Import Export Menu

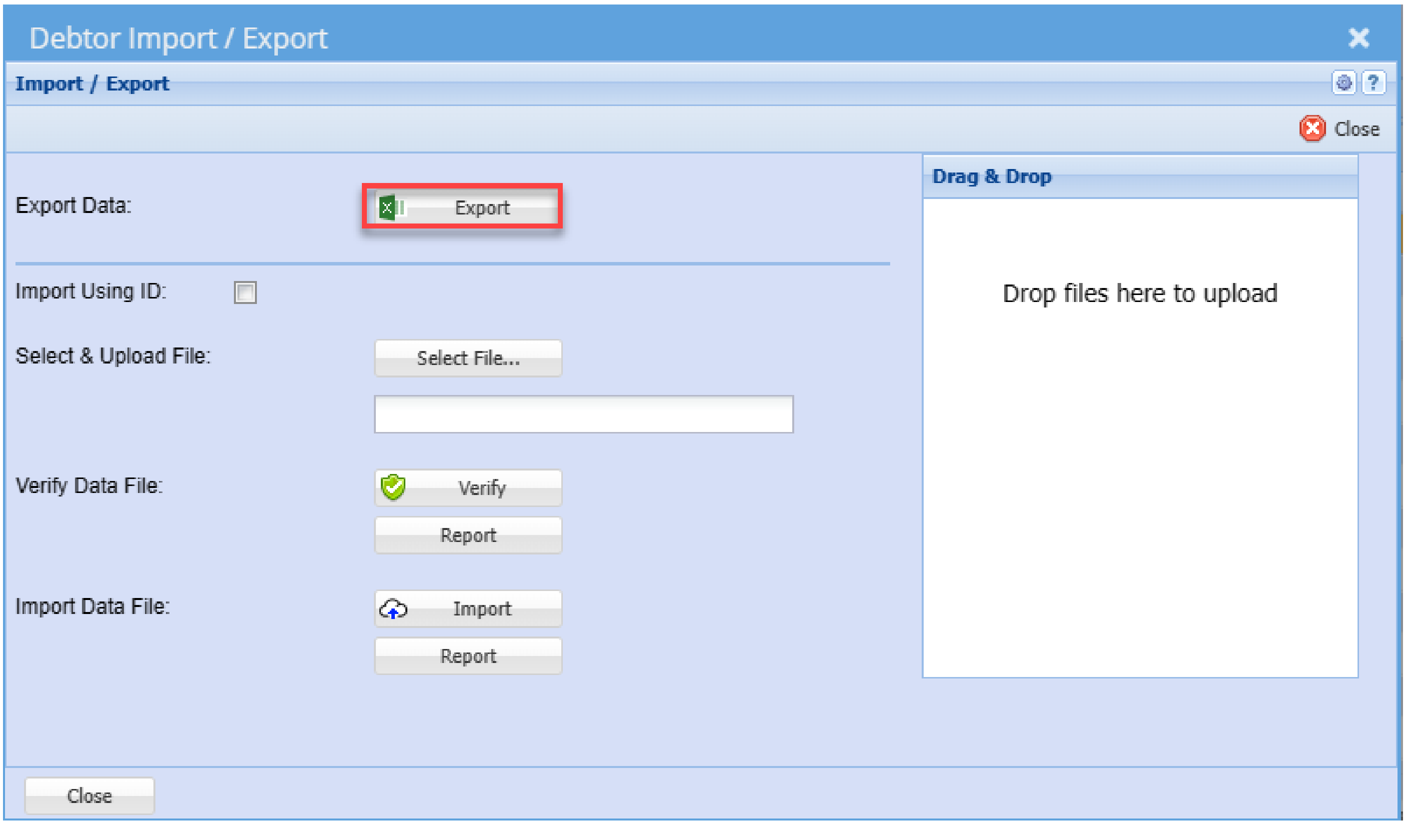
Imports

- Import Export Function
- Document Grid Import and Export Standards
- Excel Imports and Exports

