4.5.6. How to Import Data from Fishbowl

In this article we describe:

- correspondence between key terms in Fishbowl and Streamline;
- imported data; and
- the data import workflow.

Key Terms

Key entities that Fishbowl handles are parts and location groups. There are several part types in Fishbowl. Streamline treats parts of the **Inventory** type as items and location groups as locations.
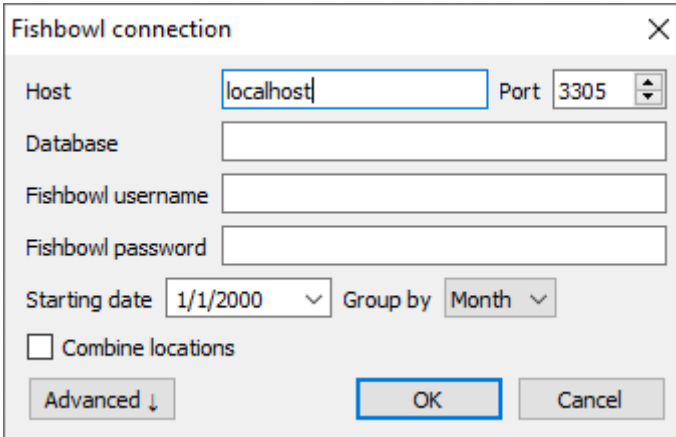
Imported data

Data imported into Streamline is described in the Inventory Management Systems article.

Data Import Workflow

To create a new Streamline project based on Fishbowl data:

1. Go to the menu **File** > **New** > **Fishbowl connection**. The **Fishbowl connection** dialog appears (see figure below).

2. Enter the machine LAN name (or IP) running the Fishbowl Server into the **Host** field. The **localhost** option is set by default meaning that the Fishbowl Server is installed on the same computer where we open Streamline.

3. Specify the port for the MySQL database connection in the **Port** field. Streamline uses the default

Fishbowl port **3305**. If it doesn't work, to find the proper port, complete the following steps:

3.1. Click the Fishbowl server icon in the system tray. The **Fishbowl Server** window opens (see figure below).
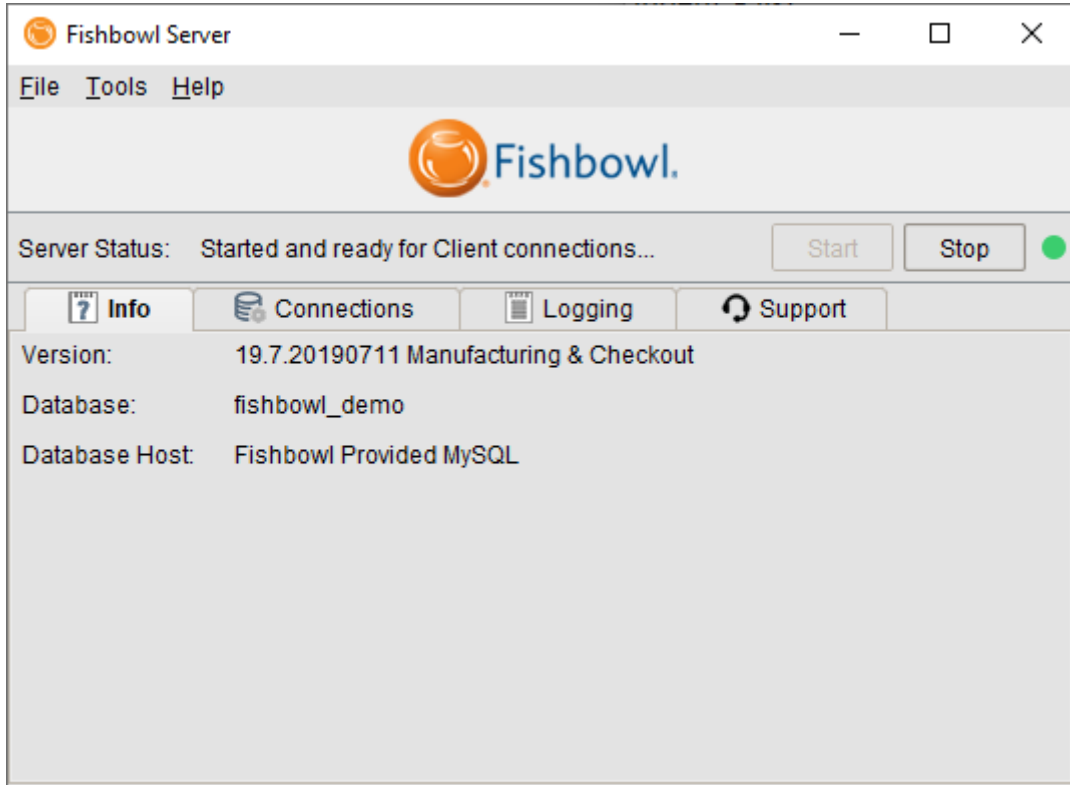

