

Importing data

Getting started

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Getting started

Importing data

Load customers, items, opening balances and other records from a spreadsheet.

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Overview

If you already keep customers, items or suppliers in a spreadsheet, you can load them in bulk with **Data Import** instead of typing each one.

Prerequisites

- The permission to create the record type (for example Item).
- Your data in a spreadsheet, one row per record.

Steps

1. Search for **Data Import** and click **Add Data Import**.
2. Choose the **Document Type**, for example *Customer*, and the **Import Type** (*Insert New Records*).
3. Click **Download Template**. Choose which columns you want, and download the Excel or CSV file.
4. Open the template and fill your data in, **keeping the column headings exactly as they are**. Do not remove the first rows.
5. Back in Data Import, attach your filled file.
6. Click **Start Import** after reviewing the **Preview**. Fix any rows with warnings first.
7. When it finishes, open the list to check your records.

Practical example

A hardware shop has 400 items in Excel. The administrator downloads the **Item** template, pastes the item codes, names, groups, units and prices into it, imports it, and finds all 400 items in the Item list in a few minutes.

Important notes

- Import a **small test file first**, with five or ten rows.
- Mandatory fields must be filled for every row.
- Linked values, such as the **Item Group**, must already exist. Create them first.
- To update existing records instead, use *Update Existing Records* and include the record IDs.

Common mistakes

- Changing the column headings, so the system cannot match them.
- Dates in the wrong format. Use the format the template shows.

Troubleshooting

See Data import errors.

Next steps

Move on to Creating your company.

Related documentation

- Data import errors
- Opening stock and stock counts