

Vendors Import Guide

Importing from Excel

Instead of updating individual records one at a time, AdvancePro allows you to add or update information about your customers, products and vendors in a batch by importing from Microsoft Excel. Customer specific pricing for specific products can be imported as well.

Import Schemas

Download the following schema to prepare your data for importing into AdvancePro:

[Vendors Import Schema](#)

RULES TO FOLLOW WHEN IMPORTING A SPREADSHEET:

1. Please make sure to avoid spaces in headers. Use underscores instead.

For Example:

- COMPANY NAME – incorrect
 - COMPANY_NAME - correct
2. The first sheet must be named “Sheet1”. Notice that there is no space between ‘Sheet’ and ‘1’.
 3. No other sheets should exist except for ‘Sheet1’.
 4. Make sure to save the file as an ‘.XLS’ file.
 5. Format everything to ‘Text’ format.

NOTES:

- You can have any name for the headers as long as you follow rule #1 and avoid using special characters.
- The order of the headers does not matter.

Importing Customers

Before proceeding with your vendor import, you may wish to download and review [‘Sample Vendors Import Schema.xls’](#).

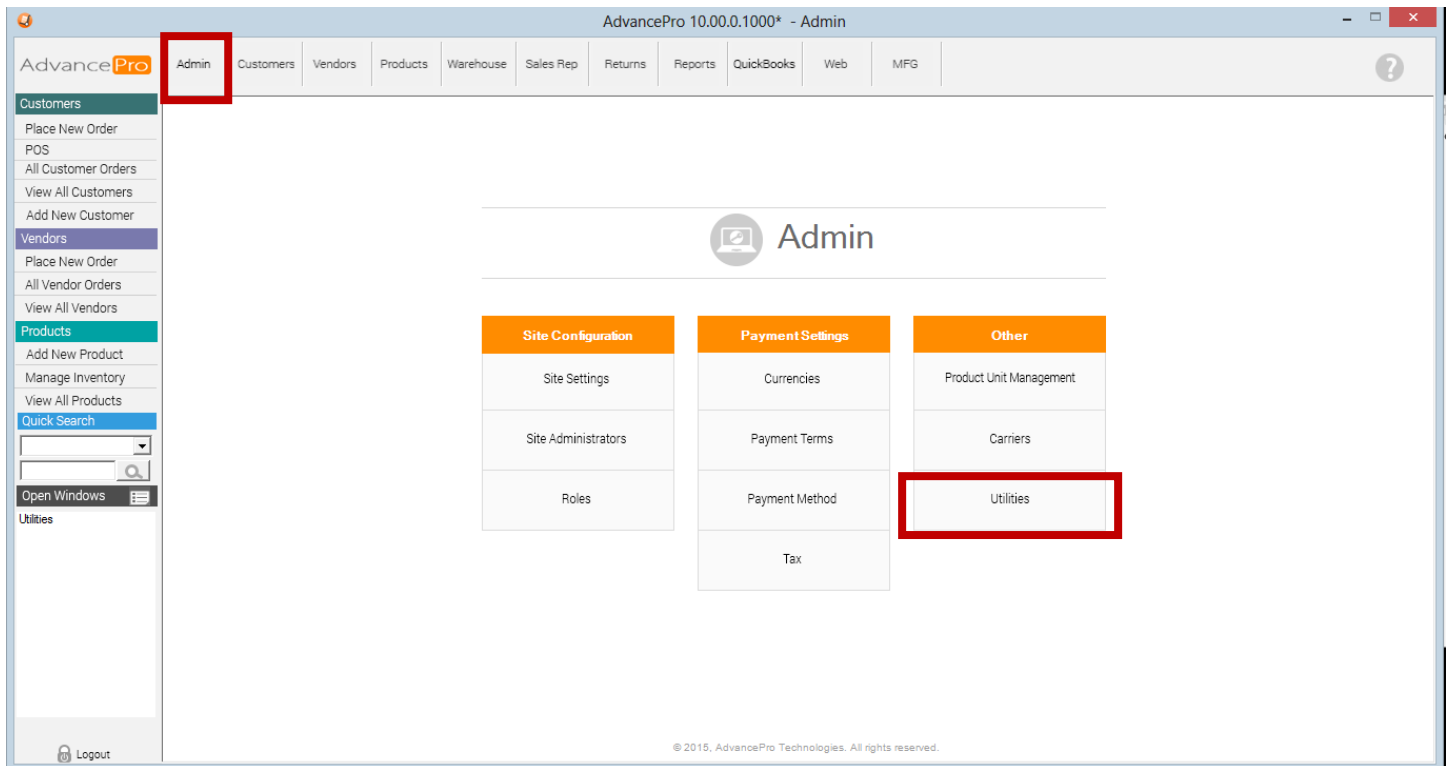
1. Create the spreadsheet of vendors that you will be importing and save it as a ‘.XLS’ file. You can fill out the ‘Vendors Import Schema’ with your information.

