

Knowledge Base



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](#).

Add

Refresh

Actions ▾

 Filters ^

Import/Update Items

Export Items to CSV

Set Initial Quantities

Bulk Stock Adjustments

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:

Import inventory items from CSV

Select FileNo 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 item codes that already exist in gojee will be updated. Any new item codes will create new items in gojee. Tracked items must have an asset code defined in the import file. Do not choose locked Xero system accounts such as Accounts Payable as the import will fail. Xero accounts of type INVENTORY also cannot be selected (its recommended to use a CURRENT ASSET account instead). Separate items with the same name is not allowed.

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.*

Instance type is limited to: *tracked-per-instance, untracked and tracked-as-aggregate-qty.*

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.

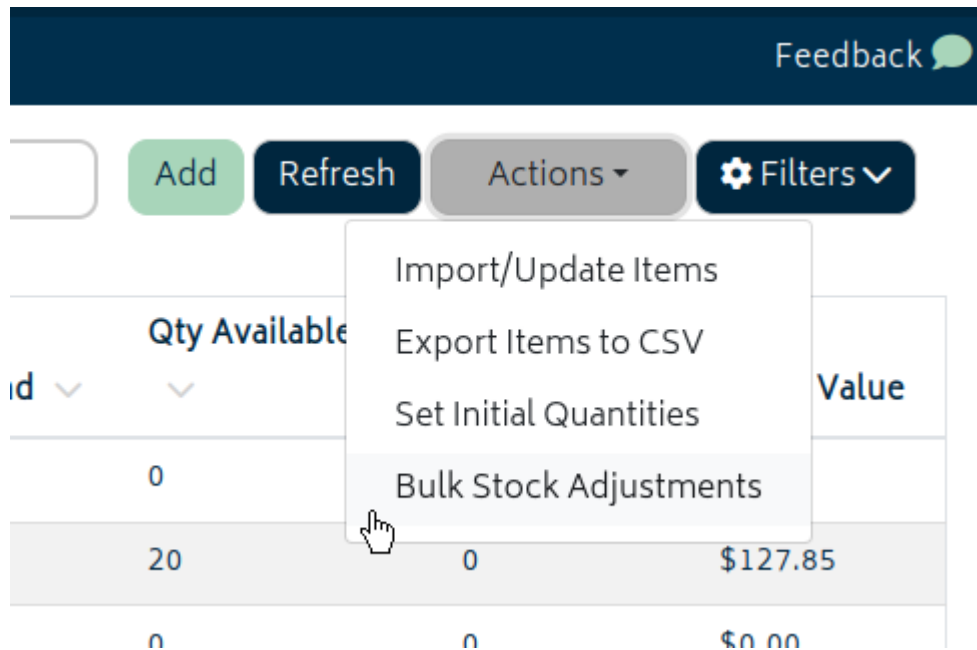
Troubleshooting

- 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.

Create bulk stock adjustments from CSV

Select File

No file selected.

This function will perform bulk stock adjustments and create a manual journal in xero reflecting these adjustments

1. Export the template

[Click here to export the bulk stock adjustment template file](#)

2. Modify stock adjustment quantities

Using Excel or another spreadsheet editor, modify the **new quantity on hand** column for the rows you want to change. For any item you do not want to change, simply delete those rows from the export file. Make sure the item details match the column headings provided in the template.

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

3. Import the updated template file

Save your updated template file as a .csv file and then click on the 'Select File' button at the top of the page, and then 'Upload'. Gojee will read your file and provide a summary of the actions that will occur. If you are ok with these changes, simply hit the 'Confirm' button and the import will proceed.

Note: Once you hit 'Confirm', the action cannot be cancelled. You will be provided a link to the manual journal once the import is complete.

Confirm

Cancel

- 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.

A	B	C	D	E	F	G	H	I	J	K	L	M
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	4324	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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