

Import Wizard Screen - How To's

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Overview

Use the **Import Wizard** to import new records or update existing records using Microsoft Excel templates.

The available **Import Types** depend on the screen where the Import Wizard is opened.

Accessing the Import Wizard

1. Open a module that supports importing.

The **Import Wizard** is available from the following modules and screens in 1place.

Module	Screen	Available Import Types
Customers	Customer List	Customers, Customer Contacts, Customer Custom Pricing, Customer Custom Pricing Templates, Customer API 3rd Party Mapping, Customers Merge
	Vendor List	Vendors, Vendor Contacts
Items	Item List	Item List, Item Quantity in Stock, Item Price Levels, Item Search Catalog, Item Bundle (Assembly) Components, Vendor Item Numbers (All Vendors), Vendor Item Numbers (1 Vendor), Sales Order Line Items (for 1 Order), Item Cross Reference
Sales	Quotes	Quotation Headers, Quotation Line Items
Sales	Sales Orders	Sales Order Headers (Unshipped), Sales Order Line Items (Unshipped), Sales Order Header + Lines (1 File), Sales Order Line Items (for 1 Order)
Sales	Invoices & Credits	Invoice & Credit Memo Headers, Invoice & Credit Memo Line Items, Invoice & Credit Memo Payments, Invoice & Credit Memo (Receive Payments Screen)
Purchasing	Purchase Orders	Purchase Order Headers, Purchase Order Line Items
Warehouse	Bin Management	(This will be updated soon.)

Note: The Import Wizard is not available in the **Accounts Receivable (AR)**, **Documents**, or **Reports** modules.

2. Click the Upload to 1place button.

The Import Wizard opens.

Step 1 - Select an Import Type

1. Open the **Import Type** list.
2. Select the data you want to import.

Each module provides different Import Types.

Examples include:

Customers

- **Customers (Map Columns)**

Database Columns	Special Instructions	Data Type	Field Length
CustomerNumber	(REQUIRED). This is a unique number or code assigned to track Customer records.	text	50
AddressType	There are 3 acceptable values: 'Both (Bill To & Ship To)', or 'Bill To', or 'Ship To'.	text	50
IsSubCustomer	This is a boolean value. Is the Customer a sub-customer or not? (Acceptable values are 'Yes', 'True' or '1' if affirmative and 'No', 'False' or '0' if negative.)	Yes/No	0
ParentCustomer	This is the Parent Customer value for Customer.	text	50
Active	This is a boolean value. Is the Customer active or not? (Acceptable values are 'Yes', 'True' or '1' if affirmative and 'No', 'False' or '0' if negative.)	Yes/No	0
Company	(REQUIRED). This is the Company Name of the Customer. (The value must be unique.)	text	150
Prefix	This is Prefix value for Customer.	text	50
FirstName	This is First Name for Customer.	text	50
LastName	This is Last Name for Customer.	text	50
Title	This is Title value for Customer.	text	50
Street	This is Street value for Customer.	text	250
Suite	This is Suite value for Customer.	text	50
City	This is City value for Customer.	text	50
State	This is State value for Customer.	text	50
ZipCode	This is ZipCode value for Customer.	text	50
Region	This is Region value for Customer.	text	50
Country	This is Country value for Customer.	text	50
Phone	This is Phone value for Customer.	text	50
PhoneExt	This is Phone Ext value for Customer.	text	50
Fax	This is Fax value for Customer.	text	50
CustomerType	This is Customer Type value for Customer.	text	50
CustomerSubType	This is Customer SubType value for Customer.	text	50
Status	This is Status value for Customer.	text	50
CompanyEmail	This is Company Email value for Customer.	text	50
CompanyWebsite	This is Company Website value for Customer.	text	100
AccountRep	This is AccountRep for Customer.	text	50
Salesperson	This is Sales person for Customer.	text	50
ShippedVia	This is Shipped Via value for Customer.	text	50
...	...	...	...

Warehouse	This is Warehouse value for Customer.	text	50
DefaultPricing	This is Default Pricing value for Customer.	text	150
DefaultPricingDiscount	This is Default Pricing Discount value for Customer.	decimal	0
DefaultPricingMarkup	This is Markup value for Customer.	decimal	0
DefaultPricingMultiplier	This is Multiplier value for Customer.	decimal	0
DefaultPricingCode	This is Pricing Code value for Customer.	text	50
PaymentTerms	This is Payment Terms value for Customer.	text	50
PaymentMethod	This is Payment Method value for Customer.	text	50
CreditLimit	This is Credit Limit value for Customer.	text	50
CreditDays	This is Credit Days value for Customer.	small number	0
TaxExempt	This is TaxExempt value for Customer.	Yes/No	0
TaxExemptNum	This is Tax ExemptNum value for Customer.	text	50
FedTaxId		text	50
CreatedDate	This is Created Date value for Customer.	date	0
CreatedBy	This is a value to store who will create a Customer.	text	50
ModifiedDate	This is Modified Date value for Customer.	date	0
ModifiedBy	This is a value to store who will update a Customer.	text	50
QBOSync	This is QBO Sync(boolean) value for Customer.	Yes/No	0
ReceivablesNotes	This is Receivables Notes value for Customer.	text	10,000
InternalNotes	This is Internal Notes value for Customer.	text	10,000
FreightNotes	This is Freight Notes value for Customer.	text	10,000
SICCode	This is SICCode value for Customer.	text	255
LastCampaignDate	This is Last Campaign Date value for Customer.	date	0
LastCampaignMethod	This is Last Campaign Method value for Customer.	text	255
LastCampaignPiece	This is Last Campaign Piece value for Customer.	text	255
NextCampaignMethod	This is Next Campaign Method value for Customer.	text	255
NextCampaignPiece	This is Next Campaign Piece value for Customer.	text	255
LastContactDate	This is Last Contact Date value for Customer.	date	0
LastContacted	This is Last Contacted value for Customer.	text	255
LastContactBy	This is Last ContactBy value for Customer.	number	0
NextContactDate	This is Next Contact Date value for Customer.	date	0
NextContactBy	This is Next ContactBy value for Customer.	number	0

