

Import Fields

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Overview

This section contains a list of fields for each import record type in the Import tool. Each record type contains fields where information are stored.

Fields can be mandatory (required) or non-mandatory. Taking note of the mandatory fields allows you to avoid potential issues; and if an issue arises, it aids in resolving the problem. These fields are **required** in the mapping section to successfully run an import job.

You will also notice the Field Types. Where you see Entity Ref, provide the string value as it appears in the drop down. For example, the Type field for the Customer is from the Customer Type profile list. Provide the name of the customer type, which is a string and not its Id.

Note: Custom fields are not listed but they can be imported.

Import Record Types and Import Fields

Below is the list of Import Record Types. ***Click the Import Record Type below to see the rest of its import fields and the properties within that record type.***

- Customer
- Lead
- Vendor
- Contact
- Task
- Log
- Event
- Customer Address

- Vendor Address
- Item Vendors
- Location
- Bin
- Part Item
- Assembly Item
- Job Item
- Service Item
- Other Charge Item
- Kit Item
- Kit Component
- Kit Selection
- Bill of Materials (BOM)
- BOM Step
- BOM Component
- Sales Order
- Quote
- Sales Order Line
- Count Line
- Item Customer
- Non-part Item

Customer

Field Name	Data Type	Required
Name	String	True
Account #	String	False
Active	Boolean	False
Allow Ship Partial	AllowShipPartialEnum	False
ARAccountRef	Entity Ref	False
Bill Address Alt. Contact	String	False
Bill Address Alt. Phone	String	False

Bill Address Care of	String	False
Bill Address City	String	False
Bill Address Contact	String	False
Bill Address Copy changes to customer	Boolean	False
Bill Address Country	String	False
Bill Address Email	String	False
Bill Address Fax	String	False
Bill Address Floor/Suite	String	False
Bill Address Name/Company	String	False
Bill Address Phone	String	False
Bill Address State/Prov./Reg.	String	False
Bill Address Street	String	False
Bill Address Zip/Postal code	String	False
Class	Entity Ref	False
Company	String	False
Credit Card Address	String	False
Credit Card No.	String	False
Credit Card Zip/Postal	String	False
Credit Limit	Decimal	False
Currency	Entity Ref	False
Discount	String	False
Expire Month	Int16	False
ExpYear	Int16	False

FOB	Entity Ref	False
Hold Orders	Boolean	False
Id	Int32	False
Invoice Send Method	SendMethodEnum	False
Name on Card	String	False
Note	String	False
Payment Method	Entity Ref	False
Price Level	Entity Ref	False
Primary Contact First Name	String	False
Primary Contact Last Name	String	False
Primary Contact M.I	String	False
Primary Contact Mr./Ms./...	String	False
Primary Ship Address Alt. Contact	String	False
Primary Ship Address Alt. Phone	String	False
Primary Ship Address Care of	String	False
Primary Ship Address City	String	False
Primary Ship Address Contact	String	False
Primary Ship Address Country	String	False
Primary Ship Address Email	String	False
Primary Ship Address Fax	String	False
Primary Ship Address Floor/Suite	String	False
Primary Ship Address Name/Company	String	False
Primary Ship Address Phone	String	False

Primary Ship Address State/Prov./Reg.	String	False
Primary Ship Address Street	String	False
Primary Ship Address Zip/Postal code	String	False
Proxy	Entity Ref	False
Resell Number	String	False
Sales Rep	Entity Ref	False
Ship Method	Entity Ref	False
Shipping Instructions	String	False
Sub of	String	False
Tax Code	Entity Ref	False
Tax Item	Entity Ref	False
Tax Reg. No.	String	False
Terms	Entity Ref	False
Type	Entity Ref	False
Website	String	False

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Lead

Field Name	Data Type	Required
Name	String	True
Active	Boolean	False
Bill Address Alt. Contact	String	False
Bill Address Alt. Phone	String	False

Bill Address Care of	String	False
Bill Address City	String	False
Bill Address Contact	String	False
Bill Address Copy changes to customer	Boolean	False
Bill Address Country	String	False
Bill Address Email	String	False
Bill Address Fax	String	False
Bill Address Floor/Suite	String	False
Bill Address Name/Company	String	False
Bill Address Phone	String	False
Bill Address State/Prov./Reg.	String	False
Bill Address Street	String	False
Bill Address Zip/Postal code	String	False
Class	Entity Ref	False
Company	String	False
Currency	Entity Ref	False
Discount	Entity Ref	False
FOB	Entity Ref	False
Id	Int32	False
Lead Status	Entity Ref	False
Note	String	False
Price Level	Entity Ref	False
Primary Contact First Name	String	False

