



Data import process

We need either two or three .csv files from your Inventory Management system:

- Products Catalog
- Bill of Materials (if you build your products)
- Sales history

Estimated time for first set up & discovery: 4 hours

Estimated time for subsequent updates: 15 minutes

Step 1: Products file

Log in to StockTrim and check out the required file format

The screenshot shows the 'Load Data - Stock trim' web application. The 'LOAD DATA' menu item is highlighted in the navigation bar. The main content area is titled 'LOAD DATA' and contains the following sections:

- UPLOAD FROM CSV FILE**
- UPLOAD PRODUCTS FILE**: A dashed box containing an upload icon, a 'SELECT PRODUCTS FILE' button, and the text 'OR DRAG & DROP HERE'.
- PRODUCTS FILE SPECIFICATION**: A table with two tabs, 'TEMPLATE' and 'EXAMPLE', and a list of fields with their descriptions and constraints.

Field	Description	Constraints
ProductId	Your product reference for the product.	*Must be unique
Name	Name of the product	
Category	Your defined category of the product	
SubCategory	Your defined sub-category of the product	
ServiceLevel	Desired service level for the product. (ie: probability of not having a stock out)	Must be a decimal between 0 and 1. Recommended between 0.85 and 0.97. Defaults to 0.95 if missing.
LeadTime	The lead time in days The time between now and when the order should arrive (taking into account supplier lead time and internal operation)	
StockOnHand	The number of products you have in stock	
StockOnOrder	The number of products you have on order	
Cost	The cost price of the product.	
Price	The sell price of the product	
Supplier	The supplier name.	Should be consistent. A new supplier will be created if the name doesn't match an existing supplier.

Export your products data to CSV (or Excel). Consult your Inventory Management system how-to guide if this is unclear.



Ensure the header fields' names match the required file format, and save as CSV

POSSIBLE DATA LOSS Some features might be lost if you save this workbook in the comma-delimited (.csv) format. To preserve these features, save it in an Excel file format.

Id	ProductName	Category	SubCategory	ServiceLevel	LeadTime	StockOnHand	StockOnOrder	Cost	Price
AWB3-CST	Merino 1 t-shirt	ILS3002	ILS60	0.95	3	381	80	\$30.00	\$40.00
AWB3-EFS	Merino 2 bottoms	ILS3002	ILS40	0.95	3	800	200	\$20.00	\$30.00
AWB3-MBL	Storm light jkt								
AWB3-TBK	Stretch ascent jkt								
AWT2-CST	Merino 2 t-shirt								
AWT2-EFS	Merino 3 pants								
WWT2-75-TBK	Morning glory dress								
WWT2F-DOL	Morning glory skirt								
WWT2F-TBK	Morning glory tights								
AP178-SGY	Torrentshell jkt								
AP182-HCH	Torrentshell pants								
AP182-TWT	Trampoli t-shirt								
AP186-MRN	Cap 4 zip neck								
AP185-GHT	Corinne dress								
AP180-TBK	Cotton fleece hoody								
AP180-TWT	Nano puff p/o								
AP181-CBL	Nine trails jkt								
AP181-DKF	Down sweater vest								
AP179-IND	Drift shirt								
AP179-STG	Duway skirt								
AP176-TBK	Ester top								
AP155-HCH	Freedom to roam t-shirt								
AP155-TWT	Girona board shorts								
AP164-CBL	North coast t-shirt								

Save As

File name: Test Items Superstore.csv

Save as type: CSV (Comma delimited) (*.csv)

