# **Preparing the Import File**

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## Overview

Your import file has columns that are specific to the List that you are going to use. To ensure that the import file will contain the correct set of columns, you need to export the list into your CSV viewer/editor.

The steps for preparing the import file are applicable to:

- **Creating an import file from scratch** The exported CSV file will serve as the template for your import file.
- **Updating and/or inserting new records to the list** If you are changing existing items (update) and/or adding new records to an existing list (insert), you have to start with exporting the list in to a CSV file. Make the necessary changes in the exported CSV file and then, import the file.

### **Preparing the Import File**

From the *Lists* page, you can download a "template" or export the list (to a CSV file) for your import file by using the **Export List to CSV** function.

- 1. Click the *Open Full List* drop-down menu on the left side of your screen.
- 2. Depending on your required Import type, select the corresponding List (e.g. Customers, Vendors, Location). *Note: Move the scrollbar down for more options.*

Order Time Beta	3				
🖀 Home	🏘 Sales	📜 Purchasing	or Production	🕞 Warehouse	🚓 Reports
Create New	~	Sales			
Open Full List	*	Sales	Orders-Trailing 12 mont	hs	
Activities		1.0			
Customers					
★ Leads		0.5			
Contacts		0.0			
Vendors					
Items		-0.5			
Location		-1.0			
🗞 Inventory		Eeb-17	Apr-17 JUN-17 AUG-17	Oct-17 Dec-17	
Bills of Materia	L.	4.2	ter at her		

3. Once you select your List, the List screen will be displayed. Check the column headings on the current screen.

Order Time	eta									O P	roject02	21 (
🖷 Home	🛷 Sales		Purchasing	Q <sub>0</sub> <sup>0</sup> Production	Warehouse	🚓 Reports						
Create New		s	ales + Customers									
			Customers								•	
Open Full List	-											
Recent Record	s		Full Name	\$	Search Customer	Q				O Net	w Custo	omer
Milky Way			ID FULL NAME	COMPANY	BILL ADDRESS STRE	ET BILL ADDRESS CITY	BILL ADDRESS STATE/PROV./REG.	TYPE	SALES REP	CLASS	ACTI	IONS

You can customize the column headings of your import file by modifying the columns:

• Click the **Gear** icon.

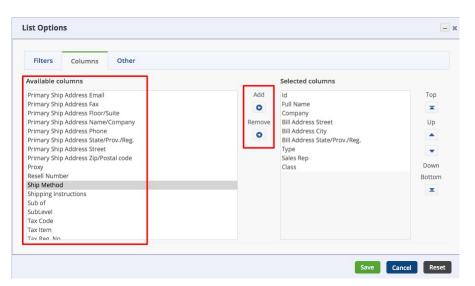
Home	& Sales	🏋 Purchasing	O <sup>®</sup> Production	🗑 Warehouse	🔮 Reports		
Freate New	Ŧ	Sales > Customers					
Open Full List	w	Customers					* 🖯
cent Records		Full Name	\$	Search Customer	Q		New Customer

- Once you click on the Gear icon, the **List Options** screen will be displayed.
- Click the **Columns** tab.
  - Adding Columns: Select the column name under the

*Available Columns* section and click the **>** icon to bring it to

the *Selected Columns* section (Example: Adding the Ship

Method column). *Note:* If you already have an existing list, it is recommended to have the "Id" column added. This will give you the option to live out a required field blank (e.g. Name) when you do the mapping during import.



- Removing Columns: Select the column name from the Selected Columns Section and click < icon.</li>
- Changing Column Order: Select the column name from

the *Selected Columns Section* and press  $\mathbf{\overline{\Lambda}}$  to bring it to the

*top*,  $^{\wedge}$  to move it *up one spot*,  $\mathbf{V}$  icon to move it *down one* 

*spot* or  $\mathbf{Y}$  to bring it all the way to the *bottom*.

Filters Columns Other			
Available columns		Selected columns	_
Primary Ship Address Email Primary Ship Address Fax Primary Ship Address Noor/Suite Primary Ship Address Name/Company Primary Ship Address State/Prov./Reg. Primary Ship Address State/Prov./Reg. Primary Ship Address Zip/Postal code Proxy Resell Number Shipping Instructions	Add Remove	ld Full Name Company Bill Address Street Bill Address City Bill Address State/Prov./Reg. Type Sales Rep Class Ship Method	Top Up Down Bottom
Sub of Sub Level Tax Code Tax Item Tax Reg, No. Tarms			Ĭ

#### • Click **Save**.

4. Once you finalize your column headings, click the **Export List to CSV** icon.

Home	🛷 Sales	Purchasing	00 Production	Warehouse	🖨 Reports		
Create New	~	Sales + Customers					
Open Full List		Customers					\$ ⊕
lecent Record	×.	Full Name	\$	Search Customer		Q	O New Customer

5. Save the file in CSV format.

0180113 - M 🖈 ^ Name	Date modified	Туре	Size	
0171226 - Cr 🖈				
0171223 - CI 🖈				
0170930 - M 🖈				
Cloud Drive 🖈				
00OLYMP				
IC				
hotos				
ative Cloud Fil				
pbox				
eDrive				
File name: Customer_180201				
ave as type: Microsoft Excel Comma Separated Values F	ile			

6. Locate the file from your computer. Open the file in a spreadsheet editor (e.g. Excel, Numbers, OpenOffice) and start preparing your import file by editing it and populating the fields accordingly.

4	Α	В	С	D	E	F	G	н	1	J
ſ	Id	Full Name	Company	Bill Address Street	Bill Address City	Bill Address State/Prov./Reg.	Туре	Sales Rep	Class	Ship Method

7. Save the file in CSV format.

#### **NEXT:** *Importing*

- >> Importing Video Guide
- >> <u>Preparing the Import File</u>
- >> Importing
- >> <u>Sample Import Templates (ZIP)</u>
  - Count Item Import CSV
  - Customer Import CSV
  - **Item Import CSV**
  - **Item Vendor Import CSV**
  - **Vendor Import CSV**