

Import Non-Inventory Part

Pre-Conditions:

- Use the **Non-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.

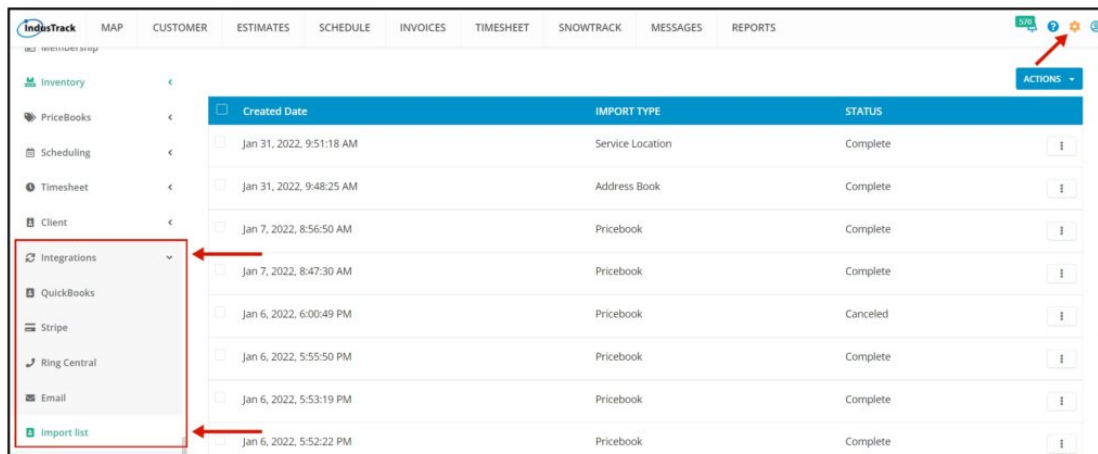
NON-INVENTORY PART IMPORT TEMPLATE

Note that columns with (asterisk) * are required.

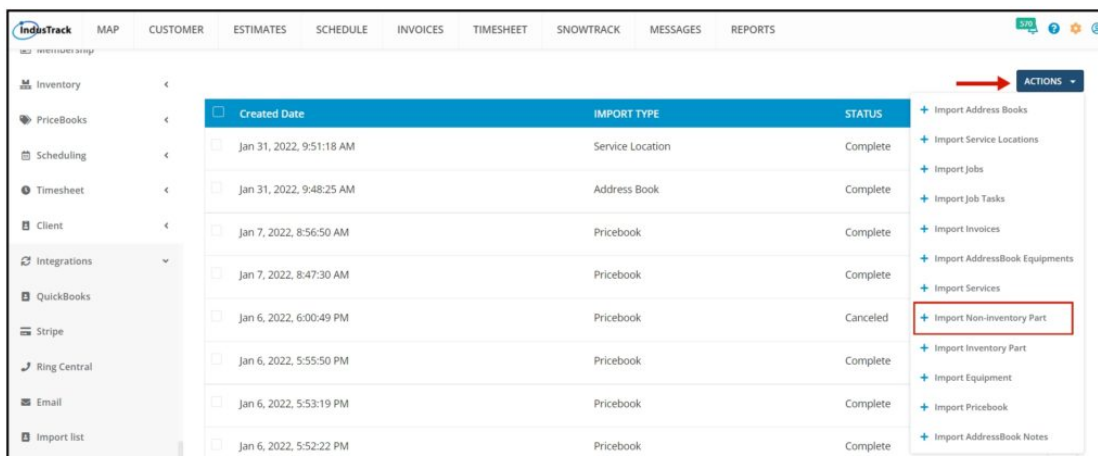
| Name* | SKU | Sales description | Sale Price | Cost | QTY* | Vendor |
|------------------------------|--------|-------------------|------------|--------|------|------------|
| Fluorescent Ceiling Lighting | 117430 | A fluorescent | 159.87 | 130.99 | 1065 | Industrack |

How to Import Non-Inventory Part

1. Go to Settings > Integrations > Import List > ACTIONS > **Import Non-inventory Part**.



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



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

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

| NAME* | SKU | SALES DESCRIPTION | SALES 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 | ACTIONS |
|--------------------------|--------------------|----------|---------|
| Feb 8, 2022, 10:12:30 AM | Non-Inventory Part | Complete | Detail |
| Feb 7, 2022, 9:36:05 AM | Service | Complete | 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.

| 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.

The screenshot shows a window titled "Import detail info" with a close button (X) in the top right corner. It contains two tables. The first table is a summary table with three columns: "All Rows", "Number Of Successful", and "Number Of Errors". The second table is a detailed error table with three columns: "Line Number", "Content", and "Error". The error table has an "EXPORT TO EXCEL" button in the top right corner. At the bottom right of the window are "CANCEL" and "SAVE" buttons.

| 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.