

Customer Pricing 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:

[Customer Pricing Import Schema.xls](#)

RULES TO FOLLOW WHEN IMPORTING A SPREADSHEET:

1. The first sheet must be named "Sheet1". Notice that there is no space between 'Sheet' and '1'.
2. No other sheets should exist except for 'Sheet1'.
3. Make sure to save the file as an '.XLS' file.
4. Format everything to 'Text' format.

Importing Customer Pricing

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

1. Fill out the ‘Customer Pricing Import Schema’ with your information and save it as a .xls file in your ‘C’ Drive.
 - 1) Your headers should be SKU, ProdName, Customer Numbers as in the example

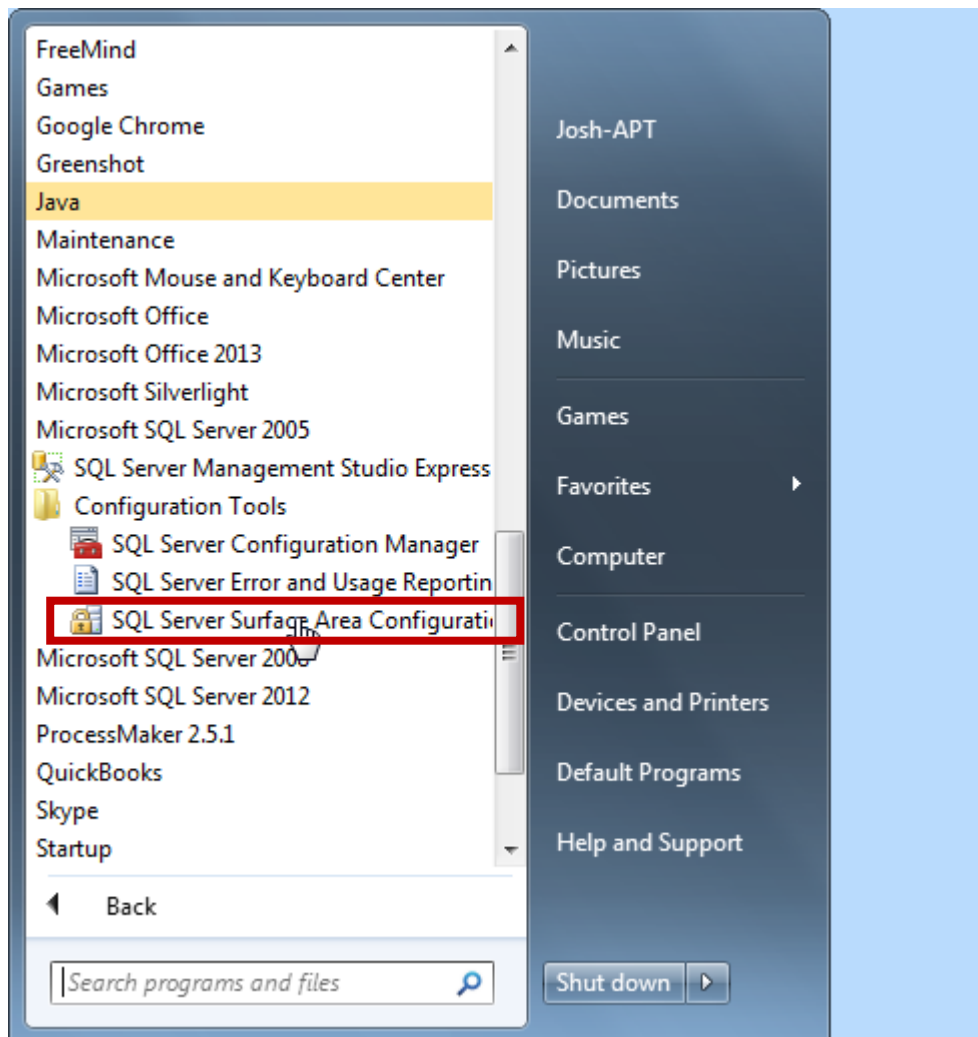
Note: The Excel document must be saved as a .xls file

Note: Account numbers need to have been created for the accounts you wish to create special pricing for.

