



Purchase Line Excel Import

Megan De Freitas - 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.

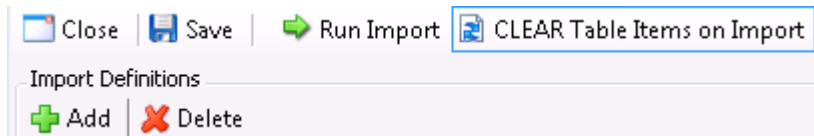
Security

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

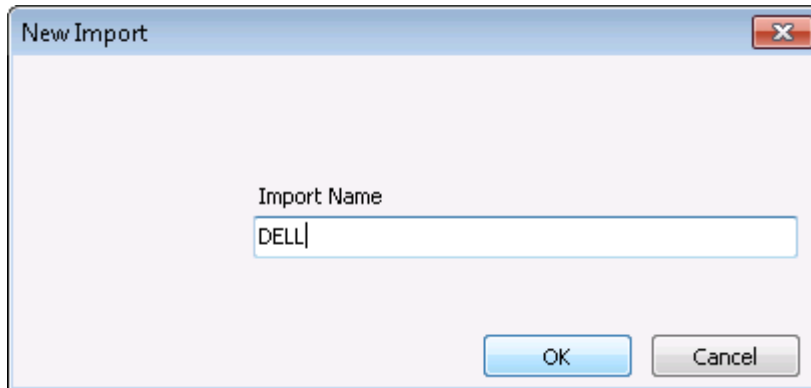
Creating an Import Definition

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

Name	Table	Delimiter	Last Run	Created By
ITEM MASTER	ItemMaster	,		tyleri
ITEM PRICE LIST	ItemPriceList	,		tyleri
PURCHASE LINE I...	PurchaseLineItem	,		tyleri

CustomPrice
InventoryAdjustment
InventoryByLoc
ItemListPrice
ItemMaster
ItemPriceList
PurchaseLineItem

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).

1	Qty	Model_Nu mber	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:

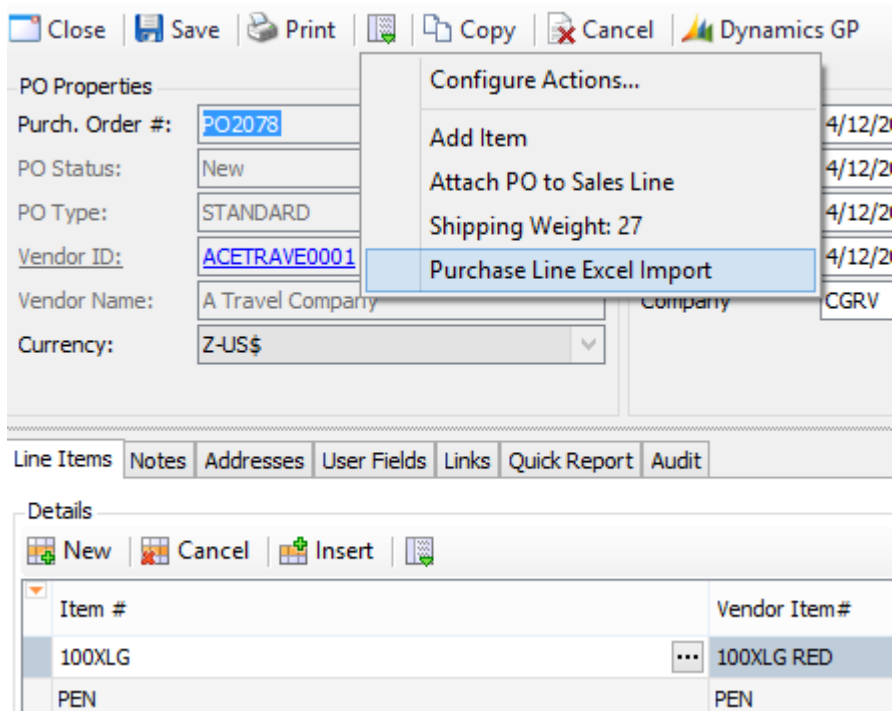
1. Click **Add** under Field Mappings
2. Click the dropdown under the Table Field column to see the list of available columns for the PurchaseLineItem business object
3. Click the column labeled Import Field and type in the name of the corresponding column in the Excel document. See the sample map below:

Field Mappings	
<div> Add Delete </div>	
Table Field	Import Field
Quantity	Qty
Item_Number	Model_Number
Item_Description	Description
xUnitPrice	List
Markdown_Pct	Disc
Unit_Price	Unit_Price
Extended_Price	Extended_Price

Importing

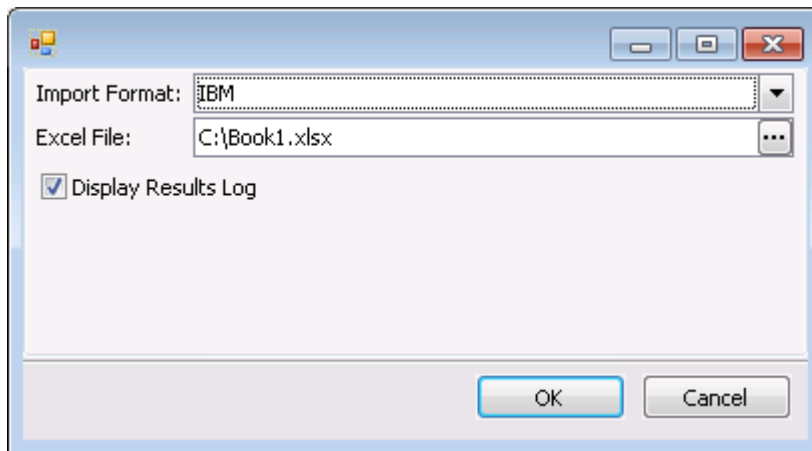
Now that you have defined an import map, you can load the lines into an existing document:

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



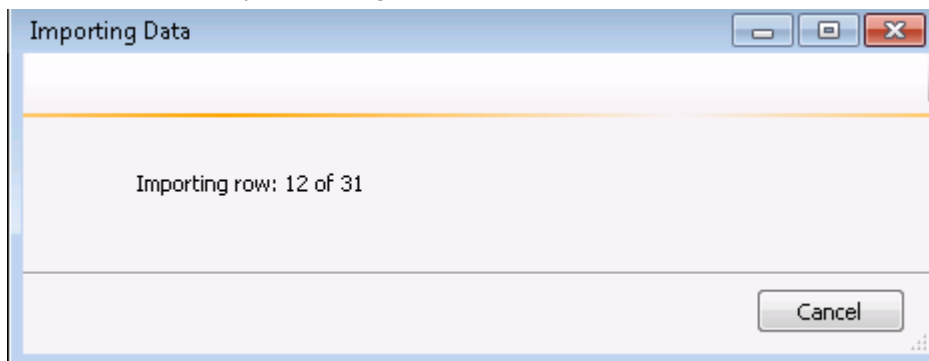
The screenshot shows the Dynamics GP interface. At the top, there is a toolbar with buttons for Close, Save, Print, Copy, Cancel, and Dynamics GP. Below the toolbar is the 'PO Properties' section with fields for Purch. Order # (PO2078), PO Status (New), PO Type (STANDARD), Vendor ID (ACETRAVE0001), Vendor Name (A Travel Company), and Currency (Z-US\$). A dropdown menu is open, showing options: Configure Actions..., Add Item, Attach PO to Sales Line, Shipping Weight: 27, and Purchase Line Excel Import (highlighted). Below the dropdown is a table with columns 'Item #' and 'Vendor Item#'. The table contains two rows: '100XLG' and 'PEN' under 'Item #', and '100XLG RED' and 'PEN' under 'Vendor Item#'. The 'Details' section is visible at the bottom.

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.



The screenshot shows the 'Import Format' dialog box. It has a title bar with a close button. Inside, there is a dropdown menu for 'Import Format' set to 'IBM'. Below it is a text field for 'Excel File' with the path 'C:\Book1.xlsx' and a browse button (...). There is a checkbox labeled 'Display Results Log' which is checked. At the bottom, there are 'OK' and 'Cancel' buttons.

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



The screenshot shows the 'Importing Data' dialog box. It has a title bar with a close button. Inside, there is a progress bar and a text field showing 'Importing row: 12 of 31'. At the bottom right, there is a 'Cancel' button.

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.