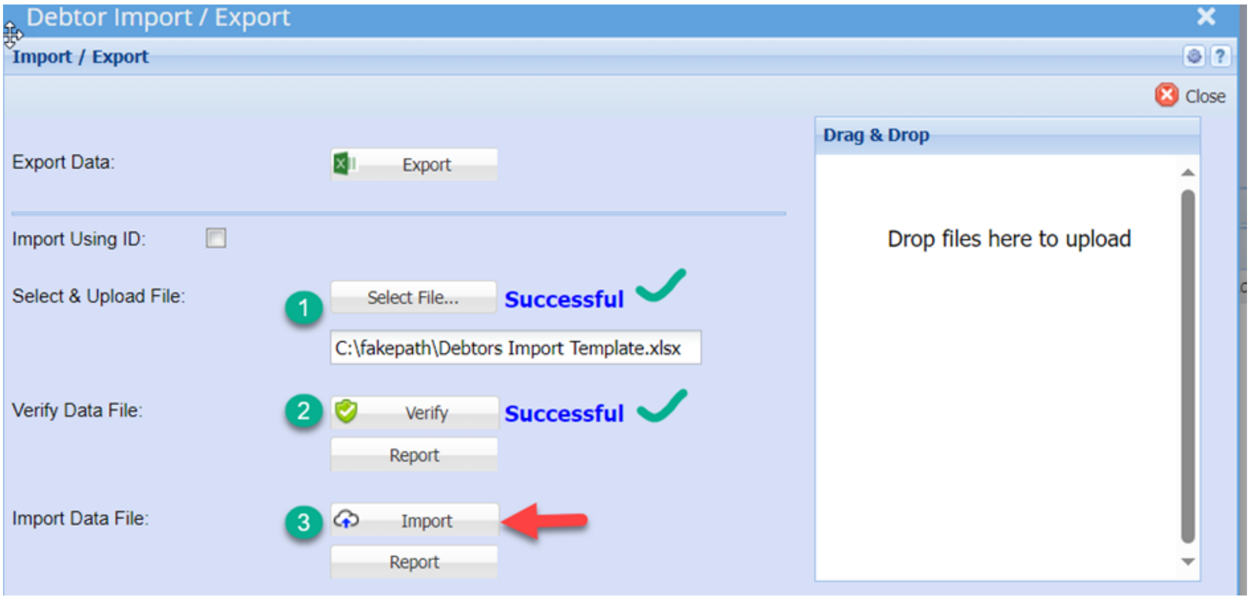
Import Export Function

Import Export Function can be found across the system.

Import Export button facilitates the transfer of data between Huge ERP and external files or data from other system.



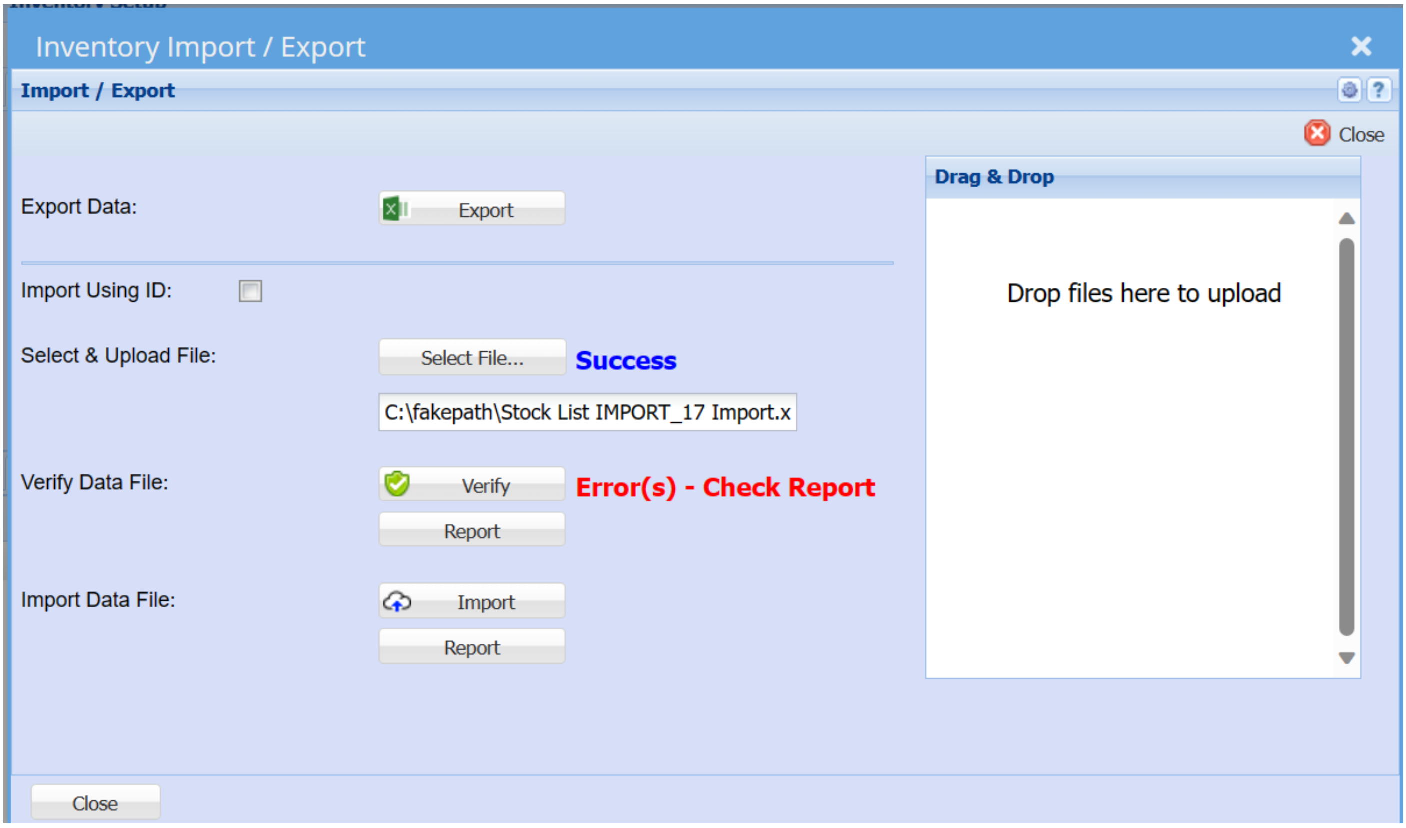
Export	You can click the Export button which will return the existing data listing into the required template for import
Import Using ID	Using this option allows one to export with the internal ID. This means one can change the code of the item Once you click Import ID. You will receive a warning. The import using ID refers to including the system ID which should not be changed at any given time.
Select & Upload File	Click the **Select File** Button to open your file explorer: search and select the import file you saved in the above step.
Verify	Click the Verify button to check for any errors on the import file
Import	Allows you to be able to import debtors/ Customers to the system



