

Receive Inventory via File Upload

SnapTracker Webinar Wednesday

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Meet your webinar hosts



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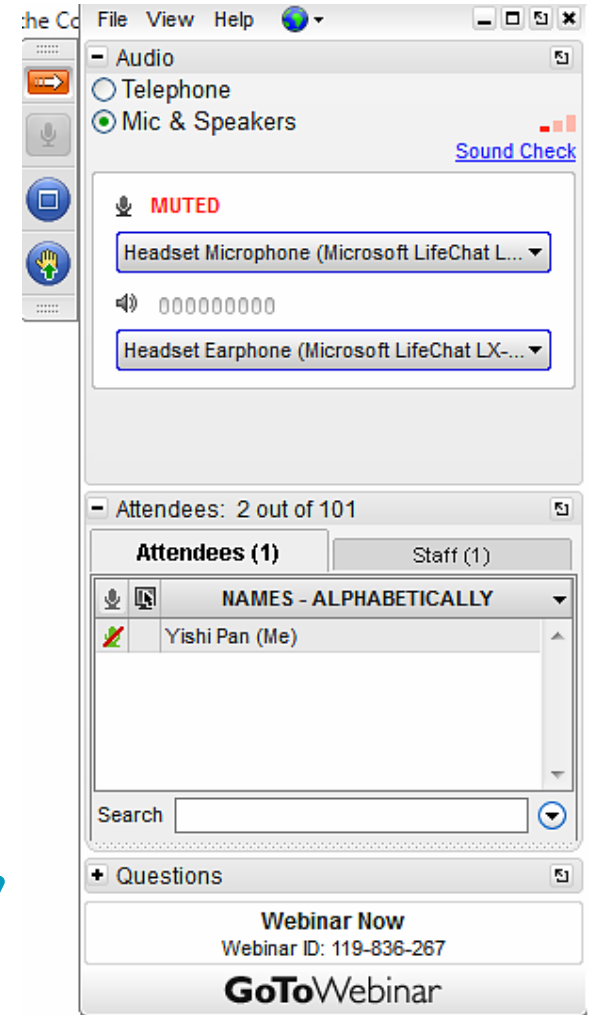
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How to interact today?

Raise your hand-
Let us know if you
have any questions
throughout the
webinar!



Type your comments
and questions here
anytime!



Agenda

- 01 Purpose of File Upload
- 02 Pros and Cons
- 03 Set up your worksheet
- 04 Upload and process the data
- 05 Best Practices



File Upload

The purpose of File Upload is to provide SnapTracker users another method for receiving inventory into the database. File Upload enables the user to create a work sheet and keep track of all the product being received. While the **PDA is the optimum way to receive the inventory**, there are occasions when File Upload is a more viable solution.

The most common situations that would require file upload include:

- 1** The PDA is not available or damaged.
- 2** The warehouse does not have the racking labelled.
- 3** Inventory receiving where the PDA is not available.
- 4** Large transfer of inventory.

Pros

- ✓ It does not require a PDA.
- ✓ It keeps an Excel record.
- ✓ Speed!
By leveraging File Upload the operations team can receive inventory faster.

Cons

- ✗ It's not a best practice.
- ✗ It can create errors (due to transcriptions).
- ✗ It has to be setup precisely.

Set up your
worksheet

This is a critical part of the File Upload process. The Excel spreadsheet must be set up correctly. All file upload functions have **mandatory fields** that must be included or the upload will fail.

For Inventory the spreadsheet **must** contain the following information:

1 standard

2 serial no

3 building

4 location

5 condition

6 quantity

TIP: You can always contact KiSP Support for a copy of the correctly formatted spreadsheet with all the fields that can be updated.

Inventory_Upluad [Read-Only] [Compatibility Mode] - Microsoft Excel

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T
	standard	serial no	building	location	condition	quantity	From building	From Location	From Condition	cost center	available for reuse	date available	customer order no	customer order date	userfield 1	userfield 2	userfield 3	userfield 4	userfield 5	userfield 6
1																				
2	TRN001	TRN001	WHSE01	F21J5L	NEW	4														
3	TRN002	TRN002	WHSE01	F02V4L	NEW	8														
4																				
5																				
6																				
7																				
8																				
9																				
10																				
11																				
12																				
13																				
14																				

Get the spreadsheet template from KiSP Support!

