Rundoo

GETTING STARTED WITH RUNDOO · SETUP

Bulk Edits (Import & Export)

> Export, edit, and import to update hundreds of records at once.

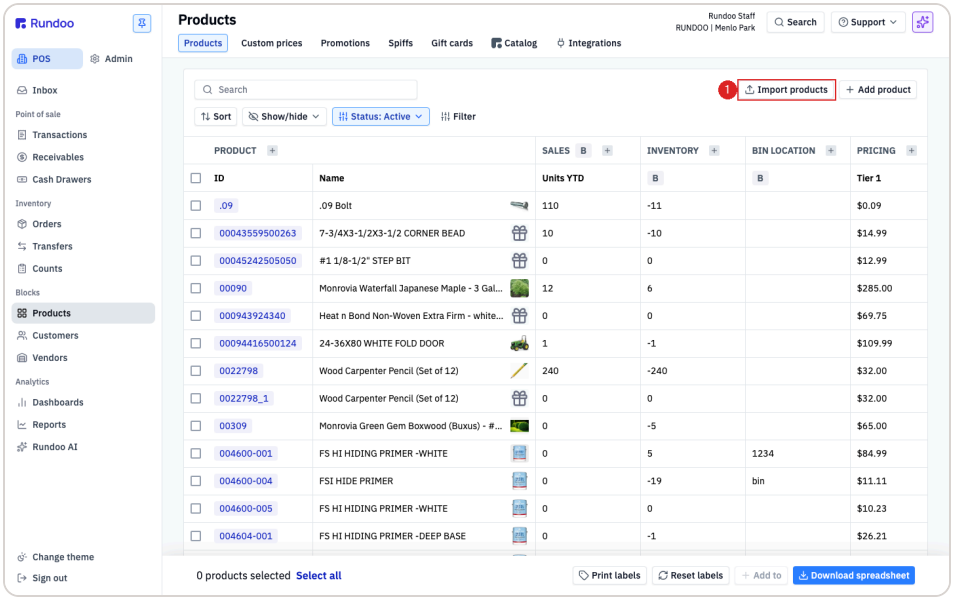
Step-by-step walkthrough ~3 min read Companion to the 4:33 video

Some days you need to change hundreds of products at once. A vendor sends a new price list for their whole line, or you want to tag a group of items for a spring promotion. Doing that one product at a time would eat your whole afternoon. Rundoo has a faster way: filter your list, export it to a spreadsheet, make your edits, and import it back so every change lands together. The same rhythm works for your Customers and Vendors, too.

HOW THE LOOP WORKS

Filter, export, edit, import

Everything happens from a block in **POS** mode: **Products**, **Customers**, or **Vendors** in the left sidebar. Two buttons do the heavy lifting: **Download spreadsheet** at the bottom of the list pulls your records out to a file, and **Import products** at the top-right brings your edited file back in.



The Products list. Export from **Download spreadsheet** (bottom-right), bring the file back with **Import products** (top-right).

DO THIS

Bulk changes, step by step

1 Filter the list before you export

This is the trick that keeps the job small: filter down to only the records you plan to change. On **Products**, use **Filter** to narrow by **Default vendor**, by **Department**, or by a tag. Say you filter to just your Benjamin Moore products, so the list shows only those items.

2 Export just those records

Click **Download spreadsheet** at the bottom of the list, then **Download file**. The download respects your filter, so you get a spreadsheet of only the records you filtered to. Rundoo pre-fills the **Token** column for each one, which is what tells it to update those exact records later.