3.2. Go to the menu **Tools** > **Options**. The **Fishbowl Server Administration** window appears (see figure below).
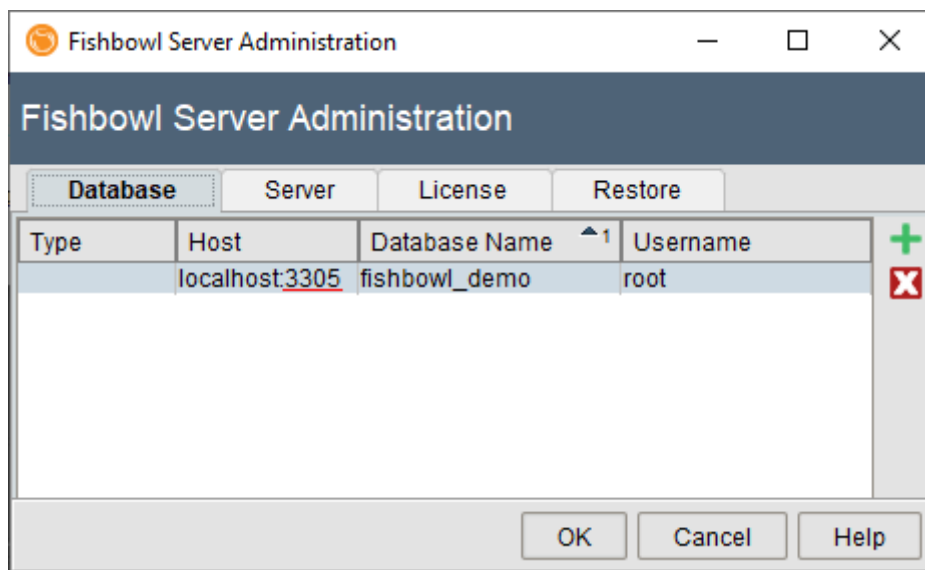

The port is specified after colon in the **Host** column (see figure above).

4. Enter the name of the Fishbowl database you are connecting to into the **Database** field. This one can be found in the **Database name** column of the Fishbowl Server Administration window.

5. Enter the credentials (username and password) of the Fishbowl account that has read permissions into the **Fishbowl username** and **Fishbowl password** fields.