Save

Import into StockTrim

Load Data - Stock trim

https://go.stocktrim.com/LoadData

DASHBOARD **LOAD DATA** ORDER PLAN PURCHASE ORDERS HELP LOG OUT

LOAD DATA

UPLOAD FROM CSV FILE

UPLOAD PRODUCTS FILE

SELECT PRODUCTS FILE
OR DRAG & DROP HERE

PRODUCTS FILE SPECIFICATION

TEMPLATE EXAMPLE

ProductId	Your product reference for the product.	*Must be unique
Name	Name of the product	
Category	Your defined category of the product	
SubCategory	Your defined sub-category of the product	
ServiceLevel	Desired service level for the product. (ie: probability of not having a stock out)	Must be a decimal between 0 and 1. Recommended between 0.85 and 0.97. Defaults to 0.95 if missing.
LeadTime	The lead time in days The time between now and when the order should arrive (taking into account supplier lead time and internal operation)	
StockOnHand	The number of products you have in stock	
StockOnOrder	The number of products you have on order	
Cost	The cost price of the product.	
Price	The sell price of the product	
Supplier	The supplier name.	Should be consistent. A new supplier will be created if the name doesn't match an existing supplier.

Step 2: BOM File

(skip this step if you don't manufacture products)

Follow the same process as above:

Load Data - Stock trim

https://go.stocktrim.com/LoadData

DASHBOARD **LOAD DATA** ORDER PLAN PURCHASE ORDERS HELP LOG OUT

LOAD DATA

LOAD FROM API

UPLOAD FROM CSV FILE

UPLOAD PRODUCTS FILE

SELECT PRODUCTS FILE
OR DRAG & DROP HERE

FILE SPECIFICATION

UPLOAD BILL OF MATERIALS FILE (for manufacturers)

SELECT COMPONENTS FILE
OR DRAG & DROP HERE

BOM FILE SPECIFICATION

TEMPLATE EXAMPLE

ProductId	The product code of a finished product	*Must match a ProductId loaded above
ComponentId	The product code of a component of this product	*Must match a ProductId loaded above
Quantity	The quantity of these components used to manufacture the finished product	
AssemblyTime	The time for assembly or manufacture in days.	

Important things to note: • Each line should contain only ONE entry for a ProductId, ComponentId, and Quantity.

UPLOAD PURCHASE ORDERS FILE

SELECT PURCHASEORDERS FILE
OR DRAG & DROP HERE

In StockTrim, check out the required format:

Export your BOM data from your inventory management system



Ensure the header fields' names match the required file format, and save as CSV

ProductId	ComponentId	Quantity	AssemblyTimeDays
2 PPP1000	PPP500		
3 SCP1000	CP1000		
4 BWS	SPN		
5 BWS	WSK		
6 BER200	BERbulk	0.	
7 BER200	BER800		
8 BER200	SPN		
9 10BER200	BER200		
10 BER400	BER200		
11 BER800	BER200		
12 BER80	BERbulk	0.0	
13 BER80	KraftBER80		
14 BER80	OmnigBER80		
15 20BER80	BER80	5	
16 GRE100	OmnigGRE100		
17 GRE100	GREbareBatch	0.00033079	
18 GRE100	KraftGRE100		
19 2GRE100	GRE100		
20 20GRE100	GRE100	2	
21 GRE100	GRE250		
22 GRE250	GREbareBatch	0.00075254	
23 GRE250	KraftGRE250		
24 GRE250	OmnigGRE250		
25 10GRE250	GRE250	1	

