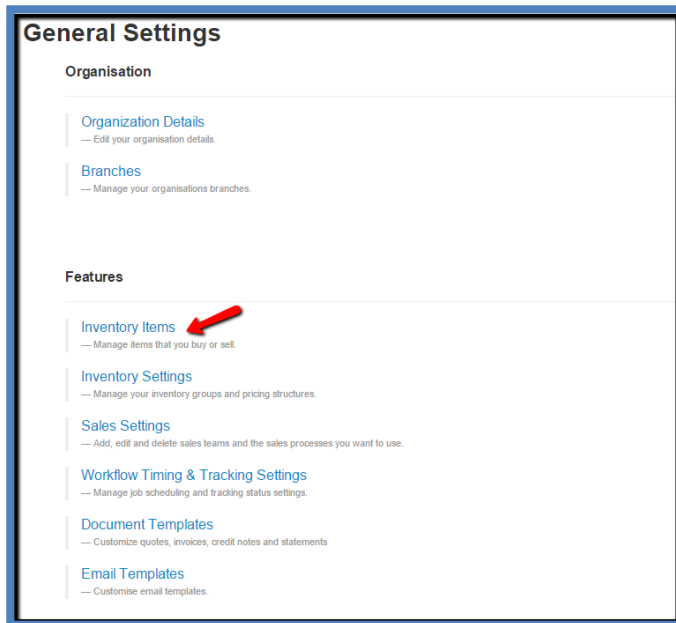# BUZ Inventory Items

Adding and Editing Inventory Items for

Purchasing a Part or Material

Inventory Items are used to manage items purchased, allowing you to keep track of your stock and purchase orders.

In this webinar we will explain how to set this up. You will find information on Inventory items in our help documentation
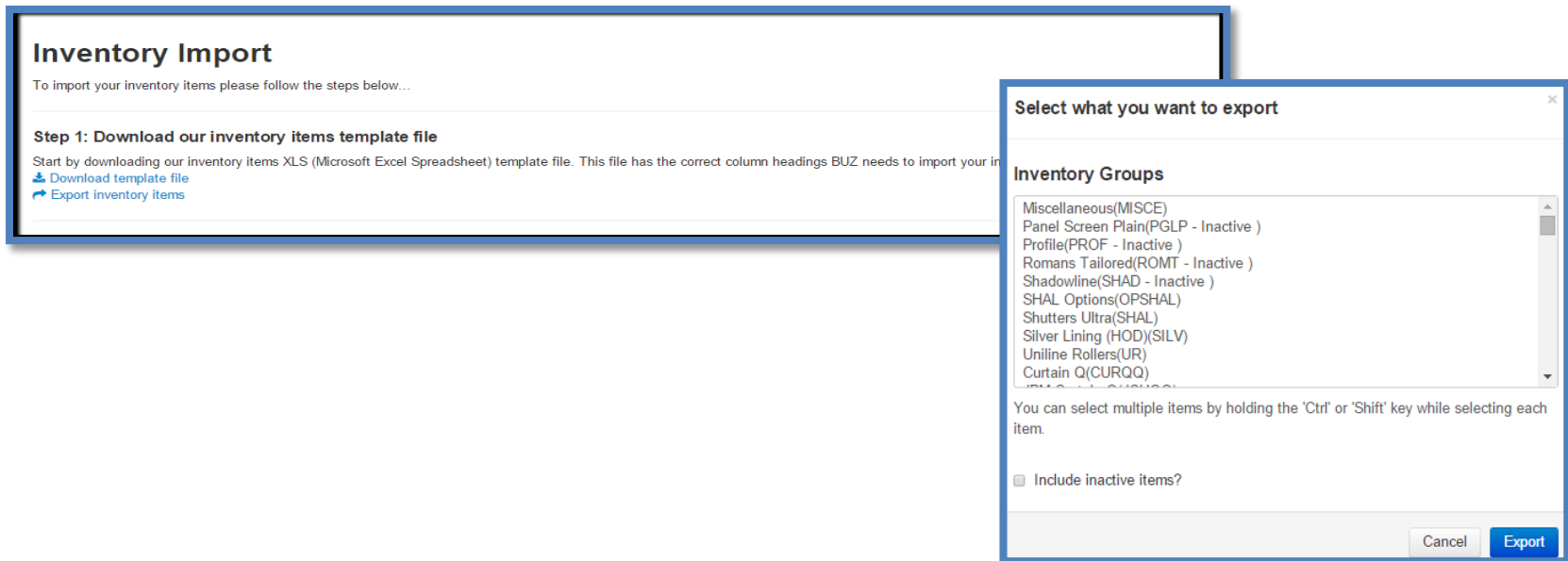
Purchase -
https://buzsoftware.atlassian.net/wiki/display/HELP/Purchase+Orders#PurchaseOrders-Step2:ImportInventoryItems

Adding Inventory Items

To enter in the Inventory items for selling and purchasing is the same process but not always the same information is required for each one.

