

## 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.

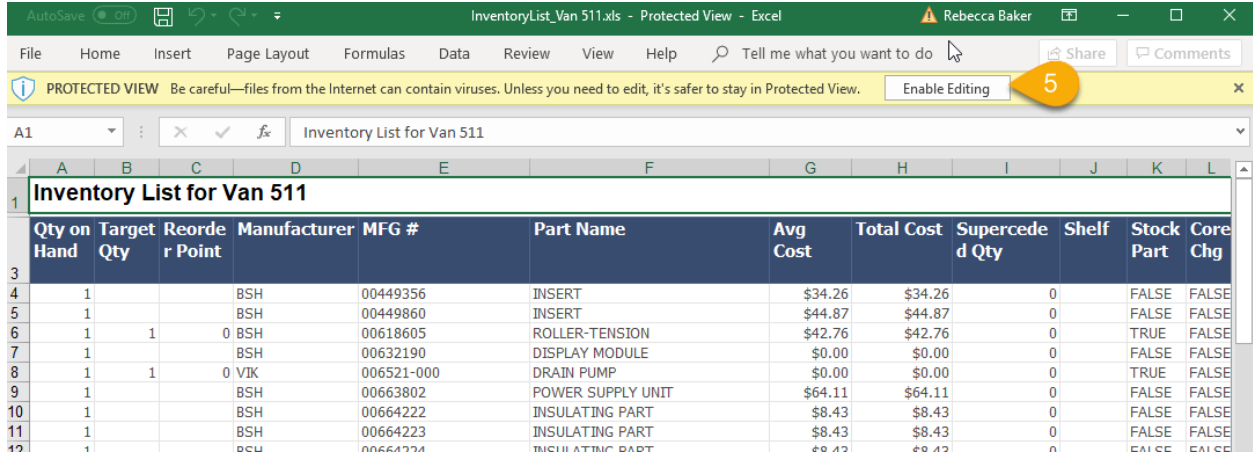
The screenshot shows the 'Location Inventory' interface. The 'Location' dropdown is set to 'Van 511'. The 'Include 0 Quantity' checkbox is unchecked. A table lists inventory items with columns for MFG #, Manufacturer, Part Name, Stock Part, Qty on Hand, Superseded Qty, Target Qty, Reorder Point, Total Cost, Shelf, Core Charge, and PO On Order. The 'Export to Excel' button is highlighted with a yellow circle and the number 3.

	MFG #	Manufacturer	Part Name	Stock Part	Qty on Hand	Superseded Qty	Target Qty	Reorder Point	Total Cost	Shelf	Core Charge	PO On Order
<input checked="" type="checkbox"/>	00449356	BSH	INSERT	<input type="checkbox"/>	1	0			\$34.26		<input type="checkbox"/>	0
<input checked="" type="checkbox"/>	00449660	BSH	INSERT	<input type="checkbox"/>	1	0			\$44.87		<input type="checkbox"/>	0
<input checked="" type="checkbox"/>	00618605	BSH	ROLLER-TENSION	<input checked="" type="checkbox"/>	1	0	1	0	\$42.76		<input type="checkbox"/>	0
<input checked="" type="checkbox"/>	00632190	BSH	DISPLAY MODULE	<input type="checkbox"/>	1	0			\$0.00		<input type="checkbox"/>	0
<input checked="" type="checkbox"/>	006521-000	VIK	DRAIN PUMP	<input checked="" type="checkbox"/>	1	0	1	0	\$0.00		<input type="checkbox"/>	0
<input checked="" type="checkbox"/>	00663802	BSH	POWER SUPPLY UNIT	<input type="checkbox"/>	1	0			\$64.11		<input type="checkbox"/>	0
<input checked="" type="checkbox"/>	00664222	BSH	INSULATING PART	<input type="checkbox"/>	1	0			\$8.43		<input type="checkbox"/>	0
<input checked="" type="checkbox"/>	00664223	BSH	INSULATING PART	<input type="checkbox"/>	1	0			\$8.43		<input type="checkbox"/>	0
<input checked="" type="checkbox"/>	00664224	BSH	INSULATING PART	<input type="checkbox"/>	1	0			\$8.43		<input type="checkbox"/>	0
<input checked="" type="checkbox"/>	00778882	BSH	INSTALLATION SET	<input type="checkbox"/>	1	0			\$53.50		<input type="checkbox"/>	0

