

# Import Inventory

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Pathway: [Operations > Inventory Management](#)

The Import Inventory tool is used to mass import equipment inventory from an external CSV file into Navusoft. This article details that process and includes the CSV file requirements for a successful upload.

The screenshot displays the 'INVENTORY MANAGEMENT' interface. At the top, there's a navigation bar with 'OPERATIONS > INVENTORY MANAGEMENT'. Below it, a 'LINE OF BUSINESS' dropdown is set to 'All', with a red arrow pointing to an 'IMPORT INVENTORY' button. A search bar and a refresh icon are also present. The main area contains a table with the following data:

LINE OF BUSINESS	EQUIPMENT TYPE	SERIALIZED	TOTAL QUANTITY	SITE QUANTITY	YARD QUANTITY
Commercial	10 Yard FL (Ser)	Yes	32	20	12
Commercial	2 Yard FL	No	37	4	33
Commercial	2 Yard FL VIP	No	0	0	0
Commercial	3 Yard FL	No	0	0	0
Commercial	3 Yard FL VIP	No	0	0	0
Commercial	4 Yard FL	No	0	0	0
Commercial	4 Yard FL VIP	No	0	0	0
Commercial	6 Yard FL	No	0	0	0
Commercial	6 Yard FL VIP	No	0	0	0
Commercial	8 Yard FL	No	0	0	0
Document Destruction	96 Gallon cart Document destruction	No	0	0	0
Medical Waste	18 Gal Box	No	0	0	0
Medical Waste	18 Gal Sharp	No	0	0	0
Medical Waste	200 Gal Cart	No	0	0	0
Medical Waste	2 Quart Sharps	No	0	0	0

Below the table, there are filters for 'DIVISION' (set to 'All') and 'SERVICE REGION' (set to 'All'). There are also 'ADD TO YARD' and 'ADD TO SITE' buttons. At the bottom, there's a table header for a detailed view with columns: LOCATION NAME ↑, ADDRESS, QUANTITY, LAST ACTIVITY, DAY(S) SINCE LAST ACTIVITY, and AVG DAY(S) BETWEEN ACTIVITY.

## File Requirements



Import Inventory only supports the CSV file format.

## CSV File Layout

Each upload must adhere to the following column format:

Column	Description	Logic
Yard	Matches on Yard ID or Yard Name.	If empty, or a match is not found, the record will be rejected.
Site	Matches on Site ID or External ID.	If empty, or a match is not found, the record will be rejected.
Equipment Type	Matches on Equipment Type ID or Equipment Type Name.	If empty, or a match is not found, the record will be rejected.

<p align="center"><b>Quantity</b> <i>Non-Serialized</i></p>	<p>Used for equipment types that are not serialized. Enter the Quantity of the equipment type that should be recorded from the upload.</p> <p>For serialized equipment, enter a value of "1."</p>	<p>If the equipment type IS NOT serialized a quantity is required or the record will be rejected.</p> <p>If a site inventory or yard inventory record already exists for the same site or yard and equipment type, the quantity will be updated. Otherwise, a new record is created.</p>
<p align="center"><b>Serial Number</b> <i>Serialized</i></p>	<p>Column used for equipment types that are serialized.</p> <p>For serialized equipment types, create a new record (row) in the file to separate.</p>	<p>If the equipment type IS serialized, a serial number must be added or the record will be rejected.</p> <p>If a site inventory or yard inventory record already exists for the same site or yard, equipment type and serial number, the record will be rejected.</p>
<p align="center"><b>Note</b></p>	<p>Available to capture notes that should display along with the equipment in the inventory screens.</p>	<p>N/A</p>

## CSV Examples

Serialized and non-serialized inventory can all be included in one file.

### Non-serialized

Review the highlighted cells for an example of adding non-serialized inventory.

	A	B	C	D	E	F
1	<b>Yard</b>	<b>Site</b>	<b>Equipment Type</b>	<b>Quantity</b>	<b>Serial Number</b>	<b>Note</b>
2	1002		10 Yard FL (Ser)	1	123ABC	Serialized Example
3	Home Yard		10 Yard FL (Ser)	1	99887	Serialized Example
4		41902	10 Yard Open Top	2		Non-Serialized Example
5		32891	20 Yard Roll Off	1		Non-Serialized Example
6						
7						
8						
9						
10						

This image includes an example using Site Name and Site ID to map the inventory to a site. The same method can be applied when mapping non-serialized equipment to a yard.

## Serialized

Serialized equipment types must be itemized and can not include more than one serial number. Review the highlighted cells for an example of adding serialized inventory.



Enter a "1" value in the Quantity field for serialized equipment; otherwise, the record will be rejected.

	A	B	C	D	E	F
1	Yard	Site	Equipment Type	Quantity	Serial Number	Note
2	1002		10 Yard FL (Ser)	1	123ABC	Serialized Example
3	Home Yard		10 Yard FL (Ser)	1	99887	Serialized Example
4		41902	10 Yard Open Top	2		Non-Serialized Example
5		32891	20 Yard Roll Off	1		Non-Serialized Example
6						
7						
8						
9						
10						

*This image includes an example using Yard Name and Yard ID to map the inventory to a yard. The same method can be applied when mapping serialized equipment to a site.*

## Upload Complete

After an upload is complete, the user will receive a notification alert along with a Confirmation popup that provides access to an Import Response file. In that file, users will see all of the same column information as their import file, with the addition of Status and Rejection Reason columns.



If a record is rejected, correct the information mentioned in the Rejection Reason column and upload the file again.

**Best Practice Tip:** remove the records that were successfully uploaded to prevent the possibility of duplicates.

