Import Inventory from csv

Last Modified on 14/04/2022 2:05 pm EDT

Using the 'Rental Inventory.csv' template available with the Product Import option in RentalPoint2, you can import Products and their assets using the 'Clear All' 'Match All' functionality in the system.

Access your import templates from the RentalPoint2 main menu



NOTE:

- Any Groups, Categories, Sub Categories that do not already exist in inventory will be created. Any existing Groups, Categories, Sub Categories will be updated.
- All of the fields with an '*' beside them are Asset Fields so the information contained in those fields is stored against the asset record if created.
- Sub-category is NOT necessary. If you don't want to use sub categories, then turn off Operational Parameter 194 'Enable Sub Categories'
- If you want RentalPoint to generate product codes for you, turn on Operational Parameter 177 'Code Generator' and enter details under the Products Tab (Fig 1.1 below), then leave the product code field blank in your csv file
- When importing a comma delimited file 'csv', <u>do not use commas</u> within any cell of your template in order to ensure the data is imported correctly

Please reach out to support@rentp.com should you require assistance with your import.

Fig 1.1

RP	Code Generat	tor		X	¢
Customers Vendors Projects	Products (Renta	al / Sale)	PO	Barcodes <	>
✓ Use Code Generator	Μ	Minimum		refix ngth 0	
O Sequential Numbers					
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First	∧ ▼	odel			
		Save		X Cancel	

To complete the 'Rental Inventory' spreadsheet

- See *TreeView Structure* information for how RentalPoint organizes Inventory.
- Complete fields in the spreadsheet, some are required like fields in the screenshot below the fields do not need to be in any particular order in the import file, I've moved some around for ease of entry. Just keep the names 'as is' for ease of import.
 - Line 1 ensures the headings match those expected so that you can use 'clear all' 'match all' when importing
 - Lines 2,3 import two assets for the product GHH15
 - Cell H identifies the product as asset tracked
 - Cell BB uniquely identifies the asset
 - All field headings with an '*' like cells BB and BD are only used for asset records
 - Lines 4,5,6 import three assets for product SAM60
 - Line 7 imports one NON tracked product with a record of 10 items in stock.
 - Cell H is 'N'
 - Cell G is optional but allows you to scan cables using a product barcode
 - Cell I denotes qty owned

See attached sample file for your reference.

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A	в	с	D	E	F	G	н	1 1 1	IIIN (ETUVXYAAA		AAB BB	BC BD BE
1 Product Group	Group Description	Product Category	Category Description	Product Code	Product Description	Non Tracked Bar Code	Asset Track	Quantity Owne	SI: /HUUFE BR	FENRE2 415 11C C	TFFBar Code Number *	O Asset Description * Model N
2 G1	AUDIO	C1	Powered Speakers	GHH15	GHH 15 Floor Standing Speaker		Y				500001	GHH 15 Floor Standing Speak
3 G1	AUDIO	C1	Powered Speakers	GHH15	GHH 15 Floor Standing Speaker		Y				500006	GHH 15 Floor Standing Speak
4 G2	VIDEO	C2	Displays/Monitors	SAM60	60" Samsung LED Touchscreen		Y				500007	60" Samsung LED Touchscree
5 G2	VIDEO	C2	Displays/Monitors	SAM60	60" Samsung LED Touchscreen		Y				500008	60" Samsung LED Touchscree
6 G2	VIDEO	C2	Displays/Monitors	SAM60	60" Samsung LED Touchscreen		Y				500009	60" Samsung LED Touchscree
7 G1	AUDIO	C3	Speaker Cables	NX1510C	NX15 10' Cable	NX1510	N	10				NX15 10' Cable
8												

Importing the Spreadsheet

Ensure Operational Parameter 65 'Use Assets to Calculate Qty' is set to YES. If you have to set it, then log out of

RentalPoint and back in again before proceeding. You should only have to do this once.

- 1. Backup the Database using SQLBackupandFTP as previously discussed
- 2. Ensure no users are in Inventory Setup so that they are not interfering with any products you are trying to update
- 3. Import files in RentalPoint

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	FU :	HOLD	Fra	Change Operator Ctrl+F3		Import Files
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07	FU :	HOLD	W	Operator Options		Barcode Scan Import

RP	Import Files	X			
Import					
Rental Products	O Components	, Accessories, Alternatives			
○ Sales Products	○ Venue	⊖ Venue			
○ Vendors	O Labour Prod	Labour Products			
 Technicians 	O Rental Rates				
O Customers	○ Sale Prices				
○ Contacts	○ Assets				
 Customers and Contacts 					
Duplicate Records	First Row	File Format			
○ Skip Them	Header	Comma Separated (.CSV)			
Opdate Them	○ Data	\odot Tabular Delimited			
		✓ Next × Cancel			

Load the csv file, then click 'Clear All' 'Match All' 'Leave Maintenance Record As Is' and Import

RP	Import Rental Data	×
Drag fields from 'Import Fields' and drop	o in 'Matching Fields'.	
Import Fields	RentalPoint Fields	Matching Fields
Product Group Group Description	Product Group	Product Group
Product Category	Product Category	Product Category
Category Description Product Code Product Description	Product Code	Product Code
Printed Description Allow Discount	Product Description	Product Description
Office Location	Part Number	Part Number
Unit Volume Unit Weight	Quantity Owned	
Unit Length Unit Width	Country of Origin	Country of Origin
Unit Height	Non Tracked Bar Code Default Accessory Discount	
Cost price Country of Origin	Revenue Code	Revenue Code
Revenue Code		V
You can use the import tool to update asso asset serial number there may be mainten number. You can choose to update the ma serial number, or leave the maintenance re	ance records attached to the serial aintenance records to reflect the new	
	 Leave Maintenance Records As Is 	
* - Denotes fields that are only related to the asset record		Match All Clear All Import Cancel

wait to get this message, then click OK

RentalPoint 11.0 Enterprise	×
Import complete.	
	OK

Review your Inventory Treeview to ensure your records have been set up as expected

From RentalPoint2





From RentalPoint3

