

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.

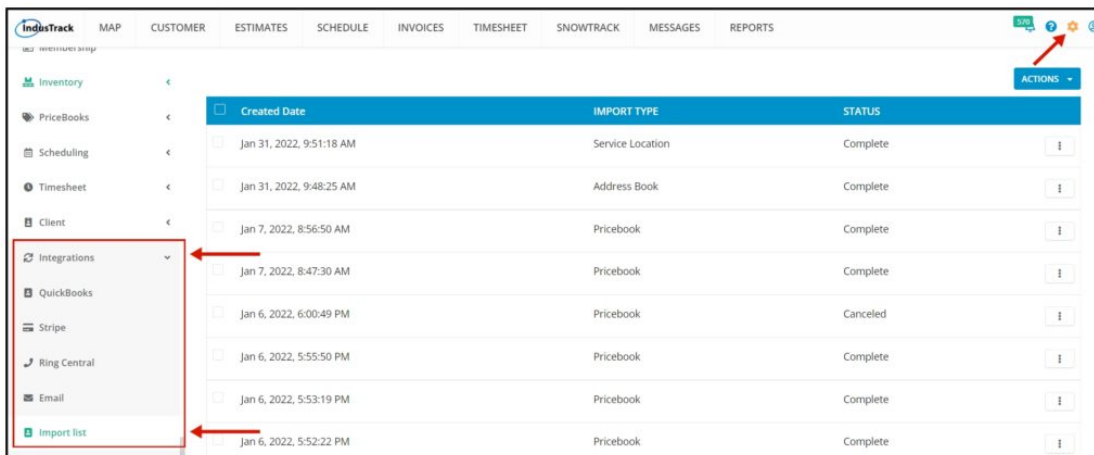
EQUIPMENT IMPORT TEMPLATE

Note that columns with (asterisk) * are required.

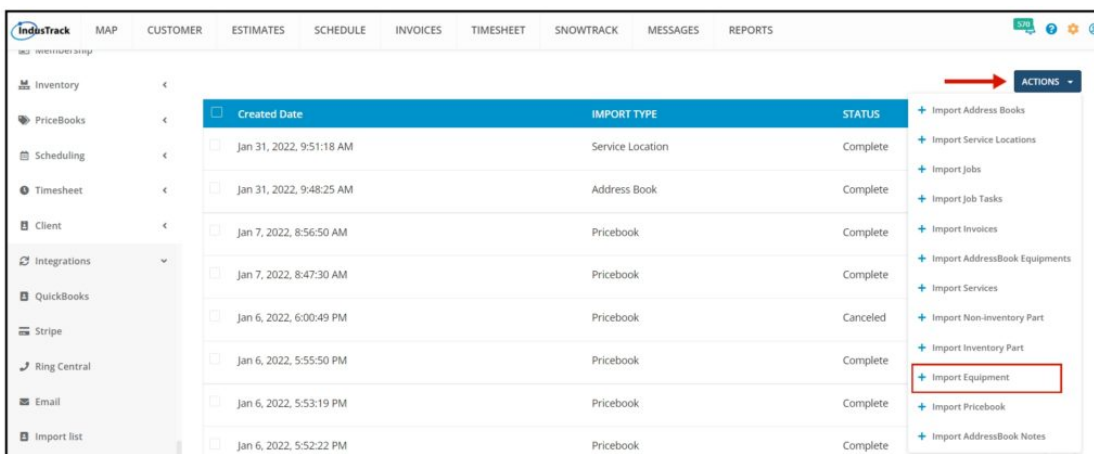
Name*	SKU*	Sale Description	Sale Price	Cost	QTY*	Manufacturer*	Model*	Vendor	Purchasing Description
Heat Pumps	178842	Line. The XR14 electric he	2544.5	1805.99	68	LG	4TWR4018G1000	Industrack	on to 5-ton heat pumps. The XR15

How to Import Equipment

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



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



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

Timezone *

Timezone *

Select a File to upload

UPLOAD

CANCEL

SAVE

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

Import Equipment Parts

Select a File to upload

UPLOAD

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

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.

Created Date

Feb 8, 2022, 12:08:25 PM

IMPORT TYPE

Equipment Part

STATUS

Complete

Items per page: 15

1 - 1 of 1

Detail

Cancel

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 X

All Rows	Number Of Successful	Number Of Errors
3	3	0

CANCEL SAVE

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.

Import detail info X

All Rows	Number Of Successful	Number Of Errors
350	0	0

Lines with errors:

Line Number	Content	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"]	Nullable object must have a value.
	["1625","809256","Tune-Up & Pro Clean w/Topoff if No Leaks*","","Assembly","T610037","A proper tune-up requires that the refrigerant levels be checked to ensure that the system provides proper	

EXPORT TO EXCEL

CANCEL SAVE

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.