Product Import & Update 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.

In this guide, we highlight the process of importing new products into AdvancePro from an Excel spreadsheet. The instructions in this guide also apply to updating product information, such as product price.

This guide contains:

1. Import Schema
2. Rules to Follow When Importing an Excel Sheet
3. Importing Products
4. Updating Product Info (including pricing)

1. Import Schemas

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

Products Import Schema

2. RULES TO FOLLOW WHEN IMPORTING A SPREADSHEET:

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

   For Example:

   o PRODUCT NAME – incorrect

   o PRODUCT_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.

3. Importing Products

Before proceeding with your product import, you may wish to download and review 'Sample Products Import Schema.xls'.
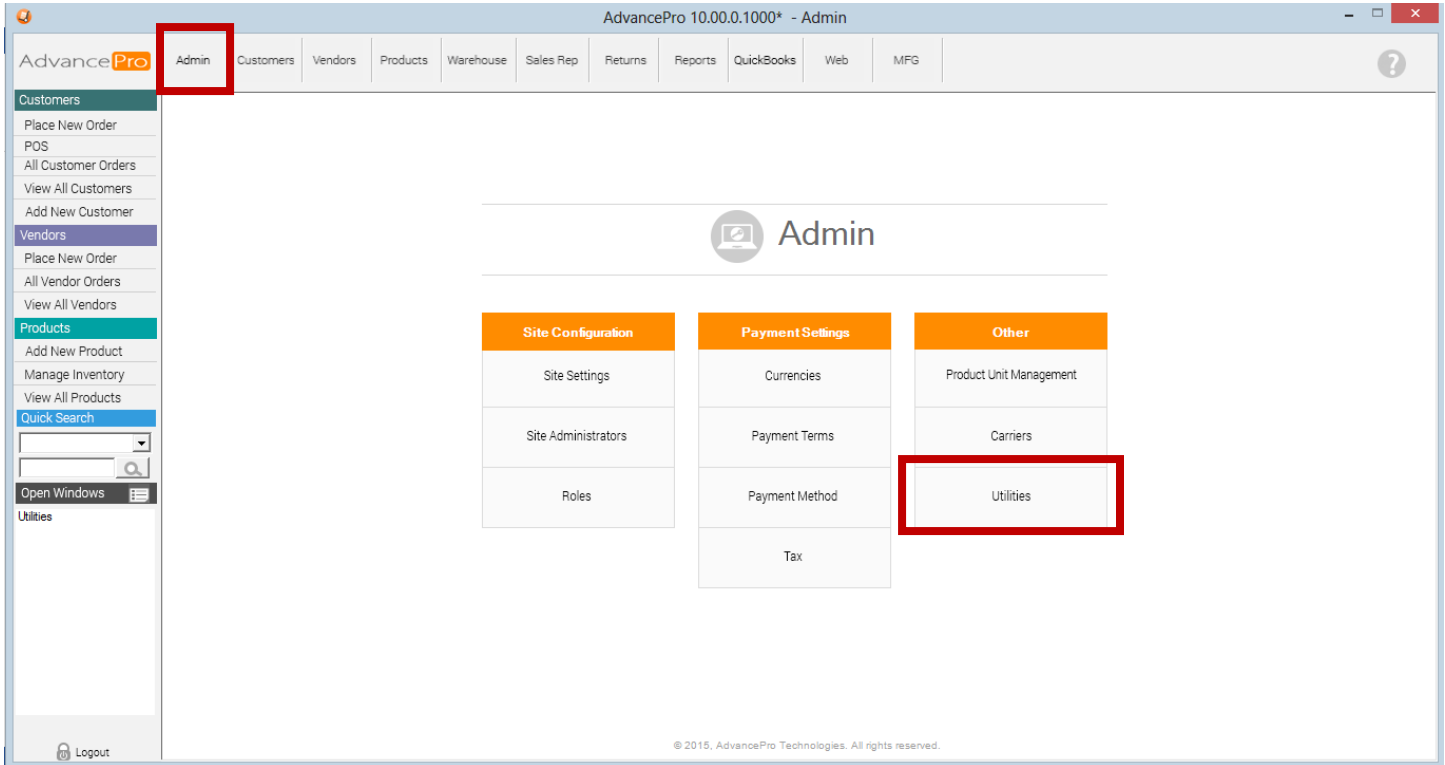
1. Create the spreadsheet of products that you will be importing and save it as an '.XLS' file.
   Fill out the 'Products Import Schema' with your information.
   NOTE: PRODUCT_NAME and SKU are required fields in your spreadsheet. The rest are optional.
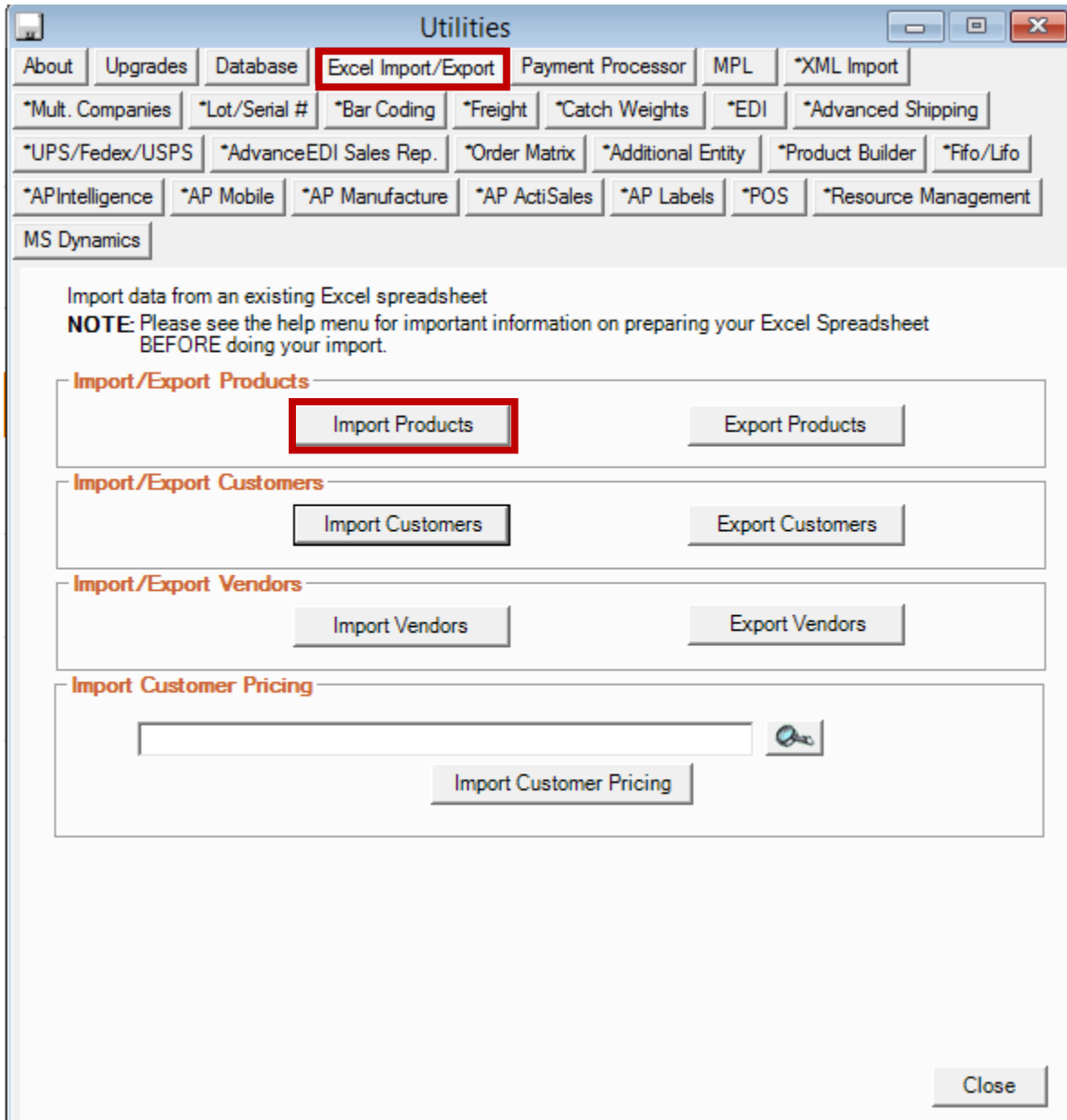
	A	B	C	D	E	F	G	H	I	J	K	L	M
1	PRODUCT_NAME	SKU	CATEGORY	DESCRIPTION	COST_P	SALE_PR	SUGGES	CUSTOMER	IN_STOCK	WEIGH	UPC	VENDOR	VENDOR_ACCOUNT_NUMBER