1.	Once you have the worksheet populated with the respective new information details, save the file as a normal Excel file.
2.	You should get a successful result returned. If not, correct the file, resave the file and retry the Verify
3.	If there are any errors when you click verify then you can click on report to see what is causing issues
4.	Once Verify is successful, click the Import Button
5.	Then click the report button below import to check if all the information were loaded accordingly
6.	When all results are successful and you are happy with the report
7.	Your New data will be loaded into the system and you can search for it in the normal manner.

Verify Errors

When Verifying the data and an error comes up, check the Report of the Verify



Open up the report and handle any issues in the Excel file

Line No corresponds with the Excel row line

When in Excel use Crtl + G to enter the Line number with A9952

Print | Email | Copy | Close

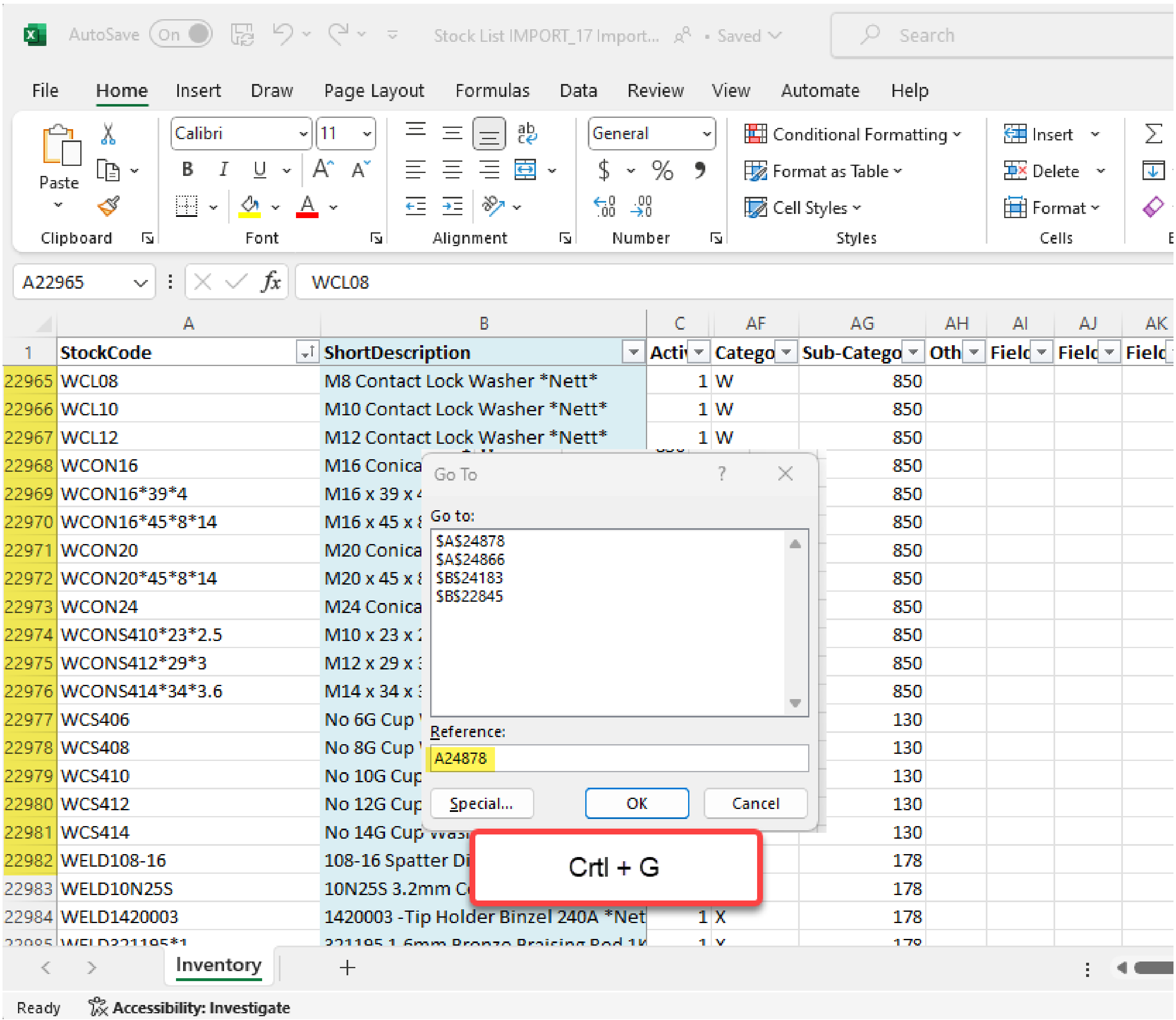
