# Pay Item workbook upload/edit/download

Uploading data from Spreadsheets · https://paiyroll.com/kb/pay-item-workbook-upload-edit-download/

Follow this guide to download or upload pay item values using a multi-sheet workbook. You can create this workbook at any time in paiyroll®.

## Lookup by

First, decide how you wish to lookup (refer) to each worker in the first "A" column of your spreadsheet. paiyroll® offers 4 different lookup options:

1. **Username**
2. **works_id**
3. **Name** (Smith, John)
4. **Full name** (John Smith)

**work_id** is a typical choice. However, you may find it easier to use the full name as long as your company does not have two John Smiths'!

## New Pay Items

If you need to add *new* pay items to employees, it will be much easier to start with one Pay item on one worker first. Therefore, we strongly recommend that you create the new pay definition first and add it to one worker with a value, e.g., a test employee. If you are only needing to modify existing pay items, this step is not required.

## Create a Workbook

Tools > Create Pay Item workbook to run the 2-step wizard

1. Select the **Company** and **Lookup by**. You will typically not need to include **Tax Pay Items**; click **Create template**
2. On the summary page, click the **Download** button to create the workbook

## Edit the workbook

You will find the workbook in your downloads folder, named after your company name, arranged by Sheets according to the pay definitions. Edit or create the data you wish to upload using your spreadsheet program. You can add or remove sheets as needed, and note that you will select a specific sheet to upload.

If it is easier, you can copy any sheet into an existing workbook where you may have already calculated pay values. And you can also include additional worksheets to refer to your own calculations, for example, you may have a salary increment calculation sheet, and you can look up those values onto a different pay item upload sheet.

## Upload a Workbook

Tools > Upload Pay Item workbook to run the 3-step wizard

1. Choose the workbook **file**, select the **Company** and click **Upload file to server...**
2. On the Preview step, click the sheet (tab) you wish to upload to preview the first 3 lines of the sheet, then click **Pre-process selected data...**
3. On the Review step, carefully review all **New Pay item records** (top) and **Updated Pay item records** (bottom) noting there emay be multiple pages; If everything is correct, click **Publish...**

Your pay items will all be uploaded and modified and you can see them in the payout or in the payslips after a