Imports & Bulk Operations

Import, export, update, edit, or retire many item and stock records safely.

- Import Items
- Import Item Stock
- Import or Export Item Categories
- Bulk Update Items
- Bulk Edit Items
- Bulk Delete Items

Import Items

How to Import Items in Muhasib ERP

Overview

This guide will help you validate and import a controlled batch of item masters without duplicates or unintended stock.

The importer can create many item and related records. If an import stops because of an error, check which records were saved before trying again.

Who can do this

You need access to Item import and needed Item Add/supporting-master permissions.

Before you start

Back up the database. Export/get the exact target-build template. Create referenced units, categories, brands, taxes, locations, and accounts. Use a small synthetic pilot.

> Before saving, check that the correct company is open and that you have permission to complete this task.

Where to find it

Back Office → Items & Advanced Inventory → Item Bulk Import/Import Items.

Import Items

Step 1: Use the unmodified target template and headers

Step 2: Populate required identity and referenced-master values

Step 3: Check unique barcode/SKU policy, numeric/date/boolean formats, decimals, price/tax, item type,

Check unique barcode/SKU policy, numeric/date/boolean formats, decimals, price/tax, item type, and stock flags.

Step 4: Keep opening quantities out unless the template explicitly supports and

Keep opening quantities out unless the template explicitly supports and the workflow is approved.

Step 5: Import a small pilot file

Step 6: Review validation/errors and resulting records

Step 7: Correct the source file, not partially imported records, unless the

Correct the source file, not partially imported records, unless the rerun policy is known.

Step 8: Import the approved batch once

Check your work

Compare source-row count to created/skipped/failed rows; check duplicates, master links, prices, taxes, locations, stock, and accounts.

> Take a moment to check your work before closing the window. This small check can save time later.

If something goes wrong

- Stop after partial failure until rerun/deduplication is understood.

- Never import production data first as the test.

Related guides

- Plan Your Item and Inventory Setup
- Import Item Stock
- Bulk Edit Items

What to do next

> **Plan Your Item and Inventory Setup**.

Import Item Stock

How to Import Item Stock in Muhasib ERP

Overview

This guide will help you import approved item quantities by location/batch and compare and confirm the resulting inventory.

The import changes recorded inventory and may affect valuation/accounting depending on implementation.

Who can do this

You need access to Import Item Stock plus inventory/location and needed financial permissions.

Before you start

Back up the database, freeze stock movement, get a physical/source schedule at one timestamp, and create all items, units, locations, batches/serials, fiscal year, and accounts.

> Before saving, check that the correct company is open and that you have permission to complete this task.

Where to find it

Back Office → Items & Advanced Inventory → Import Item Stock.

Import Item Stock

Step 1: Use the target-build template

Step 2: Map each row to one item, unit, location, and batch/serial scope

Step 3: Validate quantity, cost, date, identifiers, and duplicates

Step 4: Import a small pilot into a restored snapshot

Step 5: Review errors and determine whether any rows committed

Step 6: Restore, correct, and import the approved final file once

Step 7: Resume stock movement only after reconciliation

Check your work

Compare and Confirm every file total with Stock Report, Stock Ledger, batch/serial inquiry, location totals, valuation, and GL where needed.

> Take a moment to check your work before closing the window. This small check can save time later.

If something goes wrong

- Do not rerun an uncertain file.
- Do not offset duplicates with unexplained negative rows.

Related guides

- Create Item Opening Stock
- Import Items
- Review Item Stock by Location and Batch

What to do next

> **Create Item Opening Stock**.

Import or Export Item Categories

How to Import or Export Item Categories in Muhasib ERP

Overview

This guide will help you export category data for review or import an approved hierarchy without duplicate or circular parents.

Imported categories become available to Item master, POS filters, and reports. Whether existing rows update or duplicate depends on matching behavior.

Who can do this

You need access to Import/Export Item Category and needed category add/update rights.

Before you start

Back up the database and get the target-build template. Define unique names, parents, ordering, and colors.

> Before saving, check that the correct company is open and that you have permission to complete this task.

Where to find it

Back Office → Items & Advanced Inventory → Import / Export Item Category.

Import or Export Item Categories

Step 1: Export existing categories when preparing an update/reference

Step 2: Preserve headers and data types

Step 3: Validate each parent exists or is created in supported order

Step 4: Remove self/circular relationships and duplicate names

Step 5: Import a small pilot

Step 6: Review results and restore before final import when needed

Check your work

Compare row counts/hierarchy/colors and assign each test category to an item; check filters/reports.

