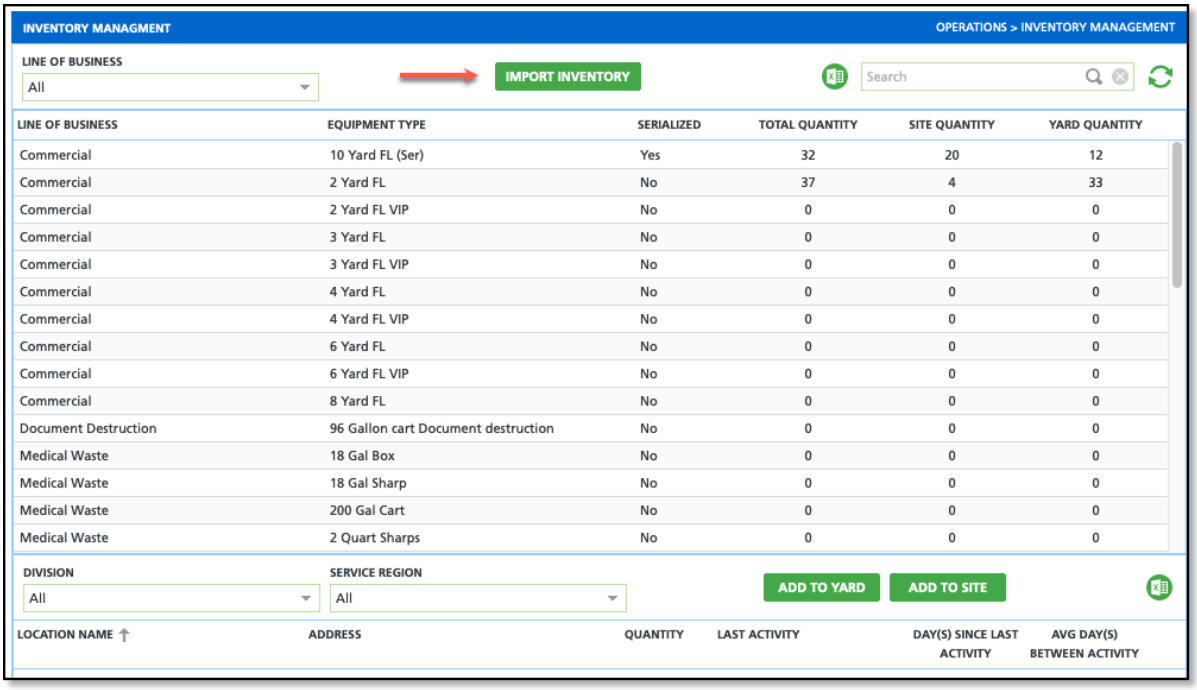
Import Inventory

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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.

Import Inventory only supports the CSV file format.



Import Inventory

The import inventory process is simple and improves efficiency because it replaces manual, one-by-one data entry with a single, automated action.

1. From the Inventory Management screen select the **Import Inventory** button.
2. Select a File to import. It must be in the csv format as described in the next section.
3. Select **Import** and then **OK** when the Message pops up indicating the import process has started. You will be notified once it is complete.

CSV Import File Requirements

A successful upload requires that the import file follow a specific format- it **must** adhere to the column order and rules as shown below.

The first row of your CSV file must contain the column headers.
The table below outlines each header name, its description, and the specific logic used to process your data during import.

Column Header	Description	Logic
Yard	Matches on Yard ID or Yard Name.	If empty and Site is empty, or a match is not found, the record will be rejected.
Site	Matches on Site ID or External ID.	If empty and Yard is 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.
Quantity	Required For non-serialized equipment, enter the Quantity of the equipment type that should be recorded from the upload. For serialized equipment, enter a value of "1."	If the equipment type IS NOT serialized a quantity is required or the record will be rejected. 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.
Serial Number *Serialized*	Required - For Serialized Equipment Only. Enter the serial number of the equipment being added. For serialized equipment types, create a new record (row) in the file to separate.	If the equipment type IS serialized, a serial number must be added or the record will be rejected. 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.
Note	Available to capture notes that should display along with the equipment in the inventory screens.	N/A
RFID *Serialized*	Optional - For Serialized Equipment Only. Enter the RFID number of the Equipment Type being added. For serialized equipment types, create a new record (row) in the file to separate.	If the equipment type IS serialized, a RFID can be added. If left blank, the record will still be processed.

CSV Import File Examples

Serialized and non-serialized inventory can all be included in one CSV file. The first row MUST be column headers.

