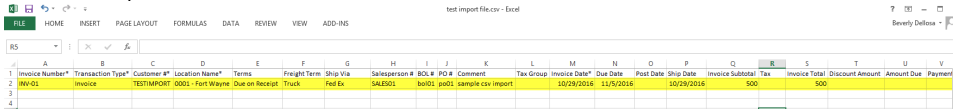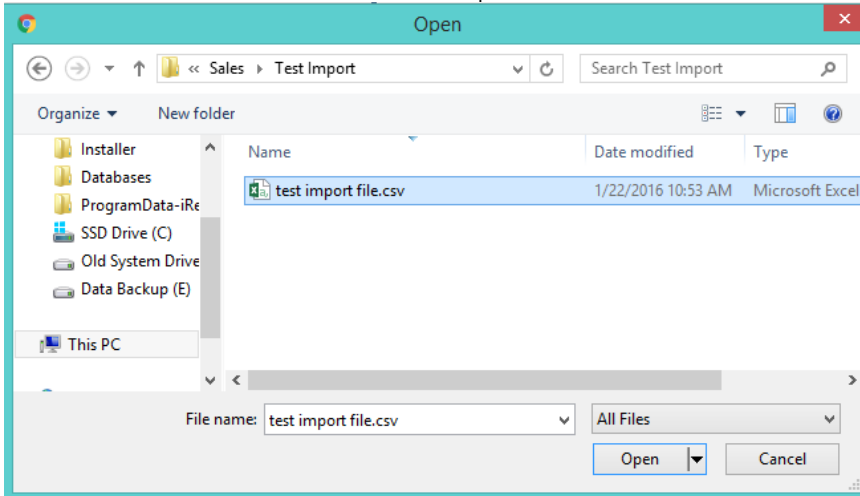# How to Import Sales Transactions from CSV

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**.
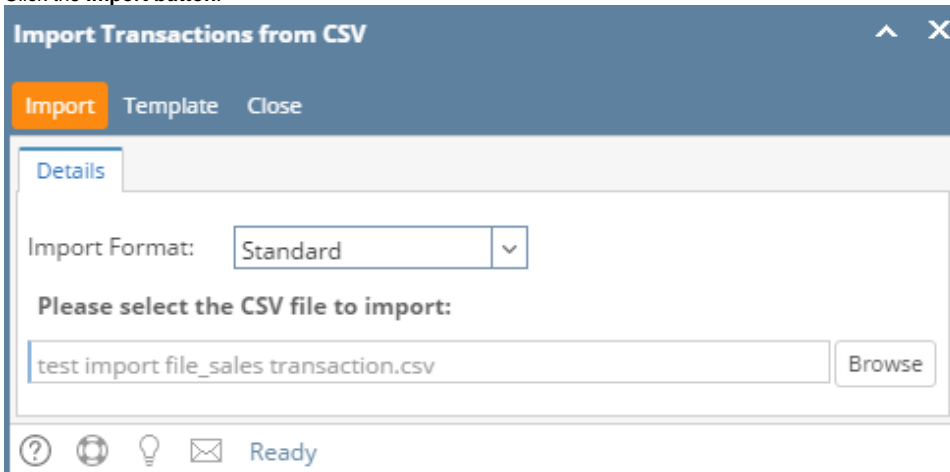   Here is a sample record.

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.
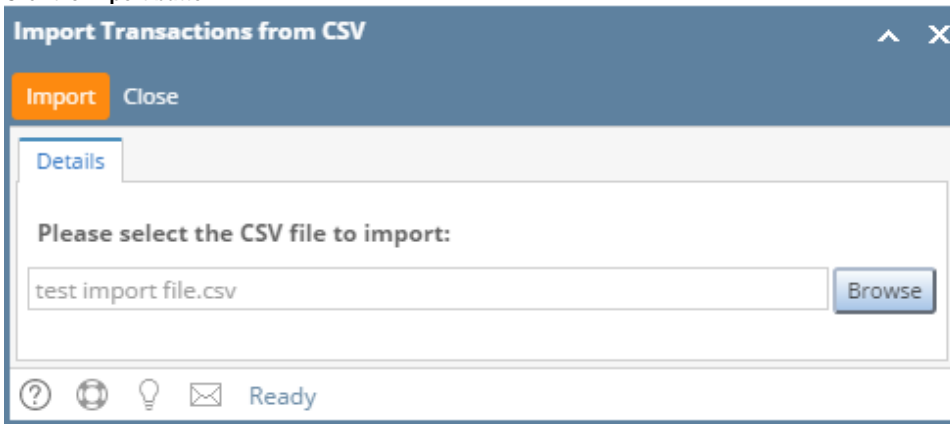4. Click the **Browse button** and select the csv file for import.

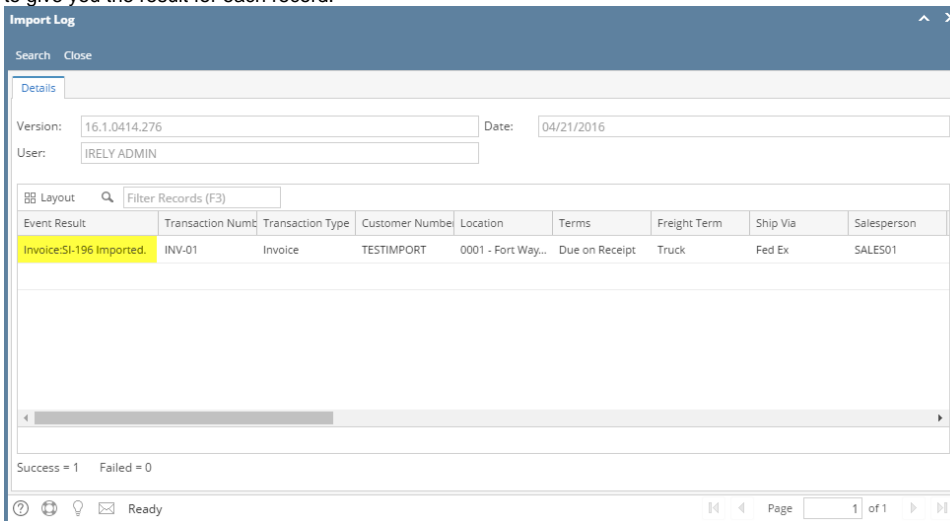5. Click the **Import button**.

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:
   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 exists.
   c. Invoice Number was already imported.

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

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

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. Here is a sample record.

2. Click the **Sales | Import Transactions from CSV menu** to open the respective screen.
3. 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 exists.
   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**.

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