- **Customer Contacts (Map Columns)**

Database Columns	Special Instructions	Data Type	Field Length
CustomerNumber		text	150
PrimaryContact	This is a boolean type data. This is used to make a contact to PrimaryContact for Customer.	Yes/No	0
FirstName	This is First name for the contact.	text	25
LastName	This is Last name for the contact.	text	25
ContactType	This is Contact Type for the contact.	text	50
Email	This is Mail address for the contact.	text	50
WorkPhoneDirLine	This is Work Phone Directory Line for the contact.	text	50
PhoneOther	This is Phone Number for the contact.	text	50
WorkFax	This is Fax Number for the contact.	text	50
CellPhone	This is Cell Phone Number for the contact.	text	50
PagerPhone	This is Pager Number for the contact.	text	50
HomePhone	This is Home Number for the contact.	text	50
Birthday	This is Birthday date for the contact.	date	0
ContactNotes	This is Notes for the contact.	text	10000

- **Customer Custom Pricing (Map Columns)**

Database Columns	Special Instructions	Data Type	Field Length
CustomerID	(REQUIRED). This is Customer number or Customer Company Name for the customer.	text	150
PricingTemplatesID	This is a Pricing Templates Name.	text	150
ItemID	This is a Item Number.	text	150
PricingCategoryID	This is Pricing Category for the Customer Pricing Line Item.	text	150
PriceLevel	This is Price Level for the Customer Pricing Line Item.	text	150
QtyLow	This is Qty Low value for the Customer Pricing Line Item.	real	0
QtyHigh	This is Qty High value for the Customer Pricing Line Item.	real	0
Discount	This is Discount for the Customer Pricing Line Item.	decimal	0
Markup	This is Markup value for the Customer Pricing Line Item.	decimal	0
Multiplier	This is Multiplier value for the Customer Pricing Line Item.	decimal	0
SpecificPrice	This is Specific Price for the Customer Pricing Line Item.	decimal	0
Lock	This is a boolean type data. This is used to Lock for Customer Pricing Line Item.	Yes/No	0

- **Customer Custom Pricing Templates**

Database Columns	Special Instructions	Data Type	Field Length
GroupName	(REQUIRED). This is GroupName for the customer.	text	50
Description	This is a Description.	text	255
ItemNumber	This is a Item Number.	text	150
PricingCategoryID	This is Pricing Category for the Customer Pricing Line Item.	text	150
PriceLevel	This is Price Level for the Customer Pricing Line Item.	text	255
QtyLow	This is Qty Low value for the Customer Pricing Line Item.	real	0

QtyHigh	This is Qty High value for the Customer Pricing Line Item.	real	0
Discount	This is Discount for the Customer Pricing Line Item.	real	0
Markup	This is Markup value for the Customer Pricing Line Item.	real	0
Multiplier	This is Multiplier value for the Customer Pricing Line Item.	Decimal	0
SpecificPrice	This is Specific Price for the Customer Pricing Line Item.	money	0

- **Customer API 3rd Party Mapping**

Database Columns	Special Instructions	Data Type	Field Length
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CustomerID		nvarchar	150
ThirdPartType		nvarchar	150
ItemNumber		nvarchar	150

- **Customers Merge**

Vendors

- **Vendors (Map Columns)**

Database Columns	Special Instructions	Data Type	Field Length
VendorNumber	(REQUIRED). This is a Vendor Number.	text	50
Active	This is Active value(boolean) for Vendor.	Yes/No	0
PoType	This is a Vendor POType.	text	50
VendorAccountNumber	This is Vendor Account Number for the Vendor.	text	50
VendorName	(REQUIRED). This is a Vendor Name.	text	50
Salutation	This is Salutation for Vendor.	text	50
FirstName	This is First Name for Vendor.	text	50
LastName	This is Last Name for Vendor.	text	50
Title	This is Title for vendor.	text	50
Street	This is Street value for Vendor.	text	255
Suite	This is Suite value for Vendor.	text	50
City	This is City value for Vendor.	text	50
State	This is State value for Vendor.	text	25
PostalCode	This is Postal Code value for Vendor.	text	75
Country	This is Country for Vendor.	text	50
Phone	This is Phone Number value for Vendor.	text	30
Fax	This is Fax Number for Vendor.	text	30
PaymentTerms	This is Payment Terms for Vendor.	text	150
CreditLimit	This is Credit Limit for Vendor.	money	0
ProductsServices	This is Products Services for Vendor.	text	255
SICCode	This is SIC Code for Vendor.	number	0
EmailAddressCompany	This is Email Address for Vendor.	text	100
CreatedDate	This is Created Date for Vendor.	date	0
CreatedBy	This is a value to store who will create a Vendor.	text	50
ModifiedDate	This is Modified Date for Vendor.	date	0
ModifiedBy	This is a value to store who will update a Vendor.	text	50
QBOSync	This is QBO Sync for Vendor.	Yes/No	0
Comments	This is Comments value for Vendor.	text	10000

