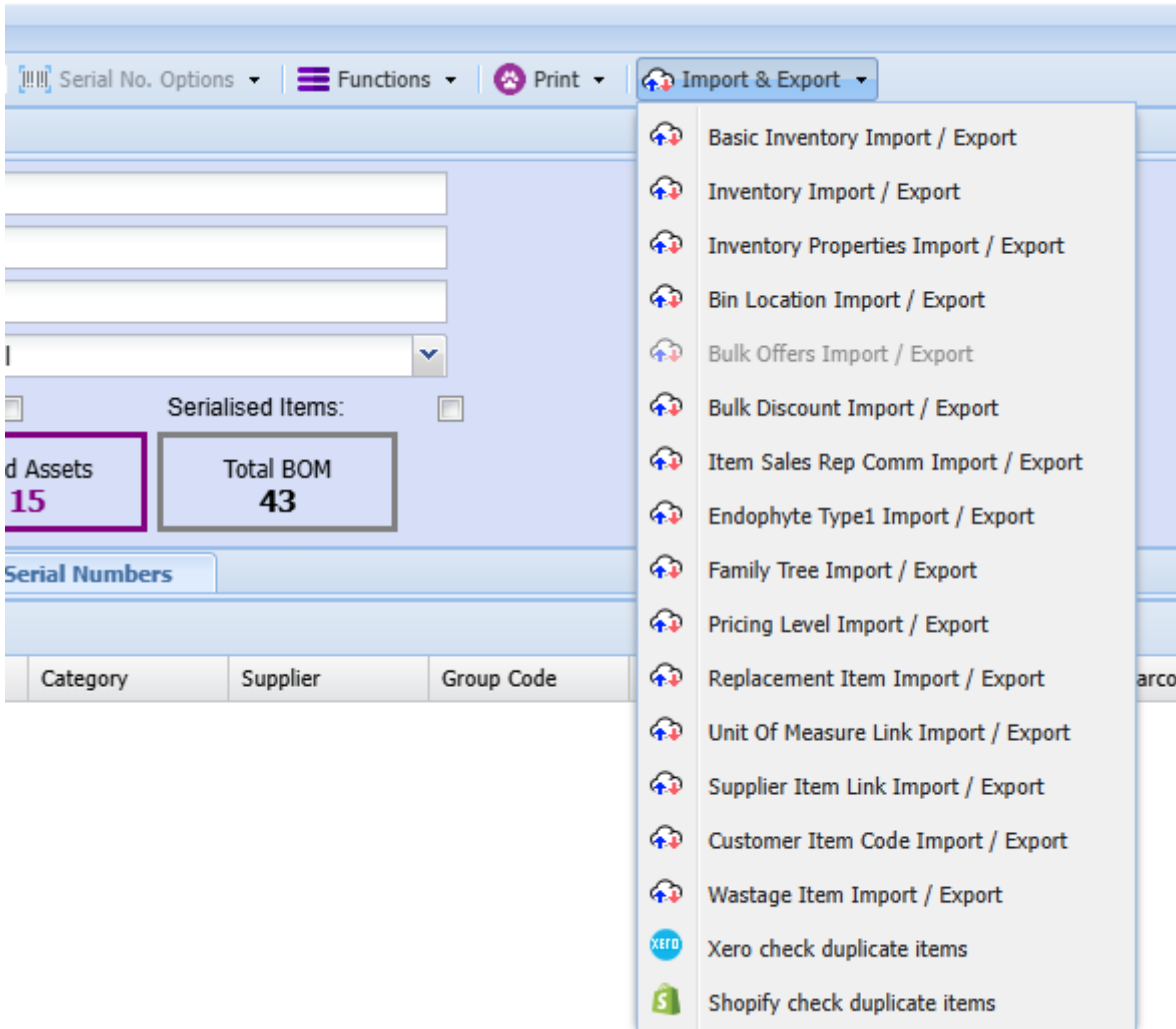


# Inventory Import / Export

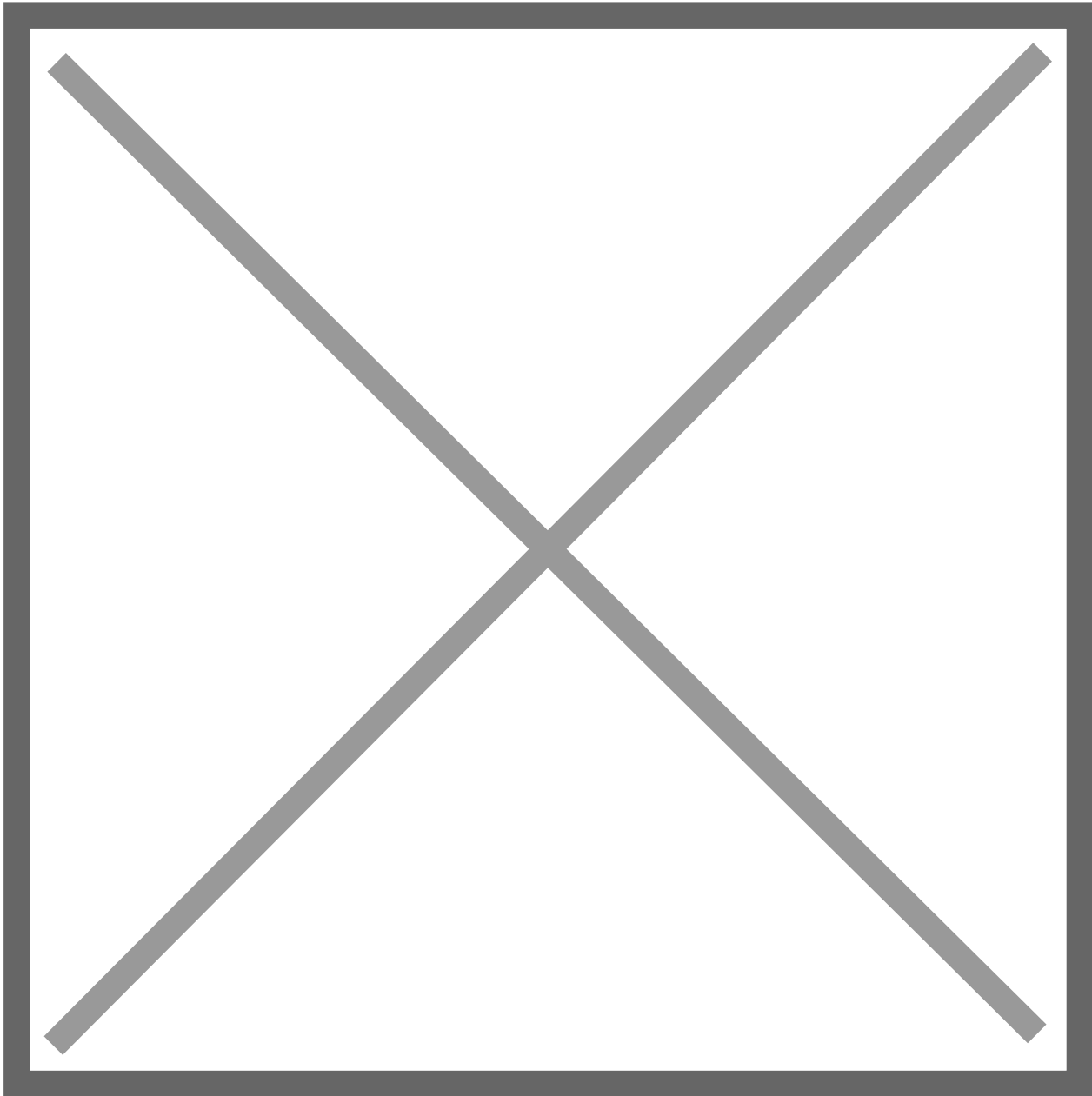
Inventory Module> Configuration> Import& Export Drop Down



