

# Materials Manager Pricing and Product Import

The purpose of this document is to educate a user on the steps required to import a Product Pricing File. Pricing Files are supplied by our Sales Reps and are updated yearly. The pricing files available to a shop are set at either Aftermarket Pricing or OEM Pricing. When requesting a Pricing File, please specify which one you want.

The steps listed in this document pertain to the Pro version of the software. However, the same steps are used when importing a Pricing File into Materials Manager Lite minus the ability to import On-Hand and Minimum On-Hand Quantities.

*Note: All pricing listed is suggested pricing. If you feel a price is too high it can be adjusted manually within Product Maintenance.*

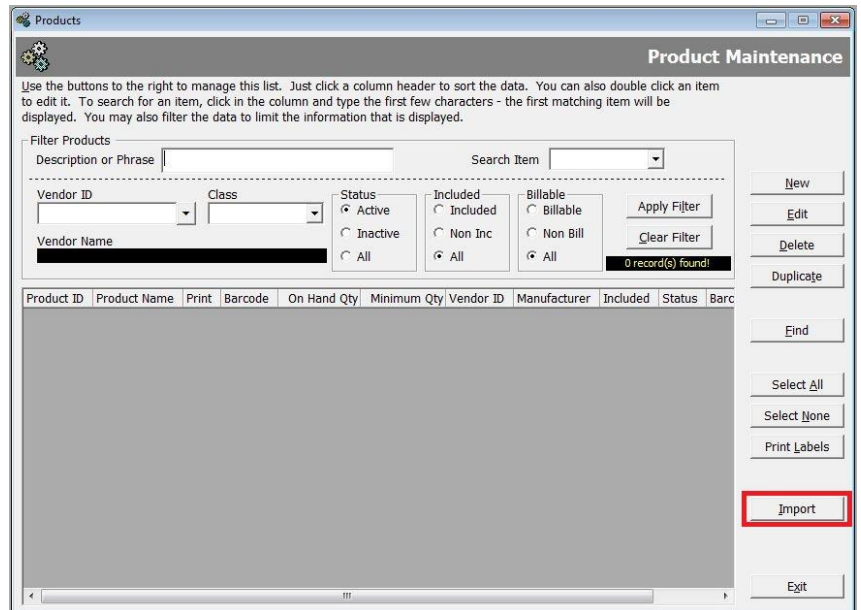
Open up Materials Manager and go to **Product Maintenance**.

*Note: By default, a Tech ID is required to access Product Maintenance.*

*Refer to the Materials Manager manual for the process of creating a Tech ID.*



Select **Import** from the available options within Product Maintenance.



Follow the on-screen steps (1 – 5) to work your way through the import process.

Be aware of Step 4 when selecting the value you wish to import. If you have On-Hand/Minimum On-Hand Quantity values set, **these values will be over-written** during the import process if the boxes are selected.

After selecting the values you wish to import, click the **Accept Button**. You will receive a warning prompt if you have selected the On-Hand/Minimum On-Hand values before proceeding.

Once the import has finished, click the **OK Button** to return to the Main Menu.

**Note: Once the import has started it cannot be stopped. You cannot undo the import of data once it has finished.**

The screenshot shows a software window titled "Product Import" with a dark header bar. The main area contains instructions for five steps, each enclosed in a red box. Step 1: "This process will update the existing products with products imported from a special import file. You must have this file before you can continue. Please specify the name of the file below - or press the ... button to browse for this file." Below this is an "Import File:" text box with a browse button. Step 2: "Preview the Import File in the Grid Below" with a "Preview" button. Step 3: "Review the import data. Click a column header to resort the data. To search for an item, set focus to the column you want to search and type the first few characters - the first matching item will be displayed." Below this is a table with columns: Product ID, Product Name, Barcode, Manufacture, Reorder Unit, Reorder Qty, Cost. The table is currently empty. Step 4: "Choose values to import. Be careful with overwriting quantity values!" This points to a list of "Import Items" with checkboxes: Product Name, Barcode, Manufacturer, Reorder Unit, Reorder Quantity, Cost, List Price, Class, Billable, Vendor ID, On Hand Quantity, Minimum Quantity, Included, Barcode2. There are "Clear All" and "Select All" buttons below the list. Step 5: "If the import data looks OK, press the Accept button to update your product list. This process can't be un-done." This points to an "Accept" button. At the bottom right is an "Exit" button. At the bottom left, it says "Total Products: 0" and "Skipped Lines: 0".

**Step 1:** This process will update the existing products with products imported from a special import file. You must have this file before you can continue. Please specify the name of the file below - or press the ... button to browse for this file.

Import File:  ...

**Step 2:** Preview the Import File in the Grid Below

**Step 3:** Review the import data. Click a column header to resort the data. To search for an item, set focus to the column you want to search and type the first few characters - the first matching item will be displayed.

Product ID	Product Name	Barcode	Manufacture	Reorder Unit	Reorder Qty	Cost
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**Step 4:** Choose values to import.  
**Be careful with overwriting quantity values!**

**Import Items**

- Product Name
- Barcode
- Manufacturer
- Reorder Unit
- Reorder Quantity
- Cost
- List Price
- Class
- Billable
- Vendor ID
- On Hand Quantity
- Minimum Quantity
- Included
- Barcode2

**Step 5:** If the import data looks OK, press the Accept button to update your product list. This process can't be un-done.

Total Products: 0      Skipped Lines: 0

