Importing Categories for your Custom Codes

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If you're on a paid plan, you can submit aticket 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