## Basic Inventory Import/ Export

Inventory > Configuration> Inventory Setup> Print

Basic Export button: Exports the currently selected Inventory Item into an Excel file.



This function is used to export the basic inventory data out the system

This is a summarized version contains less information than the master inventory export

click print button , and select on the drop down the basic export

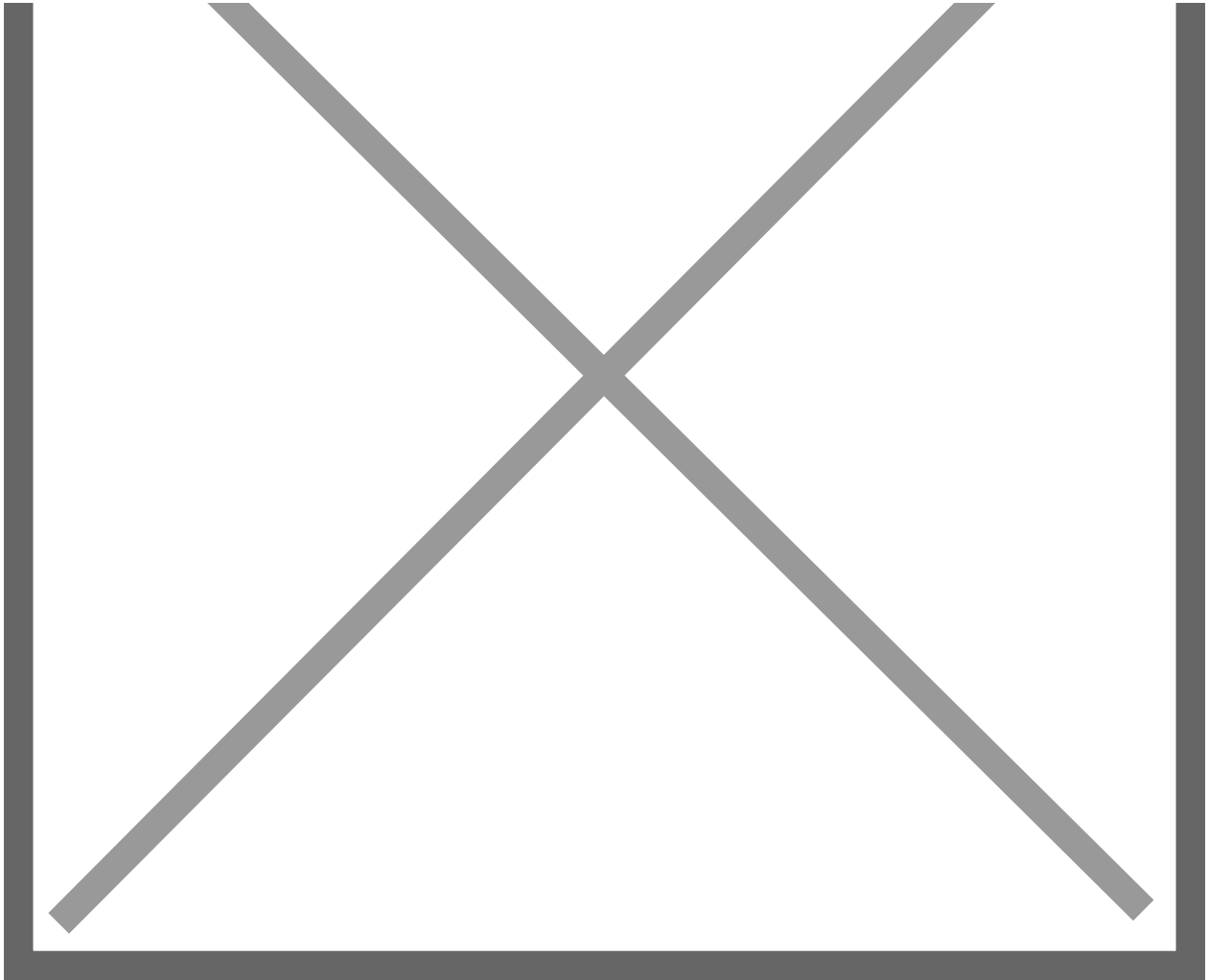
the information will be exported to excel.

