

## Importing Products Transcript

Imagine your business is adding a new product line; a full display of door knobs and hinges consisting of several hundred items. Before you can start to buy and sell these, you need to enter them into your Products file. For mass entry of new products, the job can be done faster and easier using a spreadsheet and the BisTrack Import routine!

In this course, we'll introduce you to the Product Import spreadsheet and review the included data fields. Then we'll show you how to use BisTrack Import to add new products and update existing ones. Make sure you open and review the Tips and Best Practices document found in the course materials section.

BisTrack provides all systems with a Product Import spreadsheet that you can use to enter data for the products you want to add or change in the system. An original copy of it is located in the BisTrack Program Files directory. If you have access to your SQL server, locate it by navigating this path: C:\Program Files (x86)\Progressive Solutions\BisTrack Server\Imports.

Contact BisTrack Support if you need assistance locating this file on your system. A Best Practice is to always copy the original file from the Imports folder and store it in a different folder. This ensures that you preserve the initial spreadsheet for future use. It's also a good idea to rename it with a date or description about the contents. Here, we have a folder open called Import Spreadsheets. We previously copied the Product Import spreadsheet, and then renamed it: Doorknobs. We'll select and open the file.

Several products have already been added to the spreadsheet. It has a number of Sheets within it, noted by the tab names shown across the bottom. Some of the names are similar to the Tabs found in Product Properties. Row 1 of each Sheet has several of the BisTrack SQL database fieldnames that are matched when the import routine is run.

You enter product details starting in row 2 and below. Each row in the spreadsheet adds or updates a product in BisTrack. Fieldnames are displayed in

either Red, Green or Black. Red indicates an entry is mandatory in this column for the import to be successful. Green is suggested as valuable to use, and Black is considered optional. You will need to determine the importance of the data to enter in the non-required Green and Black Columns.

Many of the fieldnames in row 1 have hints imbedded as Excel Comments, indicated by the red triangle. Clicking the triangle in the Product Type column advises that the entry expected is a number that matches the kind of product being inserted. As all the products are Generic, the 1 was copied to all other rows.

Columns are formatted as either General or Text. Here, the PerRuleID column is General or right aligned, while ProductCode is Text formatted or left aligned. Do not change the pre-set format of the columns since it will affect importing the data into BisTrack.

The data you enter consists of two types. First, is Actual or Free-form data such as the ProductCode, Description, and ManufacturerCode. The second, is Linked data that comes from another BisTrack table where an ID or Code is used as the look up key. Examples of these include the PerRuleID and ProductGroupID columns. Linked data columns often require an ID which has been set in BisTrack. Refer to the Comment for instructions on how to find the ID.

The PerRuleID instruction says In System Manager, under Products. Click the Per Rules link and right click to show IDs. A Per Rule is also known as a UOM Rule. In BisTrack System Manager, select the Products view , and then UOM Rules.

Search for the rule that applies to the new products. Select it, open the right-click menu and choose Show IDs. A new column is displayed listing the IDs that were automatically assigned to the UOM Rule when it was added to the table. This is the value that is entered into the Import spreadsheet.

Copy and Paste the value to all applicable products in the spreadsheet. There may be some mandatory fields that won't apply to the products you're adding. For example, Thickness and Width would not apply to the Generic products in this spreadsheet. Enter the data as instructed in the Comment.

When adding new products, entries on the Products tab are required. Some of the other mandatory fields on this tab include Supplier Code, Standard Buy and Sell Prices, and Sale Analysis Code IDs. Entries on the other tabs are optional when inserting products. A Best Practice however, is to enter data on the Branch Prices tab where the AverageCost and AverageCostWithAdditional are set for each Branch. When the StandardBuyPrice and StandardSellPrice are maintained by Branch, those amounts would also be populated here. Leave this blank if you maintain prices by Company.

Once you have finished entering the new products into the spreadsheet, the next step is to import them into BisTrack. In System Manager Products view, open the Products Taskpad and then Product Import. First, select the file by clicking on the browser icon. Find the folder where the import spreadsheet was saved.

The filename is shown and Import type is automatically set to Product Import. The Details displayed are taken from the spreadsheet. When adding products, the option to Insert new records is selected. To safeguard your existing data, a Best Practice is to run the import using the Validate Only option first.

It identifies errors in the data that will need to be fixed before it can be imported successfully. You should run the initial import within the Training or Test database first to ensure the results meet your expectations. Click the Apply button to run the validation. Errors in the data appear on the Results tab.

If there are a lot of errors, you can right click in the results area and choose to export the lines to Excel. The Worksheet tab name, row number, and error description are provided for you to locate the problem. Note that the error message row is offset by one line due to the header on the Import spreadsheet. Always add one to the row number shown.

In this case, it appears a Supplier Code is missing for a product. Re-open the Import spreadsheet to fix the error. From the Results we know the problem occurred on row 15 of the Products sheet. We can confirm the ProductCode matches the line. Scrolling across to the SupplierCode, we see the blank cell that is causing the problem.

The code is entered and then the spreadsheet is saved and closed. Return to the BisTrack Import program and re-select the same file. Run the program using the Validate only option until there are no further problems with the data.

The Results tab shows the number of records that will be Imported or Skipped, the Elapsed Time, and any further Warnings about the data. The Messages tab, indicates the import validation completed without errors. At this point, set the option to Validate and import and then Apply the routine. When the import is complete, confirm the new items were inserted as expected.

The Update option is the most powerful BisTrack Import feature. You might use it to update Min Max stock values, or change the Default Supplier. We have a spreadsheet where the Min and Max values have been set for a list of products. The Branch and ProductCode are critical for matching the correct item in BisTrack.

Values have been entered for each row of the StockLevelMin and StockLevelMax columns. As this is the only information being updated, the other sheets can be left blank. The spreadsheet is saved and closed. At the BisTrack Import window, select the file to import.

When the file is loaded, change the method to Update records. Now you can Select columns to be updated. A window opens listing the Tabs from the import spreadsheet. You can select an entire Tab by clicking in the box alongside the name. Or, you can expand a Tab, and pick the specific columns to update.

Remember ProductCode, and where applicable BranchCode, must be selected. When finished, click the OK button. For the first run, have the Validate only option set. Click Apply to run the import routine. When the import is done, and if there are no errors, the Results tab displays the name of Sheet used and the number of records to be imported. You can proceed to Validate and import the update. If the spreadsheet has errors, follow the steps previously explained to troubleshoot and fix the problems.

Adding and maintaining products is an ongoing activity that can be simplified using BisTrack Import. You should now be able to find and use the Import spreadsheet to enter product information and then use it with the Import routine

to insert or update products in BisTrack. Make sure you open and review the Tips and Best Practices document located in the Course Materials.

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