

BULK IMPORT



OVERVIEW

STEPS

Go to **Global Settings**, click **Import/Export**.

On the Import/Export page, select the **Materials** tab.

Click **Export All Material Records** to download a .csv file containing your full list of material items.

Open the downloaded **AllMaterialItems.csv** file.

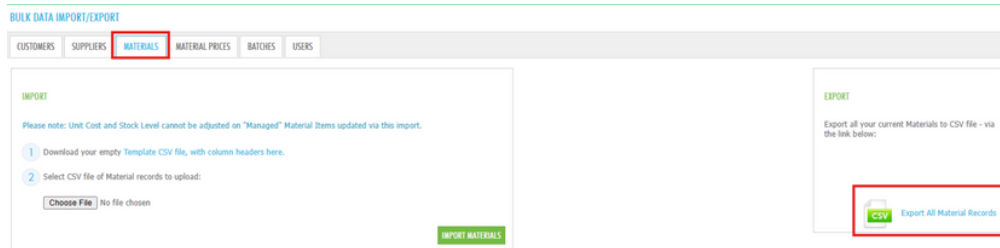
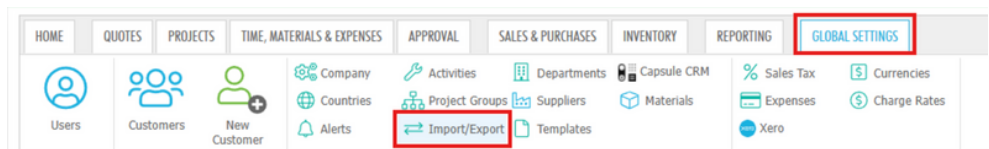
Locate the **"Managed"** column and enter **"Y"** for each item you want to set as managed.

In the **"Stock Level"** column, enter the current quantity for each of those items.

Note: A stock level is required for the managed status to be applied successfully.

How to bulk update unmanaged materials to managed

This guide walks you through the process of bulk updating **"unmanaged"** material items to **"managed"**, helping you maintain a consistent audit trail and ensure all stock movements and unit costs are accurately tracked, both within TidyStock and in your Xero accounting system. Managed items are best for businesses that need full traceability and integration with financial reporting, while unmanaged items allow for more manual flexibility.



| | A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | | | |
|---|-------|------------|-------------------------|------------|-----------------|------|---------|---------|-------|--------|------|-----------|----------|-------|----------|--------------------|-------------|----------------|-----|
| 1 | Code | Material A | Material C | Descriptio | Suggested Usage | Unit | Pricing | Un Cost | Curre | Charge | Cu | Unit Cost | Unit | Charg | Referenc | Managed (opts:Y,N) | Stock Level | Location | SKU |
| 2 | 3 | BARCODE | Miscellaneous Materials | | ITEM | ITEM | GBP | GBP | | | | | N | | | | 0 | Main Warehouse | |
| 3 | 10LDM | Box 10 Lit | Stationery | | Office Dep | ITEM | ITEM | GBP | GBP | 39.09 | 9091 | 45 | R0010LDN | Y | | | 33 | Main Warehouse | |
| 4 | 10LSG | 10 Pack Ta | Stationery | | Office Dep | ITEM | ITEM | GBP | GBP | 8 | 9 | | N | | | | | Main Warehouse | |
| 5 | 1MMST | 1MM Prin | Quality Printing | | Print n Coj | mm2 | m2 | GBP | GBP | 10 | 12 | | N | | | | | Main Warehouse | |
| 6 | 1X1 | Narrow 1r | Banners | | Banner Mi | mm | m | GBP | GBP | 2 | 2.5 | | N | | | | | Main Warehouse | |
| 7 | 1X2 | Narrow 2r | Banners | | Banner Mi | mm | m | GBP | GBP | 3.698 | 3.5 | | N | | | | 13 | Main Warehouse | |
| 8 | 20LDM | Box 20 Lit | Stationery | | Office Dep | ITEM | ITEM | GBP | GBP | 60 | 75 | | N | | | | | Main Warehouse | |
| 9 | 2LDS | Double Le | Stationery | | Office Dep | ITEM | ITEM | GBP | GBP | 26 | 29 | | N | | | | | Main Warehouse | |



BULK UPDATE UNMANAGED MATERIALS TO MANAGED



Save the updated .csv file.

Return to TidyStock, *click Choose File*, and upload your updated .csv.

Click **Import Materials** to apply your changes.

Tips for a smoother process:

- Delete rows for items you're not updating to keep the file clean and import faster.
- Test with 2–3 items first to confirm everything works before updating in bulk.

BULK DATA IMPORT/EXPORT

CUSTOMERS

SUPPLIERS

MATERIALS

MATERIAL PRICES

BATCHES

USERS

IMPORT

Please note: Unit Cost and Stock Level cannot be adjusted on "Managed" Material Items updated via this import.

- 1 Download your empty [Template CSV file](#), with column headers here.
- 2 Select CSV file of Material records to upload:

Choose File

→MaterialItems (2).csv

IMPORT MATERIALS

EXPORT

Export all your current Materials to CSV file - via the link below:

CSV

Export All Material Records