



Importing Stock into Menumate Office - **HOW TO**

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Introduction

MenuMate Office version 5.7.0.32 and greater has the ability to import the stock information in MenuMate via a CSV file. This enables faster implementation of large stock databases with less manual data entry

File Format

The file format requires a set of fields in a CSV file.

Field Name	Description	Sample
Category	Stock Category	Beverages
Group	Stock Group	Spirits
Stock Code	Unique Stock Code	222
Description	Stock Description	Angostura Bitters
Stocktake Unit	How the Stock is Counted	Bottle
Tax	Purchase Tax Rate	15
Location	Stock Location	Bar
Minimum	Minimum Stock Level	2
Maximum	Maximum Stock Level	10
Last Cost	The last purchase cost	19.13
Average Cost	The average purchase cost	18.96
Supplier	The Supplier	8 Ranges Wine
Order Unit	How the stock is ordered	Each
Stock Quantity	Stocktake unit Per Order Unit	1
Cost	Supplier's Code	20.00
Supplier Code	Suppliers Code	A12345
Min Order QTY	Minimum Order Quantity	1
Barcode	Stock Barcode	75496002005

Sample File

The following is a sample file for the stock import.

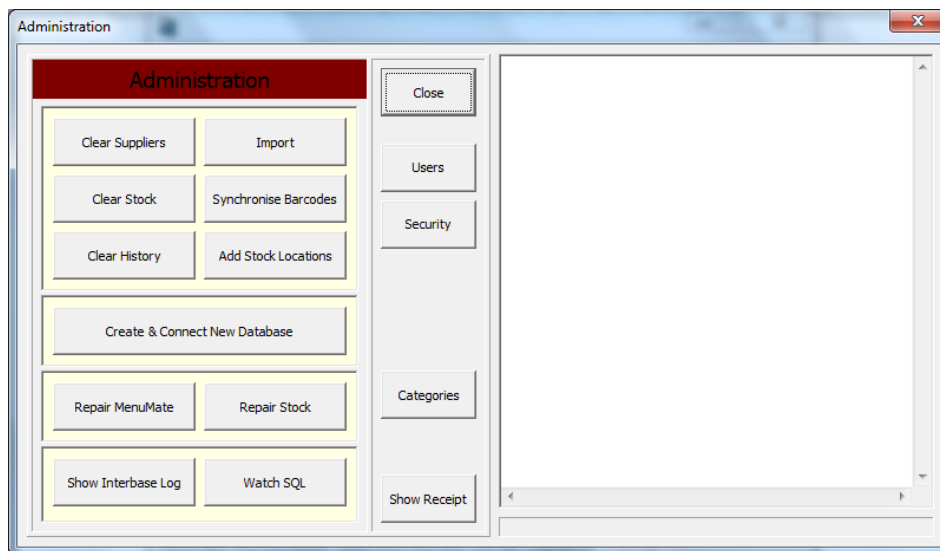
Category,Group,Stock Code,Description,Stocktake Unit,Tax,Location,Minimum Level,Maximum Level,Last Cost,Average Cost,Supplier,Order Unit,Stock Quantity,Cost,Supplier Code,Min Order QTY,Barcode
 Beverage,Splits,222,Angostura Bitters,Bottle,15,Bar,2,10,19.13,18.96,8 Ranges Winery,Each,1,20,A12345,1,75496002005
 Beverage,Splits,294,Bravo Blood Orange,Ltre,15,Bar,1,5,3.55,3.43,Allied Liquir,Bottle,3,11.5,B77282,1,75496002015
 Beverage,Spirits,22,1800 Tequila,Bottle,15,Bar,1,12,63.24,64.23,Allied Liquir,Bottle,1,64.5,C11782,2,75496002999
 Beverage,Beer,23,Monteiths Original,Bottle,15,Bar,50,100,2.38,2.35,DB Breweries,Case,12,29.5,117825,1,75496002998

Category	Group	Stock Cod	Description	Stocktake Unit	Tax	Location	Minimum	Maximum	Last Cost	Average Cost	Supplier	Order Unit	Stock Qua	Cost	Supplier C	Min Order	Barcode
Beverage	Splits	222	Angostura Bitters	Bottle	15	Bar	2	10	19.13	18.96	8 Ranges Winery	Each	1	20	A12345	1	75496002005
Beverage	Splits	294	Bravo Blood Orange	Ltre	15	Bar	1	5	3.55	3.43	Allied Liquir	Bottle	3	11.5	B77282	1	75496002015
Beverage	Spirits	22	1800 Tequila	Bottle	15	Bar	1	12	63.24	64.23	Allied Liquir	Bottle	1	64.5	C11782	2	75496002999
Beverage	Beer	23	Monteiths Original	Bottle	15	Bar	50	100	2.38	2.35	DB Breweries	Case	12	29.5	117825	1	75496002998

