

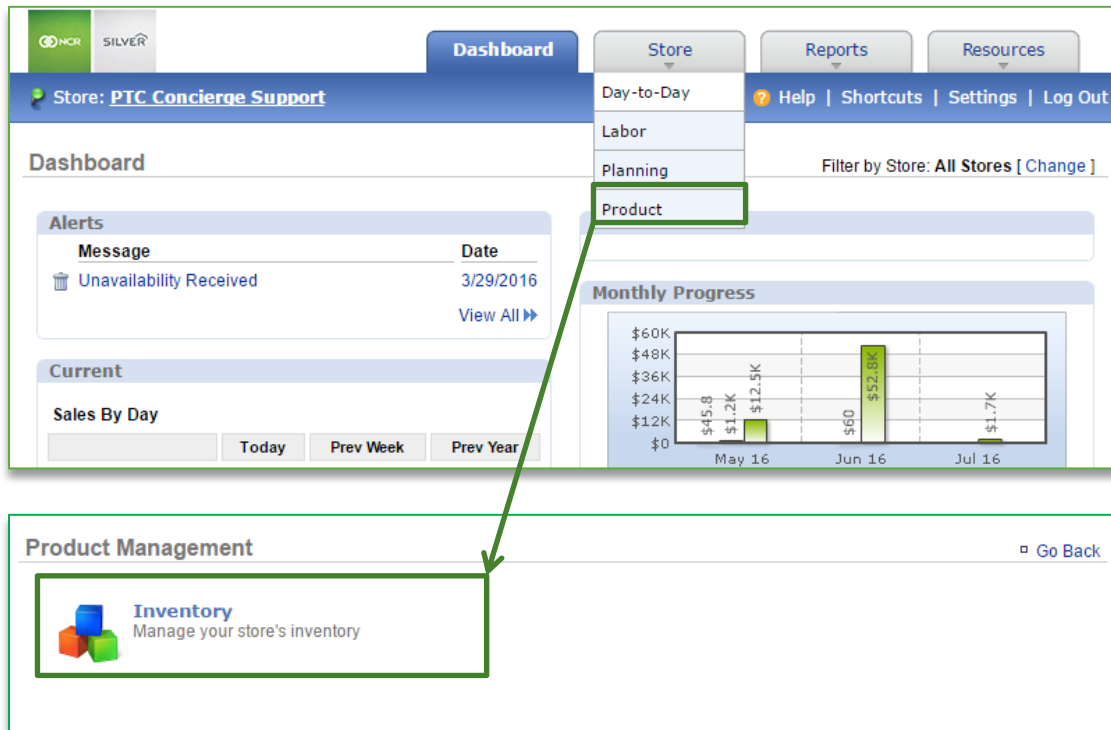
PREFACE

In this module, you will learn:

- How to import vendor invoices to Add Inventory via the Store side portal

IMPORTING INVOICES

The ability to import invoices allows you add items received from vendors into your inventory in bulk with formatted Excel files. To import invoices you will need to navigate to the **Product Management** module and click **Inventory**.




The screenshot shows the Silver University dashboard for the store 'PTC Concierge Support'. The 'Store' dropdown menu is open, highlighting the 'Product' option. A green arrow points from this menu item to the 'Inventory' link in the 'Product Management' section of the dashboard. The 'Inventory' link is accompanied by a small icon of three colored cubes and the text 'Manage your store's inventory'.


TO UPLOAD INVOICES

1. Click **Add Inventory**


Inventory [Go Back](#)



Add Inventory
Update your inventory with the latest delivery or purchase



Take Inventory
Take current inventory of your store and reconcile against theoretical inventory



Inventory Tools
Tools to create and manage all your inventory items, including recipe and ingredients

2. Click **More Options**
3. Click **Import Invoice**

Add Inventory [Go Back](#) [More Options](#)

As of:

Category: BAR

	Item	Min Qty	Max Qty	Quantity	Units	Unit Cost
Hide	1235			+/- <input type="text"/>	Select a unit <input type="text"/>	<input type="text"/>
Hide	Beer (single)			+/- <input type="text"/>	Select a unit <input type="text"/>	<input type="text"/>
Hide	BudLight			+/- <input type="text"/>	Select a unit <input type="text"/>	<input type="text"/>
Hide	Long Island			+/- <input type="text"/>	Select a unit <input type="text"/>	<input type="text"/>
Hide	shot			+/- <input type="text"/>	Select a unit <input type="text"/>	<input type="text"/>

