

# Importing Inventory

## Customer Orders

- EZ Orders
- Load
- Create From Stock Status
- Create From Usage
- Create From Requests
- Create For Restock
- Bill Of Lading Print
- Edit
- Restore
- Inquiry
- Reports
- Line Audit Report
- Quoting
- Shipper Edit/Inquiry
- Requests
- Shipper Reports
- Shipper Item Label Print
- Acknowledgements
- Receiving
- Receiving (CO)
- Receipt Report

## Billing

- Load Invoice
- Invoice Edit
- Invoice Inquiry
- Invoice Reports
- Billable Trans. Reports

## Inventory

- Load
- Edit
- Copy
- Tool Notice Report
- Inquiry
- Stock Status Reports
- Historical Reports
- Adjustments
- Kanban

## Asset Management

- Work Orders
- Bill Of Materials
- Master Kits
- Machine Inventory
- Repair

## Transactions

- Load Disbursements
- Inventory Count With Usage
- Inventory Count With Adjust
- Inventory Count
- Edit
- Edit Receipts
- Edit Usage
- Review And Stamp Usage
- Usage Requests
- Inventory Transfers
- Location Transfers

## Miscellaneous

- Supplier Catalog
- Customer Catalog
- Mfg Catalog
- Manage Saved Reports
- Edit Login
- Administrative Functions
- Customer Inquiry

## Purchasing

- Edit
- Inquiry
- Receiving
- Receipt Review
- Acknowledgement
- Returns
- Reports
- Receipt Report
- Sources Menu
- Buyer Load
- Buyer Edit
- Rfq Menu

## [Imports & Exports](#)



Click on Imports & Exports

# Importing Inventory

## Imports & Exports

### Imports - Transactions

- Usage
- Inventory Count
- Inventory Count With Usage
- Inventory Boh Adjust
- Inventory Count With Adjust
- Inventory Item Type
- Inventory Repair
- Inventory Mdq Adjust
- Customer Requests (Catalog)
- Orders
- Order Shippers
- Order Receipts
- Order Acknowledgements
- PO Acknowledgements
- PO Receipts
- Work Orders
- Supplier Invoice

### Imports - Master Records

- Branch Inventory
- Supplier Catalog
- Manufacturers
- Manufacturer Catalog
- Cabinet Items
- Customer Catalog
- Purchase Sources
- Purchase Source Catalog
- Customer Requestors
- Customer Accounts
- Customer Departments
- Full Inventory import
- Customer Contracts
- [Full Remote Inventory](#)
- Kanban Items
- Machines
- Machine Inventory

### Exports

- Customer Order
- Customer Order Receipts
- Shipper
- Purchase Order
- Purchase Order Receipt
- PO Receipt Reviews
- Usage
- Supplier Invoices
- Customer Quotes
- Unstamp Exports

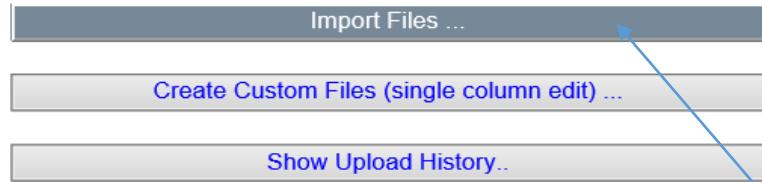
### Administration

- List Of Files
- Data Collection Forms
- Xml Administration
- Edi Administration
- Import Performance

Click on Full Remote Inventory



# Importing Inventory



Click on Import Files

# Importing Inventory

**IMPORT: Upload Full Remote Inventory File...**

Maximum file size of 128MB. Break up larger files into seperate uploads.

Select File:  Browse...

Import Mode:

- ADD AND CHANGE
- ADD ONLY
- CHANGE ONLY
- TEST ONLY
- DELETE ONLY

Upload & Process

System will add the prefix **FULLINV\_login\_yyyymmddhhmm\_** to the file name.

Available Columns & Formats

Select the import mode

1. Add & Change modifies existing records and adds missing records.
2. Add only will add the new items skipping items already on file.
3. Change only will edit existing records skipping new items.
4. Test Only will test the contents of your file without changing records
5. Delete only will remove any items selected.

