Import Equipment

Pre-Conditions:

- Use the **Equipment** template with the columns in the table below. The **Name**, **SKU**, **QTY**, **Manufacturer**, **and Model** are required.
- The file should not have duplicate records. If it does, please note that they will be imported separately.
- Check for bad data in the file. Bad Data can cause an unsuccessful import.
- Make sure to delete the column names before you import them into Industrack. Otherwise, it will cause issues during the import.

EQUIPMENT IMPORT TEMPLATE

Note that columns with (asterisk) * are required.

Name*	sku*	Sale Description	Sale Price	Cost	QTY*	Manufacturer*	Model*	Vendor	Purchasing Description
Heat Pumps	178842	ine. The XR14 electric he	2544.5	1805.99	68	LG	4TWR4018G1000	Industrack	on to 5-ton heat pumps. The XR15

How to Import Equipment

1. Go to Settings > Integrations > Import List > ACTIONS > Import Equipment.

indusTrack MAP	CUSTOMER	ESTIMATES SCHEDU	E INVOICES	TIMESHEET	SNOWTRACK	MESSAGES	REPORTS		••••
L Inventory	•								ACTIONS +
PriceBooks	۰ 🕻	Created Date			IMPORT	ТҮРЕ		STATUS	
Scheduling	۵ C	Jan 31, 2022, 9:51:18 AM			Service I	ocation		Complete	1
O Timesheet	۰ C	Jan 31, 2022, 9:48:25 AM			Address	Book		Complete	1
E Client	<	Jan 7, 2022, 8:56:50 AM			Priceboo	ok		Complete	1
$\mathcal B$ Integrations	~ 4	Jan 7, 2022, 8:47:30 AM			Priceboo	ok		Complete	1
QuickBooks Stripe		Jan 6, 2022, 6:00:49 PM			Priceboo	ok		Canceled	I
Ring Central		Jan 6, 2022, 5:55:50 PM			Priceboo	ok		Complete	1
🛎 Email	C	Jan 6, 2022, 5:53:19 PM			Priceboo	ok		Complete	1
Import list	-	Jan 6, 2022, 5:52:22 PM			Priceboo	ak		Complete	1

On the Import List Page click on Actions, and on the drop-down select Import Equipment.

IndusTrack MAP	CUSTOME	R ESTIMATES SCHEDULE INVOICES	TIMESHEET SNOWTRACK MESSAGES REPORTS		🔤 O 🌼
M Inventory	<				
PriceBooks	<	Created Date	IMPORT TYPE	STATUS	+ Import Address Books
Scheduling	¢	Jan 31, 2022, 9:51:18 AM	Service Location	Complete	+ Import Service Locations
O Timesheet	¢	Jan 31, 2022, 9:48:25 AM	Address Book	Complete	+ Import Jobs + Import Job Tasks
Client	<	Jan 7, 2022, 8:56:50 AM	Pricebook	Complete	+ Import involces
𝔅 Integrations	٣	Jan 7, 2022, 8:47:30 AM	Pricebook	Complete	+ Import AddressBook Equipments
QuickBooks					+ Import Services
Stripe		Jan 6, 2022, 6:00:49 PM	Pricebook	Canceled	+ Import Non-inventory Part
2 Ring Central		Jan 6, 2022, 5:55:50 PM	Pricebook	Complete	Import Inventory Part Import Equipment
🛎 Email		Jan 6, 2022, 5:53:19 PM	Pricebook	Complete	+ Import Pricebook
Import list		Jan 6, 2022, 5:52:22 PM	Pricebook	Complete	+ Import AddressBook Notes

2. An Import Equipment window will pop up. Select your Timezone, Click Upload and select the correct Excel file to be imported.

Import Equipment Parts		Х
Timezone *	Timezone *	•
Select a File to upload		1 UPLOAD
		CANCEL SAVE

3. Map the corresponding column names in the file then click Save.

Import Equipmen	nt Parts								Х
Select a File to uploa	d							1 UPL	.OAD
Name	▼ SKU	▼ Sale Description ▼	Sale Price	•	Cost	▼ QTY	.	Manufacturer	•
Heat Pumps	178842	Features Get affordable heating and cooling with the durability you expect from Trane. The XR14 electric heat pump offers up to a 14 SEER rating on a matched air handler or furnace system.	2544.5		1805.99	68		LG	Þ
								CANCEL	SAVE

4. After the file has been uploaded, the status should be **COMPLETE**. To verify if the upload is successful, **click on the 3 dots beside status and click details.**

Note that if the Data has thousands of records, it may take a while for the status to change to COMPLETE.

			ACTIONS 🔻
Created Date	IMPORT TYPE	STATUS	
Feb 8, 2022, 12:08:25 PM	Equipment Part	Complete	
		Items per page: 15 💌 1 - 1 of 1	Detail C ancel

5. By clicking on **details**, if all rows were successfully imported you should be able to see it here. The number of **All Rows** and the **number of successful** rows should match.

Import detail info	0	Х
All Rows	Number Of Successful	Number Of Errors
3	3	0
		CANCEL

6. If all Rows were successfully imported, do a spot check in Settings> Inventory> Equipment and verify the information imported is ACCURATE.

7. If unsuccessful, rows with the error will not be uploaded and the number of successful rows will not be the same as the total number of rows in the file. This is what happens if you import files with Bad Data.

All Rows	Number Of Successful	Number Of Errors	
350	0	0	
Lines with errors:			
			EXPORT TO EXC
Line Number 🖕	Content		
T T T	T	Error	
90	["1416","809253","Condenser Fan Rain Protector","","Assembly","T610046","To protect a new fan motor from the elements a rain protector is recommended. The protector keeps rain and snow from getting into the inner working of the motor, extending the life of the motor. Should be quoted on all outdoor motors exposed to the weather","191","191","1"]	Error Nullable object must have a value.	Ŧ

8. You will be able to see the line number in your file where the error is located and the line's content. The detail of the error is also explained in the error tab.

9. You can export the error detail to excel and determine what is causing the error.

10. After the error is determined, edit your Service location File remove bad data then reimport back again.