

This document describes how to create an article list, and import that list into Windfall NG.

## Create an Article List

If you have a large number of articles to import into Windfall, you can create a Microsoft Excel spreadsheet with all of your items and attributes.

1. Create a new excel document, and add any desired attributes to the first row.
2. Fill in all fields for which you have a value.
3. Save the spreadsheet as \_\_\_\_\_.

	A	B	C	D	E	F	G
1	ARTICLE NUMBER	PART NUMBER	CATEGORY	TYPE	CLASS	DESCRIPTION	DESCRIPTION
2	RT-01	RT-01	HOTEL	DÉCOR	HOTEL	Boat Painting	Boat Painting
3	RT-02	RT-02	HOTEL	DÉCOR	HOTEL	Sunset Painting	Sunset Painting
4	RT-03	RT-03	HOTEL	DÉCOR	HOTEL	Paperweight	Paperweight
5	RT-04	RT-04	HOTEL	DÉCOR	HOTEL	Tapestry (blue)	Tapestry (blue)
6	RT-05	RT-05	HOTEL	DÉCOR	HOTEL	Tapestry (gold)	Tapestry (gold)
7	RT-06	RT-06	HOTEL	DÉCOR	HOTEL	Roman Bust	Roman Bust
8	MX-001	MX-001	HOTEL	TOILETRIES	HOTEL	Shampoo	Shampoo
9	MX-002	MX-002	HOTEL	TOILETRIES	HOTEL	Soap	Soap
10	MX-003	MX-003	HOTEL	TOILETRIES	HOTEL	Toilet Paper	Toilet Paper
11	MX-004	MX-004	HOTEL	TOILETRIES	HOTEL	Conditioner	Conditioner
12	QE-001	QE-001	HOTEL	FURNITURE	HOTEL	Writing Desk	Writing Desk
13	QE-002	QE-002	HOTEL	FURNITURE	HOTEL	Office Chair	Office Chair
14	QE-003	QE-003	HOTEL	FURNITURE	HOTEL	Sitting Chair	Sitting Chair
15	QE-004	QE-004	HOTEL	FURNITURE	HOTEL	Bed Frame	Bed Frame
16	QE-005	QE-005	HOTEL	FURNITURE	HOTEL	Box Spring	Box Spring
17	QE-006	QE-006	HOTEL	FURNITURE	HOTEL	Headboard	Headboard
18	QE-007	QE-007	HOTEL	FURNITURE	HOTEL	Bedside Table	Bedside Table
19	QE-008	QE-008	HOTEL	FURNITURE	HOTEL	TV Console	TV Console
20	QE-009	QE-009	HOTEL	FURNITURE	HOTEL	Dresser	Dresser
21	QE-010	QE-010	HOTEL	FURNITURE	HOTEL	Vanity	Vanity
22	QE-011	QE-011	HOTEL	FURNITURE	HOTEL	Floor Lamp	Floor Lamp
23	QE-012	QE-012	HOTEL	FURNITURE	HOTEL	Table Lamp	Table Lamp

