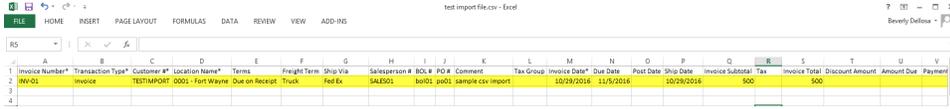


# How to Import Sales Transactions from CSV

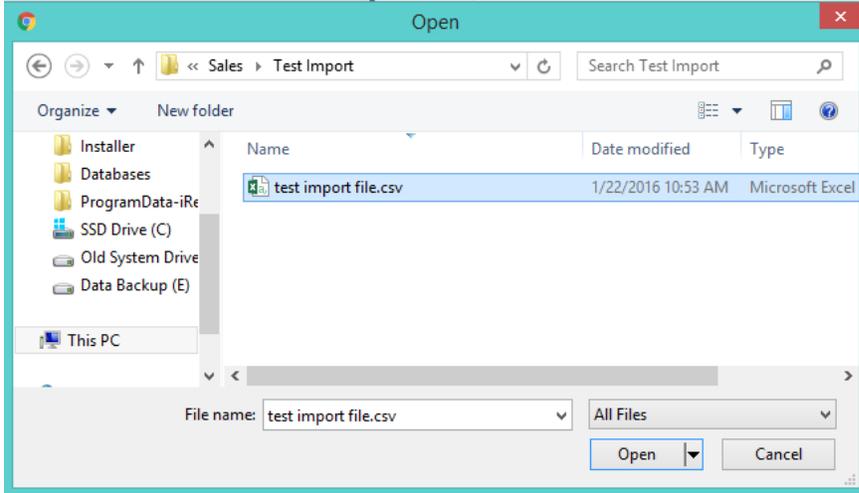
Here are the steps in importing transactions from csv file.

1. Before you proceed with the succeeding steps, make sure that you have the csv file to be imported. You can get the latest template by clicking the **Import Transactions from CSV | Template button**. Here is a sample record.

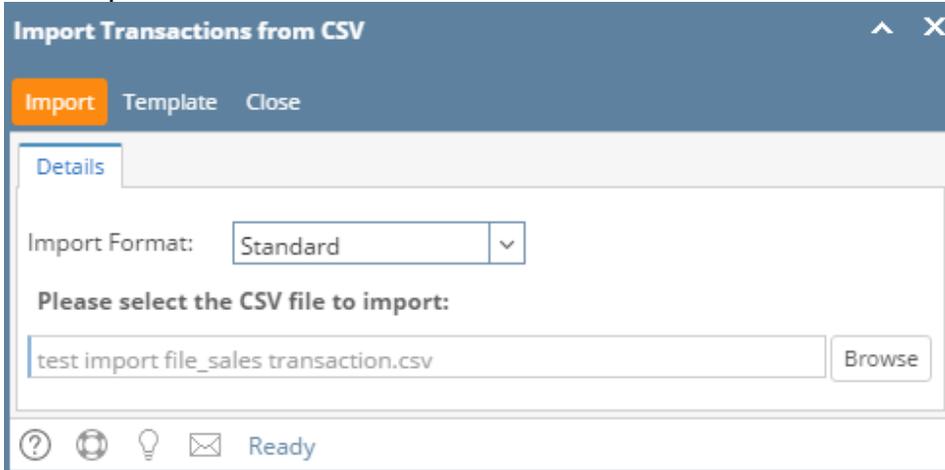


Invoice Number*	Transaction Type*	Customer #*	Location Name*	Terms	Freight Term	Ship Via	Salesperson #	BDL #	PO #	Comment	Tax Group	Invoice Date*	Due Date	Post Date	Ship Date	Invoice Subtotal	Tax	Invoice Total	Discount Amount	Amount Due	Payment
INV-01	Invoice	TESTIMPORT	0001 - Fort Wayne	Due on Receipt	Truck	Fed Ex	SALES01	bol01	po01	sample csv import		10/29/2016	11/5/2016			10/29/2016	500		500		

