Data import - Importing product data

A comprehensive guide to importing product data. This process populates the product catalog in bulk, streamlining order creation and ensuring consistency in descriptions and units of measure.

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Importing product data allows a business to quickly populate its product catalog in Qargo. This is highly beneficial for organizations that transport a defined list of items. It streamlines the order creation process and ensures consistency in descriptions and units of measure. This article outlines the specific requirements, best practices, and common issues related to importing product data.

📖 Key terminology

For clarity throughout this guide, the following terms are defined.

- **ADR:** The **European Agreement concerning the International Transportation of Hazardous Materials by Road**. This treaty governs the safe transport of hazardous materials (HazMat) across international borders. It establishes regulations for their packaging, labeling, and documentation.
- **Product:** A specific item or commodity that can be added to an order and transported.
- **Product type:** A high-level classification used to group products with shared characteristics, such as packaging or form factor. For example, a single product type like **'Box'** can contain multiple individual products.

✅ Critical import requirements for products

Before importing product data, the following requirements and warnings must be considered to ensure data integrity.

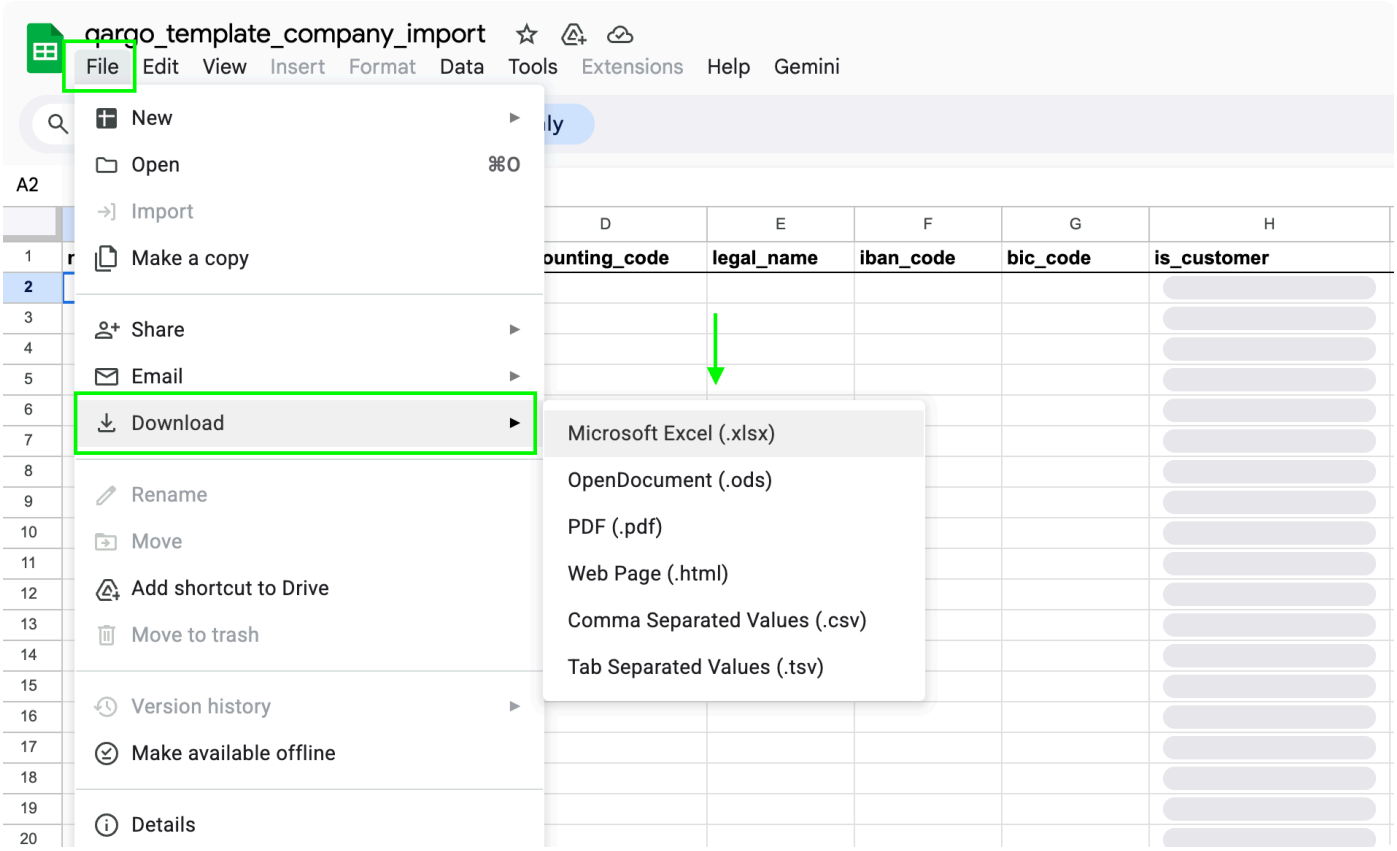
- **Code:** Each product must have a unique **Code**. The import will fail if a duplicate code is detected within the import file or if it already exists in the Qargo system.
- **Mandatory fields:** The product **Name** and **Type** are mandatory fields. An import will fail if either of these is left blank.