Primary Contact Last Name	String	False
Primary Contact M.I	String	False
Primary Contact Mr./Ms./...	String	False
Primary Ship Address Alt. Contact	String	False
Primary Ship Address Alt. Phone	String	False
Primary Ship Address Care of	String	False
Primary Ship Address City	String	False
Primary Ship Address Contact	String	False
Primary Ship Address Country	String	False
Primary Ship Address Email	String	False
Primary Ship Address Fax	String	False
Primary Ship Address Floor/Suite	String	False
Primary Ship Address Name/Company	String	False
Primary Ship Address Phone	String	False
Primary Ship Address State/Prov./Reg.	String	False
Primary Ship Address Street	String	False
Primary Ship Address Zip/Postal code	String	False
Proxy	Entity Ref	False
Resell Number	String	False
Sales Rep	Entity Ref	False
Ship Method	Entity Ref	False
Sub of	String	False
Tax Code	Entity Ref	False

Tax Item	Entity Ref	False
Tax Reg. No.	String	False
Terms	Entity Ref	False
Type	Entity Ref	False
Website	String	False

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Vendor

Field Name	Data Type	Required
Name	String	True
A/P Account	Entity Ref	False
Account #	String	False
Active	Boolean	False
Bill Address Alt. Contact	String	False
Bill Address Alt. Phone	String	False
Bill Address Care of	String	False
Bill Address City	String	False
Bill Address Contact	String	False
Bill Address Copy changes to customer	Boolean	False
Bill Address Country	String	False
Bill Address Email	String	False
Bill Address Fax	String	False
Bill Address Floor/Suite	String	False

Bill Address Name/Company	String	False
Bill Address Phone	String	False
Bill Address State/Prov./Reg.	String	False
Bill Address Street	String	False
Bill Address Zip/Postal code	String	False
Company	String	False
Credit Limit	Decimal	False
Currency	Entity Ref	False
Id	Int32	False
Name on check	String	False
Note	String	False
Primary Contact First Name	String	False
Primary Contact Last Name	String	False
Primary Contact M.I	String	False
Primary Contact Mr./Ms./...	String	False
Proxy	Entity Ref	False
Tax ID	String	False
Terms	Entity Ref	False
Type	Entity Ref	False
Vendor eligible for 1099	Boolean	False

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Contact

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Field Name	Data Type	Required
Customer	Entity Ref	True
Name	String	True
Active	Boolean	False
Address	Entity Ref	False
Email	String	False
Fax	String	False
First Name	String	False
Id	Int32	False
Is Primary	Boolean	False
Last Name	String	False
M.I	String	False
Mr./Ms./...	String	False
Note	String	False
Phone	String	False
Position	String	False

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Task

Field Name	Data Type	Required
Activity Type	Entity Ref	True
Assigned To	Entity Ref	True
Due Date	DateTime	True

Status	Entity Ref	True
Subject	String	True
Contact	Entity Ref	False
Description	String	False
Id	Int32	False
Is Alarmed	Boolean	False
Priority	PriorityEnum	False
Related to Doc No	Int32	False
Related To Entity	Entity Ref	False
Related To Entity Type	RecordTypeEnum	False
Related to Tran Type	RecordTypeEnum	False
Reminder minutes	Int32	False
Reminder Date Time	DateTime	False

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Log

Field Name	Data Type	Required
Activity Type	Entity Ref	True
Assigned To	Entity Ref	True
Due Date	DateTime	True
Subject	String	True
Contact	Entity Ref	False
Description	String	False

Id	Int32	False
Related to Doc No	Int32	False
Related To Entity	Entity Ref	False
Related To Entity Type	RecordTypeEnum	False
Related to Tran Type	RecordTypeEnum	False

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Event

Field Name	Data Type	Required
Activity Type	Entity Ref	True
Assigned To	Entity Ref	True
End Date	DateTime	True
Start Date	DateTime	True
Subject	String	True
All Day	Boolean	False
Contact	String	False
Description	String	False
Id	Int32	False
Is Alarmed	Boolean	False
Related to Doc No	Int32	False
Related To Entity	Entity Ref	False
Related To Entity Type	RecordTypeEnum	False
Related to Tran Type	RecordTypeEnum	False

