Importing and Exporting Inventory Data

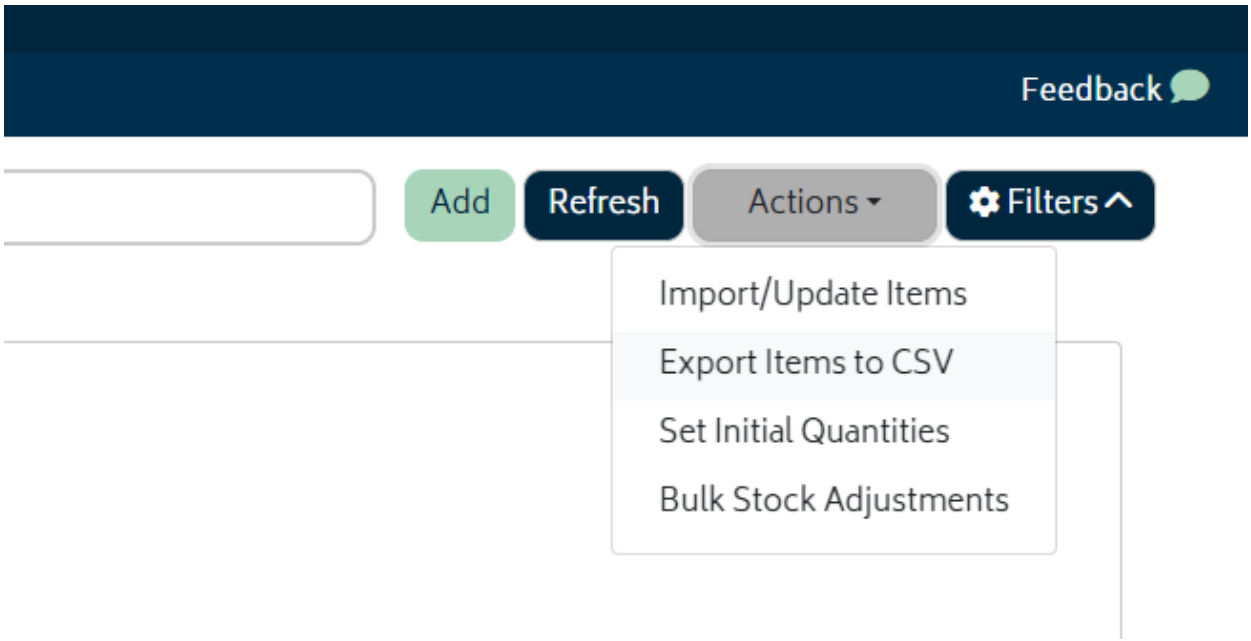
gojeeapp.com.au/knowledge-base/inventory/importing-and-exporting-data