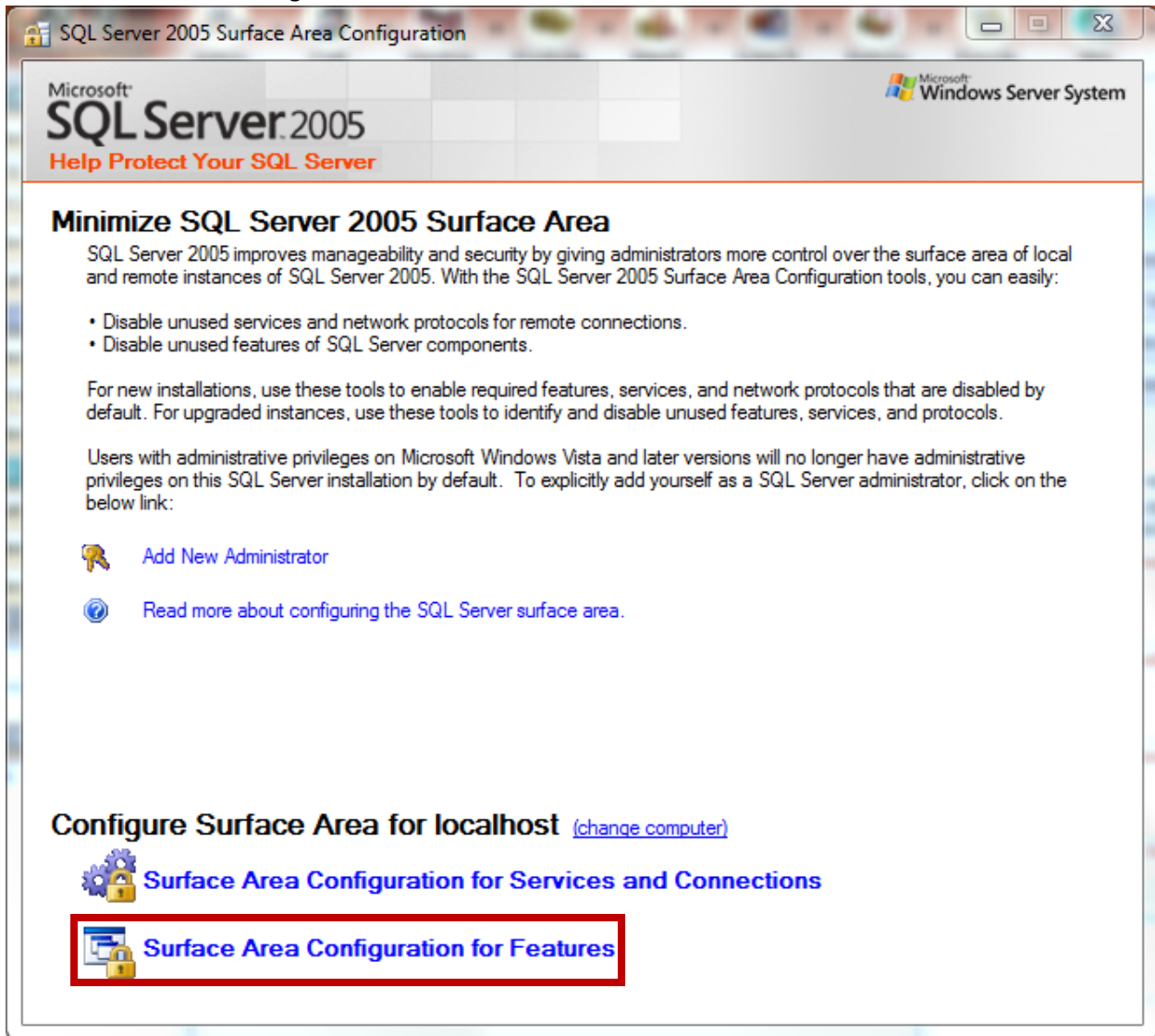
Note: Prices are imported in the default system currency only.

