



online service network

User Manual: Stock Import Data
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Import Templates

There are two import templates that are required to be completed for the import, the columns within both templates are split into three main sections, mandatory fields, optional fields and an import error fields. The import error column should always be left blank and is used when r2c staff carry out the import process.

Supplier Catalogue

The first of the two import templates is the 'Supplier Catalogue', you are required to fill out one of these for each of your suppliers, potentially resulting in multiple sheets. These sheets should then be saved as the suppliers name, this step is imperative to the import process.

Mandatory fields - Columns A to G.

	A	B	C	D	E	F	G	
1								
2	PartCategory should be a valid part category, e.g. Body, Chassis etc, this needs to exclude the 'code' part of the part category	Max 50 Characters (mandatory)	Max 200 Characters (mandatory)	If "1" use Each. If >1 use "Pack", "Box", "Bag", "Pallet", "Litre", "Gallon" or "Metre" (mandatory)		Please enter the price that you pay to purchase the part (mandatory)	This is the unit sales price. If the item you purchase has a qty and unit greater than "1" and "Each" then divide the cost by the quantity to give an individual sales price. (mandatory)	Use " or "Ze (or
3								
4	PartCategory	PartNumber	PartDescription	QTY	Unit	CostPrice	RRP	VATb
5								
6								
7								
8								

Column A — Part Category

The part categories can assist when viewing the stock page in portal i.e. grouping for stock taking or filtering for total category values. Not all of the categories are required to be used and these can be updated once in portal.

When entering the category from the list, only enter the text and not the code i.e. 'Fuel System' should not include the code '(FS)', it should also consist of the full name and not a partial, such as 'Fuel'.

Only categories from the approved list will be accepted, for the up to date list please refer to the portal or contact r2c customer support.

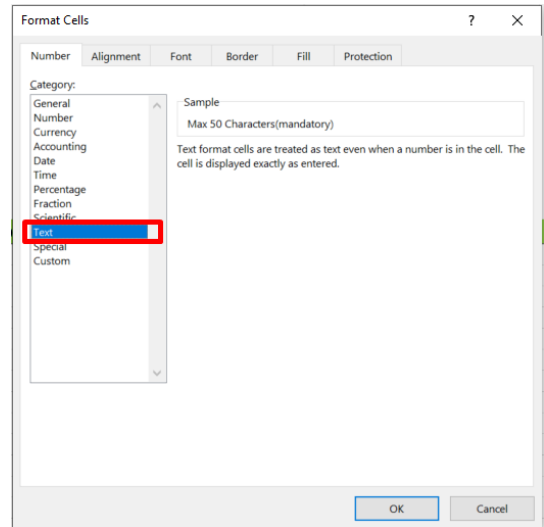
- Please Select

 - Air Intake & Exhaust System (AIE)
 - Ancillary Equipment (AE)
 - Body (BDY)
 - Cab (CAB)
 - Chassis (CHS)
 - Consumables (CNS)
 - Electrical System (ES)
 - Fuel System (FS)
 - Heating and Cooling (HAC)
 - Instruments & Gauges (IGS)
 - Miscellaneous (001)
 - Miscellaneous ()
 - Primary Engine (E)

Column B & C— Part Number & Part Description

Part numbers and descriptions should be as per the supplier’s data, these columns can be copied and pasted from existing spread sheets.

Column B does not accept leading zero’s i.e. 012345 due to formatting. If leading zero’s are required then the column should first be re-formatted to text. This can be achieved by; right clicking on the column header followed by ‘Format Cells’. The ‘Text’ category can then be selected.



Column D & E — QTY & Unit

If the minimum quantity, when ordered, is more than 1 then ‘Each’ should not be used

i.e. if a bag of items are purchased and the bag contains 50 pieces then it should be entered as per the example. When a single item from the bag is placed on a jobsheet the quantity will drop to 49.

The ‘Unit’ field must exactly match one of the categories;

Each - Pack - Box - Bag - Pallet - Litre - Gallon - Metre

QTY	Unit
1	Each
50	Bag
100	Gallon

Column G & H — Cost Price & RRP

The cost price, as with the part number and description, should be as per the supplier’s data and can therefore be copied and pasted in.

The RRP is the retail price of the part to be added to the jobsheet for invoicing (i2i dependant). The quantity per unit should also be considered if the unit is anything other than each.

i.e. If a bag of 50 items cost £50, the retail price per item would be a division of the cost, plus any markup, in this case a markup of 10% = £1.10.