- **Vendor Contacts (Map Columns)**

Database Columns	Special Instructions	Data Type	Field Length
VendorID	(REQUIRED). This is Vendor Number or Vendor Name for the contact.	text	150
PrimaryContact	This is a boolean type data. This is used to make a contact to PrimaryContact for Vendor.	Yes/No	0
FirstName	This is First name for the contact.	text	25
LastName	This is Last name for the contact.	text	25
ContactType	This is Contact Type for the contact.	text	50
Email	This is Mail address for the contact.	text	50
WorkPhoneDirLine	This is Work Phone Directory Line for the contact.	text	15
PhoneOther	This is Phone Number for the contact.	text	15
WorkFax	This is Fax Number for the contact.	text	15
CellPhone	This is Cell Phone Number for the contact.	text	15
PagerPhone	This is Pager Number for the contact.	text	15
HomePhone	This is Home Phone Number for the contact.	text	15
ContactNotes	This is Notes for the contact.	text	10000

Items

- Item List (Map Columns)

Database Columns	Special Instructions	Data Type	Field Length
Item Number	(REQUIRED). This is a Item Number.	text	100
Active	This is Active value(Boolean) for Item.	Yes/No	0
Type	(REQUIRED). This is Type for Item.	text	50
Category	This is Category for Item.	text	255
Sub Category		text	255
Item Description		text	10000
Manufacturer	This is Manufacturer for Item.	text	50
OEMModelNumber	This is OEM Model Number for Item.	text	50
AverageCost	This is Average Cost for Item.	money	0
ListPrice	This is List Price for Item.	money	0
SpecialNotes	This is Special Notes for Item.	text	10000
LastOrderDate	This is Last Order Date value for Item.	date	0
UnitofMeasure	This is Unit of Measure for Item.	text	15
Bin Location	This is the (default) Bin Location for this item.	text	50
Weight	This is Weight for Item.	Decimal	0
WeightUnit	This is Weight Unit for Item.	text	15
UPCCode	This is UPC Code for Item.	text	30
Assembly	This is Assembly value(Boolean) for Item.	Yes/No	0
MatrixPricing	This is Matrix Pricing for Item.	Yes/No	0
Taxable	This is Taxable value(Boolean) for Item.	Yes/No	0
AmountOrdered	This is Amount Ordered for Item.	real	0
QIS	(Qty in Stock)	decimal	0
QBO	(Qty on Back Order on Sales Orders not Invoiced#)	decimal	0
QPO	(Qty on Purchase Orders)	decimal	0

Min	This is Reorder Point (Min) value for Item.	real	0
Max	This is Stock Level (Max) value for Item.	real	0
SpecialOrder	This is SpecialOrder(boolean) for Item.	Yes/No	0
PricingCategory	This is Pricing Category for Item.	text	150
BrokenCasePricingType	This is Broken Case Pricing Type for Item.	small number	0
BrokenCasePriceCode	This is Broken Case Price Code for Item.	text	10
BrokenCaseMultiplier	This is Broken Case Multiplier for Item.	Decimal	0
PO Category		text	50
SubCategory3	This is SubCategory3 for Item.	text	255
SubCategory4	This is SubCategory4 for Item.	text	255
Commissionable	This is Commissionable for Item.	Yes/No	0
MasterItemNumber	This is Master Item Number for Item.	text	255
ItemNumAlt1	This is Alt#1 (Size Box) for Item.	text	50
YearsListing	This is Years Listing for Item.	text	10000
OrigItemNum	This is Orig Item Number for Item.	text	50
OEMPrice	This is OEM Price for Item.	money	0
InterchangeNumber	This is Interchange Number for Item.	text	50
LastAddedCost	This is Last Added Cost for Item.	money	0
EcomRetailPrice	This is Ecom Retail Price for Item.	money	0
DataConversionNotes	This is Data Conversion Notes for Item.	text	255
ItemNumAlt2	This is Alt#2 (Skid Qty) for Item.	text	50
CreatedBy	This is a value to store who will create an Item.	number	0
CreatedDate	This is Created Date for Item.	date	0
ModifiedBy	This is a value to store who will update a Item.	number	0
ModifiedDate	This is Modified Date for Item.	date	0
IncomeAccountRef	This is Income Account Reference for Item.	text	150
ExpenseAccountRef	This is Asset Account Reference for Item.	text	150
AssetAccountRef	This is Asset Account Reference for Item.	text	150
QBOSync	This is QBOSync value(boolean) for Item.	Yes/No	0
YearRange	This is Year Range for Item.	text	50