SKU	ProdName	2000 0000 2222 2221	1000 0000 1111 1111	3000 0000 3333 3331
B00008	Brisket	15	20	17
B00005	Beef Back Ribs	12	14	13
B00001	Ground Beef	9	11	10

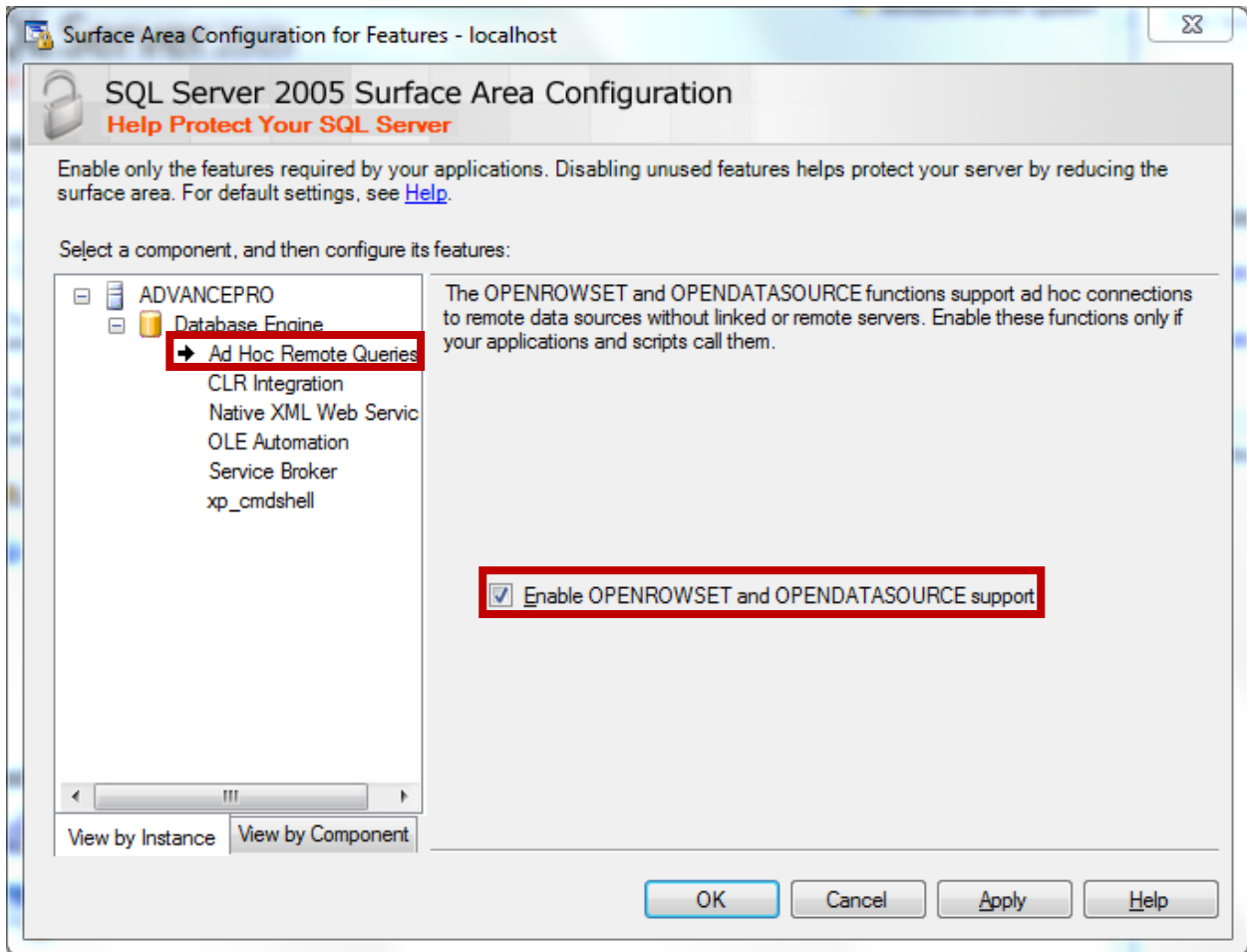
2. In your start menu, open Microsoft SQL Server 2005 > Configuration Tools > SQL Server Surface Area Configuration Tools.