Step 1: Download our inventory items template file

- Select Export Inventory Items
- A pop up will appear for you to select the Group or Groups you wish to download (if you do not have any inventory items in the group it will download a blank spreadsheet ready for you to add in your information)

Inventory Import

To import your inventory items please follow the steps below...

Step 1: Download our inventory items template file

Start by downloading our inventory items XLS (Microsoft Excel Spreadsheet) template file. This file has the correct column headings BUZ needs to import your in

⬇ Download template file
➡ Export inventory items

Select what you want to export ✕

Inventory Groups

Miscellaneous(MISCE)
Panel Screen Plain(PGLP - Inactive)
Profile(PROF - Inactive)
Romans Tailored(ROMT - Inactive)
Shadowline(SHAD - Inactive)
SHAL Options(OPSHAL)
Shutters Ultra(SHAL)
Silver Lining (HOD)(SILV)
Uniline Rollers(UR)
Curtain Q(CURQQ)

You can select multiple items by holding the 'Ctrl' or 'Shift' key while selecting each item.

☐ Include inactive items?

Cancel   Export

Adding Inventory Items

Step 2: Copy your inventory items into the template

Using Excel or another spreadsheet editor, fill the BUZ spreadsheet with your inventory items data

Copy your inventory items into the template

The values can then be edited in the spreadsheet. Columns can not be added or removed and if they are BUZ will error upon you trying to upload

The **PkId** is the Primary Unique Identifier for the row in the database so this should not be changed or deleted and do not copy this when duplicating the row to create a new item. The **PkId** must be blank when Operation = A and contain the exported value for Operation = E or D

- When adding in a new Item the Operation column must have an "A" in it for Add
- When Editing an item the Operation column must have an "E" in it for Edit
- When making an item Inactive the Operation column you must have a "D" in it to Deactivate

PkId
6620167a-80c5-45e9-b668-d6353a265e39
2fb4c80d-a17f-4031-aacb-425cdbba065d
f2e03196-9bc3-4988-9328-a34da53e01ef
02da4a87-a40f-4d98-a16e-e321e94980cb
621fcef6-2a18-4452-8d1d-d2cbf31981bd
5558de3e-3f94-4c25-8961-b079a8ee0a04
187c3146-0f8d-4550-91cf-5b0b13b2e659
0656cce0-6b2f-44d4-ab87-a9b4b61e1ea2
ee62ffb9-3e28-404d-863d-8e9ca40e7bc7

Active	Last Edit Date	Operation
		A
		A
TRUE	10/04/2017	D
TRUE	11/04/2017	E
		A

Adding Inventory Items

Before the import can be done all **referenced data** such as **Suppliers** need to have been imported. For details on importing this data refer to Inventory Settings

Code & Description

- For items that are made up of Material, Material Type and Colour
  the **Code** and **Description** are automatically created using a concatenation of the their descriptions
- For Items that are NOT made up of any Material, Material Type or Colour you must add in the **Code** and **Description**

Yellow areas can be added in if you need Material , Type, Colour

PkId	Code*	Description*	DescnPart1 (Material)	DescnPart2 (Material Types)	DescnPart3 (Colour)
ae18f2bb-b683-4cfa-a542-2a35c34d2881	RL5AVBOAVCD	RL 5Th Avenue Blockout Avocado	5Th Avenue	Blockout	Avocado
04964a49-4ff5-497e-9135-e936324a1b91	RL5AVBOB13	RL 5Th Avenue Blockout Bluestone	5Th Avenue	Blockout	Bluestone
05b8c14f-b3f3-4f55-84eb-5f3af9118ceb	RL5AVBOBLNC	RL 5Th Avenue Blockout Blanc	5Th Avenue	Blockout	Blanc
			5Th Avenue	Blockout	Bossanova
			5Th Avenue	Blockout	Cappuccino
			5Th Avenue	Blockout	Dove
			5Th Avenue	Blockout	Espresso
			5Th Avenue	Blockout	Moonstone