2	Drum Stick	C00001	Chicken	Part of Chicken	5	4	7	1	1000	5	1110001	World of Chic	1999 9999 1111 1111
3	Chicken Breast	C00002	Chicken	Part of Chicken	5	4	7	1	1000	5	1110002	World of Chic	1999 9999 1111 1111
4	Wings	C00003	Chicken	Part of Chicken	4	3	5	1	1000	5	1110003	World of Chic	1999 9999 1111 1111
5	Neck	C00004	Chicken	Part of Chicken	4	3	5	1	1000	5	1110004	World of Chic	1999 9999 1111 1111
6	Thigh	C00005	Chicken	Part of Chicken	7	5	8	1	1000	5	1110005	World of Chic	1999 9999 1111 1111
7	Liver	C00006	Chicken	Part of Chicken	4	3	5	1	1000	5	1110006	World of Chic	1999 9999 1111 1111
8	Heart	C00007	Chicken	Part of Chicken	4	3	5	1	1000	5	1110007	World of Chic	1999 9999 1111 1111
9	Gizzard	C00008	Chicken	Part of Chicken	4	3	5	1	1000	5	1110008	World of Chic	1999 9999 1111 1111
10	Feet	C00009	Chicken	Part of Chicken	4	3	5	1	1000	5	1110009	World of Chic	1999 9999 1111 1111
11	Tail	C00010	Chicken	Part of Chicken	4	3	5	1	1000	5	1110010	World of Chic	1999 9999 1111 1111
12	Ground Beef	B00001	Beef	Part of Beef	7	6	8	1	1000	5	2220001	World of Beef	2999 9999 2222 2221
13	Sirloin Steak	B00002	Beef	Part of Beef	6	5	7	1	1000	5	2220002	World of Beef	2999 9999 2222 2221
14	T-Bone Steak	B00003	Beef	Part of Beef	6	5	7	1	1000	5	2220003	World of Beef	2999 9999 2222 2221
15	Tenderloin Steak	B00004	Beef	Part of Beef	6	5	7	1	1000	5	2220004	World of Beef	2999 9999 2222 2221