3. Select 'Surface Area Configuration for Features'.



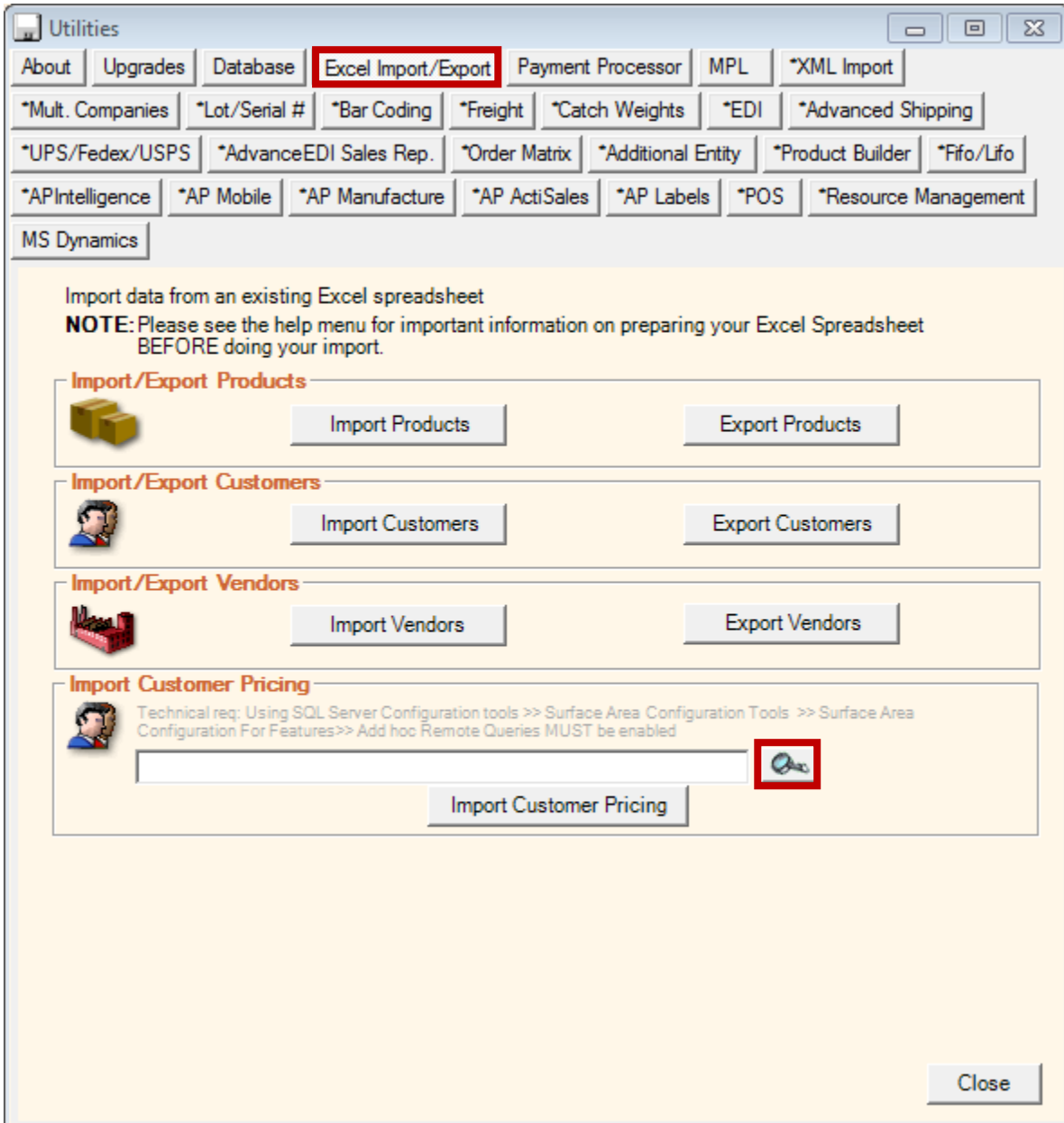
4. Select 'Ad Hoc Remote Queries' and make sure it is enabled.