Yellow areas need be added in if there are no Material, Type of Colour

PkId	Code	Description	DescnPart1 (Material)	DescnPart2 (Material Types)	DescnPart3 (Colour)	Price Grid Code	Cost Grid Code
93e0c54a-fea7-49b7-9bd1-a459eb4e3a37	OPCHAIN	Chain					
f0869ecc-d450-4fb3-9243-76c92e987b82	OPROLLMOTOR	Somfy Motor					
	OPSIDECH	Side Channel					
	OPCASSHB	Cassette Headbox					
	OPDUALBRK	Dual Bracket					
	OPLINKBRK	Link Bracket					

Purchasing - Adding Inventory Items

Other areas that need to be added if the Inventory item is used for Purchasing are highlighted below in Yellow and will be explained on the next page

	A	B	C	J	K	L	M	N	O	P	Q	R
Panel Glide Components - 18/04/2017												
	PkId	Code	Description	Last Purchase Price	Standard Cost	Tax Rate	Units Purchase	Min Qty	Max Qty	Reorder Multiplier	ForeX Code	Last Purchase ForeX
	5558de3e-3f94-4c25-8961-b079a8ee0a04	CPPGPT3CHWH	3 TRACK PANEL - 5.5M LENGTH WHITE	22.5	21.6	GST	LG	5500	22000	11000		15.3

	S	T	U	V	W	X	Y	Z	AA	AB	AC
	Purchasing Lead Days	Stocking Multiplier	Units Stock	Selling Multiplier	Units Sell	Cost Method	Product Size	Product Type	Supplier	Supplier Product Code	Supplier Product Description
	10	11000	MM	1	MM	A	0	C	BLINDW	TRK3WH	Blindware 3 Trk 2x5.5m

Purchasing - Adding Inventory Items

Explanation of each highlighted column from previous page

Field	Details
Code	Your Code for the item
Description	Item Description
Last Purchase Price	The price you last purchased it for
Standard Cost	The suppliers normal sell price
Tax Rate	Your tax rate
Units Purchase	What unit do you purchase in IE: BX is Box (These units of measure can be edited in inventory settings Purchase Orders)
Min Quantity	The Min Qty you need to keep on hand
Max Quantity	Max Qty to keep on hand
Re Order Multiplier	In terms of the stocking unit how many multiples are required to re order as (E.g controls come in packs of 10 so you have to order 10 or 20 not 15)
ForeX Code	Code used for ForeX
Last Purchased ForeX	The price you last purchased it for in ForeX
Purchasing Lead Days	lead time for stock to be received
Stocking Multiplier	Multiple "Unit Stock" by "Units purchased"
Units Stock	What unit do you stock in IE: BX is Box
Selling Multiplier	
Units Sell	What unit do you sell in IE: BX is Box
Cost Method	What cost do you want to default to (Average, Standard, Last purchased)
Product Size	
Product Type	Component, Serivce, Manufactured
Supplier	Enter you Supplier here
Supplier Product Code	Enter the Code your Supplier provides you for the item
Supplier Product Description	Suppliers Description of goods
Operation	**If this is a new item then the operation is A, E is to edit and existing item and D in to Deactivate**

Editing Inventory Items

Step 3: Upload an excel document
Choose the "edited" excel document to import and then upload it to server

Step 4: Import the updated inventory items file

Editing Inventory Items

Step 1: Export your inventory items file
Start by downloading your inventory items spreadsheet. Download the product you wish to edit

Step 2: Edit your inventory items file
Edit your items and put in the operation column an *E=(Edit item) or D=(Set item Inactive)* of the items you wish the edit.
NB: If you are changing the price we recommend you deactivate the item and add another item with the new price. This is to avoid any orders in the system with this inventory item changing to the new price.

Step 3: Upload an excel document
Choose the "edited" excel document to import and then upload it to server

Step 4: Import the updated inventory items file

Editing Inventory Items

If you want to edit 1 item you don't necessarily have to download the excel file.

Settings -> Inventory Items

You can select the item you wish to edit, From here you can make your changes and save.

If you cant find what your looking for in the help documentation let us know!

We will point you in the right direction or get something added to the documentation for you.

Email: support@buzsoftware.com.au

Thank you

Any further questions please contact us at
support@buzsoftware.com.au