# Using the Import and Mass Update Functions

Importing batches of data rather than entering data one item at a time, makes sense when adding a new product line or group of suppliers. Mass update functions speed up the process to alter customer records or review price changes.

## Objectives

- Using the Import Function
- Using the Mass Update Function
- Viewing Alerts and Mass Update History

## Using the Import Function

The *Import* function allows you to import products, suppliers, customers, categories, and price changes. Let's look at how to import products since the process is similar for the other files.

From the main menu, select *Products* and then choose *Products* again.

If your preference is set to open maintenance pages in *form* view, select the *Table View* button. Select the *Actions* drop-down menu on the top right corner of the screen and then select *Import*.

The *Import Product Information* pop-up appears. The *Select Store(s)* field defaults to All. If you have multiple locations, you can identify which locations to update.

Select *Download Template.* This will download an *Excel* file.

When you open the file, you will see all the information fields available for products. Simply copy or enter your data into the file and save it on your computer. It's a good idea to save the file with today's date, so if someone needs to verify what was imported, it's easy to do.

Then return to the import screen. Select *Upload File*. Locate the file on your computer and click *Open.*

You'll see a message stating that the data upload has been submitted, and you'll receive an *alert* when it is completed. Select *Close.*

Check out the *Alerts Viewer* to view the file import notification. Here, you can download the alert in the *Action* column on the grid.

You can use the same procedure to import suppliers, customers, categories, and price changes. The action menu for each is found on the related page.

# Using the Mass Update Function

With the mass update function, you can easily edit products or customer information in bulk.

From the main menu, select *Product**s*** and then choose *Products* again.

If the page displays in form view, select the *Table View* button.

Use the search box and filters to locate a specific item or group of items. To view all items, click *Search.*

Select the check box next to each item that you want to update. If you want to select all items, click the top check box.

Select the *Actions* drop-down menu, and then select *Mass Update***.**

Here you can identify the fields you want to update. We'll select *Category.* Select a value from the drop-down list.
This will update all of the selected items with this category.

If you select *Tags* or *Store Tags,* a pop-up is displayed. To add a new tag, select the Add button. Enter the value in the field.

If you wish to remove an existing tag, enable the *Remove* radio button, and select *OK.*

The value you remove will appear with a strikethrough in the *Product Mass Update* screen.

You can also enable the *Remove All Tags?* toggle if you wish to remove every tag added for the selected items.

If you enable this toggle, the *Clear Fields* box is automatically checked in the mass update screen, which implies that all the tags will be removed.

To delete a tag, check this box and select the *Delete* button. Once you've made the changes, select *OK***.**

If you select *Location,* the *Location* pop-up is displayed. To add location, select the *Add* button and enter the location code *here*. Under *Actions,* from the drop-down list, you can select *Remove* or *Update*.

If you choose to remove a value, it will appear with a strikethrough in the **Product Mass Update .**
Switching on the *Primary* toggle next to the location code will set the entered location as the main location.

Select *OK* to save the changes.

To clear the value for a field, check *this* box. Note that this checkbox will be disabled for mandatory fields.

If you picked a field you didn't want, select this to remove it.

Once you are sure that all the fields you are updating are correct, select *Update.*

There is no undo button so you would have to reverse any errors. Confirm the update by clicking *OK.* Your items are submitted for processing, and you will receive an alert when the changes are complete.

You can follow the same procedure to update customers.  The action menu for each is found on the related page.

## Viewing Alerts and Mass Update Function

To view the alert, select this icon on the top right corner of the alerts screen.

In the *Alert* drop-down menu, select *Task Completion* to look for the product mass update alert.

Select *this* to view the alert details. In the pop-up select *Download File* or in the *Alerts Viewer* click *this* icon, to download the alert details. An Excel sheet will be downloaded.

To view the mass update history, select *Products* and then choose *Activity.* Selec*t Mass Update History***.**

Use the following filters to refine your search. Select Search to view the result.

The general information is displayed in the grid. To export the batch information to Excel, check the required box and select the *Export to Excel* button. To view any batch information in detail, select the *Mass Update History Detail* button.

In the grid, you'll see the old as well as the new field values, alongside the item name, number, description, and store.

Here you can export or print labels.

## Recap

With these functions, you can easily add or edit information in bulk. You can also review the change history.

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