Reminder minutes	Int32	False
Reminder Date Time	DateTime	False

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Customer Address

Field Name	Data Type	Required
Customer	Entity Ref	True
Name	String	True
Active	Boolean	False
Alt. Contact	String	False
Alt. Phone	String	False
Care of	String	False
City	String	False
Contact	String	False
Country	String	False
Email	String	False
Fax	String	False
Floor/Suite	String	False
Id	Int32	False
Is Primary	Boolean	False
Location	Entity Ref	False
Name/Company	String	False
Phone	String	False

State/Prov./Reg.	String	False
Street	String	False
Tax Code	String	False
Tax Item	String	False
Website	String	False
Zip/Postal code	String	False

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Vendor Address

Field Name	Data Type	Required
Name	String	True
Vendor	Entity Ref	True
Active	Boolean	False
Alt. Contact	String	False
Alt. Phone	String	False
Care of	String	False
City	String	False
Contact	String	False
Country	String	False
Email	String	False
Fax	String	False
Floor/Suite	String	False
Id	Int32	False

Is Primary	Boolean	False
Name/Company	String	False
Phone	String	False
State/Prov./Reg.	String	False
Street	String	False
Zip/Postal code	String	False

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Item Vendors

Field Name	Data Type	Required
Item	Entity Ref	True
Vendor	Entity Ref	True
Cost	Decimal	False
Id	Int32	False
Is default	Boolean	False
Lead Time	Int32	False
Min Order	Int32	False
Order Inc	Int32	False
Part No	String	False
Vendor UPC	String	False

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Location

Field Name	Data Type	Required
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Name	String	True
Active	Boolean	False
Available	Boolean	False
City	String	False
Country	String	False
Floor/Suite	String	False
Id	Int32	False
Name/Company	String	False
Note	String	False
RecordType	RecordTypeEnum	False
State/Prov./Reg.	String	False
Street	String	False
Zip/Postal code	String	False

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Bin

Field Name	Data Type	Required
Location	Entity Ref	True
Name	String	True
Active	Boolean	False
Available	Boolean	False
Id	Int32	False
Is default	Boolean	False

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Part Item

Field Name	Data Type	Required
Asset Account	Entity Ref	True if no Group is provide
COGS Account	Entity Ref	True if no Group is provide
Group	Entity Ref	True
Income Account	Entity Ref	True if no Group is provide
Name	String	True
UOM	Entity Ref	True if no Group is provide
UOM Set	Entity Ref	True If enabled and if no Group is provide
Active	Boolean	False
Bin	Entity Ref	False
Class	Entity Ref	False
Description	String	False
Id	Int32	False
Manufacturer	Entity Ref	False
Manufacturer Part No.	String	False
Max Qty	Decimal	False
Note	String	False
Price	Decimal	False
Price Level	Entity Ref	False

Proxy	Entity Ref	False
Purchase Description	String	False
Reorder Amount	Decimal	False
Reorder Point	Decimal	False
Std. Cost	Decimal	False
Sub of	String	False
Tax Code	String	False
Track lots or serial numbers	Boolean	False
UPC	String	False
Volume	Decimal	False
Warranty	Entity Ref	False
Weight	Decimal	False

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Assembly Item

Field Name	Data Type	Required
Asset Account	Entity Ref	True
COGS Account	Entity Ref	True
Group	Entity Ref	True
Income Account	Entity Ref	True
Name	String	True
UOM	Entity Ref	True
UOM Set	Entity Ref	True

Active	Boolean	False
Bin	Entity Ref	False
Build Amount	Decimal	False
Build Point	Decimal	False
Class	String	False
Description	String	False
Id	Int32	False
Make lead time	Decimal	False
Manufacturer	Entity Ref	False
Manufacturer Part No.	String	False
Max Qty	Decimal	False
Note	String	False
Price	Decimal	False
Price Level	Entity Ref	False
Proxy	Entity Ref	False
Purchase Description	String	False
Std. Cost	Decimal	False
Sub of	String	False
Tax Code	String	False
Track lots or serial numbers	Boolean	False
UPC	String	False
Volume	Decimal	False
Warranty	Entity Ref	False

Weight	Decimal	False
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Job Item

