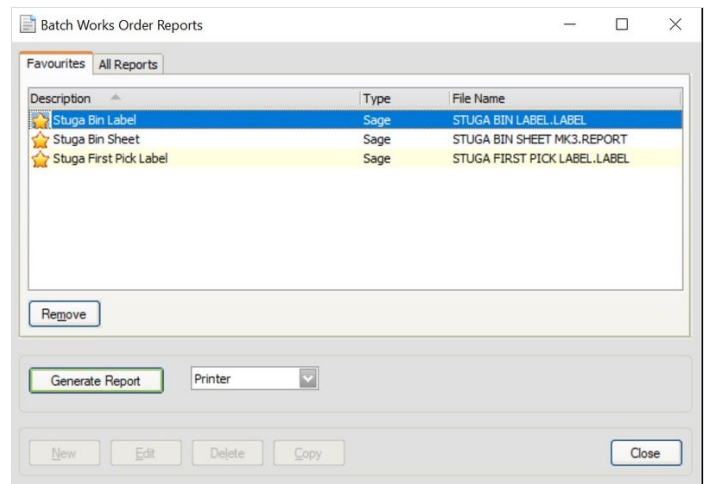
Introduction

This procedure demonstrates how to use the "Sage Hooks" MS Access database to grab the data created in Sage and export to a spreadsheet. The spreadsheet is then imported into a new Monday board, then copied across to the correct Picking List for the machine build.

Step 1 - Allocate the parts for "Pick Run"

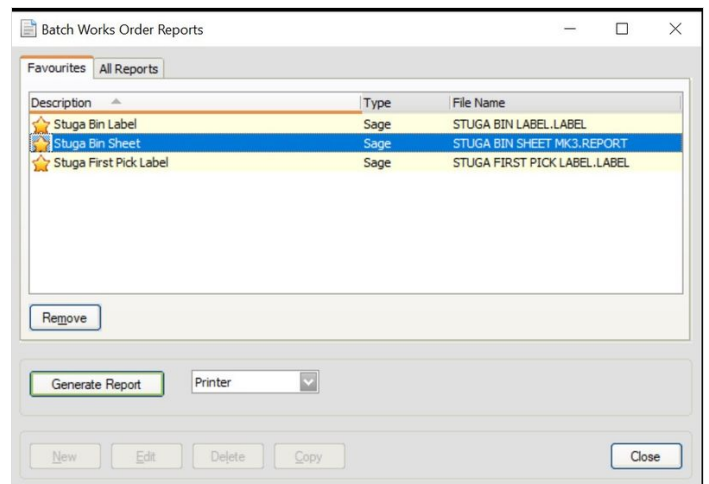
A pick run is a chunk or set of Job Cards that will be picked in a controlled amount. This is normally 10-20 job cards. It is managed in this way to keep the amount of time between the allocation on Sage and the physical pick as short as possible.

Step 2 - Print off the Bin Labels

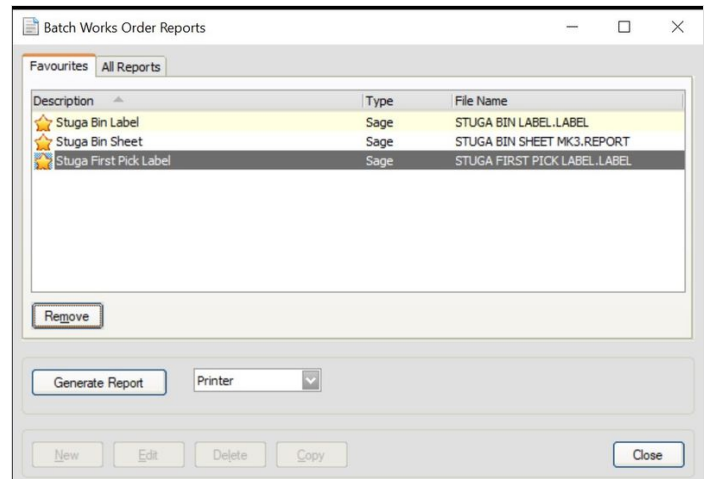


Step 3 - Print off the Bin Sheets

i ...The bin sheets are not going to be used for the build, but they are handy as pictorial reference for the parts



