Group Pricing Excel Import Export

Cavallo Support - 2025-07-09 - Sales

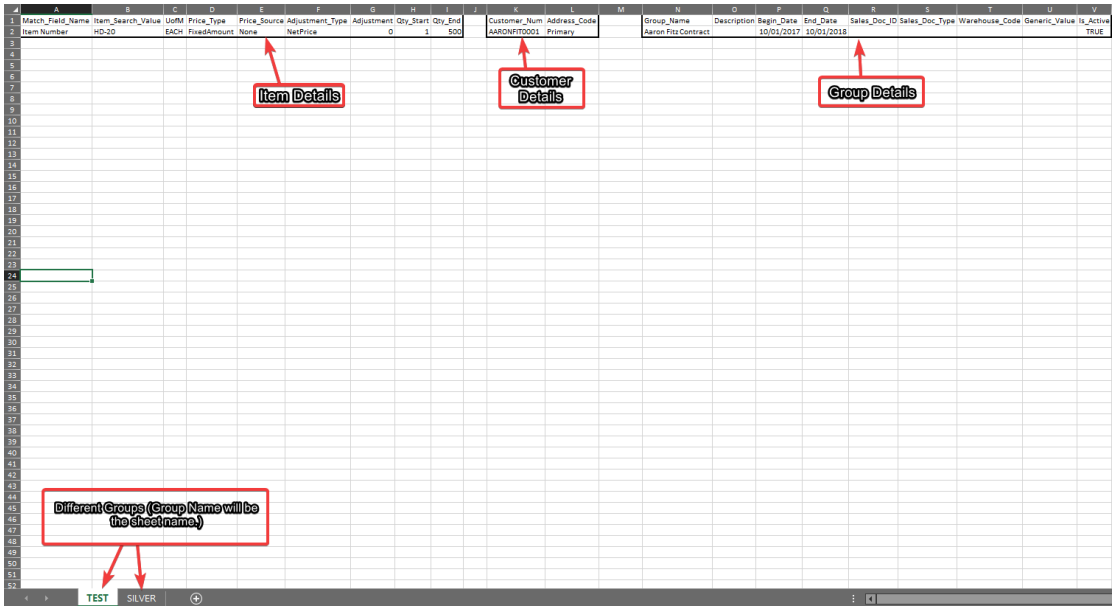
Overview

Group pricing excel import and export can be used to export/import group pricing records to and from Microsoft Excel spreadsheets.

Import Excel File Format

The Excel file must follow the specified format in order to be imported into SalesPad. See file attached below.

The Excel file for the import should look like this:



Each worksheet represents a group: the name of the sheet will be the group name. You may also specify the group name in the group details table (see below).

Each worksheet should have three separate tables, one for each data set that you want to import:

- Item Details (left)
- Customer Details (center)
- Group Details (right)

It is essential that each table has all the required columns:

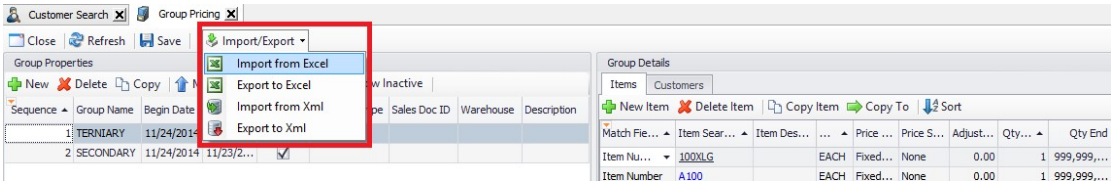
- Item Details
    - Match_Field_Name o Item_Search_Value o UofM
    - Price_Type
    - Price_Source
    - Adjustment_Type
    - Adjustment
    - Qty_Start
    - Qty_End
- Customer Details
    - Customer_Num
    - Address_Code
- Group Details
    - Group Name (optional – you can use the sheet's name to specify the Group Name)

- Description o Begin_Date o End_Date
- Sales_Doc_ID
- Sales_Doc_Type
- Warehouse
- Generic_Value
- Is_Active

