Importing and Exporting Data from SalesPad Cloud

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Overview

SalesPad Cloud uses customizable grids to display data. Many of these grids (including each of the main grids for each module) support data imports and exports.

Note: Your QuickBooks Online integration imports your QuickBooks Online customers, items, vendors, and sales documents automatically.

To get started, open a module. In this example, we will be working in the Inventory module.

Importing Data

If you have data on a Microsoft Excel sheet, you can import that into SalesPad Cloud with just the click of a button. To make this process easier for you, we've created an Excel template that includes a column header for each available SalesPad Cloud column (for that module- each module has a different Excel template). It is not required that you use this Excel template, but it will make the import process go much more quickly.

Note: Excel imports are supported for customers, vendors, sales documents, inventory items, and adjustment in transactions. Item imports are capable of importing a maximum of 10,000 rows per sheet, and other imports may also have limitations as well. The team at SalesPad Cloud is working on expanding these limits.

You can also export data from SalesPad Cloud, update that data, and reimport your updated file.

To download the Excel template, first click the **Import** button in the upper right-hand corner.
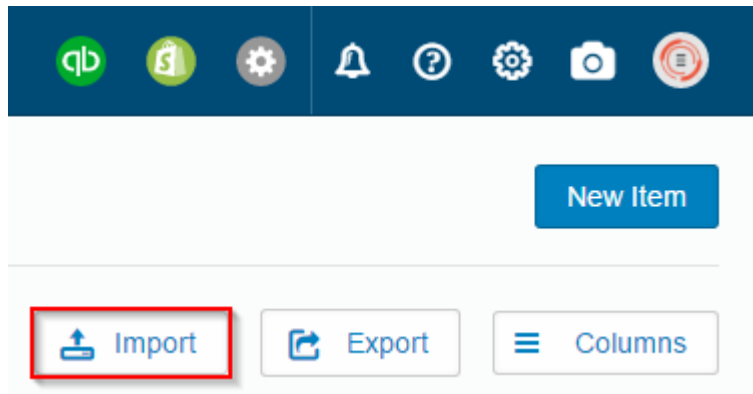
Click the **Download Excel Template** in the Import drawer that appears.
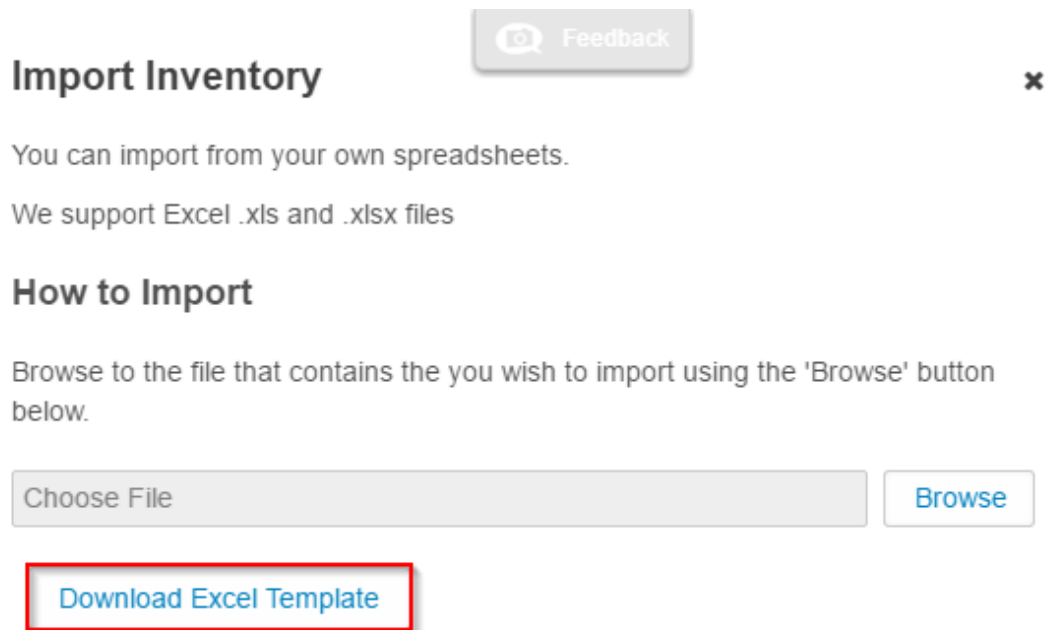
Once you're ready to upload your Excel sheet to SalesPad Cloud, click the **Browse** button in the Import drawer and select your Excel sheet from your local computer. Click **Next**.

The next screen allows you to assign each of the columns in your Excel sheet to a SalesPad Cloud information field pertaining to that column. If you're using the provided template, SalesPad Cloud will complete this step for you, because the column names will match these information fields exactly.

On the left-hand side of the screen, you will see a list of SalesPad Cloud import settings, which vary depending on what type of data you are importing fields, and SalesPad Cloud information fields (in this case, information fields found in the Create Item drawer). Each column name will have a dropdown next to it. Click the dropdown and select the column from your Excel sheet that you'd like to map to this information field.