---

## Inventory Import/ Export

Inventory > Configuration> Inventory Setup> Print

Master Export button: to export complete list of inventory items to excel spread sheet. Please not that this does not use the search criteria.



This function is used to export the master inventory data out the system.

This is detailed it contains more information than the basic inventory export

click print button and select on the drop down the master export.

the information will be exported to excel.

---

## Inventory Properties Import/ Export

This manual applies to updating the additional properties fields on the inventory item setup

To update the existing data in these fields, you will need to export the item list

To do this, go to **Inventory Module> Configuration> Inventory Setup>**

Enter the filters required (if applicable) and click Search

Once the list of items is returned on screen, click the Import & Export Drop down

And select Inventory Properties Import/ Export option

| # | Att | Memo | Status | Code  | Description        | Qty On Hand | Category | Supplier          | Group Code | Pricing Level | VAT    | Mobile Sync | Expenses Property |
|---|-----|------|--------|-------|--------------------|-------------|----------|-------------------|------------|---------------|--------|-------------|-------------------|
| 1 |     |      |        | 10929 | Asis Automation... |             | Stock    | ASIS Automatio... | 1/AUTO     | Default       | 1 I... | Yes         |                   |
| 2 |     |      |        | 10930 | PCC 485 Conver...  |             | Stock    | ASIS Automatio... | 1/AUTO     | Default       | 1 I... | Yes         |                   |
| 3 |     |      |        | 10931 | Petech Pump A...   |             | Stock    | ASIS Automatio... | 1/AUTO     | Default       | 1 I... | Yes         |                   |
| 4 |     |      |        | 10932 | Cabinet Monitor... |             | Stock    | ASIS Automatio... | 1/AUTO     | Default       | 1 I... | Yes         |                   |
| 5 |     |      |        | 10933 | Power Supply S...  |             | Stock    | ASIS Automatio... | 1/AUTO     | Default       | 1 I... | Yes         |                   |
| 6 |     |      |        | 10934 | Asis Mifare Rea... |             | Stock    | ASIS Automatio... | 1/AUTO     | Default       | 1 I... | Yes         |                   |
| 7 |     |      |        | 10935 | Mifare Card Plain  |             | Stock    | ASIS Automatio... | 1/AUTO     | Default       | 1 I... | Yes         |                   |

Click the export button on the screen that pops up

Inventory Properties Import / Export

Import / Export

Export Data: Export

Import Using ID: ☐

Select & Upload File:

Verify Data File: ☒ Verify

Import Data File:

This will export the list of items in the correct import template

You can now edit the data in the respective columns

**Note:** Do not edit the Stock Code and Description fields

Once you have completed updating the data, save the file as a normal excel file.

Notes on edit data:

Existing data in the field will be overwritten

If you wish to remove existing data in any field, delete the existing data and enter a space in that respective field.

Once the file has been edited and saved, you can now import the file back into the system which will update the items with the changes made.

To import, click the Import & Export drop down

Select Inventory Properties Import/ Export option

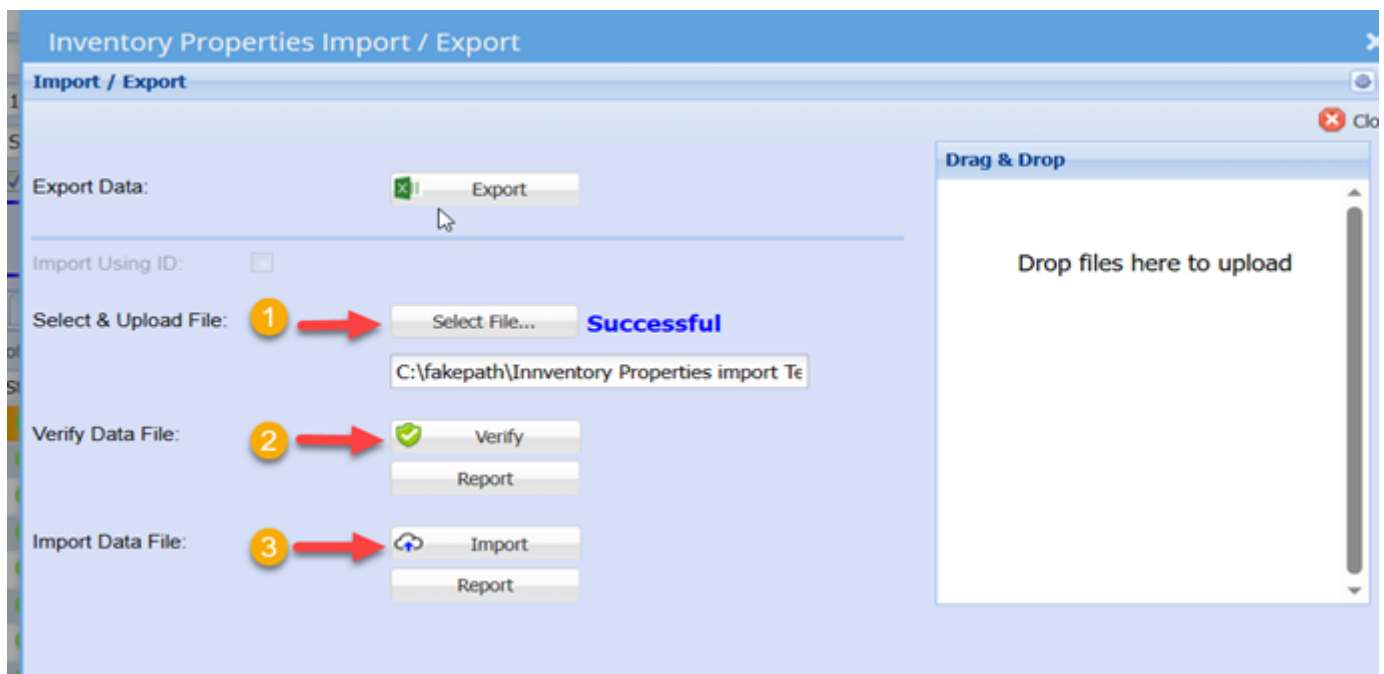
Click on Select File

Search for the file you saved

Click Verify

This is to check for any errors

Click import Button



You should ideally have a successfully result on all functions

If so, click close

You can now check random item on the system to see that the changes have uploaded successfully.

