



**Update and Create Part Masters with Excel**  
Import through Excel to Update, Create, or Update and Create

Software Development  
RIMSS Business Systems Technology

Company Confidential  
Copyright ©1983-2020 RIMSS Business Systems Technology

This Document contains information proprietary to RIMSS Business Systems Technology. Use or disclosure without written permission is expressly forbidden.



To update parts, I will export the parts from RIMSS with the columns in the order that I want. The descriptions do not exactly match the import descriptions, but I can easily copy and paste this information into my import spreadsheet that I have prepared.

Spreadsheet Headers prepared for my import

Item Number	Price Book	Oem Vendor	Oem Division	Description	User Description	Primary Bin	Cost	Core Charge	List Trade	Package Multiple	UDF2	Category	Group	Class	UPC	SKU	Secondary Identifier
-------------	------------	------------	--------------	-------------	------------------	-------------	------	-------------	------------	------------------	------	----------	-------	-------	-----	-----	----------------------

WinNetStar | Telephony | Inventory Master List | Parts User Defined Fields

New Refresh Print Layouts Bin Labels Manual Entry User Reports

Price Book: MAN-BRA | Item Number: [ ] | Fetch

Group: [ ] | Class: [ ] | Exact

I export my fields from RIMSS with the required columns on the left (for updating parts)  
 For Creating Parts, I just copy the information from the information I have provided by the manufacturer or seller.

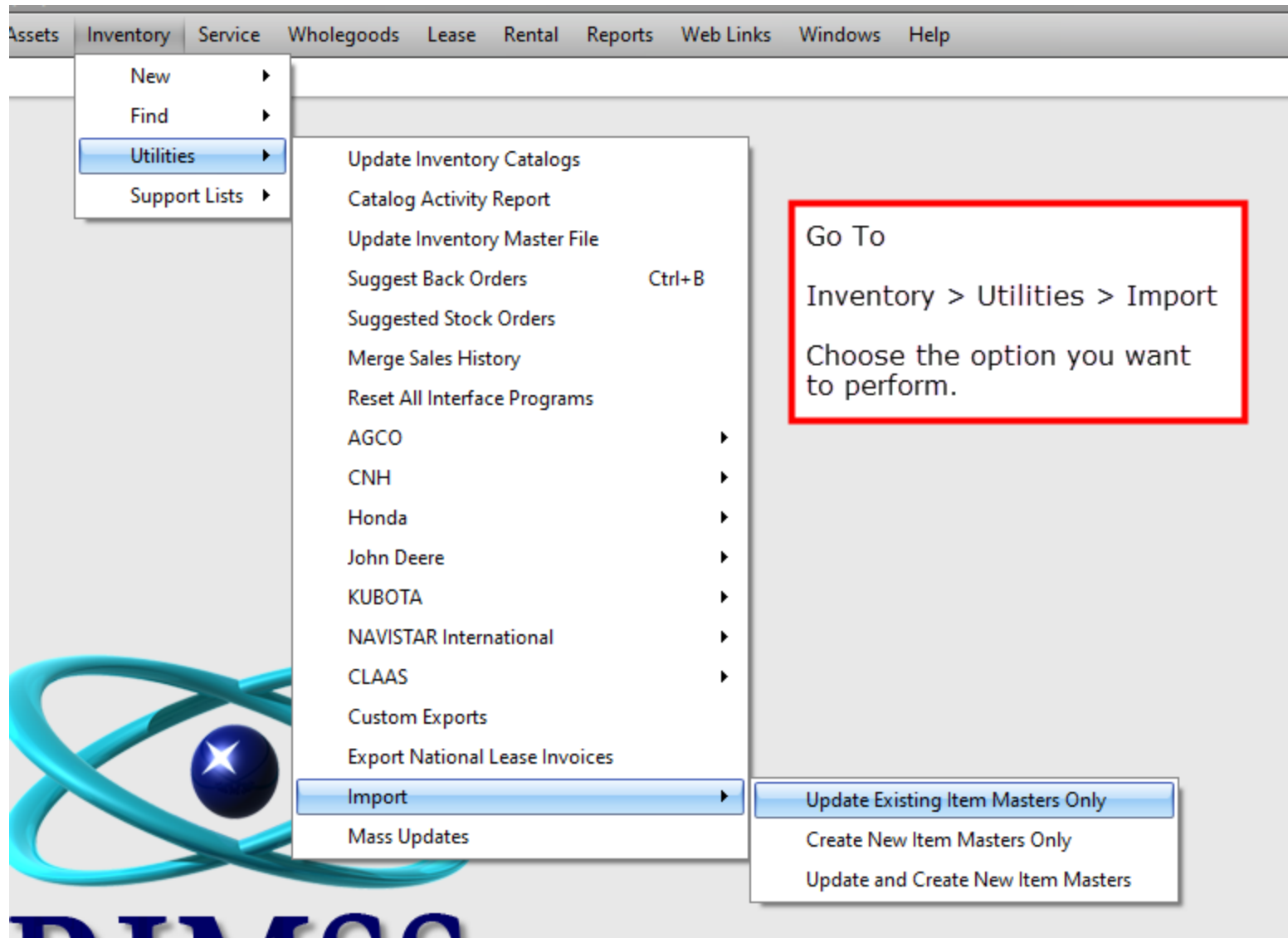
Location System ID	Item Number	Price Book	Oem Vendor	Oem Division	Description	User Description	Primary Bin	Mfg Cost	Mfg Core	Mfg List	Mfg Trade	Package Multiple	PartCustomField2	Category	Group	Class	UPC	SKU
43089	117191	MAN-BRA	BRA		SKID SHOE WEAR PLATE	SKID SHOE...		\$58.00	\$0.00	\$82.85	\$0.00	1.0						
43090	117193	MAN-BRA	BRA		CARBIDE TOOTH KIT	CARBIDE T...	A-11-C	\$319.72	\$0.00	\$443.70	\$0.00	1.0						
43091	117194	MAN-BRA	BRA		BLADE SET BRADCO GROUND SH...	BLADE SET ...	A-11-C	\$624.80	\$0.00	\$779.11	\$0.00	1.0						
43479	1790	MAN-BRA	BRA		FLANGE LOCK NUT	FLANGE LO...	A-9-C	\$1.00	\$0.00	\$1.45	\$0.00	1.0						
43487	1872	MAN-BRA	BRA		PLOW BOLT	PLOW BOLT	A-9-C	\$1.00	\$0.00	\$1.45	\$0.00	1.0						