- **Item Quantity in Stock (Map Columns)**

Database Columns	Special Instructions	Data Type	Field Length
ItemID	(REQUIRED). This is an Item # that is already in OneSource.	text	150
QIS (Qty in Stock)	(REQUIRED). This is the TOTAL quantity in stock right now. This value needs to be a whole number, such as 1 or 3 or 20. If the number is NOT > 0 the row will NOT be imported.	decimal	0
QtyReceived	This is the Quantity originally received into stock. For example maybe you received 10 but now have 5 left in stock (which will be illustrated in the Qty in Stock field).	decimal	0
DateReceived	This is the date that the item was received into Stock. (Note: If no date is selected OneSource will insert Today's date).	date	0
WarehouseID	(REQUIRED). This is the Warehouse CODE you have assigned to the warehouse in OneSource. If you only have 1 warehouse just leave this field blank and it will be auto filled in for you.	text	150
Last PO Cost	(REQUIRED). This is the individual unit cost you paid for the item from your vendor. Any records where the Cost is not > \$0.00 will NOT be imported. If you paid any 'additional' costs associated with shipping the item to you list those costs in the field called: Additional (Landed Costs).	money	0
AdditionalCost	This represents any additional 'landed' (shipping) costs associated with the item.	money	0
Lot1	This is the Bin location of the item.' (If you have more than 1 bin location be sure to make a separate 'row' on your spreadsheet for each unique bin location. For instance, if Item X had 5 in location 101 and 2 in location 501 then you would need to have 2 rows on your spreadsheet for Item X.	text	20
Lot2	This is the Lot / Serial # of the item.' (Like the Bin field, if you have more than 1 Lot / Serial # then be sure to make a separate 'row' on your spreadsheet for each unique Lot / Serial # for the item.	text	20

- **Item Price Levels (Map Columns)**

Database Columns	Special Instructions	Data Type	Field Length
ItemID	(REQUIRED). This field must be a unique alpha numeric Item #.	text	150
MatrixPriceCode	(REQUIRED). This is a Matrix Price Code for Price level.	text	50
QtyLow	(REQUIRED). This is Qty Low value for Price level.	real	0
QtyHigh	(REQUIRED). This is Qty High value for Price level.	real	0
Price	This is a Price for Price level.	money	0
DiscountPercent	This is Discount Percent for Price level.	real	0
FuturePrice		decimal	0
FuturePriceDate		date	0
LastPrice		decimal	0
LastPriceDate		date	0

- **Item Search Catalog (Map Columns)**

Database Columns	Special Instructions	Data Type	Field Length
ItemNumber	(REQUIRED). This is Item Number value for Item Catalog.	text	150
Item Description		text	10000
SubCategory3	This is Make value for Item Catalog.	text	100
SubCategory4	This is Model value for Item Catalog.	text	100
YearsListing	This is Years Listing value for Item Catalog.	text	500
Notes	This is Notes for Item Catalog.	text	10000
YearRange	This is Year Range value for Item Catalog.	text	100
Category		text	75
Sub Category		text	75
CatalogSource	This determines the source of the Catalog record. If the catalog will be maintained by a Catalog tool, such as Partslink, then put the name of the catalog in this field. If the part will be maintained manually by the user then insert 'Customer' for the value.	text	50
PlinkNumber	This is Plink Number value for Item Catalog.	text	30
OEMNumber	This is OEM Number value for Item Catalog.	text	30

- **Item Bundle (Assembly) Components**

- **Vendor Item Numbers (Map Columns)**

Database Columns	Special Instructions	Data Type	Field Length
ItemID	(REQUIRED). This is an Item # that is already in 1place.	text	150
VendorID	(REQUIRED). This is the related Vendor Number in 1place.	text	150
VendorItemNum	(REQUIRED). This is the Vendor Item Number for Item Vendor.	text	50
VendorCost	This is the Vendor Cost for Item Vendor.	money	0
VendorLeadTime	This is the Vendor Lead Time(Boolean) for Item Vendor.	number	0
Notes	This is the Notes for Item Vendor.	text	10000
CasePack	This is the Case Pack(Boolean) for Item Vendor.	Decimal	0
CostLastChangeDate	This is the Cost Last Change Date for Item Vendor.	date	0
CubicSquareFt	This is the Cubic Square Ft for Item Vendor.	Decimal	0
Duty Percent	This is the Duty % field if duty is charged on the item.	Decimal	0
RoundUpQtyToCaseQtyOnPO	This is the Round Up Qty To Case Qty On PO(Boolean) for Item Vendor.	Yes/No	0
ConvertQtyToCaseQtyOnPO	This is the Convert Qty To Case Qty On PO(Boolean) for Item Vendor.	Yes/No	0
LastOrderDate	This is the Last Order Date for Item Vendor.	date	0
QtyOnOrder	This is the Qty On Order for Item Vendor.	Decimal	0
VendorQtyInStock	When you import or update Vendor Items this is the Qty in Stock the Vendor has reported to you.	real	0
VendorQtyInStockLastUpdated	When you import or update Vendor Items this is the Date the Qty in Stock was last updated. If this column is left blank it will fill in with the current date.	date	0

