Importing Tips

Last Modified on 09/17/2025 7:08 pm EDT

Importing Tips

Templates:

Here is a Zip file with all the templates we have built over time. These templates have many of the more common fields but not all the available fields for each import type.

Order Time Import Templates.zip

We do strongly recommend creating your own templates. The best practice is to manually create one record type of the record you are trying to import. Lets use Part type Items as an example. Create an Item by hand. Fill in all the fields you need. Add custom fields if needed and then go back to the item and add that data. Then on the Items list Add ALL of the columns you used when setting up the item to your list view. Then Export that list view not only creating a template but creating it with data of one of your items. This makes it easier to fill in for the rest of the items.

Updating Lists:

You can use the ID Method to update Items, Customers and Vendor Lists. You can also update Transactions and Transaction lines using the same method.

This video gives a basic example of putting the ID Method to work:

Video - Updating the Items List with Imports

Keep in mind Depending on WHERE you are trying to update as to which ID to use. To update Sales Order Line Items you need the Line Item ID. And the MOST common mistake is trying to update a Count using the ITEM Id instead of the Count line ID. The Count Line ID is the UNIQUE ID for that Line with that Item and that Serial number in that Bin on that Count. Here is a Video showing how to get that Count line ID:

Webinar - Inventory Counts for the New Year