Creating Hierarchies when Importing from Excel

When using **Import from Excel** from a Job or Price List you can now create a hierarchy with Trades and Headings.

You have always been able to select **Heading** or **Trade Description** as a **Source column** from the **Import Excel** window, but you could only set a single Trade Heading and not multiple headings.

Using **Ref Codes**, and assigning **Heading Ref Codes** as a **Source column**, you can create as many levels of Headings as you like.

To use **Heading Ref Codes**, your **Microsoft Excel** file needs to have **Reference Codes** assigned to the Items and Headings. **Reference Codes** are often just called **Ref Codes** and they are unique codes assigned to every item in your Estimate. If you are creating a new Job or Price List, you can create your own **Ref Codes**, but they cannot be longer than 100 characters. By default, Cubit will create **Ref Codes** for you; for the Item sheet they will be prefixed by CB and followed by a number for example **CB12** or **CB378**.
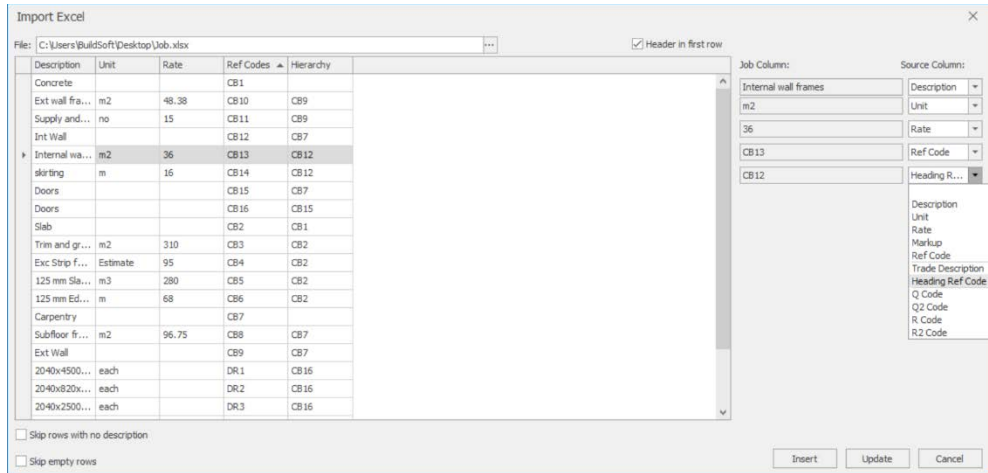
	A	B	C	D	E
1	Description	Unit	Rate	Ref Codes	Hierarchy
2	Concrete			CB1	
3	Slab			CB2	CB1
4	Trim and grade under slab	m2	310.00	CB3	CB2
5	Exc Strip footings	Estimate	95.00	CB4	CB2
6	125 mm Slab on ground	m3	280.00	CB5	CB2
7	125 mm Edge form to slab	m	68.00	CB6	CB2
8	Carpentry			CB7	
9	Subfloor framing and sheet	m2	96.75	CB8	CB7
10	Ext Wall			CB9	CB7
11	Ext wall frames	m2	48.38	CB10	CB9
12	Supply and install studs to external walls	no	15.00	CB11	CB9
13	Int Wall			CB12	CB7
14	Internal wall frames	m2	36.00	CB13	CB12
15	skirting	m	16.00	CB14	CB12
16	Doors			CB15	CB7
17	Doors			CB16	CB15
18	2040x4500x35mm Door Counts	each		DR1	CB16
19	2040x820x35mm Door Counts	each		DR2	CB16
20	2040x2500x35mm Door Counts	each		DR3	CB16
21	2040x1100x35mm Door Counts	each		DR4	CB16
22	2040x770x35mm Door Counts	each		DR5	CB16
23	2040x420x35mm Door Counts	each		DR6	CB16

Like the above example, you can see the **Microsoft Excel** file has two columns, one labelled **Ref Codes** and one labelled **Heading Ref Codes**. The other columns are some standard Items you might find in a Price List.

To import an Excel file with multiple levels of Headings

1. From an open Job or Price List, click the **Excel** button from the **Insert** group in the **Home** ribbon.
2. The **Import Excel** window will open.
3. Click the **...** next to **File**.
4. A window will open and you can browse your computer for the **Excel** file you want to Import.

5. Select the Excel file and click **Open**
6. Beside the Excel preview, you can see the columns of your **Microsoft Excel** file and assign what Source column these are. Ensure you assign a Source Column for Ref Codes and Heading Ref Codes. *You can see an example of this below.*

7. You can check to **Skip rows with no description** and **skip empty rows**.
8. Click **Insert** to insert your Excel file, or click **Update** if you're updating an existing Job or Price List.

Here is what that Excel file would like look when imported into Cubit.