

Importing and Exporting Asset Data

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

Last updated on May 11th, 2023

Introduction

This process should be used when you'd like to import or export a bulk list of assets **that aren't on your fixed asset register in Xero**, or if you'd like to make bulk changes to assets previously imported into Gojee.

Importing Asset Data

The import process uses the asset name to assess whether the asset is new, or already exists. Hence, changes to asset names cannot be made in bulk, but all other asset fields can be updated.

To start an import, navigate to **Inventory & Assets, View/Edit Assets**. Click on the **Actions** button at the top right of the page and select **Import/Update from CSV**. You will be presented with the following modal:

Import asset list from CSV



Select File

No file selected.

1. Download import template

Start by downloading our CSV (Comma Separated Values) template file. This file has the correct column headings gojee needs to import details of your items.

↓ [DOWNLOAD TEMPLATE FILE](#)

2. Copy your items into the template

Using Excel or another spreadsheet editor, fill the gojee template with the details of your items. Make sure the item details match the column headings provided in the template.

Important: Do not change the column headings in the template file. These need to be unchanged for the import to work in the next step.

Any asset that already exists by name (case sensitive) in gojee will be updated. Any new assets will be created in gojee.

Unit is limited to: *each, day, bag, hour, week, litre, millimeter, kg, half-day, kilometre, item, month, tonne, km/h, cubic-meter, degree, meter, milliliter, square-meter, kilowatt and lot.*

3. Import the updated template file

Save your updated template as .csv file and then click on the 'Select File' button at the top of the page to import your items into gojee.

Note: Once you select the file, an option to 'Upload' will appear at the top of the page. If there are no errors, the import will proceed. This action cannot be cancelled or reversed.

Follow the instructions in the modal to complete the import.

Exporting Asset Data 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 Assets**. Click on the **Actions** button at the top right of the page and select **Export to CSV**. A CSV file will be generated and available from the downloads section of your browser.

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