> Take a moment to check your work before closing the window. This small check can save time later.

If something goes wrong

- Do not assume exported database IDs are portable between databases.
- Stop on partial hierarchy creation.

Related guides

- Create an Item Category

- Import Items
- Review Item-wise and Category Sales Analysis

What to do next

> **Create an Item Category**.

Bulk Update Items

Bulk Update Items

Overview

This guide will help you apply one approved field/value change to a reviewed set of items.

Muhasib changes the chosen field across selected items. The operation may not be atomic and can affect pricing, tax, category, stock policy, or transaction selection.

Who can do this

You need access to Item Bulk Update and needed Item Update rights.

Before you start

Back up the database. Define the exact filter, expected item IDs/count, field, new value, and rollback value. Close related forms.

> Before saving, check that the correct company is open and that you have permission to complete this task.

Where to find it

Back Office → Items & Advanced Inventory → Item Bulk Update.

Bulk Update Items

Step 1: Filter/select candidate items

Step 2: Export or record selected stable IDs and current values

Step 3: Confirm selected count and company scope

Step 4: Choose one supported field and approved value

Step 5: Preview when available

Step 6: Execute once and preserve the result message

Step 7: Reopen a sample and relevant reports

Check your work

Compare before/after counts and values for every selected ID; check no unselected item changed and test downstream behavior.

> Take a moment to check your work before closing the window. This small check can save time later.

If something goes wrong

- Stop if selected count differs from expectation.
- Restore from backup rather than applying an unverified inverse bulk change.

Related guides

- Bulk Edit Items
- Update an Item Safely
- Create and Verify a Manual Backup

What to do next

Bulk Edit Items.

Bulk Edit Items

Bulk Edit Items

Overview

This guide will help you review and edit different values across multiple item rows with a complete change record.

Multiple item records can receive different updates. Downstream consequences follow each edited field.

Who can do this

You need access to Item Bulk Edit and needed Item Update rights.

Before you start

Back up the database. Export stable IDs/current values and define approved changes row by row.

> Before saving, check that the correct company is open and that you have permission to complete this task.

Where to find it

Back Office → Items & Advanced Inventory → Item Bulk Edit.

Bulk Edit Items

Step 1: Apply a narrow filter

Step 2: Confirm every loaded item ID

Step 3: Edit only approved cells

Step 4: Validate barcode uniqueness, prices, discounts, taxes, category, stock/location, parent/variant, and

Validate barcode uniqueness, prices, discounts, taxes, category, stock/location, parent/variant, and account relationships.

Step 5: Review the entire grid

Step 6: Save once

Step 7: Preserve validation/errors and check for partial commits

Check your work

Compare every approved before/after row and test representative Item, POS, Purchase, stock, tax, and report behavior.

> Take a moment to check your work before closing the window. This small check can save time later.

If something goes wrong

- Do not paste columns from a differently sorted sheet.
- Restore if partial persistence cannot be reconciled.

Related guides

- Bulk Update Items
- Import Items
- Update an Item Safely

What to do next

Bulk Update Items.

Bulk Delete Items

Bulk Delete Items

Overview

This guide will help you remove only the specifically approved, unused item records while preserving stock and transaction integrity.

Multiple masters and potentially related detail rows can be removed. Recovery may require database restore.

Who can do this

You need access to Item Bulk Delete/Item Delete and clear approval identifying the item set.

Before you start

Back up and restore-test the database. Export exact IDs. Prove zero stock and no transactions, orders, BOMs, variants, prices, serials, batches, integrations, or required history.

> Before saving, check that the correct company is open and that you have permission to complete this task.

Where to find it

Back Office → Items & Advanced Inventory → Item Bulk Delete.

Bulk Delete Items

Step 1: Load only the approved candidates

Step 2: Compare displayed IDs/count to the signed-off list

Step 3: Re-run dependency/stock reports immediately before deletion

Step 4: Remove any unapproved row from selection

Step 5: Execute once and retain the result/error list

Step 6: Do not rerun after partial success until remaining IDs are reconciled

Check your work

Confirm only approved IDs disappeared, historical data remains valid where expected, stock/GL compare and confirm, and no orphan relationships exist.

> Take a moment to check your work before closing the window. This small check can save time later.

If something goes wrong

- Prefer deactivation/retirement where available.
- Never bulk-delete to correct stock or reduce licence counts.

Related guides

- Retire or Delete an Item Safely
- Create and Verify a Manual Backup
- Restore a Muhasib Database Safely

What to do next

> **Retire or Delete an Item Safely**.