TRANSFERRING BULK INVENTORY – EXPORT & IMPORT

Sometimes it is necessary to move all of the inventory from one van to a different van:

1. Purchase of a replacement van
2. Van is in an accident
3. Switching vans between technicians

In these instances, using the export/import functions in Materials > Locations is the most efficient way to move a large amount of inventory from one van to another.

*This is **NOT** the method to use for initial Truck Stock purchase to stock a new van. A purchase order should be created for Initial truck stock purchase*

EXPORT INVENTORY LOCATION

1. Go to the inventory location containing the inventory that needs to be moved.
2. Uncheck the Include 0 Quantity checkbox.
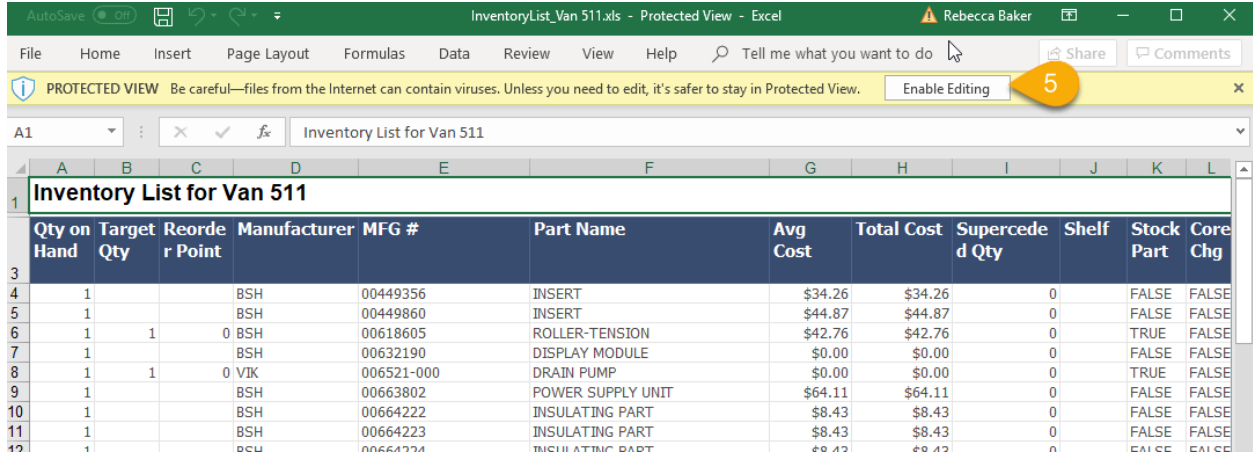3. Click on the Export to Excel button.

4. The file will open in the lower left-hand corner of the browser. Click on the file to open it.

5. Click on "Enable Editing" in the yellow bar in the Excel file.

6. Highlight the top 2 rows (be sure to include the tiny row that can barely be seen). Right click and delete the top 2 rows. The top row should now be the column headers (Qty on Hand, Target Qty, etc.)
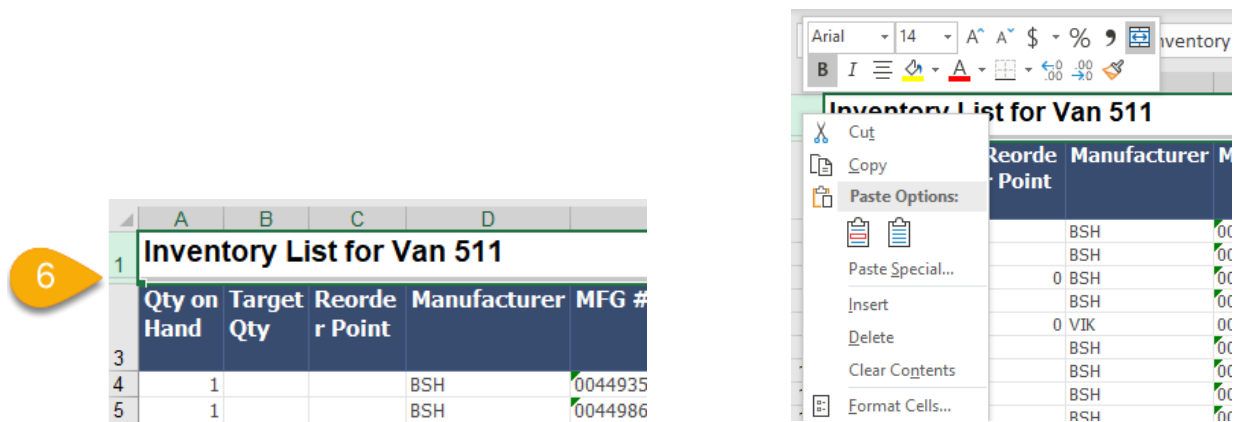
7. Double click the tab that says Sheet 1 in order to rename the sheet.