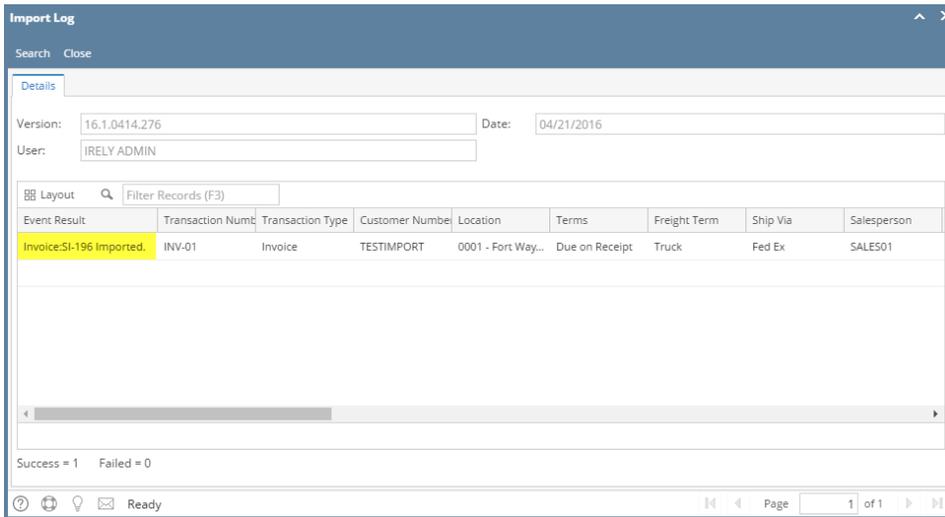
2. Click the **Sales | Import Transactions from CSV** menu to open the respective screen.
3. Select the **Import Format**. Choices are Standard and CarQuest. In this sample, we will use the Standard format.
4. Click the **Browse button** and select the csv file for import.



5. Click the **Import button**.



The process will take a while depending on the number of records for import. Once the process is done, the **Import Log screen** will be displayed to give you the result for each record.



There are a number of reasons to fail the importing of records. Some of these are:

- Required details, like Invoice Number, Transaction Type, Customer Number, Location Name, and Invoice Date, are blank.
- The details provided, like Customer Number, Location Name, Terms, Freight Term, Ship Via, Salesperson Number, and Tax Group, does not exist.
- Invoice Number was already imported.

 If you wish to review the Import Log at a later time, you can open it from **Sales | Import Logs menu**.

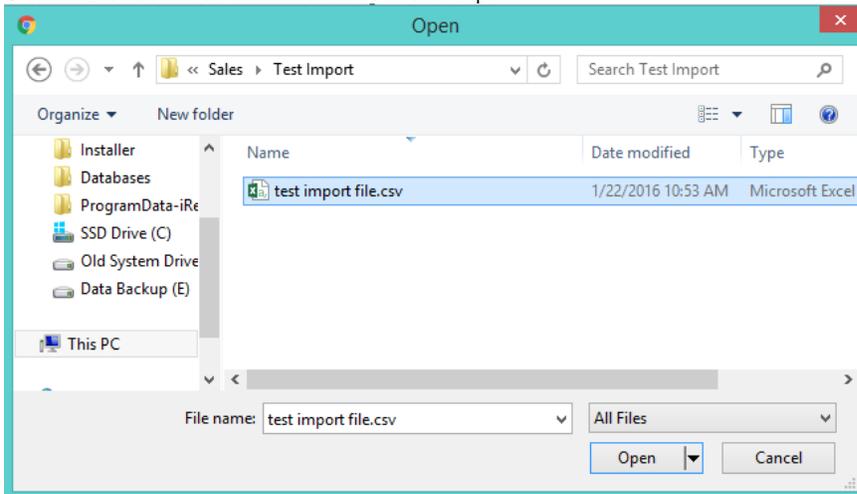
- Once importing is successful, open the imported transaction and verify the details.

Here are the steps in importing transactions from csv file.

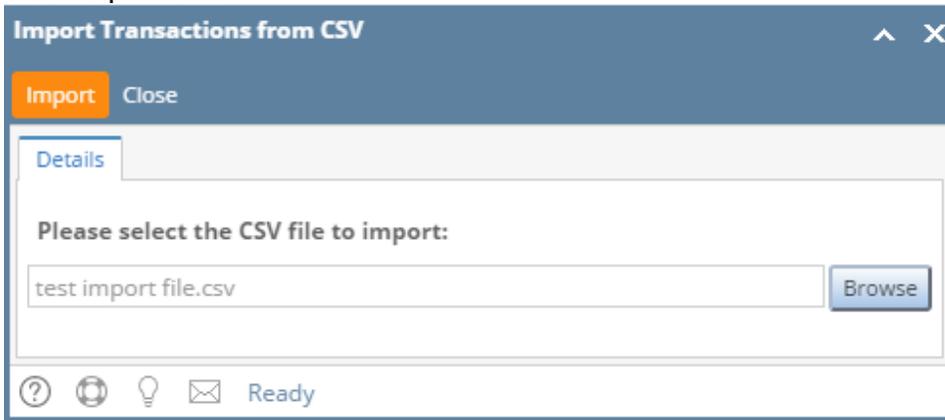
- Before you proceed with the succeeding steps, make sure that you have the csv file to be imported. Here is a sample record.