As an example, we created a new user group in Fishbowl called **Streamline rights** and assigned it **View Only** right across all of the Fishbowl modules (see figure below).
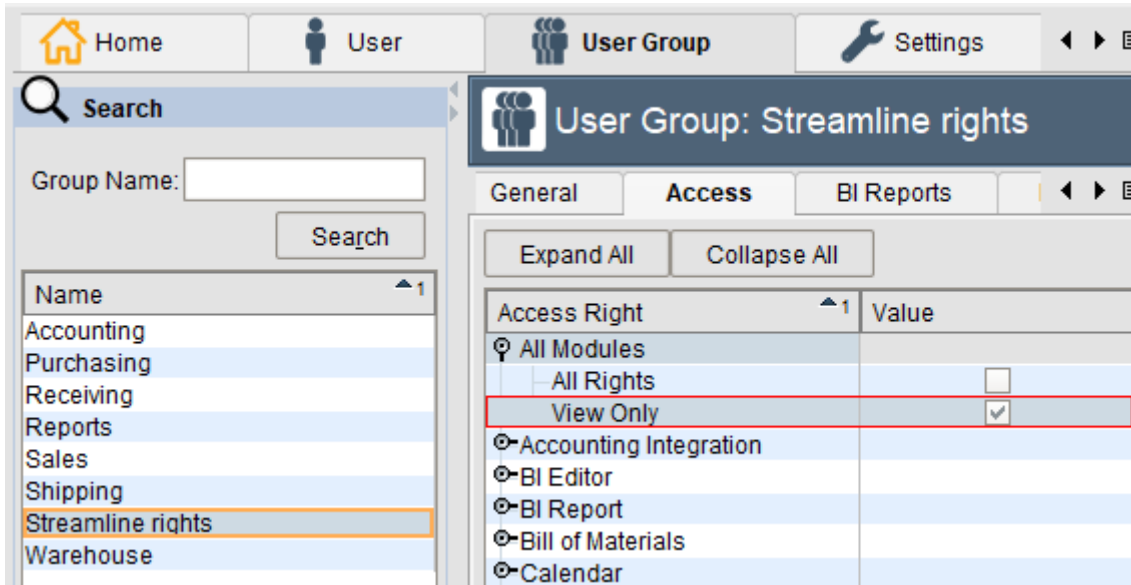
Then, we created a new user called **streamline** and added it to the **Streamline rights** group (see figure below)
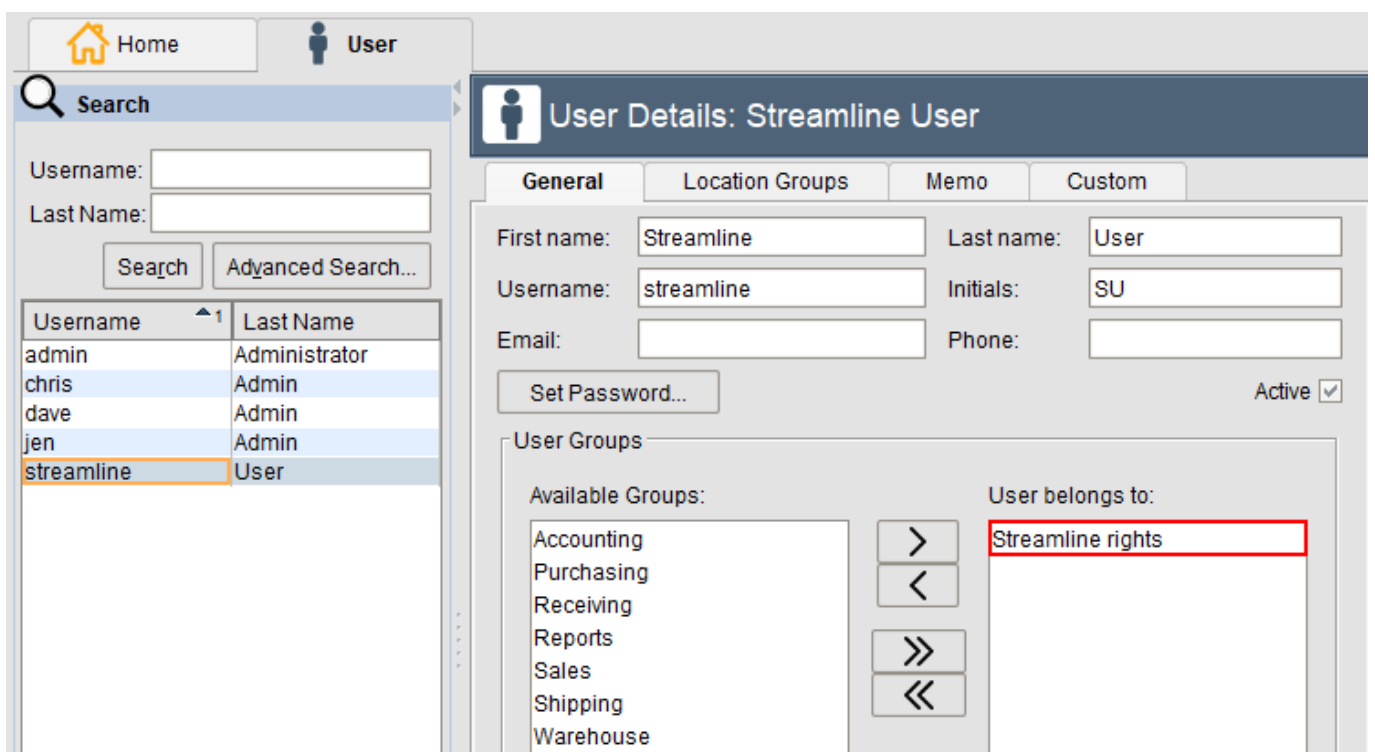
6. Enter or choose the date to start the import from in the **Starting date** control.

To get accurate forecasts, we recommend providing Streamline with at least 24 months of sales history.
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7. Choose the data aggregation period in the **Group by** control. Streamline automatically aggregates your data in the given periods (days, weeks, or months). For example, if you want to see the forecasts, replenishment plans, and other reports in months, group the data by month.