Importing Stock Process

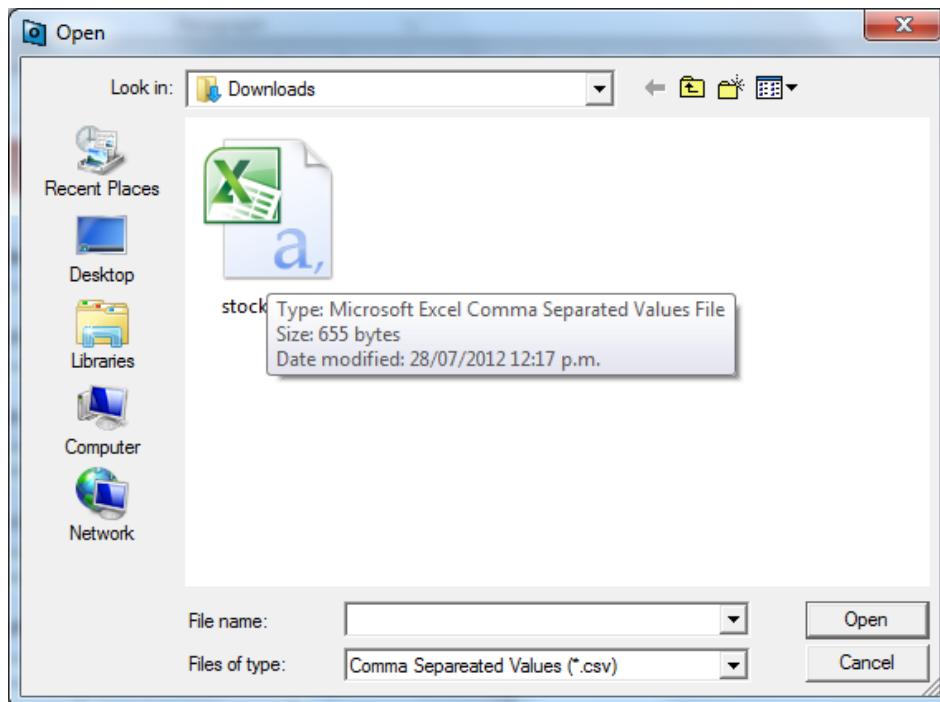
Step 1

From Menumate Office press CTRL ALT Z to activate the Menumate Administration window. The Pin number is 1202. This will display the administration options.



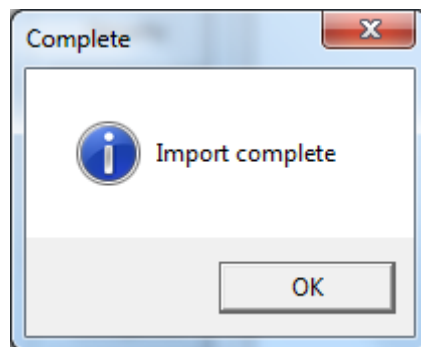
Step 2

Select the Import option and locate and select the CSV file that is being imported.



Step 3

When completed the stock information will have been imported.



NOTE: It is important that every Stock Code (Column 3) is unique!

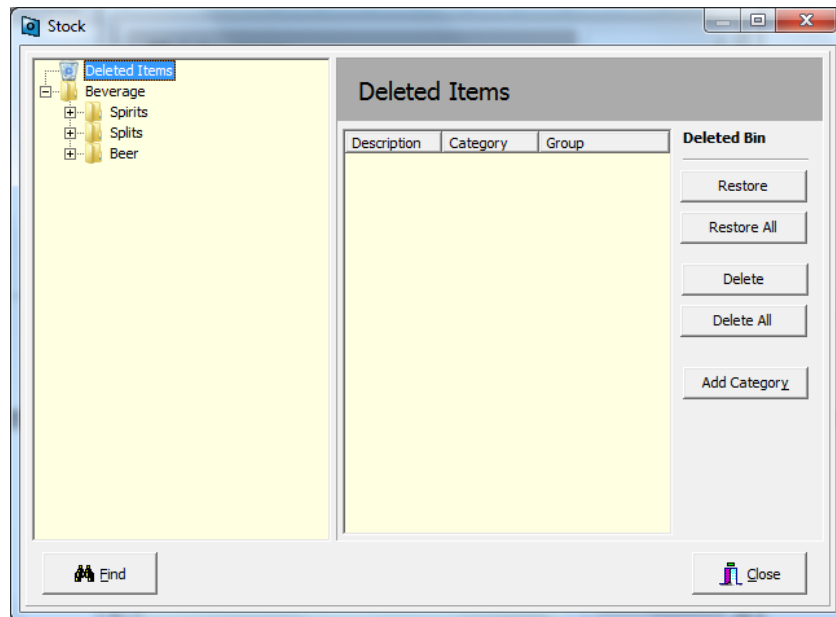
Step 4

Click CLOSE to complete the administration window.