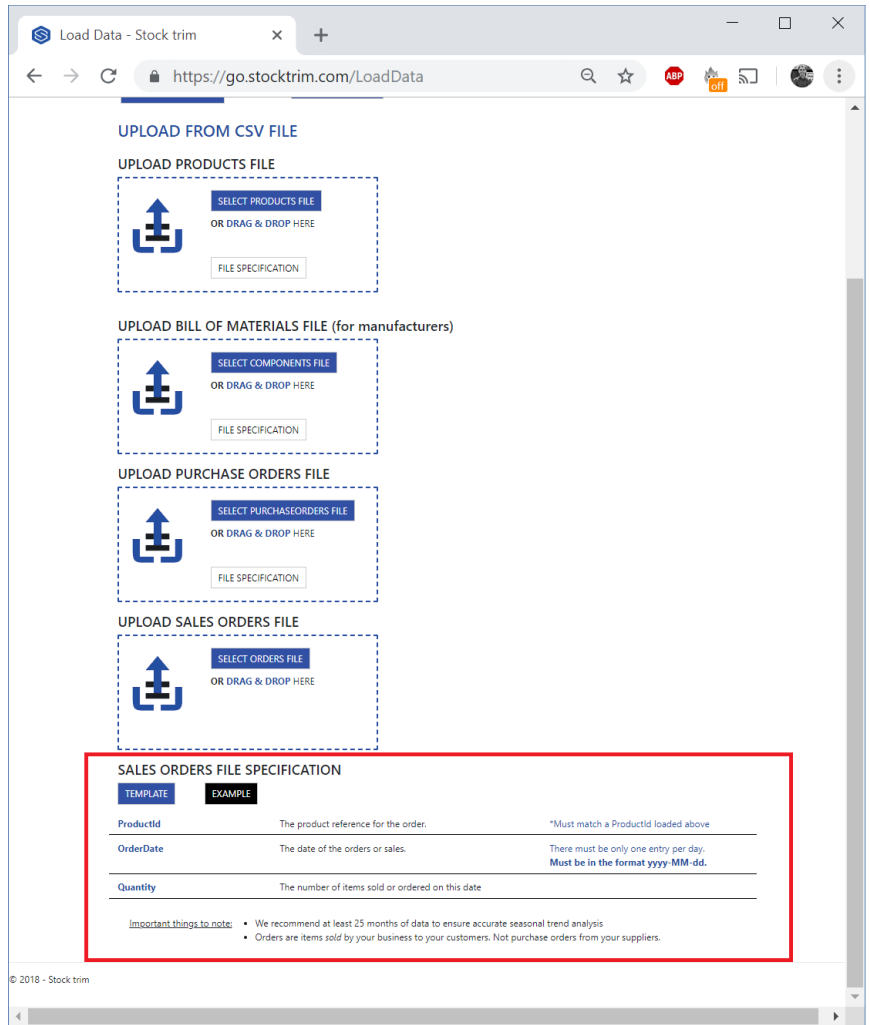
Import into StockTrim

Field	Description	Notes
ProductId	The product code of a finished product	*Must match a ProductId loaded above
ComponentId	The product code of a component of this product	*Must match a ProductId loaded above
Quantity	The quantity of these components used to manufacture the finished product	
AssemblyTime	The time for assembly or manufacture in days.	

