

Inventory Import Tools

Robert:

Did you see the new line of paints that came this week?

Andrew:

Yeah... They're still in the back. I need to add them to the system before we can put them on the floor. Wanna give me a hand?

Robert:

Sure, if we import a spreadsheet, we'll be done in no time! Come on, I'll show you how!

Andrew:

Pick topic to see the import process!

Topics

- Open Import File
- Build Import Map
- Completing the Import
- Fixing Errors

Open Import File

A common way to add inventory to Eagle is to import it from a spreadsheet file. The file must be formatted as a CSV or TXT file. Your vendor may provide this for you.

When you prepare the spreadsheet, enter fields as needed. Ensure that a column exists for department or you'll get an error that prevents you from completing the import.

Once your file is prepared, open the Inventory Import Designer.

Select the type of spreadsheet you'll use.

Use the Comma delimited setting with CSV files, and select Tab Delimited for TXT documents.

Select Open from the ribbon.

Locate the file on your computer and press Open.

With a file selected, the path is displayed in the center of the window.

The next step is to map out the data.

Build Import Map

Now that you've selected your document for the Inventory Import, it's time to configure the map that designates the fields each column represents.

Select Input in the ribbon menu. Eagle displays the first 10 lines of the spreadsheet.

Choose Map Field and match the spreadsheet column to the Eagle field.

You can type the first letter of the field to jump to that letter. Select the desired field, and press OK.

Note the Max Length for each column. If the number of characters in a record exceeds this number, Eagle gives an error when you try to import.

Enter the column Position to populate the field you chose.

Note that the first column shown reflects the record count and is not counted.

Select OK to finish mapping this field.

Repeat the process for each field you want to include in the map.

Make sure to include a Department field, otherwise the system cannot import the data file.

Once you complete your map, a best practice is to save the map to use for similarly formatted documents in the future.

You can keep this view for later use or use an existing one with the Save View and Load View functions in the File Menu.

Completing the Import

With the spreadsheet selected, and the map formatted, you're ready to import the inventory data.

Complete the Import Options section.

If you already have SKU and Vendor as part of your source file, leave these fields blank.

Select the store and enter a unique flex name. A best practice is to use a combination of date and user.

If this import adds new SKUs to your system, enable the File contains adds option.

Select the stores to add this item to in the Stores for field. You cannot complete the import with this field blank.

If the top spreadsheet row contains titles, enable the Ignore first record option since that record is not a product.

Select Import, and the Inventory Import confirmation window appears. Press the Import button.

This copies the data to the flexible inventory load file or FIL.

If your import was successful, with no errors, you can Finalize the process. Navigate to the Flexible Inventory Loading function in the Eagle browser.

Select the Flex name from when you completed the Import Options and press Display.

Confirm that the data looks accurate.

Use the Finalize button to open the Flexible Inventory loading report.

On the Options tab, make sure that options B and F are enabled.

Press Run to complete the process and add the items to your inventory. You can now review the spooled report or view the items in Inventory Maintenance.

Fixing Errors

When the Inventory Import Screen displays, it shows how many items, or input records to import, and if there were any errors.

Select View Log to view the Errors. A TXT file displays the error details.

The most common error occurs if an item's description or SKU fields are longer than the Max Length that the Map allows.

Update the spreadsheet to fix the errors.

Another error you may find is Store not in file. This happens when you don't select a store under Import Options.

To fix this, complete the Stores for field, and enter a new Flex Name.

Once you fix any errors, import the file again, and continue with the process as usual.

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