16	Beef Back Ribs	B00005	Beef	Part of Beef	7	6	8	1	1000	5	2220005	World of Beef	2999 9999 2222 2221
17	Beef Cubes	B00006	Beef	Part of Beef	6	5	7	1	1000	5	2220006	World of Beef	2999 9999 2222 2221
18	Shank	B00007	Beef	Part of Beef	6	5	7	1	1000	5	2220007	World of Beef	2999 9999 2222 2221
19	Brisket	B00008	Beef	Part of Beef	6	5	7	1	1000	5	2220008	World of Beef	2999 9999 2222 2221
20	Pork Spare Ribs	P00001	Pork	Part of Pork	7	6	8	1	1000	5	3330001	World of Pork	2999 9999 2222 2221
21	Bacon	P00002	Pork	Part of Pork	6	5	7	1	1000	5	3330002	World of Pork	3999 9999 3333 3331
22	Ham	P00003	Pork	Part of Pork	7	6	8	1	1000	5	3330003	World of Pork	3999 9999 3333 3331
23	Ground Pork	P00004	Pork	Part of Pork	7	6	8	1	1000	5	3330004	World of Pork	3999 9999 3333 3331
24	Pork Back Ribs	P00005	Pork	Part of Pork	7	6	8	1	1000	5	3330005	World of Pork	3999 9999 3333 3331
25	Pork Cubes	P00006	Pork	Part of Pork	6	5	7	1	1000	5	3330006	World of Pork	3999 9999 3333 3331
26	Potato	V00001	Vegetable	Vegetable	4	3	5	1	1000	2	4440001	World of Veg	4999 9999 4444 4441
27	Cabbage	V00002	Vegetable	Vegetable	4	3	5	1	1000	2	4440002	World of Veg	4999 9999 4444 4441
28	Lettuce	V00003	Vegetable	Vegetable	4	3	5	1	1000	2	4440003	World of Veg	4999 9999 4444 4441
29	Onions	V00004	Vegetable	Vegetable	4	3	5	1	1000	2	4440004	World of Veg	4999 9999 4444 4441
30	Garlic	V00005	Vegetable	Vegetable	4	3	5	1	1000	2	4440005	World of Veg	4999 9999 4444 4441

