INVENTORY UPLOAD INSTRUCTIONS

Inventory Stock Record Upload

Instructions for uploading Inventory to an Inventory location. This process can be used to add the initial stock or to adjust on-hand counts and/or par levels after an audit is performed.
Note the Product and Inventory Items must exist prior to the uploading process or the item will fail to upload.
Only Users with the Admin role see the Upload options under the Admin tab.

Navigate into the Inventory Location where stock records are going to be imported and make note of the inventory id in the page URL. This number will be added to the spreadsheet prior to uploading the data.

In a spreadsheet enter the data in the following columns to ensure it is uploaded accurately:

	A	B	C	D	E
1	Inventory Location ID	Inventory Item Number	PAR	Stock Count	
2	888	01ES-S	10	10	
3	888	01ES-M	20	20	
4	888	01ES-L	20	20	
5	888	01ES-XL	5	5	
6					
7					

INVENTORY UPLOAD INSTRUCTIONS

In MotionMD go to Admin tab > Stock Records

Admin ▾

| Users |
| Roles |
| Account Settings |

MASS ENTRY
Account Inventory Item Preferences
HCPCS Codes for Products
Medical Professionals
Sales Prices
Stock Records
Users
Vendor Purchase Attributes
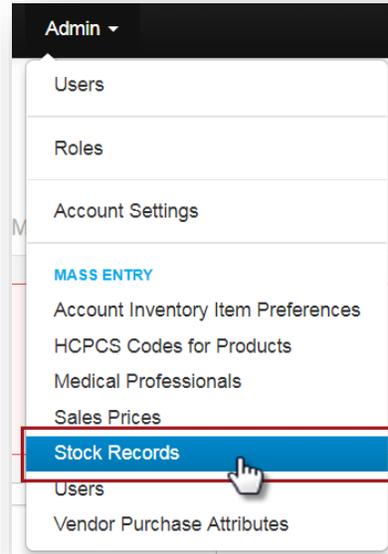
Click New Batch button on Stock Records upload page

MOTIONMD   Clinical ▾   Inventory ▾   Revenue ▾   Reports ▾   Admin ▾   Help ▾   + ▾   ▲ ▾

Stock Records   New Batch

Download All Records   This will download a CSV containing all records currently in the database.
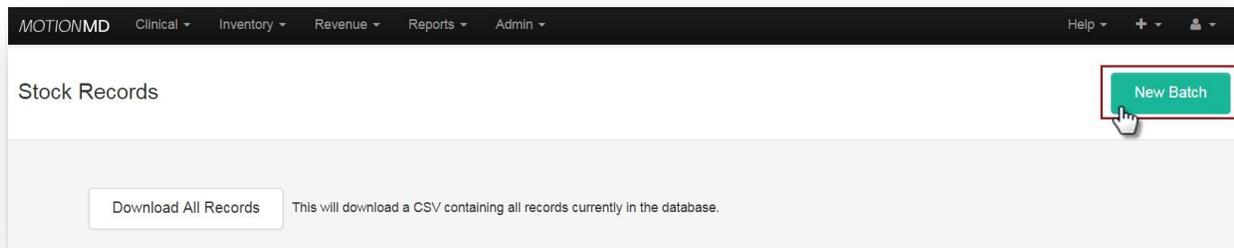
The New upload page opens