- **Item Cross Reference**

Database Columns	Special Instructions	Data Type
ItemNumber		nvarchar(250), not null
CrossReferenceNumber		nvarchar(250), not null
ItemVendor		nvarchar(250), null
ItemManufacture		nvarchar(250), null
Notes		nvarchar(2000), null

Sales

Quotes

- **Quotation Headers (Map Columns)**

Database Columns	Special Instructions	Data Type	Field Length
QuotationNum	(REQUIRED). This field must be a unique alpha numeric Quotation #.	text	50
QuoteDate	(REQUIRED). This field must contain a valid date.	date	0
BillToCustomerNumber	(REQUIRED). This must be a valid alpha numeric Bill To Customer #.	text	150
BillToContactName	This is the Customer contact name, such as John Doe.	text	10000
BillToCompanyName	This is the Bill To Company Name, such as: ABC Company.	text	255
BillToStreet	This is the Bill To Street	text	250
BillToCityStateZipPostalCode	This is the Bill To CityStateZipPostalCode	text	250
ShipToCustomerNumber	(REQUIRED). This must be a valid alpha numeric Ship To Customer #.	text	150
ShipToContactName	This is the Ship To Contact name, such as: Jane Smith.	text	10000
ShipToCompanyName	This is the Ship To Company Name, such as: ABC Company.	text	255
ShipToStreet	This is the Ship To Street	text	250
ShipToCityStateZipPostalCode	This is the Ship To CityStateZipPostalCode	text	250
SubTotal	This is the Sales Order SubTotal field. It should represent the total of the Line Items. If this field is left blank \$0 will be inserted.	money	0
FreightOrOtherCharges	This is the Sales Order Freight / Other field. If this field is left blank \$0 will be inserted.	money	0
TotalTax	This is the Total Tax amount for this Sales Order. If this field is left blank a \$0 will be inserted and NO taxes will be changed for this Sales Order.	money	0
GrandTotal	(REQUIRED). This is the Grand Total of the Sales Order.	money	0
PaymentTerms	(REQUIRED). This is the Payment Terms. (Note: If this field is left blank the Net 30 payment term will be auto inserted).	text	150
CustomerPONumber	This is the Customer PO #.	text	20
SourceOfOrder	This is the Source of the Order.	text	50
QuotationComments	This is the Comments (notes to the customer) field on the footer of the Sales Orders.	text	10000
EnteredBy	This is the name of the user who entered the Sales Order.	text	50
ShippedVia	This is the Shipped Via value for Quotation.	text	150
Warehouse	This is the Warehouse value for Quotation.	text	150

- **Quotation Line Items (Map Columns)**

Database Columns	Special Instructions	Data Type	Field Length
QuotationNumber	(REQUIRED). This field must be a unique alpha numeric Quotation #.	text	150
ItemNumber	(REQUIRED). This is the <u>Item Number</u> that should already be added or imported into 1place.	text	150
Category	This is the Item Category.	text	50
Quantity	(REQUIRED). This is the Quantity Ordered by the Customer.	decimal	0
ItemDescription	(REQUIRED). This is the Item Description.	text	10000
UnitPrice	This is the Unit Price. This is the Price BEFORE any Discount has been applied.	money	0
Discount	This is the Discount given off the Unit Price. Set to 0 if none.	real	0
Taxable	Was this line item Taxable? If so type Yes, if not type No.	Yes/No	0
Cost	This is the Cost.	decimal	0
LineTotal	(REQUIRED). What is the EXTENDED Line Total? (QtyOrdered x NetPrice)	money	0
ListPrice	This is the List Price. This field is optional.	money	0
NetPrice	(REQUIRED). This is the final Net Price, including any discount given.	money	0

Sales Orders

- Sales Order Headers - Unshipped (Map Columns)

Database Columns	Special Instructions	Data Type	Field Length
SalesOrderNumber	(REQUIRED). This field must be a unique alpha numeric Sales Order #.	text	22
SalesOrderDate	(REQUIRED). This field must contain a valid date.	date	0
BillToCustomerNumber	(REQUIRED). This must be a valid alpha numeric Bill To Customer #.	text	150
BillToContactName	This is the Customer contact name, such as John Doe.	text	10000
BillToCompanyName	This is the Bill To Company Name, such as: ABC Company.	text	255
BillToStreet	This is the Bill To Street.	text	250
BillToCityStateZipPostalCode	This is the Bill To CityStateZipPostalCode	text	250
ShipToCustomerNumber	(REQUIRED). This must be a valid alpha numeric Ship To Customer #.	text	150
ShipToContactName	This is the Ship To Contact name, such as: Jane Smith.	text	10000
ShipToCompanyName	This is the Ship To Company Name, such as: ABC Company.	text	255
ShipToStreet	This is the Ship To Street	text	250
ShipToCityStateZipPostalCode	This is the Ship To CityStateZipPostalCode	text	250
SubTotal	This is the Sales Order SubTotal field. It should represent the total of the Line Items. If this field is left blank \$0 will be inserted.	money	0
FreightOrOtherCharges	This is the Sales Order Freight / Other field. If this field is left blank \$0 will be inserted.	money	0
TotalTax	This is the Total Tax amount for this Sales Order. If this field is left blank a \$0 will be inserted and NO taxes will be changed for this Sales Order.	money	0
GrandTotal	(REQUIRED). This is the Grand Total of the Sales Order.	money	0
BalanceDue	If this field is left blank the value will be set to \$0.	money	0
SalesOrderStatus	Each Sales Order Status field should have ONE of these values: 'New', 'To Print & Pick', 'Picking', 'To Invoice', or 'To Load/Ship'. If this field is left blank the default value inserted will be: 'To Print & Pick'.	text	150
PaymentTerms	This is the Payment Terms. (Note: If this field is left blank the Net 30 payment term will be auto inserted).	text	150
CustomerPONumber	This is the Customer PO #.	text	30
SourceOfOrder	This is the Source of the Order.	text	50
SalesOrderComments	This is the Comments (notes to the customer) field on the footer of the Sales Orders.	text	10000
EnteredBy	This is the name of the user who entered the Sales Order.	text	50
JobID	This is the Job ID #.	text	150