I click Print on my Parts List and export to an XSLX format for editing in excel.

The screenshot shows a software interface with a parts list table and an 'Export To' menu. The table has columns for various attributes like Location, Item Number, Price Book, Oem Vendor, Oem Division, Description, User Description, Primary Bin, Mfg Cost, Mfg Core, Mfg List, Mfg Trade, Package Multiple, PartCustomField2, Category, Group, Class, UPC, and SKU. The 'Export To' menu is open, showing options like PDF File, HTML File, MHT File, RTF File, DOCX File, XLS File, XLSX File, and CSV File. The 'XLSX File' option is highlighted with a red box, and a red arrow points to it from a text box that says 'I click Print on my Parts List and export to an XSLX format for editing in excel.'



Now I am ready to import the spreadsheet to update and/or create the parts. In this example I am updating existing item masters only. If you are not sure if all parts exist, you can choose to “Update and Create New Item Masters” and the system will determine which process to perform on each part line in your spreadsheet automatically.



You will get the pop-up below to “Import Data”.

1. Click Select File to Import  
2. Navigate to the file you created for import and select it.  
3. Click Open at the bottom of the pop-up.

File Name:   
Sheet Name:   
Data Rows imported:

File name:

Select...	Associations	Inactive	Has Assoc
<input type="checkbox"/>	<input type="checkbox"/>	False	
<input type="checkbox"/>	<input type="checkbox"/>	False	
<input type="checkbox"/>	<input type="checkbox"/>	False	
<input type="checkbox"/>	<input type="checkbox"/>	False	
<input type="checkbox"/>	<input type="checkbox"/>	False	



Now you are ready to review the data, calculate changes that will be made, review variances, and determine if there are any exceptions or issues with the updates being imported. You can print this grid for the review if you prefer reviewing in Excel.

RIMSS WinNetStar | Telephone | Inventory Master List | Parts User Defined Fields | **Update and Create New Item Masters**

Import Details  
 Item Masters To Be Updated: 10  
 Data Fields To Be Updated: 60  
 New Item Masters To Be Created: 0  
 Exceptions: 0

WARNING!!

This process uses the Price Book Defaults or the Location Defaults to set the values for Accounting Source, Pricing Source, Stocking Source and Stock Class for any newly created Item Masters. Please ensure that these values are set correctly before proceeding. Price Book Defaults are found by navigating to Company>Location Support Lists>Price Book Defaults.