# Importing Inventory

Maximum file size of 128MB. Break up larger files into separate uploads.

Select File:

Import Mode: **ADD AND CHANGE** ▼

**Upload & Process**

System will add the prefix **FULLINV\_login\_yyyyymmddhhmm\_** to the file name.

Available Columns & Formats			
<b>IMMID</b>	A code that identifies the Indirect Material Manager in charge of this item (not needed if IMMID = SupplierID)	Text [50]	▲ ▼ ✕ ☑
<b>CustID</b>	A code that identifies the customer using this item	Text [50]	▲ ▼ ✕ ☑
<b>Facility</b>	A code that describes the facility or plant the item exists in	Text [50]	▲ ▼ ✕ ☑
<b>Location</b>	A code to identify the location or crib within the facility where the item exists	Text [50]	▲ ▼ ✕ ☑
<b>IPN</b>	The part number that identifies the product	Text [100]	▲ ▼ ✕ ☑
<b>StockLocation</b>	Identifies a secondary area within a location to maintain BOH	Text [50]	▲ ▼ ✕ ☑
<b>BOH</b>	Balance on hand for the customer at the prescribed facility and location	Decimal	▲ ▼ ✕ ☑
<b>DateLoaded</b>	User-controlled date item began to be managed	Date	▲ ▼ ✕ ☑
<b>SupplierItemID</b>	The suppliers part number identifying the item	Text [100]	▲ ▼ ✕ ☑
<b>CustItemID</b>	The customers part number for this item	Text [100]	▲ ▼ ✕ ☑
<b>MfgID</b>	Manufacturer for this item	Text [50]	▲ ▼ ✕ ☑
<b>MfgItemID</b>	Manufacturer's item number for this item	Text [100]	▲ ▼ ✕ ☑

▲ Move column up. ▼ Move column down. ✕ Remove column. ☑ Remove all from here.

Header defaults to old format if not included. Use Default ▼

◀ Reset Format   Create Header ▼

---

Guidelines

File must be tab-delimited text, each line ending in a carriage return & line feed. (Blank lines are ignored, and not included in the row count.)

The first line must be a header containing the appropriate columns. Any columns that do not match the ones listed here will reject the file. If you wish to ignore a column, either delete the column for the entire file or leave the header column blank. You may use the up, down & delete buttons in the column list to create a header to add to your file.

Columns can be placed in any order, and are optional unless mandatory for new items.

Red bordered fields in yellow are always needed.

Green fields for transactions, or for new master record items, default to current date or time for date fields, zero for quantity fields, or assigned by system (such as line numbers).

Underlined fields are remote inventory identifiers.

Gray shaded fields are ignored for existing items.

A calculator  in a field indicates that the values are calculated by the system, either at transaction time, or on a scheduled basis.

Scroll up and down to see all available data columns to use. The columns in yellow are always required when loading and editing data. IMMID is not required. All other columns are selected if needed. Use these column names to create a excel spreadsheet.