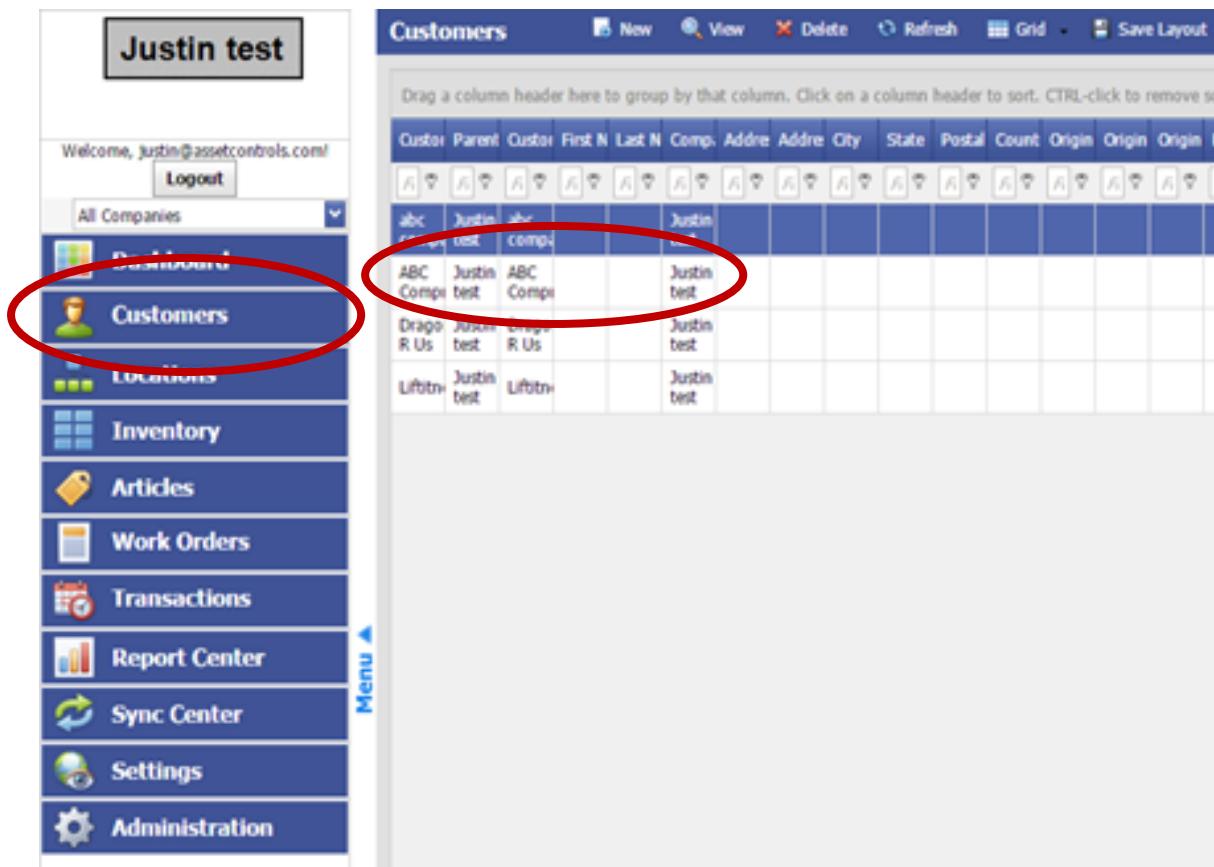
*fig. 1: Example Spreadsheet*

Note: The attribute fields are customizable in Windfall NG. Please reach out to Asset Controls for the setup guide if any help is needed.

## Import an Article List

When you are ready to import your spreadsheet, login to Windfall.

1. Click on the “Customers” tab on the left side of the screen, then double click on the customer that you will be adding articles to. The details screen of the customer will appear.