QTY	Unit	CostPrice	RRP
1	Each	7	7.7
50	Bag	50	1.1
100	Gallon		

Supplier Catalogue—Continued

Optional Fields - Columns H to Q

The optional fields are provided for information purposes only and do not have any additional digital function. This information can be viewed on the part record.

H	I	J	K	L	M	N	O	P	Q	
Use "Standard" or "Zero-Rated" (optional)	(optional)	(optional)	(optional)	(optional)	Valid values are "Year", "Month", "Week", "Day" (optional)	(optional)	Valid values are "Year", "Month", "Week", "Day" (optional)	Valid values are "Yes", "No" (optional)	To discontinue a part or remove it from being discontinued, "Yes" = Discontinued, "No" = Not discontinued (optional)	W a
VATband	Order Discount %	HSE Code	Surcharge	Shelf Life	Shelf Life Unit	Warranty	Warranty Unit	OEM	Discontinued	En

Once Imported

The supplier catalogue provides the 'Part Details' section of the part record. The mandatory fields are denoted by an Asterix.

Note: The only fields of a part record that cannot be amended is the 'Supplier' and 'Part Number'.

UATWs - UAT003 (Windscreen wiper)
SUPERCEDES:

IN STOCK
4

ON ORDER
0

STOCK VALUE
£39.96

AVAILABLE ELSEWHERE
0
VIEW

TOTAL RESERVED
0
VIEW

Part Details
Owned Stock
Impress Stock
Customer Stock
Reservations
Movements
Available Elsewhere
UAT Supplier

Supplier*

Part Number*

Description*

Category*

Cost Before Discount (£)*

Order Discount %

Unit Selling Price (£)*

HSE Code

Discontinued Part

Order Quantity*

Surcharge (£)

Shelf Life

Warranty

OEM

VAT Band*

SAVE AND CLOSE
CLOSE

Stock Import Template

The 'Stock' template is a combined stock take of all parts held irrelevant of the supplier, there should only be one version of a 'Stock' import.

Mandatory fields - Columns A to E.

	A	B	C	D	E	
1						
2						
3	Max 50 Characters (mandatory)	Add the name of the supplier the item was and will be purchased from. (Use "Other" if the part is from your Own Catalogue). (mandatory)	Use "Owned", "Impress" or "Customer" (mandatory)	Add the unit quantity you want to add to the system. If you purchase a box, please add the quantity of individual items to be added to your Stock. (mandatory)	Add the cost price per unit (mandatory)	Ma Thi of
4						
5	PartNumber	Supplier	Stock Type	Stock Quantity to Import	Stock Unit Price	Lo
6						
7						

Column A & B — Part Number & Supplier

Part numbers and the suppliers names can be taken directly from the supplier catalogue sheets, it's these two fields of information that will link the stock take to the supplier and ultimately the part record.

It is possible to have the same part supplied by different suppliers although additional care will be needed when adding the correct part to a jobsheet.

PartNumber	Supplier
123456	Supplier A
123456	Supplier B

Column C — Stock Type

The stock type directly represents the business process of acquiring stock.

Although it is possible to have the same part that is 'Owned' stock and 'Impress' stock, this would normally be when transitioning from one stock type to another.

PartNumber	Supplier	Stock Type
123456	Supplier A	Owned
123456	Supplier A	Impress

Stock Import Template—Continued.

Column D — Stock Quantity to Import

The stock to import should reflect stock on hand as a result of a stock take, quantities should be per item irrelevant of 'Bag', 'Pack' etc.

Column E — Stock Unit Price

These prices should reflect the individual cost of the parts on hand and will display as the part's total stock value.

Optional Fields - Columns F to I

The optional fields on the Stock Template, unlike the Supplier Catalogue, do have digital functionality and will assist in the overall management of stock.

Column F — Location

The location field will assist when grouping or filtering when stock taking, as 'Location' exists in table components on the stock page.

Column G — Default Order Quantity

The default order quantity is automatically set on the order but this can be overridden.

Column H & I — Minimum & Maximum Quantity

The minimum quantity set against a part will be monitored and highlighted in the stock page KPI filter once triggered. This can then be actioned against to maintain quantities.

The maximum quantity is also monitored but will only flag as a warning to the user when attempting to order above this amount. Where needed the warning can be overridden.