If the mapping process was successful, your Excel sheet column header will turn green in the preview pane.

Note: Make sure you do not have blank spaces in the text of your excel sheet column headers. If you do, you won't see the data from your sheet displaying in the import window.

Repeat this process until you've assigned each of your Excel sheet columns to a SalesPad Cloud information field. If you want to import only some of the columns in your Excel sheet, uncheck the box next to the column name. You will see the column header in the preview pane turn back to blue.


When all of the columns in the preview pane are green (or all the columns you wish to import), you are ready to import your data. Click **Import** in the bottom right-hand corner of the screen.

Make sure the Quick Validation Before Uploading box is checked. SalesPad Cloud will run a check on the data to make sure there aren't any problems with the import. If a problem is found, you will be given the option to fix the error(s) before completing the import.
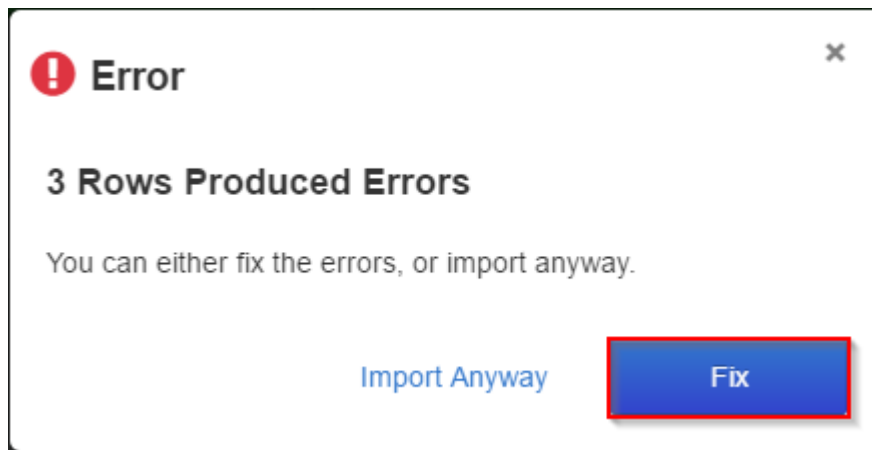
Click **Fix** to return to the Import Inventory screen. In this example, the Excel sheet column "Status" was mapped to the SalesPad Cloud information field "Item Status", but the values entered into the column didn't match available options for that field in SalesPad Cloud.
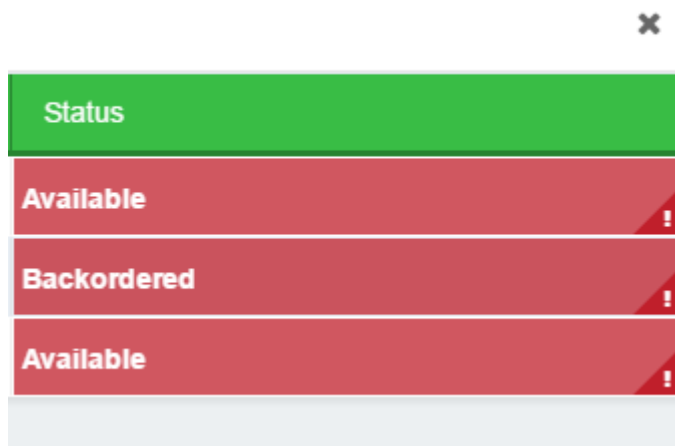
Mapping the "Status" column to "Notes" instead will resolve the issue.

If SalesPad Cloud runs the Quick Validation and no problems are found, you will see a success message. Click **Import** to complete the import process.
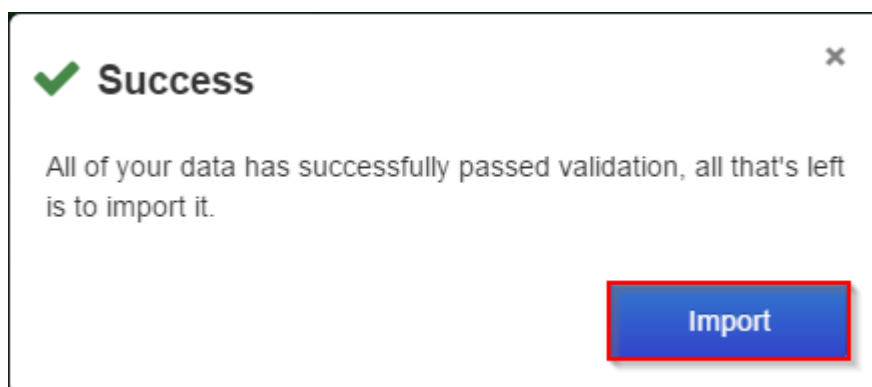

You will be sent back to the main module screen. Depending on how much data you are importing, this process might take a while. Once your data finishes importing, you will receive an email letting you know that the data has imported successfully. In the meantime, feel free to continue conducting your business in SalesPad Cloud, or to navigate away entirely. The data import will take place in the background.