File Home Insert Page Layout Formulas Data Review View

Clipboard: Cut, Copy, Paste, Format Painter

Font: Calibri, 11, Bold, Italic, Underline, Text Color, Background Color

Alignment: Wrap Text, Merge & Center

	A	B	C	D	E	F
1	standard	serial no	building	location	condition	quantity
2	TAS0001	17130000	WHSE01	A0110	Good	
3	TAS0001	17130001	WHSE01	B0410	Fair	
4	TAS0001	17130002	WHSE01	B0420	Repair	
5	TAS0001	17130003	WHSE01	C0230	Good	
6	TAS0001	17130004	WHSE01	D0110	Good	
7	TIL0001	TIL0001	WHSE01	E0110	Good	25
8	BAS0001	BAS0001	WHSE01	B0320	Fair	9
9	ACC0001	ACC0001	WHSE01	A0110	Good	11
10						
11						
12						
13						
14						
15						
16						
17						
18						
19						
20						

Sheet1 Sheet2 Sheet3

Ready

Enter the data - must fill out the 6 mandatory fields.



Demo - Microsoft Excel

File Home Insert Page Layout Formulas Data Review View

Clipboard: Cut, Copy, Paste, Format Painter

Font: Calibri, 11, Bold, Italic, Underline, Text Color, Background Color

Alignment: Wrap Text, Merge & Center

Number: Text, \$, %, .00, .00

Conditional Formatting: Normal, Bad, Good, Neutral, Calculation, Check

	A	B	C	D	E	F
1	standard	serial no	building	location	condition	quantity
2	TAS0001	17130000	WHSE01	A0110	Good	
3	TAS0001	17130001	WHSE01	B0410	Fair	
4	TAS0001	17130002	WHSE01	B0420	Repair	
5	TAS0001	17130003	WHSE01	C0230	Good	
6	TAS0001	17130004	WHSE01	D0110	Good	
7	TIL0001	TIL0001	WHSE01	E0110	Good	25
8	BAS0001	BAS0001	WHSE01	B0320	Fair	9
9	ACC0001	ACC0001	WHSE01	A0110	Good	11
10						
11						
12						
13						
14						
15						
16						
17						
18						
19						
20						

Format Cells

Number Alignment Font Border Fill Protection

Category: General, Number, Currency, Accounting, Date, Time, Percentage, Fraction, Scientific, **Text**, Special, Custom

Sample: standard

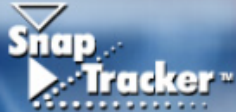
Text format cells are treated as text even when a number is in the cell. The cell is displayed exactly as entered.

OK Cancel

Format cells - text only. Keep it all in Sheet 1.

Sheet1 Sheet2 Sheet3

Upload & Process Batch



Onsite Solutions
Welcome SYSTEM MANAGER

Cart :

Items in Cart :

Sub-Total :

[Go to Cart](#)

Select another cart... ▼

[Request a Service](#)

[Inquiry](#)

[My Account](#)

[Accounting](#)

[Movements](#)

[PDA Processing](#)

[Work Orders](#)

[Reports and Analysis](#)

[Setup](#)

[Utilities](#)

[Export Sif](#)

[Forward Trial Kit](#)

[Maintenance](#)

[System Setup](#)

[User Setup](#)

[Custom Setup](#)

[Email Notifications ...](#)

[File Upload](#)

Utilities

[Home](#) > Utilities

Select a Customer

Z - KSP001 - KiSP Inc ▼

Export Sif

Export Sif allows you to export Standard information including Standard, Options and Finishes and the quantities currently on hand for product.

Forward Trial Kit

Forward Trial Kit is a powerful real-time analysis of product availability for different buildings by exploring common, what-if scenarios associated with upcoming projects. It allows you to analyze your inventory to see if you can build specific stations.

Maintenance

This section provides the ability to change an item from one standard to another, move an entire location content to another location at one time and issue a new serial number for a particular item.

System Setup

The SnapTracker Lite database has a hierarchical setup where Company resides at the top of the hierarchy. Therefore no other setup is allowed until a Company is created. The System Setup menus will allow you to enter Company and Parameter information.

User Setup

User Setup contains the menus related to the setup of users for SnapTracker Lite. This section administers the areas that affect users on the SnapTracker Lite system. It provides administration of Users, Menu Access, Customer Access and Building Access.

Custom Setup

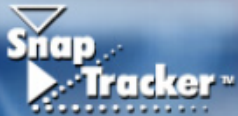
Custom Setup provides an interface allowing you to customize Thank-you messages displayed when a Shopping Cart is checked out and the Email content sent out for different types of orders.

Utilities > File Upload

File Upload

Emails Notifications Setup provides an interface allowing you to setup users to receive emails from SnapTracker when Orders are created.