## Bin Location Import/ Export

The function of this window is to bulk import stock item bin locations as well as minimum, maximum, preferred and reorder quantities.

### Inventory> Configuration> Inventory Setup

Click search to return the list of all items

alternatively, enter the required filter and then search to limit the list of items return of a specific range

Click the Import & Export button

Select the Bin Location Import / Export

The screenshot shows the 'Inventory Setup' window. On the left, the 'Configuration' menu has 'Inventory Setup' highlighted. The main area shows search filters and summary statistics. On the right, the 'Import & Export' dropdown menu is open, and 'Bin Location Import / Export' is highlighted with a red box. A red arrow points to the 'Import & Export' button in the top right corner of the window.

Click the Export button

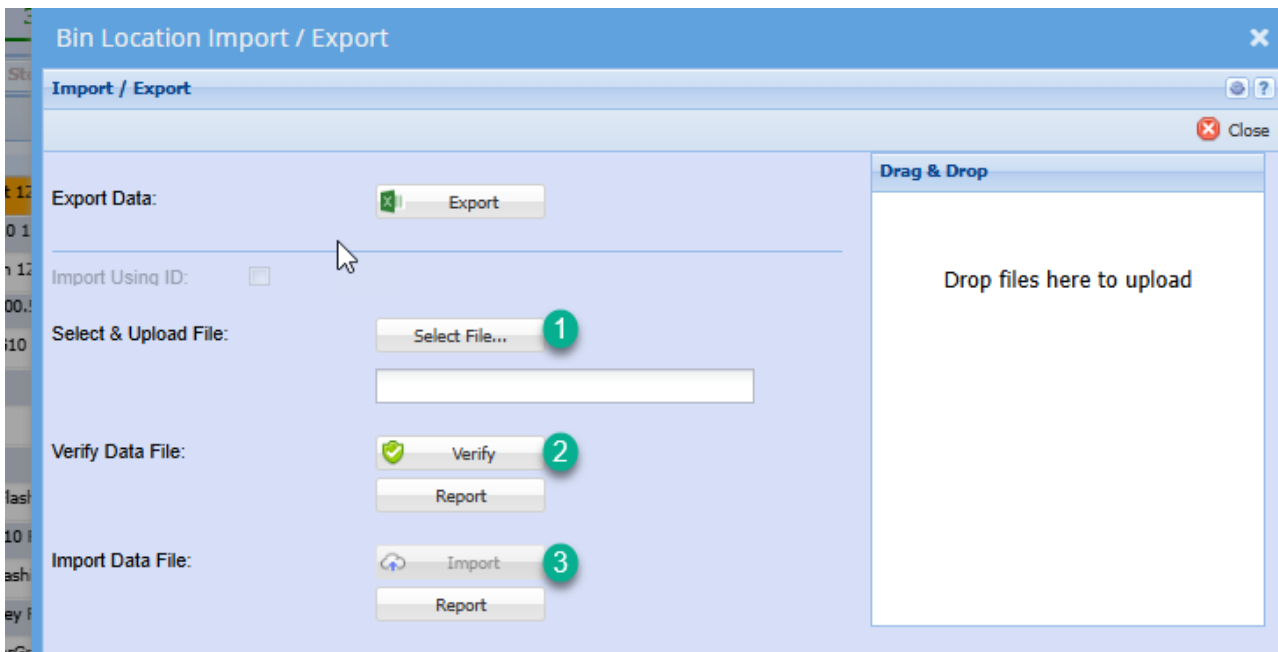
This will export the listed items into excel with the require columns / fields

| A             | B                     | C             | D           | E      | F            | G      | H          |
|---------------|-----------------------|---------------|-------------|--------|--------------|--------|------------|
| StockCode     | ShortDescription      | WarehouseCode | BinLocation | MinQty | PreferredQty | MaxQty | ReorderQty |
| 02-01/3220930 | Bend 80mm Black 90deg | MAST          | AA5         | 0      | 30           | 0      | 20         |
| 02-01/3220930 | Bend 80mm Black 90deg | RECWH         | 456         | 0      | 0            | 0      | 0          |
| 02-01/3220930 | Bend 80mm Black 90deg | RDP           |             | 0      | 0            | 0      | 0          |

Enter the required quantities in the respective columns and save the file

Open the Bin location export / import function again

Select the file you saved



Click Verify button. Should return a successful result

alternatively, click the Report button to view any errors

Click Import Button. Should return successful result

Click Close to exit this window.