Exporting Data

To export data from a SalesPad Cloud grid to a CSV file, first arrange your grid to display the data you want to

export, then click the **Export** button in the upper right-hand corner.
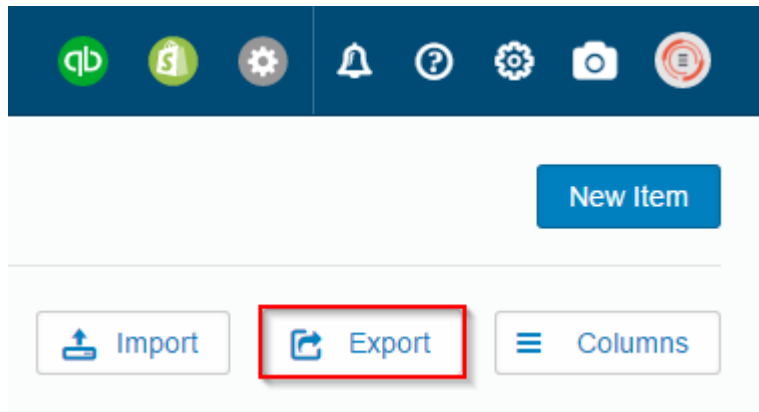
The CSV file will download to your computer's default download location. Navigate to that folder to find the file (it will be titled InventorySummaryView, SalesSummaryView, etc). This file can be edited and imported back into SalesPad Cloud; you do not need to use the provided Excel template to import data.

Arranging Grids

Every grid in SalesPad Cloud is customizable. Before you export any data, you'll want to make sure that your grid is set up the way you want it.

Click and drag on a column header to move it in your grid. You can also adjust the width of a column by hovering your mouse over the edge of the column header until it turns into an icon with two arrows, then dragging the column to the width you want it to be.
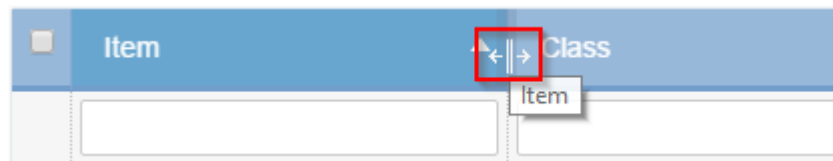
To select which columns you want visible in your grid, click the **Columns** button above the upper right-hand corner of your grid.
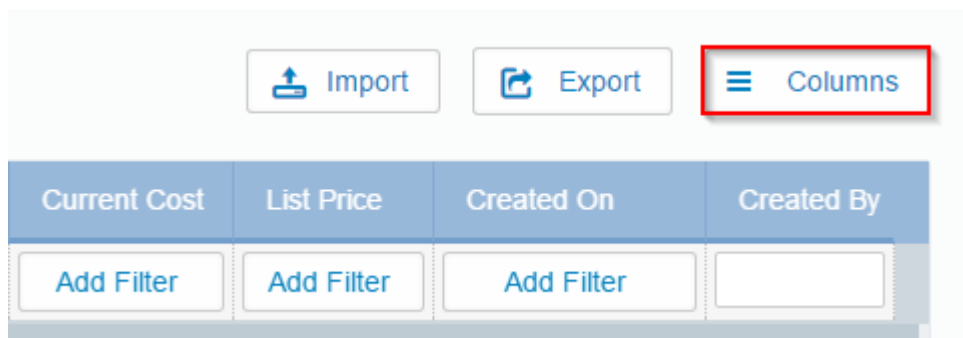
In the Edit Columns drawer that appears, check the boxes for those columns you want visible and uncheck the ones for those you'd rather not see.

Edit Columns ✕

☑ Fit column widths to grid

[Reset Layout]

[Clear Autofilters]

[Find a Column]

☑ Allocated

☑ Available

☐ Average Cost

☑ Backordered

☐ Changed By

Once you have your columns arranged how you want them, use the search bar or the auto filter row to display the data you're after. If you do not see the auto filter row, click the gray ellipses beneath the column headers.

Item	Class	Type	Onhand	Allocated	Available	Backordered	Current Cost
		---	Add Filter	Add Filter	Add Filter	Add Filter	Add Filter
Accrual - Large	Large Tee	Inventory	0 Ea	0 Ea	0 Ea	2 Ea	0.00
Accrual - Medium	Medium Tee	Inventory	33 Ea	6 Ea	27 Ea	0 Ea	5.63
Accrual - Small	Small Tee	Inventory	0 Ea	0 Ea	0 Ea	0 Ea	0.00

Depending on the column, the auto filter for that column might have additional filtering capabilities build in, or provide a dropdown option.

If you need to clear all search criteria from your auto filter row, or if you want to reset your grid layout, open the Edit Columns drawer and select the appropriate option.

Updating Data

Updating existing SalesPad Cloud data using a Microsoft Excel import is very similar to importing new data. To update existing SalesPad data, import a Microsoft Excel sheet containing the main column (e.g. Item Number or Customer), and the column(s) you wish to update. To avoid importing bad data, take extra care to make sure that your columns are mapping correctly. Do not include columns that you don't want to update, as this will just add extra time to the data import.