Starting right now: Your SAP Business One Cloud test system will be ready in 3 minutes>

SAP Business One 10.0
Data import from Excel (Business Partner / Item / Price lists /
BP-numbers / Bill of Materials)
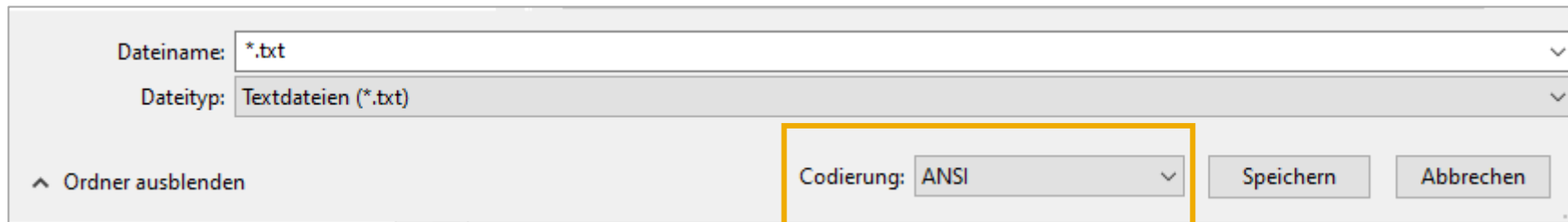October 2024

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Data import from Excel

You can import data from a Microsoft Excel file into SAP Business One.

Beware:

- Texts must not contain line breaks
- If prices are imported via article import, the ME code column must contain a value.
- Microsoft Excel files must be saved and imported as TXT files, the encoding of the TXT file must be **ANSI**

- TXT files must be closed before importing
- TXT files may only contain data to be imported and <u>no header line</u> nor <u>blank lines</u>!
- For the time of the data import, the numbering series for items / business partners must allow the manual numbering method (Administration > System initialization > Document Numbering > Items / Business Partners – Customer / Business Partners – Vendor)
- The number of characters in the cells of the Microsoft Excel table must not exceed the <u>length</u> of the corresponding field in SAP Business One, information on the data type can be found in the data import templates
https://business-one-consulting.com/wp-content/uploads/2021/03/conesprit_Template-for-data-import-from-Excel-1.xlsx

Please test the data import in a test database before you import the data into your productive database!

No other users should be logged in during the import.

Data import of business partner master

Carry out data import in a test system. If the import in the test system has been successful, the import can be carried out in the productive system.

1. Create an Excel file with the data to be imported, a template for the data import can be found here:
   https://business-one-consulting.com/wp-content/uploads/2021/03/conesprit_Template-for-data-import-from-Excel-1.xlsx
2. Save the Excel file as TXT, delete the title lines and make sure that the TXT file does not contain any blank lines
3. Under Administration > Data Import/Export > Data Import > Import from Excel > File type for import: select **Business Partner**
4. Select the TXT file
5. Assign the columns in the Excel file to the corresponding fields in SAP Business One
6. Select import method
7. Data mapping can be saved as a template for future reuse
8. Press import
9. SAP Business One provides feedback on the success of the import. Typical errors when importing are: Empty lines in the TXT file as well as incorrect data types as defined by SAP (refer to information in the template)
10. When the import into the test system has been carried out successfully, the import into the productive system can take place

Data import of item master data

Carry out data import in a test system. If the import in the test system has been successful, the import can be carried out in the productive system.

1. Create an Excel file with the data to be imported, a template for the data import can be found here:
   https://business-one-consulting.com/wp-content/uploads/2021/03/conesprit_Template-for-data-import-from-Excel-1.xlsx
2. Save the Excel file as TXT, delete the title lines and make sure that the TXT file does not contain any blank lines
3. Under Administration > Data Import/Export > Data Import > Import from Excel > File type for import: select **Items**
4. Select the TXT file
5. Assign the columns in the Excel file to the corresponding fields in SAP Business One
6. Select import method
7. Data mapping can be saved as a template for future reuse
8. Press import
9. SAP Business One provides feedback on the success of the import. Typical errors when importing are: Empty lines in the TXT file as well as incorrect data types as defined by SAP (refer to information in the template)
10. When the import into the test system has been carried out successfully, the import into the productive system can take place

Data import of business partner catalog numbers

Administration > Data Import/Export > Data Import > Import from Excel

Carry out data import in a test system. If the import in the test system has been successful, the import can be carried out in the productive system.

1. Create an Excel file with the data to be imported, a template for the data import can be found here:
   https://business-one-consulting.com/wp-content/uploads/2021/03/conesprit_Template-for-data-import-from-Excel-1.xlsx
2. Save the Excel file as TXT, delete the title lines and make sure that the TXT file does not contain any blank lines
3. Under Administration > Data Import/Export > Data Import > Import from Excel > File type for import: select **Business Partner Catalog Numbers**
4. Select the TXT file
5. Assign the columns in the Excel file to the corresponding fields in SAP Business One
6. Select import method
7. Data mapping can be saved as a template for future reuse
8. Press import
9. SAP Business One provides feedback on the success of the import. Typical errors when importing are: Empty lines in the TXT file as well as incorrect data types as defined by SAP (refer to information in the template)
10. When the import into the test system has been carried out successfully, the import into the productive system can take place

Create Bill of Materials list by copying from Excel

Production > Bill of Materials

Carry out data import in a test system. If the import in the test system has been successful, the import can be carried out in the productive system.

1. Call up parts list in add mode
2. Select assembly
3. Copy parts list composition from Excel file
4. Place the input pointer in the first line of the parts list in the No. field, right-click "insert"
5. The composition of the parts list from Excel is inserted into the parts list
6. Select Control and Add

Maintain price list by copying from Excel

Carry out data import in a test system. If the import in the test system has been successful, the import can be carried out in the productive system.

1. Call price list, each price list contains all articles in the database
2. Export price list from SAP Business One to Excel
3. If necessary, change the columns of the Excel file for basic price list, factor and price or provide them with values for the first time
4. Copy the contents from the Excel columns base price list, factor and price and paste them into the first line of the price list
5. Check and update the price list

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