Importing Stock Results

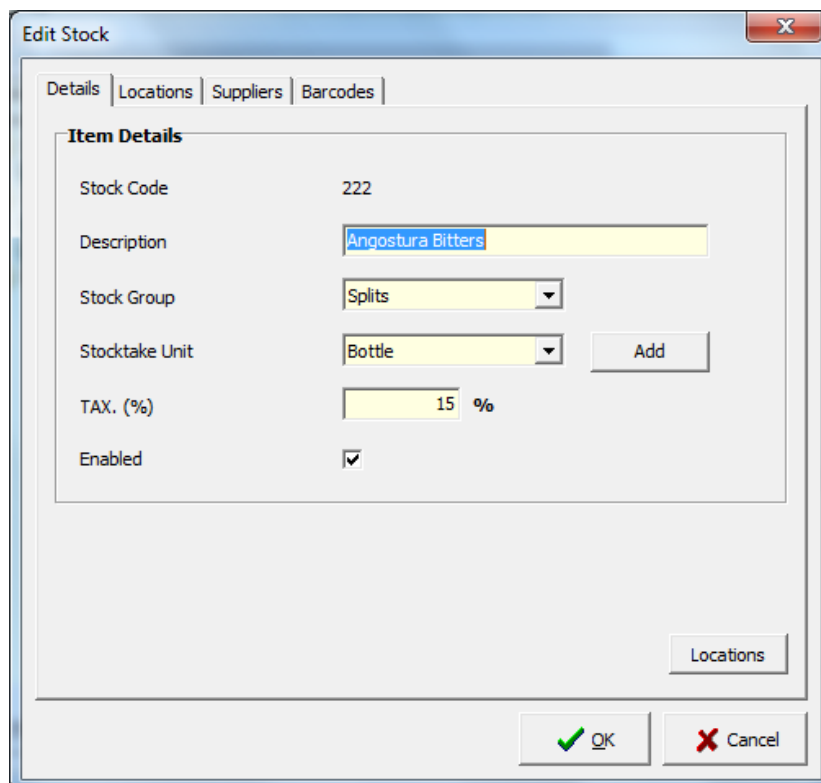
Categories and Groups

The Categories and Groups in the CSV file will be created in Menumate Office by the importer.



Stock Details

The Stock Details in the CSV file will be created in Menumate Office by the importer.



Location Details

The Location Details in the CSV file will be created in Menumate Office by the importer.

The screenshot shows the 'Edit Stock' dialog box with the 'Locations' tab selected. The 'Locations' section contains a list with one entry, 'Bar'. To the left of the list are buttons for 'Add Location' and 'Delete Location', and a checkbox for 'Default Location' which is unchecked. Below the list are several input fields: 'Minimum Level' (2), 'Maximum Level' (10), 'Latest Cost (excl TAX)' (\$19.13), 'Average Cost (excl TAX)' (\$18.96), and 'Assessed Sale Value' (\$0.00). The units for these fields are 'Bottle' for the levels and costs, and 'inc.' for the assessed sale value. At the bottom, there are 'On Hand' and 'On Order' fields, both set to 0. The dialog also has 'Details' and 'Suppliers' buttons, and 'OK' and 'Cancel' buttons at the very bottom.

Suppliers Details

The Suppliers Details in the CSV file will be created in Menumate Office by the importer.

The screenshot shows the 'Edit Stock' dialog box with the 'Suppliers' tab selected. The 'Stock Suppliers' section contains a list with one entry, '8 Ranges Winery'. To the left of the list are buttons for 'Add Supplier' and 'Remove Supplier', and a checked checkbox for 'Preferred Supplier'. Below the list is a text block explaining the units: 'These are the units you will order from your suppliers. The Stock Quantity field is the number of Stocktake Units this will order.' This is followed by an example: 'e.g. [Dozen] = [12] Stubbies' and '[50L Keg] = [50] Litres'. Below this is an 'Order Unit' section with a list containing 'Each'. To the right of the list are input fields for 'Stock Quantity' (1), 'Cost Exc. TAX' (\$20.00), 'Supplier Code' (A12345), and 'Min Order Qty' (1). The units for these fields are 'Bottle', 'Each', and 'Each' respectively. There is also a 'Default Order Unit' checkbox which is checked. At the bottom, there are 'Add Unit' and 'Delete Unit' buttons, and 'OK' and 'Cancel' buttons at the very bottom.

Barcode Details

The Barcode Details in the CSV file will be created in Menumate Office by the importer.

