Importing Products – Tips and Best Practices

Product Import Spreadsheet:

- ✓ Use Microsoft Excel as this is the software used to develop the import spreadsheet.
- ✓ Always copy the original file from the Imports folder ensuring the initial spreadsheet is preserved for future use.
- ✓ Use an alternate folder to store modified Import files for loading into BisTrack.
- ✓ The spreadsheet is updated during BisTrack upgrades so be sure to use the most recent version.

Spreadsheet Data:

- ✓ Determine the importance of the data to enter in the non-required Green and Black Columns.
- ✓ Do not change the format of the columns as it is relevant when importing the data into BisTrack.
- ✓ When inserting new products, set the Cost and Sell Price data by Branch using the Branch Prices tab.
- ✓ Use appropriate default values as indicated in the column heading comments for data not available.
- ✓ Refer to *Product Properties* in BisTrack for more clarity on any fields you are not familiar with.
- ✓ Each tab containing import data must have the *ProductCode* populated, and if the tab is Branch specific, the *BranchCode* as well.
- ✓ When updating existing records, all required columns (Red) do not have to be populated unless you are adding new table information (i.e. Supplier Prices data that did not exist before in BisTrack).

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✓ Import fields can contain Excel Formulas. For example, when importing dimensional lumber products, Child Buy prices can be calculated from a manually entered Parent Buy Price.

✓ Before importing, make sure all Excel data fields are *Text* type for maximum data integrity.

✓ The *Stock Actual* and *Stock Tally* columns in the Stock Options tab must never have any data. Stock figures cannot be imported into a live BisTrack.

Running BisTrack Import:

✓ Develop, test and validate imports in the Training database. Some complex Imports will pass *Validate only* but will fail with an error message on *Validate and import*.

✓ Export the Results tab errors to an Excel spreadsheet. This will allow you to easily go back and forth between the error messages and the import spreadsheet to make changes.

✓ Always make a backup of the Products database just before you *Validate and import*.

✓ To avoid slowing down your system, Run Production BisTrack Imports for large Product spreadsheets after hours.

✓ Temporarily disable audits for Product additions to significantly speed up large Insert imports.

✓ Only proceed with the Validate and import option when you are confident the data is accurate and you have a backup available. There is no UNDO!

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