

# Import Export Menu

## Imports

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# 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.

Debtor Import / Export

Import / Export

Export Data: Export

Import Using ID: ☐

Select & Upload File: Select File...

Verify Data File: Verify Report

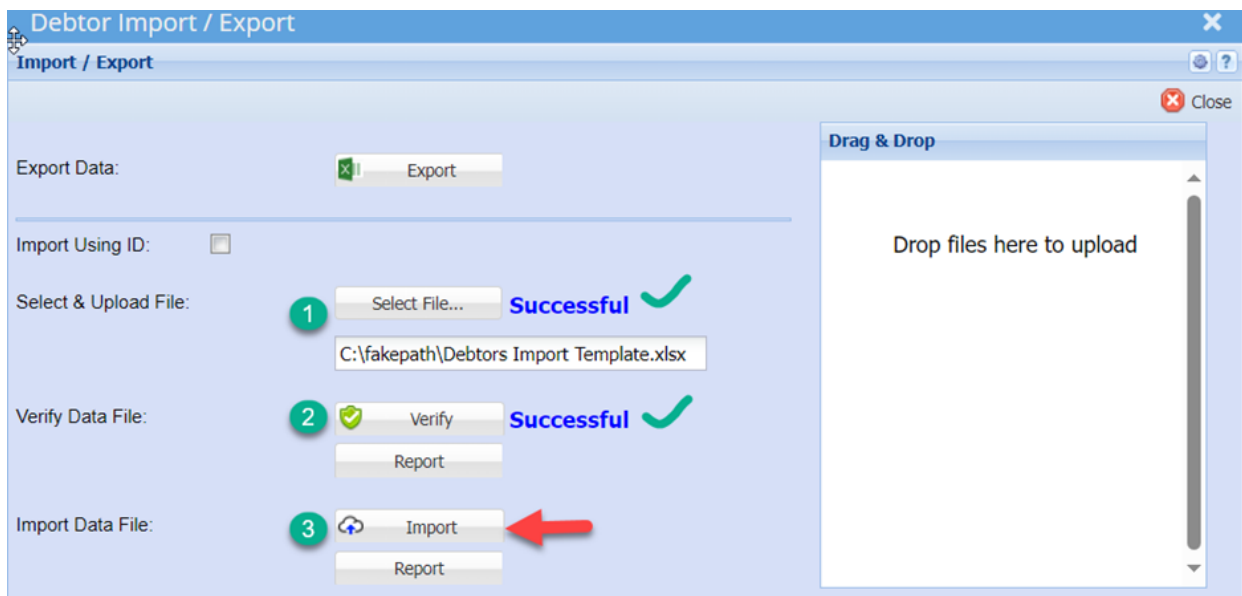
Import Data File: Import Report

Drag & Drop

Drop files here to upload

Close

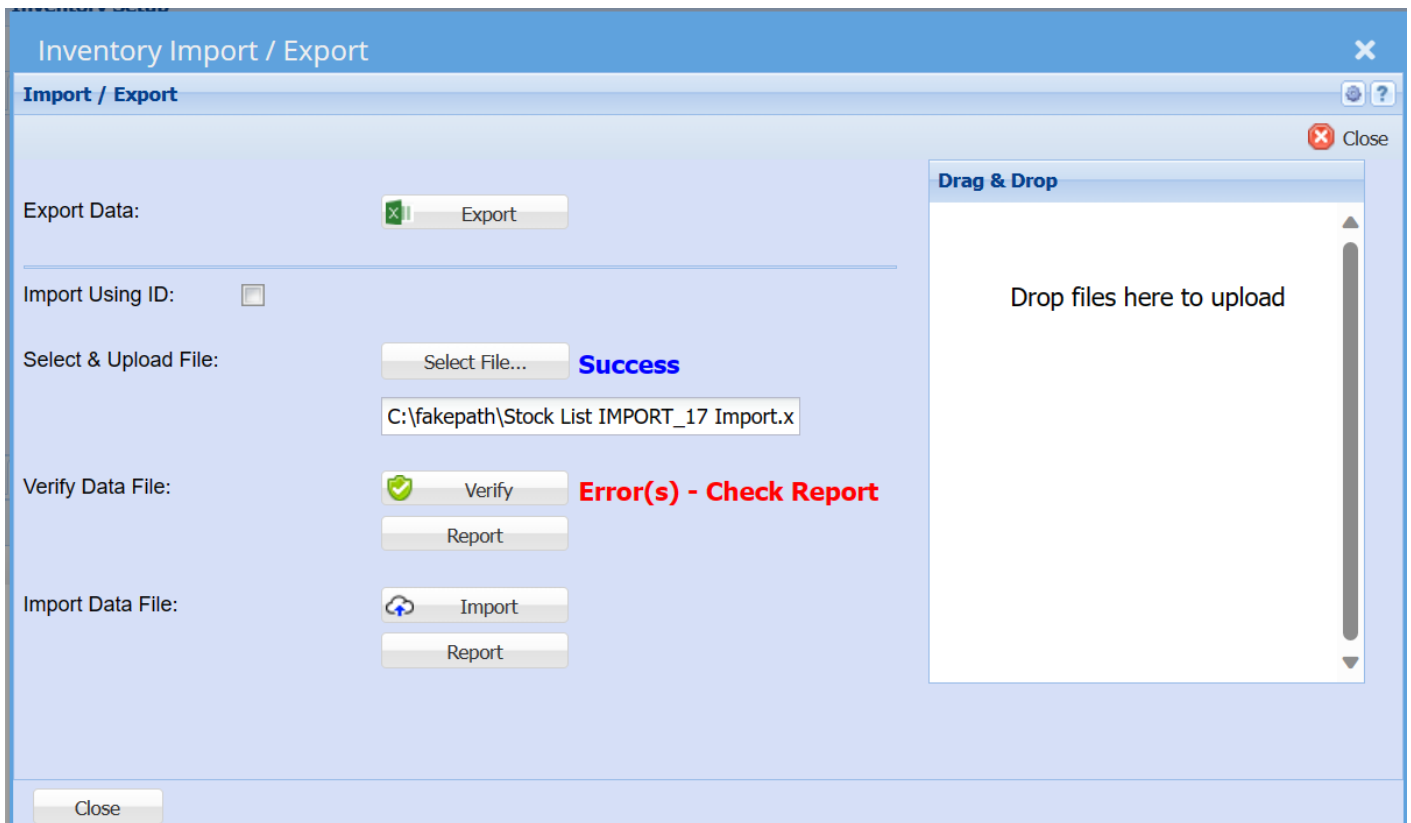
|                                 |                                                                                                                                                                                                                                                                        |
|---------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Export</b>                   | You can click the Export button which will return the existing data listing into the required template for import                                                                                                                                                      |
| <b>Import Using ID</b>          | 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. |
| <b>Select &amp; Upload File</b> | Click the <b>Select File</b> Button to open your file explorer: search and select the import file you saved in the above step.                                                                                                                                         |
| <b>Verify</b>                   | Click the Verify button to check for any errors on the import file                                                                                                                                                                                                     |
| <b>Import</b>                   | 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 Ctrl + G to enter the Line number with A9952