Inventory Import Report

File Name: Stock List IMPORT_17 Import.xlsx **Report Date:** 2024-01-26 14:12:31

Line No	Error Code	Error Description
9952		Default Supplier not found: 101376
9955		Default Supplier not found: 101376
9956		Default Supplier not found: 101376
9957		Default Supplier not found: 101376
19651		Default Supplier not found: 103705
19652		Default Supplier not found: 103705
22965		Make not found: 850
22966		Make not found: 850
22967		Make not found: 850
22968		Make not found: 850
22969		Make not found: 850
22970		Make not found: 850
22971		Make not found: 850
22972		Make not found: 850
22973		Make not found: 850
22974		Make not found: 850
22975		Make not found: 850
22976		Make not found: 850
23933		Make not found: 71
24852		Default Supplier not found: 101376
24853		Default Supplier not found: 101376

The above errors need to be corrected to successfully import this file.

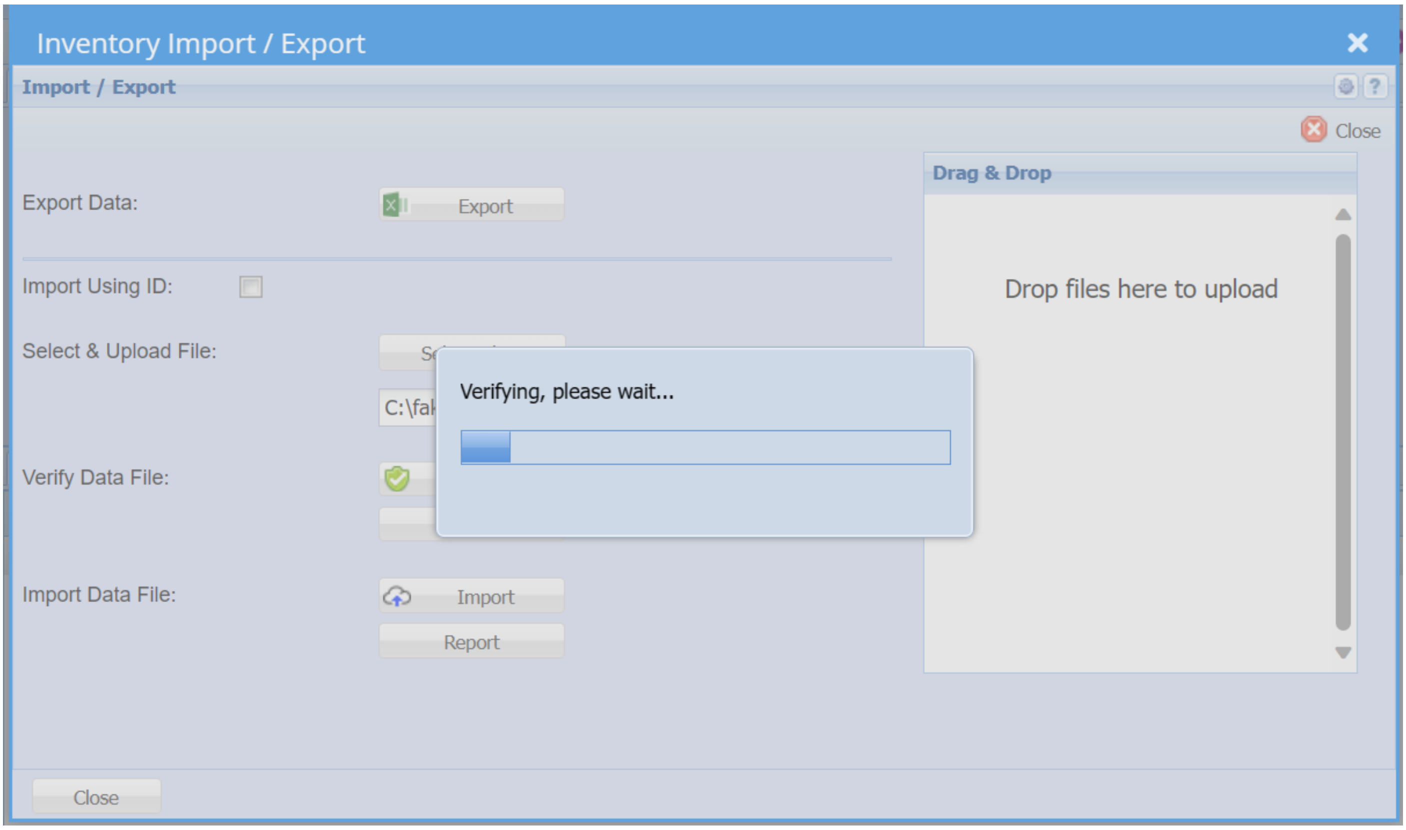
Find the corresponding line in Excel to fix or find where the issue is