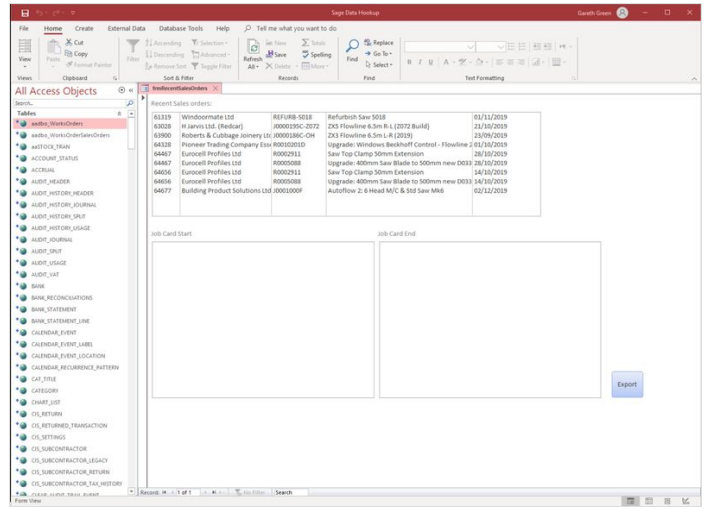
Step 4 - Print the First Pick Labels



Step 5 - Open "Sage Hook" Database

This is located in g:\Sage\Exports

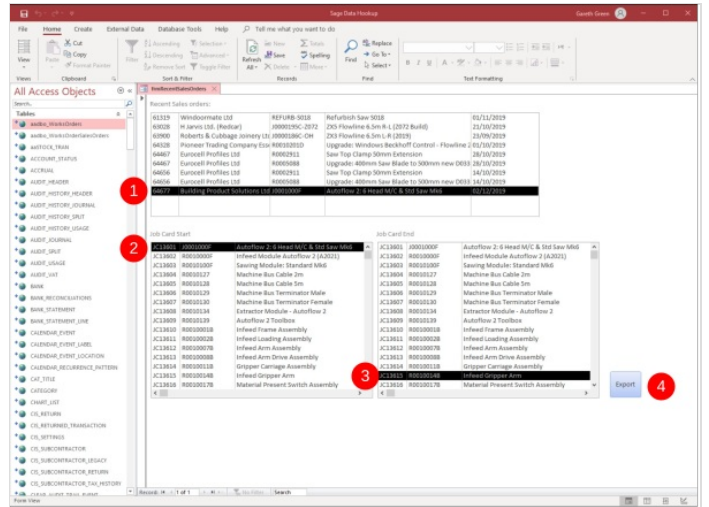
Click "OK" or "Yes" if there is a security question to enable Macros



Step 6 - Select the Job Cards and Export

! ...Make sure the Job Cards chosen in this section match the "Pick Run"

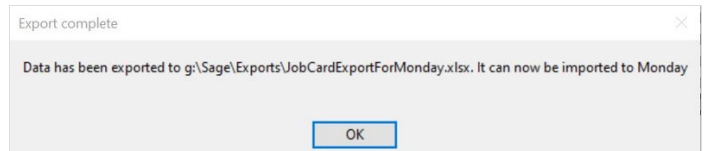
1. Select the Sales order relevant to the build number
2. Select the Starting Job card
3. Select the ending Job Card
4. Click Export
5. Click Yes to overwrite existing file



