

Follow the below steps to import your inventory and sales data into StockTrim from MYOB AccountRight.

This should be done before you place purchase orders with your suppliers to ensure you place the most economic quantities.

STEP 1: EXPORT FILES FROM MYOB

- Export the item summary report.
 - Go to Reports -> Item List Summary.
 - Select the fields (Item No, Item Name, Supplier, Units on hand, Total value, Average Cost, Current Price)
 - Save as CSV
- Export the Analyze inventory detail report
 - Go to Reports -> Inventory -> Items -> Analyze inventory [Detail] report.
 - Ensure on-order items are selected
 - Export as CSV
- Export the sale items
 - Go to export data -> Sales -> Item Sales. Select fields (*Item Number, Quantity, Date, Shipping Date, Sale Status, Price, Total).
 - This will save ItemSale.txt
- Export auto-build items (only if there have been changes)
 - Go to Reports -> Inventory -> Auto-Build items

STEP 2: IMPORT FILES INTO STOCKTRIM

- In StockTrim select 'Load Data'
- Under the 'Products' section, load the item summary report
- Under the 'Components' section, load the auto-build items export
- Under the 'Purchase Orders' section, load the Analyze inventory detail report
- Under the 'Sales Orders' section, load the sale items export

STEP 3: CHECK SUGGESTIONS AND PLACE ORDERS

- In StockTrim, go to the 'Order Plan' screen
- Review suggested order amounts, and place the orders with your suppliers.