3 Open the file and leave column A alone

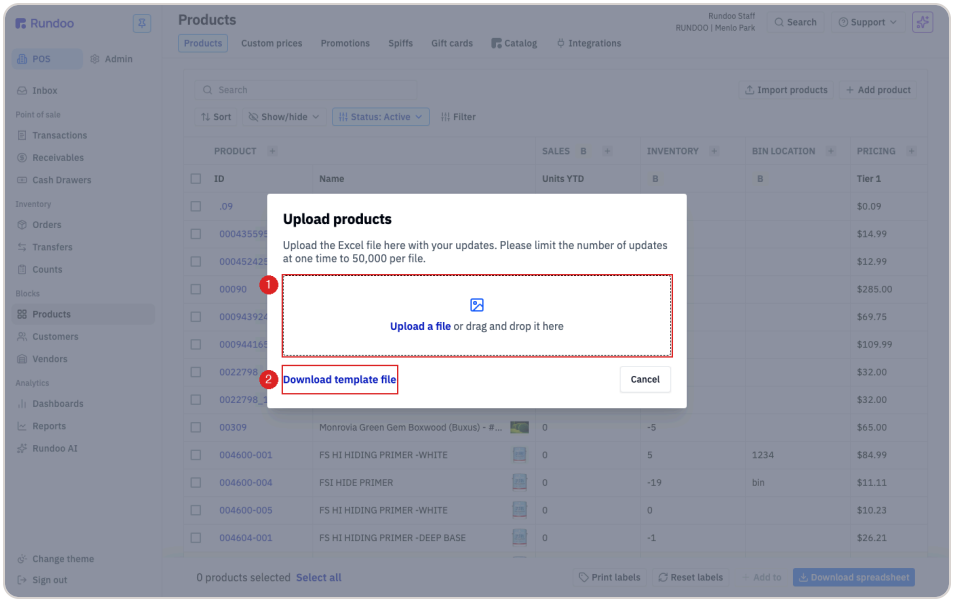
Open the **.xlsx** in Excel, Numbers, or Google Sheets. The most important column is the very first one, column A, called **Token**. That is Rundoo's private ID for each record, and it is how Rundoo knows which one to update. Do not change anything in that column. Its header even says so: *"DO NOT CHANGE THIS FIELD."* Leave the data on the sheet named **Sheet1**, and if you save from another program, save it back as **.xlsx**.

4 Edit only the cells you want to change

Find the column you care about and edit just those cells. To tag your filtered list, type your tag into the **Tags** column and fill it down every row. Leave the other columns blank. Blank cells are not a problem, Rundoo simply ignores them and will not erase your existing data. Hover any header cell for a note on what that column does and an example value.

5 Import the file back in

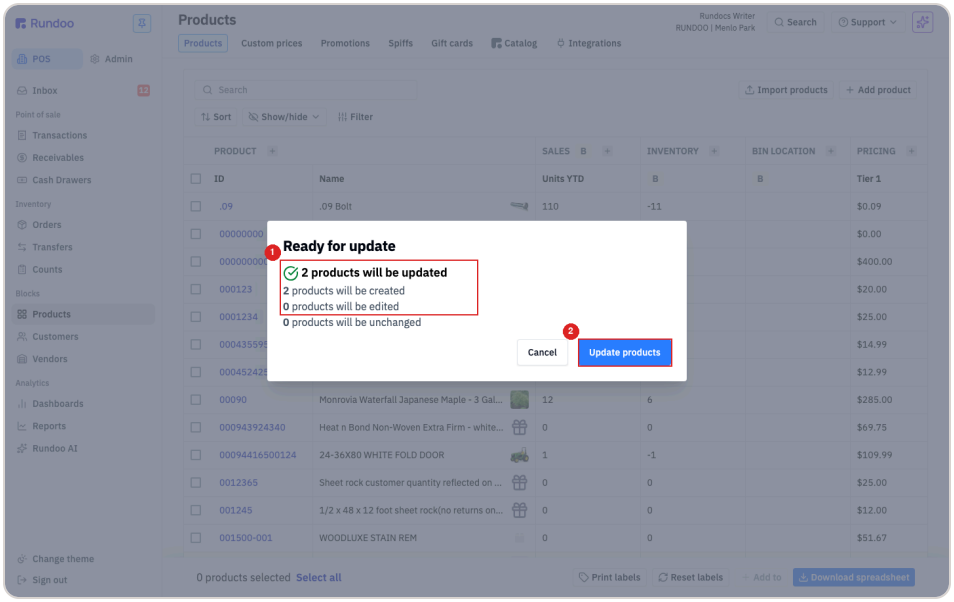
Save your file, then click **Import products** at the top-right of the list. Either click **Upload a file** and pick it, or drag the **.xlsx** straight onto the dashed drop-zone. (Need a fresh blank sheet to create brand-new records? **Download template file** lives in the same window.)