PrintEmailCopy

Inventory Import Report

Close

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

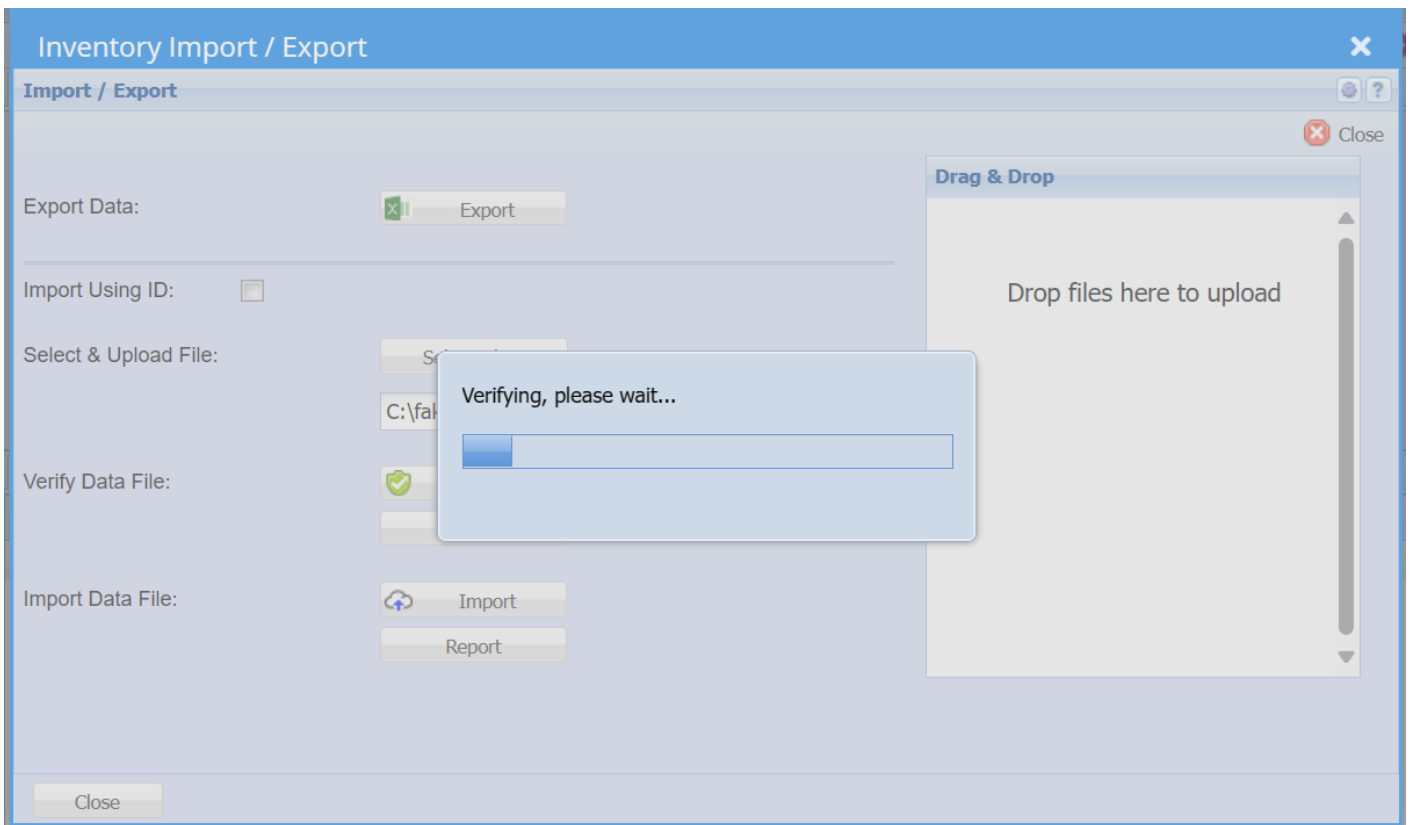
The screenshot shows the Microsoft Excel interface with the 'Go To' dialog box open. The dialog box has a 'Go to:' field containing a list of cell references: \$A\$24878, \$A\$24866, \$B\$24183, and \$B\$22845. Below this list is a 'Reference:' field containing 'A24878'. The 'Special...' button is highlighted. A red box is drawn over the text 'Ctrl + G' in the center of the dialog box.

|       | A               | B                                    | C    | AF     | AG         | AH  | AI    | AJ    | AK    |
|-------|-----------------|--------------------------------------|------|--------|------------|-----|-------|-------|-------|
| 1     | StockCode       | ShortDescription                     | Acti | Catego | Sub-Catego | Oth | Field | Field | Field |
| 22965 | WCL08           | M8 Contact Lock Washer *Nett*        | 1    | W      |            | 850 |       |       |       |
| 22966 | WCL10           | M10 Contact Lock Washer *Nett*       | 1    | W      |            | 850 |       |       |       |
| 22967 | WCL12           | M12 Contact Lock Washer *Nett*       | 1    | W      |            | 850 |       |       |       |
| 22968 | WCON16          | M16 Conica                           |      |        |            | 850 |       |       |       |
| 22969 | WCON16*39*4     | M16 x 39 x 4                         |      |        |            | 850 |       |       |       |
| 22970 | WCON16*45*8*14  | M16 x 45 x 8                         |      |        |            | 850 |       |       |       |
| 22971 | WCON20          | M20 Conica                           |      |        |            | 850 |       |       |       |
| 22972 | WCON20*45*8*14  | M20 x 45 x 8                         |      |        |            | 850 |       |       |       |
| 22973 | WCON24          | M24 Conica                           |      |        |            | 850 |       |       |       |
| 22974 | WCONS410*23*2.5 | M10 x 23 x 2.5                       |      |        |            | 850 |       |       |       |
| 22975 | WCONS412*29*3   | M12 x 29 x 3                         |      |        |            | 850 |       |       |       |
| 22976 | WCONS414*34*3.6 | M14 x 34 x 3.6                       |      |        |            | 850 |       |       |       |
| 22977 | WCS406          | No 6G Cup                            |      |        |            | 130 |       |       |       |
| 22978 | WCS408          | No 8G Cup                            |      |        |            | 130 |       |       |       |
| 22979 | WCS410          | No 10G Cup                           |      |        |            | 130 |       |       |       |
| 22980 | WCS412          | No 12G Cup                           |      |        |            | 130 |       |       |       |
| 22981 | WCS414          | No 14G Cup                           |      |        |            | 130 |       |       |       |
| 22982 | WELD108-16      | 108-16 Spatter D                     |      |        |            | 178 |       |       |       |
| 22983 | WELD10N25S      | 10N25S 3.2mm C                       |      |        |            | 178 |       |       |       |
| 22984 | WELD1420003     | 1420003 -Tip Holder Binzel 240A *Net | 1    | X      |            | 178 |       |       |       |
| 22985 | WELD211195*1    | 211195 1.6mm Bronze Braising Rod 1K  | 1    | X      |            | 178 |       |       |       |