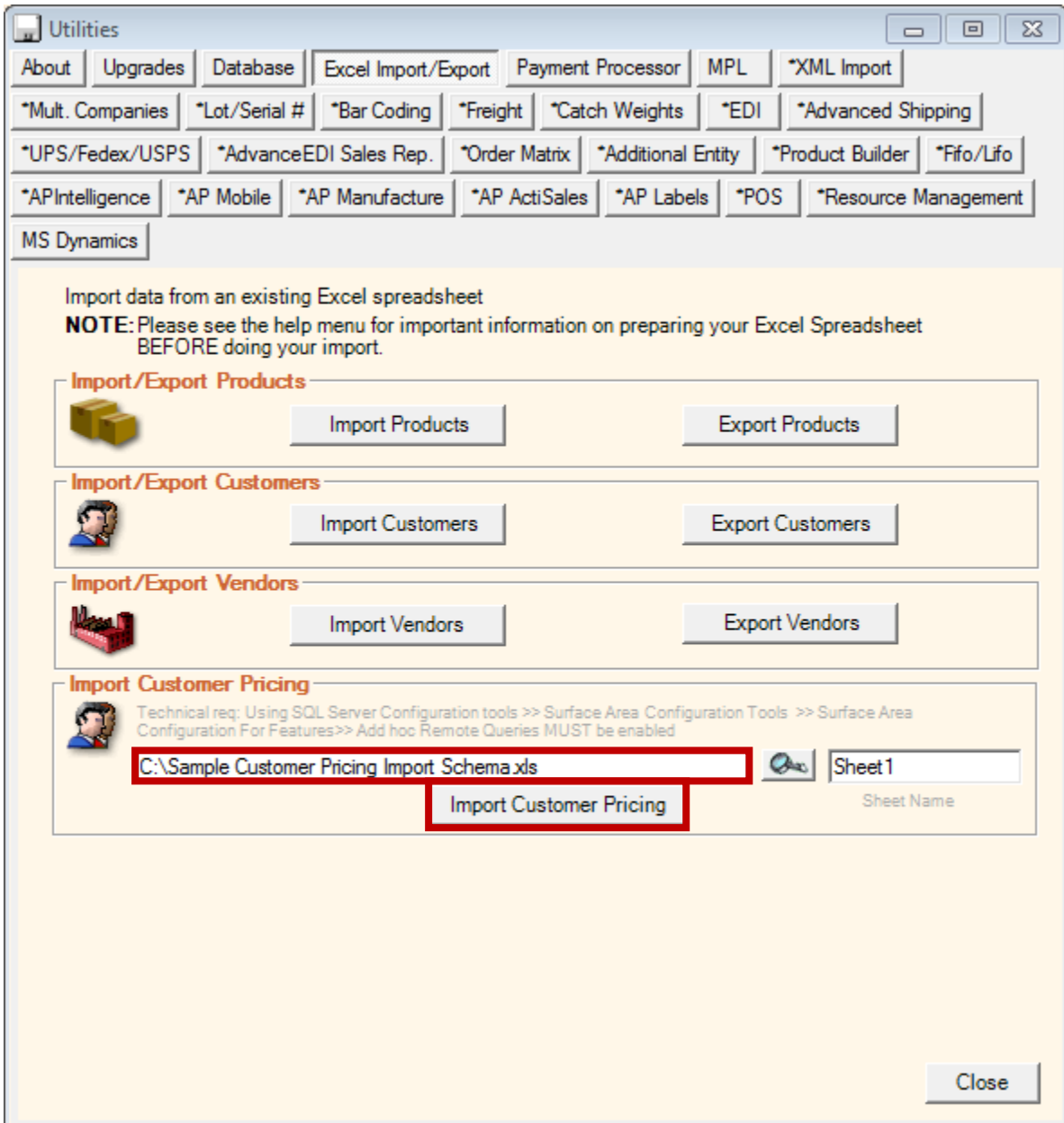
5. Now that the system setup has been properly setup, we can go ahead with our pricing import.
 - 1) Click “Admin” to bring up the Admin panel.
 - 2) Click “Utilities” to access the Utilities menu.



6. Access the “Import Customer Pricing” screen
 - 1) Click “Excel Import/Export”
 - 2) Click the magnifying glass to search for your customer pricing file.



7. Once you have found and selected your customer pricing file, click on “Import Customer Pricing.”



8. AdvancePro will produce a report confirming that your pricing has been updated

Customer Pricing Import Results

July-30-14

No	SKU	Cust. Name	Prod. Name	Percent	Price	Discount	Status
1	B00008	Pig-out Fastfood	Brisket	240.00	17.00	Markup	updated
2	B00005	Pig-out Fastfood	Beef Back Ribs	116.67	13.00	Markup	updated
3	B00001	Pig-out Fastfood	Ground Beef	66.67	10.00	Markup	updated
4	B00008	Crispy Chicken Pika-pika	Brisket	300.00	20.00	Markup	updated
5	B00005	Crispy Chicken Pika-pika	Beef Back Ribs	133.33	14.00	Markup	updated
6	B00001	Crispy Chicken Pika-pika	Ground Beef	83.33	11.00	Markup	updated
7	B00008	Beefy Grills	Brisket	200.00	15.00	Markup	updated
8	B00005	Beefy Grills	Beef Back Ribs	100.00	12.00	Markup	updated
9	B00001	Beefy Grills	Ground Beef	50.00	9.00	Markup	updated

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