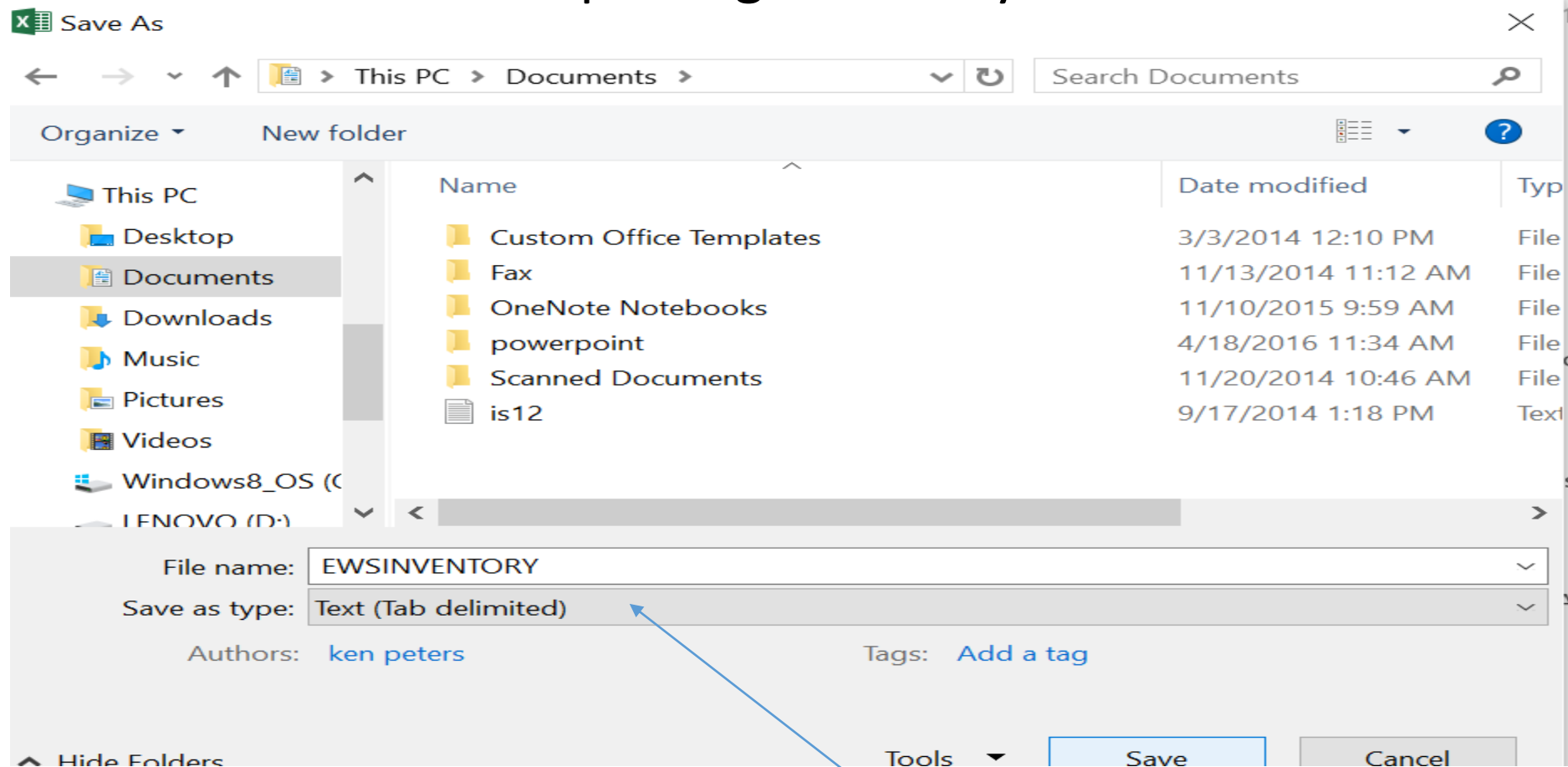
# Importing Inventory

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P
1	CustID	Facility	Location	IPN	StockLocation	BOH	SupplierItemID	CustItemID	MfgID	MfgItemID	PrimaryBin	UOM	MinQty	MaxQty	SellPrice	ItemType
2	TEST1	0001	XFERMI	10001		10	ABCD1	10001	ACME, INC.	5678	A102	EA	5	10	23.34	M
3	TEST1	0001	XFERMI	10002		10	ABCD2	10002	ACME, INC.	5679	A102	EA	5	10	30.99	M
4	TEST1	0001	XFERMI	10003		10	ABCD3	10003	ACME, INC.	5672	A102	EA	5	10	23.34	M
5	TEST1	0001	XFERMI	10004		10	ABCD4	10004	ACME, INC.	5673	A102	EA	5	10	4.99	M
6	TEST1	0001	XFERMI	10005		10	ABCD5	10005	ACME, INC.	5674	A102	EA	5	10	23.34	M
7	TEST1	0001	XFERMI	10006		10	ABCD6	10006	ACME, INC.	5675	A102	EA	5	10	8.5	M
8	TEST1	0001	XFERMI	10007		10	ABCD7	10007	ACME, INC.	5676	A102	EA	5	10	23.99	M
9																

This is an example of a excel spreadsheet. All column names must match. CustID, Facility, Location are from the locations you setup. SupplierItemID is the EWS part #.

