Sales Line Excel Import

Cavallo Support - 2024-12-03 - Sales

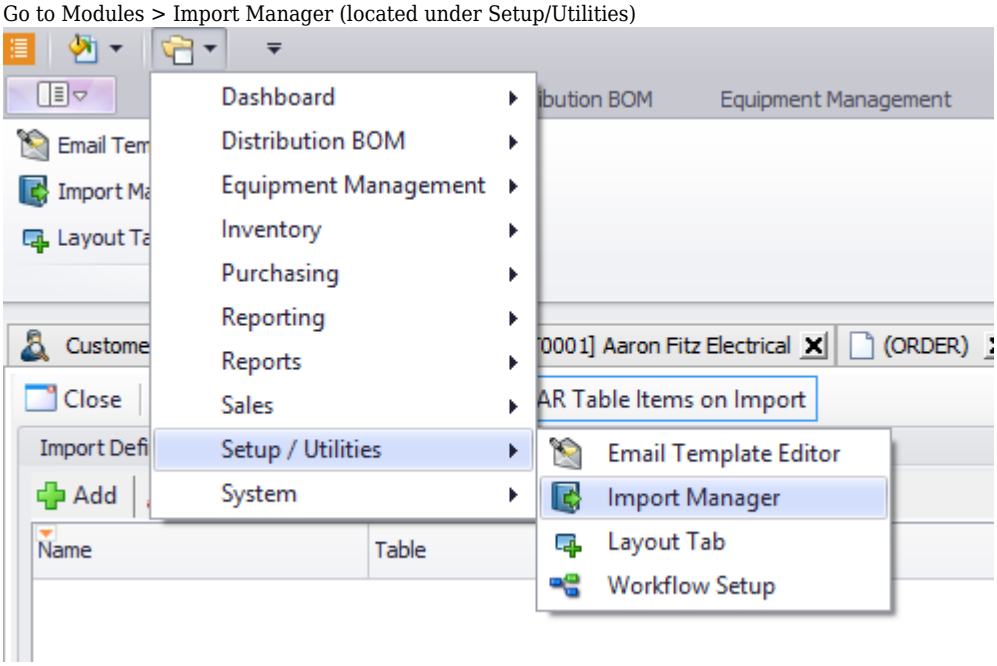
Overview

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

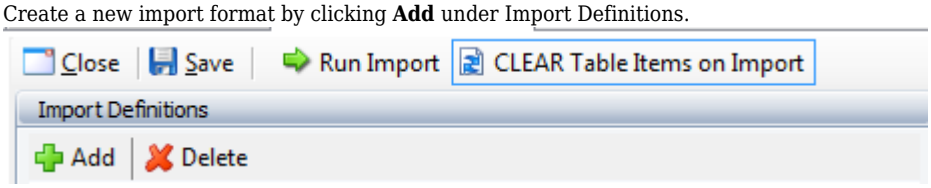
Creating an Import Definition

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

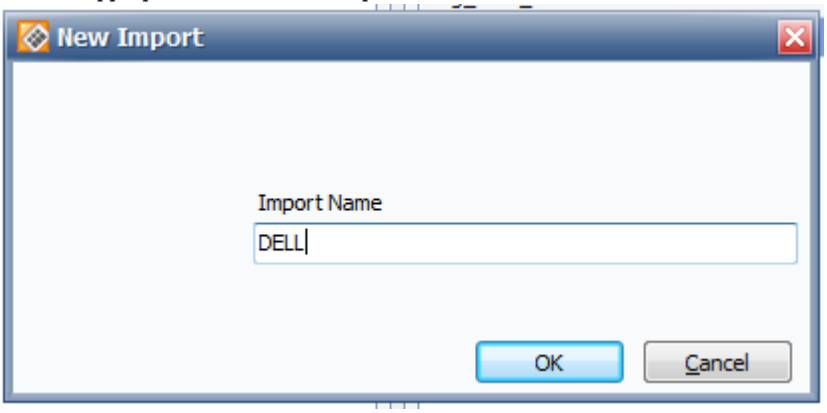
1. Go to Modules > Import Manager (located under Setup/Utilities)



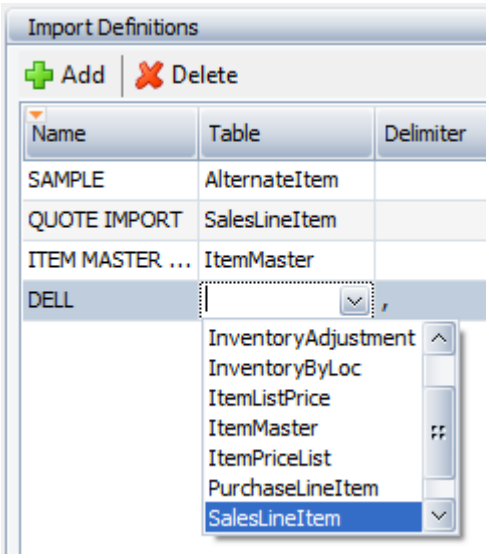
2. Create a new import format by clicking **Add** under Import Definitions.