MOTIONMD   Clinical ▾   Inventory ▾   Revenue ▾   Reports ▾   Admin ▾

Stock Records Batches / New

Stock Records Batch New

Inventory Location ID	Inventory Item Number	PAR	Stock Count

Copy + Paste rows to this page to start batch import.
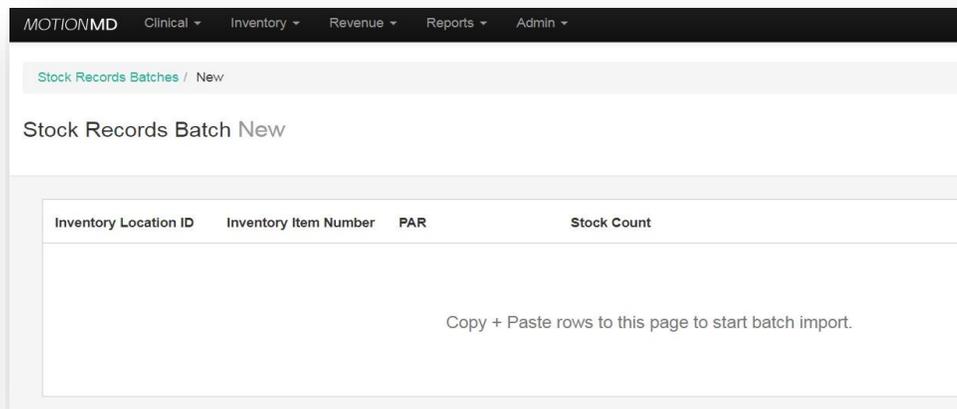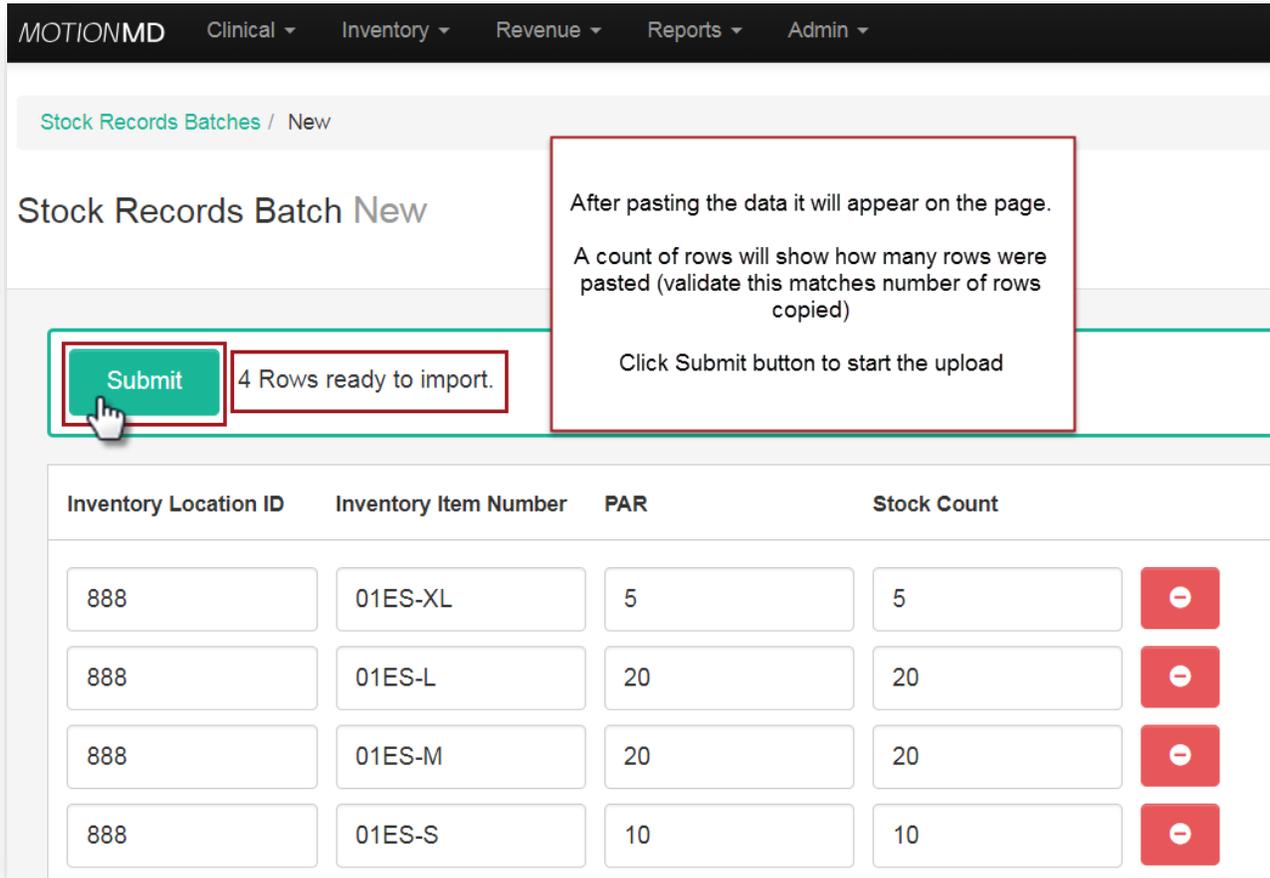
INVENTORY UPLOAD INSTRUCTIONS

On spreadsheet copy all rows and the four columns of data. Do not copy the headers. Click into the Copy + Paste section with mouse then Paste into the section below the headers on the New Batch page. **Note:** Paste only works using Control/Command V to get data to paste onto page. Right click and paste on mouse does not work.

INVENTORY UPLOAD INSTRUCTIONS

After Submitting, the stock records will process. Once this is complete the successful rows will show Green checks.

| MOTIONMD | Clinical ▾ | Inventory ▾ | Revenue ▾ | Reports ▾ | Admin ▾ | | | Help ▾ | ➕ ▾ | 👤 ▾ |

Stock Records Batches / Created on 01/08/2019 01:32 PM by Cynthia Sever

All Failed   ⊕ Download Failed Rows   New Batch

4 of 4 items have been processed.

Inventory Location ID	Inventory Item Number	PAR	Stock Count	
888	01ES-XL	5	5	✅
888	01ES-L	20	20	✅
888	01ES-M	20	20	✅
888	01ES-S	10	10	✅

Rows successfully updated will appear with Green check. Any failed rows show Red

Failed rows can be filtered by clicking on the Failed button. Any failed rows can be corrected on the page and resubmitted. Failed rows can also be downloaded into a CSV by clicking the Download Failed Rows button

Lines fail if the product/inventory item does not exist, if the Item Number does not match, if there are duplicate SKU's or Inventory Location ID is incorrect (doesn't match location within account)

Clicking the Failed button will show just the Failed lines. They can be corrected on the page and resubmitted by clicking the Blue refresh button.

Stock Records Batches / Created on 03/22/2017 01:42 PM by Mike Stefanko

All Failed   ⊕ Download Failed Rows   New Batch

31 of 31 items have been processed.

Inventory Location ID	Inventory Item Number	PAR	Stock Count		
914	11-0346-4-04000	0	0	🔄	➖
InventoryLocation does not exist					
914	11-0346-3-04000	0	0	🔄	➖
InventoryLocation does not exist					

On Failed page the error field will be highlighted with message below

The Blue refresh button allows the line to be resubmitted after correcting

The Red button allows you to delete the line