Step 7 - Wait for Message box

The export may take a few minutes













Click OK




Step 8 - Import the Board on Monday

1. Click on your profile face and then select Import Data
2. Select Excel Document
3. Drag and Drop the file G:\Sage\Exports\JobCardExportForMonday.xlsx from a file explorer window onto the import panel
4. Message when data imported successfully, click on "Let's customize your new board"

Account Exp

-  My profile 
-  **Import data** 1 
-  Integrations 
-  Recycle bin 
-  Archived boards +
-  Admin ↑
-  Teams
-  Log out




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Import Data

Import a new board

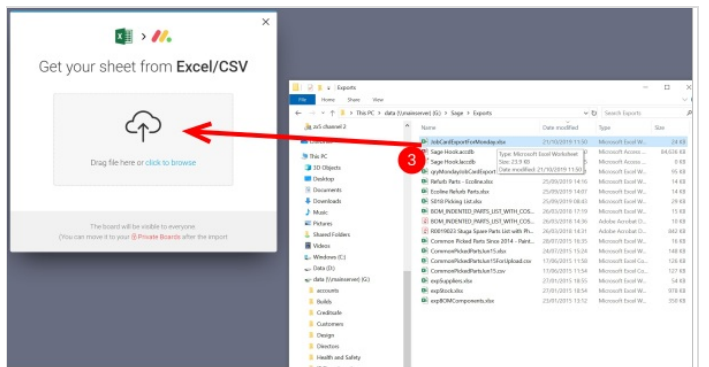
Create a new board with content from other apps