4. Click [here](#) to download the formatted template.

Import Invoice [Go Back](#)

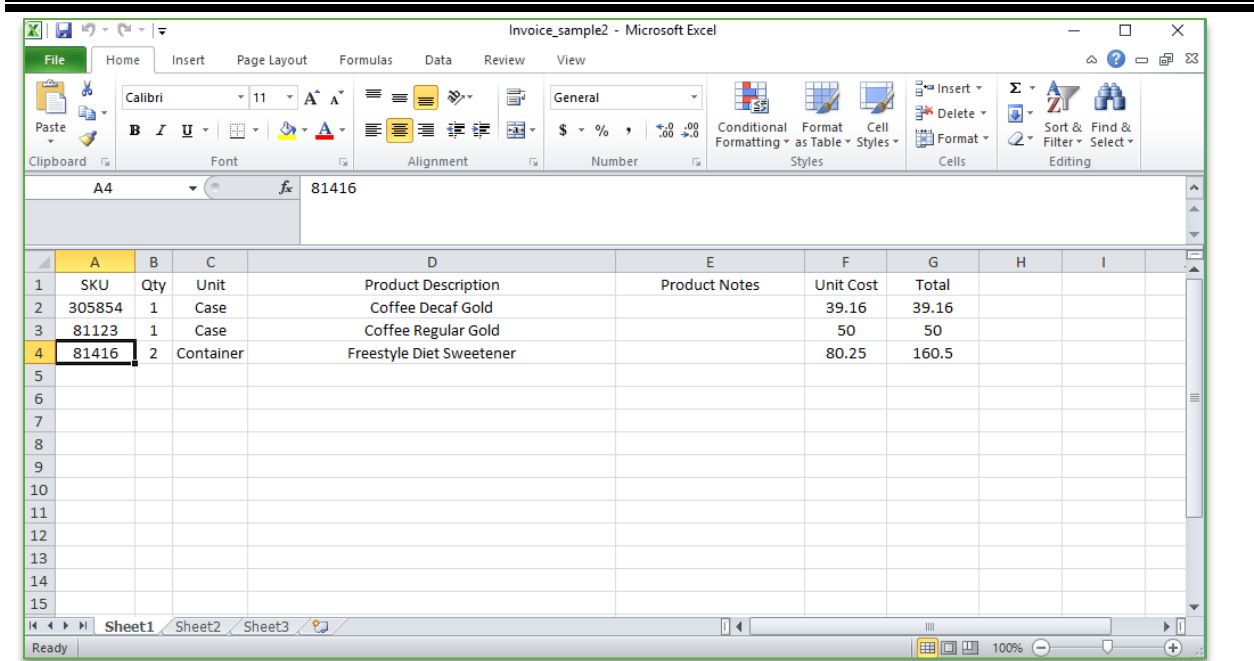
Format

No File Chosen
[Click here to view a sample](#)

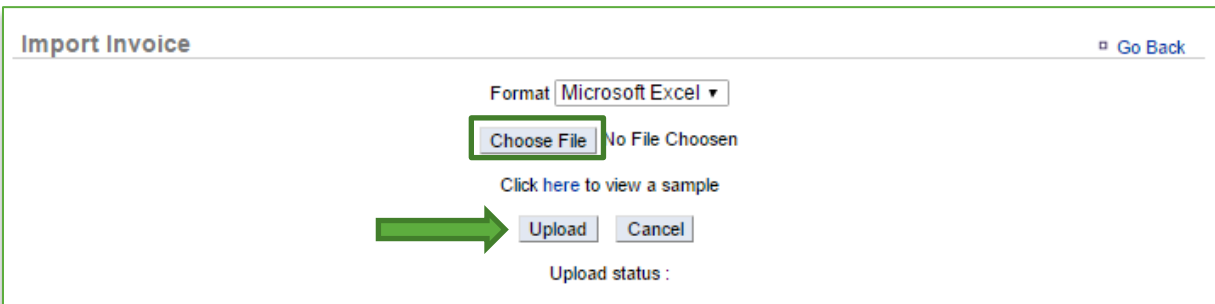
Upload status :