- Sales Order Line Items - Unshipped (Map Columns)

Database Columns	Special Instructions	Data Type	Field Length
SalesOrderNumber	(REQUIRED). This field must be a unique alpha numeric SalesOrder #.	text	150
ItemNumber	(REQUIRED). This is the Item Number that should already be added or imported into 1place.	text	150
QtyOrdered	This is the Quantity Ordered by the Customer.	decimal	0
QtyShipped	This is the Quantity Shipped to the Customer for this Order. Set at 0 if none shipped.	decimal	0
BOQty	This is the Quantity that have been Back Ordered and not Shipped yet. Set this value to 0 if none.	decimal	0
PrevShipped	This is the Quantity that were Previously Shipped on a related Sales Order, if this is a Sales Order Back Order. Set this value to 0 if none.	decimal	0
ItemDescription	This is the Item Description.	text	10000
ListPrice	This is the List Price. This field is optional.	money	0
UnitPrice	This is the Unit Price. This is the Price BEFORE any Discount has been applied.	money	0
Discount	This is the Discount given off the Unit Price. Set to 0 if none.	real	0
NetPrice	This is the final Net Price, including any discount given.	money	0
Taxable	Was this line item Taxable? If so type Yes, if not type No.	Yes/No	0
LineTotal	What is the EXTENDED Line Total? (QtyOrdered x NetPrice)	money	0
DateShipped	What date was this item shipped? This field is optional.	date	0
LineItemComments	Internal line item comments not visible to the Customer.	text	10000
SerialNumber	This is the Serial # of the item, if applicable. This field is optional.	text	50
UnitCost	This is the Unit Cost. The COST 'each' is \$5 then you would enter \$5.00.	money	0

- **Sales Order Header + Lines**

Invoices & Credits

- **Invoice & Credit Memo Headers (Map Columns)**

Database Columns	Special Instructions	Data Type	Field Length
InvoiceNumber	(REQUIRED). This field must be a unique alpha numeric Invoice #.	text	20
InvoiceDate	(REQUIRED). This field must contain a valid date.	date	0
BillToCustomerNumber	(REQUIRED). This must be a valid alpha numeric Bill To Customer #.	text	150
BillToContactName	This is the Customer contact name, such as John Doe..	text	200
BillToCompanyName	This is the Bill To Company Name, such as: ABC Company.	text	255
BillToStreet	This is the Bill To Street	text	250
BillToCityStateZipPostalCode	This is the Bill To CityStateZipPostalCode	text	250
ShipToCustomerNumber	(REQUIRED). This must be a valid alpha numeric Ship To Customer #.	text	150
ShipToContactName	This is the Customer contact name, such as John Doe..	text	200
ShipToCompanyName	This is the Ship To Company Name, such as: ABC Company.	text	255

ShipToStreet	This is the Ship To Street	text	250
ShipToCityStateZipPostalCode	This is the Ship To CityStateZipPostalCode	text	250
Warehouse		text	150
SubTotal	This is the Invoice SubTotal field. It should represent the total of the Line Items. If this field is left blank \$0 will be inserted.	money	0
FreightOrOtherCharges	This is the total of the Freight and Other charges for the Invoice.	money	0
TotalTax	This is the Total Tax amount for this Invoice. If this field is left blank a \$0 will be inserted and NO taxes will be changed for this Invoice or Credit Memo.	money	0
1placeTaxCode	This is the 1place TaxCode for Invoice	text	250
TaxExempt	This is the Tax Exempt for Invoice	text	250
GrandTotal	(REQUIRED). This is the Grand Total of the Invoice or Credit Memo.	money	0
TotalPayments	This is for the Total Payments already applied to this Invoice or Credit Memo. If this field is left blank the Balance Due will be = GrandTotal.	money	0
BalanceDue	If this field is left blank the value will be set to \$0.	money	0
InvoiceType	This field will usually have an 'I' (for Invoice) or a 'C' (for Credit Memo). If this field is left blank any transaction that is imported where the Total is a 'positive' number this field will automatically be set to 'I' (and will be imported as an Invoice). Any transaction where the Total is a 'negative' number this field will automatically be set to 'C' (and will be imported as a Credit Memo).	text	1
PaymentTerms	(REQUIRED). This is the Payment Terms. (Note: If this field is left blank the Net 30 payment term will be auto inserted).	text	150
CustomerPONumber	This is the Customer PO #.	text	200
SourceOfOrder	This is the Source of the Order.	text	50
Shippedvia		text	50
InvoiceComments	This is the Comments (customer notes) field.	text	10000
EnteredBy	This is the value to store who will create a Invoice.	text	50
JobID	This is the Job ID #.	text	150
SalesMan		text	30
InvoicePaymentDate	This is the Date of payment for Invoice	text	250