Importing from CSV files

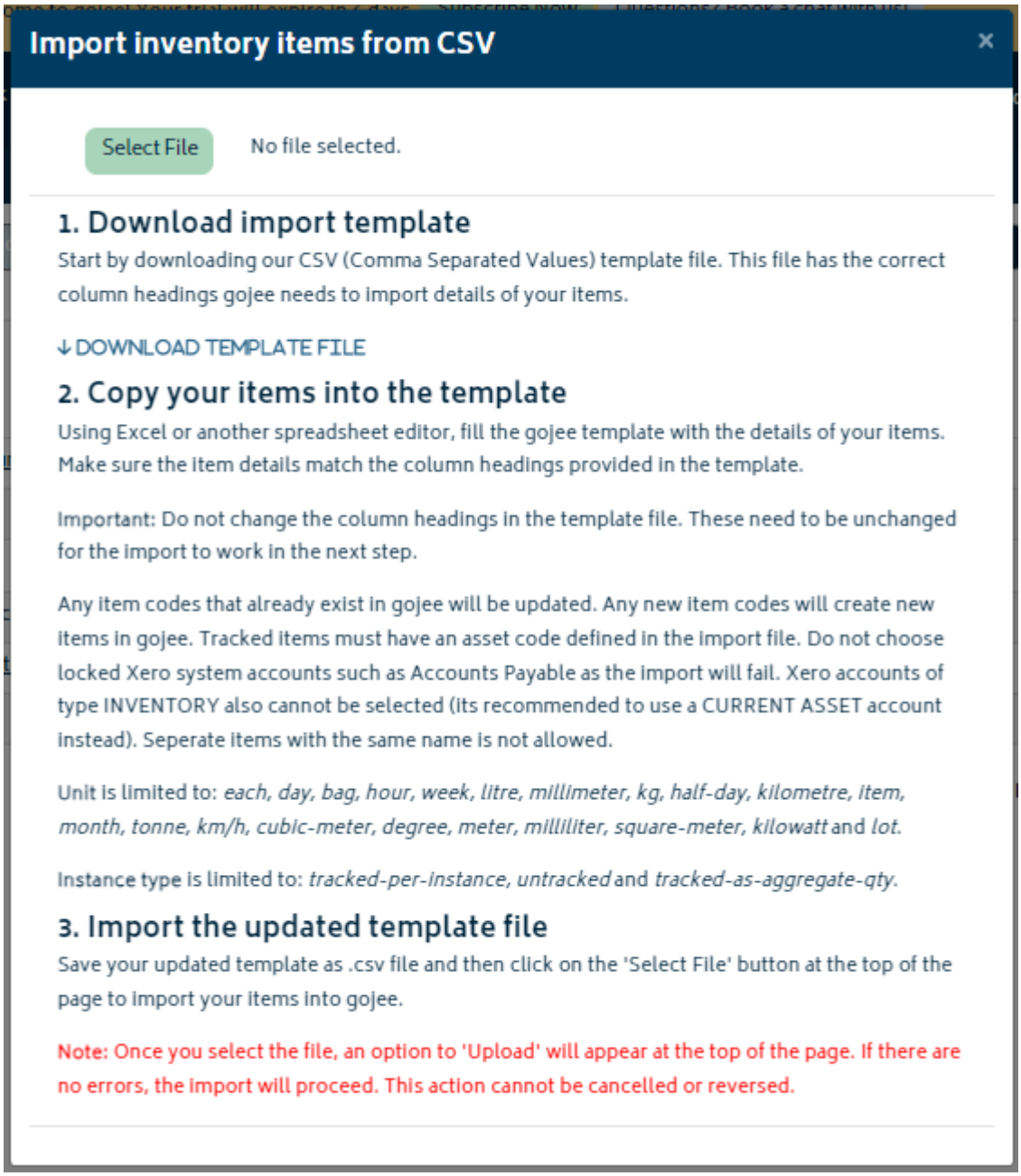
This process should be used when you'd like to import a bulk list of inventory items, or if you'd like to make bulk changes to items previously imported into Gojee.

The import process uses the item code to assess whether the item is new or already exists. Due to this, changes to item code cannot be made in bulk, but most other inventory fields can be updated.

To start an import, navigate to **Inventory & Assets > View/Edit Inventory**.



Click on the **Actions** button at the top right of the page and select **Import/Update Items**. You will be presented with the following modal:



Follow the instructions in the modal to complete the import.

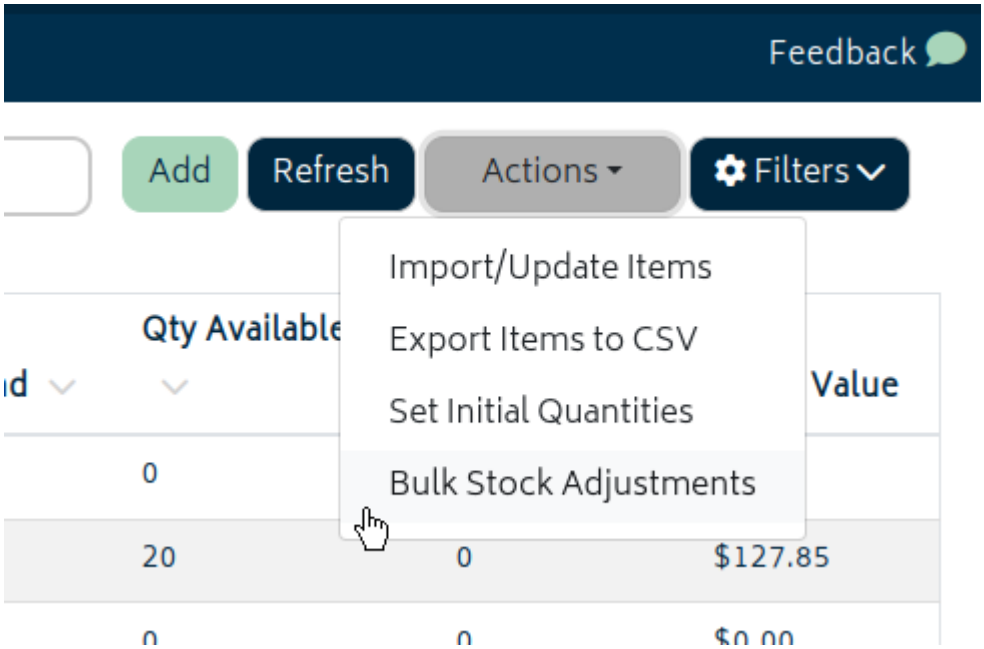
Troubleshooting

- If you find there are errors in the import, check the sections and line numbers, close the modal, and try again.
- If you are importing a large number of items (eg. 10,000+), it may take a while. Please be patient and refresh the page after the import is complete.

