Purchase Line Excel Import

Cavallo Support - 2024-11-22 - Purchasing

Overview

The SalesPad Purchase Line Excel Import tool allows users to load large amounts of purchase line items quickly onto an existing order.

Note: The import will only work for Excel versions 2003, 2007, and 2010.

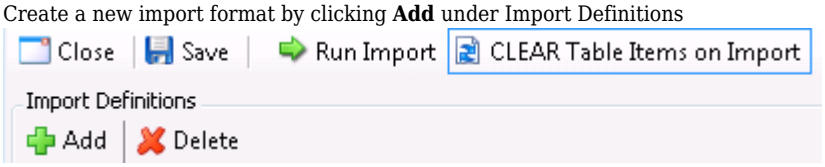
Security

To use the Purchase Line Excel Import tool, *Purchase Line Excel Import* must be enabled in Modules > Security Editor.

Creating an Import Definition

First you will create an import definition in the Import Manager module.

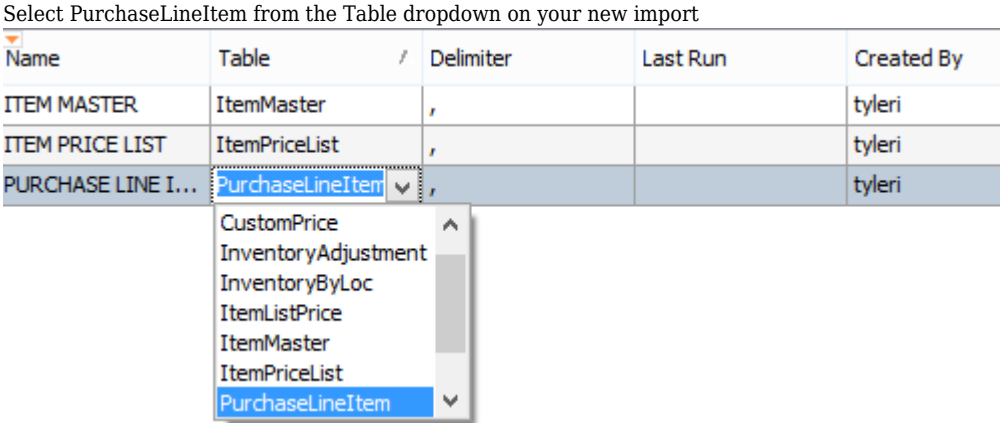
1. Go to Modules > Import Manager (located under System)
2. Create a new import format by clicking **Add** under Import Definitions



3. Enter an appropriate name for the import and click **OK**



4. Select PurchaseLineItem from the Table dropdown on your new import



Note: The Line_Seq field must be specified within the Excel document, starting with 16384, and adding 16384 for each subsequent line item.

Creating the Mapping

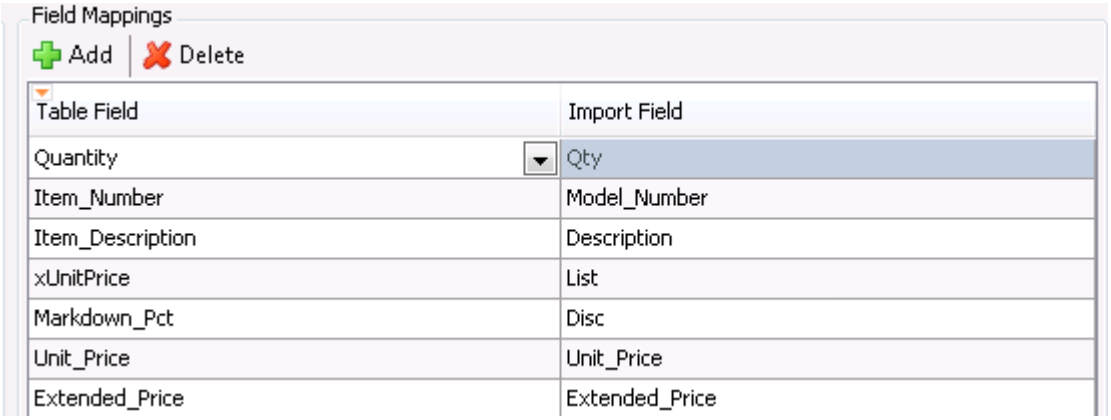
Next, you need to create the mapping from the PurchaseLineItem business object to the Excel document. The Excel document must be formatted so that the first line contains the column headers, with data on subsequent lines. The column headers must use database-safe names (i.e. no spaces, special characters, or reserved words).

	Qty	Model_Number	Description	List	Disc	Unit_Price	Extended_Price
2	1	CX4-240C	CX4-240C SPE WITH REDUNDANT SPS	19920.00	40.00	11952.00	11952.00
3	1	CX4-RACK-40U	CX4 40U RACK	4200.00	40.00	2520.00	2520.00

Note: You must rename the page tab default name of Sheet1 in the Excel document to Import. Failing to do so will result in a Failed to start error message.

