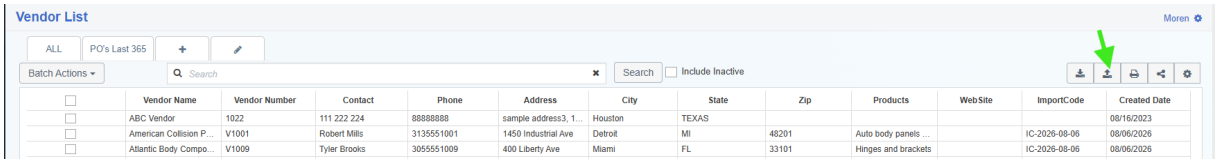
How to Import Your Vendor List

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Use the Import Wizard to add multiple vendors to 1place from an Excel file.

Steps

1. Open **Vendors** from the Main Menu.
2. On the **Vendor List**, click **Upload to 1place** button in the upper-right corner, beside the Download to Device button, to open the **Import Wizard**.



3. Select **Vendors** from the **Import Type** list.
4. Click **Download Excel Template** and save it to your computer.
5. Open the template and enter your vendor information. Complete both required columns:

Column	What to enter
VendorNumber	The vendor's number or code
VendorName	The vendor's business or company name

Complete the other applicable columns:

Column	What to enter
Active	Whether the vendor is active or not
POType	Purchase Order types allowed for the vendor
VendorAccountNumber	Your company's account number with the vendor
Salutation	The primary contact's prefix, such as Mr. or Ms.
FirstName	The primary contact's first name
LastName	The primary contact's last name
Title	The primary contact's job title or position
Street	The vendor's street address
Suite	Additional address details, such as a suite or unit number
City	City
State	State or province

PostalCode	ZIP or postal code
Country	Country
Phone	Main telephone number
Fax	Fax number
PaymentTerms	Payment terms agreed upon with the vendor
CreditLimit	Maximum credit amount available from the vendor
ProductsServices	Description of the products or services supplied
SICCode	Standard Industrial Classification code, if applicable
EmailAddressCompany	The vendor's company email address
WebSite	The vendor's website address
CreatedDate	Record creation date
CreatedBy	User associated with creating the record
ModifiedDate	Record's last modification date
ModifiedBy	User associated with the last modification
QBOSync	QuickBooks Online synchronization setting
Comments	Additional vendor notes

Save the completed file.

6. Return to the Import Wizard. Click **Browse** and select your completed Excel file.
7. Select **Import New Records** to create vendors. To modify existing vendors, select **Update Existing Records**.
8. Review **Map Columns** and match each Excel column to the correct 1place field.
9. Click **Proceed**.
10. After the import finishes, open the **Vendor List** and review the imported records.

Tip: Save your column mappings as a **Saved Template** for future imports by clicking the **Save Template** button beside the **Proceed** button