

## INVENTORY ITEM PREFERENCES UPLOAD INSTRUCTIONS

### Inventory Item Preferences Upload

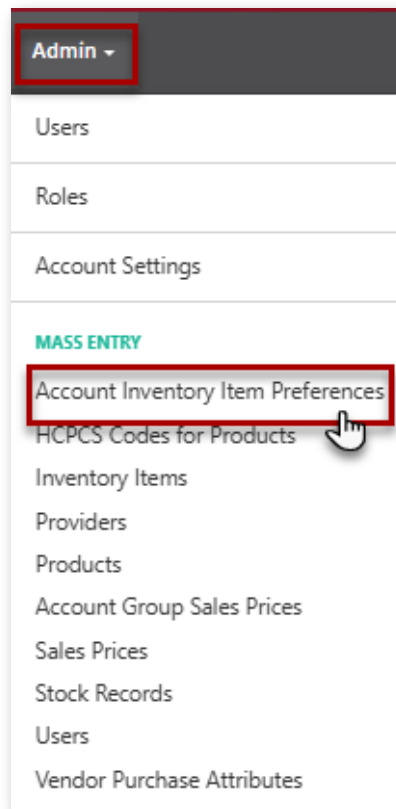
This process can be used to add the initial inventory item preferences or to adjust preferences if changes are needed.

**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 Mass Entry options under the Admin tab.

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

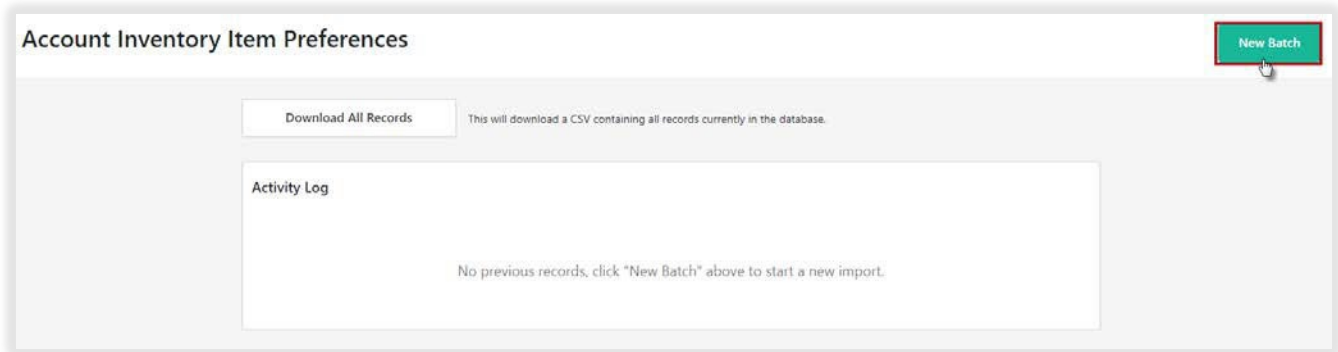
Inventory Item Number	Dipsense From	Billing Channel Name
01EF-S	Stock	Athena
01EF-M	Stock	Athena
11-0215-2	Stock	Athena
11-0215-3	Stock	Athena
11-0215-4	Stock	Athena
380614	Stock	Athena

In MotionMD go to Admin tab > Account Inventory Item Preferences:

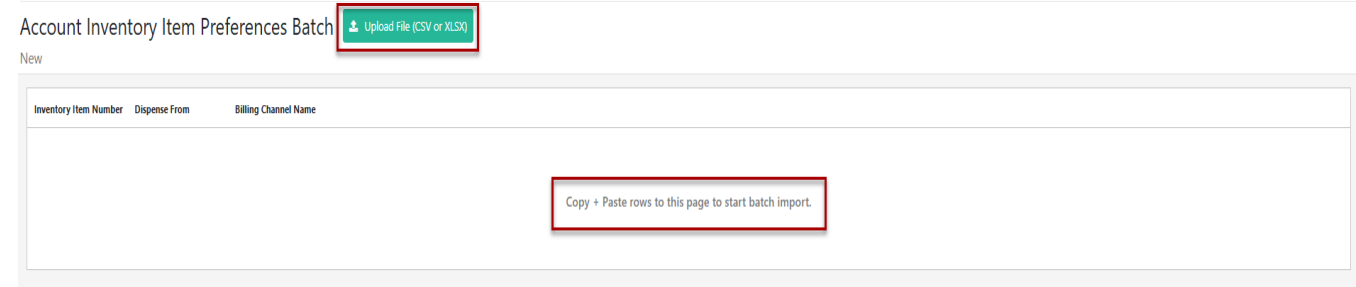


## INVENTORY ITEM PREFERENCES UPLOAD INSTRUCTIONS

Click New Batch button on Account Inventory Item Preferences upload page:



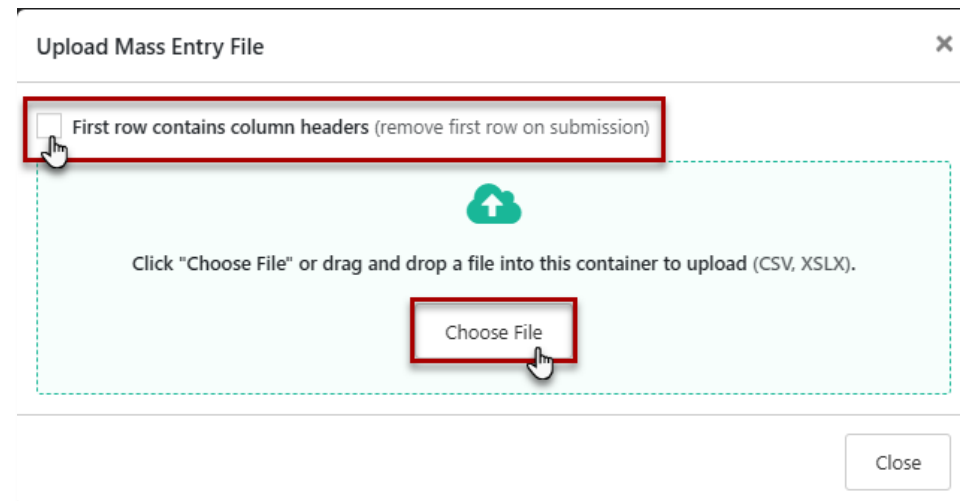
The New upload page opens where users have the option of copy/pasting the data or uploading via CSV or XLSX file.



If copy/pasting data, users should not copy the headers from the spreadsheet. 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.

If uploading via CSV or XLSX file- Please check the box indicating if the first row contains column headers prior to uploading file.



## INVENTORY ITEM PREFERENCES UPLOAD INSTRUCTIONS

Click Submit to start the Upload.

Account Inventory Item Preferences Batch Upload File (CSV or XLSX)

New

Submit
6 Rows ready to import.

Inventory Item Number	Dispense From	Billing Channel Name	
01ef-s	Stock	Athena	-
01ef-m	Stock	Athena	-
11-0215-2	Stock	Athena	-
11-0215-3	Stock	Athena	-
11-0215-4	Stock	Athena	-
380614	Stock	Athena	-

After pasting/uploading the data, it will appear on the page.

A count of rows will show how many rows were pasted/uploaded (validate this with your spreadsheet)

Click Submit button to start the upload

After Submitting, the preference will process. Once this is complete the successful rows will show **green** checks.

All Failed
Resubmit Failed
Download Failed Rows
Download All Rows
New Batch

80 of 80 items have been processed.

Inventory Item Number	Dispense From	Billing Channel Name	
11-2151-9	Stock	CSA Ortho	✔
11-0449-2	Stock	CSA Ortho	✔
11-0449-5	Stock	CSA Ortho	✔
11-0449-4	Stock	CSA Ortho	✔
11-0260-5	Stock	CSA Ortho	✔

Selecting the Failed button will show any Failed lines. They can be corrected on the page and resubmitted by clicking the **blue** refresh button.

All Failed
Resubmit Failed
Download Failed Rows
Download All Rows
New Batch

4 of 4 items have been processed.

Inventory Item Number	Dispense From	Billing Channel Name	
300623-60	Stock	CSA Ortho	<span style="border: 1px solid blue; padding: 2px;">↻</span> <span style="margin-left: 5px; text-align: center;">-</span>

Inventory Item does not exist