StockLocation should be blank but is required. Item type M is managed, C is consigned.

# Importing Inventory



Save the file as a tab delimited text file and save the file on your network named as you like.

# Importing Inventory

Maximum file size of 128MB. Break up larger files into separate uploads.

Select File:

Import Mode: **ADD AND CHANGE** ▼

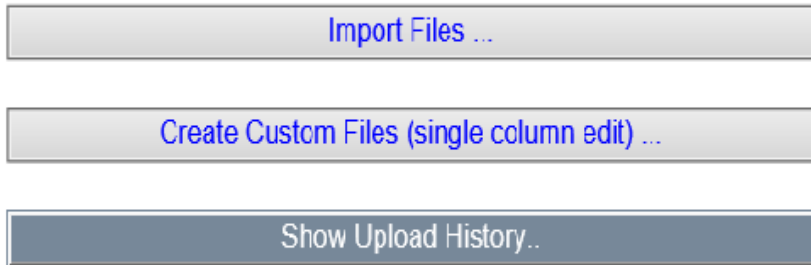
System will add the prefix **FULLINV\_login\_yyyymmddhhmm\_** to the file name.

**File processed, ADD AND CHANGE mode: (7 rows imported, 7 good, 0 bad.)**

Browse and find your file and click Upload & Process  
You will be notified of success or failure of the upload



# Importing Inventory



To check for errors on the file click on Show Upload History

# Importing Inventory

[Refresh Display](#)

	FileName	ImportMode	Imported	FileSize	TotalCt	GoodCt	BadCt	Status	Message	LogFile
1	<a href="#">FULLINV_ews_0719113203-14_EWSINVENTORY.txt</a>	ADD AND CHANGE	Jul 19 2016 11:32AM	697	7	7	0	PROCESSED		<a href="#">FULLINV_ews_0719113203-14_EWSINVENTORY.txt.log</a>

Click on corresponding file to list errors and issues

# Importing Inventory

<b>Customer</b> TEST1		<b>EMPIRE TEST</b>	
<b>Product Info</b> IPN: 10001		<b>Inventory Info</b> Location: XFERMI Facility: 0001	
Cust. Part	10001	Primary Bin	A102
Supp. Part	ABCD1	WareHouse	
Description		Operation	
Mfg	ACME, INC.	Station	
Mfg Part	5678	Lot	
Prod Class		BOH	10
Repairable	<input type="checkbox"/>	Mach BOH	(none)
Warrantable	<input type="checkbox"/>	Lot Tracking	N
Durable	<input checked="" type="checkbox"/>	UOM	EA
Internal Notes		Active	
		MDQ	
		OOQ	0
		ORQ	0
		L. Disb	
		L. Rcvd	
		L. Count	
		L. Order	
		Created	7/19/2016
		Loaded	7/19/2016
		Item Type	M
		Bin Notes	
<b>Miscellaneous</b>			
		<b>Financial Info</b>	
		Unit Sell	23.34
		Avg	
		Dept	
		Acct	
		Price Date	
		Base Price	
		Pass Thru	
		<b>Supplier Info</b>	
		Net Cost	0.00
		Avg Cost	
		Last Rcpt Cost	
		Sell Mult	
		Source	
		Src. Part	
		Buy Qty	
		Unit	
Usage   Usage Summary   Usage Requests   Open POs   Closed POs   Receipts   Open Orders   Closed Orders   Open Shippers   Order Requests   Sales   Inv Counts   BOH Adjusts   MDQ Adjusts   Transfers   Maint. Changes   All Locs   Asset Mgmt   Machines   Avail. Lots   BOMs			
Query by: <input checked="" type="radio"/> IPN <input type="radio"/> SupplierItemID <input type="radio"/> CustItemID			

This is an example of a inventory record from the import in inventory inquiry