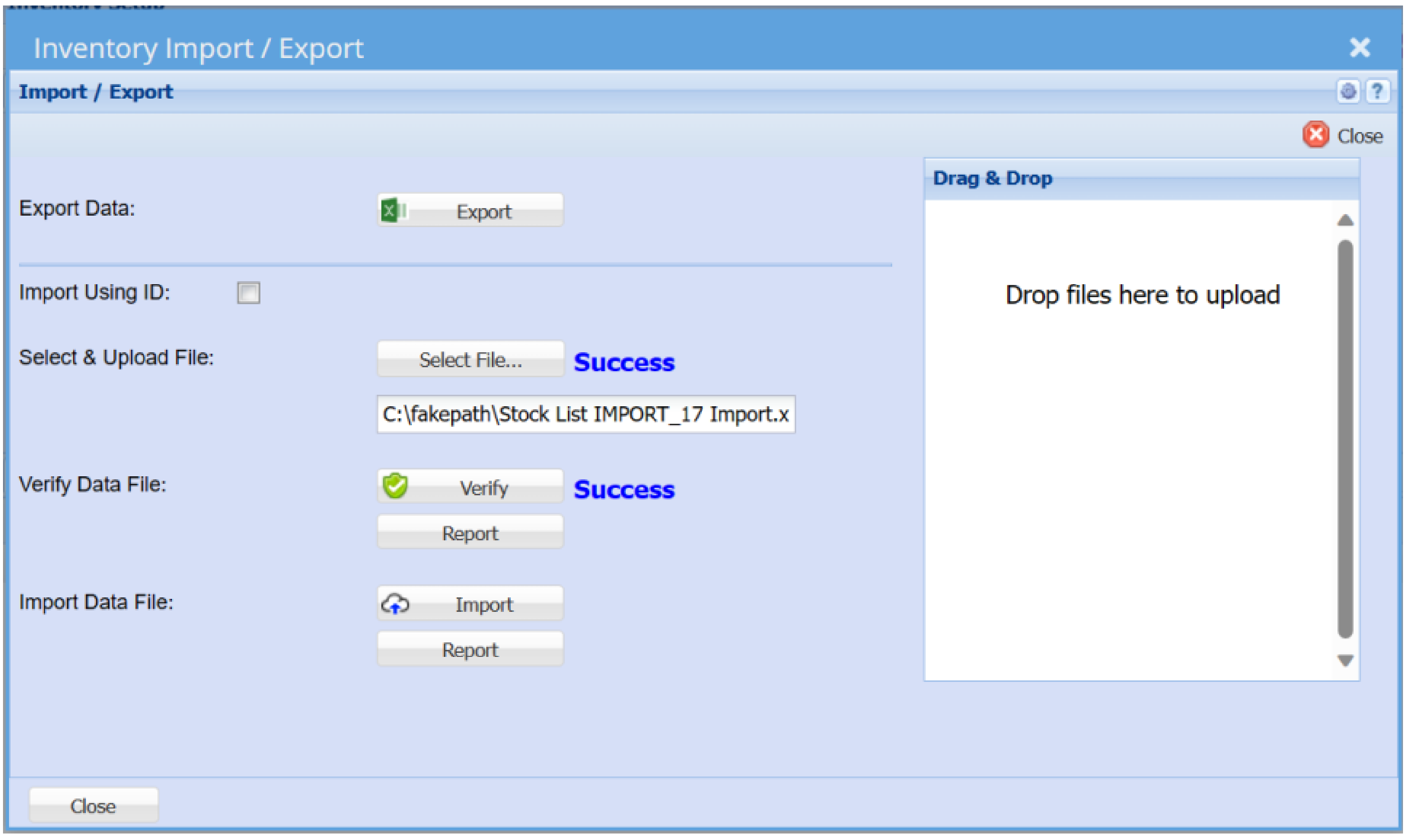
After all the errors have been sorted, save and close your Excel file