Sheet1 Sheet2 Sheet3 ⊕

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 Backup Guide (https://support.zoho.com/portal/advanceprotechnologies/helpcenter/articles/admin-utilities-guide).
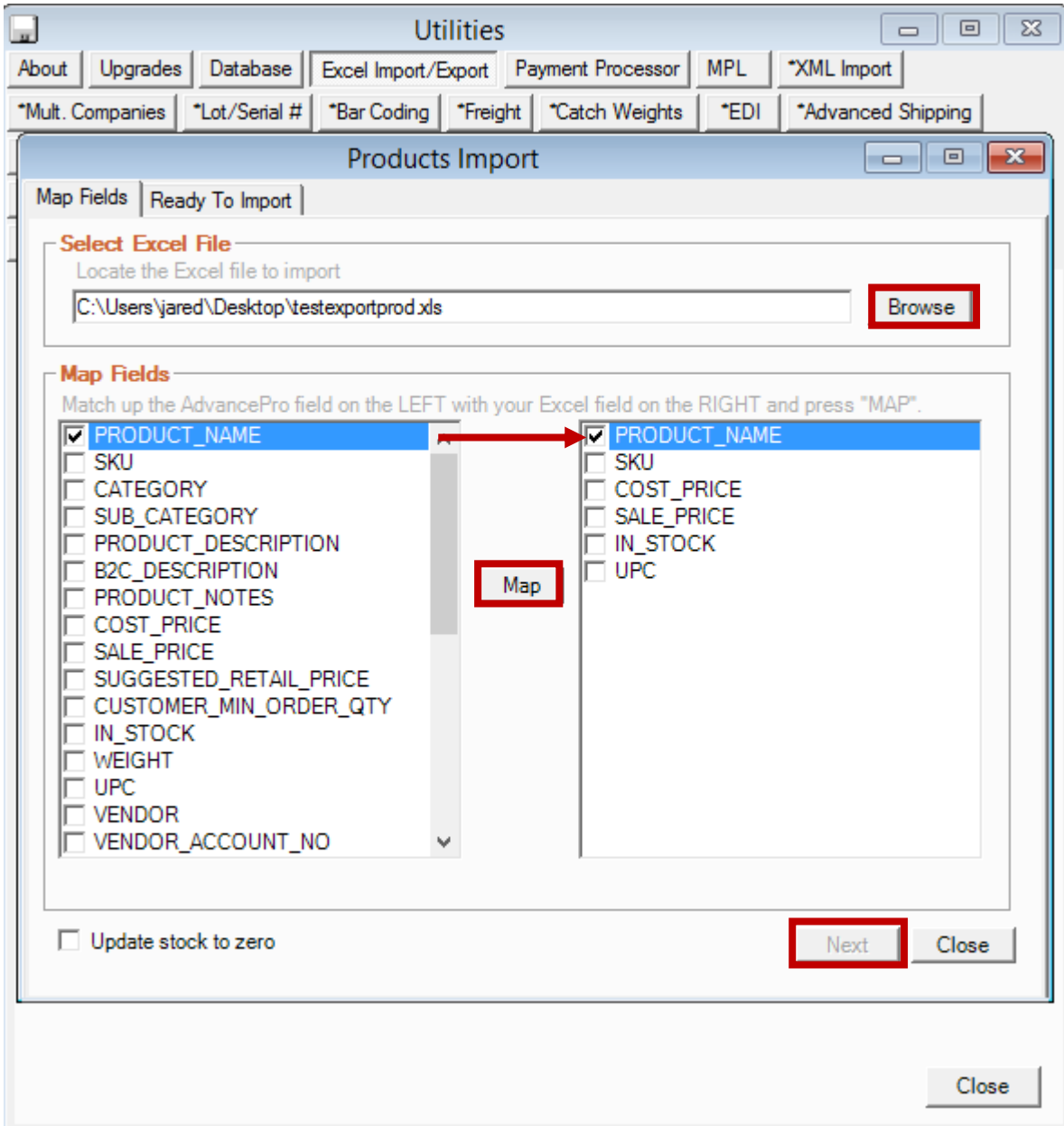
3. Access the "Utilities" menu in AdvancePro.
   1) Click "Admin" to bring up the Admin panel.
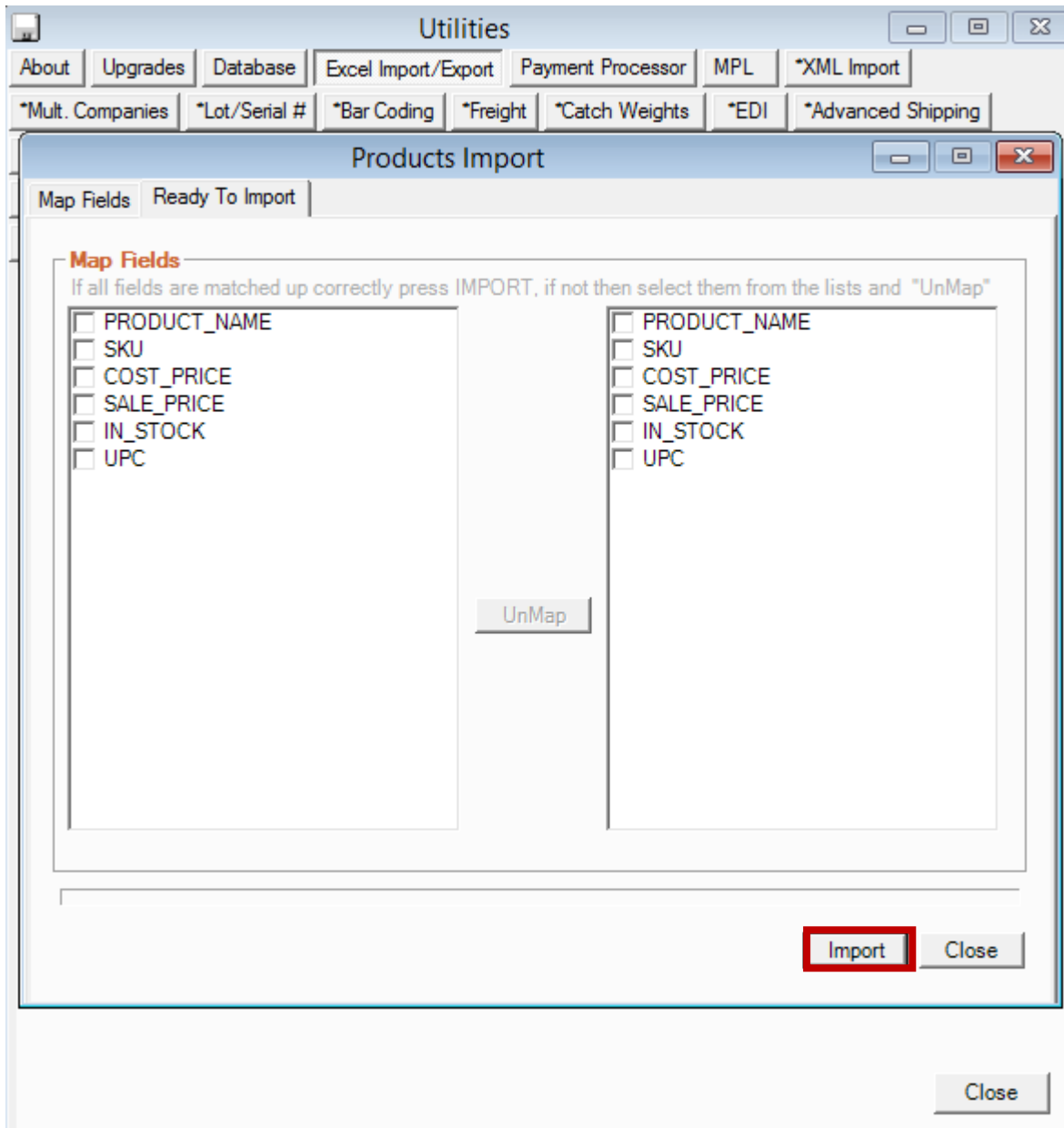   2) Click "Utilities" to access the Utilities menu.