Important message about defaults used when creating New Item Masters with this process.

Drag a column header here to group by that column

Ignore	New Item	Updates	Processed	Exception	Exception ...	Item Number	Price Book	OEM Vendor	OEM Division	Item Descri...	User Descri...	Primary Bin	Cost	Core Charge	List	Trade	Special 1	Special 2	Special 3	Weight	Package M...	Units In Cost	Cost Variance	Core Variano
<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	117191	MAN-BRA	BRA		SKID SHOE...	SKID SHOE...	C-14	62.00	0	98.00	91.00	0	0	0	0	1	0	6.90%	0.00%
<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	117193	MAN-BRA	BRA		CARBIDE T...	CARBIDE T...	C-14	420.00	0	465.00	450.00	0	0	0	0	1	0	31.36%	0.00%
<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	117194	MAN-BRA	BRA		BLADE SET ...	BLADE SET ...	C-15	675.00	0	815.00	800.00	0	0	0	1	0	8.03%	0.00%	
<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	1790	MAN-BRA	BRA		FLANGE LO...	FLANGE LO...	C-15	2.50	0	3.25	3.00	0	0	0	5	0	150.00%	0.00%	
<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	1872	MAN-BRA	BRA		PLOW BOLT	PLOW BOLT	Showroom	2.50	0	3.25	3.00	0	0	0	5	0	150.00%	0.00%	
<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	117191	MAN-BRA	BRA					0	0	0	0	0	0	0	0	0	0	0.00%	0.00%
<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	117193	MAN-BRA	BRA					0	0	0	0	0	0	0	0	0	0	0.00%	0.00%
<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	117194	MAN-BRA	BRA					0	0	0	0	0	0	0	0	0	0	0.00%	0.00%
<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	1790	MAN-BRA	BRA					0	0	0	0	0	0	0	0	0	0	0.00%	0.00%
<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	1872	MAN-BRA	BRA					0	0	0	0	0	0	0	0	0	0	0.00%	0.00%

Once the data is transferred to this document, the system will indicate which rows are New, Updates, or have an Exception. Exceptions will not be updated. The system will give a message regarding the type of Exception if one exists. Blank Data Fields or those with 0 will not be updated.

For lines you do not want to update, you can click the selection box in the "Ignore" column on the left.

You can open the Column Chooser to add additional columns to verify any additional information being updated that is not already shown on the screen.

Click on Calculate Changes at the bottom if you want to see additional information about what you are updating in the Variance Columns.

Customization

- Category
- Class
- Current Category
- Current Class
- Current Core
- Current Cost
- Current Description
- Current Group
- Current List
- Current Package Multiple

English (United States) | Client Desktop | User: michellerimss (RIMSS\michelle) | Role: Administrator | Workstation: RIMSS-MICHELE | Server: 2 V3Test | Database: WinNetStarApp | Portal: .NET Remoting



Click the correct option at the bottom of the screen to import the changes to the system. If you choose “Import all Locations” all updates will be applied in all locations. If you choose “Import for Current Location Only” the location specific information will only update in the current location. Company and Enterprise data fields will always affect all locations.

File View Company Customer Notes Receivable CRM Suppliers Employees Payroll Banking Fixed Assets Inventory Service Wholegoods Lease Rental Reports Web Links Windows Help

RIMSS WinNetStar | Telephony | Inventory Master List | Parts User Defined Fields | Update and Create New Item Masters

Import Details

Item Masters To Be Updated: 10  
Data Fields To Be Updated: 60  
New Item Masters To Be Created: 0  
Exceptions: 0

**WARNING!!**  
This process uses the Price Book Defaults or the Location Defaults to set the values for Accounting Source, Pricing Source, Stocking Source and Stock Class for any newly created Item Masters. Please ensure that these values are set correctly before proceeding. Price Book Defaults are found by navigating to Company>Location Support Lists>Price Book Defaults.