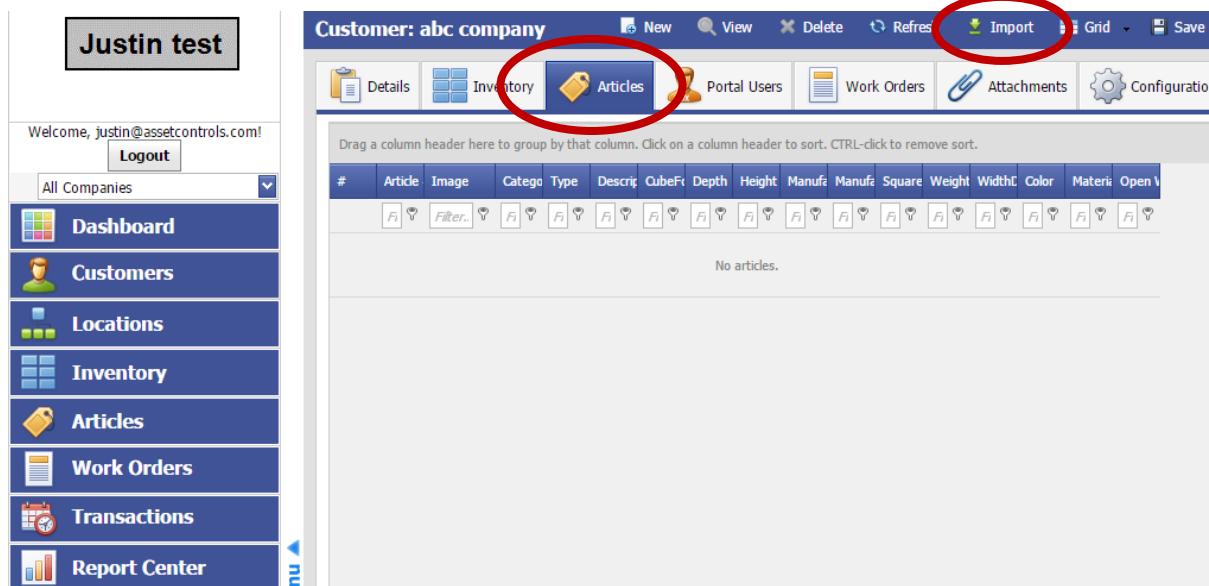


The screenshot shows the Windfall Commercial software interface. On the left, a sidebar menu lists various options: Dashboard, Customers (which is circled in red), Locations, Inventory, Articles, Work Orders, Transactions, Report Center, Sync Center, Settings, and Administration. The main area is titled "Customers" and contains a grid of customer data. The first row of the grid is also circled in red and highlighted with a blue background. The grid columns include Customer, Parent, Customer, First N, Last N, Comp, Addre, Addre, City, State, Postal, Count, Origin, Origin, Origin, and P. The data in the first row is as follows:

Customer	Parent	Customer	First N	Last N	Comp	Addre	Addre	City	State	Postal	Count	Origin	Origin	Origin
abc	Justin	abc	abc	comp				Justin						
ABC	Justin	ABC	ABC	Compi				Justin						
Drago	Justin	Drago	Drago	R Us				Justin						
R Us	test	R Us	R Us					test						
Liftn	Justin	Liftn	Liftn					test						

fig. 2: Customer Selection Screen

2. From this screen, click the “Articles” tab, then click “Import” at the top of the screen. The “Import Articles” window will pop up.



The screenshot shows the Windfall Commercial application. On the left is a sidebar with a user profile for 'Justin test' and a 'Logout' button. Below that is a list of navigation items: Dashboard, Customers, Locations, Inventory, Articles (which is the active tab, indicated by a red circle), Work Orders, Transactions, and Report Center. The main content area is titled 'Customer: abc company' and shows a table with columns for #, Article, Image, Category, Type, Description, Cube Feet, Depth, Height, Manufacturer, Square Feet, Weight, Width, Color, Material, and Open. A message at the top of the table says 'Drag a column header here to group by that column. Click on a column header to sort. CTRL-click to remove sort.' Below the table, it says 'No articles.'

fig. 3: Articles Screen

3. From the “Import Articles” window, click the “Browse” button and find your excel spreadsheet. Click on your spreadsheet, and click “Open”

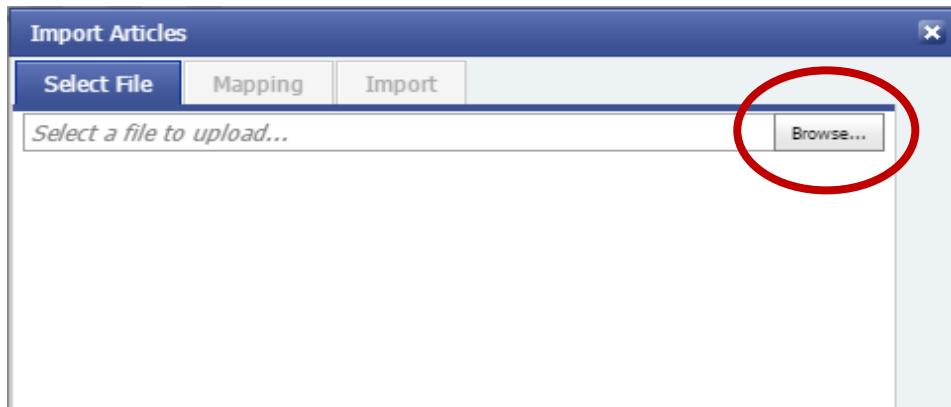
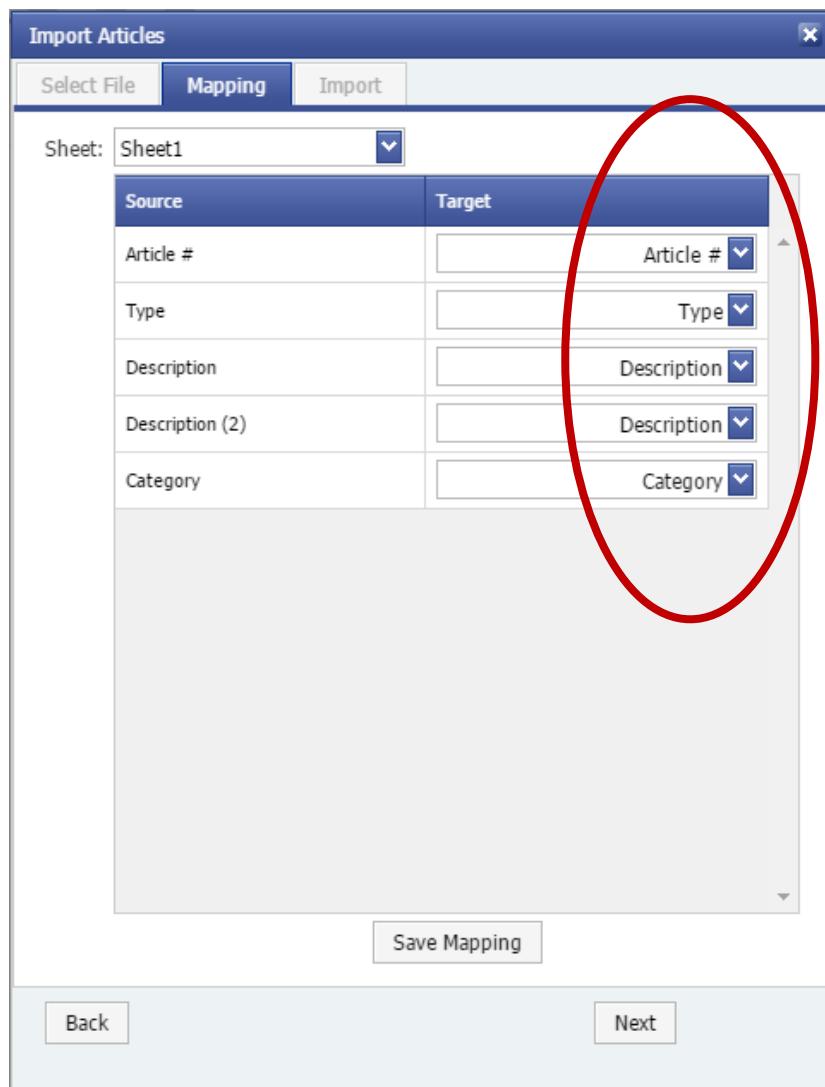