4. Access the "Import Products" screen.
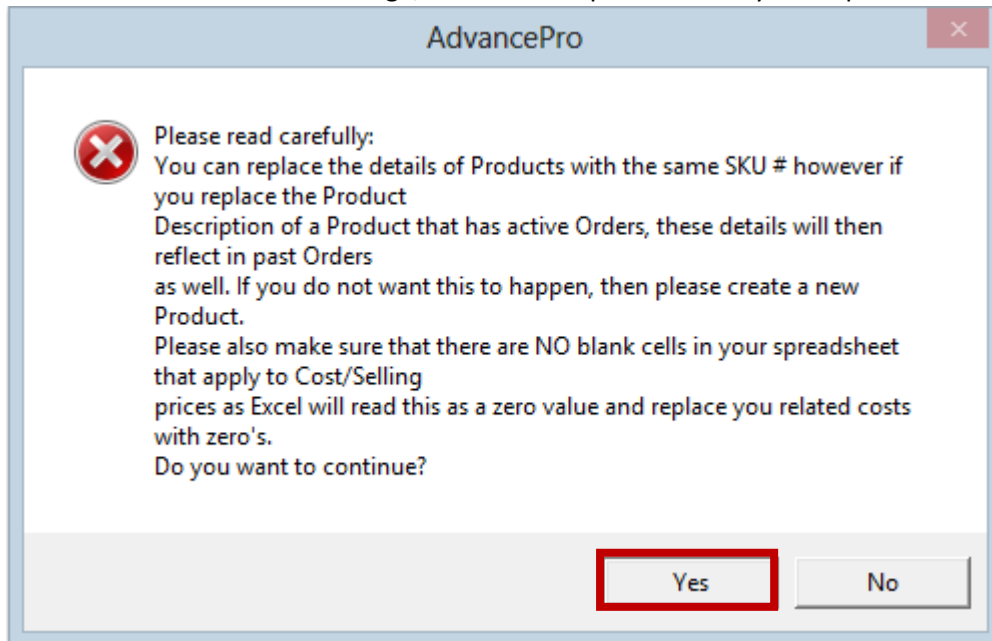   1) Click "Excel Import/Export"
    2) Click "Import Products"