Non-serialized

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

	A	B	C	D	E	F	G
1	**Yard**	**Site**	**Equipment Type**	**Quantity**	**Serial Number**	**Note**	**RFID**
2	1002		42 Yard Receiver (Ser)	1	123ABC	Serialized - with RFID	R4321
3	1002		30 Yard Open Top	1	S99876	Serialized -No RFID	
4	Home Yard		30 Yard Open Top	1	S99876	Serialized - Duplicate Serial Number BAD	
5	1002	41902	30 Yard Open Top	1	S34567	Serialized - Yard and Site BAD	R222
6		41902	10 Yard Open Top	1	S111222	Serialized - Site	
7	1002		10 Yard Open Top	1		Serialized - No Serial Number BAD	R334445
8	1002		10 Yard Open Top		S777888	Serialized - No Quantity BAD	
9		41902	20 Yard Compactor	2		Non-Serialized - Site	
10		32891	20 Yard Compactor	5	S2277	Non-Serialized - with a Serial Number BAD	
11	1002		15 Yard Roll Off	3		Non-Serialized - Yard	
12		41902	15 Yard Roll Off			Non-Serialiized - No Quantity BAD	
13			15 Yard Roll Off	1		Non-Serialized - No Site or Yard BAD	

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. The RFID can be added but is not required.

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

	A	B	C	D	E	F	G
1	**Yard**	**Site**	**Equipment Type**	**Quantity**	**Serial Number**	**Note**	**RFID**
2	1002		42 Yard Receiver (Ser)	1	123ABC	Serialized - with RFID	R4321
3	1002		30 Yard Open Top	1	S99876	Serialized -No RFID	
4	Home Yard		30 Yard Open Top	1	S99876	Serialized - Duplicate Serial Number BAD	
5	1002	41902	30 Yard Open Top	1	S34567	Serialized - Yard and Site BAD	R222
6		41902	10 Yard Open Top	1	S111222	Serialized - Site	
7	1002		10 Yard Open Top	1		Serialized - No Serial Number BAD	R334445
8	1002		10 Yard Open Top		S777888	Serialized - No Quantity BAD	
9		41902	20 Yard Compactor	2		Non-Serialized - Site	
10		32891	20 Yard Compactor	5	S2277	Non-Serialized - with a Serial Number BAD	
11	1002		15 Yard Roll Off	3		Non-Serialized - Yard	
12		41902	15 Yard Roll Off			Non-Serialiized - No Quantity BAD	
13			15 Yard Roll Off	1		Non-Serialized - No Site or Yard BAD	

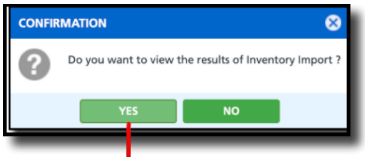
This image includes an example using Yard Name and Yard ID to map the inventory to a yard. Just like yard, site name or site ID can be used to map inventory to a site.

Import Results

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.



Site	Yard	Equipment Type	Serial Number	Quantity	Note	RFID	Rejection Reason	Status
	1002	42 Yard Receiver (Ser)	123ABC	1	Serialized - with RFID	R4321		Success
	1002	30 Yard Open Top	123ABC	1	Serialized - with RFID	R4321		Success
	Home Yard	30 Yard Open Top	S99876	1	Serialized - Duplicate Serial Number BAD		Yard Inventory exists for the provided Equipment Type and Yard and Seri	Failure
41902	1002	30 Yard Open Top	S34567	1	Serialized - Yard and Site BAD	R222	Either Yard or Site information should be null	Failure
41902		10 Yard Open Top	S111222	1	Serialized - Site			Success
	1002	10 Yard Open Top		1	Serialized - No Serial Number BAD	R334445	Serial Number is missing for Serialized Equipment Type	Failure
	1002	10 Yard Open Top	S777888		Serialized - No Quantity BAD		Null value in column 3 is invalid	Failure
41902		20 Yard Compactor		2	Non-Serialized - Site			Success
32891		20 Yard Compactor	S2277	5	Non-Serialized - with a Serial Number BAD		Serial Number should be empty for Non-serialized Equipment Type	Failure
	1002	15 Yard Roll Off		3	Non-Serialized - Yard			Success
41902		15 Yard Roll Off			Non-Serialiized - No Quantity BAD		Quantity is missing for Non-serialized Equipment Type	Failure
		15 Yard Roll Off		1	Non-Serialized - No Site or Yard BAD		Mandatory field(s) Equipment Type and Site / Yard missing	Failure

Related Articles

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