

Import Inventory Part

Pre-Conditions:

- Use the **Inventory** template with the columns in the table below. The Name and Quantity 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.

INVENTORY PART IMPORT TEMPLATE

Note that columns with (asterisk) * are required.

| Name* | SKU | Sales description | Sale Price | Cost | QTY* | Vendor | Purchasing Description | Reorder point |
|---------------|----------|-------------------|------------|-------|------|------------|------------------------|---------------|
| Cabinet Pulls | 11745236 | A Cabinet ha | 29.99 | 20.75 | 425 | Industrack | Cabinet Pulls | 50 |

How to Import Inventory Part

1. Go to Settings > Integrations > Import List > ACTIONS > **Import Inventory Part**.

The screenshot shows the Industrack web application interface. The top navigation bar includes 'MAP', 'CUSTOMER', 'ESTIMATES', 'SCHEDULE', 'INVOICES', 'TIMESHEET', 'SNOWTRACK', 'MESSAGES', and 'REPORTS'. On the left, a sidebar menu is expanded to 'Integrations', with 'Import list' highlighted. The main content area displays a table with columns for 'Created Date', 'IMPORT TYPE', and 'STATUS'. The 'ACTIONS' dropdown menu is open in the top right corner, showing various import options.

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

This screenshot shows the 'ACTIONS' dropdown menu from the previous screenshot. The 'Import Inventory Part' option is highlighted with a red box. Other options in the menu include 'Import Address Books', 'Import Service Locations', 'Import Jobs', 'Import Job Tasks', 'Import Invoices', 'Import AddressBook Equipments', 'Import Services', 'Import Non-inventory Part', 'Import Equipment', 'Import Pricebook', and 'Import AddressBook Notes'.

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

Import Inventory Parts

Timezone * ←

Select a File to upload

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

Import Inventory Parts

Select a File to upload

| Name | SKU | Sale Description | Sale Price | Cost | QTY |
|-------|-----|-------------------|------------|------|-----------|
| NAME* | SKU | SALES DESCRIPTION | SALE PRICE | COST | QUANTITY* |

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 into COMPLETE.

| Created Date | IMPORT TYPE | STATUS |
|---|--------------------|----------|
| <input type="checkbox"/> Feb 8, 2022, 10:49:33 AM | Inventory Part | Complete |
| <input type="checkbox"/> Feb 8, 2022, 10:12:30 AM | Non-Inventory Part | Complete |

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 |

6. If all Rows were successfully imported, do a spot check in the Settings> Inventory> Inventory list 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 | |

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.