The File Upload section enables you to update and create Locations and to receive and transfer inventory by uploading an Excel spreadsheet with pre-specified columns.



Onsite Solutions
Welcome SYSTEM MANAGER

Cart :

Items in Cart :

Sub-Total :

[Go to Cart](#)

Select another cart... ▼

[Request a Service](#)

[Inquiry](#)

[My Account](#)

[Accounting](#)

[Movements](#)

[PDA Processing](#)

[Work Orders](#)

[Reports and Analysis](#)

[Setup](#)

Spread Transaction Upload

Select a Customer

Z - KSP001 - KiSP Inc ▼

[Home](#) > [Utilities](#) > [File Upload](#)

Transaction Type:

Inventory ▼

Select an Excel File :

Browse...

Upload File

Select "Inventory", choose the file and upload.



Onsite Solutions
Welcome SYSTEM
MANAGER

Cart :
Items in
Cart :
Sub-Total :

Go to Cart

Select another cart... ▼

Request a Service
Inquiry
My Account
Accounting
Movements
PDA Processing
Process Batch
Edit Transaction
Global Batch Edit
Batch Error Report
Batch History
Work Orders
Reports and Analysis
Setup
Utilities

Process Batch

Home > PDA Processing > Process Batch

required fields

Select a Batch No. :

498 ▼

☐ Delete Batch

Enter a Batch No. :

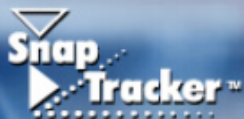
498

Get Record

Processing Status		Process Time
Record Count :	7	Start Time :
Records Processed :	0	Elapsed Time :
Records Failed :	0	
Records Discarded :	0	

Add to Cart - Internet Ex...
http://snaptracker.kisp.com/demo3/Inquiry/PopUpM:
Information
The file has been successfully saved
* Batch No.: 498
* Number of Records: 7
Close

Re-directed to Process Batch screen: a Batch No. is assigned.



Onsite Solutions
Welcome SYSTEM
MANAGER

Cart :
Items in
Cart :
Sub-Total :

[Go to Cart](#)

Select another cart... ▼

Request a Service
Inquiry
My Account
Accounting
Movements
PDA Processing
Process Batch
Edit Transaction
Global Batch Edit
Batch Error Report
Batch History

Process Batch

[Home](#) > [PDA Processing](#) > Process Batch

required fields

Select a Batch No. :

Select One... ▼

☐ Delete Batch

Enter a Batch No. :

498

Get Record

Processing Status		Process Time	
Record Count :	7	Start Time :	8/2/2016 10:04:16 AM
Records Processed :	7	Elapsed Time :	00:00:01
Records Failed :	0		
Records Discarded :	0		

[Reset](#) | [Upload File](#) | [Process](#) | [Show History](#)

Process the data.

Best Practices



Ask KiSP Support for the most up-to-date version of the spreadsheet.



At the bottom of the sheet there are tabs labelled sheet 1, sheet 2, sheet 3; **only sheet 1 can be used.**

(Note: Do not rename Sheet 1 with anything else or the system will reject the upload.)

Summary : Receive Inventory via File Upload

1. Why use the method?

- **Alternative method** of receiving inventory into the database using an Excel worksheet.
- Receiving inventory via file upload is NOT a best practice. **PDA is the optimum way!**

2. How to Set Up a Worksheet?

- Use the **worksheet template** from KiSP Support.
- Must set up **all 6 mandatory fields**.
- Must format sheet properly: **text-only** and in **Sheet 1**.

3. How to Process the data?

- Upload the worksheet in **Utilities > File Upload**.
- Once the file is uploaded, automatically **re-directed to the Process Batch screen**.

4. Best practices

- The **fields must be added exactly**. That means no additional characters or spaces in the fields or the system will reject the transaction.
- **Do not rename Sheet 1** - it's the only way for SnapTracker to process the sheet properly.

Q&A

Did you enjoy today's webinar?
What would you like to see in
future **Webinar Wednesdays**?

Let us know by **filling out the survey** after
this webinar!

The background of the slide is a photograph of a modern office interior. It features a high ceiling with a grid of square acoustic tiles and recessed lighting. Large windows on the left and right sides offer a view of a city skyline. The floor is covered in a pattern of square tiles. A semi-transparent white rectangular box is overlaid on the center of the image, containing the text.

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Email: SnapTrackerKC@kisp.com if you have
any questions, feedback, requests!

**See you at our next
Webinar Wednesday!**