Important reminders about the format of your invoice

- a. You **MUST** have SKU numbers set up in Console for each ingredient listed within your invoice
- b. Those SKU numbers **MUST** match the SKU numbers listed within your invoice
- c. Quantity field **MUST** include the quantity
- d. Quantity field **CANNOT** include non-numerical values



5. Click **Choose File** to select the invoice you wish to upload
6. Click **Upload**



7. You will be redirected to the **Add Inventory** page
 - a. This page will be populated with the totals from your imported invoice provided they meet the required format criteria noted above
 - i. Those items that do not meet the required criteria will not be imported to show totals
 - b. From here you can made additional changes to any of the editable fields, including the date and time
 - c. Ensure that the **“As of”** date reflects the date on the invoice
 - d. If the **Units** defined in the import file are not an exact match to what is set up in Console, then the largest unit of measure will be populated on the page
8. Click **Next** at the bottom of the page



Add Inventory [Go Back](#) [More Options](#)

As of:

Category: Beverage

	Item	Min Qty	Max Qty	Quantity	Units	Unit Cost
Hide	Coffee Decaf Gold	50 Each	250 Each	+/- <input type="text" value="1"/>	Case 64ct (cs) ▼	<input type="text" value="39.16"/>
Hide	Coffee Regular Gold	50 Each	250 Each	+/- <input type="text" value="1"/>	Case 64ct (cs) ▼	<input type="text" value="50"/>
Hide	Freestyle Diet Sweetener	2 cntr	5 cntr	+/- <input type="text" value="2"/>	Container 2.5gal (cntr) ▼	<input type="text" value="80.25"/>
Hide	Syrup Fruit Punch (3gal)	1 cntr	5 cntr	+/- <input type="text"/>	Container 3gal (cntr) ▼	<input type="text" value="41.85"/>
Hide	Syrup Fruit Punch (5gal)			+/- <input type="text"/>	Container 5gal (cntr) ▼	<input type="text" value="67.45"/>
Hide	Syrup Lemonade Pink BIB			+/- <input type="text"/>	BIB 3gal (bib) ▼	<input type="text" value="41.85"/>
Hide	Syrup Mountain Dew			+/- <input type="text"/>	BIB 5gal (bib) ▼	<input type="text" value="67.45"/>
Hide	Syrup Mountain Dew Diet			+/- <input type="text"/>	BIB 3gal (bib) ▼	<input type="text" value="41.85"/>

Category: Test Items

	Item	Min Qty	Max Qty	Quantity	Units	Unit Cost
Hide	Bun Hamburger GF Clssc 3.2oz			+/- <input type="text"/>	Case 24ct (cs) ▼	<input type="text" value="23.60"/>
Hide	Mushroom Slicd Thin 1/4in			+/- <input type="text"/>	Container 10lb (cntr) ▼	<input type="text" value="19.66"/>

- A summary of your Add will appear in a pop-up window
- Click **Finalize**

Add Inventory Summary

Effective Date: 10/28/2016 9:29 AM

Total Items: 3

Invoice Total: \$249.66

Note: To ensure that the SKU numbers on your invoice match the SKU numbers in the application, click **More Options** and **Download SKU List**. This will generate a file that allows you to compare what you have set up for each item to the SKU listed on your invoice.



Add Inventory Go Back **More Options**

As of: 6/21/2016 10:18 AM

Category: BAR

	Item	Min Qty	Max Qty	Quantity	Units	Unit Cost
Hide	1235			+/-	Select a unit	
Hide	Beer (single)			+/-	Select a unit	
Hide	BudLight			+/-	Select a unit	
Hide	Long Island			+/-	Select a unit	
Hide	shot			+/-	Select a unit	

Note: A green arrow points from the 'More Options' button to a dropdown menu containing: Display Options, Download SKU List, Import Invoice, and View History.

ItemSKUList - Microsoft Excel

Item SKU	Item Name									
305854	Coffee Decaf Gold									
81123	Coffee Regular Gold									
81416	Freestyle Diet Sweetener									
	Syrup Fruit Punch (3gal)									
	Syrup Fruit Punch (5gal)									
	Syrup Lemonade Pink BIB									
	Syrup Mountain Dew									
	Syrup Mountain Dew Diet									
	Syrup Mug Root Beer (3gal)									
	Syrup Mug Root Beer (5gal)									
	Syrup Pepsi									
	Syrup Pepsi Diet									
	Syrup Pink Lemonade									
	Syrup Raspberry Tea									