Importing Categories for your Custom Codes

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If you're on a paid plan, you can submit a ticket for assistance.

If you're still in implementation be sure to check with your implementation specialist.

You can also check with your account manager.

You can use a basic CSV (comma-separated value) file with custom category information.

There must be a header row that defines what data is in each column. All fields are required.

The header fields should cover columns A - J. They are split out for easier viewing.

	Code	Quantity	Description	Note
1	12345	1	foo	bar
2	66666	1.2		
3	00001			

Sales Tax Applicable	Price	Price With Tax	Cost
FALSE	10	0	0
TRUE	12	13	

Duration	Type of Product
15	service
	product