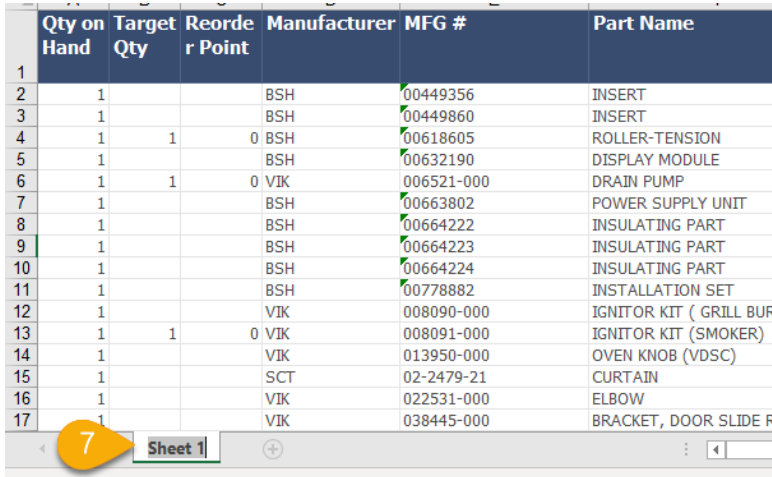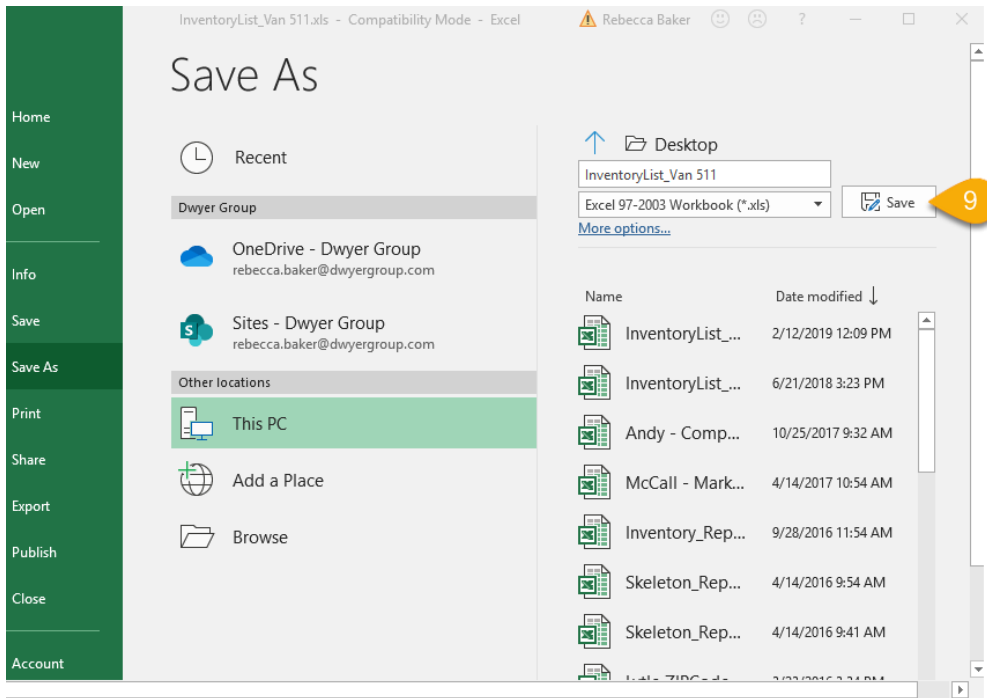8. Enter a new name of "Template". This is what the SmartWare import function looks for to know which sheet to import. It must be typed exactly as shown, capital T, the rest of the letters are lowercase.