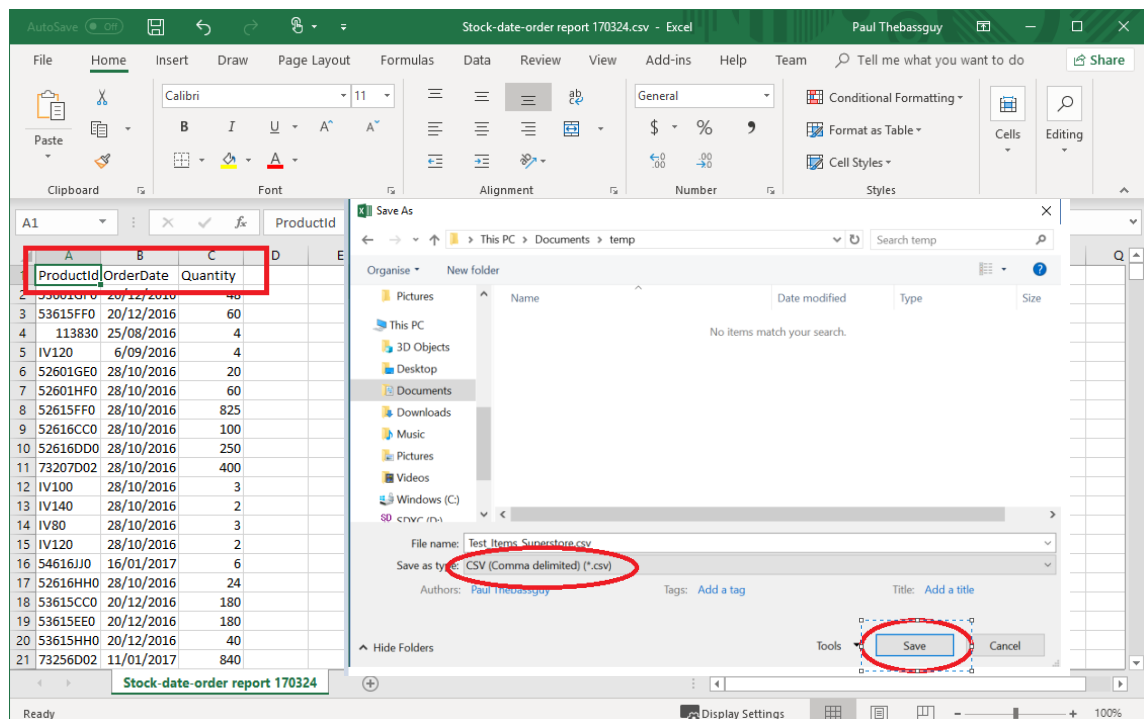
Step 3: Sales History

Same process again:

In StockTrim, check out the required format:



Export your sales data from your inventory management system – we recommend 25 months history for first time loads. After that, only the latest sales orders are required. Then, ensure the header fields' names match the required file format, and save as CSV



Import into StockTrim

UPLOAD FROM CSV FILE

UPLOAD PRODUCTS FILE

SELECT PRODUCTS FILE
OR DRAG & DROP HERE
FILE SPECIFICATION

UPLOAD BILL OF MATERIALS FILE (for manufacturers)

SELECT COMPONENTS FILE
OR DRAG & DROP HERE
FILE SPECIFICATION

UPLOAD PURCHASE ORDERS FILE

SELECT PURCHASEORDERS FILE
OR DRAG & DROP HERE
FILE SPECIFICATION

UPLOAD SALES ORDERS FILE

SELECT ORDERS FILE
OR DRAG & DROP HERE

SALES ORDERS FILE SPECIFICATION

TEMPLATE EXAMPLE

ProductId	The product reference for the order.	*Must match a ProductId loaded above
OrderDate	The date of the orders or sales.	There must be only one entry per day. Must be in the format yyyy-MM-dd.
Quantity	The number of items sold or ordered on this date	

important things to note:

- We recommend at least 25 months of data to ensure accurate seasonal trend analysis
- Orders are items sold by your business to your customers. Not purchase orders from your suppliers.

© 2018 - Stock trim

Further FAQ:

What about Purchase Orders?

The Purchase Order history import is optional. It's good for automatically setting the lead time, or setting the on-order amounts if they are not able to be included in your products import.

Follow the same process to import purchase orders, and see the template and example files.

It takes too long for me to adjust the headers into the right format, what can I do?

Just send a message to Paul – paul.simpson@stocktrim.com and attach the raw export from your inventory management system. We'll then make a change at our end to accept your files.

Do I need to upload my entire sales history every time?

No. Only the first time you set up StockTrim. After that, only the latest sales orders need to be uploaded.

What if I upload duplicate sales orders?

If the same sales orders are uploaded more than once, StockTrim will automatically detect and remove the duplicates.

How often do I need to upload my data?

You should upload your products and sales history data every time you place your supplier orders, but no more than once a day, so that your on-hand order quantities are correct and your latest sales figures are taken into account in the forecasts.

After the first time, some users have expressed concern that this may be time consuming for a day-to-day process. But once it becomes part of the normal flow, it always only ends up taking a few minutes each time!