NOTE: COMPANY_NAME is a required field in your spreadsheet. The rest are optional.

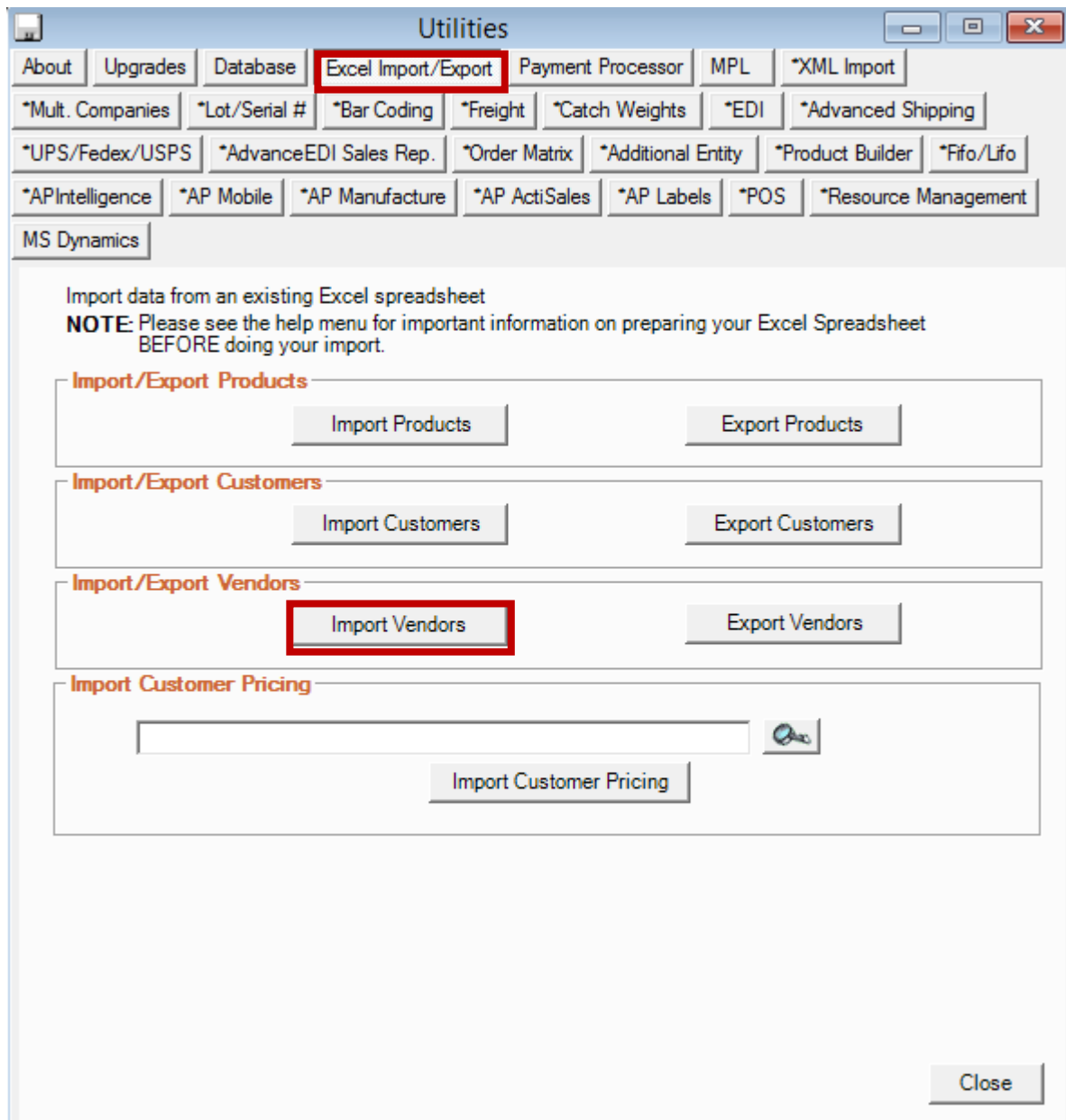
COMPANY_NAME	ACCOUNT_NUMBER	FIRST_NAME	LAST_NAME	PHONE	EMAIL	STREET	CITY	STATE	ZIP	COUNTRY
World of Chicken Association	1999 9999 1111 1111	Maximus	Chicklet	999-1111111	Maximus@chickenworld.com	1st Chicken World Street	Chicken City	CN	CCC991	Canada
National Chicken Corporation	1999 9999 1111 1112	Harold	Chicklet	999-1111112	Harold@nationalchicken.com	1st National Chicken Street	Chicken City	CN	CCC992	Canada
World of Beef Association	2999 9999 2222 2221	Primus	Beefed	999-2222221	Primus@beefworld.com	1st Beef World Street	Beef City	BF	BBB991	Canada
National Beef Corporation	2999 9999 2222 2222	Jett	Beefed	999-2222222	Jett@nationalbeef.com	1st National Beef Street	Beef City	BF	BBB992	Canada
World of Pork Association	3999 9999 3333 3331	Octavius	Perky	999-3333331	Octavius@porkworld.com	1st Pork World Street	Pork City	PK	PPP991	Canada
National Pork Corporation	3999 9999 3333 3332	Jack	Perky	999-3333332	Jack@nationalpork.com	1st National Pork Street	Pork City	PK	PPP992	Canada
World of Vegetable Association	4999 9999 4444 4441	Optimus	Green	999-4444441	Optimus@vegetableworld.com	1st Vegetable World Street	Vegetable City	VG	VVV991	Canada
National Vegetable Corporation	4999 9999 4444 4442	Jed	Green	999-4444442	Jed@nationalvegetable.com	1st National Vegetable Street	Vegetable City	VG	VVV992	Canada
World of Fruit Association	5999 9999 5555 5551	Dafamous	Fruitless	999-5555551	Dafamous@fruitworld.com	1st Fruit World Street	Fruit City	FT	FFF991	Canada
National Fruit Corporation	5999 9999 5555 5552	Moe	Fruitless	999-5555552	Moe@nationalfruit.com	1st National Fruit Street	Fruit City	FT	FFF992	Canada