You can do random searches on the item setup to ensure all details have uploaded successfully

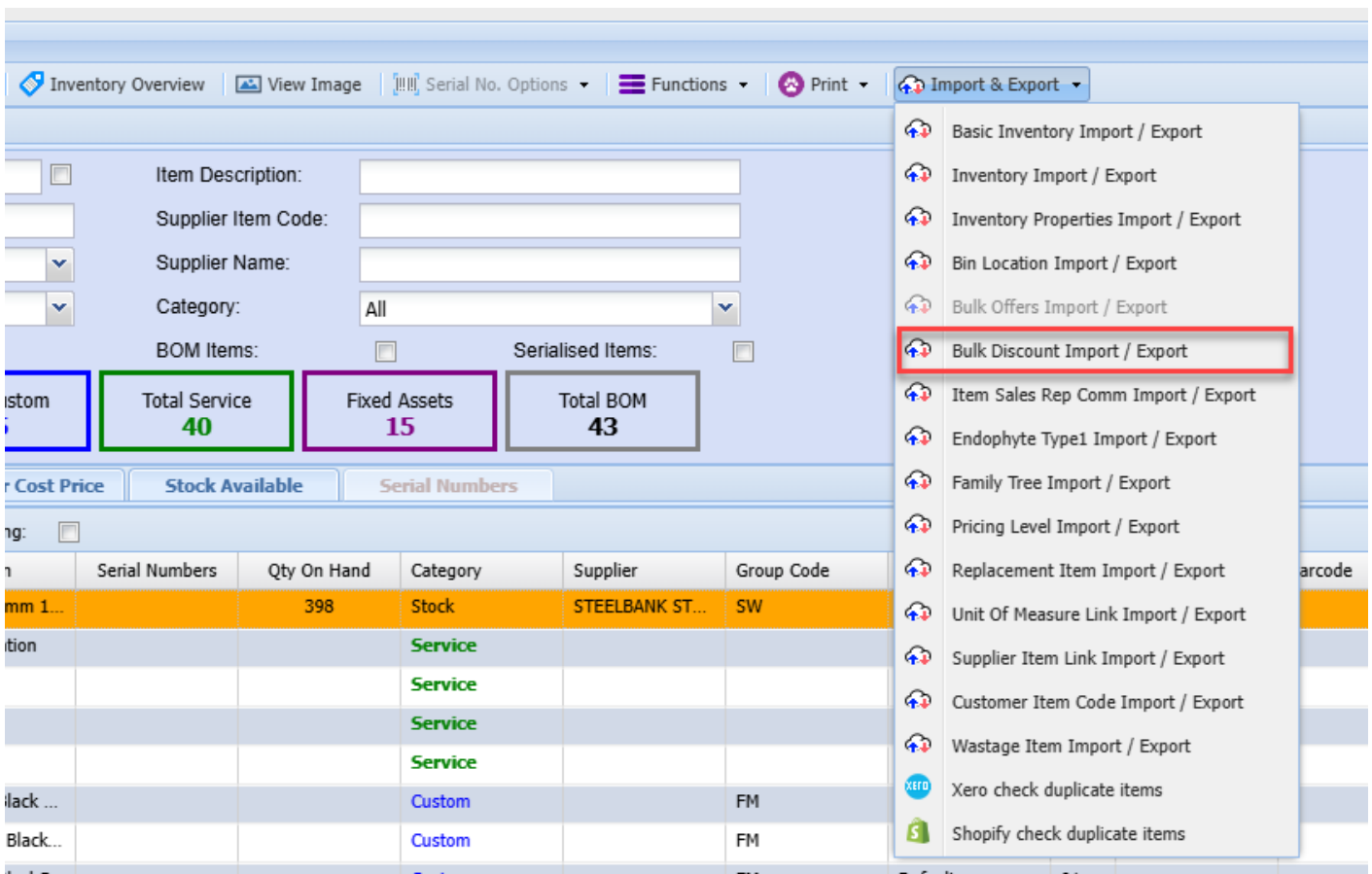
---

## Bulk offers Import/ Export

---

## Bulk Discount Import/ Export

This allows you to import and export bulk Discounts

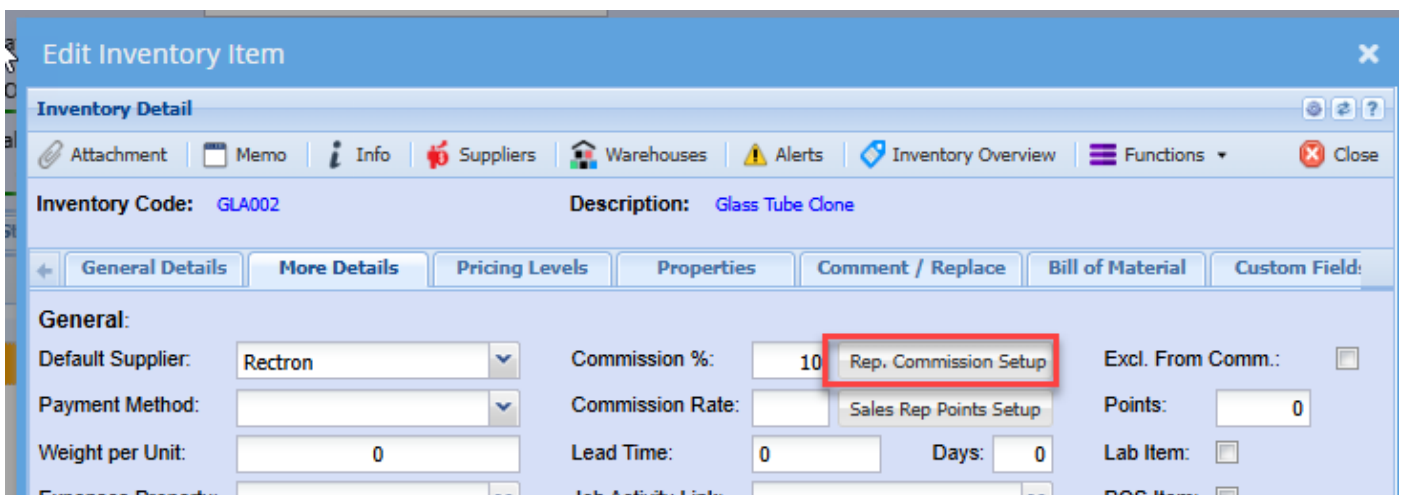


## Item Sales Rep Comm Import/ Export

This function is used to update the sales rep item commission on multiple items

You could have items that may have a different commission structure per sales rep

