Parts Levels Import Notes

Part Levels Import

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Part Levels Import

Protean Versions

This document describes the import functionality for Parts Levels from Protean 7.3.4033 to Current Latest Release

Description

This import template is used to **Update** Existing Parts Levels records in Protean.

This import **cannot** be used to update parts levels for **serialised numbered parts** in Protean.

Part Levels Import

Fields on the Import - expected number of columns = 9:

Column	Field Name	Mandatory	Requirements	Notes
A	PartNo	Always	Required Field Text Maximum 50 characters	Protean Part number. **Note** do **not** enter a part number flagged as **serial numbered**.
B	Quantity	Always	Required Numeric can be 0	This is the quantity in stock at the named store at this time
C	StockState	Always	N=New R=Refurb U=Used	
D	Store	Always	Required	The name of the store that the line stock min and max levels is related to
E	Cost	Always	Required - Can be 0	This is the cost from the preferred supplier per stock unit. Not the pack price for purchase (if used)
F	Allocated	Always	Numeric required – can be 0	Set to 0 if updating new system. But if updating system in use make sure the figure here represents the quantity of that part allocated currently from the store in question
G	Bin Location	No	Text – Can be left blank	Maximum 50 characters
H	Min Level	Always	Required Numeric - Can be 0	Minimum required stock level for the relevant store
I	Max Level	Always	Required Numeric - Can be 0	Maximum required stock level for the relevant store

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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 'Parts Stock Levels' 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
    o 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

Other Info

This import is available in XML format.

Regular scheduling of this import is possible via the Protean scheduler.

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Further Assistance

Example CSV template available on support website

Please review import templates webinar - https://support.proteansoftware.co.uk/knowledge-base/webinar-import-templates/

Contact Protean Support

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Version Control

Version	Comments	User	Date	Approver
1.0	Original Document	Glen Barber	08/02/2019	MH
1.1	Note on Serial Numbers Parts	Matt Hayden	13/03/2020	MH