

A decorative background image showing a sunset or sunrise with a warm orange and yellow sky, white clouds, and a white silhouette of a cloud line at the bottom.

BUZ Inventory Items

Adding Inventory Items

Inventory Items are used to manage product items, giving you the ability to add pricing and costing.

In this webinar we will explain how to set this up. You can also find information on Inventory items in our help documentation.

[Inventory Items](#)

General Settings

Organisation

Organization Details

— Edit your organisation details.

Branches

— Manage your organisations branches.

Features

Inventory Items

— Manage items that you buy or sell.

Inventory Settings

— Manage your inventory groups and pricing structures.

Sales Settings

— Add, edit and delete sales teams and the sales processes you want to use.

Workflow Timing & Tracking Settings

— Manage job scheduling and tracking status settings.

Document Templates

— Customize quotes, invoices, credit notes and statements

Email Templates

— Customise email templates.

Adding Inventory Items

Entering New Inventory items

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 inventory item data.

[Download template file](#)

[Export inventory items](#)

Step 1: Download inventory items template file

Go to -> Settings -> Inventory Items -> Import/Export -> Export Inventory Items -> Select required Inventory Group -> Export -> Open Excel

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).

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.

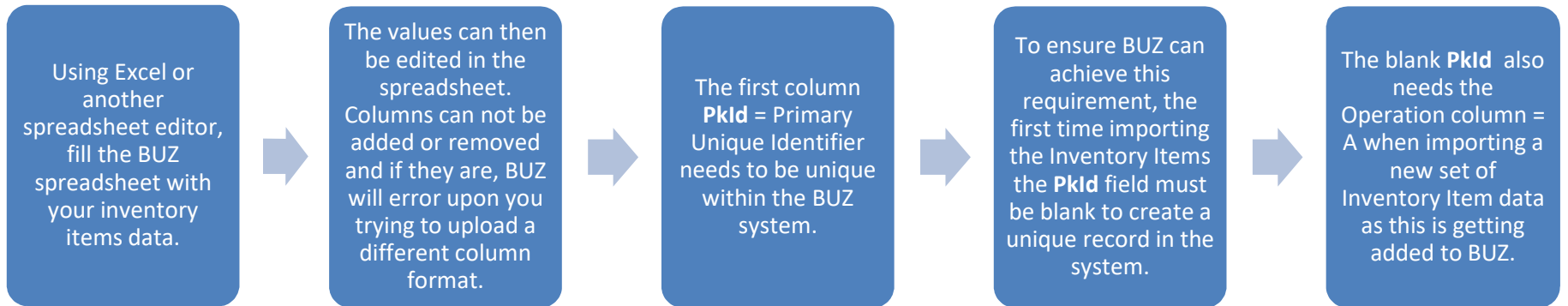
Include inactive items?

Cancel

Export

Adding Inventory Items

Step 2: Copy your inventory items into the template



PkId	Code*	Description*

Active	Last Edit Date	Operation
		A
		A

Adding Inventory Items

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

Code & Description

- Some items, which are made up of Material, Material Type and Colour can have the **Code** and **Description** automatically created using a concatenation (linking together) of the their descriptions.
- Items may have different descriptions if they are not curtains or blinds eg: Doors, you still can use these fields Descn1, Descn2 & Descn3 to automatically create the **Code** and **Description**.
- Yellow areas can be added in if you need Material , Type, Colour, Price Grids, Cost Grids and Discount Groups.
- For Optional Component or extra Items that don't require Descn1, Descn2 & Descn3 then you must add in the **Code** and **Description**.
- Yellow areas need be added in if there are no Material, Type of Colour.