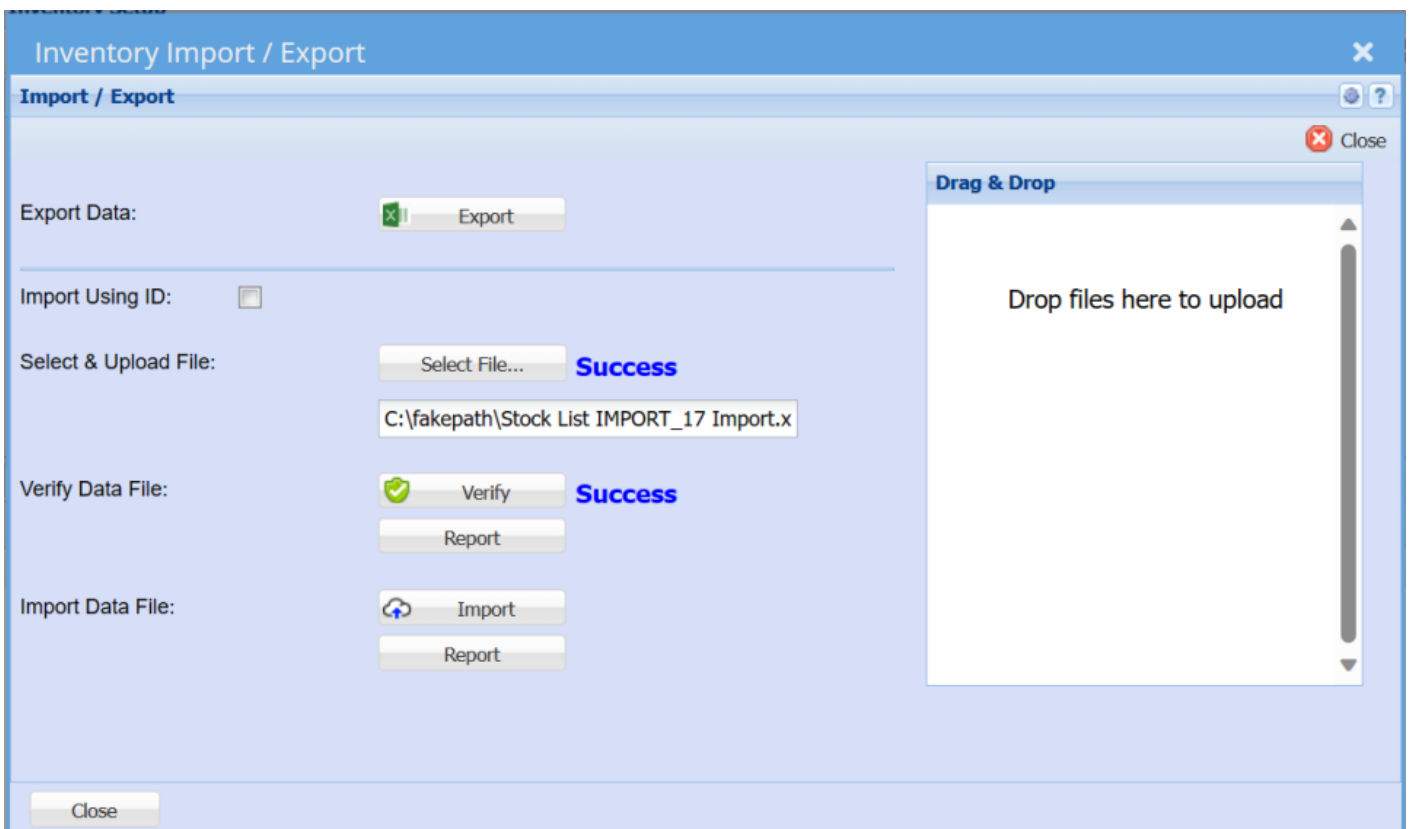
After all the errors have been sorted, save and close your Excel file