Invoice Number*	Transaction Type*	Customer #*	Location Name*	Terms	Freight Term	Ship Via	Salesperson #	BOL#	PO #	Comment	Tax Group	Invoice Date*	Due Date	Post Date	Ship Date	Invoice Subtotal	Tax	Invoice Total	Discount Amount	Amount Due	Payment
INV001	Invoice	TESTIMPORT	0001 - Fort Wayne	Due on Receipt	Truck	Fed Ex	SALES01	00001	00001	sample csv import		1/22/2016	1/15/2016		1/22/2016	500		500			

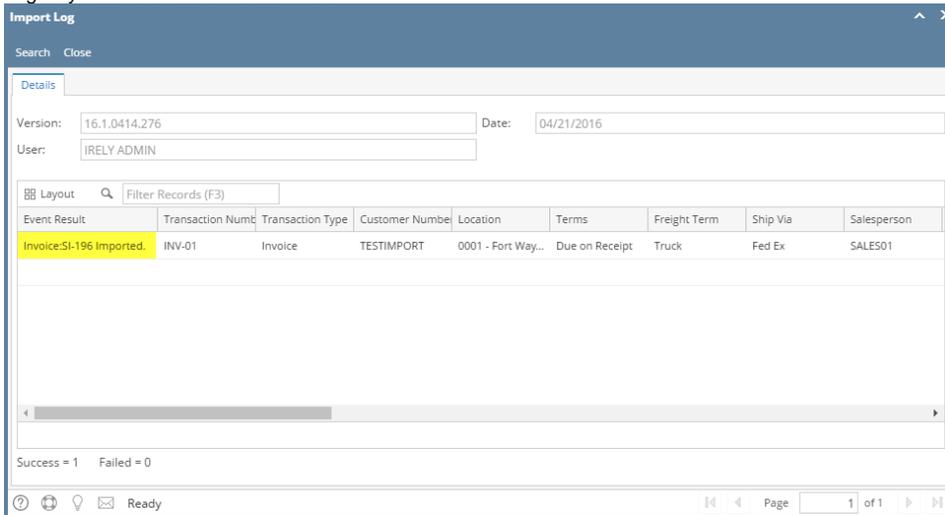
- Click the **Sales | Import Transactions from CSV** menu to open the respective screen.
- Click the **Browse** button and select the csv file for import.



4. Click the **Import** button.



The process will take a while depending on the number of records for import. Once the process is done, the **Import Log** screen will be displayed to give you the result for each record.



There are a number of reasons to fail the importing of records. Some of these are:

- a. Required details, like Invoice Number, Transaction Type, Customer Number, Location Name, and Invoice Date, are blank.
- b. The details provided, like Customer Number, Location Name, Terms, Freight Term, Ship Via, Salesperson Number, and Tax Group, does not exist.
- c. Invoice Number was already imported.



If you wish to review the Import Log at a later time, you can open it from **Sales | Import Logs** menu.

- Once importing is successful, open the imported transaction and verify the details. Here is the imported Invoice based on above csv file.

Invoice - TESTIMPORT

New Save Search Delete Undo Print Add Shipment Email Duplicate Post Recap Recurring Close

Details Instructions Payments (0) Attachments (0) Audit Log (1) Comments (0)

Type: Standard Recurring:  Bill To: TESTIMPORT Freight Term: Truck Invoice No: SI-196 Split:

Customer: TESTIMPORT Ship To: TESTIMPORT Deliver/Pickup: PO Number: po01 BOL Number: bol01

Invoice Date: 10/29/2016 Post: 10/29/2016 Ship Via: Fed Ex Due Date: 10/29/2016 Salesperson: SALE501 Currency: USD

Location: 0001 - Fort Wayne Terms: Due on Receipt Accrual: 1 Ship Date: 10/29/2016 Comments: INV-01

+ Insert Open Remove Add Recipe Get Previous Details Layout Filter Records (F3)

Item No	Contract No	Contract Seq	Description	Ordered	Order UOM	Shipped	UOM	Discount	Tax	Sub Currency	Price	Total	Weight UOM	Tax Group
#			sample csv...	1.00		1.00		0.00%	0.00		500.0000...	500.00		
#				0.00		0.00		0.00%	0.00		0.000000	0.00		

Bill To: TESTIMPORT Item: On Hand: On Order (PO): Subtotal: 500.00

Ship To: TESTIMPORT Committed: Back Order: Shipping: 0.00

Tax: 0.00

Total: 500.00

Edited Page 1 of 1