Drop the file on the zone, or click **Upload a file**. The uploader takes **.xlsx** only.

6 Read the preview, then commit

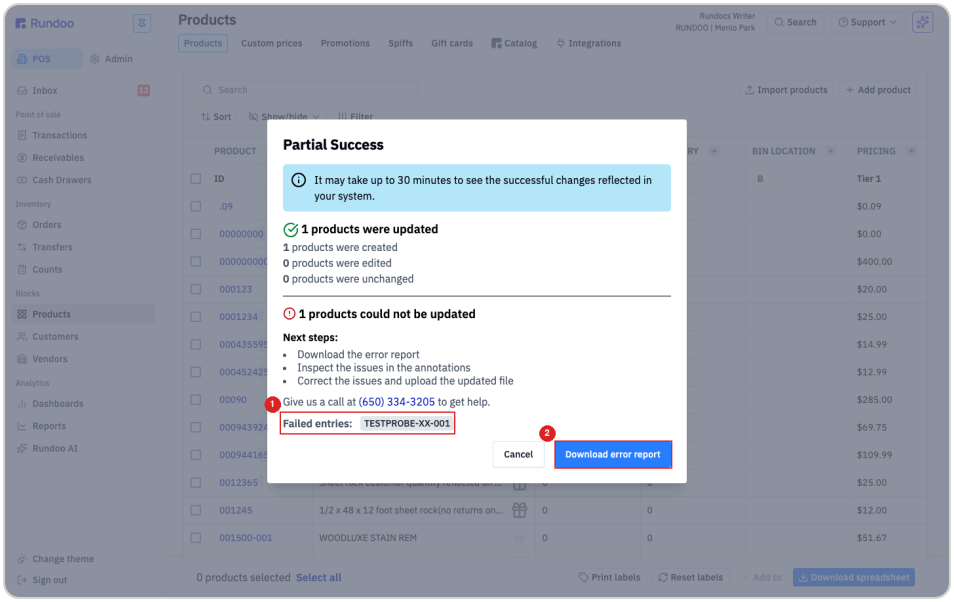
Rundoo checks the file and shows a **Ready for update** preview: how many records will be updated, created, edited, and unchanged. Nothing has posted yet, so this is your final gut-check. If the counts match what you meant to do, click **Update products**. If a number looks off, click **Cancel**, fix the file, and try again.



The **Ready for update** preview. Read the counts before you click **Update products**.

7 When something is off, the report tells you where

If a row does not pass, Rundoo lands the good rows and lists the rest under **Failed entries** by their ID. Click **Download error report** to get those rows back as a fresh spreadsheet, with a comment on the exact cell that needs fixing (a mistyped department, an ID already in use, and so on). Fix just those cells, save, and re-upload the report as a follow-up. The rows that already landed are safe.



A partial result flags the failed rows by ID and hands you a **Download error report** so you know exactly what to fix.

KEEP IT HANDY

The rules that keep you safe

COLUMN A: TOKEN

Never edit it

Filled = update, blank = create a new record.

FILE TYPE

.xlsx only

Keep the data tab named Sheet1.

BLANK CELLS

Ignored, not cleared

To empty a field, clear it on the detail page.

ON-HAND INVENTORY

Read-only on import

Change stock with a count, not the sheet.

Good to know

- There is no one-click undo, so keep a copy of your original file before you import. If something goes sideways, you can re-import the good version.
- Big change coming? Test with a small batch first. Five rows will catch a wrong column or a typo'd value faster than five thousand will.
- Changes can take up to 30 minutes to show throughout your system, so give it a beat before you go double-checking.
- This same filter, export, edit, import rhythm works for your **Customers** and **Vendors** lists too.