To create the mapping:

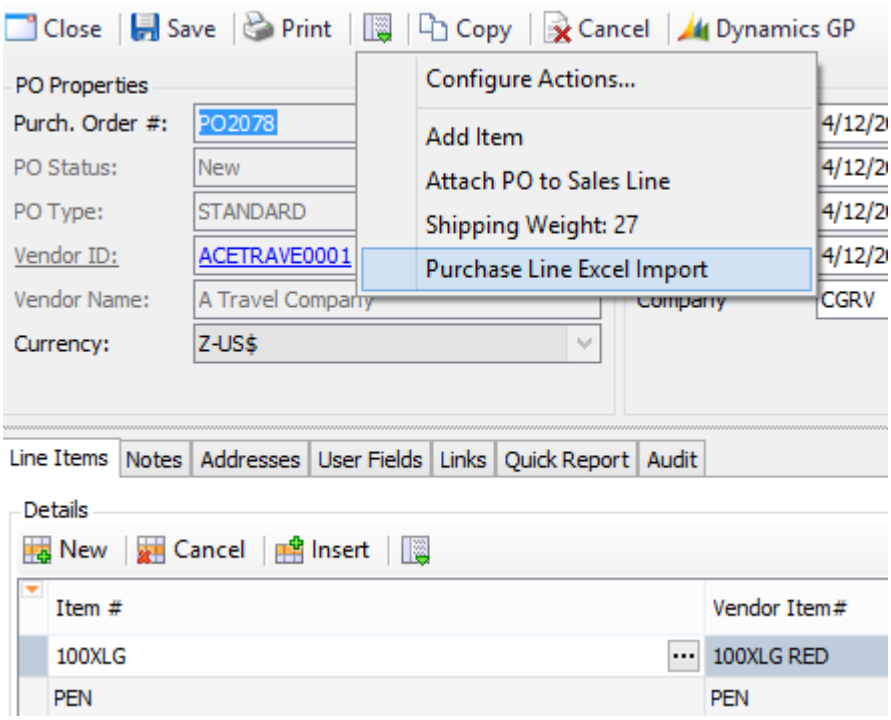
1. Click **Add** under Field Mappings
2. Click the dropdown under the Table Field column to see the list of available columns for the PurchaseLineItem business object
3. Click the column labeled Import Field and type in the name of the corresponding column in the Excel document. See the sample map below:



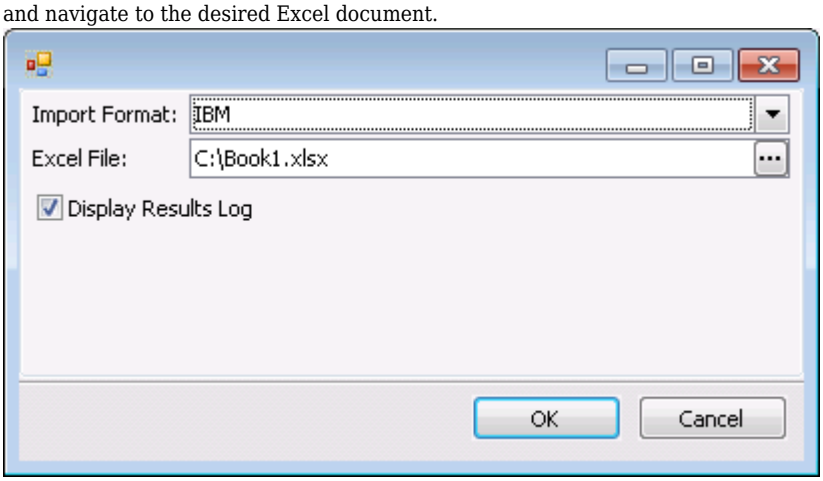
Importing

Now that you have defined an import map, you can load the lines into an existing document:

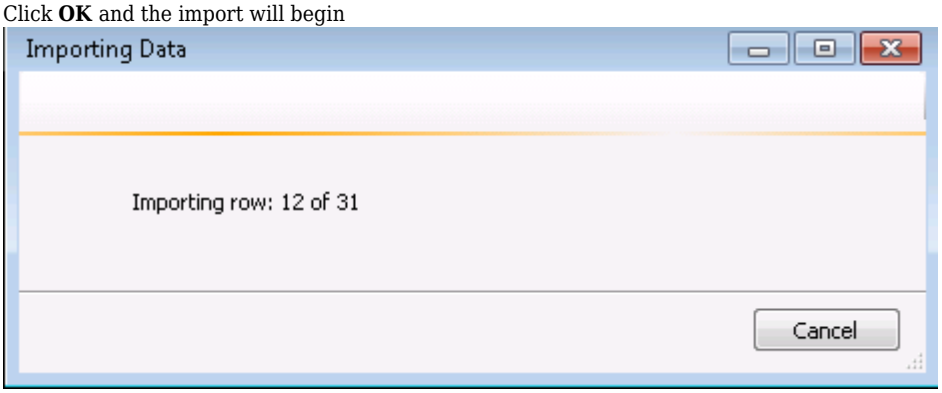
1. Open the desired document
2. Select Purchase Line Excel Import from the **Actions** dropdown menu ( ) on the line items tab:



3. This will bring up the import dialog. From the Import Format dropdown, select the import you created, and navigate to the desired Excel document.



4. Click **OK** and the import will begin



5. When the import is finished, click **Close** to return to the document.

Note: Any items found during import that were not found in the item master will be marked as non-inventory.