Field Name	Data Type	Required
Expense Account	Entity Ref	True
Group	Entity Ref	True
Income Account	Entity Ref	True
Name	String	True
UOM	Entity Ref	True
UOM Set	Entity Ref	True
Active	Boolean	False
Class	Entity Ref	False
Description	String	False
Id	Int32	False
Note	String	False
Price	Decimal	False
Price Level	Entity Ref	False
Proxy	Entity Ref	False
Purchase Description	String	False
Std. Cost	Decimal	False
Sub of	String	False
Tax Code	String	False

Volume	Decimal	False
Weight	Decimal	False

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Service Item

Field Name	Data Type	Required
Expense Account	Entity Ref	True
Group	Entity Ref	True
Income Account	Entity Ref	True
Name	String	True
UOM	Entity Ref	True
UOM Set	Entity Ref	True
Active	Boolean	False
Class	Entity Ref	False
Description	String	False
Id	Int32	False
Note	String	False
Price	Decimal	False
Price Level	Entity Ref	False
Proxy	String	False
Purchase Description	String	False
Std. Cost	Decimal	False
Sub of	String	False

Tax Code	String	False
Volume	Decimal	False
Weight	Decimal	False

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Other Charge Item

Field Name	Data Type	Required
Expense Account	Entity Ref	True
Group	Entity Ref	True
Income Account	Entity Ref	True
Name	String	True
UOM	Entity Ref	True
UOM Set	Entity Ref	True
Active	Boolean	False
Class	String	False
Description	String	False
Id	Int32	False
Note	String	False
Price	Decimal	False
Price Level	Entity Ref	False
Proxy	Entity Ref	False
Purchase Description	String	False
Std. Cost	Decimal	False

Sub of	String	False
Tax Code	String	False
Volume	Decimal	False
Weight	Decimal	False

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Kit Item

Field Name	Data Type	Required
Group	Entity Ref	True
Name	String	True
UOM	Entity Ref	True
Active	Boolean	False
Description	String	False
Id	Int32	False
Note	String	False
Price	Decimal	False
Proxy	Entity Ref	False
Sub of	String	False

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Kit Component

Field Name	Data Type	Required
Item	Entity Ref	True
Name	String	True

Type	KitCompTypeEnum	True
Active	Boolean	False
Description	String	False
Id	Int32	False

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Kit Selection

Field Name	Data Type	Required
Kit Component	Entity Ref	True
Item	Entity Ref	True
Active	Boolean	False
Description	String	False
Is default	Boolean	False
Is Optional	Boolean	False
One Time	Boolean	False
Price Per	Decimal	False
Qty Per	Decimal	False

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Bill of Materials (BOM)

Field Name	Data Type	Required
Id	Int32	False
Instructions	String	True

Item	Entity Ref	True
Is a phantom bill of materials	Boolean	False
UOM	String	False

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BOM Step

Field Name	Data Type	Required
BOMId	Int32	True
Step	Entity Ref	True
UOM	Entity Ref	True
Active	Boolean	False
Description	String	False
Id	Int32	False
Time	Decimal	False

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BOM Component

Field Name	Data Type	Required
BOMStepId	Int32	True
Item	Entity Ref	True
Active	Boolean	False
Costed	Boolean	False
Description	String	False
Id	Int32	False

Line Instructions	String	False
One Time	Boolean	False
Qty Per	Decimal	False

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Sales Order

Field Name	Data Type	Required
Customer	Entity Ref	True
Ship To	Entity Ref	True
Allow Ship Partial	Boolean	False
Bill Address Alt. Contact	String	False
Bill Address Alt. Phone	String	False
Bill Address Care of	String	False
Bill Address City	String	False
Bill Address Contact	String	False
Bill Address Country	String	False
Bill Address Email	String	False
Bill Address Fax	String	False
Bill Address Floor/Suite	String	False
Bill Address Name/Company	String	False
Bill Address Phone	String	False
Bill Address State/Prov./Reg.	String	False
Bill Address Street	String	False

Bill Address Website	String	False
Bill Address Zip/Postal code	String	False
Class	Entity Ref	False
Contact	Entity Ref	False
Currency	Entity Ref	False
Customer PO	String	False
Date	DateTime	False
Discount	Entity Ref	False
Discount \$	Decimal	False
Discount Sales Tax	String	False
Exchange Rate	Decimal	False
FOB	String	False
Internal Notes	String	False
Location	Entity Ref	False
Memo	String	False
No.	Int32	False
On credit hold	Boolean	False
Order Source	Entity Ref	False
Promise Date	DateTime	False
Sales Rep	Entity Ref	False
Ship Address Alt. Contact	String	False
Ship Address Alt. Phone	String	False
Ship Address Care of	String	False