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



4. Select SalesLineItem from the **Table** dropdown on your new import.



Creating the Mapping

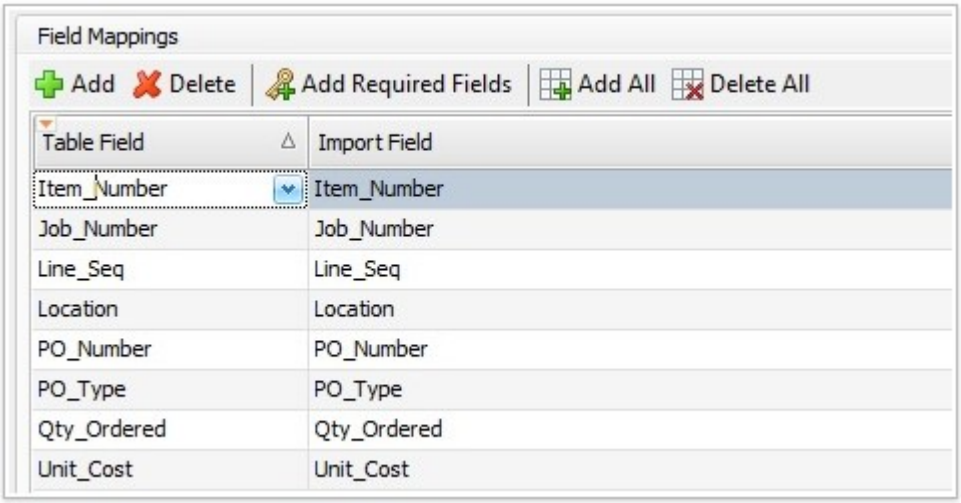
Next, you will create the mapping from the SalesLineItem business object to the Excel Document. The Excel document must be formatted so that the first line contains the column headers, with data on subsequent lines. The column headers must use database-safe names (i.e. no spaces, special characters or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

	A	B	C	D	E	F	G
1	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. Open the dropdown under the Table Field column to see the list of available columns for the SalesLineItem 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:

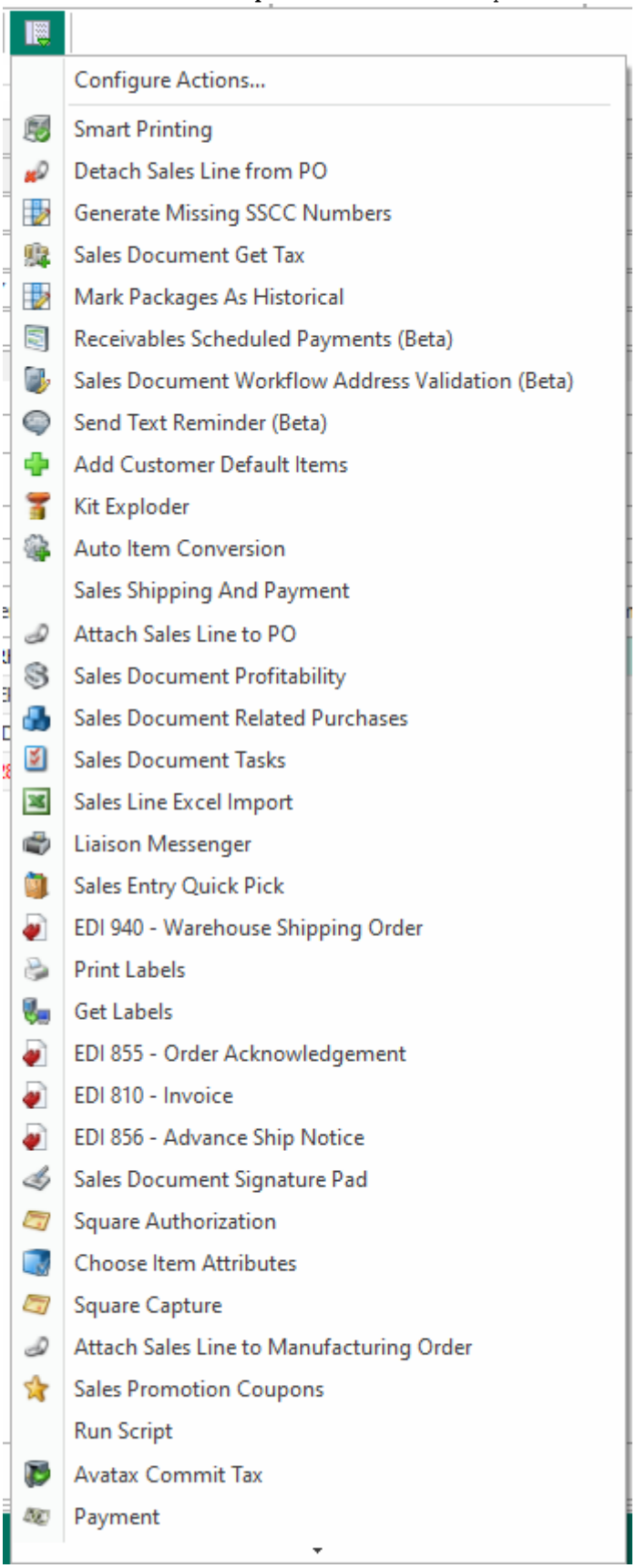


Importing

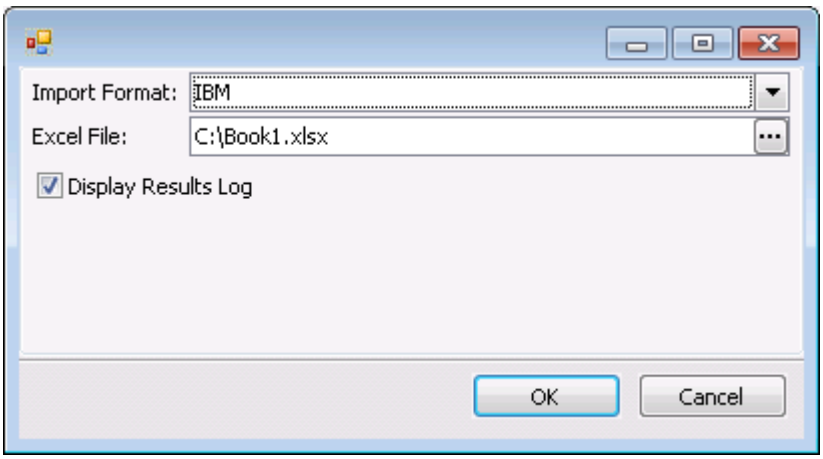
Now that you have defined an import map, you can load the lines into an *existing* document:

1. Open the desired document.

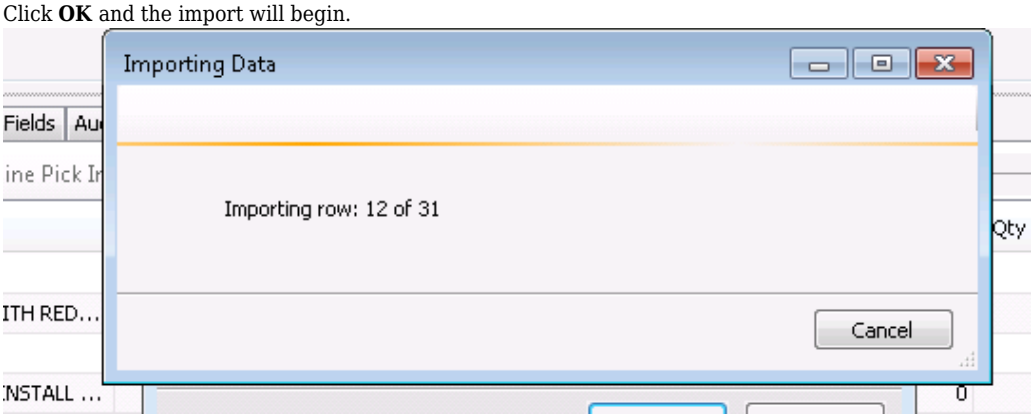
2. Select **Sales Line Excel Import** from the **Actions** dropdown menu on the Document Header:



3. This will bring up the import dialog box. 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.

Note: The sales line Excel import process can only be performed on an existing document.

Security

Sales Line Excel Import - Allows the security group to access the Sales Line Excel Import action on the sales document.