Pkld	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					

Updating Inventory Items

Deactive the existing items and upload the new Inventory Items

Step 1 : Export existing Inventory Items

Inventory Import

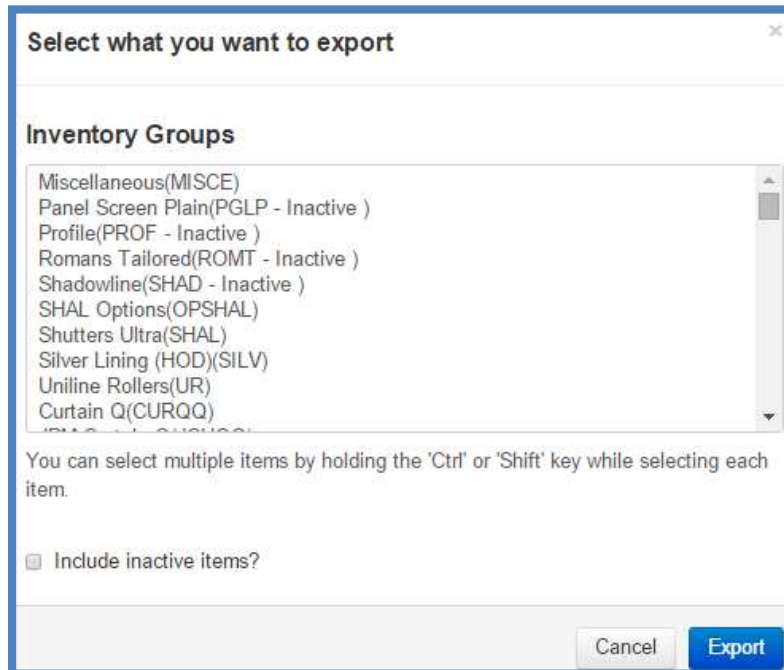
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[Export inventory items](#)



Select what you want to export

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- 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

Download the product you wish to edit.

Go to -> Settings -> Inventory Items -> Import/Export -> Export Inventory Items ->

Select required Inventory Group -> Export -> Open Excel

Updating Inventory Items

Step 2: Save a copy of the Inventory Item file

To ensure you have a backup of the existing data in the system save a copy of the downloaded file before any changes are made.

Step 3: Edit your inventory items file

Edit your items. The **PkId** = Primary Unique Identifier column will already be populated with the unique identifier BUZ has already allocated.

Add the product details to be updated and save the excel document to a new file name.

Last Edit Date = Enter the date you want the Inventory Items to be active, this can be backdated or forward dated appearing in the system when required.

Operation must be populated with D = 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

Updating Inventory Items

Step 4: Upload an excel document & Import

Select the “updated” excel document to import and then upload it to BUZ

Highlight the worksheet to upload
->Import

Step 3: Upload an excel document

Choose an excel document to import and then upload it to server

Select file 20180912.1553_InventoryItems_BUZ_demo.xlsx

Upload

IMPORTANT

Upload does not save any data until the next step.

Step 4: Import the updated inventory items file

Choose sheet names and an excel document to import and then upload it to server

Note: Please select maximum 4 Sheets at a time.

Sheet list:

AD Fabrics(ADFAB)

IMPORTANT

It may take several minutes to upload and process the file depending on the size of the file

Import

Updating Inventory Items

Inventory Import

Step 4: Confirm import

Step 5: Save All the Inventory Items

IMPORTANT

It may take several minutes to process the file depending on the size of the file and how many items need to be processed.

Inventory Group Description	Status	Adding	Updating	Error	Total
AD Fabrics (ADFAB)	OK		73	0	73

Save All Cancel

Import Successful! 73 item(s) added and 0 item(s) modified.

Inventory Import

Step 4: Confirm import

IMPORTANT

It may take several minutes to process the file depending on the size of the file and how many items need to be processed.

Inventory Group Description	Status	Adding	Updating	Error	Total
AD Fabrics (ADFAB)	OK		73	0	73

Save All Cancel

This screen will advise if there is any issues creating the records in BUZ please refer to:

[Inventory Items Import Error](#)

You can now search for these items in BUZ

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



A decorative background image showing a sunset or sunrise with a warm orange and yellow sky, white clouds, and a white horizon line.

Thank you

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