This function allows you to update these commission structures in a bulk manner without having to edit each item and each rep setup individually



|            |                                                                                                                                  |
|------------|----------------------------------------------------------------------------------------------------------------------------------|
| <b>1</b>   | The heading row can be left in the import file.                                                                                  |
| <b>2</b>   | All values in red are compulsory.                                                                                                |
| <b>3</b>   | The Stock Code must be as it appears in the Inventory Module -> Inventory Setup                                                  |
| <b>4</b>   | The SalesRep column can have either the Sales Reps name or the word Default.                                                     |
| <b>4.1</b> | When the word Default is used the system will update the Commission % on the actual Stock Item with the specified percentage.    |
| <b>4.2</b> | When using the Sales Rep name, the Sales Rep name must be exactly as it appears in the Sales Rep Commission -> Sales Rep Entity. |
| <b>5</b>   | The Active column must be either a 1 or 0 when a Sales Rep name is specified.                                                    |
| <b>5.1</b> | The Active value will be ignored if the Sales Rep column contains the word Default                                               |
| <b>6</b>   | The import file must be saved as a CSV file.                                                                                     |

Below is an example of the template layout for the import file.

| StockCode | Description | SalesRep              | Percentage | Active |
|-----------|-------------|-----------------------|------------|--------|
| PEN001    | Red Pen     | John French / Default | 10         | 1 / 0  |

## Endophyte Type1 Import/ Export

Import the list of Facts at the inventory item setup screen

File to be imported is saved as Excel

[image.png](#)

## Export Facts

Export to see all list of Facts for items

Exports in single line for each Facts per item

If an item has 5 Facts linked to it, the export will export five lines repeating the item code

[image.png](#)

Import is done in two methods:

1. Simple row by row
2. Combination of all the endophytes with the separator

| ItemCode | ItemDescription | Fact Code | Predicted | Fact | Value | Percentage | Comment |
|----------|-----------------|-----------|-----------|------|-------|------------|---------|
| ABC001   |                 | A         | 1/0       | 1/0  | 50    | 40         |         |
| ABC001   |                 | B         |           |      |       |            |         |
| ABC001   |                 | C         |           |      |       |            |         |
| ABC001   |                 | A B C     | 1/0       | 1/0  | 50    | 40         |         |

File must contain the headers.

|                         |                                                                                      |
|-------------------------|--------------------------------------------------------------------------------------|
| <b>Item Code</b>        | Item code of the item                                                                |
| <b>Item Description</b> | Item description (this will not update the item description)                         |
| <b>Endophyte Code</b>   | The code of the Fact<br>Can be entered a single code or multiple code with separator |
| <b>Predicted</b>        | indicated with a 1 for tick on (Yes) or 0 No                                         |
| <b>Fact</b>             | indicated with a 1 for tick on (Yes) or 0 No                                         |
| <b>Value</b>            | Enter a value                                                                        |
| <b>Percentage</b>       | Enter as a value and not as a percentage                                             |
| <b>Comment</b>          | Enter a comment                                                                      |

---

## Family Tree Import/Export

This button allows for a user to import or export the family tree details

Inventory Overview
View Image
Serial No. Options
Functions
Print
Import & Export

Item Description:

Supplier Item Code:

Supplier Name:

Category: All

BOM Items: ☐

Serialised Items: ☐

Custom

Total Service 40

Fixed Assets 15

Total BOM 43

Cost Price

Stock Available

Serial Numbers

ing: ☐

|           | Serial Numbers | Qty On Hand | Category | Supplier        | Group Code |
|-----------|----------------|-------------|----------|-----------------|------------|
| mm 1...   |                | 398         | Stock    | STEELBANK ST... | SW         |
| tion      |                |             | Service  |                 |            |
|           |                |             | Service  |                 |            |
|           |                |             | Service  |                 |            |
|           |                |             | Service  |                 |            |
| black ... |                |             | Custom   |                 | FM         |
| Black...  |                |             | Custom   |                 | FM         |
| blackC    |                |             | Custom   |                 | FM         |

Basic Inventory Import / Export

Inventory Import / Export

Inventory Properties Import / Export

Bin Location Import / Export

Bulk Offers Import / Export

Bulk Discount Import / Export

Item Sales Rep Comm Import / Export

Endophyte Type1 Import / Export

Family Tree Import / Export

Pricing Level Import / Export

Replacement Item Import / Export

Unit Of Measure Link Import / Export

Supplier Item Link Import / Export

Customer Item Code Import / Export

Wastage Item Import / Export

XERO XERO check duplicate items

Shopify check duplicate items

## Pricing Level Import/ Export

Inventory > Configuration> Inventory Setup> Print

This function is used to export the pricing level information out the system

Inventory Overview
View Image
Serial No. Options
Functions
Print
Import & Export

Item Description:

Supplier Item Code:

Supplier Name:

Category: All

BOM Items: ☐

Serialised Items: ☐

Custom

Total Service 40

Fixed Assets 15

Total BOM 43

Cost Price

Stock Available

Serial Numbers

ing: ☐

|           | Serial Numbers | Qty On Hand | Category | Supplier        | Group Code |
|-----------|----------------|-------------|----------|-----------------|------------|
| mm 1...   |                | 398         | Stock    | STEELBANK ST... | SW         |
| tion      |                |             | Service  |                 |            |
|           |                |             | Service  |                 |            |
|           |                |             | Service  |                 |            |
|           |                |             | Service  |                 |            |
| black ... |                |             | Custom   |                 | FM         |
| Black...  |                |             | Custom   |                 | FM         |
| blackC    |                |             | Custom   |                 | FM         |

Basic Inventory Import / Export

Inventory Import / Export

Inventory Properties Import / Export

Bin Location Import / Export

Bulk Offers Import / Export

Bulk Discount Import / Export

Item Sales Rep Comm Import / Export

Endophyte Type1 Import / Export

Family Tree Import / Export

Pricing Level Import / Export

Replacement Item Import / Export

Unit Of Measure Link Import / Export

Supplier Item Link Import / Export

Customer Item Code Import / Export

Wastage Item Import / Export

XERO check duplicate items

Shopify check duplicate items

# Replacement Item Import/ Export

This function is used to import and export the replacement item information out of the system