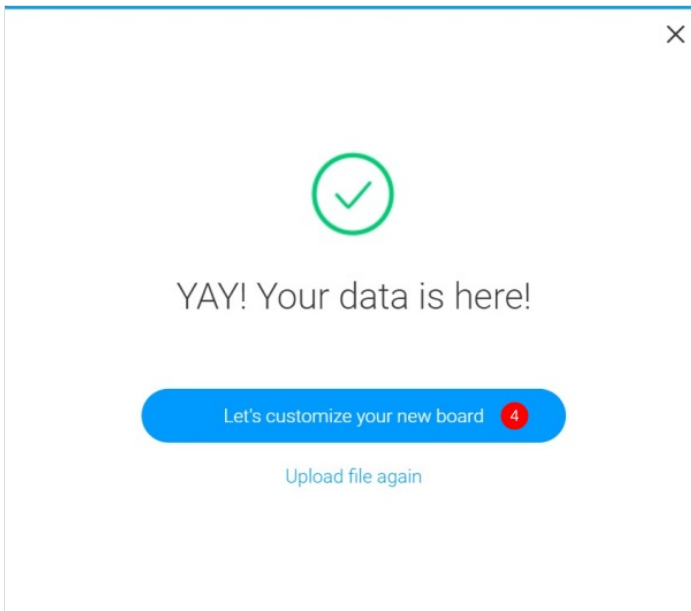
Import any Excel sheet to a new board



Import any Trello board to new board



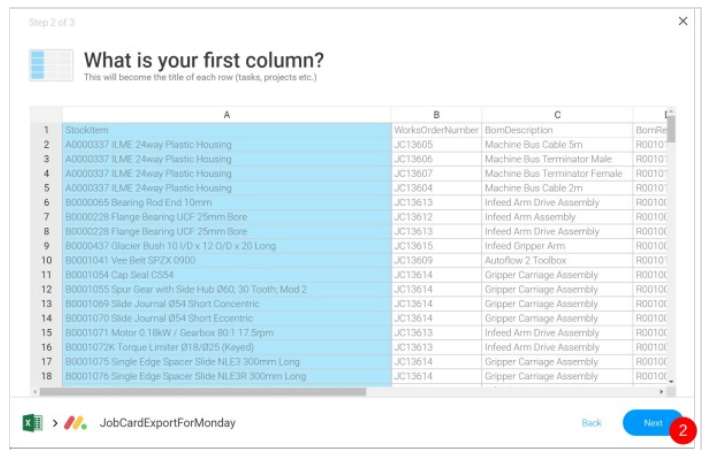
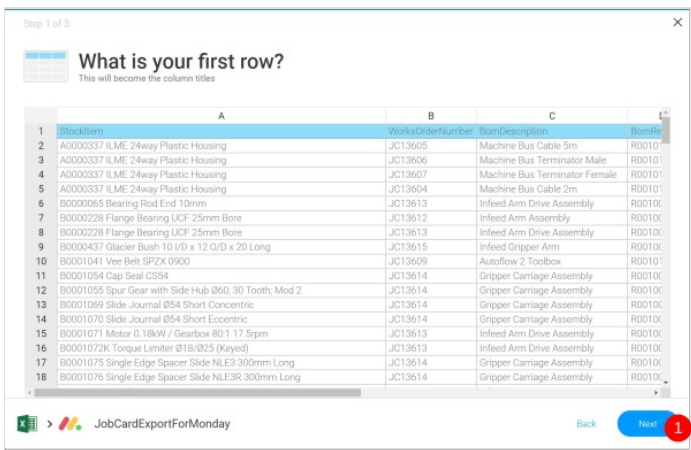
The screenshot shows a dialog box titled "Get your sheet from Excel/CSV" with a cloud upload icon and the text "Drag file here or click to browse". A red arrow points from this dialog to a file explorer window showing a list of files. A red circle highlights a file named "tblCardExport@Monday.xlsx" in the file list.



Step 9 - Set up First Row and Column

These are always left as default

1. Click "Next" for the first row
2. Click "Next" for the first column



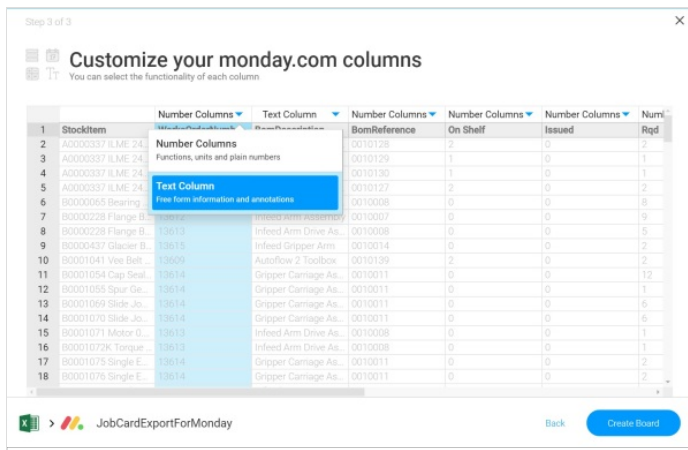
Step 10 - Customise Columns

! ...These steps are the easiest place to make a mistake because Monday does not translate the data properly - you have to tell it what to do. It is critical that this is done correctly

1. Ensure that the following column heading types are changed to a "Text Column". Sometimes Monday gets this right, but in most cases you will need to change it
 - "WorksOrderNumber"
 - "BomDescription"
 - "BomReference"
 - "Supplier"
 - "Supplier_Part_Number"
 - "Location"
 - "OrderNo"
 - "Production Stage"
 - "Finish"

Then click "Create Board"

i ...If you don't get this right, the data is not formatted correctly to add on to picking lists already created, and the next steps will fail. Picture shows an example of odd data formatting if the columns are not customised correctly