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".
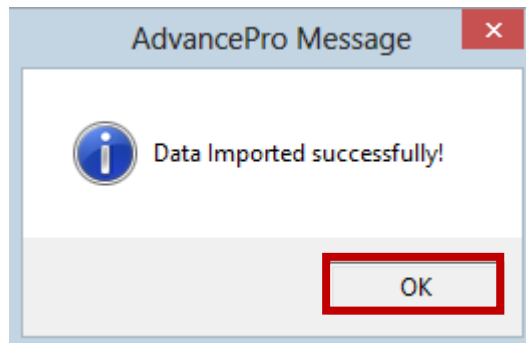   3) Once you have finished mapping your fields, click "Next".

6. 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".

7. 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.

4. Updating Product Information

When importing products into AdvancePro, new product records are created based on the "SKU" field. If you wish to create a new product through Excel import, you must enter a new SKU number into your Excel sheet in order to import it. If you simply wish to update product information, simply include the Product Name and SKU number as well as any fields for which you would like to update the information. You do not need to include fields in your import if the information is remaining constant. For illustration, we will demonstrate updating pricing for all products:

1. Create an updated spreadsheet that includes the Product_Name and SKU fields (SKU must remain constant) as well as any other fields you wish to update. In this case, we are updating selling prices for all products. Make sure to follow the formatting rules specified earlier in this document.

	A	B	C
1	PRODUCT_NAME	SKU	SALE_PRICE
2	Drum Stick	C00001	6
3	Chicken Breast	C00002	6
4	Wings	C00003	4.5
5	Neck	C00004	4.5
6	Thigh	C00005	7.5
7	Liver	C00006	4.5
8	Heart	C00007	4.5
9	Gizzard	C00008	4.5
10	Feet	C00009	4.5
11	Tail	C00010	4.5
12	Ground Beef	B00001	9
13	Sirloin Steak	B00002	7.5
14	T-Bone Steak	B00003	7.5
15	Tenderloin Steak	B00004	7.5
16	Beef Back Ribs	B00005	9
17	Beef Cubes	B00006	7.5
18	Shank	B00007	7.5
19	Brisket	B00008	7.5
20	Pork Spare Ribs	P00001	9
21	Bacon	P00002	7.5
22	Ham	P00003	9
23	Ground Pork	P00004	9
24	Pork Back Ribs	P00005	9
25	Pork Cubes	P00006	7.5
26	Potato	V00001	4.5
27	Cabbage	V00002	4.5

Sheet1

2. Follow the same steps as outlined in steps 2-8 in the "Importing Products" section.