8. Click **OK** to start the import.

The **Advanced** button shows additional settings used to import the data (see figure below). These settings should only be re-configured if defaults don't work.
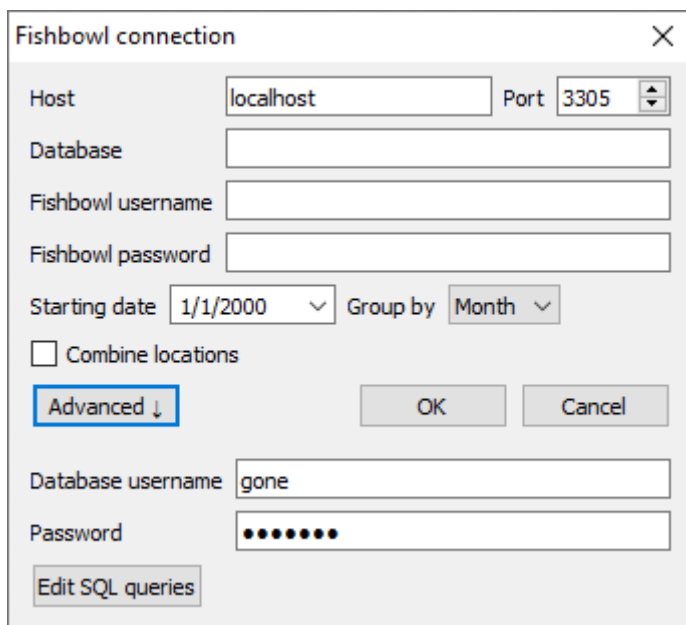

- The **Database username** and **Password** fields set up the credentials of the MySQL user account that read permissions for the database specified in the **Database** field. By default, Streamline is preset with the credentials of the default MySQL user of the Fishbowl DBMS component.

- The **Edit SQL queries** opens the Database connection dialog where you can customize default SQL-queries to meet your requirements.

Import options

The **Combine locations** option allows you to merge all your locations into a single one. This is useful when your warehouses are located next to each other, so they can be planned as a single aggregated warehouse.

Creating Planned Orders

When you first export planned orders into Fishbowl using the **Create** button of the **Planned orders preview** dialog, Streamline shows the message in the figure below.
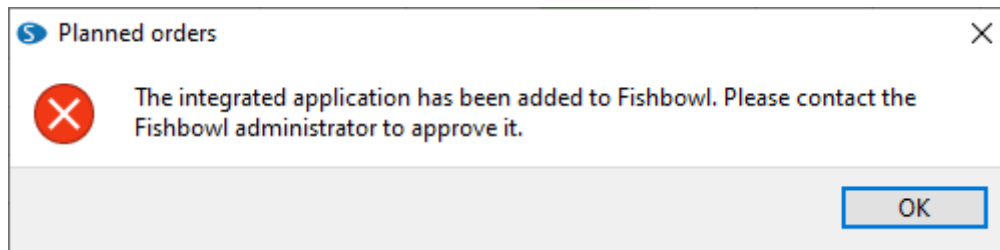

Streamline is saying that it was added to the list of Fishbowl integrated applications and now is waiting for the administrator to approve it. This should be done only once. This also means that previously selected orders were not exported, and you will need to repeat the export again (explained below).

Approving Streamline in Fishsbowl

To approve Streamline:

1. Log in to Fishbowl under administrator.
2. Go to the **Setup** > **Settings** > **Integrated apps**.
3. Select the line with Streamline in the list and click the approve button (see figure below).
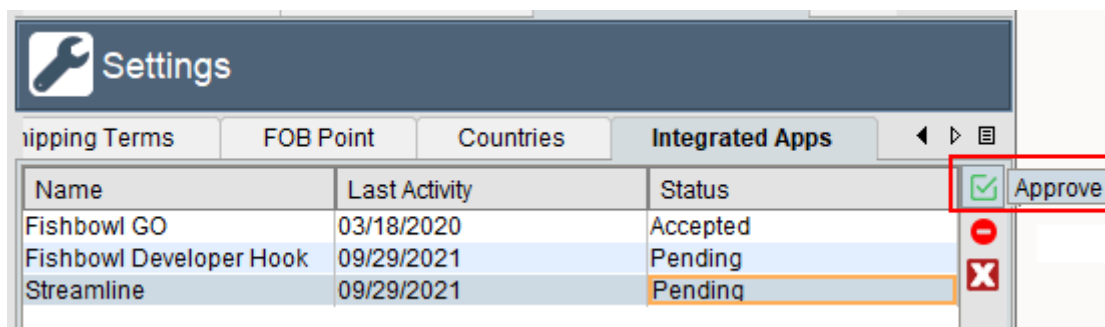
4. Repeat your export by clicking the **Update data** in Streamline and exporting your orders through the **Planned orders preview** dialog.

Only the first export should be repeated. All the future exports will be performed seamlessly.

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