Inventory Overview
View Image
Serial No. Options
Functions
Print
Import & Export

Item Description:

Supplier Item Code:

Supplier Name:

Category: All

BOM Items:

Serialised Items:

Custom

Total Service 40

Fixed Assets 15

Total BOM 43

Cost Price

Stock Available

Serial Numbers

Serial Numbers

Qty On Hand

Category

Supplier

Group Code

|           |     |         |                 |    |
|-----------|-----|---------|-----------------|----|
| mm 1...   | 398 | Stock   | STEELBANK ST... | SW |
| tion      |     | Service |                 |    |
|           |     | Service |                 |    |
|           |     | Service |                 |    |
|           |     | Service |                 |    |
| Black ... |     | Custom  |                 | FM |
| Black...  |     | Custom  |                 | FM |
| BlackC    |     | Custom  |                 | FM |

Basic Inventory Import / Export
Inventory Import / Export
Inventory Properties Import / Export
Bin Location Import / Export
Bulk Offers Import / Export
Bulk Discount Import / Export
Item Sales Rep Comm Import / Export
Endophyte Type1 Import / Export
Family Tree Import / Export
Pricing Level Import / Export
Replacement Item Import / Export
Unit Of Measure Link Import / Export
Supplier Item Link Import / Export
Customer Item Code Import / Export
Wastage Item Import / Export
Xero check duplicate items
Shopify check duplicate items

## Unit of Measure Link Import/ Export

This function is used to import and export the unit of measure information out of the system

Inventory Overview

View Image

Serial No. Options

Functions

Print

Import & Export

Item Description:

Supplier Item Code:

Supplier Name:

Category: All

BOM Items:

Serialised Items:

Custom

Total Service 40

Fixed Assets 15

Total BOM 43

Cost Price

Stock Available

Serial Numbers

| Serial Numbers | Qty On Hand | Category | Supplier        | Group Code |
|----------------|-------------|----------|-----------------|------------|
| mm 1...        | 398         | Stock    | STEELBANK ST... | SW         |
| tion           |             | Service  |                 |            |
|                |             | Service  |                 |            |
|                |             | Service  |                 |            |
|                |             | Service  |                 |            |
| black ...      |             | Custom   |                 | FM         |
| Black...       |             | Custom   |                 | FM         |
| blackC         |             | Custom   |                 | FM         |