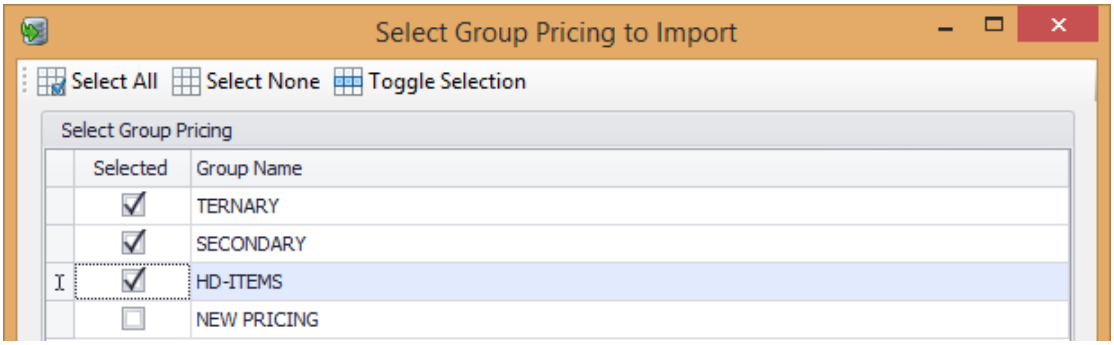
Note: Even if you do not need to import a particular data (for instance, Customer Details), you will still have to include the column headers (Customer_Num and Address_Code), you would just leave the table empty.

Importing Groups

Once you have an Excel file with the necessary data to import, choose Import from Excel from the **Import/Export** dropdown. This will prompt you for the Excel file you wish to import. If you're updating an existing group, the import file's columns Group_Name, Begin_Date and End_Date must match the group's columns in Salespad.



After selecting the Excel file to import, you will be prompt to choose the Groups (sheets) to import:



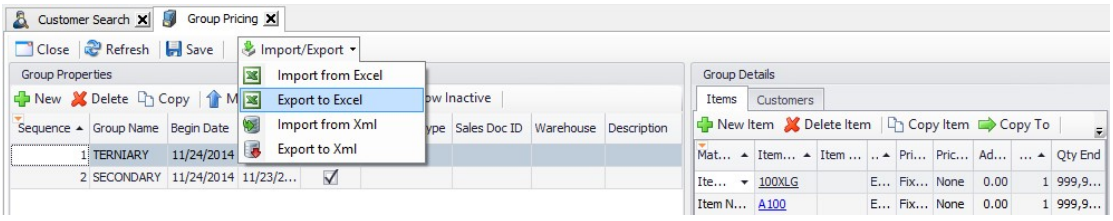
Once the import is finished, you will receive a confirmation message. The screen will automatically refresh to display the newly imported data.

The import will check to see if group pricing records exist and then update them if they do. If they do not exist, it will create new records. See details below:

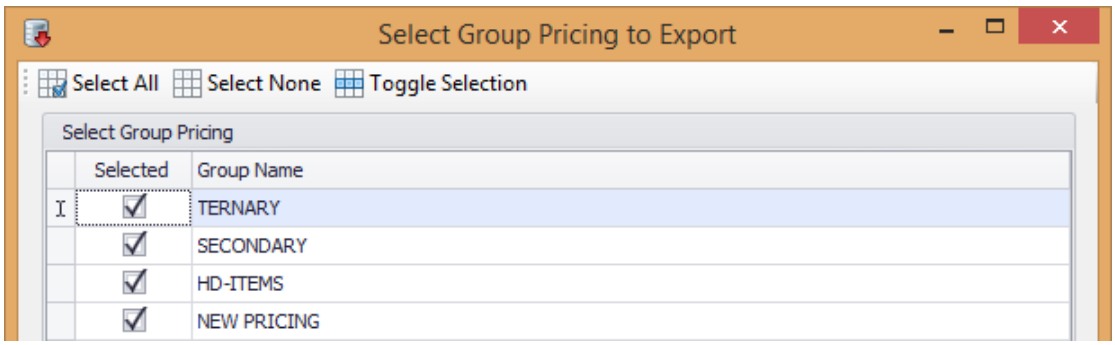
- Group Records – If a group with the same Group Name, Begin Date, and End Date exists in the system, it will update it.
- Group Item Records – If a group pricing item detail with the same Match Field Name, Item Search Value, UofM, Qty Start, and Qty End exists in the system, it will update it.
- Group Customer Records – If a group pricing customer detail with the same Customer Num and Address Code exists, it will update the record.

Exporting Groups

To export group pricing data select Export to Excel from the **Import/Export** dropdown from the group pricing maintenance window. You will be prompted for a filename and file location prior to exporting.



You will be able to decide which groups to export by selecting them in the export screen:



Attachments

- Group_Pricing_ImportTemplate.xls (30.00 KB)