Drag a column header here to group by that column

Ignore	New Item	Updates	Processed	Exception	Exception ...	Item Number	Price Book	OEM Vendor	OEM Division	Item Descri...	User Descri...	Primary Bin	Cost	Core Charge	List	Trade	Special 1	Special 2	Sp
<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	117191	MAN-BRA	BRA		SKID SHOE...	SKID SHOE...	C-14	62.00	0	98.00	91.00	0	0	
<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	117193	MAN-BRA	BRA		CARBIDE T...	CARBIDE T...	C-14	420.00	0	465.00	450.00	0	0	
<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	117194	MAN-BRA	BRA		BLADE SET ...	BLADE SET ...	C-15	675.00	0	815.00	800.00	0	0	
<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	1790	MAN-BRA	BRA		FLANGE LO...	FLANGE LO...	C-15	2.50	0	3.25	3.00	0	0	
<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	1872	MAN-BRA	BRA		PLOW BOLT	PLOW BOLT	Showroom	2.50	0	3.25	3.00	0	0	
<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	117191	MAN-BRA	BRA					0	0	0	0	0	0	
<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	117193	MAN-BRA	BRA					0	0	0	0	0	0	
<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	117194	MAN-BRA	BRA					0	0	0	0	0	0	
<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	1790	MAN-BRA	BRA					0	0	0	0	0	0	
<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	1872	MAN-BRA	BRA					0	0	0	0	0	0	

Click on the correct import option below to apply updates.  
Note that some fields are location specific (i.e. pricing, Primary Bin) and some will affect the entire Enterprise (i.e. Description)

Print | Calculate Changes | Import For Current Location Only | Import All Locations | Cancel

port Details

m Masters To Be Updated: 10

ta Fields To Be Updated: 60

w Item Masters To Be Created: 0

ceptions: 0

**WARNING!!**

This process uses the Price Book Defaults or the Location Defaults to set the values for Accounting Source, Pricing Source, Stocking Source and Stock Class for any newly created Item Masters. Please ensure that these values are set correctly before proceeding. Price Book Defaults are found by navigating to Company>Location Support Lists>Price Book Defaults.

); a column header here to group by that column

Ignore	New Item	Updates	Processed	Exception	Exception ...	Item Number	Price Book	OEM Vendor	OEM Division	Item Descri...	User Descri...	Primary Bin	Cost	Core Charge	List	Trade	Special 1	Special 2
<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		117191	MAN-BRA	BRA		SKID SHOE...	SKID SHOE...	C-14	62.00	0	98.00	91.00	0	0
<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		117193	MAN-BRA	BRA		CARBIDE T...	CARBIDE T...	C-14	420.00	0	465.00	450.00	0	0
<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		117194	MAN-BRA	BRA		BLADE SET ...	BLADE SET ...	C-15	675.00	0	815.00	800.00	0	0
<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		1790	MAN-BRA	BRA							3.25	3.00	0	0
<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		1872	MAN-BRA	BRA							3.25	3.00	0	0
<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		117191	MAN-BRA	BRA							0	0	0	0
<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		117193	MAN-BRA	BRA							0	0	0	0
<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		117194	MAN-BRA	BRA							0	0	0	0
<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		1790	MAN-BRA	BRA					0	0	0	0	0	0
<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		1872	MAN-BRA	BRA					0	0	0	0	0	0

**Confirm Import**

?

This will import changes from 10 row(s) into all locations in the current company. Are you ready to import?

You will need to confirm the import prior to the system making the updates to you database.

Import Details

Item Masters To Be Updated:

Data Fields To Be Updated:

New Item Masters To Be Created:

Exceptions:

**WARNING!!**

This process uses the Price Book Defaults or the Location Defaults to set the values for Accounting Source, Pricing Source, Stocking Source and Stock Class for any newly created Item Masters. Please ensure that these values are set correctly before proceeding. Price Book Defaults are found by navigating to Company>Location Support Lists>Price Book Defaults.

Drag a column header here to group by that column

Ignore	New Item	Updates	Processed	Exception	Exception ...	Item Number	Price Book	OEM Vendor	OEM Division	Item Descri...	User Descri...	Primary Bin	Cost	Core Charge	List	Trade
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>								=	=	=	=
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>		117191	MAN-BRA	BRA		SKID SHOE...	SKID SHOE...	C-14	62.00	0	98.00	91.
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>		117193	MAN-BRA	BRA		CARBIDE T...	CARBIDE T...	C-14	420.00	0	465.00	450.
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>		117194	MAN-BRA	BRA		BLADE SET ...	BLADE SET ...	C-15	675.00	0	815.00	800.
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>		1790	MAN-BRA	BRA		FLANGE LO...	FLANGE LO...	C-15	2.50	0	3.25	3.
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>		1872	MAN-BRA	BRA		PLOW BOLT	PLOW BOLT	Showroom	2.50	0	3.25	3.
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>		117191	MAN-BRA	BRA					0	0	0	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>		117193	MAN-BRA	BRA					0	0	0	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>		117194	MAN-BRA	BRA					0	0	0	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>		1790	MAN-BRA	BRA					0	0	0	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>		1872	MAN-BRA	BRA					0	0	0	

