

# **Stock Kit Parts Import Notes**



#### Contents

Protean Versions	3
Description	3
Fields on the Import - expected number of columns = 3:	4
How to import	5
Best Practice	5
Further Assistance	6

#### **Protean Versions**

This document describes the import functionality stock kit parts from Protean 7.3.4033 to Current Latest Release

### Description

This import template is used to create stock kits





### Fields on the Import - expected number of columns = 3:

Column	Field Name	Mandatory	Requirements	Notes	
А	KitPartNo	Always	Required Field	The part number that relates to	
			Text Field	the kit item (once built).	
			50 Characters Max	Must exist in Protean	
В	ComponentPartNo	Always	Required Field	The part number of one of the	
			Text Field	components of the kit (must exist	
			50 Characters Max	in Protean)	
С	Quantity	Always	Required Field	The quantity of the component	
			Numeric Field (Whole Numbers	part to make the kit	

#### How to import

- 1. File must be saved in CSV format.
  - a. File must not contain any header rows.
- 2. Navigate to file tab on Protean
- 3. Select Import Data
- 4. Use the import wizard
- 5. Select 'Stock Kit Parts' under the type of data dropdown
- 6. Find the CVS import file (as per step 1)
- 7. Hit Next to validate the data
  - a. If needed correct import file
- 8. If step (7) successful Double check the data on screen
- 9. Hit next to import into Protean
  - a. If needed review any warning messages and either correct in Protean / Import file and revert to step (2) onwards
- 10. If successful choose to keep or delete the import file used

### **Best Practice**

- If using Excel do not double click to open a CSV File.
- Open Excel and use a data import from text to open any CSV
  - $\circ$   $\;$  Select text formatting for any data including leading zeros
- Once ready, save in CSV format including the header rows
- Review the saved CSV file in raw text format
- Remove the header row from the raw text CSV save as another name with .csv formatting
- Run any major import in a practice environment before live
- Carry out a sample import of under 10 records before any larger import

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#### Further Assistance

Example CSV template available on support website

Please review import templates webinar - <a href="https://support.proteansoftware.co.uk/knowledge-base/webinar-import-templates/">https://support.proteansoftware.co.uk/knowledge-base/webinar-import-templates/</a>

Contact Protean Support



#### Version Control

Version	Comments	User	Date	Approver
1.0	Original Document	Glen Barber	29/05/2019	MH