2. Prior to importing any files into AdvancePro, it is highly recommended to create a backup of your current database. Instructions for backing up can be found in our [Knowledge Base](#).

3. Access the “Utilities” menu in AdvancePro.
 - 1) Click “Admin” to bring up the Admin panel.
 - 2) Click “Utilities” to access the Utilities menu.



4. Access the “Import Vendors” screen.
 - 3) Click “Excel Import/Export”
 - 4) Click “Import Vendors”



5. Select the file you would like to import and map your headers to the correct AdvancePro fields.
 - 1) Click “Browse” and find the file that you would like to import. This will populate the headers from your Excel file on the right-hand side.
 - 2) Match your headers to the AdvancePro fields and click “Map”.
 - 3) Once you have finished mapping your fields, click “Next”.

Utilities

About Upgrades Database Excel Import/Export Payment Processor MPL *XML Import

*Mult. Companies *Lot/Serial # *Bar Coding *Freight *Catch Weights *EDI *Advanced Shipping

Vendors Import

Map Fields Ready To Import

Select Excel File

Locate the Excel file to import

C:\Users\jared\Desktop\vendorimport.xls **Browse**

Map Fields

Match up the AdvancePro field on the LEFT with your Excel field on the RIGHT and press "MAP".

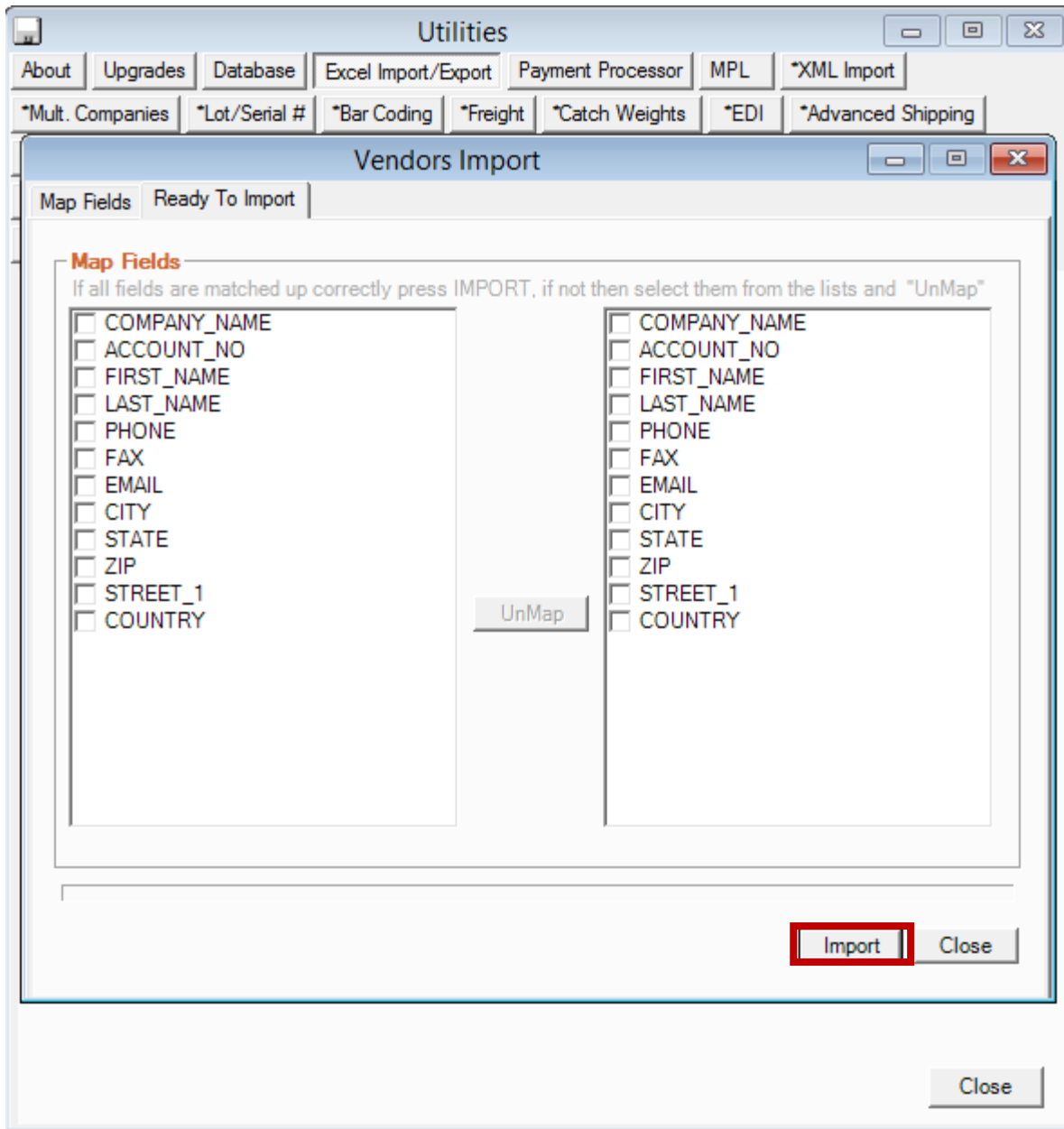
AdvancePro Field	Excel Field
<input checked="" type="checkbox"/> COMPANY_NAME	<input checked="" type="checkbox"/> COMPANY_NAME
<input type="checkbox"/> ACCOUNT_NO	<input type="checkbox"/> ACCOUNT_NO
<input type="checkbox"/> FIRST_NAME	<input type="checkbox"/> FIRST_NAME
<input type="checkbox"/> LAST_NAME	<input type="checkbox"/> LAST_NAME
<input type="checkbox"/> PHONE	<input type="checkbox"/> PHONE
<input type="checkbox"/> FAX	<input type="checkbox"/> FAX
<input type="checkbox"/> EMAIL	<input type="checkbox"/> EMAIL
<input type="checkbox"/> STREET_1	<input type="checkbox"/> CITY
<input type="checkbox"/> STREET_2	<input type="checkbox"/> STATE
<input type="checkbox"/> CITY	<input type="checkbox"/> ZIP
<input type="checkbox"/> STATE	<input type="checkbox"/> STREET_1
<input type="checkbox"/> ZIP	<input type="checkbox"/> COUNTRY
<input type="checkbox"/> COUNTRY	
<input type="checkbox"/> ADDRESS_NAME	
<input type="checkbox"/> SHIPPING_FIRST_NAME	
<input type="checkbox"/> SHIPPING_LAST_NAME	