9. Save the file on the desktop or other location easily found on your computer.

IMPORT INVENTORY LOCATION

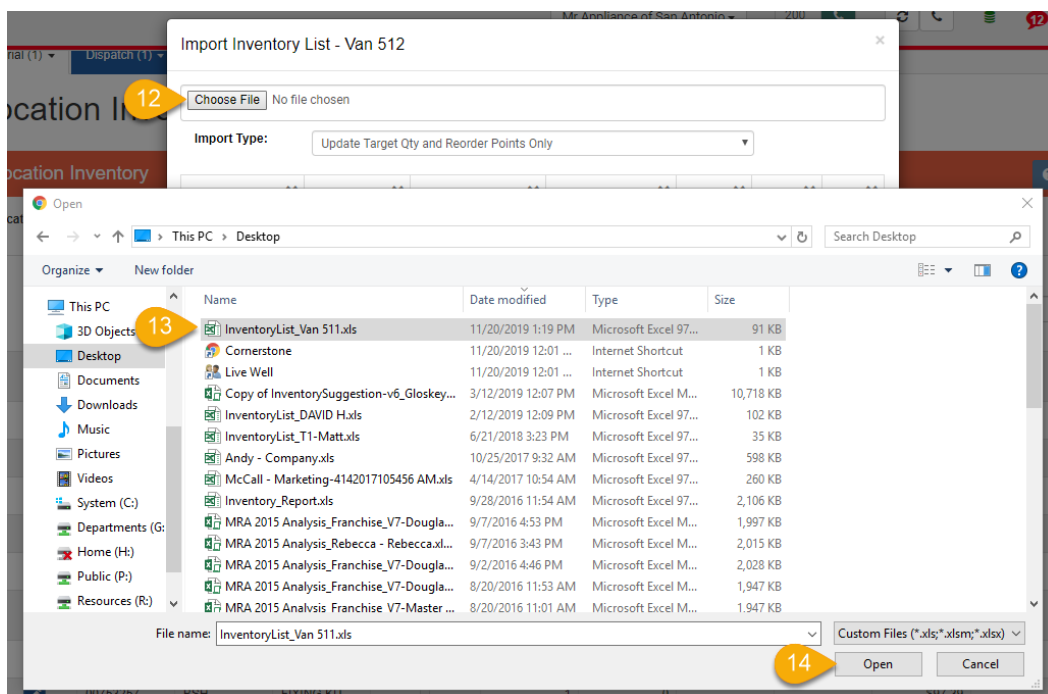10. Go to the location into which the inventory needs to be moved.
11. Click on the Import button.

Location Inventory

12. Click on the Choose File button.
13. Select the file that contains the inventory that needs to be imported.
14. Click on "Open".

15. Select the Import Type. *It is **VERY IMPORTANT** to choose the correct type for your needs as **the import function cannot be undone**!*

    a. "Replace All" will over-write everything that is currently in the location.
        i. If you are swapping vans and need to move the inventory in the destination location, be sure to export the existing data and save it before importing the new location inventory.
    b. "Add Inventory Only" will add the imported inventory to the existing inventory.

16. Click on the Import button.

Import Inventory List - Van 512 ✕

Choose File | InventoryList_Van 511.xls

Import Type: | Update Target Qty and Reorder Points Only ▼

Replace All
Update Target Qty and Reorder Points Only
Add Inventory Only

Qty on Hand	Tar				ne	Cost
1	0	0	BSH	00449356	INSERT	34.26
1	0	0	BSH	00449860	INSERT	44.87
1	1	0	BSH	00618605	ROLLER-TENSION	42.76
1	0	0	BSH	00632190	DISPLAY MODULE	0
1	1	0	VIK	006521-000	DRAIN PUMP	0
1	0	0	BSH	00663802	POWER SUPPLY UNIT	64.11
1	0	0	BSH	00664222	INSULATING PART	8.43
1	0	0	BSH	00664223	INSULATING PART	8.43
1	0	0	BSH	00664224	INSULATING PART	8.43
1	0	0	BSH	00778882	INSTALLATION SET	53.5

Search   « ‹ **1** 2 ... › » 1 - 10 displayed , 154 in total

 Import | Cancel

BSH   FIXING KIT

17. Click on "Done".
18. The inventory from the Excel file is now in the new location.