Group Title	WorksOrderNumber	BomDescription	BomReference	On Shelf	Rqd	Supplier	SUPPLIER_PART_NO	LOG
A0000018 32mm Conduit Adaptor	13.110	1. Jan	10.314	0	2	Control Component...	SPSQM32(A	
A0000019 32mm Conduit Adaptor	13.110	1. Jan	10.314	0	4	Control Component...	SPSQM32(A	
A0000015 End Cover	13.109	1. Jan	10.314	0	5	Parker Hydraulics &...	SP2 5-10	
A0000016 End Cover	13.109	1. Jan	10.313	0	5	Parker Hydraulics &...	SP2 5-10	
A0000017 Din Rail Skotted	13.110	1. Jan	10.314	0	1	Control Component...	TS 35 S	
A0000017 Din Rail Skotted	13.110	1. Jan	10.314	0	1	Control Component...	TS 35 S	
A0000017 Din Rail Skotted	13.110	1. Jan	10.314	0	1	Control Component...	TS 35 S	
A0000017 Din Rail Skotted	13.110	1. Jan	10.314	0	1	Control Component...	TS 35 S	
A0000020 32mm Conduit Nuts	13.109	1. Jan	10.313	0	4	Control Component...	S2BLN	
A0000020 32mm Conduit Nuts	13.110	1. Jan	10.314	0	2	Control Component...	S2BLN	
A0000027 Flexible Conduit Ø22mm	13.109	1. Jan	10.313	0	9	Control Component...	SPSQ/BL/10M 1	
A0000027 Flexible Conduit Ø22mm	13.110	1. Jan	10.314	0	4	Control Component...	SPSQ/BL/10M 1	
A0000056 Cable Tie 142 x 3.6 white	13.110	1. Jan	10.314	0	1	RS Components	543-412	
A0000018 Flexible Conduit Ø50mm (C...	13.109	1. Jan	10.313	0	4	Control Component...	FPQ305-10M	
A0000019 50mm Conduit Straight Ad...	13.109	1. Jan	10.313	0	2	Control Component...	MFG 50-M45B	
A0000044 Terminal end stops	13.110	1. Jan	10.314	0	5	Parker Hydraulics &...		
A0000044 Terminal end stops	13.109	1. Jan	10.313	0	5	Parker Hydraulics &...		
A0000044 Cable Tie Ø70 x 4.8 black	13.110	1. Jan	10.314	0	1	RS Components	233-483	

Step 11 - Ensure a Picking List Board is Created

! ...It is important that a Picking List board is in existence for the imported data to make sure the correct permissions, automations and Status values are in place

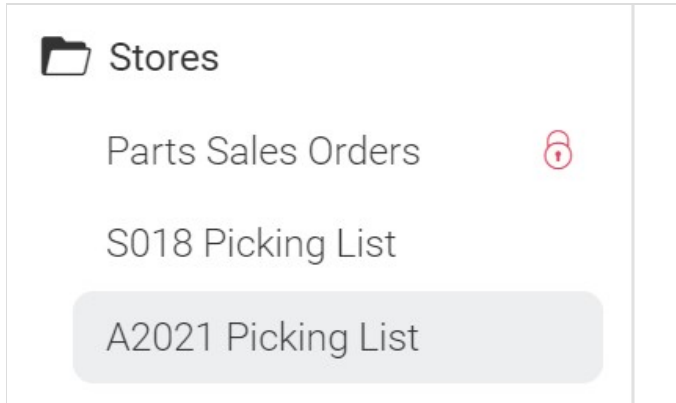
The destination board for a build is labelled:

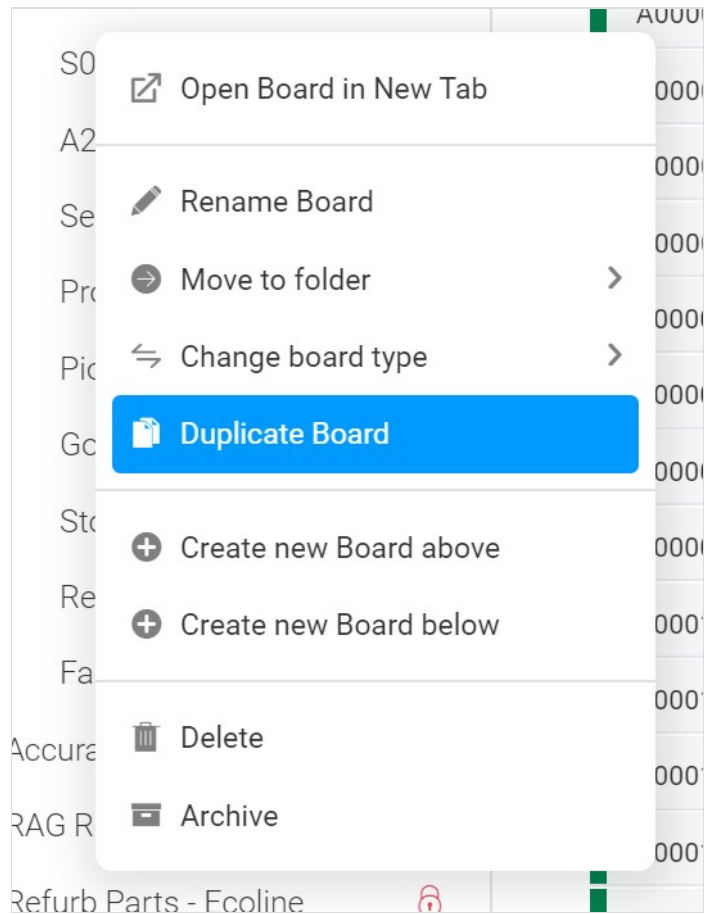


Where Bnnn is the build number for the machine. They should be stored under the 'Stores' folder.

To create a new Picking List, simply duplicate one that is already there, and duplicate the "Structure Only", and click "Keep subscribers"

Then rename it to the correct build number.