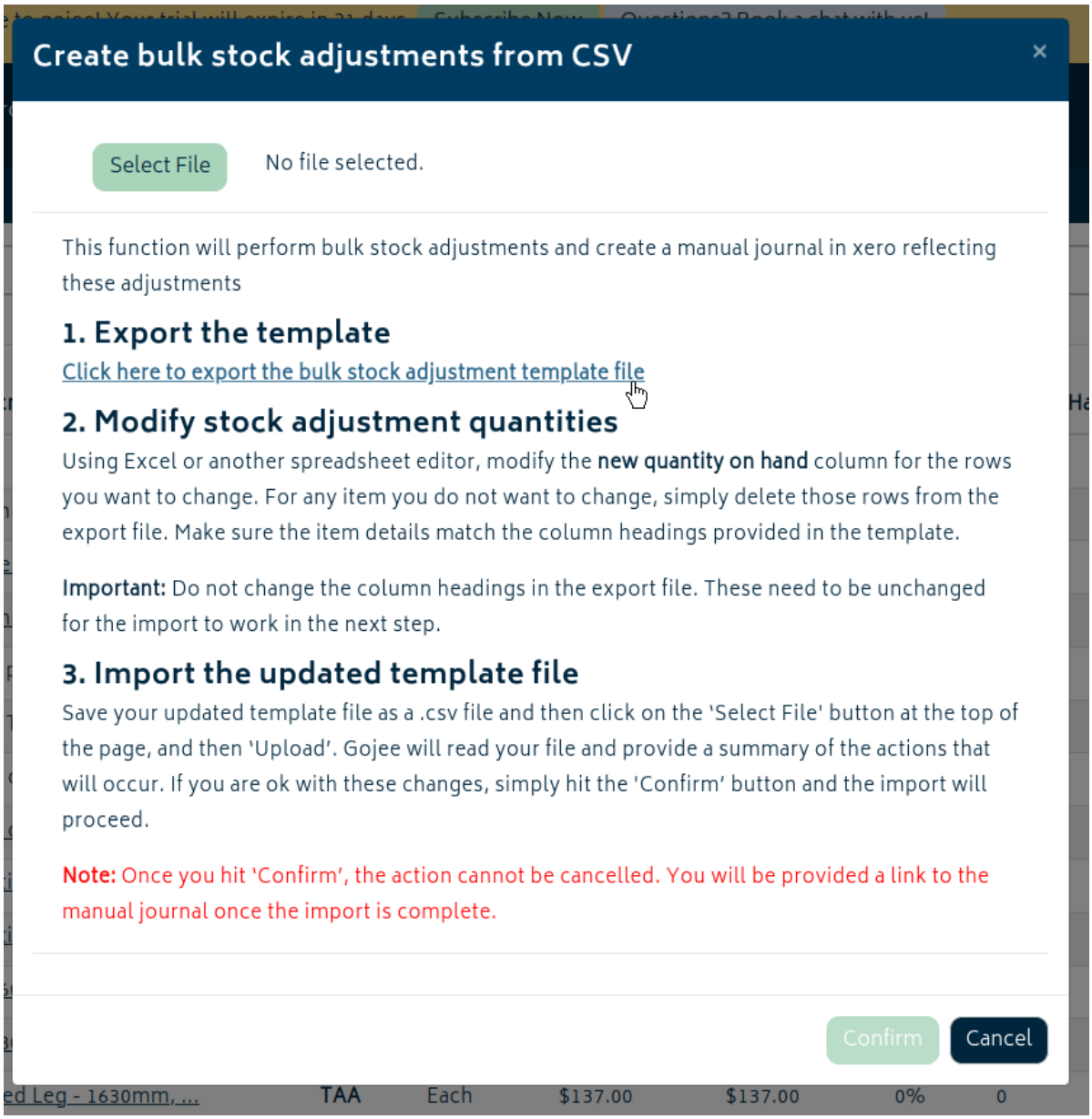
Setting Initial Quantities & Bulk Stock Adjustment

For these options, the process is a little different. Again, navigate to **Inventory & Assets > View/Edit Inventory**. For both initial values and bulk stock adjustments, the process will be the following.

