How to Import or Update a List of Item Price Levels

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Overview

Use this guide to add or update price levels for multiple items using Excel. You'll prepare the template, map the columns, validate the data, and verify the imported prices.

Before You Begin

Set up your company's price level names under **Settings > Items > Item Settings > Item Pricing Levels**

Steps

1. Open **Items** from the Main Menu.
2. On the **Item List**, click **Upload to 1place** in the upper-right corner.
3. Select **Item Price Levels** as the **Import Type**, then click **Download Excel Template**.
4. Enter one item, price level, and quantity range per row. Complete all four required fields.

Required column	What to enter
ItemID	The existing item number in 1place.
MatrixPriceCode	The applicable price level code.
QtyLow	The lowest order quantity covered by the entry.
QtyHigh	The highest order quantity covered by the entry.

   Enter **0** in both **QtyLow** and **QtyHigh** for unrestricted quantities. To define quantity breaks, enter a separate row for each range.

5. Review the additional fields and complete those that apply.

Additional column	What to enter
Price	The selling price for the selected level.
DiscountPercent	The applicable discount percentage.
FuturePrice	A planned future price.
FuturePriceDate	The date when the future price should take effect automatically.
LastPrice	The previous price, if applicable.
LastPriceDate	The date associated with the previous price.

   Note: The discount applies to the price level's List Price. If that List Price is**0**, 1place uses the item's main List Price.

6. Save the file. Return to the Import Wizard, click **Browse**, and select your completed file.
7. Select **Import New Records** to add price level entries or **Update Existing Records** to change existing entries.
8. Review **Map Columns**. Match each spreadsheet column to the correct 1place field, including all four required

fields, then click **Proceed**.

9. Review the validation results. Correct any flagged data and validate the corrected file.
10. Click **Start Import**.
11. Open several affected items and select the **Financial** tab. Compare their price level entries with your spreadsheet to verify the imported values.

Example of Quantity Pricing

ItemID	MatrixPriceCode	QtyLow	QtyHigh	Price
PART001	A	1	5	100.00
PART001	A	6	20	98.00
PART001	B	0	0	90.00

Level **A** provides a unit price of **$100** for 1–5 units and **$98** for 6–20 units. Level **B** provides a unit price of **$90** without a quantity restriction.

Example of Discount Pricing

If the item's main List Price is **$300**, the price level's List Price is **0**, and its discount is **20%**, 1place uses the main List Price to calculate a Net Price of **$240**.