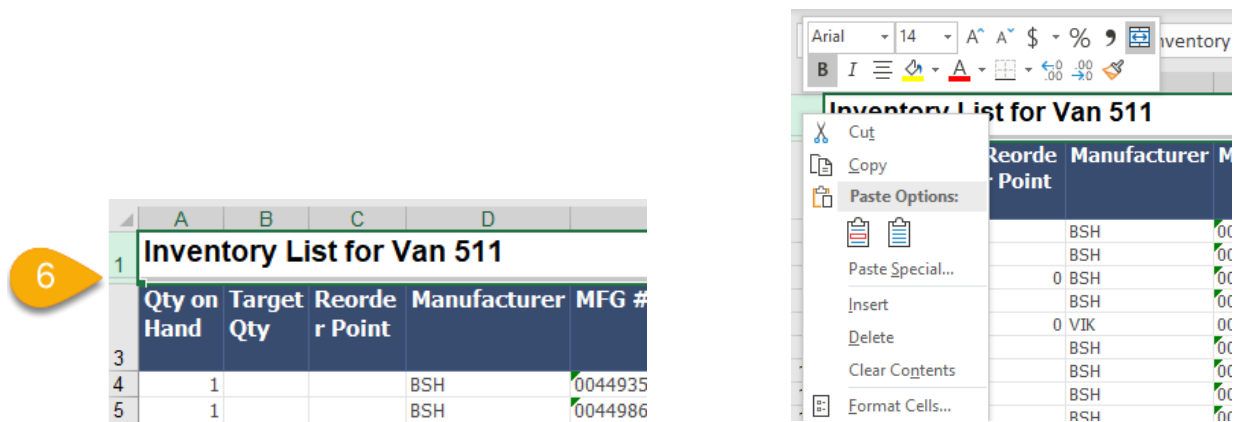
4. The file will open in the lower left-hand corner of the browser. Click on the file to open it.

The screenshot shows the 'Export to Excel' button in the interface. Below it, a browser window displays the file 'InventoryList\_Van 5...xls'. The file is highlighted with a yellow circle and the number 4.

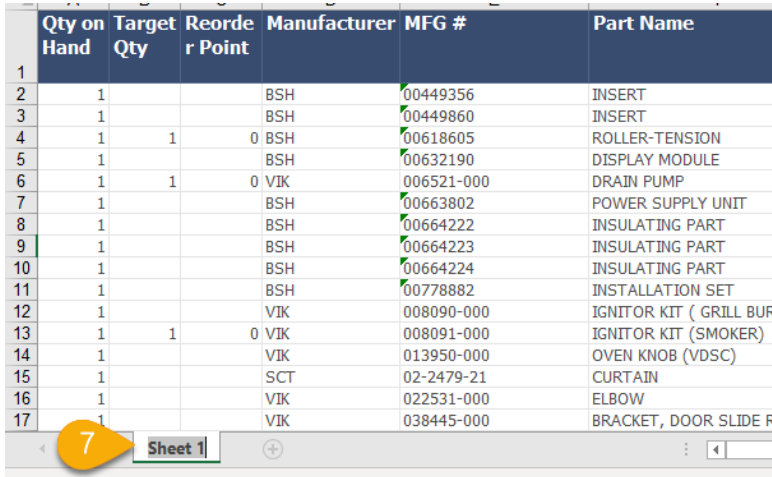
- Click on "Enable Editing" in the yellow bar in the Excel file.



- 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.)



- Double click the tab that says Sheet 1 in order to rename the sheet.

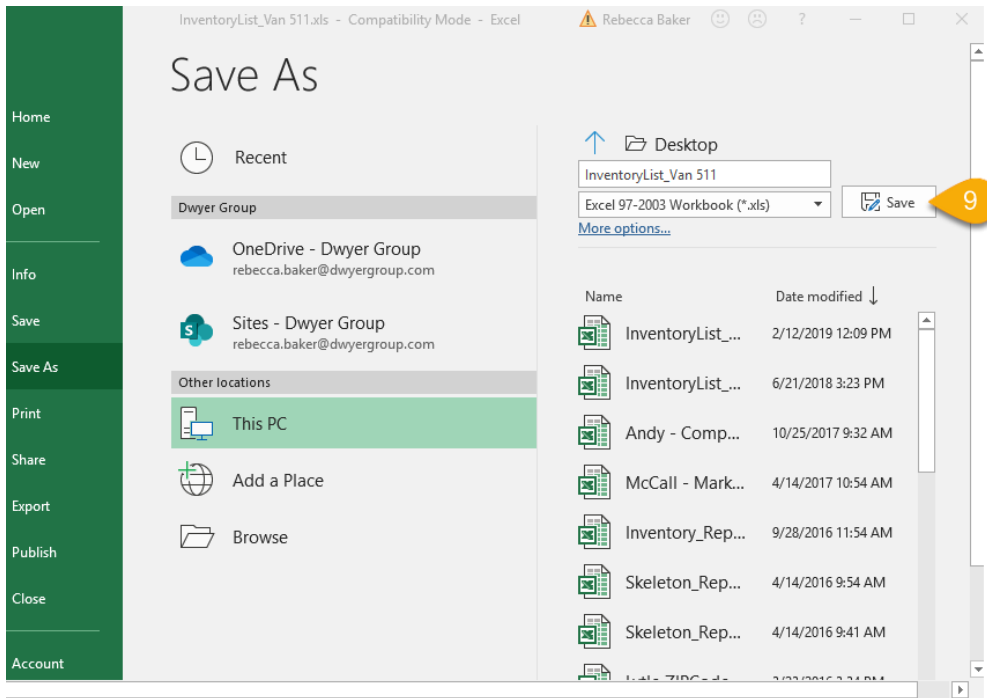


- Enter a new name of "Template". This is what the SmartWare import function looks for to know which sheet to import. It must be typed exactly as shown, capital T, the rest of the letters are lowercase.

