



[Knowledgebase](#) > [FAQ](#) > [Importing and Exporting Data from SalesPad Cloud](#)

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.

Item	Class	Type	Onhand
Bat Signal T-Shirt - Large	Large Tee	Inventory	52 Ea
Simple Greek T-Shirt - X Large	XL Tee	Inventory	7 Ea
Zoho - X Large	XL Tee	Inventory	1 Ea
Simple Greek T-Shirt - Small	Small Tee	Inventory	3 Ea
SalesPad Tote Bag	Accessories	Inventory	70 Ea
Vicinity Brew T-Shirt - Large	Large Tee	Inventory	25 Ea

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.



New Item

Import

Export

Columns

Click the **Download Excel Template** in the Import drawer that appears.

Feedback

Import Inventory

x

You can import from your own spreadsheets.

We support Excel .xls and .xlsx files

How to Import

Browse to the file that contains the you wish to import using the 'Browse' button below.

Choose File

Browse

Download Excel Template

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.

Import Inventory

Saved Definitions

Auto-Mapped



Clear Mapped Columns

Item Group

→ -

Item Number

→ -



Item Name
In Stock
Backordered
Location

Item Status

→ -

Item Type

→ -

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.

The preview pane shows a table with columns: Item Name, Price, Cost, and Status. The first row has Item Name as 'Frame', Price as 50, Cost as 40, and Status as 'Available'. The second row has Item Name as 'Glass', Price as 120, Cost as 100, and Status as 'Backordered'. The third row has Item Name as 'Print', Price as 80, Cost as 70, and Status as 'Available'. On the left, there are mapping dropdowns: 'Item Description' is mapped to 'Item Name', 'Item Group' is mapped to 'Item Name', and 'Item Number' is mapped to 'Item Name'. The 'Item Number' mapping is highlighted with a red box and a cursor icon.

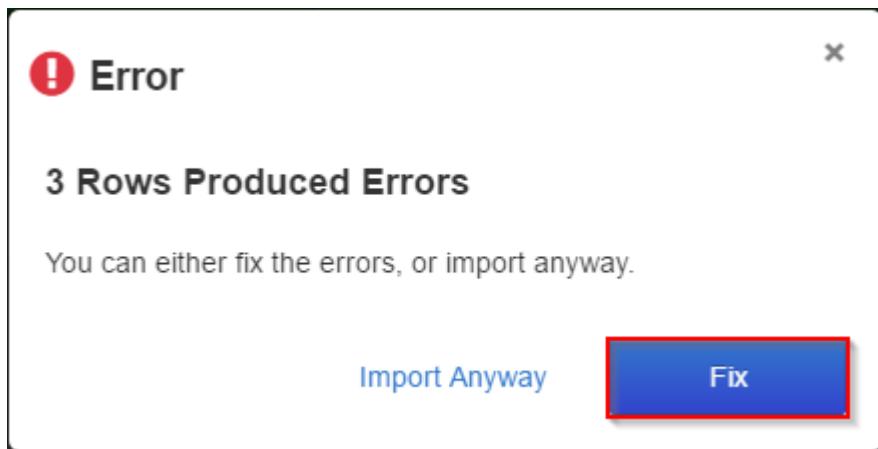
Repeat this process until you've assigned each of your Excel sheet columns to a SalesPad Cloud information field. If you want to import only some of the columns in your Excel sheet, uncheck the box next to the column name. You will see the column header in the preview pane turn back to blue.

The preview pane shows the same table as before. The 'Item Number' mapping is now checked (blue box) and mapped to 'Item Name'. The 'Item Status' mapping is unchecked (red box) and mapped to 'Status'. The 'Item Description' and 'Item Group' mappings remain the same as in the previous step.

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.

The bottom bar of the import window has two buttons: 'Quick Validation Before Uploading' (checked) and 'Import' (highlighted with a red box).

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.

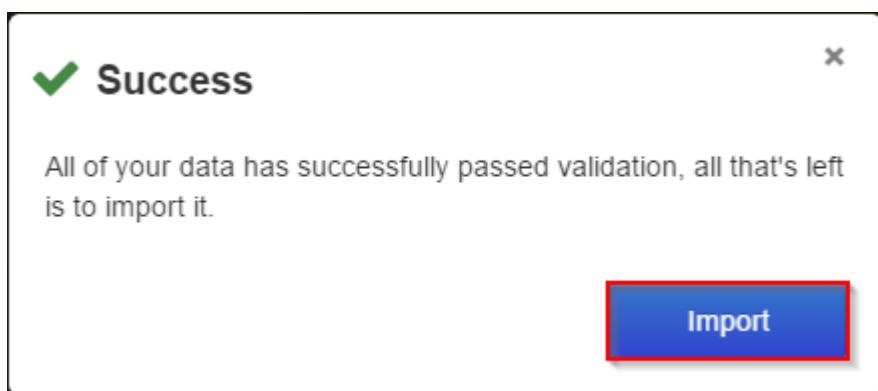


Click **Fix** to return to the Import Inventory screen. In this example, the Excel sheet column "Status" was mapped to the SalesPad Cloud information field "Item Status", but the values entered into the column didn't match available options for that field in SalesPad Cloud.