- **Invoice & Credit Memo Line Items (Map Columns)**

Database Columns	Special Instructions	Data Type*	Field Length
InvoiceNumber	(REQUIRED). This field must be a unique alpha numeric Invoice #.	text	150
ItemNumber	(REQUIRED). This is the Item Number that should already be added or imported into 1place.	text	150
QtyOrdered	(REQUIRED). This is the Quantity Ordered by the Customer.	decimal	0
QtyShipped	(REQUIRED). This is the Quantity Shipped to the Customer for this Order. Set at 0 if none shipped.	decimal	0
BOQty	This is the Quantity that have been Back Ordered and not Shipped yet. Set this value to 0 if none.	decimal	0
PrevShipped	This is the Quantity that were Previously Shipped on a related Sales Order, if this is a Sales Order Back Order. Set this value to 0 if none.	decimal	0
PrevQtyReturned	This is the Quantity that have been returned for this item on this Sales Order. Set this value to 0 if none.	decimal	0
ItemDescription	(REQUIRED). This is the Item Description.	text	10000
ListPrice	This is the List Price. This field is optional.	money	0
UnitPrice	This is the Unit Price. This is the Price BEFORE any Discount has been applied.	money	0
Discount	This is the Discount given off the Unit Price. Set to 0 if none.	real	0
NetPrice	(REQUIRED). This is the final Net Price, including any discount given.	money	0
Taxable	Was this line item Taxable? If so type Yes, if not type No.	Yes/No	0
LineTotal	(REQUIRED). What is the EXTENDED Line Total? (QtyOrdered x NetPrice)	money	0
DateShipped	What date was this item shipped? This field is optional.	date	0
LineItemComments	Internal line item comments not visible to the Customer.	text	10000
SerialNumber	This is the Serial # of the item, if applicable. This field is optional.	text	10000
UnitCost	This is the Unit Cost. The COST 'each' is \$5 then you would enter \$5.00.	money	0

- **Invoice & Credit Memo Import Payments (Map Columns)**

Database Columns	Special Instructions	Data Type	Field Length
CustomerNumber	(REQUIRED). This must be a valid alpha numeric Ship To Customer #.	text	250
InvoiceNumber	(REQUIRED). This field must be a unique alpha numeric Invoice #.	text	250
InvoiceType	This is Transaction Type	text	250
InvoicePaymentDate	(REQUIRED). This field must contain a valid date.	date	250
TotalPayment	(REQUIRED). This is the Amount to be paid	decimal	250
PaymentTerms	(REQUIRED). This is the Payment Terms.	text	250
PaymentRefNumber	This is the Payment Ref Number.	text	250
PaymentMethod	(REQUIRED). This is the Payment Method.	text	250
DepositToAccount	This is the Deposit To Account.	text	250
ReceiptNumber	This is the Receipt Number.	text	250

Purchasing

Purchase Orders

- Purchase Order Headers (Map Columns)

Database Columns	Special Instructions	Data Type	Field Length
PurchaseOrderNum	(REQUIRED). This field must be a unique alpha numeric PurchaseOrder #.	text	50
VendorID	(REQUIRED). This field must contain a valid Vendor ID from your old accounting system.	text	150
PODate	(REQUIRED). This field contains the Date of the PO. Must be in proper Date format.	date	0
POStatus	If this field is left blank then 'Waiting For Delivery' will automatically be inserted in this field.	text	150
OrderedBy	Enter a User Name that is included in your list of 1place users, or this field will be left blank.	text	50
Terms	Enter a Payment Term that is in 1place or this field will be left blank.	text	50
FOB	This is the Free On Board value.	text	50
ShippedVia	This is the Shipped Via.	text	50
DateExpected	This is the date you expect to receive the PO.	text	50
POReceived	This value needs to be = 'True' or 'Yes' or '1' if the PO has been received. Or 'False' or 'No' or '0' if the PO has NOT been received. If this field is left blank the field will be set to True.	Yes/No	0
Comments	This is for any comments about the PO.	text	10000
BillToWarehouseCode	(REQUIRED). This field must contain a valid Warehouse 'Code' (which you can get from the Warehouses entered in the settings of this 1place app).	text	50
ShipToWarehouseCode	(REQUIRED). This field must contain a valid Warehouse 'Code' (which you can get from the Warehouses entered in the settings of this 1place app).	text	50
ContainerNum	This is for the Container Number, if applicable.	text	50