Ship Address City	String	False
Ship Address Contact	String	False
Ship Address Country	String	False
Ship Address Email	String	False
Ship Address Fax	String	False
Ship Address Floor/Suite	String	False
Ship Address Name/Company	String	False
Ship Address Phone	String	False
Ship Address State/Prov./Reg.	String	False
Ship Address Street	String	False
Ship Address Website	String	False
Ship Address Zip/Postal code	String	False
Ship Amount	Decimal	False
Ship Method	Entity Ref	False
Ship Sales Tax Code	Entity Ref	False
Shipping Instructions	String	False
Status	Entity Ref	False
Tax Item	Entity Ref	False
Terms	Entity Ref	False

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Quote

Field Name	Data Type	Required

Customer	Entity Ref	True
Ship To	Entity Ref	True
Bill Address Alt. Contact	String	False
Bill Address Alt. Phone	String	False
Bill Address Care of	String	False
Bill Address City	String	False
Bill Address Contact	String	False
Bill Address Country	String	False
Bill Address Email	String	False
Bill Address Fax	String	False
Bill Address Floor/Suite	String	False
Bill Address Name/Company	String	False
Bill Address Phone	String	False
Bill Address State/Prov./Reg.	String	False
Bill Address Street	String	False
Bill Address Website	String	False
Bill Address Zip/Postal code	String	False
Class	Entity Ref	False
Contact	Entity Ref	False
Currency	Entity Ref	False
Customer PO	String	False
Date	DateTime	False
Discount	Entity Ref	False

Discount \$	Decimal	False
Discount Sales Tax	Entity Ref	False
Exchange Rate	Decimal	False
FOB	String	False
Internal Notes	String	False
Location	Entity Ref	False
Memo	String	False
No.	Int32	False
Promise Date	DateTime	False
Sales Rep	Entity Ref	False
Ship Address Alt. Contact	String	False
Ship Address Alt. Phone	String	False
Ship Address Care of	String	False
Ship Address City	String	False
Ship Address Contact	String	False
Ship Address Country	String	False
Ship Address Email	String	False
Ship Address Fax	String	False
Ship Address Floor/Suite	String	False
Ship Address Name/Company	String	False
Ship Address Phone	String	False
Ship Address State/Prov./Reg.	String	False
Ship Address Street	String	False

Ship Address Website	String	False
Ship Address Zip/Postal code	String	False
Ship Amount	Decimal	False
Ship Method	Entity Ref	False
Ship Sales Tax Code	Entity Ref	False
Status	Entity Ref	False
Tax Item	String	False
Terms	Entity Ref	False

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Sales Order Line

Field Name	Data Type	Required
DocNo	Int32	True
Item	Entity Ref	True
Tran Type	RecordTypeEnum	True
Cleared	Boolean	False
Customer	String	False
Customer Part No	String	False
Customer PO	String	False
Description	String	False
Id	Int32	False
Line Instructions	String	False
Price	Decimal	False

Quantity	Decimal	False
Std. Cost	Decimal	False
Std. Price	Decimal	False
Tax Code	Entity Ref	False

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Count Line

Count Lines can be updated using the count line Id

Field Name	Data Type	Required
Id	Int32	True
Quantity counted	Decimal	True

You can also add and update count line as follows

Field Name	Data Type	Required
Item	String	True
Bin	String	True
Lot or Serial No.	String	True Enter NA when you item does not have lot or serial # tracking
Quantity counted	Decimal	True
Doc No	Int32	True (the Count Doc No)

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Item Customer

Field Name	Data Type	Required
Customer	Entity Ref	True
Customer Part No	String	True
Id	Int32	False
Item	Entity Ref	True
Note	String	False

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Non-part Item

Field Name	Data Type	Required
Expense Account	Entity Ref	True
Group	String	True
Income Account	Entity Ref	True
Name	String	True
UOM	Entity Ref	True
UOM Set	Entity Ref	True
Active	Boolean	False
Class	Entity Ref	False
Description	String	False
Id	Int32	False
Manufacturer	Entity Ref	False
Manufacturer Part No.	String	False

Note	String	False
Price	Decimal	False
Price Level	Entity Ref	False
Proxy	Entity Ref	False
Purchase Description	String	False
Std. Cost	Decimal	False
Sub of	String	False
Tax Code	Entity Ref	False
UPC	String	False
Volume	Decimal	False
Weight	Decimal	False

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