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

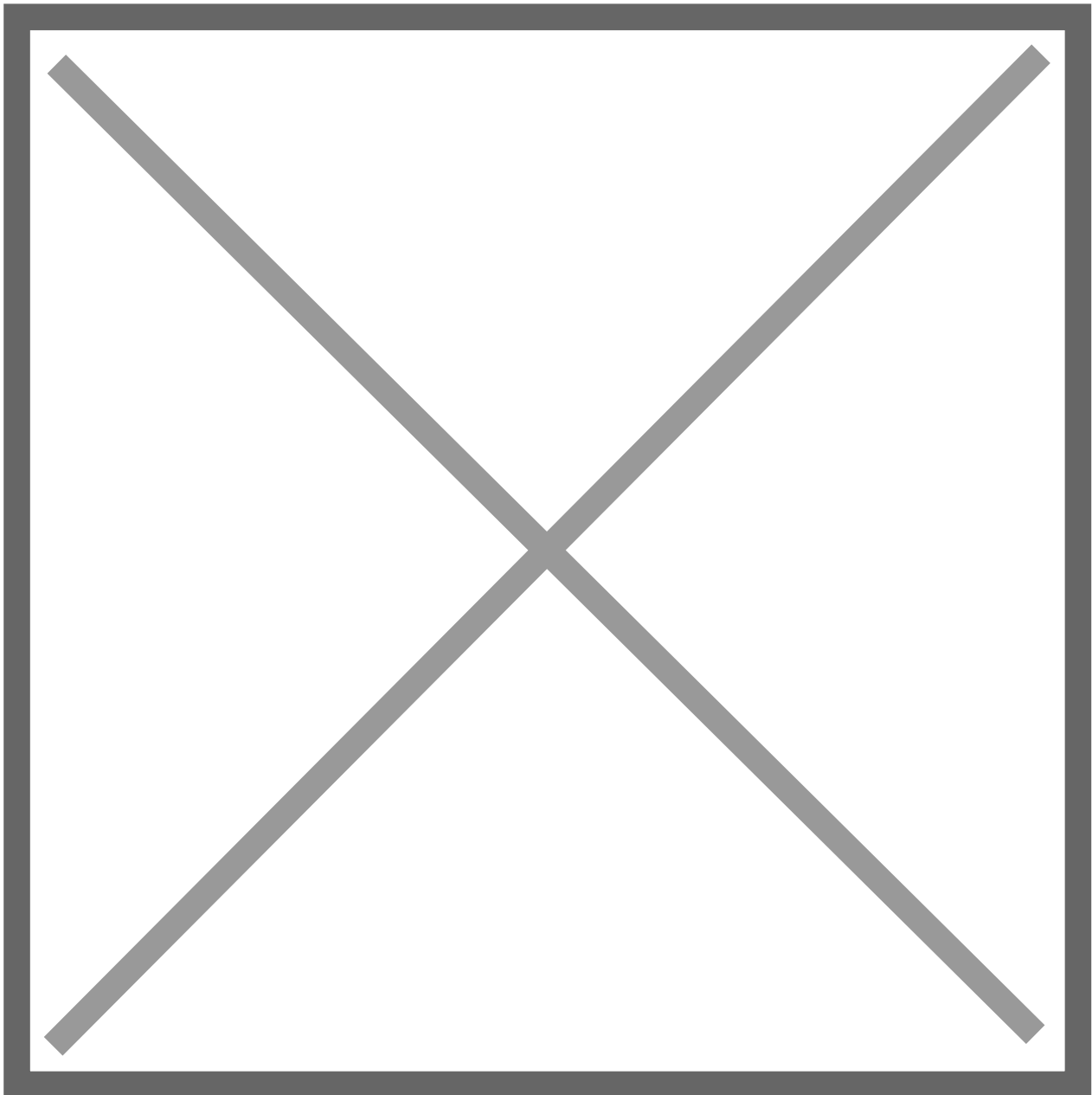
All imports to be CSV and semicolon enabled