Close the Import Export window to re-upload

Verify the data again



Once the Verify is successful, move to importing the data



Document Grid Import and Export Standards

fix grid imports and make them standard for import and export from documents

All imports to be CSV and semicolon enabled

See new layout formats that conforms to both debtors and creditors

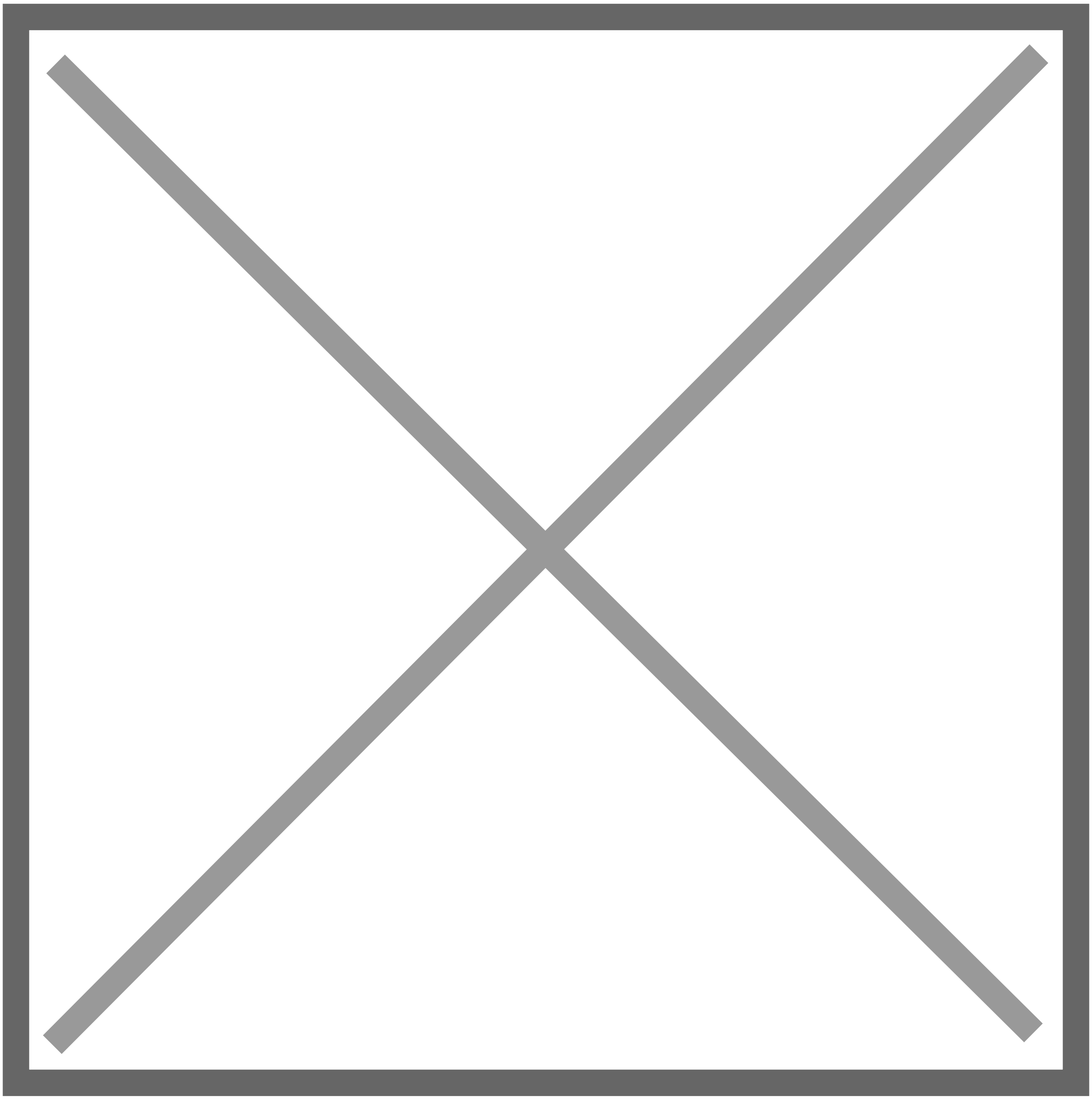
The grid import and exports for Debtors are as follows:

1.Quote

2.Sales Order

3.Invoice

4.Credit Note

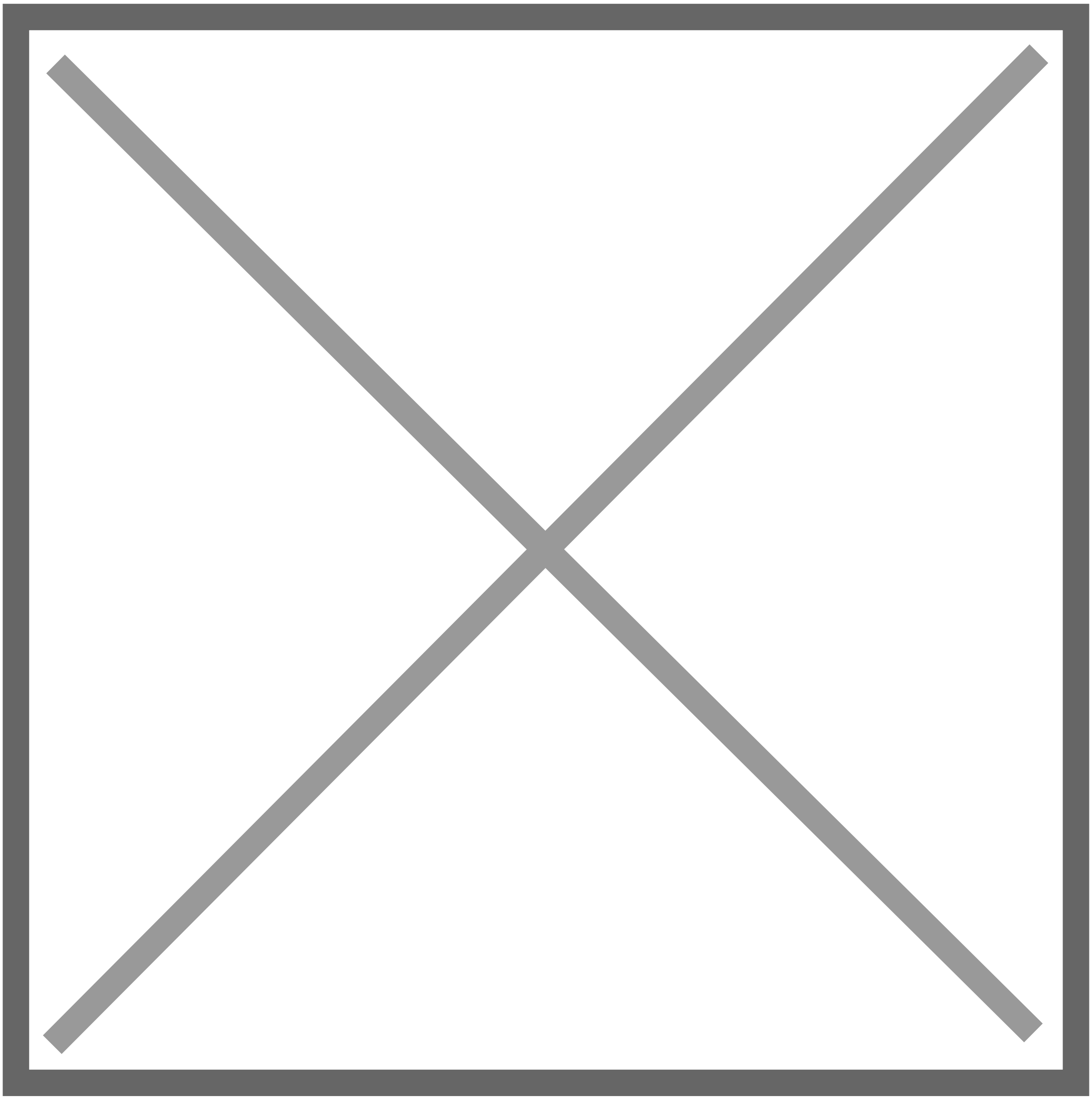


Creditors

1.Purchase Order

2.GRV

3.Stock Return



For the VAT Type of each line

The following rule applies

1.If the customer or supplier has a VAT type set, use that for all items

2.Otherwise use the default VAT types for each document

Warehouse import

If the item is a service or custom, ignore the warehouse field

If an item does not have a warehouse selected for import and is blank, use company default

For Creditor document imports

If there are any service items in the import ignore them for creditor document imports

For Job CTC import for whether it is CTC or SC. Use CTC as default is nothing is set