Duplicate "S018 Picking List" ×

Select what to duplicate

Structure only

Keep subscribers

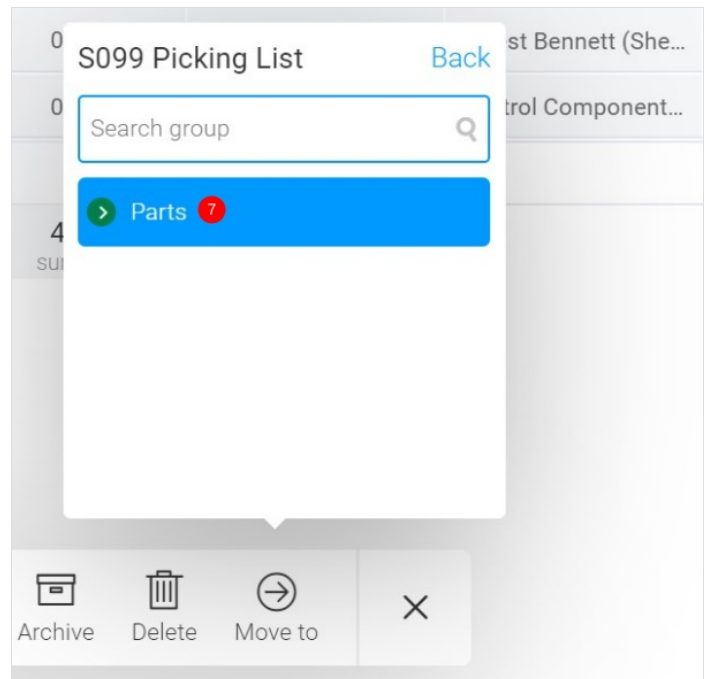
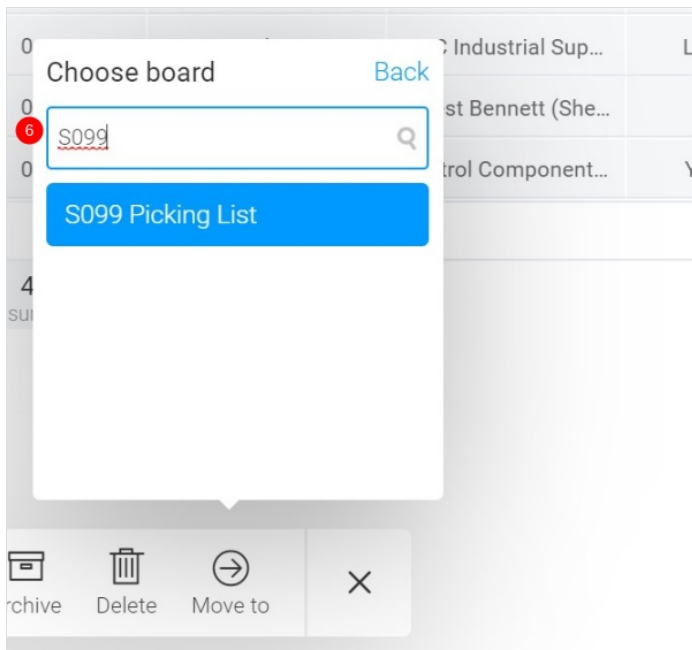
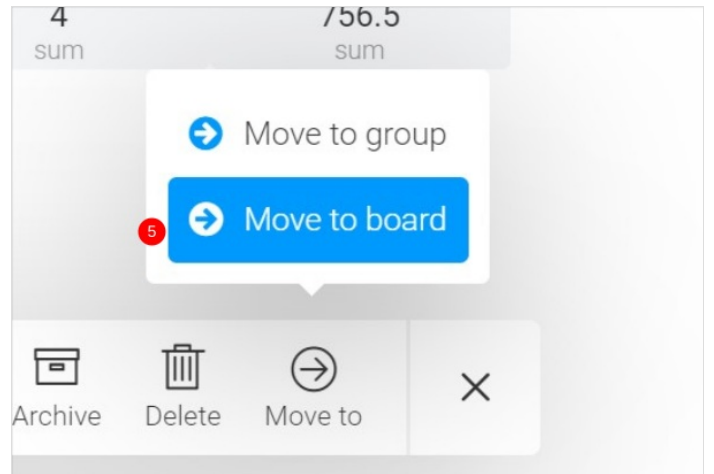
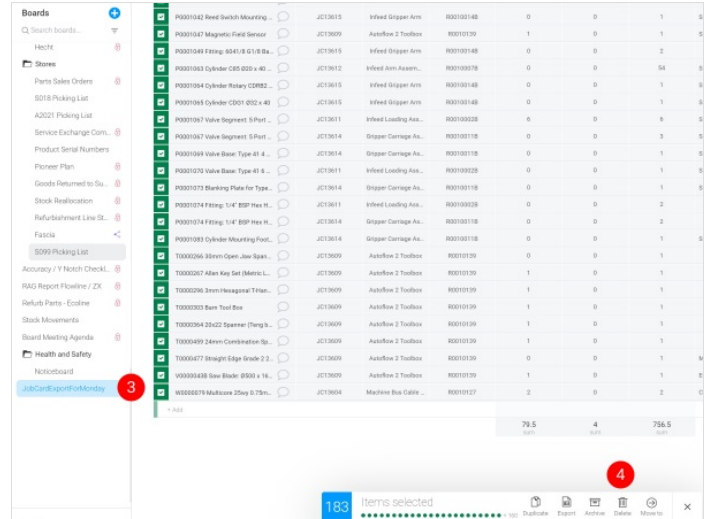
Duplicate

Step 12 - Move the data from the import board to the Picking List

1. Open the JobCardExportForMonday board
2. Select as many items as you can (click the top one)
3. Scroll down to the bottom, hold shift and click the lower one) - note there is a maximum selection limit of 500. If you can't seem to select items, you have tried to select too many.
4. Click Move to
5. Select Move to Board
6. Find the correct board by typing the Build Number and then selecting it
7. Click on the 'Parts' group