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



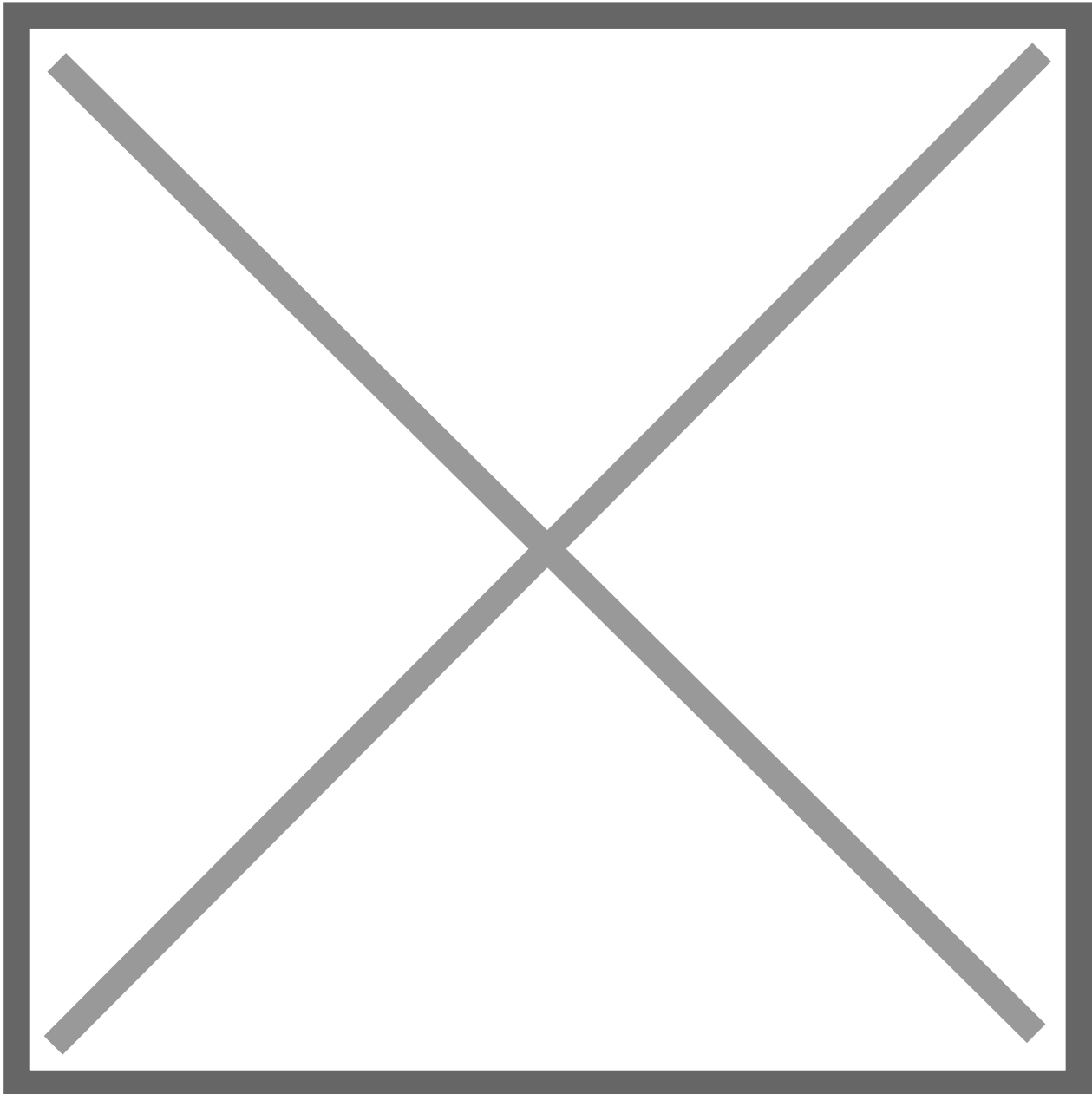


Creditors

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

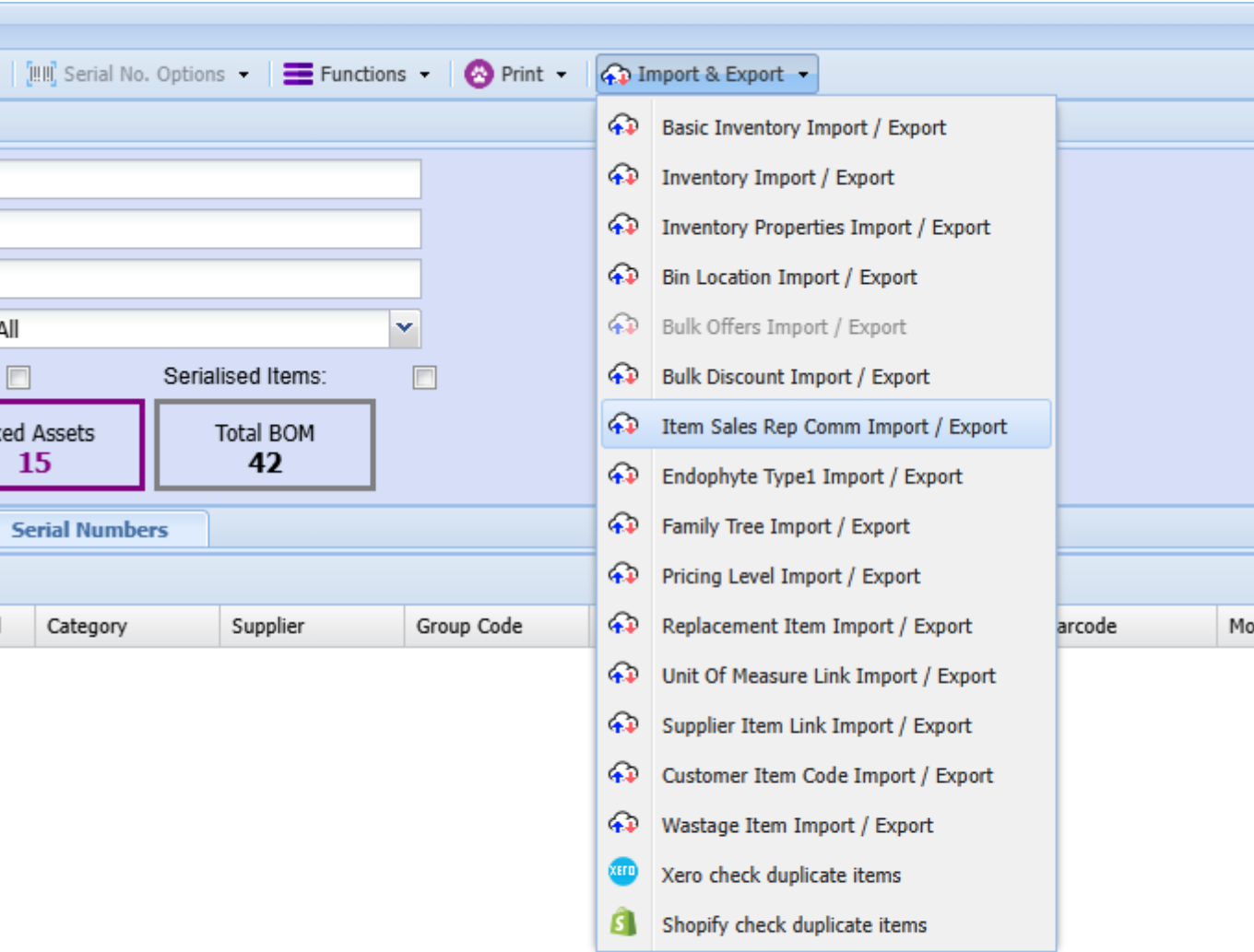
When importing grids on any of the documents who are multicurrency. The cost needs to be updated with the value of the multicurrency.

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:



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## Printing

×

{IblHeader}

⚙️

?

{File}:

Select File...

Upload

Import

Close