

The Inventory Import feature is accessed via the *Inventory > Import From File* menu item. There are four types of import:

1. Balance
2. Transaction
3. LotReceived
4. Consumable

(this feature can also export TrueChem's inventory information – see the bottom section for more information)

The user points the Import feature to a character-separated input file containing inventory information. The character separator should be the “List Separator” character defined in the Windows’ Regional settings – for many people this will be a comma. A header row must be the first row in the input file, and the field names must be spelled exactly as described below. The fields in the input file can be in any order you prefer.

Balance-type Import

This import-type resets the available quantity of a Chemical. This is often used to initially set the quantities for chemicals. If a lot already exists for a Chemical, its amount may be modified so that the overall balance for the Chemical matches what is given in the input file. If a lot does not exist for a Chemical, one will be created. The available fields for the input file are:

1. ConsumableID
2. Field1 through Field12 (consumable fields)
3. ConsumableName
4. Units
5. QTY
6. ConsMin
7. ConsMax
8. TransactionDate
9. PricePerUnit
10. ConsReorderPoint
11. Manufacturer
12. ManufacturerLotID
13. ManufProdDescription
14. Vendor
15. VenAddress
16. VenPhone
17. VenContact
18. VenFax
19. VenEmail
20. VenWebsite
21. VenDescription
22. VenID

- 23. VenProdPartNum
- 24. VenProdDescription

Note that you may use the name ConsInternalPartNumber for Field1.

The input file for a Balance-type import must contain Units, QTY, and at least one of the following: ConsumableID, Field1, ConsumableName. All other fields are optional.

Example input file:

```
ConsumableName, Units, QTY  
Boric Acid, pounds, 50  
Copper Sulfate, gallons, 25
```

Transaction-type Import

This import-type creates transactions against a lot for a chemical. An optional Object field can be associated with a transaction. A LotLabel field in the input file indicates which lot to use. If a LotLabel is not given, then TrueChem looks for an available lot for the given chemical. If a lot cannot be found then that input file row is skipped. The available fields for the input file are:

1. ConsumableID
2. Field1 through Field12 (consumable fields)
3. ConsumableName
4. Units
5. QTY
6. ConsMin
7. ConsMax
8. LotLabel
9. ObjectID
10. ObjectDescription
11. TransactionDate

Note that you may use the name ConsInternalPartNumber for Field1.

The input file for a Transaction-type import must contain Units, QTY, and at least one of the following: ConsumableID, Field1, ConsumableName.

LotReceived-type Import

This import-type creates new lots for a given chemical. There are many uses for this type of import - perhaps you have an external inventory system and its information needs to be input into TrueChem.

Note that if there is a LotRequisitionNumber on the incoming record, then TrueChem will try to convert a requisition with that number into a normal lot. If it can't find one, then it will look for an existing requisition with the same chemical to convert to a normal lot. If it can't find a requisition, then it will create a new lot.

The available fields for the input file are:

1. ConsumableID
2. Field1 through Field12 (consumable fields)
3. ConsumableName
4. Units
5. QTY
6. ConsMin
7. ConsMax
8. LotReceivedDate
9. LotExpirationDate
10. LotField1 through LotField4
11. LotSelect1ID
12. LotSelect1Description
13. PricePerUnit
14. ConsReorderPoint
15. Manufacturer
16. ManufacturerLotID
17. ManufProdDescription
18. Vendor
19. VenAddress
20. VenPhone
21. VenContact
22. VenFax
23. VenEmail
24. VenWebsite
25. VenDescription
26. VenID
27. VenProdPartNum
28. VenProdDescription
29. LotRequisitionNumber (used to find existing requisition to convert to a lot)
30. LotPurchaseOrder
31. LotRequestedDate
32. LotDeliveryDate
33. LotManufacturedDate

Note that you may use the name ConsInternalPartNumber for Field1.

The input file for a LotReceived-type import must contain Units, QTY, and at least one of the following: ConsumableID, Field1, ConsumableName. All other fields are optional.

Consumable-type Import

This import-type creates new consumables (e.g. chemicals) in TrueChem – or it modifies consumables if they already exist in TrueChem. This import will ignore

the QTY field if it is present in the input file.

The available fields for the input file are:

1. ConsumableID
2. Field1 through Field12 (consumable fields)
3. ConsumableName
4. ConsumableShortName
5. Units
6. IsInventoried (yes or no)
7. ConsMin
8. ConsMax
9. ConsReorderPoint
10. ConsRequiresDateExpire (yes or no)
11. ConsConversionUnitID
12. ConsConversionAmount1
13. ConsConversionAmount2
14. PricePerUnit
15. Manufacturer
16. ManufProdDescription
17. Vendor
18. VenAddress
19. VenPhone
20. VenContact
21. VenFax
22. VenEmail
23. VenWebsite
24. VenDescription
25. VenID
26. VenProdPartNum
27. VenProdDescription

Note that you may use the name ConsInternalPartNumber for Field1.

The input file for a Consumable-type import must contain Units, IsInventoried, and at least one of the following: ConsumableID, Field1, ConsumableName. All other fields are optional.

Exporting Inventory Information

It is sometimes desirable to *export* TrueChem's inventory information. You may want to do this so that you can manually adjust the exported file in Notepad or Excel, and then import that information back into TrueChem using the Import feature.

When Exporting, you do not select a name for the destination file – because a filename will be chosen for you. But you do select the type of Export you'd like to do. The fields that are exported are the ones that are available for Importing (see above). Just click the *Export* button to export the inventory information.

Note that for Transaction and Lot Received type exports, only the column headers for the fields are exported. But for the Balance and Consumable type exports, the data is exported as well as the headers.

If you have any questions or need any help, please contact technical support at 1-800-448-2548 ext. 2