For imports, only the first number of fields are required, ignore the rest

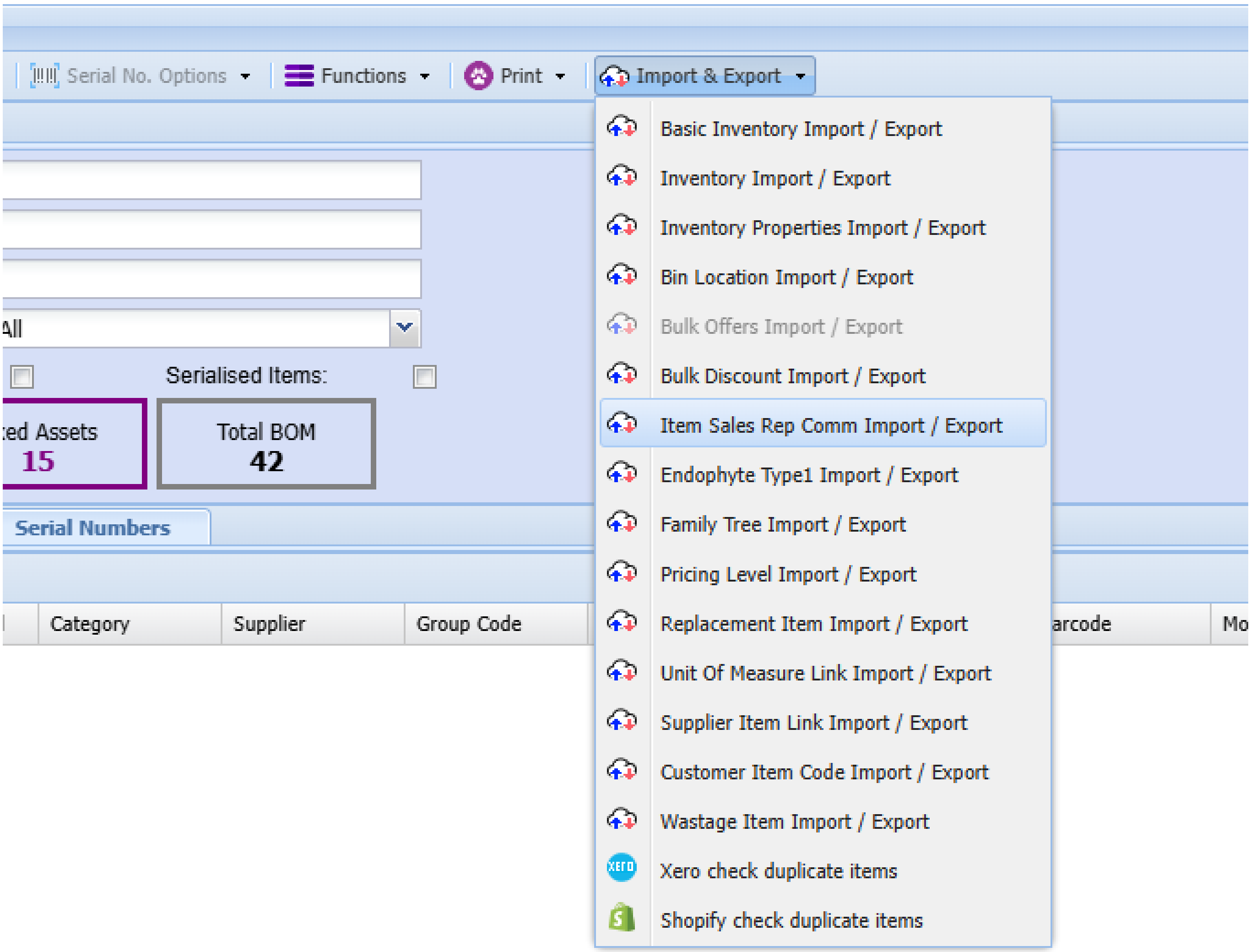
When importing grids on any of the documents who are multicurrency. The cost needs to be updated with the value of the multicurrency.

Sequence number. If blank, put in a sequence number from 1 onwards

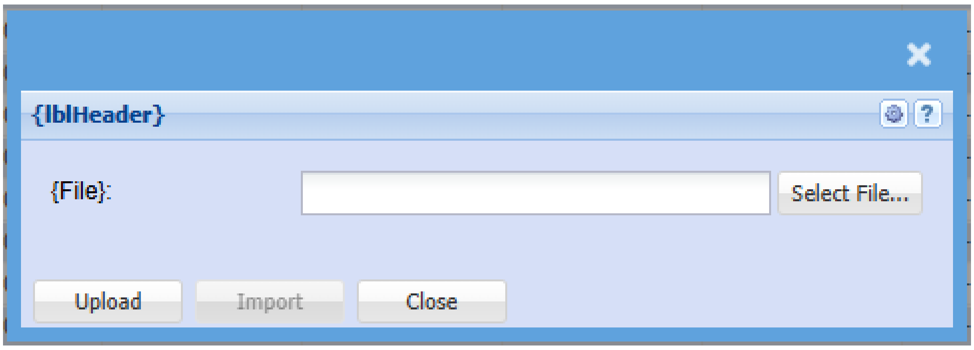
Excel Imports and Exports

We have more import and export excel features coming up

See examples in the image below:



Printing


{lblHeader}
{File}:
Select File...
Upload
Import
Close