Qty on Hand	Target Qty	Reorder Point	Manufacturer	MFG #	Part Name
1			BSH	00449356	INSERT
1			BSH	00449860	INSERT
1	1	0	BSH	00618605	ROLLER-TENSION
1			BSH	00632190	DISPLAY MODULE
1	1	0	VIK	006521-000	DRAIN PUMP
1			BSH	00663802	POWER SUPPLY UNIT
1			BSH	00664222	INSULATING PART
1			BSH	00664223	INSULATING PART
1			BSH	00664224	INSULATING PART
1			BSH	00778882	INSTALLATION SET
1			VIK	008090-000	IGNITOR KIT ( GRILL BURNER )
1	1	0	VIK	008091-000	IGNITOR KIT (SMOKER)
1			VIK	013950-000	OVEN KNOB (VDSC)
1			SCT	02-2479-21	CURTAIN
1			VIK	022531-000	ELBOW
1			VIK	038445-000	BRACKET, DOOR SLIDE RIGHT

8 **Template**

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



## IMPORT INVENTORY LOCATION

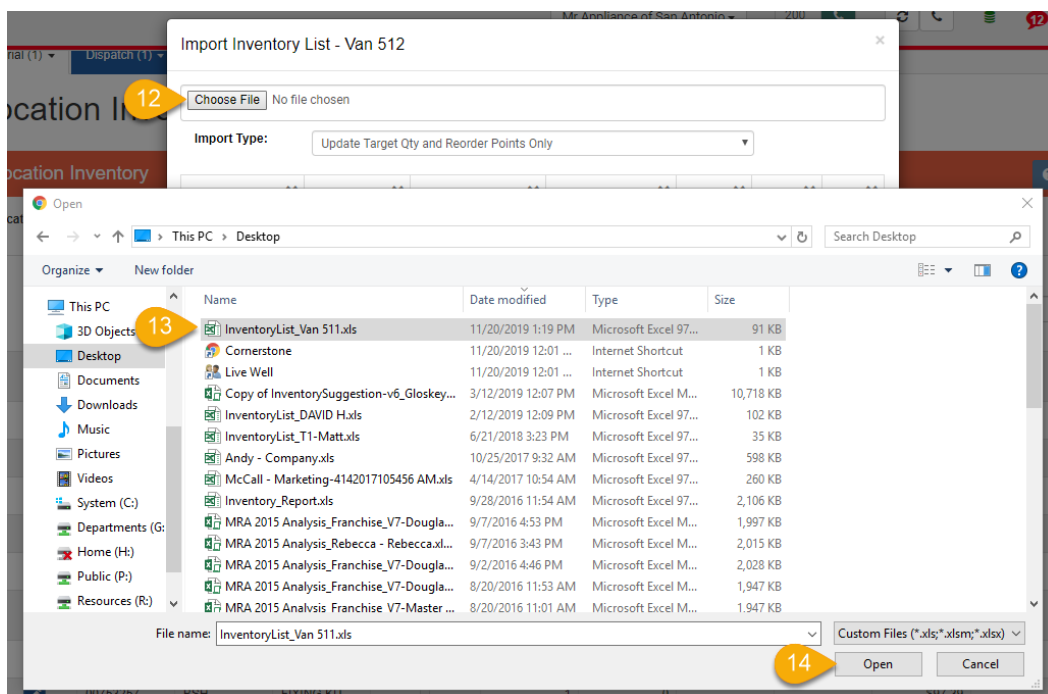
- Go to the location into which the inventory needs to be moved.
- Click on the Import button.

### Location Inventory

Location: Van 512      Include 0 Quantity:

	MFG #	Manufacturer	Part Name	Stock Part	Qty on Hand	Superseded Qty	Target Qty	Reorder Point	Total Cost	Shelf	Core Charge	PO On Order
<input type="checkbox"/>	00189324	BSH	IGNITION HEAD	<input type="checkbox"/>	1	0			\$17.49		<input type="checkbox"/>	0
<input type="checkbox"/>	00189968	BSH	SWITCH	<input type="checkbox"/>	1	0			\$74.70		<input type="checkbox"/>	0
<input type="checkbox"/>	00414396	BSH	SWITCH	<input type="checkbox"/>	1	0			\$8.71		<input type="checkbox"/>	0
<input type="checkbox"/>	00428049	BSH	SWITCH	<input type="checkbox"/>	1	0			\$6.22		<input type="checkbox"/>	0
<input type="checkbox"/>	00491861	BSH	AIR DUCT	<input type="checkbox"/>	1	0			\$74.70		<input type="checkbox"/>	0
<input type="checkbox"/>	00604947	BSH	FUSE	<input type="checkbox"/>	1	0			\$29.86		<input type="checkbox"/>	0

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	Target	Reorder	Part No	Description	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

16 Import Cancel

17. Click on "Done".

18. The inventory from the Excel file is now in the new location.