Basic Inventory Import / Export

Inventory Import / Export

Inventory Properties Import / Export

Bin Location Import / Export

Bulk Offers Import / Export

Bulk Discount Import / Export

Item Sales Rep Comm Import / Export

Endophyte Type1 Import / Export

Family Tree Import / Export

Pricing Level Import / Export

Replacement Item Import / Export

Unit Of Measure Link Import / Export

Supplier Item Link Import / Export

Customer Item Code Import / Export

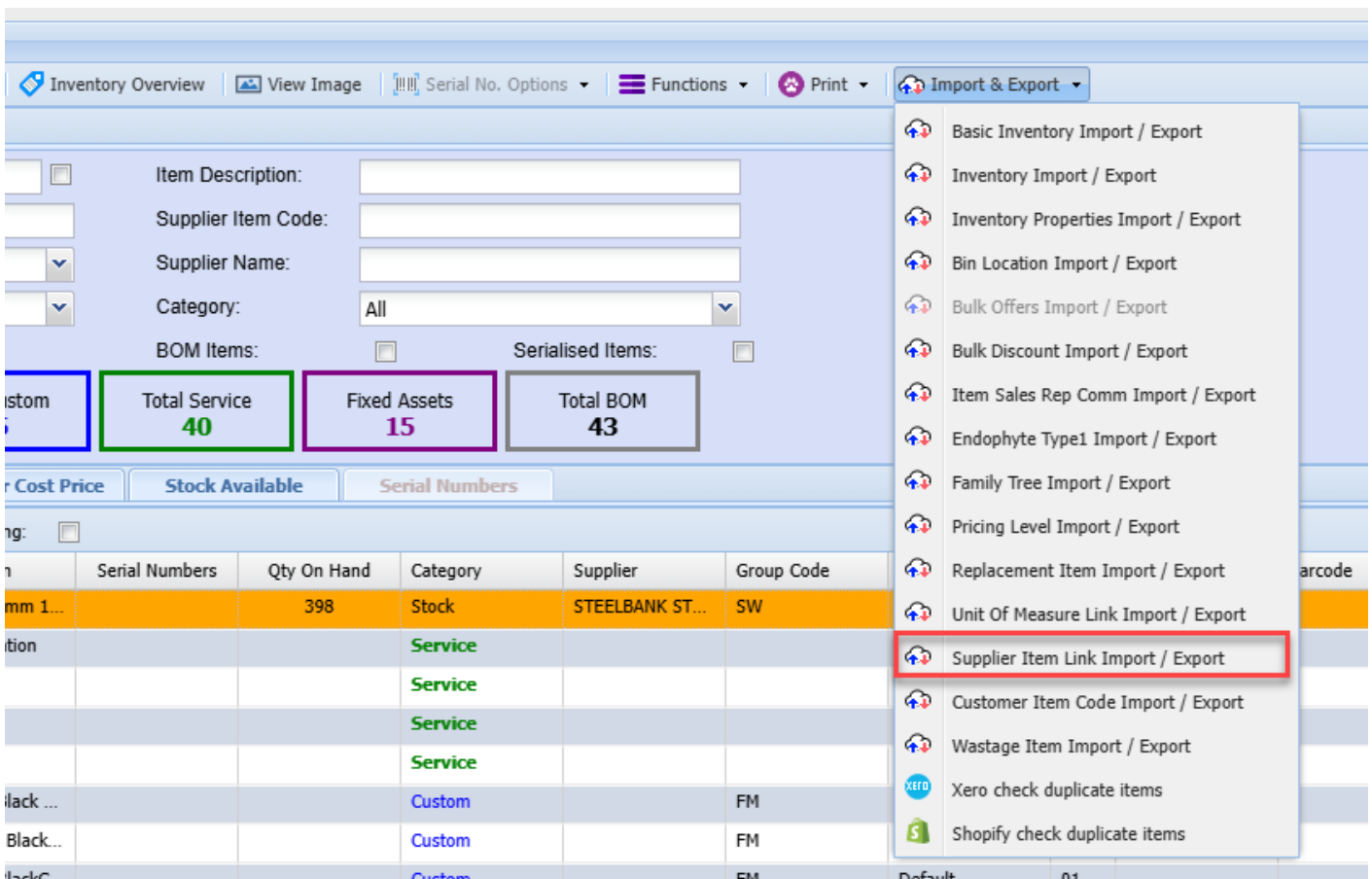
Wastage Item Import / Export

XERO check duplicate items

Shopify check duplicate items

## Supplier Item Link Import/ Export

This function is used to import and export the supplier item link information out of the system



## Customer Item Code Import/ Export

This function is used to import and export the customer item code information out of the system

## Wastage Item Import/ Export

This function is used to import and export the wastage item information out of the system

Inventory Overview
View Image
Serial No. Options
Functions
Print
Import & Export

Item Description:

Supplier Item Code:

Supplier Name:

Category: All

BOM Items: ☐

Serialised Items: ☐

Custom

Total Service 40

Fixed Assets 15

Total BOM 43

Cost Price

Stock Available

Serial Numbers

g: ☐

|           | Serial Numbers | Qty On Hand | Category | Supplier        | Group Code |
|-----------|----------------|-------------|----------|-----------------|------------|
| mm 1...   |                | 398         | Stock    | STEELBANK ST... | SW         |
| tion      |                |             | Service  |                 |            |
|           |                |             | Service  |                 |            |
|           |                |             | Service  |                 |            |
|           |                |             | Service  |                 |            |
| black ... |                |             | Custom   |                 | FM         |
| Black...  |                |             | Custom   |                 | FM         |
| blackC    |                |             | Custom   |                 | FM         |

Basic Inventory Import / Export

Inventory Import / Export

Inventory Properties Import / Export

Bin Location Import / Export

Bulk Offers Import / Export

Bulk Discount Import / Export

Item Sales Rep Comm Import / Export

Endophyte Type1 Import / Export

Family Tree Import / Export

Pricing Level Import / Export

Replacement Item Import / Export

Unit Of Measure Link Import / Export

Supplier Item Link Import / Export

Customer Item Code Import / Export

Wastage Item Import / Export

XERO Xero check duplicate items

Shopify Shopify check duplicate items

## Xero Check duplicate items

This function allows a user to check duplicate items on Xero

This only you have Xero integration

Inventory Overview
View Image
Serial No. Options
Functions
Print
Import & Export

Item Description:

Supplier Item Code:

Supplier Name:

Category: All

BOM Items:

Serialised Items:

Custom

Total Service 40

Fixed Assets 15

Total BOM 43

Cost Price

Stock Available

Serial Numbers

Serial Numbers

Qty On Hand

Category

Supplier

Group Code

|           |     |         |                 |    |
|-----------|-----|---------|-----------------|----|
| mm 1...   | 398 | Stock   | STEELBANK ST... | SW |
| tion      |     | Service |                 |    |
|           |     | Service |                 |    |
|           |     | Service |                 |    |
|           |     | Service |                 |    |
| black ... |     | Custom  |                 | FM |
| Black...  |     | Custom  |                 | FM |
| blackC    |     | Custom  |                 | FM |

Basic Inventory Import / Export

Inventory Import / Export

Inventory Properties Import / Export

Bin Location Import / Export

Bulk Offers Import / Export

Bulk Discount Import / Export

Item Sales Rep Comm Import / Export

Endophyte Type1 Import / Export

Family Tree Import / Export

Pricing Level Import / Export

Replacement Item Import / Export

Unit Of Measure Link Import / Export

Supplier Item Link Import / Export

Customer Item Code Import / Export

Wastage Item Import / Export

XERO Xero check duplicate items

Shopify check duplicate items

# Shopify Check duplicate items

This will enable you to check any duplicated items on Shopify

This will only work if you have an integration with Shopify

Inventory Overview
View Image
Serial No. Options
Functions
Print
Import & Export

Item Description:

Supplier Item Code:

Supplier Name:

Category: All

BOM Items: ☐

Serialised Items: ☐

Custom

Total Service 40

Fixed Assets 15

Total BOM 43

Cost Price

Stock Available

Serial Numbers

g: ☐

|           | Serial Numbers | Qty On Hand | Category | Supplier        | Group Code |
|-----------|----------------|-------------|----------|-----------------|------------|
| mm 1...   |                | 398         | Stock    | STEELBANK ST... | SW         |
| tion      |                |             | Service  |                 |            |
|           |                |             | Service  |                 |            |
|           |                |             | Service  |                 |            |
|           |                |             | Service  |                 |            |
| Black ... |                |             | Custom   |                 | FM         |
| Black...  |                |             | Custom   |                 | FM         |
| BlackC    |                |             | Custom   |                 | FM         |

Basic Inventory Import / Export

Inventory Import / Export

Inventory Properties Import / Export

Bin Location Import / Export

Bulk Offers Import / Export

Bulk Discount Import / Export

Item Sales Rep Comm Import / Export

Endophyte Type1 Import / Export

Family Tree Import / Export

Pricing Level Import / Export

Replacement Item Import / Export

Unit Of Measure Link Import / Export

Supplier Item Link Import / Export

Customer Item Code Import / Export

Wastage Item Import / Export

XERO XERO check duplicate items

Shopify check duplicate items

Revision #12

Created 15 June 2023 09:55:20 by Otsile

Updated 8 January 2025 02:32:57 by Pamela