- Purchase Order Line Items

Database Columns	Special Instructions	Data Type	Field Length
PurchaseOrderNumber	(REQUIRED). This field must be a unique alpha numeric Invoice #.	text	150
LineItemItemNumber	(REQUIRED). This is the valid 1place Item Number.	text	150
LineItemReceived	This is a Yes or No value. Has the item been received?	Yes/No	0
LineItemQtyOrdered	(REQUIRED). This is the Qty Ordered.	decimal	0
LineItemQtyReceived	(REQUIRED). This is the Qty Received. SPECIAL NOTE: If you are importing OPEN / UNRECEIVED POs the Qty Received must be set to 0 and the Qty Ordered must be set to the amount of item not already received on the PO. In other words, you cannot import partially received POs.	decimal	0
LineItemDescription	This is the PO Line Item Description.	text	10000
LineItemAddedCost	This is the PO Line Item individual unit cost for 'extra' landed costs (which are costs not associated with the actual cost of the item).	money	0
LineItemCost	(REQUIRED). This is the PO Line Item individual unit Cost.	money	0
LineItemPOLineTotal	(REQUIRED). This is the PO Line Total. This is calculated: LineItemQtyOrdered x LineItemCost.	money	0
LineItemWeight	This is the PO Line item weight of the item.	real	0
LineItemVolume	This is the PO Line Item volume.	real	0
Comment	This is the PO Line Item comment.	text	10000
Lot1	This is the PO Line Item bin.	text	50

Warehouse

Bin Management

- Bin Locations

Database Columns	Special Instructions	Data Type
WarehouseCodeName		nvarchar(150), not null
BinLocation		nvarchar(150), not null
BinPickingOrder		decimal, not null
BinZone		nvarchar(150), not null

Jobs

Jobs (Map Columns)

Database Columns	Special Instructions	Data Type
JobNumber		nvarchar(50)
JobCustomerID		nvarchar(150)
JobContactID		nvarchar(150)
JobCompleted		Yes/No
JobValue		money
JobType		nvarchar(50)
JobShortDesc		nvarchar(255)
JobOrigDate		date
JobExpCompDate		date
JobCompDate		date
JobStatus		nvarchar(50)
JobLastResults		nvarchar(255)
JobLastContactDate		date
JobLastMeetingDate		date
JobNextContactDate		date
JobNextMeetingDate		date
PriorityGrouping		nvarchar(50)
PriorityItem		real
EstTime		real
JobSubType		nvarchar(50)
ActualTime		real
SalesMan		nvarchar(50)
Comments		nvarchar(10000)
FromEmailAddress		nvarchar(75)
AssignedTo		nvarchar(50)
Entered By User		nvarchar(50)
EnteredDate		date
ModifiedBy		nvarchar(50)
ModifiedDate		date
EmailToAddress		nvarchar(10000)
CompanyName		nvarchar(150)
CustomerCompanyName		nvarchar(150)

Tasks

Tasks (Map Columns)

Database Columns	Special Instructions	Data Type
TaskNumber		nvarchar(50)
OrganizationID		nvarchar(150)
ContactID		nvarchar(150)
DateOfActivity		date
ActivityTypeID		nvarchar(50)
ActivityDescription		nvarchar(10000)
ActivityResultsNotes		nvarchar(10000)
UserSchedFor		nvarchar(50)
EstTime		nvarchar(50)
UserSchedBy		nvarchar(50)
GroupPriority		nvarchar(50)
ItemPriority		real
FromEmailAddress		nvarchar(75)
ActivityCompleted		Yes/No
ToBeBilled		Yes/No
StartTime		nvarchar(50)
StopTime		nvarchar(50)
TotalTime		decimal
BillableTime		decimal
DateTimeCompleted		date
EmailToAddress		nvarchar(10000)
TaskBilled		Yes/No
BillableItem		nvarchar(150)
Subject		nvarchar(10000)
CompanyName		nvarchar(150)
CustomerCompanyName		nvarchar(150)
VendorCompanyName		nvarchar(150)

Step 2 - Download the Excel Template

1. Select the Import Type.
2. Click **Download Excel Template**.
3. Save the template to your computer.

Complete the template before importing.

Step 3 - Select the Import File

1. Click **Browse**.
2. Select the completed Excel file.

(Optional)

- Select a **Saved Template** if available.

- Choose a record range to import if needed.

Step 4 - Choose the Import Action

Select one of the following:

Import New Records

Creates new records.

Update Existing Records

Updates existing records using the values in the Excel file.

Step 5 - Map the Columns

1. Review the **Map Columns** screen.
2. Verify that each Excel column is mapped to the correct 1place database field.
3. Make any necessary adjustments.
4. Click **Proceed** to continue.

Step 6 - Configure Import Defaults (for selected data types only)

The **Customer Import Defaults** window allows you to automatically assign values when the corresponding Excel columns are left blank.

Available defaults include:

- Customer Number (Auto Generate)
- Payment Terms
- Payment Method
- Shipped Via
- Address Type
- Warehouse
- Pricing Markup
- Pricing Discount
- Pricing Multiplier

These defaults are only applied when the corresponding value is **not provided** in the Excel file.

Example: If your Excel sheet does not specify a Payment Term, the default Payment Term selected here will be assigned during import.

Notes

- Download the template that matches the selected Import Type.

- Some Import Types require importing **Headers** before **Line Items**.
 - Import Defaults are applied only when the corresponding Excel fields are blank.
 - Save your column mappings as a **Saved Template** to speed up future imports.
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