The picking list will now be populated with the exported parts

Stores	Group Title	WorksOrderNumber	BomDescriptio
Parts Sales Orders	A0000337 ILME 24way Plasti...	JC13605	Machine Bus Cat
S018 Picking List	A0000337 ILME 24way Plastic Ho...	JC13606	Machine Bus Ter
A2021 Picking List	A0000337 ILME 24way Plastic Ho...	JC13607	Machine Bus Ter
Service Exchange Com...	A0000337 ILME 24way Plastic Ho...	JC13604	Machine Bus Cat
Product Serial Numbers	B0000065 Bearing Rod End 10mm	JC13613	Infeed Arm Drive
Pioneer Plan	B0000228 Flange Bearing UCF 25...	JC13612	Infeed Arm Asse
Goods Returned to Su...	B0000228 Flange Bearing UCF 25...	JC13613	Infeed Arm Drive
Stock Reallocation	B0000437 Glacier Bush 10 I/D x 1...	JC13615	Infeed Gripper A
Refurbishment Line St...	B0001041 Vee Belt SPZX 0900	JC13609	Autoflow 2 Tool
Fascia	B0001054 Cap Seal CSS4	JC13614	Gripper Carriage
S099 Picking List	B0001055 Spur Gear with Side Hu...	JC13614	Gripper Carriage
Accuracy / Y Notch Check...	B0001069 Slide Journal Ø54 Shor...	JC13614	Gripper Carriage
RAG Report Flowline / ZX	B0001070 Slide Journal Ø54 Shor...	JC13614	Gripper Carriage
Refurb Parts - Ecoline	B0001071 Motor 0.18kW / Gearbo...	JC13613	Infeed Arm Drive
Stock Movements	B0001072K Torque Limiter Ø18/Ø...	JC13613	Infeed Arm Drive
Board Meeting Agenda	B0001075 Single Edge Spacer Slid...	JC13614	Gripper Carriage
Health and Safety	B0001076 Single Edge Spacer Slid...	JC13614	Gripper Carriage
Noticeboard	B0001077 Angular Contact Bearin...	JC13615	Infeed Gripper A
JobCardExportForMonday	B0001078 Spur Gear 15 Teeth Mo...	JC13614	Gripper Carriage



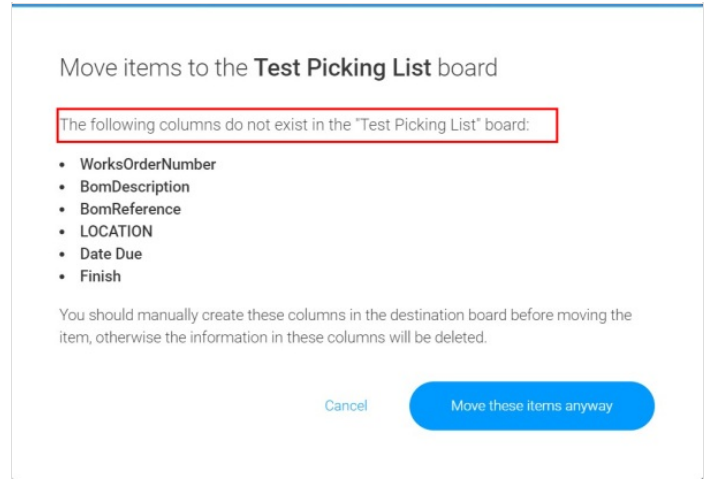
Step 13 - Data Move Errors

If the columns were customised correctly in Step 10, the data will move with no problems.

If not, an warning will appear telling you that "the following columns do not exist"

In this case, you will need to import the spreadsheet again from **Step 8**, and ensure you set all required columns to "Text"

...The exception to this may be the "Date Due" column. IF the file import has a completely blank Data Due column, Monday does not know it is a date format. However, it is safe to move the data and ignore the error because the date will be blank anyway



Step 14 - Delete the empty imported data board

Delete JobCardExportForMonday

