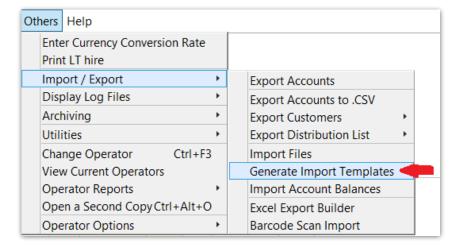
Import Products from Excel File

Last Modified on 09/12/2022 4:07 pm EST

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.

Please take a backup of your database before importing as this operation is not reversible. Consider sending a copy of your import file to support@rentp.com for testing before importing.

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 OR try using a tab delimited version of the file
- Do not use any quotation marks in any cell

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

Fig 1.1

RP Code Generator								
Customers Vendors Projects Products (Rental / Sale)	PO	Barcodes	۲	>				
☑ Use Code Generator Minimum		Prefix ngth 0						
O Sequential Numbers								
Over Defined								
First	1							
First								
		•						
Save		X Cancel						

To complete the 'Rental Inventory' spreadsheet

- See <u>*TreeView Structure*</u> 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.

	5 -∂-						Rental_Inventory.csv						
File	Home	Insert Page Layo	ut Formulas Dat	a Review View	Developer C	tuickBooks Team ♀ Tell me v							
	🔏 Cut	Calibri	- 11 - A A =	= - ≫ - - w	rap Text	General -	Normal	Bad	Good N	eutral Calculation		∑ AutoSum - A	Q
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	А	в	с	D	E	F	G	н	I JIIIN		VAAB BB E	SC BD	BE
1 Pi	oduct Group	Group Description	Product Category	Category Description	Product Code	Product Description	Non Tracked Bar Code	Asset Track	Quantity Ownel SI	I /IIIUFF FRIFENIRE2 (415) (IC C	TFFBar Code Number *	O Asset Description *	* Model Nu S
2 G	L	AUDIO	C1	Powered Speakers	GHH15	GHH 15 Floor Standing Speaker		Y			500001	GHH 15 Floor Stand	Jing Speaker
3 G	L	AUDIO	C1	Powered Speakers	GHH15	GHH 15 Floor Standing Speaker		Y			500006	GHH 15 Floor Stand	Jing Speaker
4 G	2	VIDEO	C2	Displays/Monitors	SAM60	60" Samsung LED Touchscreen		Y			500007	60" Samsung LED To	ouchscreen
5 G	2	VIDEO	C2	Displays/Monitors	SAM60	60" Samsung LED Touchscreen		Y			500008	60" Samsung LED To	ouchscreen
6 G	2	VIDEO	C2	Displays/Monitors	SAM60	60" Samsung LED Touchscreen		Y			500009	60" Samsung LED To	ouchscreen
7 G	L	AUDIO	C3	Speaker Cables	NX1510C	NX15 10' Cable	NX1510	N	10			NX15 10' Cable	

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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Repo	orts Assets	Setup	Others	Help		
î,				ter Currency Conversi nt Long Term	ion Rate	
nd	Open	Vie	w Im	port / Export	+	Export Accounts
	SALES : WH	ISE C)r —	splay Log Files	F	Export Accounts to .CSV
	FU : HO	LD F	ra —	chiving		Export Customers
	FU : HO	LD F		lities	•	Export Distribution List
			Le Ch	ange Operator	Ctrl+F3	Import Files
01	FU : HO	LD 0	Vie	ew Current Operators		Generate Import Templates
	FU : HO	LD F	R Op	erator Reports	•	Import Account Balances
	FU : HO	LD J	er Op	en a Second Copy Ct	rl+Alt+O	Excel Export Builder
07	FU : HO	LD V	V Op	erator Options	•	Barcode Scan Import

RP	Import Files	X				
Import						
Rental Products	○ Components	s, Accessories, Alternatives				
O Sales Products	○ Venue	○ Venue				
○ Vendors	O Labour Prod	ucts				
○ Technicians	Rental Rates					
○ Customers	○ Sale Prices					
○ Contacts	○ Assets					
O Customers and Contacts						
Duplicate Records	First Row	File Format				
○ Skip Them	 Header 	Comma Separated (.CSV)				
Update Them	O Data	○ 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		X						
Drag fields from 'Import Fields' and drop in 'Matching Fields'.									
Import Fields	RentalPoint Fields	Matching Fields							
Product Group	Product Group		Product Group						
Product Category	Product Category		Product Category						
Category Description Product Code	Product Code		Product Code						
Product Description Printed Description	Product Description		Product Description						
Allow Discount 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			✓						
Inventory Import Options	in formation . If we do not define the								
You can use the import tool to update asset asset serial number there may be maintenand									
number. You can choose to update the main serial number, or leave the maintenance reco									
	Leave Maintenance Records As Is								
* - Denotes fields that are only related to the asset record	•	Match All	ear All Import Cancel						

wait to get this message, then click OK

RentalPoint 11.0 Enterprise	x
Import complete.	
	ОК

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

From RentalPoint2