Once the updates are complete, the system will verify by marking the line items as "Processed" or "Exceptions"

Print

Calculate Changes

Import For Current Location Only

Import All Locations

Cancel

RIMSS WinNetStar | Telephony | **Inventory Master List** | Parts User Defined Fields | Update and Create New Item Masters

Add New Refresh Print Layouts Bin Labels Manual Entry User Reports

Location: MATTAWAN | Price Book: MAN-BRA | Item Number: | OEM Vendor: ALL | OEM Division: | Item Description: | Fetch

Category: | Group: | Class: | Pricing Source: | Stock Class: | Exact

Default

Drag a column header here to group by that column

Select...	Associations	Inactive	Has Associations	Data Source	Location System	Item Number	Price Book	Oem Vendor	Oem Division	Description	User Description	Primary Bin	Mfg Cost	Mfg Core	Mfg List	Mfg Trade	Package Multiple	PartCusto...	Category	Group	Class	UPC	SKU
<input type="checkbox"/>	<input type="checkbox"/>	False	<input type="checkbox"/>	Location	43089	117191	MAN-BRA	BRA		SKID SHOE WEAR PLATE	SKID SHOE...	C-14	\$62.00	\$0.00	\$98.00	\$91.00	1.0	Special	Spring Preseason	Special Ven...	Industry	12345678	64358215
<input type="checkbox"/>	<input type="checkbox"/>	False	<input type="checkbox"/>	Location	43090	117193	MAN-BRA	BRA		CARBIDE TOOTH KIT	CARBIDE T...	C-14	\$420.00	\$0.00	\$465.00	\$450.00	1.0	Special	Spring Preseason	Special Ven...	Industry	23456780	54816873
<input type="checkbox"/>	<input type="checkbox"/>	False	<input type="checkbox"/>	Location	43091	117194	MAN-BRA	BRA		BLADE SET BRADCO GROUND SH...	BLADE SET ...	C-15	\$675.00	\$0.00	\$815.00	\$800.00	1.0	Special	Spring Preseason	Special Ven...	Industry	34567891	65498573
<input type="checkbox"/>	<input type="checkbox"/>	False	<input type="checkbox"/>	Location	43479	1790	MAN-BRA	BRA		FLANGE LOCK NUT	FLANGE LO...	C-15	\$2.50	\$0.00	\$3.25	\$3.00	5.0	Special	Spring Preseason	Special Ven...	Industry	65432198	64387651
<input type="checkbox"/>	<input type="checkbox"/>	False	<input type="checkbox"/>	Location	43487	1872	MAN-BRA	BRA		PLOW BOLT	PLOW BOLT	Showroom	\$2.50	\$0.00	\$3.25	\$3.00	5.0	Special	Spring Preseason	Special Ven...	Industry	32165472	97528587

I can now review my updates in the inventory list.

File View Company Customer Notes Receivable CRM Suppliers Employees Payroll Banking Fixed Assets Inventory Service Wholesales

RIMSS WinNetStar | Telephony | **Inventory Master List** | Parts User Defined Fields | Update and Create New Item Masters | **Item Number - 117191-BRA-- (42447)**

Save Save and Close Save and New Copy To Other Location

General **Mfg. Data** Associated Items Locations Pricing Metrics Sales History Notebook Attachments User Defined Fields

**Manufacturer Data**

Description	Value
> Item Code	
Product Code	
Group Code	
Category	
Order	
Return	
Vendor	
Population	
Vendor Marketing Code	
Warranty Code	
Commodity Code	
ATA Code	
Focus/Regional Indicator	
Hazardous Material Indica...	
Seasonal Part Indicator	

Secondary Identifiers can be verified by searching for the Secondary ID# or reviewing the Mfg. Data tab of the item master.

AMAX APR			
APR Code	APR Source	APR Season	APR Qty
> A	D		0

**Secondary Identifiers**

Identifier
> 435478
Wear Plate

Promotional Codes

Code	Description	From Qty	To Qty	Cost	Effective Date	Expiration Date	Order Type
------	-------------	----------	--------	------	----------------	-----------------	------------