Map

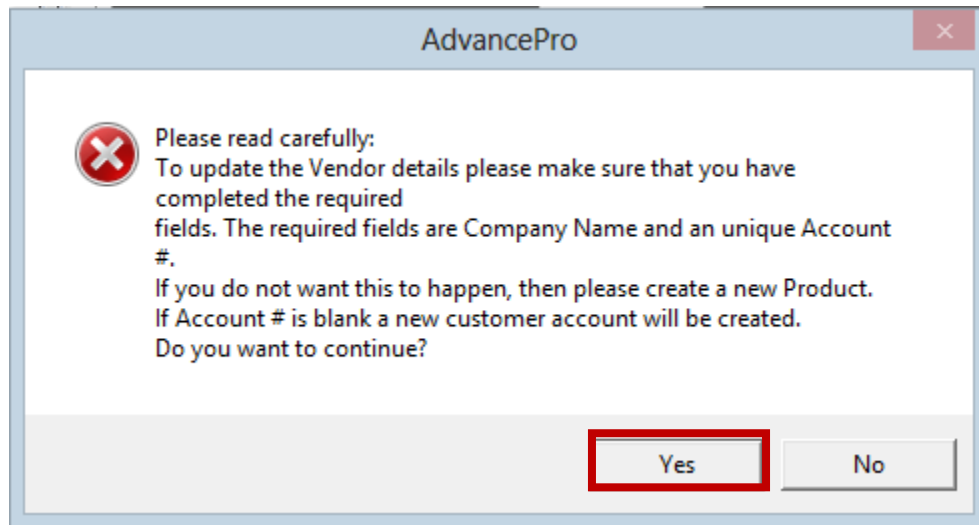
☐ Add new address (If different) **Next** **Close**

Close

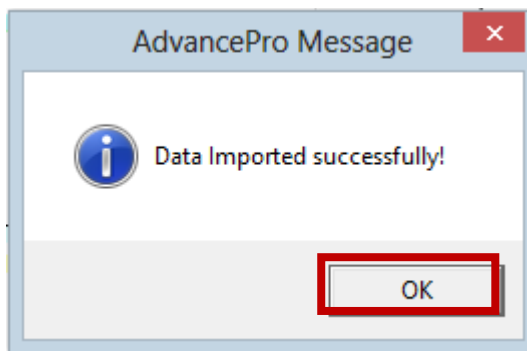
- AdvancePro will then provide you with an opportunity to confirm your mapping. Once you are satisfied that the fields have been mapped correctly, click "Import".



- AdvancePro will alert you of important changes that will happen once you confirm your import. Once you have read and understood the message, click "Yes" to proceed with your import.



8. You will then receive a message confirming that your import has been completed successfully. Click “OK” and your import will be complete.



9. For further help, [visit the knowledge base](#).