fig. 4: Article Import Window

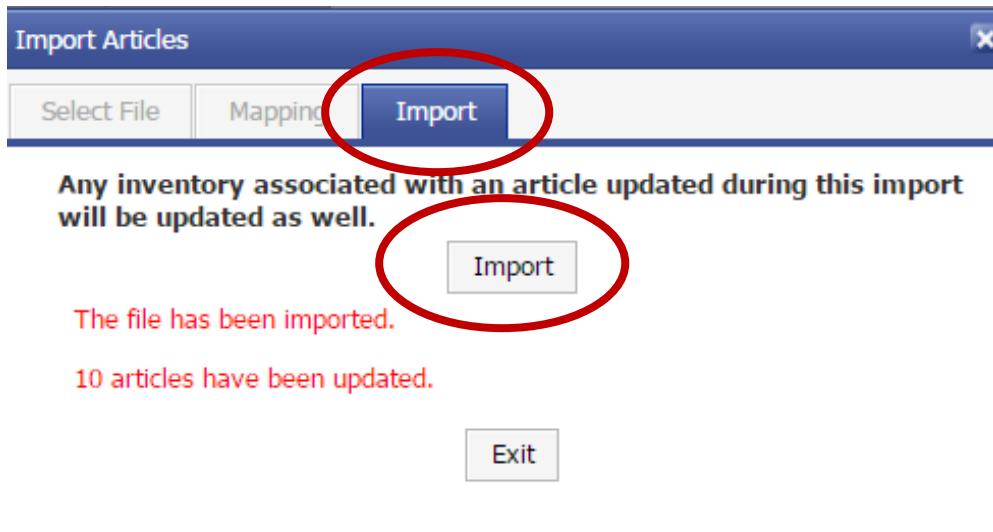
4. Select “Next” at the bottom of the page, and the “Mapping” tab will become available. Select the “Mapping” tab. Windfall will automatically load each box from the first line of your spreadsheet on the left side of this screen.
5. On the right side of this panel, select each target value from the dropdown menu as it corresponds to the source value on the left.



*fig. 5: Selecting Target Values*

6. When all of the target values have been selected, click “Save Mapping”, then click “Next”. The “Import” tab will now become active.

7. Click on the “Import” tab, then click on the “Import” button.



*fig. 6: Confirmation Notice*

8. A confirmation notice will appear stating that the import was successful, and indicating how many articles were imported into windfall. Click “Exit” to exit the article import window. The new articles will now be listed on the screen with any existing articles.