🛠️ Step-by-step data import process

Step 1: Download the template

A specific spreadsheet template is available to upload product data. **To edit and upload the data, a copy of the template must be downloaded:**

1. Click the link: Product data import template
2. Once the template opens, go to **File** and select **Download**
3. Save the template **(in .xlsx or .csv format)** to the computer and begin entering the company data.



📚 Always use a blank template downloaded directly from here or provided by the Qargo team. Reusing an old template may lead to import errors

Step 2: Fill in the Excel template

Open the template and populate it with the required data. The template contains column headers that correspond to the fields in Qargo.

- **Required fields:** Fill out all the required fields (a comprehensive list of required fields can be found in the next section of this article). An import will fail if these fields are left blank.
- **Formatting:** Pay close attention to the specified data format (e.g., dates, numbers, text).

Step 3: Submit for upload

1. **During onboarding:** Work directly with the **onboarding manager** to upload the initial business data. The onboarding manager guides the process and ensures a successful import.
2. **After onboarding:** For all future data updates and imports, contact the **account manager**. The account manager assists with the upload process and provides ongoing support.

📝 Details of the product import template

The following table provides a detailed, field-by-field explanation of the Excel template for product import. It includes data formats, required fields, and best practices for populating each column.

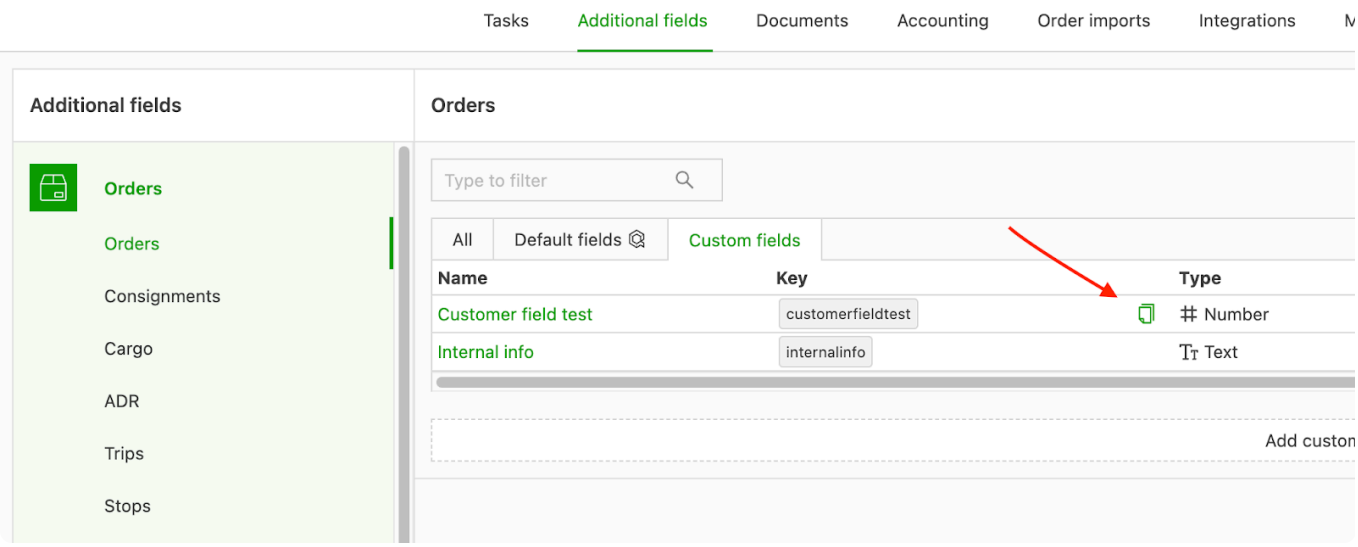
Column name	Required/optional	Remarks	Example
name	Required	Product name displayed in Qargo	Aardappelen
description	Optional		
code	Optional		
product_type_name	Required	Product type configured in Qargo. One product type can have multiple products.	
adr_internal_code	Optional	ADR internal code assigned to the product.	
adr_edition	Optional	Edition of the ADR regulations.	
adr_class	Optional	ADR hazard class of the product.	
un_number	Optional	United Nations (UN) number for the hazardous material.	
packing_group	Optional		
specific_gravity	Optional	Specific gravity of the product.	
absolute_min_temperature	Optional	Lowest temperature the product can handle.	
absolute_max_temperature	Optional	Highest temperature the product can handle.	
loading_meters	Optional	Space the product occupies in loading meters.	
pallet_spaces	Optional	Number of standard pallet spaces the product occupies.	
actual_pickup_temperature	Optional	Actual temperature of the product at pickup.	
actual_delivery_temperature	Optional	Actual temperature of the product at delivery.	
