

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 (can also be labeled ConsInternalPartNumber)
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

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 (can also be labeled ConsInternalPartNumber)
3. ConsumableName
4. Units
5. QTY
6. ConsMin
7. ConsMax
8. LotLabel
9. ObjectID
10. ObjectDescription
11. TransactionDate

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. The available fields for the input file are:

1. ConsumableID
2. Field1 (can also be labeled ConsInternalPartNumber)
3. ConsumableName
4. Units
5. QTY
6. ConsMin
7. ConsMax

8. LotReceivedDate
9. LotExpirationDate
10. PricePerUnit
11. ConsReorderPoint
12. Manufacturer
13. ManufacturerLotID
14. ManufProdDescription
15. Vendor
16. VenAddress
17. VenPhone
18. VenContact
19. VenFax
20. VenEmail
21. VenWebsite
22. VenDescription
23. VenID
24. VenProdPartNum
25. VenProdDescription

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 (can also be labeled ConsInternalPartNumber)
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

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.