How to Import a List of Items

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Overview

Use this guide to add multiple items to 1place from an Excel file. You'll prepare the**Item List** template, match your spreadsheet columns to 1place fields, and use the validator to catch issues before completing the import.

Steps

1. **Open the Import Wizard.**
   From the Main Menu, open **Items**. On the **Item List**, click the **Upload to 1place** button beside the Download to Device button in the upper-right corner.
2. **Download the Item List template.**
   Set **Import Type** to **Item List**, then click **Download Excel Template**.
3. **Prepare your Excel file.**
   Enter one item per row. Complete both required fields, **Item Number** and **Type**, then fill in the other columns that apply to your items. Use the column reference below as you work, then **save** the file.
4. **Select the file and import action.**
   Return to the Import Wizard, click **Browse**, and select your completed Excel file. Choose **Import New Records** to add items or **Update Existing Records** to change or update items already in 1place.
5. **Review the column mapping.**
   In **Map Columns**, check that each Excel column you intend to import points to the correct 1place field. Make sure **Item Number** and **Type** are mapped, then click **Proceed**.
6. **Review the validation results (when displayed).**
   The validator shows duplicate item numbers and any data that does not meet the import criteria. If it flags an issue, correct the affected data and validate the corrected file before completing the import by clicking **Start Import**.
7. **Verify the imported items.**
   Return to the **Item List** and search for a few item numbers from the spreadsheet. Open the records and check the type, description, and other imported values. If you included **QIS (Qty in Stock)**, verify that the quantity in stock matches your spreadsheet.

Tip: If this is your first import, start with a few items and verify the results before importing the rest.

Template Column Reference

The fields below are grouped by purpose. Use the column names as they appear in the downloaded template.

Required fields

Excel column	What to enter
Item Number	The unique number or code your company uses to identify the item.
Type	The item's classification in 1place.

Item details and identifiers

Excel column	What it represents
Active	Whether the item is active.
Item Description	The name or description of the item.
Manufacturer	The manufacturer associated with the item.
OEMModelNumber	The original equipment manufacturer's model identifier.
UPCCode	The item's Universal Product Code.
Assembly	Whether the item is an assembly.
MasterItemNumber	The master item number, if your company uses one.
ItemNumAlt1	The first alternate item number.
ItemNumAlt2	The second alternate item number.
OrigItemNum	The original item number.
InterchangeNumber	The reference number used to identify interchangeable parts.
Patented	Whether the item is patented.

Catalog and search details

Excel column	What it represents
Category	The item's catalog category.
Sub Category	The item's catalog subcategory.
QualityIndicator	The quality indicator configured in your catalog.
SubCategory2	A configurable catalog field, commonly used for a vehicle year range.
SubCategory3	A configurable catalog field, commonly used for vehicle make.
SubCategory4	A configurable catalog field, commonly used for vehicle model.
YearsListing	The individual years associated with the part.
YearRange	The range of years associated with the part.

Inventory and purchasing

Excel column	What it represents
UnitofMeasure	The unit used for the item.
Bin Location	The item's default bin location.
QIS (Qty in Stock)	1place imports the value as entered and uses it as the item's quantity in stock. If no warehouse is assigned, the quantity is imported without a warehouse assignment.
Min	The minimum stock level used as a reorder point.
Max	The target maximum stock level.
PO Category	The category used for purchasing.
SpecialOrder	Whether the item is typically ordered for a specific sale.
LastOrderDate	The date of the last order.

Pricing and sales

Excel column	What it represents
AverageCost	The item's average cost.
ListPrice	The item's list price.
OEMPrice	The original equipment manufacturer's price.
FixedCostForMarkupPricing	The fixed cost used to calculate markup pricing.
PricingCategory	The category used for pricing.
Taxable	Whether the item is taxable.
eCommerce	Whether the item is marked to appear on the integrated website.
Commissionable	Whether the item is eligible for commission.

Shipping

Excel column	What it represents
Weight	The item's shipping weight.
WeightUnit	The unit for the shipping weight.
Volume	The item's volume.
ShipLength	The item's shipping length.
ShipWidth	The item's shipping width.
ShipHeight	The item's shipping height.
Shippable	Whether the item can be shipped.

QuickBooks Online

Excel column	What it represents
IncomeAccountRef	The QuickBooks Online income account reference.

ExpenseAccountRef	The QuickBooks Online expense account reference.
AssetAccountRef	The QuickBooks Online asset account reference.
QBOSync	The item's QuickBooks Online sync setting.

Notes and record history

Excel column	What it represents
SpecialNotes	Special notes associated with the item.
DataConversionNotes	Notes related to a data conversion or migration.
AdditionalNotes	Other notes about the item.
CreatedBy	The user associated with creating the record.
CreatedDate	The date the record was created.
ModifiedBy	The user associated with the last change.
ModifiedDate	The date the record was last changed.