custom_fields__example	Optional	To import custom field values. Note: the format uses a double underscore (`__`) to connect the prefix **custom_fields** to the unique field ID	

🔎 Troubleshooting common product import errors

This section addresses specific errors that may arise during the import of product data.

- **Duplicate product code:** The most common error occurs when a product **Code** in the template already exists in Qargo. Each code must be unique.
- **Missing mandatory fields:** The import will fail for any row where the product **Name** or **Type** is left blank.
- **Sheet name:** The sheet in the Excel template file must be named exactly **'Import'**. Any other name will cause an error when uploading the file.
- **Case-sensitive column headers:** Column headers must be entered with the correct casing (e.g., `vat_number`, not `VAT_number`). Incorrect casing causes the data in that column to be silently ignored and not imported, as the system will not recognize the header.

- **Leading apostrophe errors:** Data in a cell cannot begin with an apostrophe (’). If an apostrophe is used, the system will not recognize the value, and an error may occur. **This rule is waived only if the article explicitly instructs that an apostrophe should be used for a specific field.**
- **Custom fields:** The column name must follow the convention **custom_field__[ID]** (the double underscore must be kept to connect the prefix **custom_field** to the unique field ID). The specific ID is retrieved from the Qargo organization settings. Click the copy button next to the custom field to copy its ID:



✨ Best practices for importing products

To ensure a smooth and accurate import, consider the following best practices.

- **Maintain consistent units:** Using a standard and consistent set of units of measure for all products ensures accuracy and avoids confusion during order creation.
- **Test with a small batch:** It is recommended to first test the import process with a small sample of 5–10 products. This verifies that the data is formatted correctly before uploading a full catalog.

➡️ What to do next

Once products have been successfully imported, they are available for use within the platform. The next logical step is to begin creating new orders and selecting these products from the catalog.

📈 Use cases for product import

Importing product data is an invaluable tool for several key business processes.

- **Populating the catalog:** The primary use case is to populate an entire product catalog in bulk. This ensures all commonly transported items are available in the system.
- **Simplified order creation:** A predefined list of products allows dispatchers and sales teams to create orders more quickly and accurately. They simply select from a list rather than manually entering product details each time.