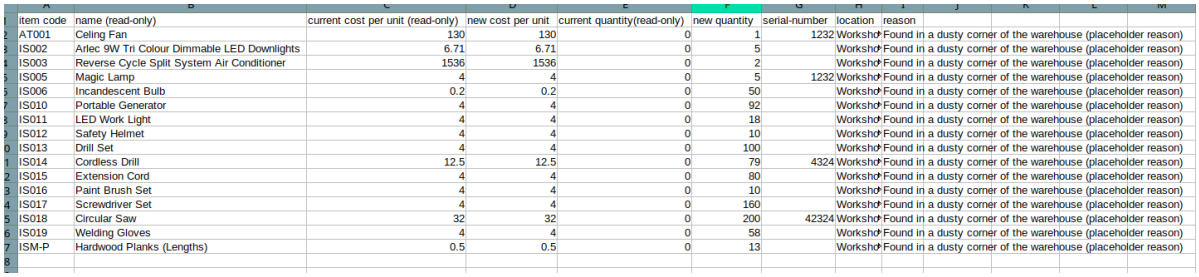
- Click on either Set Initial Quantities or Bulk Stock Adjustment



- For either one, you **must** export the template. This CSV will contain a version of your inventory that is formatted correctly for the a quantity import.



- For Stock Adjustments, you must provide a reason that the stock has been adjusted. For setting initial quantities, the stock must be at a quantity of 0 and not have a history of usage.



item code	name (read-only)	current cost per unit (read-only)	new cost per unit	current quantity(read-only)	new quantity	serial-number	location	reason
AT001	Ceiling Fan	130	130	0	1	1232	Worksho	Found in a dusty corner of the warehouse (placeholder reason)
IS002	Arlec 9W Tri Colour Dimmable LED Downlights	6.71	6.71	0	5		Worksho	Found in a dusty corner of the warehouse (placeholder reason)
IS003	Reverse Cycle Split System Air Conditioner	1536	1536	0	2		Worksho	Found in a dusty corner of the warehouse (placeholder reason)
IS005	Magic Lamp	4	4	0	5	1232	Worksho	Found in a dusty corner of the warehouse (placeholder reason)
IS006	Incandescent Bulb	0.2	0.2	0	50		Worksho	Found in a dusty corner of the warehouse (placeholder reason)
IS010	Portable Generator	4	4	0	92		Worksho	Found in a dusty corner of the warehouse (placeholder reason)
IS011	LED Work Light	4	4	0	18		Worksho	Found in a dusty corner of the warehouse (placeholder reason)
IS012	Safety Helmet	4	4	0	10		Worksho	Found in a dusty corner of the warehouse (placeholder reason)
IS013	Drill Set	4	4	0	100		Worksho	Found in a dusty corner of the warehouse (placeholder reason)
IS014	Cordless Drill	12.5	12.5	0	79	4324	Worksho	Found in a dusty corner of the warehouse (placeholder reason)
IS015	Extension Cord	4	4	0	80		Worksho	Found in a dusty corner of the warehouse (placeholder reason)
IS016	Paint Brush Set	4	4	0	10		Worksho	Found in a dusty corner of the warehouse (placeholder reason)
IS017	Screwdriver Set	4	4	0	160		Worksho	Found in a dusty corner of the warehouse (placeholder reason)
IS018	Circular Saw	32	32	0	200	42324	Worksho	Found in a dusty corner of the warehouse (placeholder reason)
IS019	Welding Gloves	4	4	0	58		Worksho	Found in a dusty corner of the warehouse (placeholder reason)
ISM-P	Hardwood Planks (Lengths)	0.5	0.5	0	13		Worksho	Found in a dusty corner of the warehouse (placeholder reason)

Troubleshooting

- For tracked and serialised items, you must also provide the serial numbers of these items. Depending on your situation, it may be more time efficient to import just tracked and unserialised items by this method first to make sure you have the correct method, then doing the serialised items in a separate import. If you have a low number of serialised items to modify, you should modify them in the inventory item listing directly.

Export Items to CSV

This process will export all your items and the quantities on hand to a CSV file.

To run the export, navigate to **Inventory & Assets** > **View/Edit Inventory**. Click on the **Actions** button at the top right of the page and select **Export Items to CSV**. A CSV file will be generated and available from the downloads section of your browser.

Note

- The inventory export will contain all the fields necessary to import/update items as well as additional fields that detail the stock numbers. CSV imports will ignore fields that are not relevant to the type of import.
- For example, if you are exporting in order to bulk update inventory item details, the quantity fields will be safely ignored.

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