Status
Available
Backordered
Available

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.

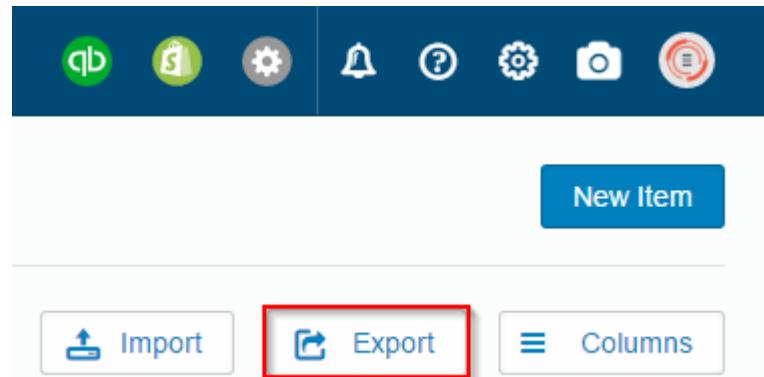


You will be sent back to the main module screen. Depending on how much data you are importing, this process might take a while. Once your data finishes importing, you will receive an email letting you know that the data has imported successfully. In the meantime, feel free to continue conducting your 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.

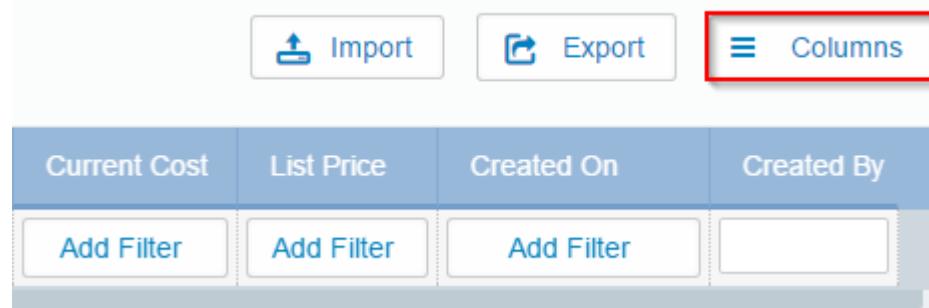
Arranging Grids

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.

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Edit Columns

x

Fit column widths to grid

[Reset Layout](#)

[Clear Autofilters](#)

Find a Column

Allocated

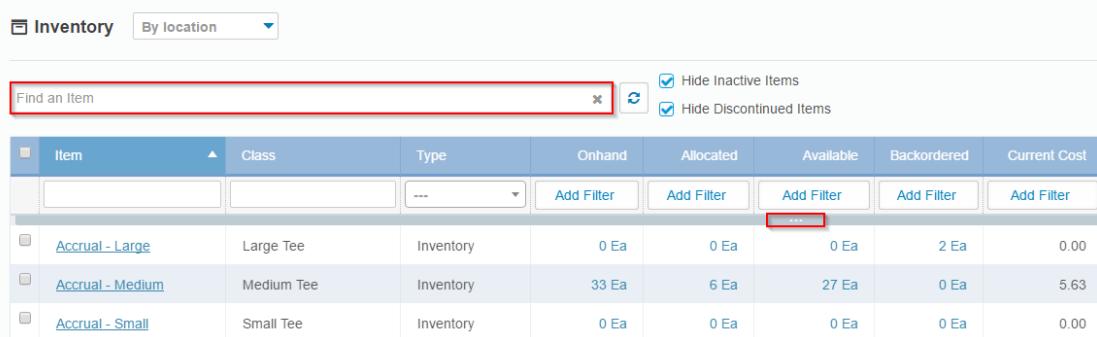
Available

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.



The screenshot shows a grid interface for managing inventory items. At the top, there is a header bar with a 'Inventory' button and a 'By location' dropdown. Below the header is a search bar labeled 'Find an Item' with a red box around it. To the right of the search bar are two checkboxes: 'Hide Inactive Items' and 'Hide Discontinued Items', both of which are checked. The main area is a table with the following columns: Item, Class, Type, Onhand, Allocated, Available, Backordered, and Current Cost. The 'Type' column has a dropdown arrow icon. Below the table, there are three data rows:

Item	Class	Type	Onhand	Allocated	Available	Backordered	Current Cost
		---	<input type="button" value="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 built 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.

eedback

Edit Columns

x

Fit column widths to grid

[Reset Layout](#)

[Clear Autofilters](#)

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.